Development Officer Guide

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Development Officer

The information included in this user guide is specific to the Development Officer role in ***ResearchPoint***. It includes information and procedures about only those features available to the development officer role.

My Fundraiser Page

The Development Officer's fundraiser page displays all research request information submitted by the associated officer. This page is accessed by clicking **My fundraiser page** from the Prospects page.

Note: For the **My Fundraiser page** link to work, the Development Officer's **Application User** must be linked to a constituent in the system and the constituent mush have a constituency of "Fundraiser." Your system administrator must complete this configuration before your **My fundraiser page** link will work.

Add New Prospects

You can manually add new prospects from the Prospects page.

Tip: The best way to add new prospects is from the Search page. This allows you to first search for the prospect to confirm he does not exist in your database. If the prospect does not exist, you can then quickly add him and run a wealth scan, all from the same location. For more information on this process, see Search for a Prospect on page 5.

Add an individual prospect

1. From the Prospects page, under **Prospect research**, click **Add an individual**. The Add an individual screen appears.
2. Complete as many fields as possible.
3. Click **Save** to save the new record and close the Add an individual screen.

Add an Individual Screen

The Add an individual screen contains three tabs on which you can enter data.

Individual Tab

The table below explains the items on the Individual tab of the Add an individual screen.

Note: Some of these fields also appear on a simplified "Add an individual" screen accessed from certain areas of the program, such as some constituent search screens.

Screen Item	Description
Last name, **First name**, **Middle name**	Enter the name of the individual exactly as it should appear throughout your database such as on pages and reports.

Screen Item	Description
Title and **Title 2**	Select a title for the individual such as Mr., Mrs., or Ms. You can select a second title if necessary such as "Reverend Dr."
Suffix and **Suffix 2**	Select a suffix for the individual such as Sr. or M.D., as necessary. You can select a second suffix if necessary, such as "III Esq."
Nickname	Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria.
Maiden name	Enter a maiden name for the individual as necessary. On the constituent record, the maiden name entered appears as an alias on the Names tab. When you search for individual constituents, you can select to include maiden names in the search criteria.
Marital status	Select whether the individual constituent is single, married, or divorced.
Birth date and **Age**	Enter the individual's date of birth, such as 10/10/1941. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed.
Gender	Select whether the individual is a male or female. If you are unsure of the individual's gender, select Unknown.
Address type	Select the type of address to use as the primary contact for the individual, such as Home or School Residence. When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab.
Country	Select the country of the individual's primary address.
Address	Enter the primary street address or post office box for the individual.
City	Enter the city or town for the individual's primary address.
ZIP	Enter the Zip code for the individual's primary address.
Do not send mail to this address	If the individual requests that you not send mail to the primary address, select this checkbox.
Reason	If you select **Do not send mail to this address**, select why the constituent requests to not receive mail at the primary address.
Phone type	Select the type of phone number to use as the primary contact for the individual, such as Home or Business. When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab.
Phone number	Enter the primary phone number for the individual. If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*. If phone formatting is disabled, you can manually enter the phone number as it should appear.
Email type	Select the type of email address to use as the primary contact for the individual, such as Personal or Business. When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab.
Email address	Enter the primary email address for the individual. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the individual.
Information source	Select the information source for the contact information, such as "Family member." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

Household Tab

The table below explains the items on the Household tab of the Add an individual screen.

Screen Item	Description
Full name	Search for the individual to add as a spouse or household member. To quickly find the constituent, enter the name of the constituent and press **TAB**. If the program matches the name to a constituent in the database, the constituent's name appears in the field. If the program matches the name to multiple constituents, the Individual Search screen appears and displays the matched constituents in the **Results** grid. Select the correct constituent or start a new search. If the individual is not already a constituent in the database, you can add the constituent from the search screen. If you know the individual is not already a constituent, click **Add** in this field to add the constituent.
Copy Individual's primary contact information to Household Member	When you save the new individual constituent, the program automatically generates or updates a record of the constituent household with the individual. To copy the primary contact information of the individual constituent to the record of the household, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab.
Individual is the	Select the relationship the individual has with the household member, such as Husband, Wife, or Partner.
Spouse is the	Select the relationship the household member has with the individual, such as Husband, Wife, or Partner.
Start date	Enter the date the relationship between the individual and household member began such as the wedding date of a spouse relationship, or enter the date you enter the relationship into your database.
This is the spouse relationship for Individual	If the household member is the spouse or partner of the individual, select this checkbox.
Copy Individual's primary contact information to Spouse/Household Member	To copy the primary contact information of the new individual constituent to the record of the new constituent household member or spouse, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab.

Business Tab

The table below explains the items on the Business tab of the Add an individual screen.

Screen Item	Description
Organization name	Search for the organization to add as a business for the individual. To quickly find the constituent, enter the name of the organization and press **TAB**. If the program matches the name to an organization in the database, the organization's name appears in the field. If the program matches the name to multiple organizations, the Organization Search screen appears and displays the matched organizations in the **Results** grid. Select the correct organization or start a new search. If the organization is not already a constituent in the database, you can add the constituent from the search screen. If you know the organization is not already a constituent, click **Add** in his field to add the constituent.
Individual is the	Select the relationship the individual has with the organization, such as Employee.
Organization is the	Select the relationship the organization has with the individual, such as Employer.

Screen Item	Description
Start date	Enter the date the relationship between the individual and organization began such as the date the organization hires the individual, or enter the date you enter the relationship into your database.
End date	Enter the date the relationship between the individual and organization ends, such as the date the individual resigns from the organization. If the relationship is for an undetermined duration, leave this field blank.
Individual is a contact	If the individual is a contact for the organization, select this checkbox.
Contact type	If you select **Individual is a contact**, select the type of contact of the individual for the organization, such as Corporate Donations.
Primary contact	If you select **Individual is a contact**, this checkbox is enabled. If the individual is the primary contact for the organization, select this checkbox. When you run communications processes that include the organization, the primary contact receives the communication.
This organization will match individual's contributions	If the organization is a matching gift company that matches donations made by the individual, select this checkbox.
Recognition credits	Under **Recognition credits**, select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives.
Employment information	If the organization is the employer of the individual, enter employment related information such as job title, category, and career level.

▶ **Add an organization prospect**

1. From the Prospects page, under **Prospect research**, click **Add an organization**. The Add an organization screen appears.
2. Complete as many fields as possible.
3. Click **Save** to save the new record and close the Add a organization screen.

Add an Organization Screen

The table below explains the items on the Add an organization screen.

Screen Item	Description
Name	Enter the name of the organization, exactly as it should appear throughout the program.
Industry	Select the organization's type of industry such as Health care or Education.
Parent org	If the organization is the subsidiary of another organization, click the binoculars. The Organization Search screen appears so you can find and select the organization that owns and controls the new organization.
No. of employees	Enter the number of people employed at the organization.
No. of subsidiary orgs	If the organization is the parent organization of another organization, enter the number of companies the organization owns and controls.
Website	Enter the address to the organization's corporate website. On the constituent record, the address entered appears as a link to the organization's website.
This is a	If the location entered is the main headquarters or office of operation for the organization,

Screen Item	Description
primary organization	select this checkbox. When you search for an organization, you can select to include only primary organizations in the search results.
Image	To add an image for the organization such as the company logo, click **Choose file**. The Open screen appears so you can browse to and select the image file to use. To remove an image associated with the constituent, click **Clear file**.
Address type	Select the type of address to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab.
Country	Select the country of the organization's primary address.
Address	Enter the primary street address or post office box for the organization.
City	Enter the city or town for the organization's primary address.
ZIP	Enter the Zip code for the organization's primary address.
Do not send mail to this address	If the organization or contact requests that you not send mail to the primary address, select this checkbox.
Reason	If you select **Do not send mail to this address**, select why the constituent requests to not receive mail at the primary address.
Phone type	Select the type of phone number to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab.
Phone number	Enter the primary phone number for the organization. If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*. If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the Administration section of the help file. If phone formatting is disabled, you can enter the phone number as it should appear.
Email type	Select the type of email address to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab.
Email address	Enter the primary email address for the organization. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the organization.
Information source	Select the information source for the contact information, such as "Company's website." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

Search for a Prospect

Warning: When running a search, wildcard characters such as "%" can be used only in the advanced search options (click **Show advanced options** on the Search screen). Wildcards do not work in the basic search **– Name or ID** and **Location** fields.

1. Start on the ***ResearchPoint*** Home page, which is the default page when you open ***ResearchPoint***. You can also click **Home** on the menu bar.
2. In the first field on the left, select where you want to search. From here you can search:
   - ResearchPoint only
   - An integrated ***Raiser's Edge*** database
   - The Target Analytics Prospecting database (searches limited by subscription level)
   - For a detailed description of each option, on the Search page, click the **What do these options mean?** icon.
3. In the **Name or ID...** field, enter the prospect's ID or last name information. First name information will not return results. You do not have to provide the full name. For example, you can enter "smi" for Smith. Also, if you do know the first and last name, enter as follows: Smith, John.

   Tip: Including both last name and ZIP code information improves search speeds when searching the Target Analytics database.
4. In the **Location** field, enter any location information you have for the prospect: city, state, street address.
5. Click **Show advanced search** to access additional search criteria such as nickname and age range.
6. Click **Search**. The results grid displays any records located that satisfy your search criteria.

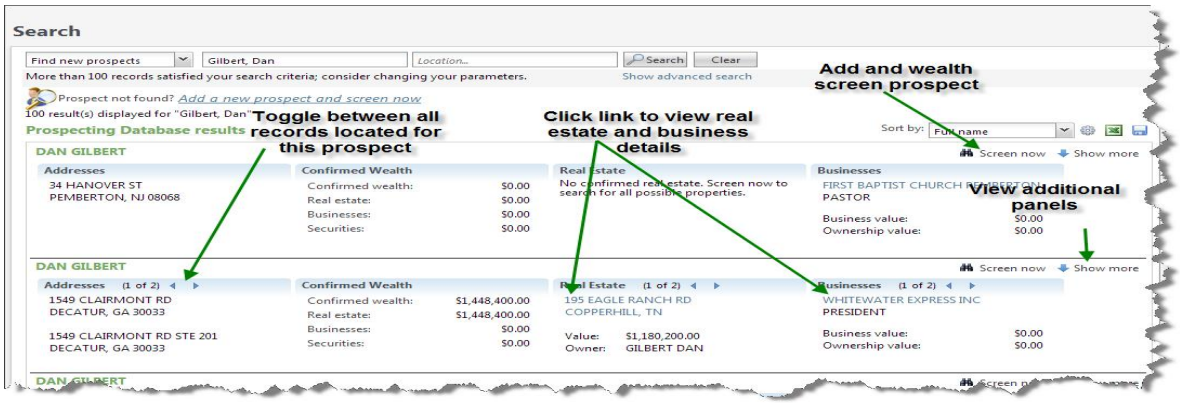
Target Analytics Results Grid

After running a search of the Target Analytics database, you have a number of options in the results grid.

1. Results display in the **Prospecting Database results** grid. The grid displays the following. If an item is not displayed, no information was located for that specific item.

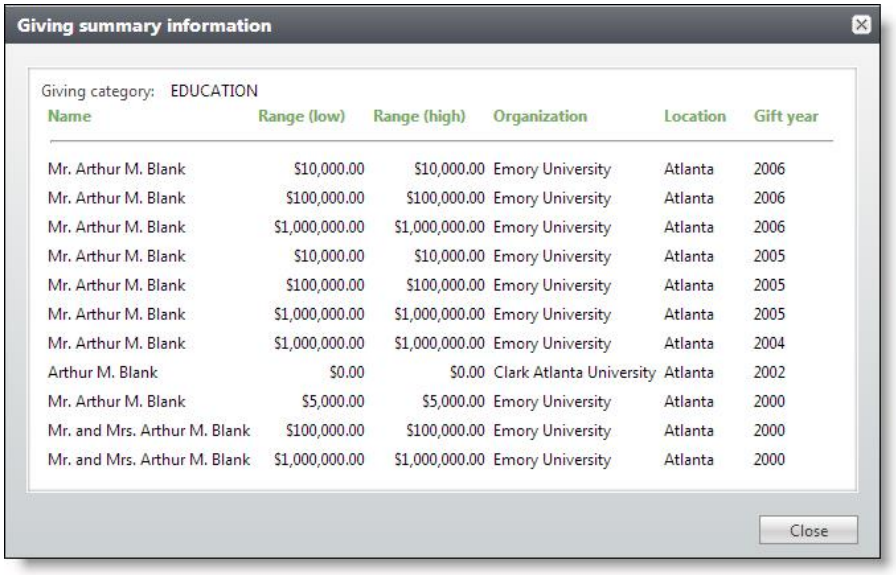
   Note: For instructions on how to customize the display tiles, see Customize search result tiles.

   - Full name
   - Addresses
   - Confirmed Wealth
   - Giving information
   - Real Estate data such as address information, value, and owner
   - Business data, such as business name, prospect's title, business value, and the prospect's ownership value
   - Securities
   - Demographic Models with information about household income and discretionary spending



2. Locate the result you want and:

   - Click **Show more** to display all information panels for this prospect.
   - If right and left arrows display next to a panel entry, such as **Addresses** or **Real Estate**, click the right arrow to move to the next record. Click the left to go back.
   - Click on the linked address in the **Real Estate** and **Businesses** panel to access details about the real estate and business located for this prospect.
   - Click on any link displayed in the **Giving** panel to access giving summary information. For example, if and Education link displays, click the link to view a giving summary of the prospect's donations to organizations associated with Education.



Name	Range (low)	Range (high)	Organization	Location	Gift year
Mr. Arthur M. Blank	$10,000.00	$10,000.00	Emory University	Atlanta	2006
Mr. Arthur M. Blank	$100,000.00	$100,000.00	Emory University	Atlanta	2006
Mr. Arthur M. Blank	$1,000,000.00	$1,000,000.00	Emory University	Atlanta	2006
Mr. Arthur M. Blank	$10,000.00	$10,000.00	Emory University	Atlanta	2005
Mr. Arthur M. Blank	$100,000.00	$100,000.00	Emory University	Atlanta	2005
Mr. Arthur M. Blank	$1,000,000.00	$1,000,000.00	Emory University	Atlanta	2005
Mr. Arthur M. Blank	$1,000,000.00	$1,000,000.00	Emory University	Atlanta	2004
Arthur M. Blank	$0.00	$0.00	Clark Atlanta University	Atlanta	2002
Mr. Arthur M. Blank	$5,000.00	$5,000.00	Emory University	Atlanta	2000
Mr. and Mrs. Arthur M. Blank	$100,000.00	$100,000.00	Emory University	Atlanta	2000
Mr. and Mrs. Arthur M. Blank	$1,000,000.00	$1,000,000.00	Emory University	Atlanta	2000

   - Click **Screen now** to add the new prospect to your database and run a wealth screen. The Add new individual screen displays. The fields included on this screen are consistent with Blackbaud's recommended best practices regarding prospect data.

i. If the prospect returns with several addresses, on the Add new individual screen, you can select which address should be the **Primary address**.

ii. If possible, also complete the **Spouse** and **Primary business** fields.

iii. At the bottom of the screen, select **Screen record on save**. A wealth screen is then run on this prospect before it is added to your database.

iv. When you click **Save**, the new prospect's Wealth and Ratings page displays.

v. Select the Biographical Information tab and expand the **Contact information** section. The address you selected as primary displays here with the "Primary" designation along with any other address information locate. The application can save up to five addresses.

Warning: A single gift associated with multiple giving categories displays in each category on the prospect's giving record. For example, if Amy Judd donates $10,000 to the Massachusetts Eye & Ear Infirmary and the gift is associated with two giving categories - "Religion Related, Spiritual Development" and "Youth Development," the gift displays twice on Amy's giving summary record - once for each category.

Research Lists

Research Lists help you more effectively research potential prospects. Research Lists are groups of constituents, and the list can be static or dynamic, depending on what you select when you create the list.

You can manually add or delete members from the group, or you can update groups using a selection created in *Query*. Researchers use these groups to locate prospects and determine the quantity, quality, and type of prospects available in their database.

Access Research Lists

You access the research list functionality from the Prospects page, in the **Research Lists** section, by clicking **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.

Research List Criteria Fields

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

Biographical Group Fields

List View Column	Category	Field Type	Note
Age Bio	Bio	#	
Any Business	Bio	Text	From name of organization relationship
Any Business City	Bio	Text	From address of organization relationship
Any Business Job Title	Bio	Text	From title of organization relationship
Any Business State	Bio	Text	From address of organization relationship
Any City	Bio	Text	From contact address
Any State	Bio	Text	From contact address
Any Zip	Bio	Text	From contact address
Constituencies	Bio	#	
Date added to system	Bio	Date	
First Name	Bio	Text	
Last Name	Bio	Text	
Last RE7 sync date	Bio	Date	Shows only if integrated with The Raiser's Edge 7
Primary Address	Bio	Text	Removed from original list
Primary Business	Bio	Text	
Primary Business City	Bio	Text	
Primary Business Job Title	Bio	Text	
Primary Business State	Bio	Text	
Primary City	Bio	Text	
Primary State	Bio	Text	
Primary Zip	Bio	Text	
Prospect Manager	Bio	Text	
RE7 linked?	Bio	Y/N	Shows only if integrated with The Raiser's Edge 7
Spouse	Bio	Text	

Educational Group Fields

List View Columns	Category	Field Type	Notes
Any Class of	Education	#	
Any College/School	Education	Text	
Any Degree	Education	Text	
Any Degree Type	Education	Text	
Any Department	Education	Text	
Any Division	Education	Text	
Any Education Institution	Education	Text	
Any Educational involvement	Education	Text	
Any Program	Education	Text	
Any Sub Department	Education	Text	
Primary Class of	Education	#	
Primary College/School	Education	Text	
Primary Degree	Education	Text	
Primary Degree Type	Education	Text	
Primary Department	Education	Text	
Primary Division	Education	Text	
Primary Education Institution	Education	Text	
Primary educational involvement	Education	Text	
Primary Program	Education	Text	
Primary Sub Department	Education	Text	

Giving Group Fields

List View Column	Category	Field Type	Notes
First Gift	Giving	$	
First gift date	Giving	Date	
First gift designation	Giving	Text	
First gift type	Giving	Text	
Largest gift	Giving	$	
Largest gift date	Giving	Date	
Largest gift designation	Giving	Text	

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

Rating Group Fields

List View Columns	Category	Field Type	Notes
Annual Giving Likelihood	Ratings	#	
Annuity Likelihood	Ratings	#	
Bequest Likelihood	Ratings	#	
CRT Likelihood	Ratings	#	
Major Giving Likelihood	Ratings	#	
Membership Likelihood	Ratings	#	
Online Giving Likelihood	Ratings	#	
Patient Response Likelihood	Ratings	#	
Planned Giving Likelihood	Ratings	#	
Suggested Membership Level	Ratings	$	

List View Columns	Category	Field Type	Notes
Suggested Membership Level Score	Ratings	#	
Target Gift Range	Ratings	$	
Target Gift Range Score	Ratings	#	

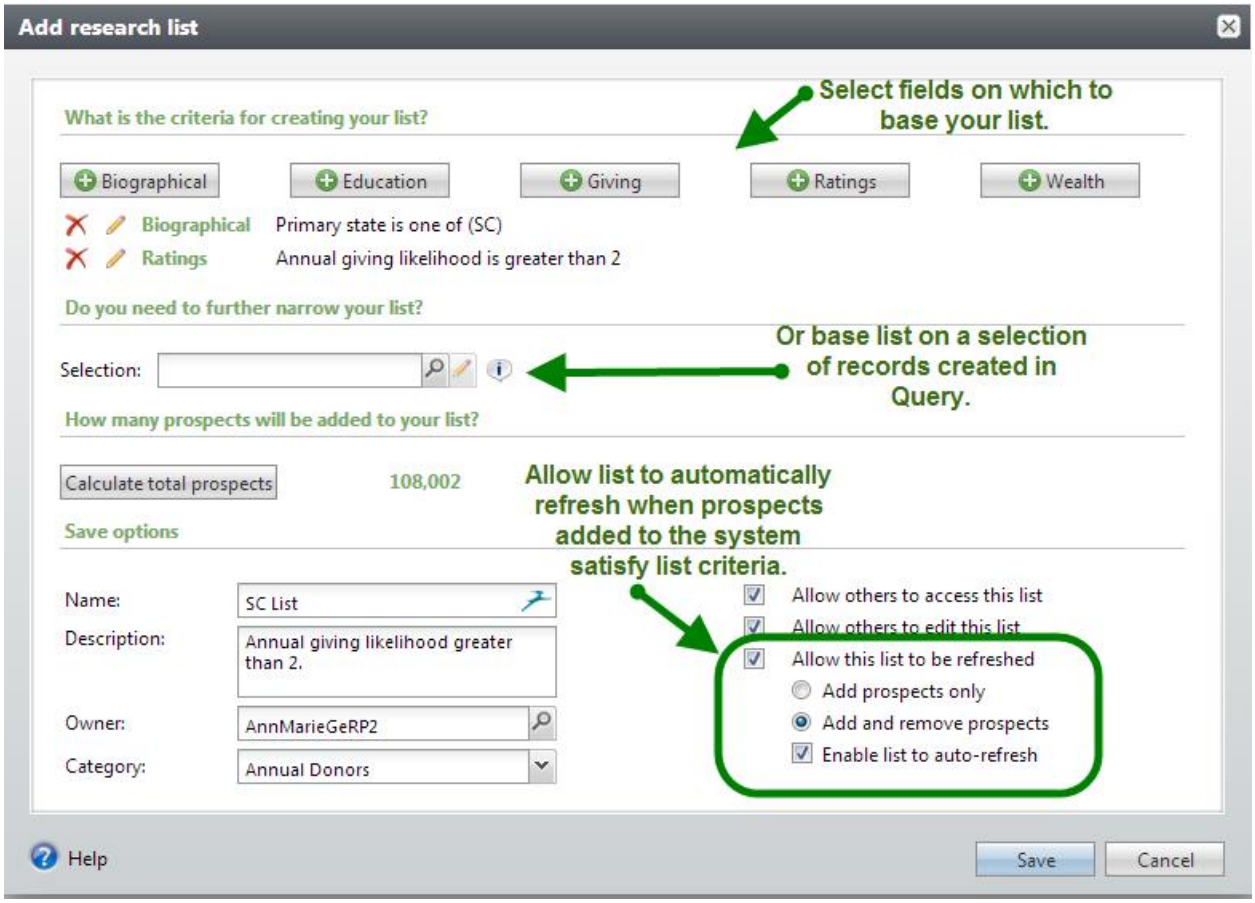
Wealth Group Fields

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

Add a Research List

When you add a Research List, you must select the criteria you want used to build your group. For example, you may want to include all prospects with a primary state of "SC" and an Annual giving likelihood greater than 2 - from the Add research list screen you can do this.

Or, if you would rather, you can also create your list from a selection that was created in *Query*.



Add a new prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **Add**. The Add research lists screen appears.
2. 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 9.

> ***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.

3. 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.

4. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
5. 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.

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

Edit a Research List

You can easily edit an existing Research List, changing:

- Criteria options
- Selection files
- Name, Description, and Category information
- Accessing permissions

You cannot, however, edit automatic 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 9.

   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. 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.

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

Delete a Research List

You can easily delete an existing Research List, permanently removing it from your system.

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.

Delete 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. In the Research Lists grid, expand the list you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to delete the group and return to the Research Lists page.

Open a Research List

Open an existing Research List

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

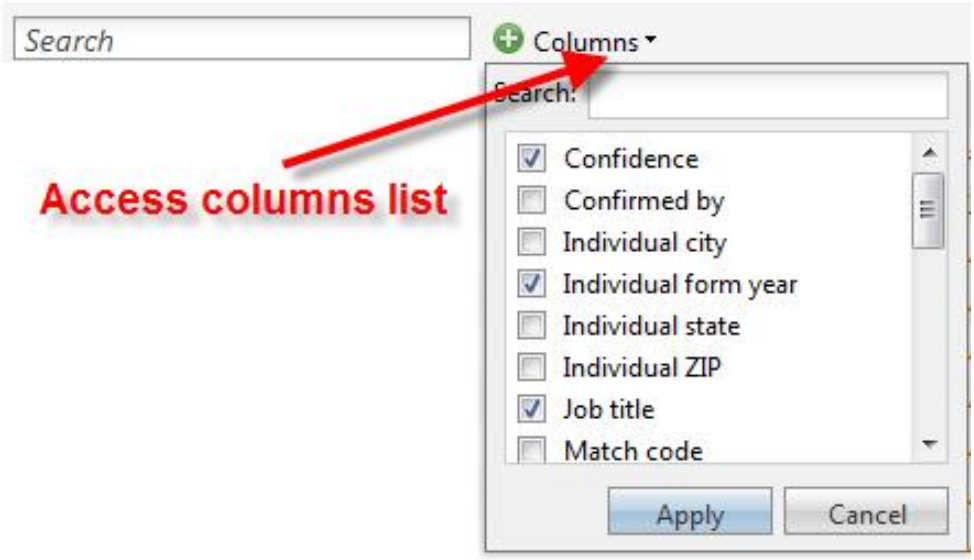
   Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.



2. From the Research Lists grid, in the **Name** column, click on the linked list name you wish to open. The selected research list appears.

Manage Columns Displayed in Grid

The powerful List Builder feature allows your to filter and customize information included in a grid's data lists. You can control the columns displayed in the data list grid by the drop-down button next to **Columns**.



A screen appears for you to select which columns to show and hide. Unselect any columns you do not want displayed and select those you do want to see in the grid. Click **Apply** and your changes display in the grid.

You can also:

- By dragging and dropping columns move them around so those you use most display front-and-center and those you don't often use are to the far right, accessed through a scroll bar
- 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:
    a. Hover your cursor on the column border until you see two parallel lines with an arrow on each side
    b. Click your mouse. The columns tighten up.
- To allow even more space to view your column settings, you can also collapse the Explore bar displayed on the left side of the application page
- To create columns of uniform size, click **Autosize all columns**, which is available under the **More** button.
- To sort the contents of a column, right-click on the column you want to sort, and select Sort ascending or Sort descending. From the right-click menu, you can also:
    - Clear filter settings
    - Edit filter settings
    - Modify columns selected to display

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, simply click the **Restore grid defaults**, which is available under the **More** button.

Use Search and Filter Features

- **Search** field: Quickly search for content included in the grid. The search is based on columns displayed, so make sure to open all columns you want to include before running the search.
- Filter options: Click on the filter icon included with each column head. A screen appears allowing you to enter your filtering criteria. If at any point you want to remove your filters, click the **Clear all filters** button at the top of the section. You can also click the red "X" that displays at the top of a filtered column if you want to remove filters from just that column. Finally, remember that the filters are sticky; they remain even after you move to another tab/record.

Manage Research List Records

From the research list record, you can:

- Add members to the list
- Edit the list, changing list criteria, selections used, and save options such as name and description
- Generate a Research List Report
- Delete the list
- Copy list members to another list
- Remove members
- And much more!

Track Members of your List

View members included in a research list

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

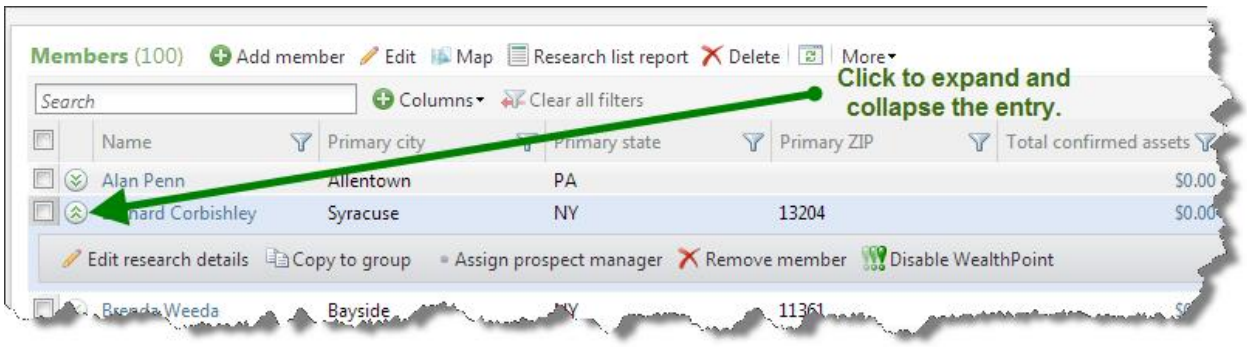
   Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. In the **Research Lists** grid, click on the list you want to open. The selected list opens. The **Members** grid displays all prospects assigned this list.

   Note: Options available in the **Members** grid are restricted based on user roles. If you do not see all options mentioned below, it is due to restrictions placed on your user role.

3. Expand a member entry to edit research details (such as research status and prospect manager), copy the prospect to another group, assign a prospect manger, delete the prospect from the list, or disable

WealthPoint screenings on this prospect.



For detailed instructions on filtering, searching, and arranging columns included in the Members grid, see Manage Columns Displayed in Grid on page 27.

Add Members to an Existing 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.

Add individual members to an existing 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. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. Click **Add member**. The Add research list member screen appears.
4. 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.
5. Once the new member has been selected or added, from the Add research list member screen, click **Select**. The new member is added to the group.

Delete Members from an Existing List

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

Delete members from an existing 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. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to remove from the list.
4. Click **Remove member**. A confirmation screen appears.
5. Click **Yes** to remove the member.

   OR

6. If you need to remove several members, in the **Members** grid, select the members you want to remove.
7. Near the top of the **Members** grid click **Remove member (number selected)**. A confirmation screen appears.

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

8. Click **Yes** to remove the selected members.

Copy a member from one list to another

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. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to copy.
4. Click **Copy to list**. The Copy prospects to list screen appears.
5. From here, you can select an existing research list to which to copy the member or you can create new list.
6. Click **Save**. The member is copied to the selected list. He also remains in the existing list.

   OR

7. If you need to copy several members to another list, in the **Members** grid, select the members you want to include.
8. Near the top of the **Members** grid click **Copy to list (number selected)**. The Copy prospects to list screen appears.
9. From here, you can select an existing research list to which to copy the member or you can create new list.
10. Click **Save**. The members are copied to the selected list. They also remains in the existing list.

View Members Prospect Records

If while working in a research list, you need to access a member's prospect record, you can easily do so. Once in the prospect record, you can make and save any necessary changes and return to the research list.

To open the record, click on the member's name in the **Name** column of the **Members** grid.

Research List Report

The Research List report allows 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 group member. In addition to the group 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

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. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.

   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**.

3. In the **Members** grid, click **Research list report**.

View list member's wealth summary Information

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

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. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.

3. In the **Members** grid, click the link in either the **Total confirmed assets** or **Total identified assets** column. The member's Wealth summary screen displays.

4. Click any assets or indicator link on this screen to access that specific information on the member's wealth and ratings page. For example, if you want to view this member's real estate information, you can click the **Real estate** link in the **Assets** column.

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

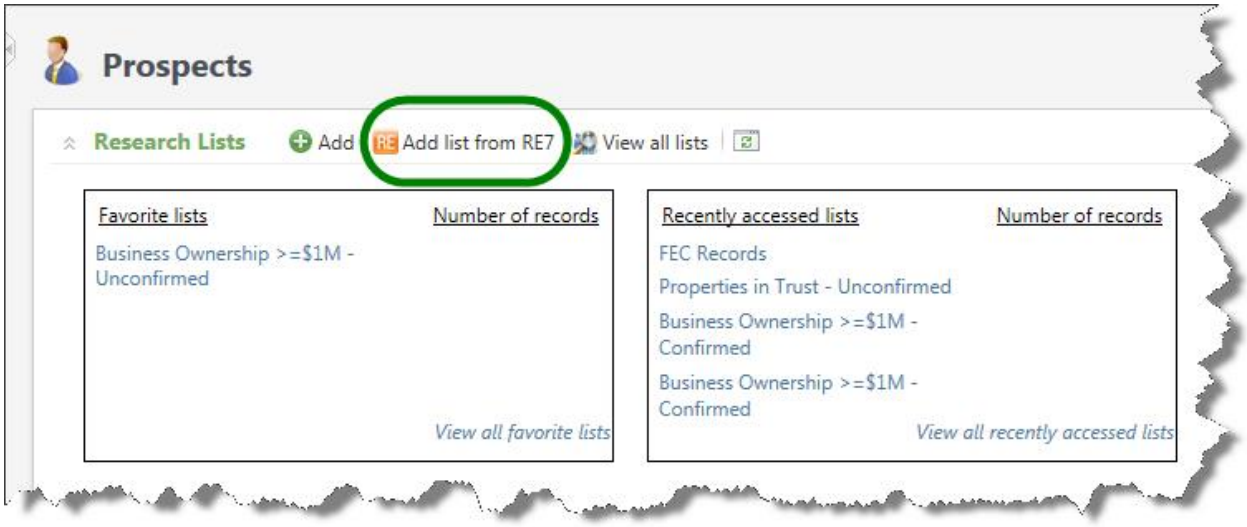
Import Research List from The Raiser's Edge

You can import ***Raiser's Edge*** query results into ***ResearchPoint*** lists.

When creating the ***Raiser's Edge*** query, make sure to include the system record ID as an output field. Any ***Raiser's Edge*** records that do not include a system ID do not import.

Import a Raiser's Edge query as a ResearchPoint Research List

1. From the top of the **Prospects** page, click **Add list from RE7**. The Open Query screen appears.



2. Locate the ***Raiser's Edge*** query you want to import.

   Note: You can also opt to create a new query from the Open Query search screen. For information about creating queries, see the Query chapter in the *Query and Export Guide*.

3. Click **Open**. The Import group to screen appears.



4. Select how you want ***ResearchPoint*** to process the query records.
   - To create a new Research List using the query records, select **New Research List**. You then must enter a name and description for the new group.
   - To add the query records to an existing Research List, select **Existing Research List**. In the **Name** field, select the name of the existing Research List to which you want the records added.

5. Click **OK**.
6. The application searches the query for any ***Raiser's Edge*** records already linked to ***ResearchPoint*** records. Linked constituents are automatically added to the group. Any unlinked constituent are displayed in a screen.



7. Determine how you want these records handled:
   - To add a record to the ***ResearchPoint*** database, select the record in the grid and click **Add**. This adds the selected constituent as a new record and creates a link back to the ***Raiser's Edge*** constituent record.
   - To search the ***ResearchPoint*** database for a match, select the record in the grid and click **Search**. The Search screen appears, allowing you to search for an existing matching record. If you find and select a match, the selected record is linked to the ***Raiser's Edge*** constituent record.
   - To add all records listed to the ***ResearchPoint*** database, select **Add all remaining records** and click **OK**. This adds all the remaining constituents as new records and creates links back to the ***Raiser's Edge*** constituent records.
   - To not add any of the remaining records, select **Ignore all remaining** and click **OK**.

Manage Member Integration with The Raiser's Edge

If your organization uses Blackbaud's ***The Raiser's Edge*** 7.84 or higher and the programs are integrated, you can sync records with ***The Raiser's Edge,*** and link and unlink records with ***The Raiser's Edge***.

Before you can use the ***Raiser's Edge*** features, your system must be integrated with a ***Raiser's Edge*** database and your credentials for the database must be entered.

Also, the ***Raiser's Edge*** integration features are role based. All roles except the Development Officer - View Only role allow access to the integration features.

Note: For more information about integrating with ***The Raiser's Edge***, see the *Raiser's Edge Integration Guide*.

Link Group Members with The Raiser's Edge

If you integrate **ResearchPoint** with ***The Raiser's Edge*** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases.

Link a group member with a Raiser's Edge constituent

Before you can link records, you must set up the ***Raiser's Edge*** integration functionality.

For information about configuring your system to integrate with ***The Raiser's Edge***, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to link.
4. Click **Link with RE7**.

Unlink Group Members from The Raiser's Edge

If you integrate ***ResearchPoint*** with ***The Raiser's Edge*** (7.84 or higher), you can link constituent records stored in the two program databases. If after linking constituents you discover an error or want to break the link for any reason, you can easily do so.

Unlink a group member from a Raiser's Edge constituent

Before you can link or unlink records, you must set up the ***Raiser's Edge*** integration functionality.

For information about configuring your system to integrate with ***The Raiser's Edge***, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to unlink.
4. Click **Unlink with RE7**.

Sync Group Members with The Raiser's Edge

If you integrate **ResearchPoint** with ***The Raiser's Edge*** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases.

Sync an individual group member with a Raiser's Edge constituent

Before you can link and sync records, you must set up the ***Raiser's Edge*** integration functionality.

For information about configuring your system to integrate with ***The Raiser's Edge***, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you

wish to open. The selected research list appears.

3. In the **Members** grid, expand the entry you want to sync.
4. Click **Sync with RE7**. The application syncs the records.

Sync Entire Group with The Raiser's Edge

If you integrate ***ResearchPoint*** with ***The Raiser's Edge*** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases. Using the **Sync with RE7** function, you can save time and sync all linked group members at once.

Note: For information about syncing one record at a time, see Sync Group Members with The Raiser's Edge on page 24; for information about linking records, see Link Group Members with The Raiser's Edge on page 23.

▶ **Sync entire group with Raiser's Edge constituents**

Before you can link and sync records, you must set up the ***Raiser's Edge*** integration functionality.

For information about configuring your system to integrate with ***The Raiser's Edge***, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. At the top of the **Members** grid, click **Sync with RE7**. The application syncs all linked records included in the group.

Wealth and Ratings Management

Wealth information is data used to track your prospect's estimated wealth. Knowing the types and amount of wealth your prospects possess allows you to better determine cultivation strategies and determine the prospect's giving potential.

From a prospect's Wealth and Ratings screen, you can track a variety of wealth-related information, such as real estate and stock holdings, pension, and salary. If you subscribe to ***WealthPoint***, the wealth screening solution from Target Analytics, you can also track imported ***WealthPoint*** data obtained by Target Analytics.

Tip: The **WealthPoint** service helps you identify your best major and planned gift prospects, attract and retain wealthy donors, maximize gifts, determine the wealth potential of your entire database, set reasonable campaign goals, and free up staff resources for person-to-person fundraising.

Note: For organizations, groups, and households, wealth information is arranged in the **Wealth summary** grid of the prospect's Wealth and Ratings screen.

For individual prospects, wealth information is arranged in a series of tabs that categorize the data collected.

- Affiliations tab: Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.
- Assets tab: Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.
- Biographical Information tab: Houses personal information, such as name, marital status, and gender; along with contact information, relationships, interests, and education.

- Giving tab: Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.
- Model Scores tab: Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which prospect will become a major donor.
- Wealth Summary tab: Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.

Access the Wealth and Ratings Screen

A prospect's Wealth and Ratings screen displays when you open the prospect's record.

1. From the Prospect's page, under **Prospect research**, click **Search**. The Search page displays.
2. Select the "Search in RP" option.
3. Enter the prospect's name/lookup ID or location.
4. Click **Search**. All available records in ***ResearchPoint*** satisfying your search criteria display.
5. Select the record you want to view by clicking **View RP**.
6. The prospect's Wealth and Ratings page displays.

Obtain Prospect Wealth Information

You can manually enter any wealth information you obtain about a prospect. Manually entering data simply involves locating the Wealth and Ratings page for an existing or a new prospect.

Warning: The ***WealthPoint*** search option is available for only individual constituents, not organizations, groups, or households.

The **Wealth summary** grid on this page displays links to all wealth information available. To manually enter data in any wealth category, click the link. For example, if you have real estate information you want to record, click the **Real estate** link in the **Assets** column.

If you subscribe to ***WealthPoint***, Blackbaud's wealth screening solution, you can import ***WealthPoint*** data. When importing ***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 from Mark Adamson and real estate information is included in the ***WealthPoint*** import, whatever information you entered about Mr. Adamson remains intact after the import. This is also true of any information you manually edited or deleted.

If data is found in a ***WealthPoint*** update, the information displays in the **Wealth summary** grid of the Wealth and Ratings screen. The **Assets** rows display the total amount of wealth located for each asset. This amount displays in the **Total identified** column. If "$0" is recorded in this column, it means the service located data but an associated dollar amount did not exist.

Warning: The number of prospects included in any group you intend to update must be less than or equal to the number of searches remaining in your organization's ***WealthPoint*** subscription.

Update individual prospect WealthPoint data

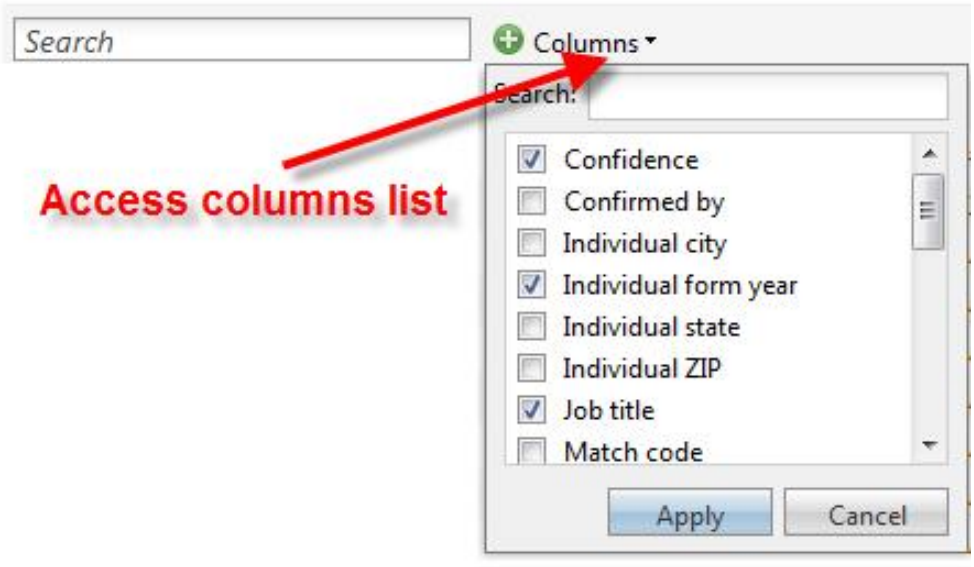
Warning: The ***WealthPoint*** search option is available for only individual constituents, not organizations, groups, or households.

There are couple ways to screen a prospect in ***ResearchPoint***.

- When running a search of the Target Analytics Prospecting database (the "Find new prospects" option), click **Screen now** in the results grid to add and screen any new prospects.
- For an existing record, open the record and from the top of the Wealth Summary tab on the Wealth and Ratings page, click **Get WealthPoint screening**.

Manage Columns Displayed in Grid

The powerful List Builder feature allows your to filter and customize information included in a grid's data lists. You can control the columns displayed in the data list grid by the drop-down button next to **Columns**.



A screen appears for you to select which columns to show and hide. Unselect any columns you do not want displayed and select those you do want to see in the grid. Click **Apply** and your changes display in the grid.

You can also:

- By dragging and dropping columns move them around so those you use most display front-and-center and those you don't often use are to the far right, accessed through a scroll bar
- 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:
    a. Hover your cursor on the column border until you see two parallel lines with an arrow on each side
    b. Click your mouse. The columns tighten up.
- To allow even more space to view your column settings, you can also collapse the Explore bar displayed on the left side of the application page
- To create columns of uniform size, click **Autosize all columns**, which is available under the **More** button.
- To sort the contents of a column, right-click on the column you want to sort, and select Sort ascending or Sort descending. From the right-click menu, you can also:

- Clear filter settings
- Edit filter settings
- Modify columns selected to display

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, simply click the **Restore grid defaults**, which is available under the **More** button.

Use Search and Filter Features

- **Search** field: Quickly search for content included in the grid. The search is based on columns displayed, so make sure to open all columns you want to include before running the search.
- Filter options: Click on the filter icon included with each column head. A screen appears allowing you to enter your filtering criteria. If at any point you want to remove your filters, click the **Clear all filters** button at the top of the section. You can also click the red "X" that displays at the top of a filtered column if you want to remove filters from just that column. Finally, remember that the filters are sticky; they remain even after you move to another tab/record.

Confidence Rating

Each wealth record, whether imported from ***WealthPoint*** or manually entered, displays a Confidence rating. It appears in the grid of the select data source page. For example, if you are looking at Securities data on the Assets tab, the **Confidence** rating column appears on the far right side of the **Securities** section.

Warning: The ***WealthPoint*** search option is available for only individual constituents, not organizations.

Note: Check icon = the information contained in the record has been confirmed as correct. Star = ***WealthPoint*** used a piece of information in the recursive matching process to help identify a better match. For example, it locates a good Securities record match. It then uses the name of the company included in that record to make a better business ownership record match.

The rating indicates the relative strength of the match. For example, if confidence in the wealth information provided is very high, the rating number is "4"; if confidence in the wealth information provided is low, the rating number is "1". The following table explains each default confidence rating.

Rating	Description
5	Confirmed record - any record confirmed in the application receives a 5 rating. You designate a record "Confirmed" by selecting the record and clicking the **Confirm** button. When you confirm a wealth information record, the **Confidence** number changes to "5" and a green check mark appears to the left of the selected entry.
4	Very high confidence
3	High confidence
2	Moderate confidence
1	Low confidence
0	Rejected record - any record rejected in the application receives a 0 rating. You designate a record "Rejected" by selecting the record and clicking the **Reject** button. When you reject a wealth information record, the **Confidence** number changes to "0" and a red icon appears to the left of the selected entry.

View Wealth Summary Information

An overview of all wealth information lives on the prospect's **Wealth Summary** tab. The tab appears when you open a prospect.

The Wealth summary section of the tab offers a summary of all the prospect's wealth information, such as real estate, securities, and political donations. This section is view-only, but if you do need to access an asset or indicator, simply click the link provided in the grid. For example, if you need to view stock holding information, click **Securities**.

View Giving Capacity Information

Giving capacity information lives on the prospect's **Wealth Summary** tab in the Giving capacity section. The tab appears when you open a prospect.

From the **Giving capacity** section, you can view

- Capacity formula used to determine giving capacity
- Estimated wealth data
- Major giving capacity information
- Overall rating

Prospect Status, Manager, Group Association, and Summary Information

Research detail information lives on the prospect's **Wealth Summary** tab in the **Research details** section. This tab appears when you open a prospect.

From the **Research details** section of the prospect's Wealth and Ratings page, you can track prospect status information, managers assigned prospects, research lists to which the prospect is associated, and any research summary data.

Model Scores and Ratings

A model score is an integrated analytics tool that identifies prospects most likely to give a gift to your organization. It helps your organization predict actions such as planned and recurring gifts, membership renewals, and what constituents will become major donors.

Models are scored on a range from 0-1000. Scores are determined by organization name, organization address and gift transaction file, demographic data, and public wealth data. Organizations can use Blackbaud's model scores, as well as create their own scores.

From a prospect's Wealth and Ratings screen, the Model Scores tabs display the **Model scores and ratings** list. In addition, the Wealth Summary tab displays the top seven scores under **Model scores and ratings**. To view all scores, click **View details**, and the Model Scores tab opens.

Note: If a constituent has no scores or ratings, the **Model scores and ratings** section does not appear on the Wealth Summary tab.

Prospect Asset Information

The Assets tab on a prospect's Wealth and Ratings screen houses information about the prospect's real estate, business, stock, and "other" assets. It also includes wealth indicator and income/compensation information.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Assets tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a summary of all data included on the tab. For example, total identified real estate, businesses, and securities holdings.

Also in the summary section on this page:

- Click any link in the **Wealth assets** grid and the application takes you to that section of the tab page. For example, if you want to view the real estate information, click **Real estate** in the summary section, and you are taken directly to the **Real estate** section on the tab.

The bottom half of the tab displays asset details, such as wealth indicators, income/compensation information, and stock holdings.

Real Estate Information

For individuals, the Real estate section of the Assets tab tracks all real estate holdings located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Real Estate page tracks all real estate holdings located for this prospect/household.

This section/page also stores information from the CoreLogic Data Services real estate data source imported from ***WealthPoint***.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Business Ownership Information

For individuals, the Businesses section of the Assets tab tracks all business ownership data located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Business page tracks all business ownership data located for this prospect/household.

This section/page displays the company value and the ownership value assigned your prospect. The section also stores information from the Dunn & Bradstreet data source imported from ***WealthPoint***.

WealthPoint leverages three files from D&B to provide you with data about the constituent's employer, position, career history, and compensation.

- Private Company Stock Ownership: This provides stock ownership information about private companies. With this information, you can see how much of a business your potential donor owns.
- Management Biographies: This source provides career history, compensation data, and stock information on more than 1,000,000 executives.
- Executives at Home: Private company owners and professionals make up over 75% of all millionaires. The Executives at Home file provides access to the names and addresses of 8,000,000 executives.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Securities

For individuals, the Securities section of the Assets tab tracks stock holdings located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Securities page tracks all stock holdings located for this prospect/household. The section also stores information from Thomson Financial imported from ***WealthPoint***.

The SEC Stock Information by Thomson Financial file includes stockholding information on public company officers, directors, and major shareholders. You are provided with the latest holdings, stock type, and type of ownership.

In addition, Target Analytics obtains stock prices from **BATS Exchange**, a securities trading company that provides up-to-date trade information at the close of each trading day. This updated data is reflected in the application whenever a new wealth search returns security information or a security transaction updates through a **Data Refresh**. The new price is included in the **Direct holdings value** and **Indirect holdings value** columns displayed on the Securities page. It is also included in the price information displayed in the **Details** pane of the Securities page.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Transaction Page

A prospect's transactions page lists all security transactions entered in the system, including the quantity of shares owned, transaction date, share price, transaction value and more. From the **Show** field on the page, you can filter the transactions displayed. After selecting a **Show** option, click **Apply** to update the view.

To access a transaction page, from the prospect's Wealth and Ratings screen, click **Securities** in the **Wealth summary** grid. The constituent's Securities page appears.

Note: For organizations, households, and groups click **Securities** in the **Wealth summary** section of the Wealth and Ratings screen.

In the grid, click the **Issuer name** entry for which you want to view transaction information.

Wealth Indicators

For individuals, the Wealth indicators section of the Assets tab tracks the prospect's general wealth indicators.

For example, the presence of luxury items like luxury automobiles, yachts, and private planes; or a high-balance personal retirement (Keogh) plan indicate wealth. The page also stores information from Larkspur imported from ***WealthPoint***.

Larkspur compiles wealth indicators from over 70 different data sources and isolates 3.4 million high net-worth individuals nationwide.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Income/Compensation

For individuals, the Income/Compensation page on a constituent tracks the constituent's salary, bonuses, stock options, etc.

For organizations, groups, and households, the Wealth and Ratings - Income/Compensation page tracks the prospect/household's salary, bonuses, stock options, etc. The page also stores information from MarketGuide by Reuters imported from ***WealthPoint***.

MarketGuide by Reuters provides comprehensive biographical and financial information on officers and directors of over 20,000 companies worldwide. Insider data includes officer and board of director names, biographies, compensation, and stock options for over 9,000 U.S. public companies.

At the top of the page, you can filter information to display by selecting a specific **Source**, **Confidence** rating, or **Match code**.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Other Assets

For individuals, the Other assets page on the constituent tracks additional constituent assets not covered in the standard data source options, such as a collector car or coin collection.

For organizations, groups, and households, the Wealth and Ratings - Other Assets page tracks additional prospect/household assets not covered in the standard data source options.

At the top of the page, you can filter information to display by selecting a specific **Source** or **Confidence** rating.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Prospect Giving Information

The Giving tab on a prospect's Wealth and Ratings screen, houses information about the prospect's giving to yours and other non-profit organizations.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Giving tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a summary of all data included on the tab. For example, you can view how many gifts were given to your organization.

Also in the summary section on this page:

- Click any link in the **Giving summary** grid and the application takes you to that section of the page. For example, if you want to view the gifts given to other organizations, click **Philanthropic gifts** in the summary section, and you are taken directly to the **Philanthropic gifts** section on the tab.
- View the **Philanthropic giving category breakdown** grid to see a percentage and number breakdown of this prospect's giving tendencies based on giving categories associated with the donations. You can filter the data considered for this breakdown based ratings assigned each gift. For example, you can select to include "Confirmed only" gifts or gifts with a rating of "1 and above." The percentage information displays to the left of the category title and the number of gifts displays to the right of the category title.

Giving-to-My-Organization Information

For individuals, the Giving to my organization section of the Giving tab tracks the prospect’s gifts to your organization.

Philanthropic Gift Information

For individuals, the Philanthropic gifts section of the Giving tab tracks all the prospect's charitable giving, including gift range and year information.

For organizations and households, the Wealth Details - Philanthropic page tracks all charitable giving located for this prospect/household. The section also stores information from NOZA, Inc. imported from ***WealthPoint***.

Note: An "*" in the **Name** field indicates the individual is deceased.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Political Donations

For individuals, the Political donations section of the Giving tab tracks all the prospect's political giving, including amount and year information.

For organizations, groups, and households, the Wealth and Ratings - Political Donations page tracks all political giving located for this prospect/household. The page also stores information from Federal Elections Commission imported from ***WealthPoint***.

The Federal Elections Commission database contains detailed information about 2,000,000 federal election contributions. This information includes the amount of the contribution and the recipient of the contribution.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Wealth Affiliations

The Affiliations tab on a prospect's Wealth and Ratings screen houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Affiliations tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a summary of all data included on the tab. For example, you can view how many affiliations have been identified for each affiliation type.

Also in the summary section on this page:

- Click any link in the **Affiliations summary** grid and the application takes you to that section of the tab page. For example, if you want to view the network connections included in this affiliations record, click **Network connections** in the summary section, and you are taken directly to the **Network connections** section near the bottom of the tab page.
- View the **Relationship Map** to track all relationships this constituent has with other constituents in your system.

The bottom half of the Affiliations tab displays affiliation details, such as non-profit and foundation affiliations.

Nonprofit Affiliations Information

For individuals, the Non-profit Affiliations section of the Affiliations tab tracks the prospect's relationship with nonprofit organizations.

For organizations, groups, and households, the Wealth and Ratings - Nonprofit Affiliations page tracks the prospect/household's relationships with nonprofit organizations.

It also stores information from GuideStar imported from ***WealthPoint***.

GuideStar scans the names of 220,000 nonprofit board members and executives from 275,000 organizations and extracts information such as nonprofit organization name, affiliation, and address of the donor.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Foundations

For individuals, the Foundation affiliations section of the Affiliations tab tracks the constituent's association with nonprofit foundations.

For organizations, groups, and households, the Wealth and Ratings - Foundation Affiliations page tracks the prospect/household's association with nonprofit foundations.

It also stores information from GuideStar.com imported from ***WealthPoint***.

GuideStar.com information includes the foundation name and address and total assets (fair market value) along with the constituent's title and compensation.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Network Connections

Network connections displays the names of organizations with a confirmed relationship with the prospect. If the individual is a constituent in your database, the name is italicized; if the individual is a constituent in your database and has a formal relationship with the selected constituent, the name is bold and italicized.

When you screen a prospect through ***WealthPoint***, the constituent information from your database is matched against businesses and organizations in the ***WealthPoint*** database that they may have an involvement with. After a record is matched, the application determines who else in the ***WealthPoint*** database the associated prospect may have relationships with. The application returns the organizational and individual relationships, which appear in the **Network connections** section of the prospect's Affiliations tab. These relationships can include people associated with the same nonprofit or foundation as board members, directors, or trustees; or business partners associated as colleagues or co-executives. Because of your relationship with the initial prospect, you may be able to add to your donor pool by reaching out to these extended relationships.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 27.

Constituencies

Constituencies define the affiliations your prospects have with your organization. A prospect can have multiple constituencies, and these relationships can start and end and overlap. For example, a prospect may first become a donor in your database and remain a donor for an undetermined length of time. The prospect may later become a volunteer for your organization but for only six months. You can use constituencies to define these relationships and group similar prospects in queries and reports.

To view the constituencies of a prospect, select the **Constituencies** section of the Affiliations tab on the prospect's Wealth and Ratings screen.

Biographical Information

Warning: Biographical information displays for only individual constituents, not organizations, groups, or households.

The Biographical Information tab on a prospect's Wealth and Ratings screen houses a wealth of personal information.

- Contact information: address, address type, do not send mail, this address is confidential, seasonal information
- Biographical data: information imported through WealthPoint from Marquis Who's Who
- Relationships
- Interests
- Educational institutions
- Educational involvements
- Attributes
- Supporting information: notes, media links, attachments
- Demographics: target gift range, income, birthplace, religion, ethnicity
- Alternate lookup IDs
- Aliases

Note: The Who's Who data source includes detailed biographical information on over 1,000,000 individuals. To obtain this information, Marquis matches the ***WealthPoint*** file against 20 volumes, including all regional publications: Who's Who in Finance & Industry, Who's Who of Emerging Leaders in America, and Who's Who in America.

View prospect biographical information imported from Marquis Who's Who

1. From the prospect's Wealth and Ratings page, select the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display.
3. Expand any record to view record details.

Reports

The **Reports** pane on the left side of the Wealth and Ratings page links you to all reports available in the program.

Warning: The **Prospect Research Report** is available for only individual constituents, not organizations.

Prospect Research Report

The **Prospect Research Report** provides details about a selected prospect's wealth information. To access the report, click the **Prospect research report** link under **Reports** on the prospect's Wealth and Ratings page. Once the Prospect Research Report page appears, use the grid at the top of the page to select what information you want to include in the report.

You can base your report on a selected **Confidence** rating and selected report template. To use only selected sections defined in your template, in the **Report template** field at the top of the report page, select the template you want to use.

Note: The **Print** functionality on this report is an activeX control that works only in ***Internet Explorer***. If working in another browser, export the report to a PDF to print.

Export a prospect research report to an outside application

1. Run the Prospect Research Report.
2. At the top of the report page, click the drop-down menu next to the **Export** icon.
3. Select the export option. For example, you can select "CVS" if you want to export to Excel or Acrobat (PDF) file.

Prospect Research Request Management

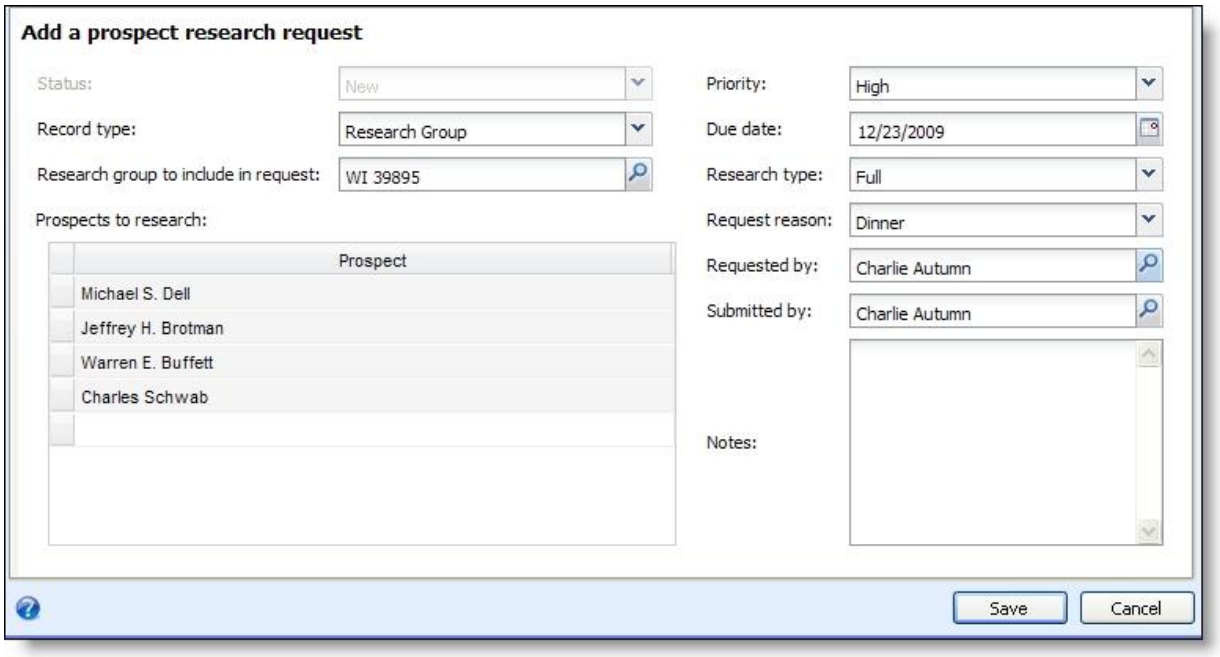
The prospect research request tools allow you to submit a prospect research request; designate the search for a specific record type (constituent, organization); enter request information such as priority, type of research, reason for request, and much more; and track the results.

Add New Prospect Research Requests

When you add a prospect research request, your request is submitted to a research officer for approval and completion.

Add a new prospect research request from the Prospect Research page

1. From the Prospect Research page, select the Research requests tab and click **Add** or from the Prospects page, under **Prospect research**, click **Add a prospect research request**.
2. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.



3. Select the **Record type** for which you are requesting information: Individual, Research List, or Organization.
4. Depending on the **Record type** selected, you next must select the individual, organization, or Research List for which you want information.

   Warning: The Individual, Research List, or Organization for which you are requesting information must exist in your database before you can create a prospect research request.

5. Enter any additional information required for the request, such as a priority, due date, and reason.

Add a Prospect Research Request Screen

Screen Item	Description
Status	If you are creating a new request, "New" defaults in this field and cannot be changed. After the request is saved, the status is changed to "Pending." This field displays the current status of your request and cannot be edited from the Research Request tool.
Record type	The available record types on which to base your request are. For example, a constituent or a Research List.
Research List to include in request	If in the **Record type** field you select Research List a new field appears. Select the group you want to research. All prospects included in the group display in the **Prospect names** grid. The number of constituents included in the grid is capped at 500.
Prospects to research	If in the **Record type** field you selected "Individual" or "Organization," in this field enter or search for the existing individual or organization constituent you want to include in your research request. Click the search icon in the field to access the search screen if you want to search for the constituent. You can enter multiple constituents in this grid. If in the **Record type** field you selected "Research List," the constituents included in the Research List populate the grid. To remove a constituent, select the constituent name and click **DELETE** on your keyboard.
Priority	Select a priority for the request. Priorities are created in **Code tables** in *Administration*.
Due date	Select a date by which you need the requested information. The default date is two weeks from the current date.

Screen Item	Description
Research Type	Select the type of information you need on the constituents. For example, “Full Profile” or “Financial Profile.” Types are created in **Code tables** in *Administration*.
Request Reason	Select a reason for the request. Reasons are created in **Code tables** in *Administration*.
Requested by/Submitted by	Enter or select the names of the individuals requesting the information. Click the search icon in the respective field to access the Constituent search screen. Both fields default to the constituent name linked to the application user entering the request, but the entries can be changed.
Notes	Enter any additional information you want to include with the request.
Copy research request information to linked individual requests	Select this option if you want linked individual requests to be updated to match the main request.

Manage Prospect Research Requests

Prospect research requests inform individuals in your organization responsible for prospect research that you need more information on a specific constituent or members of a Research List. The request form allows you to enter details including priority, reason, and notes to justify your request. Once the request is created and saved, the individuals responsible for prioritizing the requests can access and act upon the request. The individual responsible for submitting or requesting the research can track its progress from the Research Requests tab on the fundraiser record.

To access your fundraiser record, from Prospects, click **My fundraiser page**.

Edit an Existing Research Request

After you create and submit a research request, you can easily make any necessary changes to the request from the Research Request page. This page appears after you save a request or you can access it at any time from your fundraiser page.

To access the research request record, from the Prospects page, click **My fundraiser page** under **Prospect management**. Your Fundraiser page appears displaying all research requests associated with your record. To edit a record, expand the record you want to change, and click **Edit**. The Edit a prospect research request screen appears.

Note: Existing notes on individuals will not be overwritten.

Cancel an Existing Research Request

After you create and submit a request, you can cancel the entire request. This keeps the request in your system but changes the status to “Canceled.”

Warning: After you cancel a request, the cancel action cannot be undone.

To cancel an existing prospect research request, from the Prospects page, click **My fundraiser page** under **Prospect management**. Your Fundraiser page appears displaying all research requests associated with your record. Expand the record you want to cancel, and click **Cancel**. A confirmation screen appears. Select a **Reason** for canceling the request and enter any necessary **Comments**. Reasons are created in **Code tables** in *Administration.* Click **Save** to complete the process.

View Research Requests

After you submit a research request, the Research Request record appears. From this page you track activity on your request. After leaving this page, you can return to it through your fundraiser record.

From the Prospects page, click **My fundraiser page**. All requests you submitted or requested display in the **Research requests** grid. Click on the request you want to open.

From here, you can view the **Due date** and **Status** of your request.

Track Prospect Request Status

From the Prospects page, click **My fundraiser page**. All requests you submitted display in the **Research requests** grid. The request **Status** displays in the **Research request** grid next to the **Request ID**.

Export Research Requests

From the Prospects page, click **My prospect research page**. All requests you submitted display in the **Research requests** grid.

At the top of the page, click **More** and select your download option.

Prospect Analysis

Prospect Analysis tools can help Development Officers determine who and how much to ask for a gift. The prospect segmentation report is used to segment constituents in your database, identifying prospects that satisfy specified modeling scores or ratings and aiding in the development of a cultivation strategy for each segment created.

The prospect segmentation report's cross tab functionality shows all giving potential options held by your constituents. It places constituents in the report cell, which carries the highest matched rating range. In addition, a constituent can exist in multiple cells, if you design the report using two secondary variables. When this occurs, the constituent appears in the best of these possible cells. The cell with the best rating displays in the lower, right corner of the report.

Access Prospect Analysis

You access the **Prospect Analysis** functionality from the Prospects page by clicking **Prospect analysis** under **Research tools**. The Prospect analysis page appears displaying any existing prospect analysis definitions.

View a prospect analysis dashboard

1. From the Prospects page, click **Prospect analysis** under **Research tools**. The Prospect analysis page appears displaying any existing prospect analysis definitions.
2. From the Prospect Analysis page, in the **Prospect analysis dashboards** grid, select the dashboard you want to view.

Export a selected prospect analysis dashboard to another format

1. From the dashboard, at the top of the page, click the **Export** icon to access a drop-down menu.
2. Select your export format: CSV or XLSX.

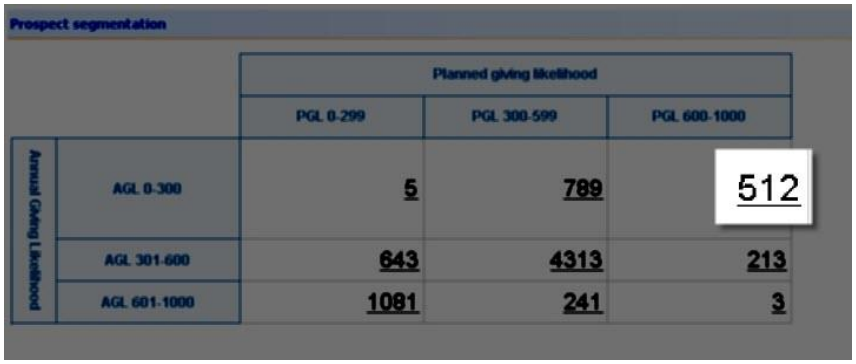
View Segment Page

A segment page displays the selected segment's properties; date, source, owner, and description information; and a list of the prospects included in the selected segment.

Access Segmentation Page

From a prospect segmentation dashboard, you can access a segment page for a selected segment in the dashboard.

For example, a segmentation dashboard includes a row for annual giving likelihood scores of 0-300 and an intersecting column for planned giving likelihood scores of 600-1000.



Click on the number included in this segment block to access the segment page displaying prospects satisfying the variable scores.

Open a prospect's constituent record from the Segment page

1. From the segmentation dashboard, open the segment page.
2. In the **Segment prospects** grid, in the **Name** column, select the prospect you want to open.

Target Analytics Model Scores and Ratings Results

On the Target Analytics Model Scores and Ratings Results page, you can view model score projects and presentations uploaded from Target Analytics. This page provides a comprehensive view of model scores and ratings details. A project consists of a model score or group of model scores accompanied by presentations and charts to help nonprofit organizations understand those scores.

You can view model scores and ratings details such as the number of constituents with scores, model score descriptions, and whether the scores were recalibrated. You can also view presentation files such as PowerPoint presentations.

To access the page, go to *Prospects* and click **Target Analytics model scores and ratings results**.



Prospect Research Report Templates

Prospect Research Report templates alllow you to create a template that defines exactly what you want to see in your selected report. You can then point the report to the saved template and generate the output you need.

The Prospect Research Report Templates page is accessed from ***Prospects***.

From this page, you can view all existing report templates, add new templates, edit existing templates, copy from an existing template to add a new template, and delete templates. Additionally, you can set which template you want to use as your default.

Add a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. Click **Add**.The Add prospect research report template screen appears.
3. Enter a name and description for your template.
4. From the **Available sections** pane select, and using the arrow keys, move the selections you want to include in your report to the **Selected sections** pane.
5. Click **Save** to save the template and return to Prospect Research Report Templates page.Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report.**

Edit a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. Select the template you want to change.
3. Click **Edit**.The Edit prospect research report template screen appears.
4. Make any necessary changes.
5. Click **Save** to save the template and return to Prospect Research Report Templates page.

Copy a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to copy.
3. Click **Copy**.The Copy prospect research report template screen appears.
4. Change the template name and description.
5. Make any other necessary changes.
6. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report.**

Delete a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to delete.

Warning: You cannot delete system templates.

3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to delete the selected template.
5. You return to Prospect Research Report Templates page. The deleted template no longer displays in the **Report templates** grid. In addition, you can no longer select this template when creating a **Prospect Research Report.**

Set a prospect research report default template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to use as your default.
3. Click **Set my default template**. Your selected template now displays a green checkmark in the **My default template** column of the **Report templates** grid.

Raiser's Edge Integration

Users of the standalone version of ***ResearchPoint*** (not integrated with Blackbaud's ***Constituent Record Management*** system) and ***The Raiser's Edge*** version 7.84 or higher can integrate the two applications and simplify constituent management duties between the two application databases. The integration feature links records included in both databases and synchronizes the information included on both records. You can also open ***Raiser's Edge*** records from ***ResearchPoint*** and ***ResearchPoint*** records from ***The Raiser's Edge***.

Warning: In some cases, values accepted in ***ResearchPoint*** as valid do not transfer to ***The Raiser's Edge*** due to field size limitations or some other limitation on the ***Raiser's Edge*** side. Any invalid values must be transferred as "0."

Requirements to Integrate

- ***The Raiser's Edge*** version 7.84 or higher
- **RE:Search** module included with your ***The Raiser's Edge*** install. This is an optional module in ***The Raiser's Edge***. If a constituent record in ***The Raiser's Edge*** displays a Prospects tab, you have **RE:Search**.

  If you do not have this module, you can still integrate with ***The Raiser's Edge***, but your capabilities are limited:

  - You can import data from ***The Raiser's Edge*** into ***ResearchPoint***
  - You can open a ***The Raiser's Edge*** constituent record from ***ResearchPoint***
  - You cannot send data from ***ResearchPoint*** to ***The Raiser's Edge***

Configuration Steps

1. Configure Raiser's Edge Integration on page 43
2. Configure Fields on page 45
3. Edit Credentials on page 48

Configure Raiser's Edge Integration

The configuration process allows you to seamlessly link and synchronize ***ResearchPoint*** and ***Raiser's Edge*** records.

Note: Raiser's Edge integration is supported on only *Internet Explorer* 8 and 9.

Configure ResearchPoint to integrate with The Raiser's Edge

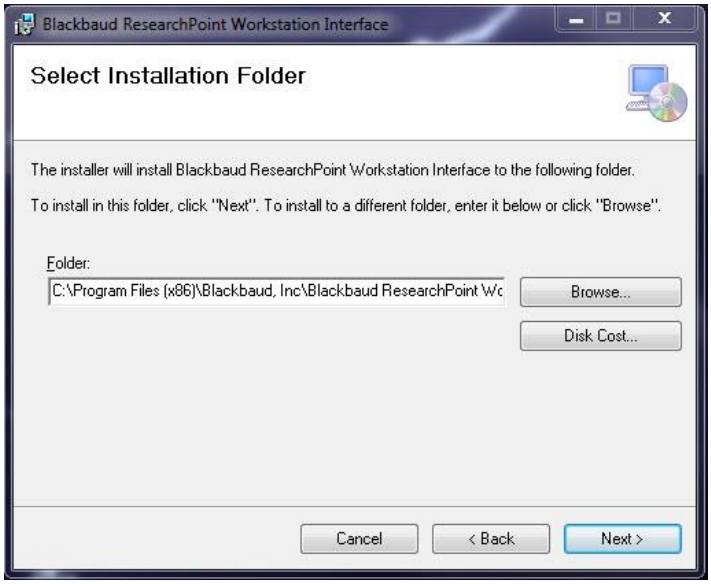
1. From the Prospects page in ***ResearchPoint***, under **Configuration**, click **The Raiser's Edge integration**. The Raiser's Edge Integration page appears.

   Warning: You can configure only one ***Raiser's Edge*** database with ***ResearchPoint***. Once configured, the selected database is locked in and cannot be switched out.

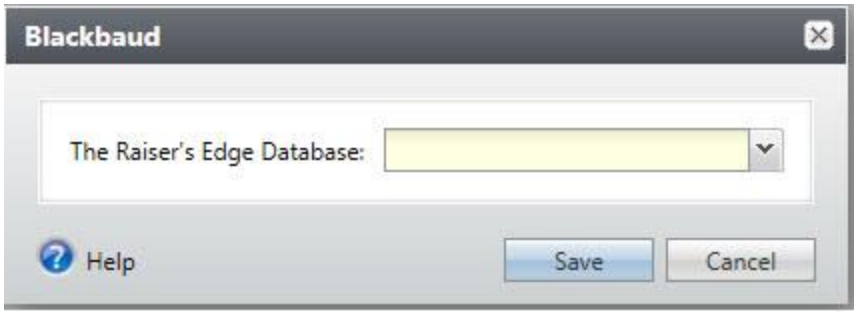
2. Under **Tasks**, click **Configure integration**. The Welcome to the Blackbaud ResearchPoint Workstation Interface Setup Wizard screen appears.

Note: An ActiveX control install may be necessary. If so, allow for the install by clicking the **Install** button on the warning message that displays at the top of your screen.

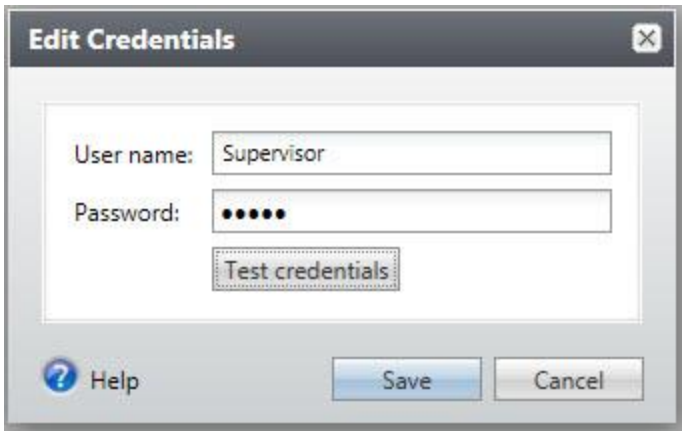
3. Click **Next**. The Select Installation Folder screen appears.



4. In the **Folder** field, enter the location you want the workstation interface installed. Click the **Browse** button to map to the location.
5. Click **Next**. The Confirm Installation screen appears.
6. Click **Next** to start the installation process. A screen appears tracking the install process. When the process is complete, the Installation Complete screen appears.
7. Click **Close** to exit the installation wizard. A form appears asking you to select The Raiser's Edge Database.



8. Click **The Raiser's Edge Database** drop-down menu and select the ***Raiser's Edge*** database you want to integrate with ***ResearchPoint***. You can integrate the application to only one ***Raiser's Edge*** database.
9. Click **Save.** You return to the The Raiser's Edge Integration page.
10. Once you select and saved a database, the **Edit Credentials** link on the page activates. Click this link and enter your ***Raiser's Edge*** login credentials.



11. Click **Save**. You return to the Raiser's Edge Integration page.

Configure Fields

The **Configure fields** functionality allows you to select the specific fields and data groups you want synchronized between the two programs. Only the fields and data groups selected are synchronized; all others are ignored in the process.

You can revisit **Configure fields** at any time to change your settings.

Note: You cannot configure fields until you complete the procedure in Configure Raiser's Edge Integration on page 43.

Configure fields to integrate

Note: If on the To The Raiser's Edge and From The Raiser's Edge tabs you unselect **Add data to The Raiser's Edge** and **Add data from The Raiser's Edge** be aware that the ***ResearchPoint*** search functionality can still bring ***Raiser's Edge*** data into ***ResearchPoint*** when you run a search of the ***Raiser's Edge*** database; however, if you choose to add the record to **ResearchPoint**, only data displayed on the search screen is saved to ***ResearchPoint***.

1. From the Prospects page in ***ResearchPoint***, under **Configuration**, click **The Raiser's Edge integration**. The The Raiser's Edge Integration page appears.
2. In the **Tasks** pane, click **Configure fields**. The Configure the Raiser's Edge integration fields screen appears.
3. To select the data fields you want written from ***ResearchPoint*** to ***The Raise's Edge*** during the synchronization process, on the To The Raiser's Edge tab mark **Add data to The Raiser's Edge**. The screen activates, and you can move fields listed in the **Available data fields** box into the **Selected data fields** box. All fields included in the **Selected data fields** box are included in the process.

   Warning: If you do not have the **RE:Search** module in your ***Raiser's Edge*** install, you cannot move data from ***ResearchPoint*** into ***The Raiser's Edge***. If this is the case, we recommend accepting the default settings on the To The Raiser's Edge tab. **RE:Search** is an optional module in ***The Raiser's Edge***. If a constituent record in ***The Raiser's Edge*** displays a Prospects tab, you have **RE:Search**.

   In the **Available data fields** list, the system does not send any data to ***The Raiser's Edge*** that has not been confirmed. Depending on your organization, you may not want to send wealth data at the initial configuration. If you have a researcher you may want to manually confirm data before sending it over to

The Raiser's Edge. If this is the case, it may be best to select just the "Modeling, likelihood and scores ratings" and move it into the ***Selected data fields*** list.

If you do want all confirmed values in ***The Raiser's Edge***, either system-confirmed or manually-confirmed, select all options in the **Available data fields** list and move them into the ***Selected data fields*** list.

Be aware, only confirmed Wealth and Ratings records are brought to ***The Raiser's Edge***.

For more information about the available fields, see Integrated Fields on page 46.

Note: The "fields" in ***ResearchPoint*** sent to ***The Raiser's Edge*** are individual pieces of data (Estimated wealth, Target Gift Range, etc.); however, the "fields" pulled from ***The Raiser's Edge*** into ***ResearchPoint*** are actually groups of data fields. For example, biographical information includes a number of fields: first name, last name, date of birth. Therefore the data titles are represented differently on the To The Raiser's Edge tab and the From The Raiser's Edge tab, one identifying "fields" and the other "groups".

4. To select the data groups you want written from ***The Raiser's Edge*** to ***ResearchPoint*** during the synchronization process, on the From The Raiser's Edge tab mark **Add data from The Raiser's Edge**. The screen activates, and you can move groups listed in the **Available data groups** box into the **Selected data groups** box. All groups included in the **Selected data groups** box are included in the process.

   You can move data from ***The Raiser's Edge*** to ***ResearchPoint*** with or without the optional **RE:Search** module.

5. Click **Save**. You return to the Configure Integration with The Raiser's Edge page. You are now ready to link and synchronize data. Next each user who will be working in both systems should enter his login credentials. If this information is not entered, the user will be prompted to enter the credentials every time ***ResearchPoint*** accesses ***The Raiser's Edge***. For more information, see Edit Credentials on page 48.

Integrated Fields

The following fields are integrated from ***ResearchPoint*** to ***The Raiser's Edge***.

Note: The "fields" in ***ResearchPoint*** sent to ***The Raiser's Edge*** are individual pieces of data (Estimated wealth, Target Gift Range, etc.); however, the "fields" pulled from ***The Raiser's Edge*** into ***ResearchPoint*** are actually groups of data fields. For example, biographical information includes a number of fields: first name, last name, date of birth. Therefore the data titles are represented differently on the To The Raiser's Edge tab and the From The Raiser's Edge tab, one identifying "fields" and the other "groups".

- Total Securities
- Overall rating
- Contributions
  - Contributions (refers to Political donations and philanthropic gifts)
- Total Real Estate Assets
- Estimated Wealth
- Total Other Assets
- Major Giving Capacity
- Modeling, Likelihood, and Score Ratings
  - Major Giving Likelihood
  - Annual Giving Likelihood

- Planned Giving Likelihood
- Target Gift Range

The following fields are integrated from ***The Raiser's Edge*** to ***ResearchPoint***.

- Biographical Information
  - First, Middle, Last name, Nickname
  - Date of Birth
  - Gender
  - Title1, Title2
  - Suffix1, Suffix2
  - RE7 constituent ID

Warning: When synchronizing records, if the Lookup ID on the ResearchPoint record differs from the constituent ID on the RE7 record to which you are linking, the RE7 constituent ID overrides the original Lookup ID and becomes the imported record's Lookup ID. The original Lookup ID is, however, saved and stored as an alternate Lookup ID with the type "'Original RP Lookup ID."

Warning: If an existing ResearchPoint record - a record other than the one included in the integration process - shares the Lookup ID equivalent to the constituent ID of the RE7 record included in the integration process, the synchronization process is unable to complete. A message notifies you of the conflict.

- Giving Summary
  - First Gift Amount/Date/Type/Fund
  - Largest Gift Amount/Date/Type/Fund
  - Latest Gift Amount/Date/Type/Fund
  - Total number of gifts
  - Total amount given
- Phone number

Note: If the ***Raiser's Edge*** constituent record has only one phone number entered, that number imports as the "Primary" number. If the ***Raiser's Edge*** constituent record has multiple phone numbers entered, all numbers are moved into ***ResearchPoint*** based on the following criteria: the "Home" phone number is designated "Primary;" if no "Home" number is located, the integration still pulls all numbers into ***ResearchPoint*** and the first number on the list is designated "Primary."

Warning: When integrating phone numbers, ***ResearchPoint*** pulls in only ***Phone types*** that have a ***Phone number type*** of "Telephone number." For example, "Fax number" and "Email address" are not pulled into ***ResearchPoint*** during the integration process

- Preferred Address Information
  - Address lines, City, State, ZIP, Country, Country abbreviation, and Address Type
- Primary Business Information
  - Primary Business Address: Address lines, City, State, ZIP, Country, Country abbreviation, and Address Type
  - Primary Business Name

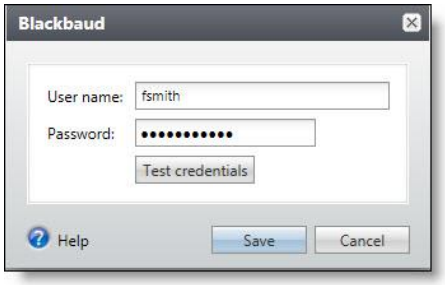
Edit Credentials

You must configure the ***Raiser's Edge*** integration before you can access the **Edit Credentials** functionality. For information about configuring your system, see Configure Raiser's Edge Integration on page 43.

On the screen accessed from this link, you enter your ***Raiser's Edge*** login credentials.

Enter Raiser's Edge credentials

1. From the Prospects page in ***ResearchPoint***, under **Configuration**, click **The Raiser's Edge integration**. The Raiser's Edge Integration page appears.
2. Click **Edit credentials**.



3. Enter your **Raiser's Edge** login information.
4. Click **Save**. You return to the Configure Integration with The Raiser's Edge page.

Search the Raiser's Edge

Once your application is configured to integrate with ***The Raiser's Edge***, you can search for records in your ***Raiser's Edge*** database without leaving ***ResearchPoint***. If matching records are located in both the ***Raiser's Edge*** and ***ResearchPoint*** databases, a link is created between the two records. This means any change made to the record in one database results in it also being updated in the other database.

Note: For information about configuring your application to integrate with ***The Raiser's Edge***, see Configure Raiser's Edge Integration on page 43.

Search/link a Raiser's Edge record with record in ResearchPoint

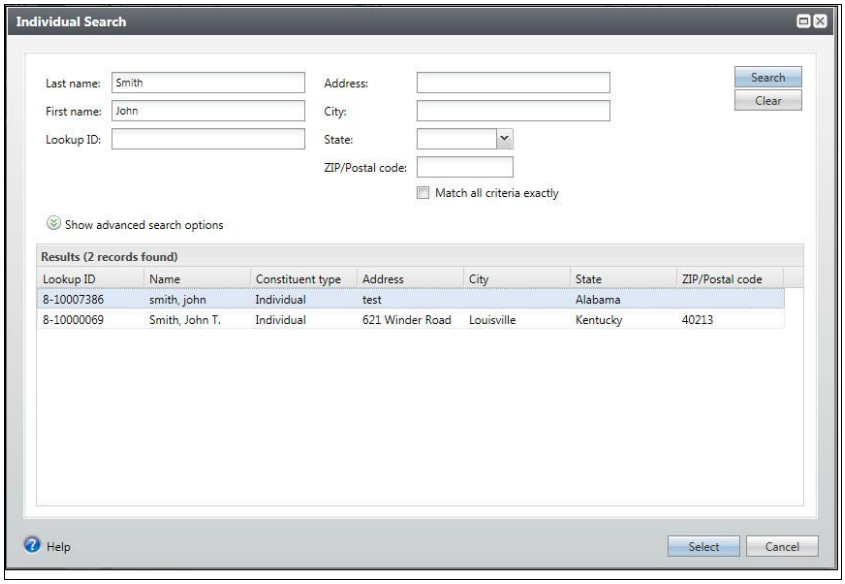
1. From the Prospects page in ***ResearchPoint***, under **Prospect research** click **Search** . An Search screen appears.

   Note: If the integration is configured to use the *Windows* authentication and ***The Raiser's Edge*** database does not use *Windows* authentication, the ***Raiser's Edge*** log in screen appears, and you must enter your ***Raiser's Edge*** **User name** and **Password**.

2. In the search drop-down menu, select "Raiser's Edge only".
3. In the Name or ID field, enter any name or ID information you have on the prospect.
4. In the Location field, enter any location information.
5. Click **Search**.

6. If the correct record is located, click **Open**. The Individual Search screen appears. This screen searches the ***ResearchPoint*** database for an existing record.

   Note: If no record or an incorrect record is located and you do not wish to link to it, click **Cancel** to end the process.



7. From the Individual Search screen, the search criteria you entered on the Open screen defaults. Enter additional search criteria if necessary and click **Search** to attempt to find a matching record in ***ResearchPoint***.

8. If the matching record is located, select it in the **Results** grid, and click **Select**. The records are now linked.

   If no matching record is located, click **Cancel**. A prompt appears asking if you would like to add this record to your ***ResearchPoint*** database. Click **Yes** to add the record.

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