blackbaud™

Target Analytics®

How to Use Research Lists in ResearchPoint

Last Updated: 2/2/2017 for ResearchPoint 4.94
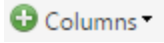
Contents

Research Lists

Research Lists are groups of individual constituents. They help you more effectively research potential prospects in batches so you don't need to qualify prospects one-by-one.

The list can be static or dynamic, depending on whether you want to enable the list to be refreshed. For example, you can save time manually adding prospects to your research list of prospects with more than one million in confirmed total assets and a high major giving capacity. When you set your research list criteria, enable the list to refresh automatically every night. Every day prospects who match your criteria are added to the list for you.

The greatest power of Research Lists is in two key features:

1. **Group WealthPoint screenings** - When you develop lists, you can focus your efforts on the constituents with the greatest capacity. You can also perform quick scans of new prospects. With the **Screen list** task, you can batch send a group of constituents through a WealthPoint screening! Whether you're looking for wealth information on a first screening or re-screening a group of prospects for new information, the group WealthPoint screening enables you to get new data more efficiently.

2. **Customizable columns** - The Members list is one of your greatest assets as a prospect researcher. The Columns button at the top of the list enables you to select which biographical and wealth fields you want to see. Once the columns appear, you can drag and drop them into the order you want to see data. You can sort by columns. And, you can filter by columns. The filter especially helps you to identify which prospects in the list hold the greatest value to your organization. To decide which columns mean the most to you, think about which indicators on a prospect's wealth and ratings records gives you the most insight. Once the records are filtered, select the remaining records. You can then copy them to a new, separate research list or assign a prospect manager. Or, you can do the opposite. You can filter the records to find those constituents who do not provide great opportunity at this time, select the records, and then remove from your list. This enables you to narrow down your research in a more time-effective manner!

To get started with research lists, learn how to create one!

To open a research list already set up, from the Research Lists page, in the **Name** column, click the research list name link.

Access Research Lists

You access the research list functionality from *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

Warning: Only individual records can be added to Research Lists. You cannot include organizations.

Add a Research List

When you add a research list, you select the criteria you want used to build your group of constituents. Or, if you would rather, you can also create your list from a selection that was created in *Query*.

> Add a new research list

1. From *Prospects*, in the **Research Lists** section, click **Add**. The Add research lists screen appears.

   Tip: You can also add a new research list from the Research Lists page.

2. In the **What is the criteria for creating your list?** section, you can build your list based on biographical and wealth fields available in *ResearchPoint*. For a list of fields included with each option, see Research List Criteria Fields on page 6. This enables you to set rules as you go for which constituents you want to include in your list. No need to create a query in advance.

   You add criteria one at a time. To add criteria, select one of the categories.
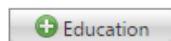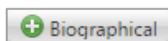
3. Then, choose which field in that category to search for and find constituent records that match your criteria. After you enter your parameters for the field, click **OK**. You return to the add research list screen and your criteria appears.

   With the red X and the pencil icons you can delete or edit if the parameters are wrong. Otherwise, continue to add as much criteria as you need.

4. In the **Do you need to further narrow your list?** section, you can base your list on a group of records created in *Query*. Click the **Selection Search** icon to locate an existing selection.

   You can create your research list using a combination research list criteria and a query selection.

   Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

5. Click the **Calculate total prospects** button at any time to see how many prospects satisfy your criteria. This can especially help you when you set criteria if you have a goal of how many prospects maximum should appear in your research list.

6. In the **Save options** section, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.

   Note: Depending on your user role in the system, some options may be grayed out.

7. In the **Description** field, enter a description to help you identify the list. We recommend you summarize what criteria was used.

8. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.

9. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.

10. Decide if you want to allow others to access and/or edit this list.

11. To automatically update your research list to include new prospects satisfying your list criteria as they are added to your system, select **Allow this list to be refreshed**. You then determine how the list can be refreshed.

12. Click **Save**. Your new research list appears for you to start researching!

Research List Criteria Fields

You can build Research Lists based on any combination of the following fields.

❯ Biographical Category Fields

List View Column	Field Type	Note
Age	#	
Any business	Text	From name of organization relationship
Any business city	Text	From address of organization relationship
Any business job title	Text	From title of organization relationship
Any business state	Text	From address of organization relationship
Any city	Text	From contact address
Any state	Checkbox	From contact address
Any ZIP	Text	From contact address
Constituency	Checkbox	Constituencies are set up in *Administration* on a code table.
Date added to system	Date	
First name	Text	
Last name	Text	
Primary business	Text	
Primary business city	Text	
Primary business job title	Text	
Primary business state	Checkbox	
Primary city	Text	
Primary state	Checkbox	
Primary ZIP	Text	
Prospect manager	Text	
RE last sync date	Date	Shows only if integrated with The Raiser's Edge.
RE linked?	Y/N	Shows only if integrated with The Raiser's Edge.
Spouse	Text	

❯ Education Category Fields

For criteria with a checkbox, you can edit the options that appear. From *Administration*, under **Data**,

click **Code tables**.

List View Columns	Field Type	Notes
Any class of	#	Enter the full year.
Any college/school	Checkbox	
Any degree	Checkbox	
Any degree type	Checkbox	
Any department	Checkbox	
Any division	Checkbox	
Any education institution	Checkbox	
Any educational involvement	Checkbox	
Any program	Checkbox	
Any sub department	Checkbox	
Primary class of	#	Enter the full year.
Primary college/school	Checkbox	
Primary degree	Checkbox	
Primary degree type	Checkbox	
Primary department	Checkbox	
Primary division	Checkbox	
Primary educational institution	Checkbox	
Primary educational involvement	Checkbox	
Primary program	Checkbox	
Primary sub department	Checkbox	

❯ Giving Category Fields

List View Column	Field Type	Notes
First gift	$	
First gift date	Date	
First gift designation	Text	
First gift type	Text	
Largest gift	$	
Largest gift date	Date	
Largest gift designation	Text	
Largest gift type	Text	
Latest gift	$	
Latest gift date	Date	
Latest gift designation	Text	
Latest gift type	Text	
Philanthropic gift category	Checkbox	
Philanthropic gift confirmed	#	
Philanthropic gift identified	#	
Philanthropic gift location	Text	
Philanthropic gift type	Text	
Philanthropic giving gift year	#	Enter the full year.
Philanthropic giving high value	$	
Philanthropic giving low value	$	
Political donation gift amount	$	
Political donation gift date	#	
Political donations confirmed	$	
Political donations identified	$	
Total giving	$	
Total number of gifts	#	

❯ Ratings Category Fields

List View Columns	Field Type	Notes
Annual giving likelihood	#	
Annuity likelihood	#	
Bequest likelihood	#	
CRT likelihood	#	
Major giving likelihood	#	
Membership likelihood	#	
Planned giving likelihood	#	
Suggested membership level range	checkbox	
Suggested membership level score	checkbox	
Target gift range	checkbox	
Target gift range score	checkbox	

❯ Wealth Category Fields

List View Columns	Field Type	Notes
Business company valuation	$	
Business job title	Text	
Business confirmed value	$	
Business identified value	$	
Estimated wealth value	$	
Income/compensation confirmed value	$	
Income/compensation identified value	$	
Last screening date	Date	
Major giving capacity value	$	
Other assets confirmed value	$	
Property city	Text	
Property county	Text	
Property state	Text	
Property valuation	$	
Property ZIP	#	
Real Estate confirmed value	$	
Real Estate identified value	$	
Securities confirmed value	$	
Securities identified value	$	
Total assets confirmed value	$	
Total assets identified value	$	
Wealth indicators confirmed	#	
Wealth indicators identified	#	

Edit a Research List

You can easily edit an existing research list. You can update:

- Criteria options
- Selection files
- Name, Description, and Category information
- Access Permissions

However, you cannot edit refresh options.

› Edit a prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

    Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. Expand the list you want to edit.

3. Click Edit. The Edit research list screen appears.

4. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in *ResearchPoint*. For a list of fields included with each option, see Research List Criteria Fields on page 6.

    Tip: You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

5. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

    Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

6. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.

7. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.

8. In the **Save options** section, enter the following:

    Note: Depending on your user role in the system, some options may be grayed out.

    a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.

    b. In the **Description** field, enter a description to help you identify the list.

    c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.

    d. You can also allow other users the access and/or edit your list.

    e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.

    f. Decide if you want to allow others to access and/or edit this list.

    g. To make your list dynamic, which means it is automatically updated to include new

prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.

9. Click **Save** to save the new list and return to the Research lists page.

Delete a Research List

You have the option to delete a research list from the Research Lists page or from the research list itself.

> **Warning:** If you attempt to delete a research list on which **WealthPoint** updates have been performed, you cannot delete the group without first deleting the **WealthPoint** search history related to the research list.

Perform WealthPoint Screenings on Research Lists

If your organization uses **WealthPoint** service, you can run a wealth screen on all members in the list.

When updating **WealthPoint** information, the system does not override any manually entered data you stored on a given prospect. For example, if you entered real estate information for a constituent and real estate information is included in the **WealthPoint** screen, whatever information you entered remains intact after the screen.

> ## Wealth screen all members of a research list

1. From *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. To open the research list, on the Research Lists page, in the **Name** column, click the name link.

3. In the summary section at the top of the page, click **Screen list.**

4. A confirmation screen appears. Click **Yes** to continue.

> ***Warning:*** Only members with the ***WealthPoint*** update option enabled are processed. If you marked **Disable WealthPoint** on any member records, those members are not included in the update.

❯ Wealth screen selected members of a research list

1. From *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. To open the research list, on the Research Lists page, in the **Name** column, click the name link.

3. In the **Members** list, select the checkboxes for each constituent you want to screen.

4. At the top of the **Members** list section, click **Screen (# selected)** .

Track Number of Remaining Group Screens

From *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

To open the research list, on the Research Lists page, in the **Name** column, click the name link.

On the top right side of the page, the **Group screens remaining** field displays the number of group screens you have left.

How to Use Research Lists

Learn how to perform the following tasks on a research list:

- Add members to the list
- Edit the list configuration options
- Generate a research list report
- Delete the list
- Copy selected list members to another list
- Remove members

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.
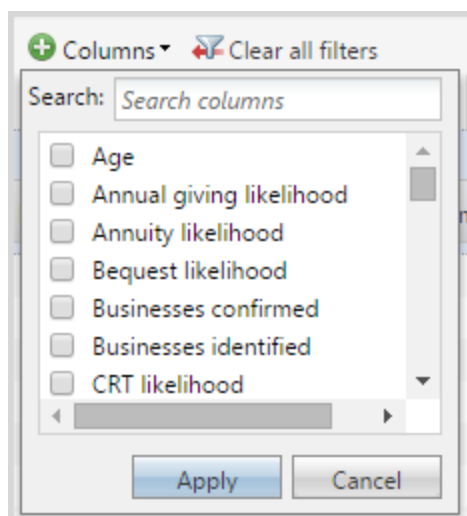
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

Once you add and remove the columns you need, you can:

- Drag and drop columns to display the information in the order you want to see it. Click the column header and drag left or right to the position you prefer. Those that you don't need as often can be moved to the far right.

    Tip: When you read information on a computer screen, you naturally read the far left side from top to bottom first, then across. Remember this when you choose which order to display your columns.

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side ⟷ . Then, double-click your mouse. The

columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.

- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.
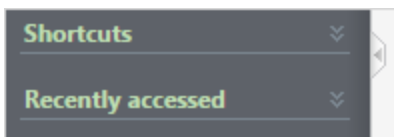
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel icon next to the column

  header name.

> *Warning:* Filters are sticky; they remain even after you navigate from the research list.

Once you get the columns customized to your needs, the application remembers your changes so you see the same view every time you access this list; however, if at any point you want to return the list view to the application's default settings. Under the **More** button, click the **Restore grid defaults**.

List Pagination

If your list contains more than 100 members, we paginate the records for you. Use the page links on the top right and bottom right of the page to navigate.

Use Search

Quickly search for content included in the **Members** list. The search is based on displayed columns. Add all columns you need before you perform the search.

Members List Links

When you add and remove columns from the **Members** list, you may notice some columns contain hyperlinks.

All name hyperlinks open the individual's wealth and ratings record. To navigate back to the research list quickly, from the Wealth Summary tab, under **Research details**, click the research list name or click your browser's back button.

The hyperlinks that appear for **Total confirmed assets** and **Total identified assets** columns, open a wealth summary screen.

Add Members to a Research List

After you create a list, regardless of the method or criteria used to populate the group, you can manually add individual members, even members not satisfying your original criteria.

From a research list, in the **Members** list, click **Add member**. The Add research list member screen appears.

Click the search icon to access the Individual Search screen. From here you can search for and select the new member. You can also add constitutes to your database from the search screen by clicking the **Add** button.

Once the new member has been selected or added, from the Add research list member screen, click **Save**. The new member is added to the list.

Copy List Members to a New or Existing Research List

You can copy one or a selected group of list members from your current research list to a new or existing research list. The list member retains membership on the current research list unless you decide to take action to remove.

Whether you copy one list member or several, you can search for and select an existing research list to copy the members to or you can create a new research list. The new research list has limited options but you can edit the name, description, owner, category, and whether others can access or edit the list. Once the new list is created, you can edit additional options.

❯ Copy One Member

From a research list, under **Members**, click the double arrows for a list member ⬇. An action bar appears for the constituent. Click **Copy to list**. The Copy prospects to list screen appears.

❯ Copy Selected List Members

If you need to copy several members, in the **Members** list, select the checkboxes for the members you want to include.

At the top of the **Members** list, click **Copy to list (number selected)**. The Copy prospects to list screen appears.

Assign a Prospect Manager to a Research List

On a research list, you can assign a prospect manager to one or selected members.

❯ Assign to One Member

From a research list, under **Members**, click the double arrows for a list member ⬇. An action bar appears for the constituent. Click **Assign prospect manager**. The Assign a prospect manager screen appears. Search for and select a manager. Click **Save**.

> **Assign to Selected Members**

If you need to assign the same manager to several members, in the **Members** list, select the checkboxes for the members you want to include in the assignment.

At the top of the **Members** list, click **Assign prospect manager (number selected)**. The Assign a prospect manager screen appears. Search for and delect a manager. Click **Save**.

Enter Research Details for List Members

From a research list, under **Members**, click the double arrows for a list member . An action bar appears for the constituent. To enter a the research summary, click **Edit research details**. For more information about how the research details fields are used in ResearchPoint, see Edit Research Details on page 18.

Edit Research Details

From the following locations in **ResearchPoint**, you can update the prospect's status and prospect manager.

- Prospect Record, Wealth Summary tab, in the Research details section, click **Edit**.
- From a research list, click the double arrows next to a list member and click **Edit research details**.
- From a household, organization, or group prospect record in **ResearchPoint**, on the explorer bar, under Tasks, click **Edit research details**.

Before you change the research details for a prospect, review the following about each field to understand what it means when you make the change.

When you select confirmed, you indicate that research is complete on a prospect. Do not mark the checkbox until you are confident that all your research is complete. When you save a prospect with a confirmed status, they are flagged as a major giving prospect.

We recommend in these two examples, that you do not mark the checkbox.

- If you complete an initial wealth screen on a prospect and the data found does not meet your organization's criteria as a "prospect" to pursue further, do not mark the **Confirmed** checkbox. In this situation, the research is not complete because you chose not to do any further research.

- If you complete an initial wealth screen and find a very wealthy prospect that you know your organization will want to ask for a gift, do not mark the **Confirmed** checkbox until research is complete. In this situation, you may be planning to spend more time carefully analyzing the data for the prospect. When all the research is finalized, return to the Edit research details screen and mark the checkbox then.

In the **Prospect Manager** field, assign for the first time or re-assign a prospect to a prospect manager. For example, you may find that in your research that the prospect lives full-time in a geography that is better served by a different prospect manager. Re-assign to the person who is a better fit.

The **Research summary** field is a place for you to add a summary about the prospect, which can show up in the research report. It may contain some biographic summary, some ideas on how the prospect should be solicited, and interesting tidbits that came up during your research.

List Member Wealth Summary

Prospectors and fundraisers working in a list record can easily access additional wealth information on members.

To display the Wealth summary screen, click the link in the **Total confirmed assets** or **Total identified assets** columns.

If you click a link from the Wealth summary screen, the member's wealth and ratings record opens to the location where the information came. For example, if you want to view a member's real estate information in more detail, click the **Real estate** link in the **Assets** column. The list member's wealth and ratings record opens to the Assets tab with the **Real estate** section expanded.

The "New" icon identifies assets and indicators that have been updated since the last time this record was viewed.

Delete Members from a Research List

After you create a list, regardless of the method or criteria used to populate the group, you can remove individual members.

From the research list, select the checkboxes for the members you want to remove. When you select the members, additional actions appear. Click **Remove member (# selected)**.

> *Warning:* Do not select the **Delete** button at the top of the **Members** grid. This button deletes the entire list.

Split a Research List

If you have large research lists, you can split the lists into smaller groupings to facilitate batch processing. You can add, edit, and view split lists.

> *Note:* This feature is available only for users who have the Prospect Research role.

> **Split a research list**

1. From *Prospects*, in the **Research Lists** section, select the research list you want to split.
2. Click **Split list**.
3. In the Research list split list screen, specify the size (in number of records) of the child research list(s) you want to create, then click **Split**.

   Two or more sub-queries (child research lists) are created from the original research list, based on how many records are in the original research list and the split list size you specified. For example, if you have a research list containing 19,620 records and you specify a split list size of 2,500, **ResearchPoint** creates eight sub-queries; seven sub-queries with 2,500 records each and one sub-query with the remaining 2,120 records.

You can view the sub-queries created by other Prospect Researchers, but you can only edit the sub-queries that you created.

Map Locations of Research List Members

From the research list, in the **Members** section, click **Map**. The Mapping page appears displaying the members' locations.

> *Note:* You can also map list members from the Research Lists page by expanding the list you want to map and clicking **Map**.

The maximum number of pushpins that can appear in Mapping is 250 list members.

For more information about Mapping, see the Mapping Guide.

Research List Report

The Research list report enables prospect researchers to prepare and print reports that include all members of a selected Research List.

> *Note:* Report capacity is 500 records.

The report includes a detailed profile of each list member. In addition to the list member's name and contact information, the report includes:

- **Prospect Summary**: Primary business, birth, gender, and spouse information
- **Notes**: Any notations, media links, or attachments included on the Documentation tab of the prospect's constituent record

The details view of the report, accessed by clicking the **View details** link included on the report screen, includes additional information pulled from the prospect's constituent record, such as constituencies and relationship data.

❯ Generate a Research List report

From the research list, in the **Members** section, click **Research list report**.

> *Note:* You can also generate a research list report from the Research Lists page by expanding the list you want to report on and clicking **Research list report**.

Disable WealthPoint Screens on Selected Members

On a research list, you can disable WealthPoint for selected members. In the **Members** list, click the double arrows for the constituent's row and click **Disable WealthPoint**.

Even when you perform a group WealthPoint screening, this constituent will not be included. The record will remain disabled in the research list until you choose to enable.

Also, if you perform this action on a research list, it disables WealthPoint screenings from their individual wealth and ratings record. You can turn WealthPoint screenings back on from either the research list or the individual wealth and ratings record.

Raiser's Edge Integration in Research Lists

From research lists, you can quickly import records into **ResearchPoint**, sync groups of records, and link/unlink list members with **The Raiser's Edge**.

We recommend after you set up the configuration to create research lists, with a maximum of 2,000 members, to sync between **ResearchPoint** and the **Raiser's Edge**. You can still sync prospects individually, however research lists are a more efficient way to keep your databases updated.

> **Tip:** For any prospects included in the list that are linked to a constituent record in **The Raiser's Edge** the word "Yes" appears in the **RE7 linked?** column of the **Members** grid.

Create a Research List from a Raiser's Edge Query

1. From the **Prospects** page or Research Lists, click **Add list from RE**. The Select The Raiser's Edge query to add screen appears.
2. To import records into ResearchPoint and create a new (or add to an existing) research list, enter the criteria and search for a group of records saved to a query in **The Raiser's Edge.**
3. In the **Results** grid, click the query name and click **Select**.

   > **Note:** In order for the **Raiser's Edge** query to import into **ResearchPoint**, the **Constituent information \ System Record ID** field must be included as an output value.

   The query processes and the Research List Import screen appears.
4. Create a new research list or select an existing research list and click **OK**.
5. The Research List Add Constituents screen appears if records in the research list are not linked to records in **ResearchPoint**.
6. Select to add any unlinked records to **ResearchPoint** or select to ignore the remaining records and click **OK**.

   If you select to add the records, when you click **OK**, the records sync and the constituents are added to **ResearchPoint** for you to research.
7. The research list appears for you to review the information and if ready, screen the list with **WealthPoint**.

   > **Tip:** After you complete work in the research list, such as when you screen for new WealthPoint information and edit research details, use the **Sync with RE** to sync a group of records all at once.

Link a List Member to a Raiser's Edge Constituent Record

From an open research list, expand a prospect in the Members grid and click **Link with RE**. The Link to The Raiser's Edge Search screen appears for you to search for and select the constituent to link. When you link the records, the data synchronizes.

ResearchPoint 4.94 How to Use Research Lists in ResearchPoint US