Wealth Management Guide

09/27/2013 ResearchPoint 3.12 Wealth Management US

Contents

Wealth and Ratings Management

Wealth information [1] is data used to track your constituent's estimated wealth. Knowing the types and amount of wealth your constituents possess allows you to better determine cultivation strategies and determine the constituent's giving potential.

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

> ***Tip:*** The **WealthPoint** service helps you identify your best major and planned gift constituents, 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.

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[1] Data used to track your constituent's estimated wealth. Knowing the types and amount of wealth your constituents possess, allows you to better determine cultivation strategies and determine the constituent's giving potential.

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**[1].
- Assets tab: Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and **wealth indicators**[2].
- 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 constituent 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.

WealthPoint Searches

When ***WealthPoint*** searches its various data sources for wealth information about your selected constituents, the constituent fields listed below are used. Accurate and complete information in these fields results in more comprehensive and reliable search results.

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[1] A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.
[2] Other indicators located that tell you something about this constituent's wealth. For example, a membership in a millionaire club or tax assessor data.

- Constituent’s full name: Any combination. Consider entering middle name information if possible when you create a constituent record. The suffix field may also prove useful in the constituent matching process.
- Primary business: Even if you do not know the address, the company name may prove helpful
- Spouse: Any combination
- Phone numbers
- Address: Used in many matching formulas and required for real estate
- Birth date and spouse birth date

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**.

Disable/Enable Wealth Updates

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

If your database includes prospects whose wealth information you do not want updated during the ***WealthPoint*** update process, you can disable updates for the selected prospect. Once disabled, the record is not updated even if it is included in a selection of prospects on which a ***WealthPoint*** update is executed.

Disable Wealth Updates for a selected prospect

1. From the individual prospect's Wealth and Ratings screen select the Wealth Summary tab.
2. In the **Wealth summary** section, click **Disable wealth updates**.

   Note: Click the **Enable wealth updates** link to allow the constituent to once again receive wealth updates.

Link Raiser’s Edge Constituent

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 synchronize information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases.

Link a ResearchPoint constituent with a Raiser’s Edge constituent

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

1. From the **Tasks** pane on the constituent’s Wealth and Ratings screen, click **Link with RE**. The Raiser’s Edge constituent search screen appears. A number of the fields on this screen populate automatically, displaying information about the selected constituent.
2. If the program locates a potential match, the match appears in the grid. Select the record and click **Open**. The two records are linked, and you return to the Wealth and Ratings page. When the record is linked, in the **View as** pane of the Wealth and Ratings page, the **The Raiser’s Edge constituent** link appears.

   If no potential match is located, modify the search criteria and click **Find Now**. All ***Raiser’s Edge*** constituents satisfying the search criteria appear. Select the record and click **Open.** The two records are linked, and you return to the Wealth and Ratings page. When the record is linked, in the **View as** pane of the Wealth and Ratings page, the **The Raiser’s Edge constituent** link appears.

   If no match exists, click **Add New** from the Open screen. The New Individual screen appears. You can add the new constituent. The record links to the ***ResearchPoint*** constituent when you save the new record. When the record is linked, in the **View as** pane of the Wealth and Ratings page, the **The Raiser’s Edge constituent** link appears.

Unlink a Raiser's Edge constituent from a ResearchPoint constituent

1. From the constituent's Wealth and Ratings screen, under **Tasks**, click **Unlink with RE**.

View Raiser’s Edge Constituent

Once you link a ***ResearchPoint*** constituent to a ***Raiser’s Edge*** constituent you can access the constituent’s ***Raiser’s Edge*** record from the Wealth and Ratings screen of the linked ***ResearchPoint*** constituent. In the **Tasks** pane, click **View RE record**. The constituent’s ***Raiser’s Edge*** record opens.

For information about linking records, see Link Raiser’s Edge Constituent on page 4.

Sync with The Raiser's Edge

The ***Raiser's Edge*** integration feature allows you to link records included in both databases. Once the records are linked, the synchronization option included on the Wealth and Ratings screen - **Sync with RE** - activates, allowing you to synchronize the information included on both records.

The synchronization process is defined in Configure integration.

Note: For information about linking records, see Link Raiser's Edge Constituent on page 4.

TEST Link Tank

The **Link Tank**[1] window, nested in the right side of the Wealth and Ratings screen, provides links to popular online data resources. These resources are popular tools for prospect researchers. Housing the links within the application gives researchers quick access to sites like MarketWatch, Guidestar, and InvestorWords. The links open the web page in a separate window, allowing you to easily toggle between the application and the website. To toggle the window on and off, click **Link Tank** above the window on the right side of the page.

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**.

Manage Giving Capacity

You can enter wealth capacity information on your prospect records, tracking estimated wealth [2] and major giving capacity. You can also enter an overall wealth capacity rating.

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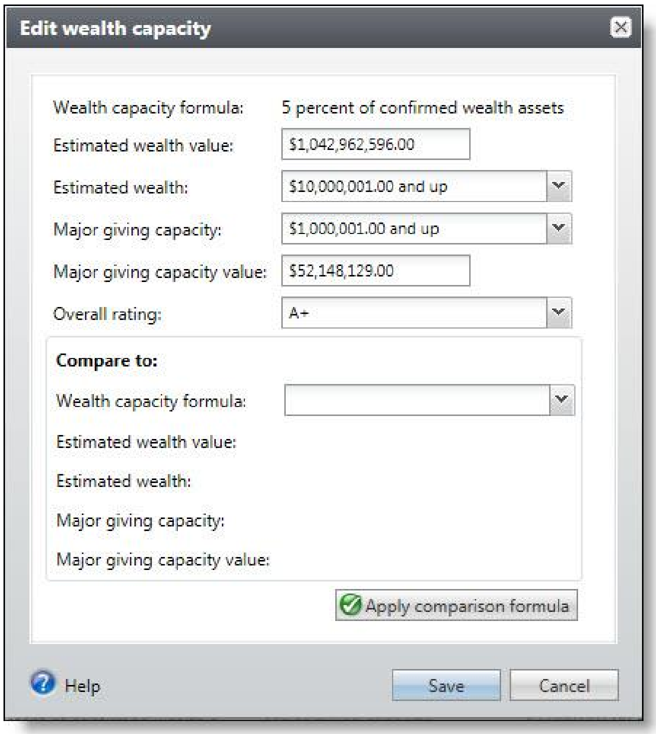
[2]A wealth capacity formula is used to determine a constituent's estimated wealth range. The system provides a default formula for calculating these ranges, but you may also choose to create additional formulas.

TheGiving capacity grid displays general information about the prospect's giving capacity including the formula used to determine the capacity. You create formulas in the Wealth capacity[1] **formula management** function, accessed from the **Configuration** section of the Prospects page.

Enter constituent wealth capacity information

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Giving Capacity** grid, click **Edit**. The Edit wealth capacity screen appears.



3. The **Wealth capacity**[2] **formula** field displays the formula used to determine the current wealth capacity.

   Note: You create formulas in the **Wealth capacity**[3] **formula management** function, accessed from the **Administration** pane on the Prospects page.

4. Enter the constituent's **Estimated wealth** dollar amount.
5. Select the constituent's **Estimated wealth** dollar range.

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[1]This grid displays general information about the prospect's wealth capacity including the formula used to determine the capacity. You create formulas in the Wealth capacity formula management function, accessed from the Administration pane on the Prospects page.

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[3]This grid displays general information about the prospect's wealth capacity including the formula used to determine the capacity. You create formulas in the Wealth capacity formula management function, accessed from the Administration pane on the Prospects page.

6. Select the constituent's **Major giving capacity** range.
7. Enter a specific **Major giving capacity value** based on your research for this constituent.
8. Enter an **Overall rating** for the constituent's wealth capacity. This is an internal rating determined by your organization.
9. In the **(Group) Wealth capacity[1] formula** field of the **Compare to** frame, select another formula to compare against the existing formula.
10. If you prefer the new formula ratings, click **Apply comparison formula** and the new formula is assigned to the constituent to determine wealth capacity.
11. Click **Save** to save the ratings information and return to the constituent's Wealth and Ratings page.

Confirm and lock constituent wealth capacity information

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Giving capacity** grid, click **Confirm and lock**. The application designates the entry "Confirmed and locked", disabling the **Edit** button.
3. To designate the entry "Unconfirmed", click the **Unconfirmed** button. The application designates the entry "Unconfirmed", activating the **Edit** button.

Model Scores and Ratings

The Model Scores tab on a prospect;s Wealth and Ratings page houses model scores and ratings information. 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.

Also, all Experian Demographic Models located during a prospect search are added to the Model Scores tab. From here, you can view, edit, and delete the information

For more information on how to create scores, see Create Customized Ratings on page 9

Only non-Blackbaud scores can be edited or deleted.

Note: Not all model score descriptions follow the 0-1000 score format. Exceptions include Target Gift Range, Principal Giving Solution, and Membership Target Gift Range.

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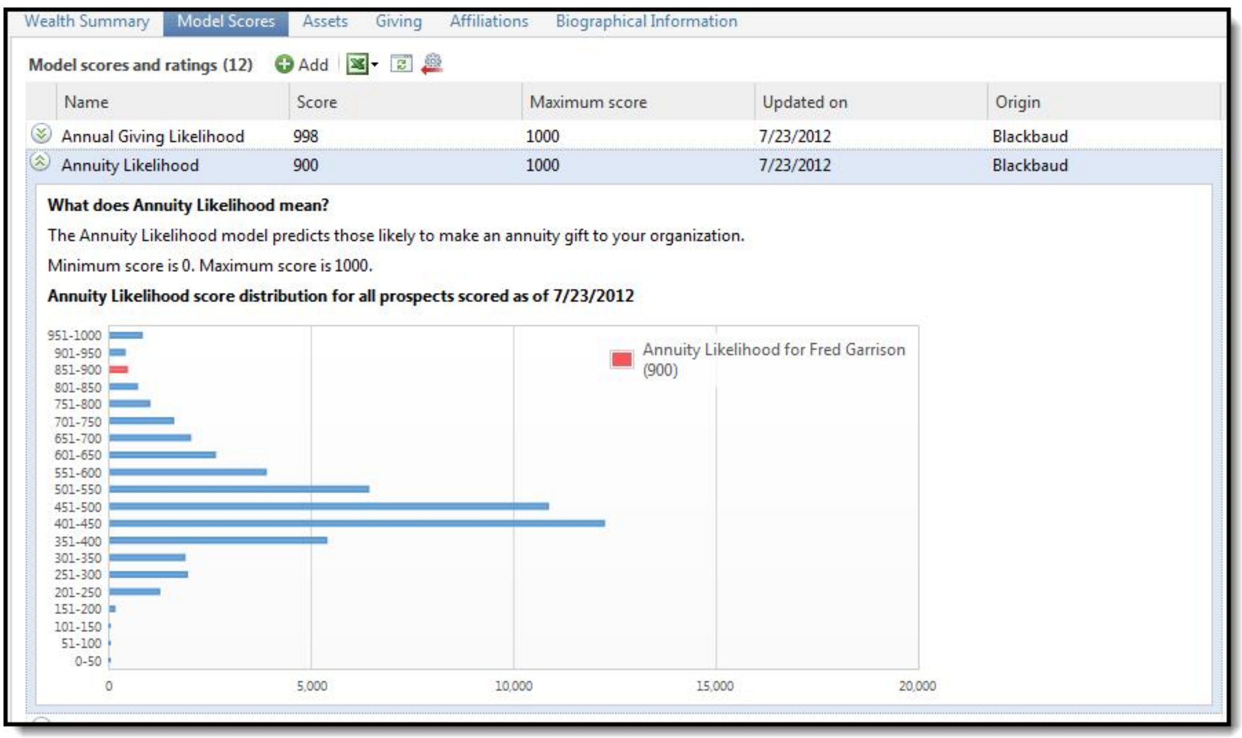
From a prospect's Wealth and Ratings screen, the Model Scores tabs display the **Model scores and ratings** list. In addition, the Wealth Summary tab displays the top seven scores under **Model scores and ratings**. To view all scores, click **View details**, and the Model Scores tab opens.

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

Distribution View

Target Analytics displays a bar graph in a model score's expanded view on the Model Scores tab for any project where a distribution file can show how a prospect compares to other scores in the same delivery. The graph displays the number of prospects on the x-axis and score values on the y-axis. Users with the appropriate administrative rights add distribution files on the Manage Model Scores and Ratings page.



Model Score Descriptions

Several Blackbaud model scores are available. The **Model scores and ratings** list displays the name of the score, the score along with the maximum possible score, and when the score was last updated. The **Origin** column displays whether the score is from a Blackbaud model or custom-made rating. New models may also be displayed as custom.

The following table defines current Blackbaud model scores:

Description Name	Explanation
Annual Gift Likelihood	Predicts how likely a donor is to make an annual gift of any size.
Major Gift Likelihood	Predicts how likely a donor is to make a major gift.
Target Gift Range	Predicts the amount the donor is capable of giving over a 12-month period.
Mid-Level Gift Likelihood	Predicts how likely a donor is to make a mid-level gift.
Planned Gift Likelihood	Predicts how likely a donor is to make a planned gift.
Annuity Likelihood	Predicts how likely a donor is to make an annuity gift.
CRT Likelihood	Predicts how likely a donor is to make a charitable remainder trust gift.
Likelihood to Give	Predicts how likely a donor is to donate and respond to your appeals.
Principal Giving Solution	Predicts how likely a donor is to make principal gifts.
Bequest Likelihood	Predicts how likely a donor is to make a bequest gift.
Alumni Engagement Likelihood	Predicts which alumni are likely to become engaged supporters, as defined by your university.
Membership Likelihood	Predicts those likely to make a membership gift.
Membership Target Gift Range	Predicts membership a donor is capable of purchasing in a 12-month period.

Manage Constituent Modeling and Ratings Data

You can track a constituent's likelihood to give using either the ***WealthPoint*** system imported with your ***WealthPoint*** data or your own internal ratings information. This information is stored on the specific constituent record.

Create Customized Ratings

To create your own ratings system, you must first add "Model Scores and Ratings" attribute categories. This is done through the **Attribute Categories** feature available in *Administration*. Once the categories are in place, you can enter the attribute category, say "Major Gift", on the constituent record and then assign a rating value, letting your users know what the chances are for your organization to win a Major Gift from the constituent. If you imported the ***WealthPoint*** system into the application, you can also edit the default entries, to better meet your specific needs.

Create Model attribute categories

1. Click *Administration*.

2. Under **Data** on the Administration page, click **Attribute categories**. The **Attribute Categories**[1] page appears.
3. Click **Add**. The Add attribute category screen appears.
4. Enter a **Name** for your new attribute category.
5. In the **Record type** field, select “Model Scores and Ratings.”
6. Select a **Data type**. For example, if you use numbers to rate data, select “Number.”
7. To further define attribute categories, you can create attribute groups and assign the category to a group. For example, you can create an attribute group called "Outside Interests" that includes attribute categories of Athletics and Arts.
8. To limit the attribute category to one per record, select the **Allow only one per record** checkbox. If you select the checkbox and a user tries to use the category multiple times on a record, an error message explains the restriction.

   Note: For detailed instructions about working in **Attribute Categories**[2], see the **Attribute Categories**[3] chapter in the *Administration Guide*.

9. Click **Save** to save the new attribute category and return to the **Attribute Categories**[4] page.

   The new category appears as an option on the Add model scores and ratings attribute screen in the **Scores & ratings** feature included on a prospect's Wealth Summary tab.

Add Rating Information to Constituent

If your organization uses a likelihood-to-give ratings model to track constituents and their likeliness to make a gift, you can enter this information on individual constituent records. The ratings are based on attribute

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[1]From Administration, you create the attribute categories available to users in the program. Users can assign any necessary values to these categories. For example, if a constituent is a gourmet cook and a cyclist, a user can enter each activity in the constituent’s record with an attribute category of Hobbies. This helps keep attributes neatly organized and helps with reports and queries. To enable users to enter attributes when they add or edit information throughout the program, you can use form extensions. With form extensions, you can add a tab or section for users to enter attribute information on applicable forms and pages that otherwise do not include fields for attributes.

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categories. You create attribute categories using **Attribute Categories** in *Administration*. Once you create the attribute category in *Administration*, you can assign the category and a ratings value using the **Add** option available on the Model scores and ratings screen.

For example, your likelihood-to-give categories are Major Gift, Planned Gift, and One-time Gift; and the values used to rate each category are A1 - highly, A2 - somewhat, A3 - not very, and A4 - not at all. Using **Attribute Categories** in *Administration* you can create attribute categories for Major Gift, Planned Gift, and One-time Gift. From the constituent's Model scores and ratings screen, you can then assign the attribute category and enter the appropriate rating value: A1 - highly, A2 - somewhat, A3 - not very, and A4 - not at all.

Note: For more information about creating modeling and ratings data, see Create Customized Ratings on page 9.

Add model scores and ratings to a prospect

1. From the prospect's Wealth and Ratings screen, click the Model Scores tab.
2. On the Model Scores tab, click **Add.** The Add a model scores and ratings attribute screen appears.
3. In the **Category** field, select a ratings category. You create your ratings attribute categories in **Manage Attribute Categories**[1] in Administration.

Note: For information about creating attributes, see Create Customized Ratings on page 160 or the **Attribute Categories**[2] chapter in the Administration Guide. Also, when creating your rating attribute categories, make sure to select the "Model Scores and Ratings" **Record type** on the Attribute category screen in **Manage Attribute Categories**[3].

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4. Enter a **Value** to rate the constituent's likelihood to give. The value allowed is determined by the **Date type** associated with the selected attribute category. For example, if the selected **Category** allows for "number" data types, only numbers can be entered in the **Value** field.
5. Enter a **Start date** for the value. For example, the date the rating information was acquired.
6. If necessary enter an **End date** for the value. For example if the value is reliable for just one year, enter the date it will expire.
7. Enter any **Comment** you want to include with the rating information.
8. Click **Save** to save the ratings information and return to the Model Scores and Ratings screen. The information you added appears in the **Model scores and ratings** grid.

Edit Rating Information on a Constituent

If your organization uses a likelihood-to-give ratings model to track constituents and their likeliness to make a gift, you can enter this information on individual constituent records. If after entering this information, you discover changes need to be made, you can easily enter your edits.

Edit likelihood-to-give rating information on a prospect

For information about using the import/batch functions to run bulk updates, see Model Score Updates through Batch Entry on page 13.

1. From the prospect's Wealth and Ratings screen, click the Model Scores tab.
2. In the **Model scores and ratings** grid, expand the entry you want to edit.
3. Click **Edit**. The Edit a model scores and ratings attribute screen appears.
4. In the Category field, select a ratings category. You create your ratings attribute categories in **Manage Attribute Categories**[1] in *Administration*.

> ***Note:*** For information about creating attributes, see Create Customized Ratings on page 9 or the **Attribute Categories**[2] chapter in the *Administration Guide*. Also, when creating your rating attribute

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categories, make sure to select the “Model Scores and Ratings” **Record type** on the Attribute category screen in **Manage** Attribute Categories[1].

5. Enter a **Value** to rate the constituent’s likelihood to give.
6. Select a **Start date** and **End date**.
7. Enter any **Comment** you want to include with the rating information.
8. Click **Save** to save the ratings information and return to the Model scores and ratings screen. The information you edited appears in the **Model scores and ratings** grid.

Delete Rating Information from a Constituent

If your organization uses a likelihood-to-give ratings model to track constituents and their likeliness to make a gift, you can enter this information on individual constituent records. If after entering this information, you discover the information to be no longer valid, you can easily remove it from the constituent.

Delete likelihood-to-give rating information from a constituent

1. From the prospect's Wealth and Ratings screen, click the Model Scores tab.
2. In the **Model scores and rating** grid, expand the entry you want to remove.
3. Click **Delete**.

Model Score Updates through Batch Entry

Batch Entry allows you to update and add information to your database quickly, without opening each affected record. There are two ways to use **Batch Entry** to enter data:

- The **Import** and **Batch Entry** functions help you to quickly add information contained in an outside application, such as Microsoft *Excel*, to your database (the outside file must be saved as a comma-separated value (*.csv) file). With **Import** you can create an import process that generates a batch file containing all information included in the outside file. From **Batch Entry** you can then validate and commit the batch file and add or update information in your database.

  For example, you have several revised modeling scores for a group of constituents that you need to import into the system. After you have your data in a CSV file format, you can import the information into the database. The import is based on a batch template created in **Batch Entry**. In the batch template, you select the batch type and workflow you want used when data is imported.
- If you do not have an import file, but you want to enter updated information quickly, without opening every record, you can use the batch process. With a batch, the program lists the selected fields (fields included in the batch template) as fields in a spreadsheet so you can efficiently enter information in the database. Like the import process, the batch requires a batch template, which specifies the fields to add or update.

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Note: For information about working in **Batch Entry**, see the Batch Entry chapter in *Data Management*; for information about working in **Import**, see the Import chapter in *Data Management*.

The following **Batch type** is available when you create a model score batch template:

- **Model Score Update Batch**: Updates constituent model score data based on information included in the import file or batch. When using import, the process compares a record ID included in the import file to system lookup IDs and alternate lookup IDs. During the import process, if the application finds a match in the database, the information in the matched record is updated.

Tip: When creating the import, on the Map fields tab of the Add import process screen, map the import ID to the **Constituent** field. Also, on the Set options tab, select the Other tab and under **Search list fields** select the **Quick find** option.

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**.

Batches for Model Scores

You can use batches to link model scores and projects with the Model Scores and Ratings Batch and Model Scores and Ratings Update Batch template.

From Constituents, click **Batch entry** under Maintenance. On the Batch Entry page, click **Add**. The Add a batch screen appears. In the **Batch template** field, select Model Scores and Ratings Batch or Model Scores and Ratings Update Batch. Click **Field options**and associate the batch with a model score under Available field options. Use the arrow icons to add fields to your batch.

> ***Note:*** By default, scores are -1 in batches. You can update model scores to any value between 0-1000. You cannot change a score back to -1 after setting the score field to a value in that range.

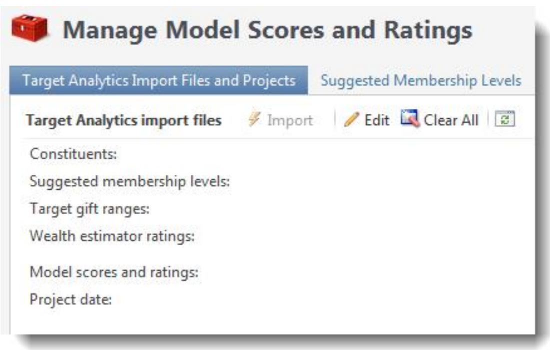
For more information on Batch Entry, see Model Score Updates through Batch Entry on page 13, and the *Batch and Import Guide*.

Edit Target Analytics Import Files

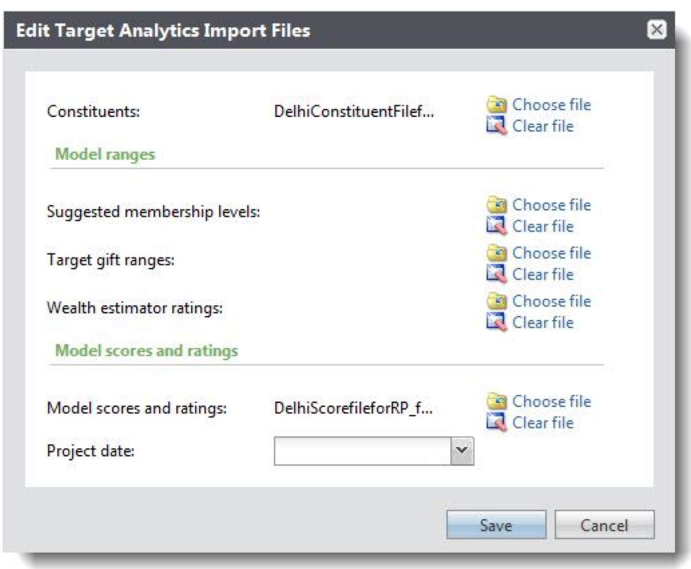
From the Manage Model Scores and Ratings page, users with proper administration rights can click on the Target Analytics Import Files and Projects tab to import and edit projects. If a project was used and the new scores are not from the same data set, you can create a new project. For instance, if a project was created more than seven days ago, you will be instructed to make a new project.

> ***Note:*** You must create a project when you add any built-in scores. However, when you only add values for attributes, this requirement does not apply.

To edit a Target Analytics import file, click **Edit** on the Target Analytics Import Files and Projects tab.



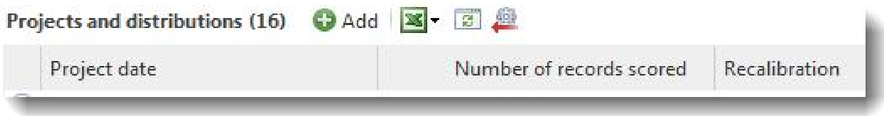
On the Edit Target Analytics Import Files screen, you can import files to Suggested membership levels, Target gift ranges, and Wealth estimator ratings. In the **Project date** field, select a project to associate with your model scores. A project date is required if your import file contains Blackbaud model scores and ratings.



Note: If you select a project that has been associated with imported model scores and ratings, you will be asked to add a project to associate with your model scores and ratings.

Projects, Distributions and Presentations

On the Manage Model Scores and Ratings tab, users with proper administration rights can create and edit model scores and ratings projects on the Target Analytics Import Files and Projects tab. You can also view distribution and presentation files uploaded by Target Analytics statisticians.

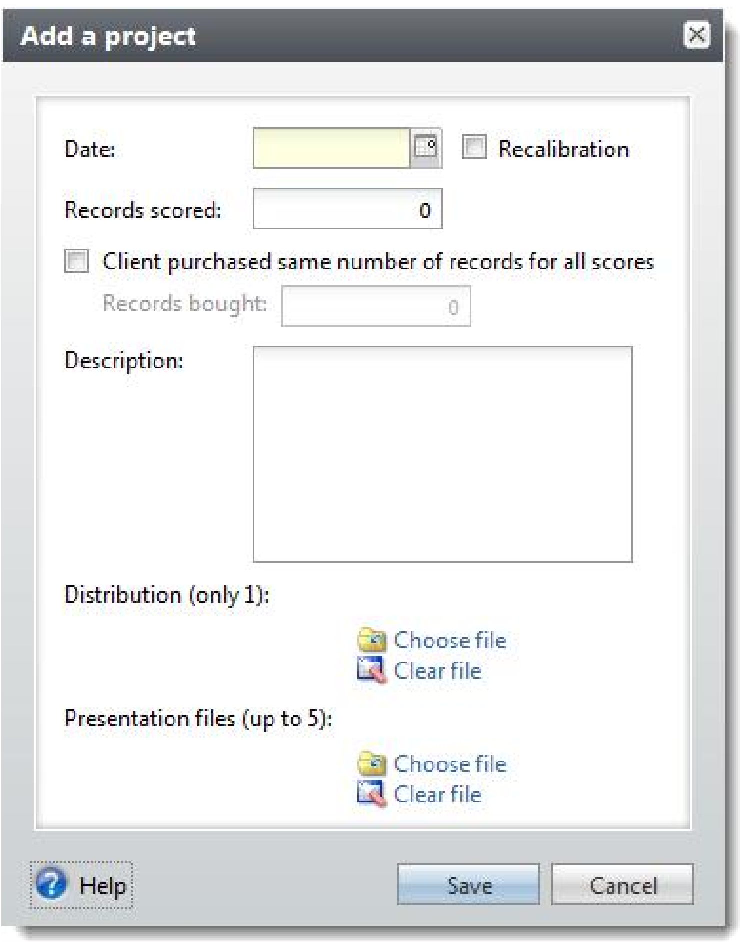


To create a project, click **Add**. The Projects and distributions grid displays project dates, the number of constituents with scores, and whether or not a project is considered a recalibration.

Expanding a row by clicking the arrow icon allows you to edit or delete a project.

Add a project

1. Under **Projects, distributions, and presentations** on the Target Analytics Import Files and Projects tab on the Manage Model Scores and Ratings page, click **Add**. The Add a project page appears.



2. In the **Date** field, select a date for the project. A date is required for every project.

Note: If a project has a date, but no presentations and no other fields specified, it will not appear on the **Target Analytics model scores and ratings results** page.

3. In the **Recalibration** checkbox, indicate if the project is a model score recalibration and will score new records in a client's database. Recalibration helps the client see score changes over the past year.
4. In the **Records scored** field, enter the number of constituents for whom scores have been created.
5. Select **Client purchased same number of records for all scores** if the client purchased all records and scores. Clients can purchase any number of scores and records they wish.
6. In the **Records bought** field, enter the number of records purchased in this field.
7. In the **Description** field, enter a project description .
8. In the **Distribution** field, click **Choose File** to upload a distribution file. Distribution files appear in the expanded view of the Model scores and ratings tab on a client's Wealth and Ratings Management page. For more information on distribution files, see Distribution View on page 8. To clear an existing file, click **Clear File**.
9. In the **Presentation files** field, click **Choose File** to upload files such as PowerPoint presentations. You can upload up to five files. The file size limit is 28 megabytes. If you need additional file size, contact your web server systems administrator.

Edit a project

1. On the Target Analytics Import Files and Projects tab of the Manage Model Scores and Ratings page, select a projects under **Projects, distributions, and presentations** and click **Edit**. The Edit Project screen appears.
2. Make any necessary changes. The options on the Edit project screen are the same as on the Add a project screen. For a detailed explanation of these fields, see Add a project on page 17.
3. Click **Save**. You return to the Manage Model Scores and Ratings page.

Delete a project

You can delete any project on the Manage Model Scores and Ratings page. If a project is associated with model scores, deleting the project does not change the score values. If the project date is the most recent model score date, current scores are displayed with a different date after you delete the project.

1. On the Target Analytics Import Files and Projects tab of the Manage Model Scores and Ratings page, select the project you want to delete.
2. Click **Delete**. The **Delete a project** page appears. A confirmation screen appears.
3. Click **Yes.** You return to the Manage Model Scores and Ratings page.

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.

Edit the prospect manager assigned a prospect

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The **Edit research details**[1] screen appears.
3. In the **Prospect manager** field, enter the new manager you want assigned this prospect.
4. Click **Save** to save the change.

Edit a Prospect's Research Status

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The **Edit research details**[2] screen appears.
3. In the **Research status** field, enter the prospect's new status.
4. Click **Save** to save the change.

Add/edit Prospect Research Summary Information

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The **Edit research details**[3] screen appears.
3. In the **Research summary** field, enter any summary information.
4. Click **Save** to save the change.
5. Summary data displays in the **Research Summary** section of the Wealth Summary tab.

Edit Research Details Screen

From this screen, you can track prospect status information, managers assigned prospects, and any research summary data. Once entered, this information displays on the Wealth Summary tab of the prospect's Wealth and Ratings page, making the data easily accessible to fundraisers and development officers.

[1]If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

[2]If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

[3]If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

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**[1], 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 93.

Add a prospect's real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.

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

2. Expand the **Real estate** section.
3. Click **Add**. The Add real estate information screen appears.
4. To save your entry and return to the Assets tab, click **Save**.

[1]Other indicators located that tell you something about this constituent's wealth. For example, a membership in a millionaire club or tax assessor data.

Add Real Estate Information Screen

You access prospect real estate information from the Real estate section of the Assets tab on the prospect's Wealth and Ratings page. The information is arranged in the following tabs:

- Property Tab on page 21
- Assessment Tab on page 21
- Assessment Detail tab on page 22
- Deed tab on page 22
- Mortgage Tab on page 23

Property Tab

The Property tab houses general information about the real estate, the location of the real estate, and the assessed and market values of the real estate.

Field Name	Field Explanation
Source	Source of the real estate information.
Address information	Site address of the property.
APN (Assessor's parcel number)	Serial number assigned to the property.
Owner	Name of the constituent.
Care of name	Name of the individual responsible for the property.
Mailing address	Address of the name entered in the **Care of name** field..
Reported values	The reported **Sales amount** displays in the **Value** column and the date this amount was recorded in the **Reported date** column. The **Property valuation** is the largest of the following: property value estimate, assessed amount, market value, sales amount, loan amount, or second loan amount.
Notes	Any additional information about the property.

Assessment Tab

Field Name	Field Explanation
Assessee #1 name	Assessed owner as of the Lien date. This is the name exactly as shown in the current Assessor's Tax Roll.
Assessee #2 name	This name varies from county to county. It contains any additional assessed owner name when provided separately by the county. DBA names are preceded with indicator of "dba."
Care of name	If a C/O name is included in the assessment record, it is recorded here.
Assessee address	Any address information associated with the assessee is recorded here.
Recording date	Date of the most recent sale as listed on the county tax/assessment roll.
Document type	County description of the document type for most recent sale.
Tape cut date	Date sale was recorded.
Sales price	Price paid by the current owner of the property as listed on the county tax/assessment roll.

Field Name	Field Explanation
Sales price indicator	Identifies the sales price indicator: full amount, assessor qualified, partial amount, etc.
Assessed value year	Year property was assessed.
Assessed improvement value	Value attached to any structures or improvements made to the property in the last assessed year.
Assessed land value	Value attached to land alone in the last assessed year.
Total assessed value	Total assessed value of property (includes improvements and land).
Market value year	Year property market value was assigned.
Market improvement value	Market value attached to any structures or improvements made to the property.
Market land value	Market value attached to land alone.
Total market value	Total market value of property (includes improvements and land).

Assessment Detail tab

This tab houses property specifications - number of rooms, size, year built, heating and cooling information.

Deed tab

This tab houses ownership and property description information.

Field Name	Field Explanation
Buyer #1 name/Buy #2 name	Identifies buyers listed on the deed.
Buyer vesting	Indicates how the buyers took title to the subject property: community property, estate, family trust, etc.
Care of name	If a C/O name is included in the deed, it is recorded here.
Buyer address	Address recorded for the buyer.
Seller #1 name/Seller #2 name	Identifies sellers included on the deed.
Seller address	Address recorded for the seller.
Recording date	Date the parties record the deed. Post dates the recording date.
Document type	Indicates the deed document type: affidavit, conservator's deed, contract of sale, etc.
Date of contract	The date the document was executed by the parties. This pre-dates the recording date.
Sale price	Amount paid for property by current owner.
Loan amount	Total amount borrowed to purchase the property.
Loan type	Indicates the type of loan: cash, FHA, land contract, etc.
Type of financing	Indicates financing: adjustable rate, fixed rate, other.
Due date	Date the first trust deed will be paid in full.
Lender name	Name of the beneficiary to the first trust deed (mortgage). When more that one lender is reported, only the first lender included on the document is entered. If a Trust, along with Trustees appear as Lender, then the Trust Name is entered.
Title company	Name of title company which issues the certificate of title insurance. This information is taken from the Deed and/or Trust Deed.
Legal property description	Legal description of the property, which includes property use, lot code and number, block, unit number, city/township, subdivision, and a brief description.

Mortgage Tab

This tab tracks mortgage information associated with the property. It records data for up to two mortgages.

Field Name	Field Explanation
Recording date	Date the parties record the mortgage.
Borrower #1 name/Borrower #2 name	Borrowers associated with the mortgage.
Borrower vesting	Tracks vesting of borrowers. For example, John Smith and Jane Smith, Husband and Wife, as Joints Tenants with rights of survivorship.
Borrower address	Address information associated with the borrowers.
Loan amount	Total amount borrowed to purchase the property.
Loan type	Indicates the type of loan: cash, FHA, land contract, etc.
Type of financing	Indicates financing: adjustable rate, fixed rate, other.
Date of contract	The date the document was executed by the parties. This pre-dates the recording date.
Due date	Date the first trust deed will be paid in full.
Lender name	Name of the beneficiary to the first trust deed (mortgage). When more that one lender is reported, only the first lender included on the document is entered. If a Trust, along with Trustees appear as Lender, then the Trust Name is entered.

Edit a constituent's real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

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

3. Expand the record you want to edit.
4. Click **Edit**. The Edit real estate information screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect's real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

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

3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect's real estate information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

> ***Note:*** For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

▸ Reject prospect's real estate information

If while attempting to confirm a prospect's real estate information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

> ***Note:*** For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

▸ Undo "Reject" on a prospect’s real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

> ***Note:*** For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

▸ Delete a prospect’s real estate information

> ***Note:*** Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.

> ***Note:*** For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

▸ Export a prospects’s real estate information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.

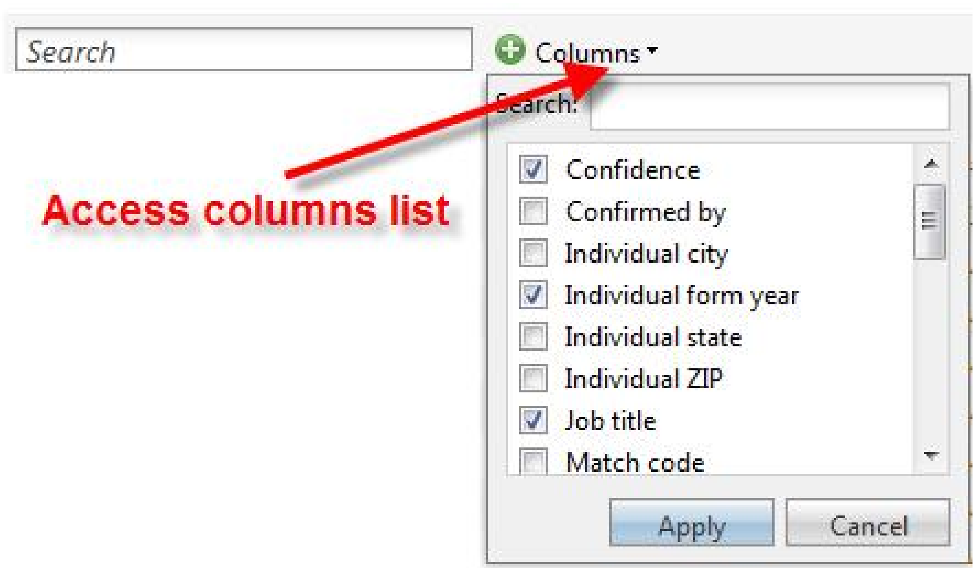
2. Expand the **Real Estate** section.

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

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Add a prospect's business ownership information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. Click **Add**. The Add business ownership information screen appears displaying the Company tab.
4. To save your entry and return to the Assets tab, click **Save**.

Add Business Ownership Information Screen

- Company Tab on page 27
- Biographies Tab on page 27
- Valuation Tab (Individual constituents, not organizations) on page 28
- Ownership Tab on page 28

Company Tab

Field Name	Field Explanation
Source	Source of the business ownership information.
Company	Name of the company associated with the constituent.
Trade name	Also known as the business name, the trade name is the name under which a business trades for commercial purposes.
Description	Company's primary line of business.
Company address information	Company's address information.
Year started	Year the company started.
# of employees	Number of individuals employed by the company.
Held	Identifies the company as privately or publicly held.
Phone	Company's telephone number.
Mailing address	The address used for business mail.
Name	Name of owner (individual constituents only).
Job title	Title in company (individual constituents only).
% ownership	What percentage of the company this constituent owns.
Ownership value	Monetary value associated with this constituent's ownership.
Home address	Owner's home address (individual constituents only).
Year of birth	Owner's birth date (individual constituents only).
Gender	Owner's gender (individual constituents only).

Biographies Tab

This tab houses biographical information about key officers in the company.

Valuation Tab (Individual constituents, not organizations)

Field Name	Field Explanation
DUNS	The D&B DUNS number is a unique nine-digit identification sequence that provides unique identifiers of single business entities.
SIC code used	The SIC code used in the **Valuation**. The application searches all six codes and the first code located with a corresponding **Ratio** is used in determining the **Valuation** entry. For example, if **SIC code 1** has a 0.00 **Ratio** and **SIC code 2** a 0.789 **Ratio**, **SIC code 2** is used.
Sales	Annual sales as reported by the company.
Ratio used	The ratio used in the **Valuation**. The application searches all **Ratio** columns and the first column located with an entry is used in determining the **Valuation** entry.
Valuation	A calculation that takes the **Sales** information from the D&B record multiplied by the IBA Market data ratio for privately held companies. The application looks at each **Ratio** column available for the business record, and selects the first column with a valid entry. This entry is used to determine the valuation.
SIC Code/Ratio	Standard Industrial Classification (SIC) codes are four digit numerical codes assigned by the U.S. government to business establishments to identify the primary business of the establishment. The first two digits of the code identify the major industry group, the third digit identifies the industry group and the fourth digit identifies the industry.

Note: SIC Code, calculated average Price/Revenue Ratio and calculated average Discretionary Earnings to Revenue Ratio, both based on IBA Market data ©. This material is used by permission of the Institute of Business Appraisers.

Ownership Tab

This tab lists any other owners of the business along with their **Name, % ownership** and **Ownership value**. It also displays any notes about the ownership.

Edit a prospect's business information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. In the grid, expand the entry you want to edit.
4. Click **Edit**. The Edit business ownership information screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect’s business information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s business information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Business** section.

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

3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's business information

If while attempting to confirm a prospect's business information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s business information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. In the grid, expand the entry you want to delete.

4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects's business information

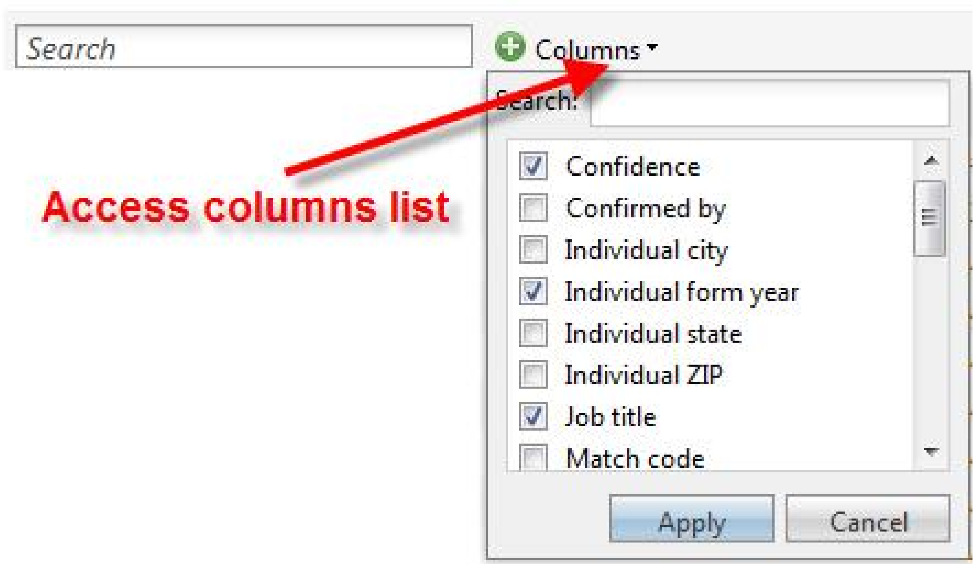
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.

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

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Add a prospect's securities holdings

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. Click **Add**. The Add securities screen appears displaying the Fields tab.
4. To save your entry and return to the Assets tab, click **Save**.

Add Securities Screen

You access constituent stockholding information from the Securities page on the constituent. This information is housed in the following sections.

- Fields Tab (Individual constituents only, not organizations) on page 32
- Transactions Tab (Individual constituents only, not organizations) on page 33
- Add Securities Screen (Organization constituents only, not individuals) on page 33

Fields Tab (Individual constituents only, not organizations)

Field Name	Field Explanation
Name	Name listed as the owner of the stock.
Filer ID	Enter the filer ID number.
Relationship	Constituent's relationship to the company.
Symbol	Ticker symbol is an abbreviation used to identify a security. The ticker symbols for stocks trading on the NYSE or AMEX have one to three letters. NASDAQ stock ticker symbols can consist of four or five letters. If this field is blank, the company may no longer be publicly held.
Issuer name	Name of the company in which the constituent owns stock.
Cusip	CUSIP stands for Committee on Uniform Securities Identification Procedures. A CUSIP number identifies most securities, including stocks of all registered U.S. and Canadian companies, and U.S. government and municipal bonds.
Direct	This row displays information about stock directly held by the constituent. **Date** - Date of last action; **Quantity** - number of shares directly held by the constituent; **Price** - approximate current share price of the stock; **Value** - product of the share price multiplied by the number of shares.
Indirect	This row displays information about stock indirectly held by the constituent. For example, the stock may be in the constituent's wife's name. **Date** - Date of last action; **Quantity** - number of shares indirectly held by the constituent; **Price** - approximate current share price of the stock; **Value** - product of the share price multiplied by the number of shares.
Source	Source of the stock information.
Notes	Enter any additional information about the security.

Transactions Tab (Individual constituents only, not organizations)

Field Name	Field Explanation
Quantity	Number of shares held.
Transaction date	Date the security transaction took place.
Share price	Share price as located by Thomson.
Ownership type	Type of ownership.
Transaction description	Brief description of the transaction.
Transaction value	The proceeds or costs resulting from the transaction.

Add Securities Screen (Organization constituents only, not individuals)

Field Name	Field Explanation
Source	Source of the stock information.
Symbol	Ticker symbol is an abbreviation used to identify a security. The ticker symbols for stocks trading on the NYSE or AMEX have one to three letters. NASDAQ stock ticker symbols can consist of four or five letters. If this field is blank, the company may no longer be publicly held.
Issuer name	Name of the company in which the constituent owns stock.
Holdings information	Details about the stock holdings, such as the quantity of shares held, total value, last retrieved price information, and more.
Notes	Enter any additional information about the security.

Edit a prospect’s securities information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry you want to edit.
4. Click **Edit**. The Edit securities screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect’s stock holding information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s stock holding information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.

Reject prospect's stockholding information

If while attempting to confirm a prospect's securities information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s stock holding information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s stock holding information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. In the grid, expand the entry you want to delete.

4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects's stock holding information

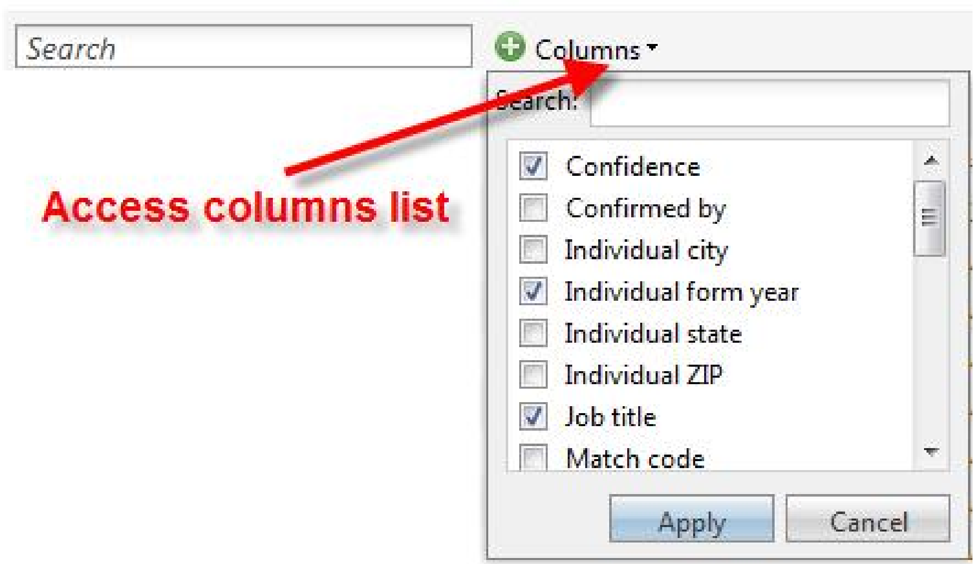
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.

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

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

Wealth Indicators

For individuals, the Wealth indicators section of the Assets tab tracks the prospect's general **wealth indicators**[1].

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***.

[1]Other indicators located that tell you something about this constituent's wealth. For example, a membership in a millionaire club or tax assessor data.

Larkspur compiles **wealth indicators**[1] 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 93.

Add a prospect's wealth indicator information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. Click **Add**. The Add wealth indicator screen appears displaying the Personal tab.
4. To save your entry and return to the Assets tab, click **Save**.

Add Wealth Indicator Information Screen

You access constituent affluence indicator information from the Affluence indicators page on the constituent.

- Personal Tab on page 37
- Contact Tab on page 37

Personal Tab

Field Name	Field Explanation
Source	Source of the information.
Name/Gender/Age/Marital Status/Children	Basic personal information about the constituent.
Job title	Constituent's professional title - CEO of XYZ Corporation.
Millionaire code	Information contained in this field varies. It may include a wealth designation, such as "millionaire"; it often includes a salary range.
Income	Constituent's annual income.
Donor type	Type of causes to which the constituent likes to give - political, religious.
Contributor type	Types of cause to which the constituent likes to give - liberal, conservative.
Political affiliation/Religious affiliation/Ethnicity	Basic personal information about the constituent's political and religious affiliations and ethnicity association.
Wealth indicators	This field displays information on the investment habits of your constituent. The investment information offered is almost entirely self-reported, taken from a variety of sources, including surveys and mail-in response cards. Other information is inferred from subscriptions to different publications, memberships in certain organizations, or requests for information on specific topics.
Notes	Enter any notes associated with the data source information.

Contact Tab

This tab tracks the constituent's general contact information - address, phone, company.

[1]Other indicators located that tell you something about this constituent's wealth. For example, a membership in a millionaire club or tax assessor data.

Edit a prospect’s wealth indicator information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. In the grid, expand the entry you want to edit.
4. Click **Edit**. The Edit wealth indicators screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect’s wealth indicator information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s wealth indicator information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicator** section.
3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.

Reject prospect's wealth indicator information

If while attempting to confirm a prospect's wealth indicator information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicator** section.
3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s wealth indicator information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s wealth indicator information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record.

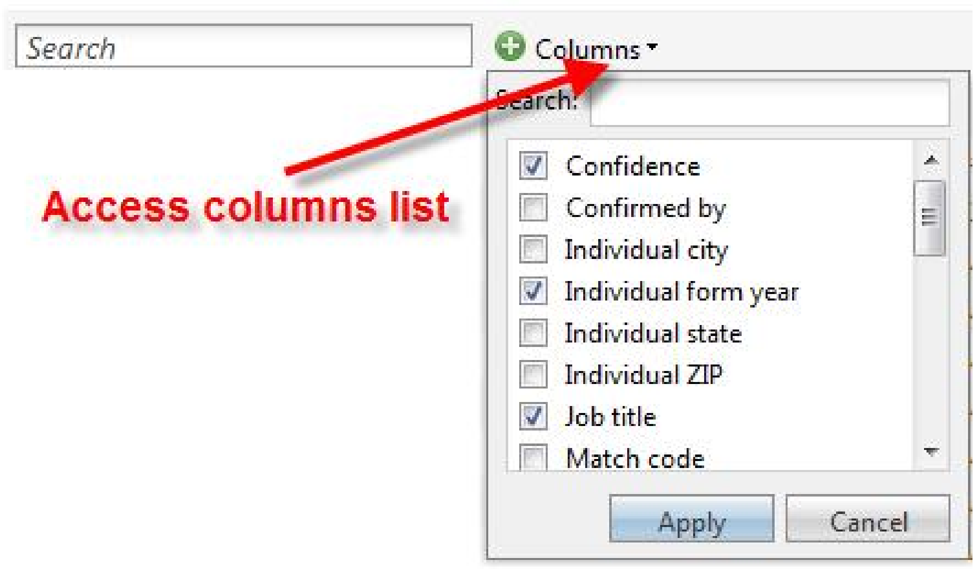
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. In the grid, expand the entry you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects’s wealth indicator information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Add a prospect's income and compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Click **Add**. The Add income/compensation screen appears.
4. To save your entry and return to the Assets tab, click **Save**.

Add Income/Compensation Information Screen

You access constituent income/compensation information from the Income/Compensation page on the constituent.

Field Name	Field Explanation
Source	Source of the income/compensation information.
Company	Name of the company with which the constituent is associated.
Symbol	Ticker symbol is an abbreviation used to identify a security. The ticker symbols for stocks trading on the NYSE or AMEX have one to three letters. NASDAQ stock ticker symbols can consist of four or five letters. If this field is blank, the company may no longer be publicly held.
Name	Constituent's name as listed on the proxy statement.

Field Name	Field Explanation
Job title	Constituent's title in the corporation.
Officer/Director	If the constituent holds an officer's title (CEO) or a director's title (Active Director of the board).
Officer Start	If the constituent is an officer, this field displays his start date.
Director Start	If the constituent is a director, this field displays his start date.
Age	Constituent's age.
Compensation frame	Displays information about any compensation the constituent received as a result of his position in the company: **Year** - Year compensation received; **Salary** - Amount of compensation classified as salary; **Bonus** - Amount of compensation classified as bonus; **Other Short Term** - Amount of any short term compensation (company car); **Other Long Term** - Amount of any long term compensation.
Options frame	Displays information about any options exercised by the constituent: **Exercised** - Value of any options exercised in the reporting year; **Unexercised** - Value of options available but not yet exercised by the constituent in the reporting year; **Unexerciseable** - Value of options granted but not vested as of reporting year.
Biography	Information about the constituent provided by the reporting company.
Notes	Enter any notes associated with the data source information.

Edit a prospect's income/compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to edit.
4. Click **Edit**. The Edit Income/Compensation screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect's income/compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect's income/compensation information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.

Reject prospect's income/compensation information

If while attempting to confirm a prospect's income/compensation information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s income/compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s income/compensation information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
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   Note: For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. In the grid, expand the entry you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects’s income/compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

> ***Note:*** For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
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Manage Columns Displayed in Grid

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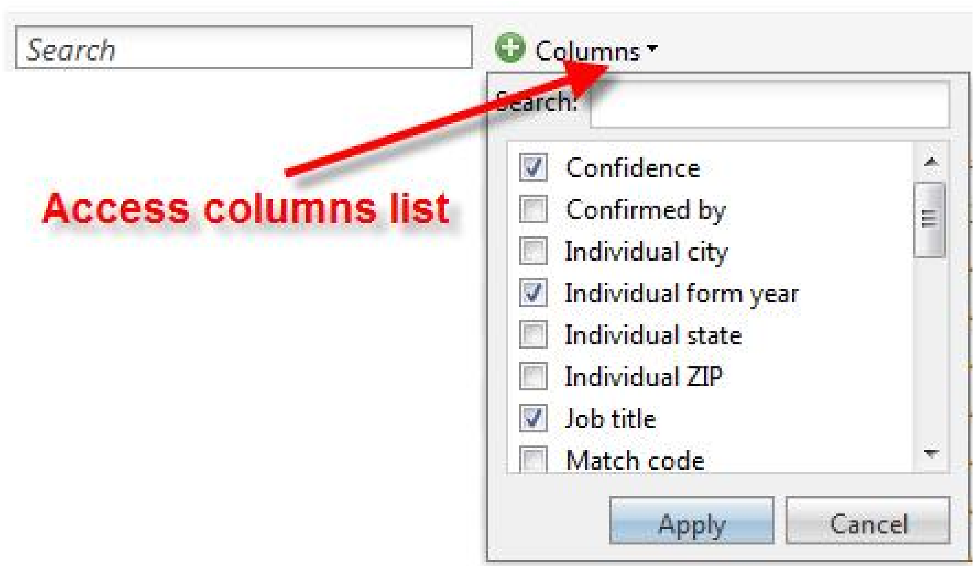

A screen appears for you to select which columns to show and hide. Unselect any columns you do not want displayed and select those you do want to see in the grid. Click **Apply** and your changes display in the grid.

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
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- 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
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- 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.

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 93.

Add a prospect's miscellaneous asset information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

   Note: For organizations and households, click **Other assets** in the **Wealth summary** section of the Wealth and Ratings screen.
3. Click **Add**. The Add other assets screen appears.
4. To save your entry and return to the Assets tab, click **Save**.

Add Other Assets Screen

Field Name	Field Explanation
Source	How you learned about this asset.
Description	Description of the other asset.
Value	Value of the other asset.
Notes	Enter any additional information about the asset.

Edit a prospect's miscellaneous asset information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

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

3. In the grid, expand the entry you want to edit.
4. Click **Edit**. The Edit Other Assets screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Confirm a prospect's miscellaneous assets information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

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

3. In the grid, expand the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect's miscellaneous asset information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.

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

3. In the grid, expand the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed.

Reject prospect's miscellaneous asset information

If while attempting to confirm a prospect's miscellaneous asset information, you discover it to be unreliable and you want the information designated as such on the record, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.

2. Expand the **Other assets** section.

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

3. In the grid, expand the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect's miscellaneous information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

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

3. In the grid, expand the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect's miscellaneous information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent's ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

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

3. In the grid, expand the entry you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects's miscellaneous asset information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.

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

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process

6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

Add giving-to-my-organization information

1. From the prospect’s Wealth and Ratings page, select the Giving tab.
2. In the **Giving to my organization** section, click **Add**. The Add giving to my organization screen appears.
3. From here you can enter:
   a. Total giving amount
   b. Total number of gifts number
   c. And information about the Largest, First, and Latest gifts.
4. To save your entry and return to the Giving tab, click **Save**.

Add Giving To My Organization Screen

Screen Item	Description
Total giving	The total of all gifts given to your organization by this prospect as of the **Last updated date** displayed at the top of the tab.
Total number of gifts	The total number of gifts given to your organization by this prospect as of the **Last updated date** displayed at the top of the tab.
Largest/First/Latest	These sections set the properties for the largest, first, and latest gift given to your organization by this prospect. In each section, select: • **Type**: Type of gift, such as "Funds," "Materials," "Volunteer" • **Designation**: Where the money is going to go or how it’s going to be used, such as an unrestricted annual fund or a specific endowment fund. Each designation is mapped to an account in the ledger. • **Amount**:Value of gift • **Date**: Date gift made

Edit giving-to-my-organization information

1. From the prospect’s Wealth and Ratings page, select the Giving tab.

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

2. Expand the **Giving to my organization** section.
3. Click **Edit**. The Edit giving to my organization screen appears.
4. From here you can change:
   a. Total giving amount
   b. Total number of gifts number
   c. And information about the Largest, First, and Latest gifts.
5. To save your entry and return to the Giving tab, click **Save**.

Clear giving-to-my-organization information

1. From the prospect’s Wealth and Ratings page, select the Giving tab.

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

2. Expand the **Giving to my organization** section.
3. Click **Clear**.

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[1], 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 93.

Add a prospect's charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. Click **Add**. The Add Philanthropic gift information screen appears.

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

4. To save your entry and return to the Giving tab, click **Save**.

Add Philanthropic Gift Information Screen

Field Name	Field Explanation
Source	Source of the charitable donation information.
Organization	Name of the nonprofit organization to which the constituent donated.
Location	Address information for the nonprofit organization.
EIN	Constituent's employer identification number.
Category	Type of nonprofit organization that received the gift.
Name	Constituent's name as listed in the nonprofit organization's annual report.
Matched fields	The **Matched address**, **Matched city**, **Matched state**, and **Matched ZIP** fields display the address information used to match the research data found with a this prospect. These fields are for subscriptions levels that allow for address matching in NOZA.
Gift Type	Type of gift given: individual, estate, cumulative, capital.
Gift Year	The year the annual report providing the gift information was published.
Amount range/to	The range of the gift amount. Because most annual reports categorize donors based on a gift range, often times the exact amount donated is not published, just the gift range category in which the constituent's name appeared. In the first field, enter the low amount. In the field after "to" enter the high amount.
Start year/End year	Start year and end year of the annual report.
Web Address	Web address of the nonprofit organization to which the constituent donated.
Source Material	Web address of the publication from which the philanthropic gift information was taken.
Notes	Enter any notes associated with the data source information.

[1]Gathers information on charitable donations from thousands of nonprofit organations covering all 50 states. Donor name, type of gift, contribution date, and gift size are included in these detailed reports.

Edit a prospect’s charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.

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

3. In the grid, select the entry you want to edit.
4. Click **Edit**. The Edit Philanthropic gift information screen appears.
5. To save your entry and return to the Giving tab, click **Save**.

Confirm a prospect’s charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.

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

3. In the grid, select the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s charitable donation information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.

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

3. In the grid, select the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's philanthropic gift information

If while attempting to confirm a constituent’s philanthropic gift information, you discover it to be unreliable and you want the information designated as such on the constituent, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.

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

3. In the grid, select the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. In the grid, select the entry for which you want to undo the "Reject" status.

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

4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s philanthropic gift information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record. For information on how to reject a record, see Reject prospect's philanthropic gift information on page 51.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. In the grid, select the entry you want to delete.

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

4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects’s philanthropic gift information

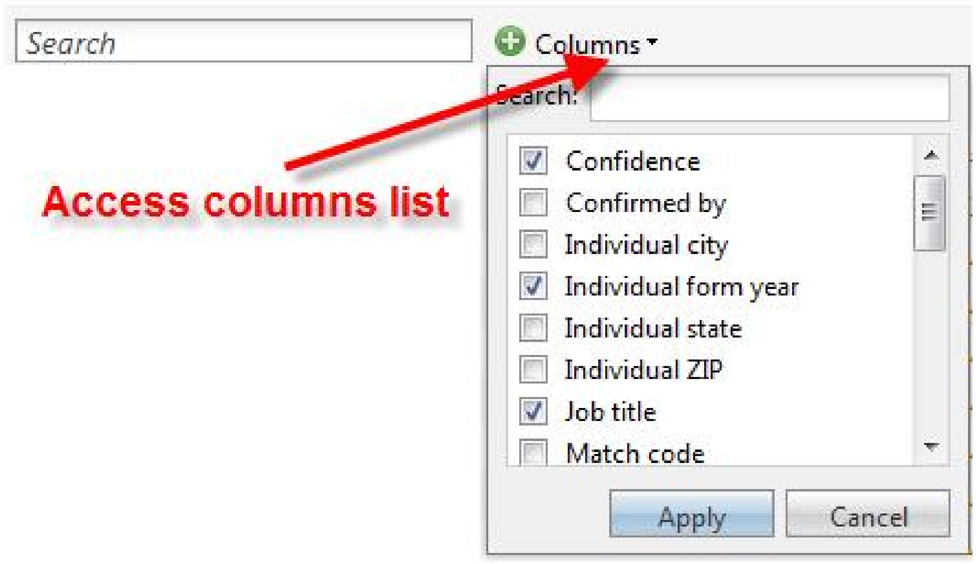
1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.

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

3. From the menu bar in the section, click the drop-down arrow next to **Export list**.
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Adding constituent political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

   Note: For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
3. Click **Add**. The Add political donation screen appears.
4. To save the entry and return to the Giving tab, click **Save**.

Add Political Donation Screen

Field Name	Field Explanation
Source	Source of the political donation information.
Recipient	Name of the individual or organization receiving the donation.
Date	Date of contribution.
Amount	Amount of contribution.
Name	Donor’s name.
Occupation	Donor’s occupation. This information is self-reported by the donor.
City, State, ZIP	Donor’s address information.
Notes	Enter any notes associated with the data source information.

Edit prospect's political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry you want to edit.
4. Click **Edit**. The Edit Political Donation screen appears.
5. To save your entry and return to the Giving tab, click **Save**.

Confirm a prospect’s political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s political donations information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's political donation information

If while attempting to confirm a constituent’s political donation information, you discover it to be unreliable and you want the information designated as such on the constituent, you can reject the information without removing it from your system.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry you want to reject.
4. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

Undo "Reject" on a prospect’s political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry for which you want to undo the "Reject" status.
4. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s political donation information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent’s ***WealthPoint*** data, you can reject the record. For information on how to reject a record, see Reject prospect's political donation information on page 55.

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

3. In the grid, select the entry you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects’s political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.

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

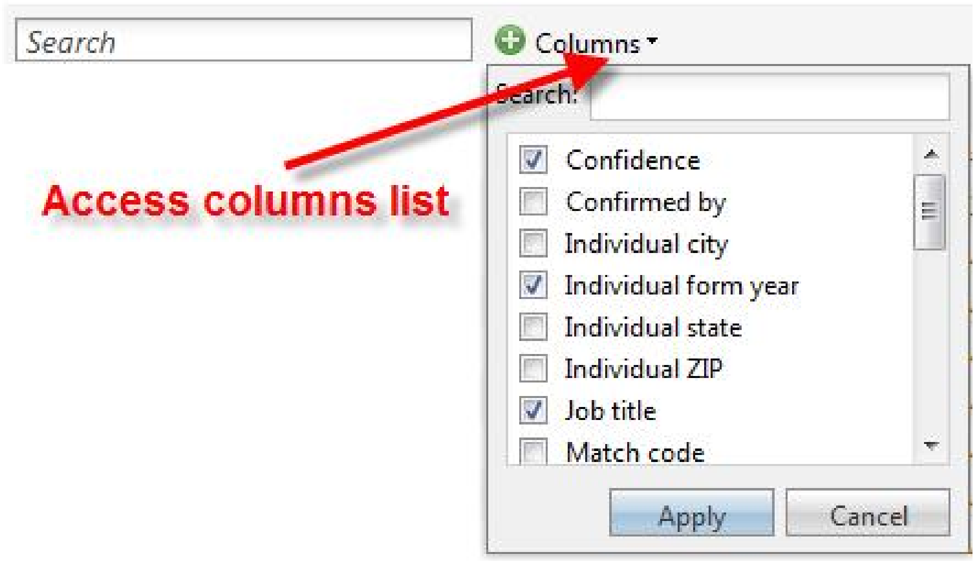
3. From the menu bar in the section, click the drop-down arrow next to the **Export** icon.

4. The drop-down menu allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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[1].

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.

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[1] A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "memeber" are common constituent constituencies.

For information about managing your columns and filtering and searching content in the grid, see Manage Columns Displayed in Grid on page 93.

Add a constituent's nonprofit affiliation information

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. In the **Non-profit affiliations** section, click **Add**. The Add nonprofit affiliation information screen appears.

   Note: For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. To save your entry and return to the Affiliations tab, click **Save**.

Add Nonprofit Affiliation Information Screen

Field Name	Field Explanation
Source	Source of the nonprofit affiliation information.
Organization	Name of the nonprofit organization with which the constituent has an officer/director relationship.
Description	A description of the nonprofit.
Address, City, State, ZIP	Nonprofit organization's address information.
EIN	The constituent's employer identification number.
Revenue	Revenue generated by nonprofit.
Total assets	Fair market value of all nonprofit's assets.
Phone	Nonprofit organization's phone number.
Website	Nonprofit's Website address.
Org. form year	The year entered on the nonprofit affiliation forms (used to retain 501(c)(3) status).
Ruling year	The year that the IRS granted an organization 501(c)(3) status.
Name	Constituent's name.
Location city, Location state, and **Location ZIP**	The affiliated constituent's location information.
Job title	Constituent's title with the nonprofit organization.
Salary	Salary amount the nonprofit pays the constituent.
Form year	The year the constituent's affiliation with the nonprofit started.
Notes	Enter any notes associated with the data source information.

Edit a constituent's nonprofit affiliation information

1. From the constituent's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.

   Note: For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Locate and select the record you want to change.
4. Click **Edit**. The Edit nonprofit affiliation information screen appears.

5. Enter the new information. The fields and options included on this screen are the same as those on the Add nonprofit affiliation information screen. For more information about these fields and options, see Add Nonprofit Affiliation Information Screen on page 59.
6. To save your entry and return to the Affiliation tab, click **Save**.

Confirm a constituent's nonprofit affiliation information

1. From the constituent's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.

   Note: For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Locate and select the record you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

   Click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed".

Unconfirm a prospect's nonprofit affiliation information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.

   Note: For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Locate and select the record you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed."

Reject constituent nonprofit affiliation information

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.

   Note: For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Locate and select the record you want to reject.
4. On the action bar, click **Reject**. The "Reject" icon displays in the **Confidence** column.

   Click **Clear status** to remove the icon from the **Confidence** column.

Delete a prospect's nonprofit affiliation information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent's ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.

> ***Note:*** For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.

3. Locate and select the record you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

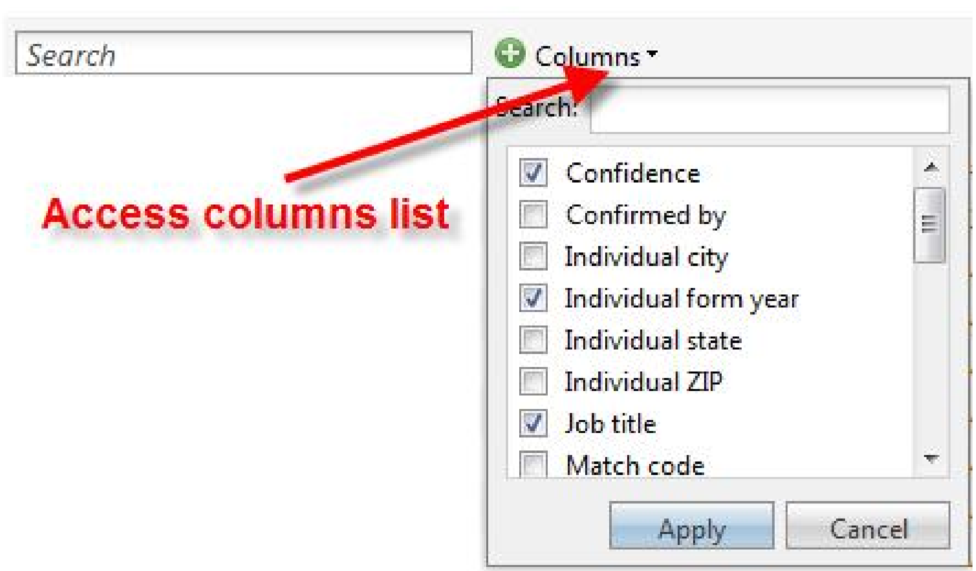
Export a prospects's non-profit affiliation information

1. From the prospect's Wealth and Ratings screen, click the Affiliations tab.
2. Expand the **Non-profit affiliation** section.
3. From the menu bar in the section, click the drop-down arrow next to the **Export** icon.

4. The drop-down menu allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Add foundations information to a constituent wealth record

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Click **Add**. The Add foundation affiliation information screen appears.
4. To save your entry and return to the Affiliations tab, click **Save**.

Add Foundation Affiliation Information Screen

Field Name	Field Explanation
Source	Source of the foundation affiliation information.
Organization	Name of the foundation with which the constituent has a relationship.
Description	A description of the foundation affiliation.
Address, City, State, ZIP	Foundation's address information.
EIN	The constituent's employer identification number.
Total assets	Fair market value of all foundation's assets.
Fair market value assets	Amount the foundation could obtain by selling its assets.
Phone	Foundation's phone number.
Website	Foundation's Website address.
Org. form year	The year entered on the foundation forms (used to retain 501(c)(3) status).
Ruling year	The year that the IRS granted an organization 501(c)(3) status.
Name	Constituent's name.
Location city, Location state, and **Location ZIP**	The affiliated constituent's location information.
Job title	Constituent's title with the foundation.
Compensation	Salary amount the foundation pays the constituent.
Form year	The year the constituent's affiliation with the foundation started.
Notes	Enter any notes associated with the data source information.

Edit constituent Foundation affiliations information

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Expand the record you want to change.
4. Click **Edit**. The Edit foundation affiliation information screen appears.

5. Make any necessary changes.
6. Click **Save**.

Confirm a constituent's Foundation affiliation information

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Expand the record you want to confirm.
4. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

   Click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed".

Unconfirm a prospect's foundation affiliation information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Expand the record you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed".

Reject constituent Foundation affiliation information

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Expand the record you want to reject.
4. On the action bar, click **Reject**. The "Reject" icon appears in the **Confidence** column.

   Click **Clear status** to remove the icon from the **Confidence** column and return the status to "Unconfirmed".

Delete a constituent's Foundation affiliation information

Before deleting an entry, permanently removing it from your system, you may want to consider designating it with the "Reject" tag. Using the **Reject** option, you can remove information from consideration, without permanently removing it from your system. For more information, see Reject constituent Foundation affiliation information on page 64.

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the constituent, the deleted record reappears in the results. To permanently remove the record from a constituent's ***WealthPoint*** data, you can reject the record.

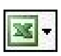
1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.

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

3. Expand the record you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the record.

Export a prospects's foundation information

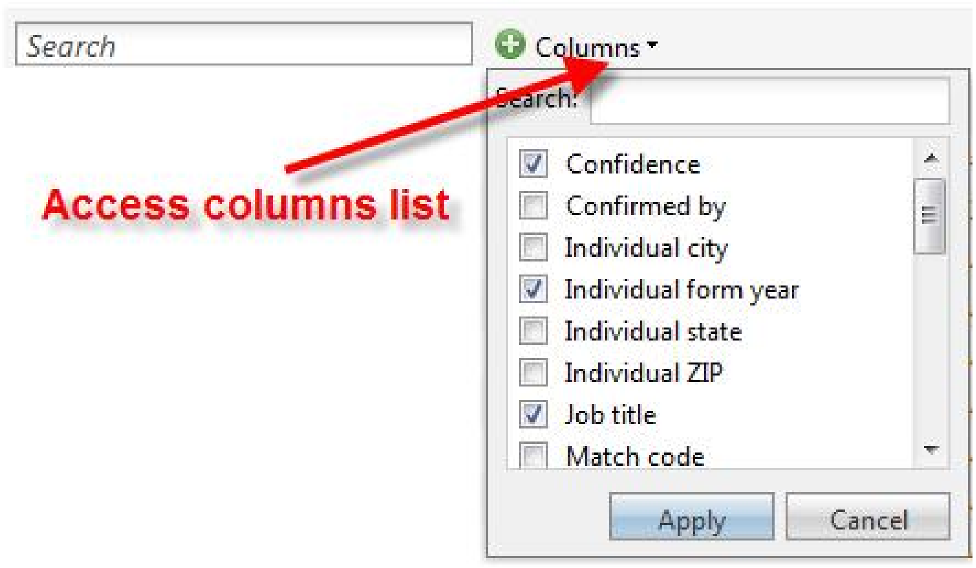
1. From the prospect's Wealth and Ratings screen, click the Affiliations tab.
2. Expand the **Foundation affiliations** section.
3. From the menu bar in the section, click the drop-down arrow next to the **Export** icon.

4. The drop-down menu allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

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 93.

Edit prospect network connection link

1. From the prospect’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Network connections** section.
3. Expand the entry you want to change.
4. Click **Edit link to organization**. The Edit link to organization constituent screen appears.
5. Make any necessary changes.
6. Click **Save**.

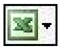
Confirm a prospect network connection relationship

1. From the prospect’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Network connections** section.
3. Expand the entry you want to confirm.
4. Click **Confirm relationship**. The Edit link to organization constituent screen appears.
5. Make any necessary changes.
6. Click **Save**.

Export a prospects’s network connection information

1. From the prospect's Wealth and Ratings screen, click the Affiliations tab.
2. Expand the **Network connections** section.

3. From the menu bar in the section, click the drop-down arrow next to the **Export** icon.

4. The drop-down menu allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

Constituencies

Constituencies define the affiliations your prospects have with your organization. A prospect can have multiple **constituencies**[1], 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**[2] to define these relationships and group similar prospects in queries and reports.

To view the **constituencies**[3] of a prospect, select the **Constituencies** section of the Affiliations tab on the prospect's Wealth and Ratings screen.

Add a constituency to a prospect

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. In the **Constituencies** section, click **Add** and in the drop-down menu select the constituency. The Add constituency screen displays.
3. Enter date information for the constituency.
4. Click **Save**.

Add Constituency Screen

Screen Item	Description
Constituency	This field appears for a user-defined constituency only. Select the type of constituency to assign

[1]A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.
[2]A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.
[3]A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.

Screen Item	Description
	to the constituent. The constituency defines why the constituent is in your database and the affiliation with your organization.
Date from	Enter the date the constituency begins.
Date to	Enter the date the constituency ends. If the duration of the constituency is undetermined, leave this field blank.

Edit prospect constituency

1. From the prospect’s Wealth and Ratings page, select the Affiliations tab.
2. Expand the **Constituencies** section.
3. Expand the entry you want to edit.
4. Click **Edit**. The Edit constituency screen displays.
5. Update the date information for the constituency.
6. Click **Save**.

Delete prospect constituency

1. From the prospect’s Wealth and Ratings page, select the Affiliations tab.
2. Expand the **Constituencies** section.
3. Expand the entry you want to delete.
4. Click **Delete**. A confirmation screen displays.
5. Click **Yes**.

Export a prospects’s constituency information

1. From the prospect's Wealth and Ratings screen, click the Affiliations tab.
2. Expand the **Constituencies** section.
3. From the menu bar in the section, click the drop-down arrow next to the **Export** icon.

4. The drop-down menu allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

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.

Note: This chapter focuses on the Biographical data section. For information about the other sections included on this tab, see the *Prospect Record Guide*.

- 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.

For information about transferring data from ***WealthPoint***, see Obtain Prospect Wealth Information on page 3.

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.

Filter Biographical Data Display

You can filter information included in the **Biographical data** section of the Biographical Information tab using the filter fields provided at the top of the section. If you do not see the fields, click the filter icon at the top of the section.

Add prospect biographical information

1. From the prospect’s Wealth and Ratings page, select the Biographical Information tab.

2. Expand the **Biographical data** section, and click **Add**. The Add biographical information screen appears, displaying the Name & address tab.
   - The Name & address tab includes name, home address, business address, birth information, and gender. You can edit any information contained on this screen.
   - The Bio 1 tab includes education, personal, family, award, and membership information.
   - The Bio 2 tab includes civic and military service information.
   - The Career tab includes career, occupation, position, and certification information.
3. To save your changes and return to the Biographical tab, click **Save**.

Add Biographical Information Screen

Name and Address Tab

The Name and address tab houses general information about the constituent: full name, birth date, home address, business address.

Field Name	Field Explanation
Source	Source of the biographical information. For example, if the information was provided by Marquis Who's Who, the information is entered in this field.
Name	Constituent's full name.
Gender	Constituent's gender.
Birth Date	Month, day, and year of constituent's birth.
Deceased Date	Date of constituent's death, if the record shows he passed away.
Birthplace	City and state of constituent's birth.
Home address frame	Constituent's home address.
Business address frame	Constituent's business address.
Notes	Any additional information associated with the constituent's wealth information biography.

Bio 1 Tab

The Bio 1 tab houses education, membership, and personal information about the constituent.

Field Name	Field Explanation
Education box	Information collected about the constituent's education.
Personal box	Personal information, such as names of parents and job history, collected about the constituent.
Family box	Information collected about the constituent's family history.
Awards box	Information collected about the constituent's awards (scholarships, fellowships).
Memberships box	Information collected about the constituent's memberships (Rotary Club, sorority).

Bio 2 Tab

The Bio 2 tab houses avocation(s)/interests, religious/political affiliations, and civic/military service information about the constituent.

Field Name	Field Explanation
Avocation(s)/Research/ Interests box	Avocation(s), such as reading and writing; research; and general interest information collected about the constituent.
Political/Religious affiliations box	The constituent’s affiliation with a specific religion or political party.
Civic/Military service box	Details about the constituent’s military service and any information collected about the constituent’s civic duties.
Law box	Legal affiliations.
Thoughts on life box	The constituent’s theories/thoughts on life.

Career Tab

The Career tab houses information about the constituent’s career/profession.

Field Name	Field Explanation
Career box	Information collected about the constituent’s professional career.
Occupation box	Information collected about the constituent’s occupation, such as the name of the occupation and duties.
Positions held box	Information collected about professional positions held by the constituent.
Certifications box	Information collected about any certifications held by the constituent.

Edit 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 you want to edit.
   - Click **Edit**. The Edit biographical information screen appears, displaying the Name & address tab.
   - The Name & address tab includes name, home address, business address, birth information, and gender. You can edit any information contained on this screen.
   - The Bio 1 tab includes education, personal, family, award, and membership information.
   - The Bio 2 tab includes civic and military service information.
   - The Career tab includes career, occupation, position, and certification information.
4. To save your changes and return to the Biographical tab, click **Save**.

Confirm constituent’s biographical information

1. From the prospect's Wealth and Ratings screen, click the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display.
3. Expand any record you want to confirm.
4. Click **Confirm**. A check mark appears in the **Confidence** column.

   Click **Clear status** to remove the check mark from the **Status** column and return the status to “Unconfirmed”.

Unconfirm a prospect’s biographical data information

The **Clear status** option also removes the "Reject" tag.

1. From the prospect's Wealth and Ratings page, select the Biographical information tab.
2. Expand the **Biographical data** section.
3. Locate and select the record you want to unconfirm.
4. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed."

Reject prospect biographical data information

1. From the prospect's Wealth and Ratings page, select the Biographical information tab.

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

2. Expand the **Biographical data** section.
3. Locate and select the record you want to reject.
4. On the action bar, click **Reject**. The "Reject" icon displays in the **Confidence** column.

   Click **Clear status** to remove the icon from the **Confidence** column.

Delete a prospect's biographical data information

Note: Deleting a record does not prevent the record from being included in future ***WealthPoint*** updates. The next time you run a ***WealthPoint*** update on the prospect, the deleted record reappears in the results. To permanently remove the record from a prospect's ***WealthPoint*** data, you can reject the record.

1. From the prospect's Wealth and Ratings page, select the Biographical information tab.
2. Expand the **Biographical data** section.
3. Locate and select the record you want to delete.
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects's biographical data information

1. From the prospect's Wealth and Ratings screen, click the Biographical Information tab.
2. Expand the **Biographical data** section.
3. From the menu bar in the section, click the drop-down arrow next to **Export list.**
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:
   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process
6. If you save the export file, a new message box appears, allowing you to:
   a. Open the export file
   b. Open the folder in which the export file was saved
   c. View all downloads

Confidence Rating

Each wealth record, whether imported from ***WealthPoint*** or manually entered, displays a **Confidence rating**[1]. 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.

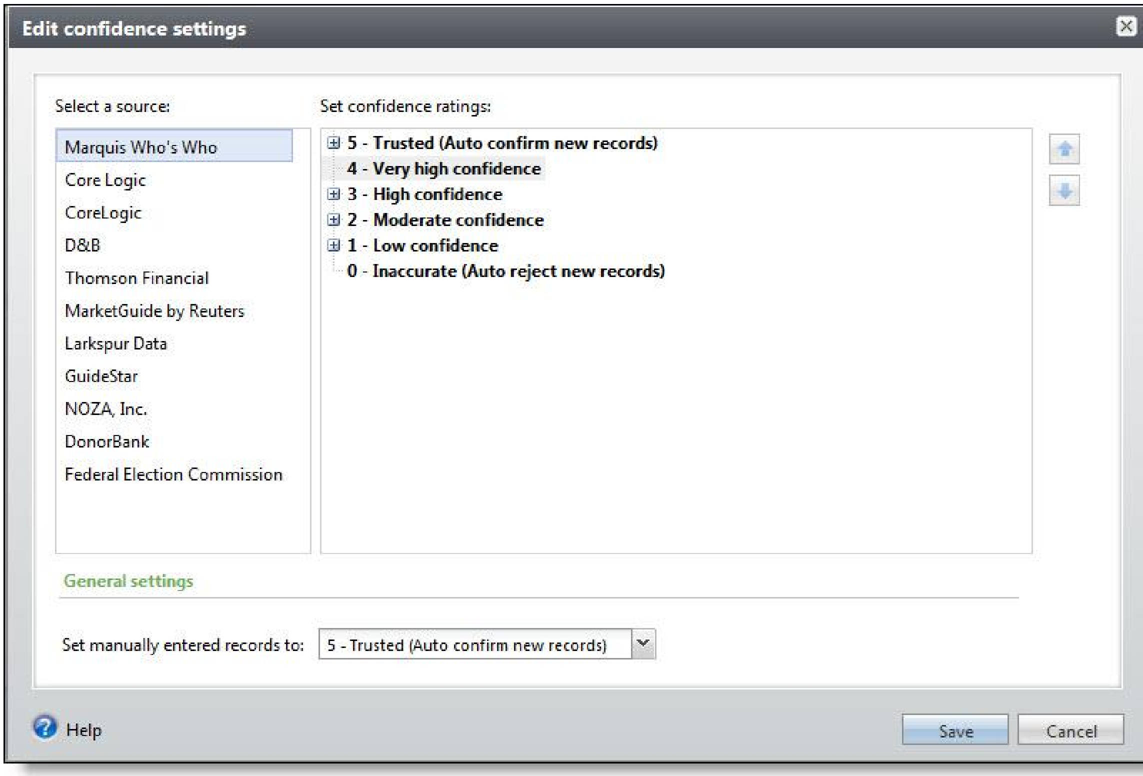
Edit Confidence Rating

Although the application includes a default confidence rating map, your organization may find the need to customize the ratings map to better meet your internal structures. When you edit a ratings map, you change the criteria used to determine the ratings number.

▶ **Edit confidence rating map**

1. From the Prospects page, under **Configuration**, click **Edit confidence settings**. The Edit confidence settings screen appears.

[1]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”.



2. In the **Select a source** box, select the wealth information source for which you want to edit the confidence ratings.
3. In the **Set confidence ratings** box, the rating information for the selected source appears. Expand the plus signs next to the ratings number to view the criteria used to qualify for the rating.
4. Select the criteria entry and using the arrow buttons move the criteria to the new rating number. For example, in the default settings, "P06 - Name, Phone number, First/Middle Combination" is included in the "4" rating category. To move this up to the "5" category, select the P06 criteria and click the up arrow key. The criteria is now associated with the "5" rating category for the selected data source.
5. To establish a default rating for all manually entered wealth records, in the **Set manually entered records to** field, select the rating you want used. Once the rating is established, the application automatically applies this rating to all manually entered wealth records.
6. Click **Save** to save your changes and return to the data source page.

Group Member Ratings

The **Group member giving capacity** grid included on the group Wealth and Ratings page, displays aggregated wealth information for the individual constituents included in the group or household. If the same wealth detail record exists for two or more constituents in the group, it is counted only once. For example if a husband and wife in a household each include their home under real estate, the value of the home is included in the group wealth summary only one time.

Access Group Member Record

From the Group Member Ratings tab on the Wealth and Ratings page, you can easily access a group member's constituent record. Form the **Group member giving capacity** grid, select the constituent you want to view.

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.

Add Transaction to Existing Securities Record

You can include transaction information when you create a securities record; however, if after creating the record, you need to add additional transaction information, you can do so from the transactions page.

Add new transaction to an existing securities record

1. 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.

2. In the grid, click the entry to which you want to add transaction information.
3. Click **Add**. The Add security transactions screen appears. For information about completing the fields included on this screen, see Transactions Tab (Individual constituents only, not organizations) on page 33.
4. Click **Save** to save the entry and return to the transactions page.

Edit Security Transaction

You can include transaction information when you create a securities record; however, if after creating the record, you need to make changes to the information, you can do so from the transactions page.

Edit existing security transactions

1. From the constituent's Wealth and Ratings page, click **Securities** in the **Wealth summary** grid. The constituent's Securities page appears.

   Note: For information about accessing the constituent's wealth information, see View Wealth Summary Information on page 5.

2. In the grid, click the entry in which you want to change transaction information.
3. Select the transaction you want to edit.
4. Click **Edit**. The Edit security transactions screen appears. For information about completing the fields included on this screen, see Transactions Tab (Individual constituents only, not organizations) on page 33.
5. Click **Save** to save the entry and return to the transactions page.

Delete Security Transaction

You can include transaction information when you create a securities record; however, if after creating the record, you need to remove the information from the record, you can do so from the transactions page.

Delete existing security transactions

1. From the constituent’s Wealth and Ratings page, click **Securities** in the **Wealth summary** grid. The constituent’s Securities page appears.

   Note: For information about accessing the constituent’s wealth information, see View Wealth Summary Information on page 5.

2. In the grid, click the entry from which you want to delete transaction information.
3. Select the transaction you want to delete.
4. Click **Delete**. A confirmation message appears.
5. Click **Yes** to delete the entry and return to the transactions page.

Data Refresh Notifications

If you choose to allow automatic **WealthPoint** Data Refreshes - by clicking the **Enable Data Refresh** option displayed on the explorer bar of the Wealth and Ratings Data page - any data refreshes added to the selected record are displayed on the WealthPoint Data Refresh Notification screen.

For individual prospects you access the WealthPoint Data Refresh Notification screen, by clicking **Data Refresh notifications** on the Wealth Summary tab of the prospect's Wealth and Ratings page.

Note: For information about enabling data refreshes, see Disable/Enable Wealth Updates on page 3.

WealthPoint Data Refresh Notifications Page

Accessed by clicking **View Data Refreshed** on the Wealth Summary tab of the prospect's Wealth and Ratings screen, the WealthPoint Data Refresh Notifications page displays any data refreshes added to the selected record. For example, if the D&B data is refreshed, the refresh information for this constituent displays here.

Note: Records located during a refresh that contain a zero or null value are not updated. The data existing in the record before the refresh remains. Only records with true data are updated during the refresh process.

The following data sources are included in the Data Refresh process:

- D&B
- GuideStar - Nonprofit Affiliations

- GuideStar - Foundation Affiliations
- Thomson
- Who’s Who

You can filter the notifications included on the tab based on the data **Source** or a selected **Date range**. Simply enter the information in the appropriate field included at the top of the **WealthPoint Data Refresh notifications** grid and click **Apply**. To return to the default setting of all notifications, click **Reset**.

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** [1]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**[2] 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.

[1]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.

[2]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.

Giving Summary

The **Giving summary**[1] link appears in the **More information** pane of the Wealth and Ratings page. This link takes you to the constituent's Giving Summary page. From this page, you can view total giving, largest gift, first gift, and latest gift information; and add, edit, and delete giving information. The page also tracks the constituent's total number of gifts.

Warning: The **Giving summary** option is available for only individual constituents, not organizations.

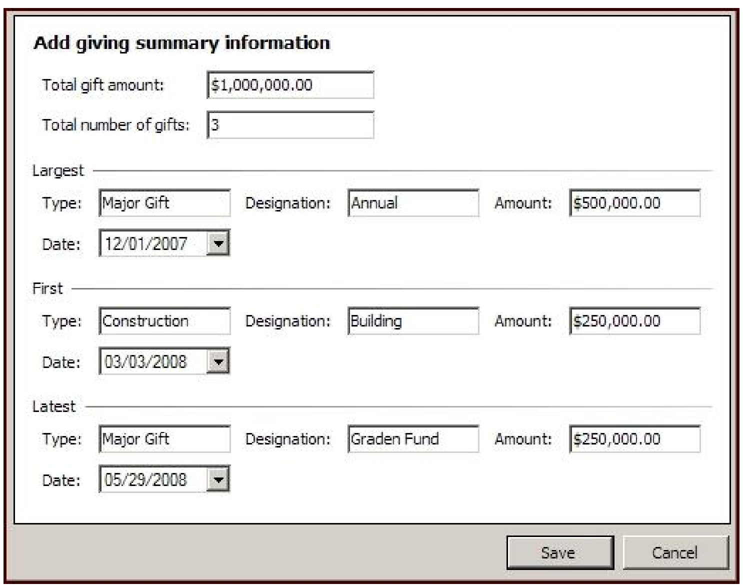
If the constituent is linked to a ***Raiser's Edge*** record, the data is synchronized with and populated from the ***Raiser's Edge*** record.

Add Giving Summary Information

If you have a large amount of giving summary information to update, you can run bulk updates using the import and batch functions. For more information, see Giving History Updates through Batch Entry on page 80.

▸ **Add prospect giving summary information**

1. From the constituent's Wealth and Ratings page, in the **More information** pane, click **Giving Summary**. The Giving Summary page appears.
2. Click **Add**. The Add giving summary information screen appears.



3. Add the necessary information. You do not have to complete all fields for each giving designation.
4. Click **Save**.

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[1] This link appears in the More information pane of the Wealth and Ratings page. This link takes you to the constituent's Giving Summary page. From this page, you can view total giving, largest gift, first gift, and latest gift information; and add, edit, and delete giving information. The page also tracks the constituent's total number of gifts.

Giving History Updates through Batch Entry

Batch Entry allows you to update and add information to your database quickly, without opening each affected record. There are two ways to use **Batch Entry** to enter data:

- The **Import** and **Batch Entry** functions help you to quickly add information contained in an outside application, such as Microsoft *Excel*, to your database (the outside file must be saved as a comma-separated value (*.csv) file). With **Import** you can create an import process that generates a batch file containing all information included in the outside file. From **Batch Entry** you can then validate and commit the batch file and add or update information in your database.

  For example, you want to update and add giving history information on several constituent records. After you have your new data saved in a CSV file format, you can import the information into the database. The import is based on a batch template created in **Batch Entry**. In the batch template, you select the batch type and workflow you want used when data is imported.
- If you do not have an import file, but you want to enter updated information quickly, without opening every record, you can use the batch process. With a batch, the program lists the selected fields (fields included in the batch template) as fields in a spreadsheet so you can efficiently enter information in the database. Like the import process, the batch requires a batch template, which specifies the fields to add or update.

Note: For information about working in **Batch Entry**, see the Batch Entry chapter in *Data Management*; for information about working in **Import**, see the Import chapter in *Data Management*.

The following **Batch type** is available when you create a giving summary batch template:

- **Giving Summary Update Batch**: Updates constituent giving history data based on information included in the import file or batch. If using an import, the import process can compare a record ID included in the import file to system lookup IDs and alternate lookup IDs. During the import process, if the application finds a match in the database, the information in the matched record is updated.

Edit Giving Summary Information

Be aware, if you have a large amount of giving summary information to update, you can run bulk updates using the import and batch functions. For more information, see Giving History Updates through Batch Entry on page 80.

Edit prospect giving summary information

1. From the constituent’s Wealth and Ratings page, in the **More information** pane, click **Giving Summary**. The Giving Summary page appears.
2. Click **Edit**. The Edit giving summary information screen appears.
3. Make the necessary changes. You do not have to complete all fields for each giving designation.
4. Click **Save**.

Delete Giving Summary Information

Be aware, if you have a large amount of giving summary information to update, you can run bulk updates using the import and batch functions. For more information, see Giving History Updates through Batch Entry on page 80.

Delete prospect giving summary information

1. From the constituent's Wealth and Ratings page, in the **More information** pane, click **Giving Summary**. The Giving Summary page appears.
2. Click **Delete**. A confirmation screen appears.
3. Click **Yes**.

Prospect Analysis

Prospect Analysis[1] tools can help Prospect Researchers and 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.

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[1]Tools that help Prospect Researchers and 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.

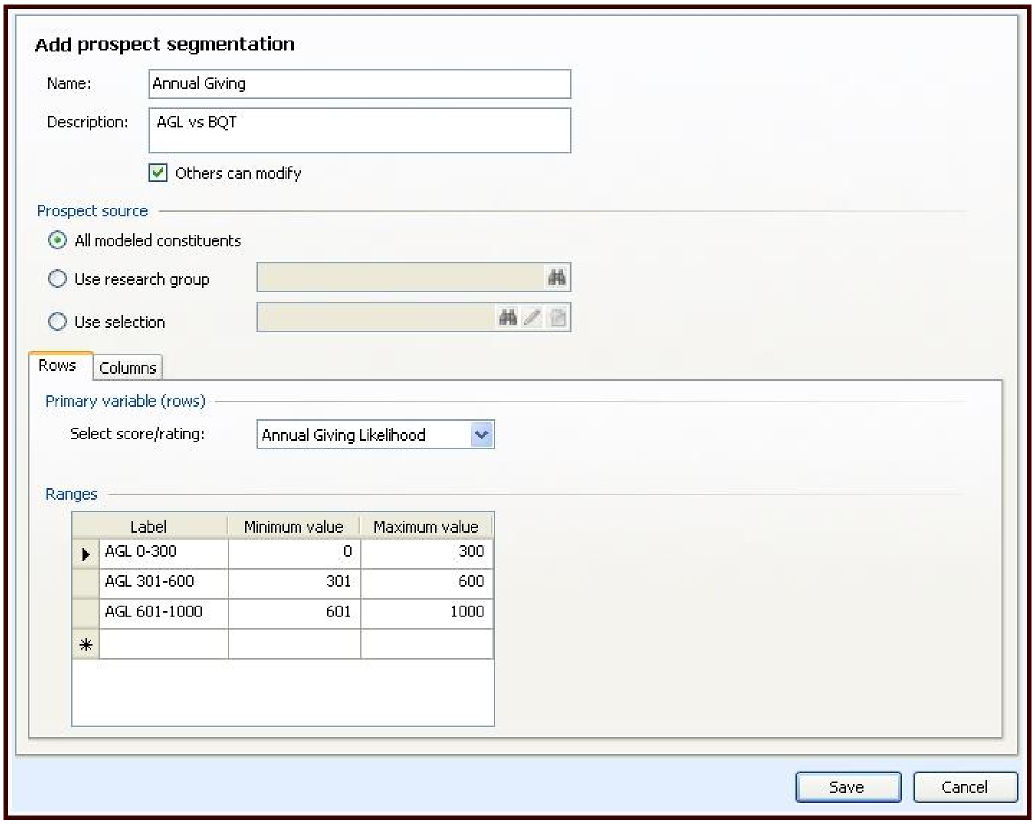
Add Prospect Analysis Dashboard

Once created, the prospect analysis dashboard definitions are stored in the **Prospect analysis dashboards** grid on the Prospect analysis page. The dashboard views can be updated at any time.

Add a new prospect analysis dashboard

1. From the Prospect analysis page, click **Add**. The Add prospect segmentation screen appears.

   Note: For information about accessing the Prospect analysis page, see Access Prospect Analysis on page 83.



2. Define your prospect analysis dashboard. For information on the fields and options included on this screen, see Add a Prospect Segmentation Screen on page 85.

   Warning: The segmentation report is designed to display values from low to high, so make sure you enter your column and row information to correspond with this rule. For example, if you select Annual giving likelihood for rows, in the **Ranges** grid, make sure your first entry is the lowest AGL rating you want included in the report. The next grid entry should be the second lowest and so on.

3. Click **Save**. You return to the Prospect analysis page. The new dashboard displays in the **Prospect analysis dashboard** grid.

Research List Search Screen

Enter the information on which you want to base your Research List search. You can enter all or part of the **Name** of the group and/or the individual identified as the **Owner** of the groupl. If you want any information entered in the **Name** and/or **Owner** field matched exactly, select **Match all criteria exactly**. If you do not select this option partial matches are included in the search results.

Edit Prospect Analysis Dashboards

You can make changes to existing dashboard definitions stored in the **Prospect analysis dashboards** grid on the Prospect analysis page. The dashboards can be updated at any time.

Edit an existing prospect analysis dashboard

1. From the Prospect analysis page, in the **Prospect analysis dashboards** grid, select the dashboard definition you want to edit.

   Note: For information about accessing the Prospect analysis page, see Access Prospect Analysis on page 83.

2. Click **Edit**. The Edit prospect segmentation screen appears.
3. Make any necessary changes. The Edit prospect segmentation screen includes the same fields and options included on the Add prospect segmentation screen. For information on the fields and options included on this screen, see Add a Prospect Segmentation Screen on page 85.
4. Click **Save**. You return to the Prospect analysis page. The edited dashboard displays in the **Prospect analysis dashboards** grid.

Add a Prospect Segmentation Screen

Warning: Custom ratings added by your organization are not available as variables in your prospect analysis dashboard.

Screen Item	Description
Name	You must name the prospect analysis dashboard. The name appears in the **Prospect analysis dashboard** grid on the Prospect analysis page.
Description	You can enter a description of the dashboard to help you identify it later. The description appears in the **Prospect analysis dashboard** grid on the Prospect analysis page.
Others can modify	Select if you want to allow other users to make changes to this definition.
Prospect source	Select the constituents you want to include in your dashboard. **All modeled constituents**: Any constituent in your database with modeling or rating information that satisfies the variables selected. **Use Research List:** Any constituent included in the selected Research List with modeling or rating information that satisfies the variables selected. **Use selection**: Any constituent included in the chosen query selection with modeling or rating information that satisfies the variables selected.

Screen Item	Description
Rows tab	Define the rows to be included in the Prospect Analysis[1] cross tabs report: • **Select score/rating**: Select the score or rating variable on which you want to base the rows displayed in your report. Ratings added by your organization are not available as variables. Also, you cannot select the same score or rating used on the Columns tab. • **Ranges**: You must define at least one row using the columns provided in the **Ranges** frame. Each row must include a **Label**, **Minimum value**, and **Maximum value**. For example, if you select “Annual Giving Likelihood” in the **Select score/rating** field, for ranges to display in your report rows, you can enter “AGL 0-300” as a row **Label**, “0” as a **Minimum value**, and “300” as a **Maximum value**. To the right side of the **Ranges** grid, use the up and down arrows to arrange entries in the grid. You must select the entire row you want to move to activate the arrows
Columns tab	Define the columns to be included in the Prospect Analysis[2] cross tabs report: • **Select score/rating**: Select the score or rating variable on which you want to base the columns displayed in your report. You can select two scores or ratings to include in the column head, but at least one is required. Ratings added by your organization are not available as variables. Also, you cannot select the same score or rating used on the Rows tab. • **Ranges**: You must define at least one dashboard column using the columns provided in the **Ranges** frame. Each column must include a **Label**, **Minimum value**, and **Maximum value**. The same is true if you select a second score or rating. For example, if you select “Planned Giving Likelihood” in the **Select score/rating** field, for ranges to display in your report columns, you can enter “PGL 600-1000” as a column **Label**, “600” as a **Minimum value**, and “1000” as a **Maximum value.** If you select a second score or rating in the **OR** field, you must similarly complete the corresponding **Ranges** grid, entering a **Label**, **Minimum value**, and **Maximum value** for the **OR** entry. In addition, if you enter two secondary variables, each must contain the same number of entries in the corresponding **Ranges** grids. To the right side of the **Ranges** grids, use the up and down arrows to arrange entries in the grid. You must select the entire row you want to move to activate the arrows.

Edit Prospect Segmentation Permissions

You can restrict application users ability to modify existing prospect segmentations. From the prospect segmentation record, in the **Tasks** pane, click **Edit permissions**. The Edit prospect segmentation permissions screen appears.

Note: For information about accessing the prospect segmentation record, see View a prospect analysis dashboard on page 88.

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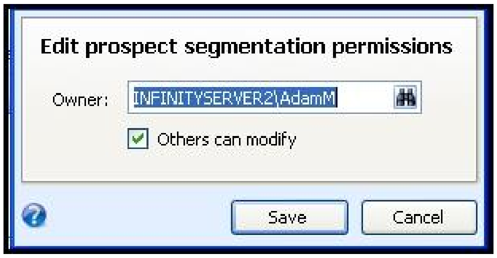
[1]Tools that help Prospect Researchers and Development Officers determine who and how much to ask for a gift. The prospect segmentation report is used to segment constituents in your database, identifying prospects that satisfy specified modeling scores or ratings and aiding in the development of a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

[2]Tools that help Prospect Researchers and 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.



In the **Owner** field, click the binoculars to access the Application users search screen. From this screen, you can assign an owner. Mark the **Others can modify** checkbox if you want to allow anyone other than the assigned owner to make changes. Click **Save** to save the permissions.

Delete Prospect Analysis Dashboards

You can permanently remove existing dashboard definitions stored in the **Prospect analysis dashboards** grid on the Prospect analysis page.

Delete an existing prospect analysis dashboard

1. From the Prospect analysis page, in the **Prospect analysis dashboards** grid, select the dashboard definition you want to delete.

   Note: For information about accessing the Prospect analysis page, see Access Prospect Analysis on page 83.

2. Click **Delete**. A confirmation screen appears.
3. Click **OK** to remove the dashboard and return to the Prospect analysis page. The deleted dashboard no longer displays in the **Prospect analysis dashboards** grid.

Update Prospect Analysis Dashboards

Once a dashboard definition is in place and saved in the **Prospect analysis dashboards** grid on the Prospect analysis page, you can update the dashboard at any time. The **Status** column in the **Prospect analysis dashboards** grid tells you when an update is required for a specific dashboard definition.

Update a prospect analysis dashboard

1. From the Prospect analysis page, in the **Prospect analysis dashboards** grid, select the dashboard you want to update.
2. Click **Update dashboard**. A confirmation screen appears.

   Note: For information about accessing the Prospect analysis page, see Access Prospect Analysis on page 83.

3. Click **Yes**. The dashboard is updated to include the most up-to-date information.

View Prospect Analysis Dashboards

You must define and update your dashboard before you can view the results. For information about creating a dashboard definition, see Add Prospect Analysis Dashboard on page 84; for information about updating a dashboard, see Update Prospect Analysis Dashboards on page 87.

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**[1] page, in the **Prospect analysis dashboards** grid, select the dashboard you want to view.

Prospect Segmentation Page

The Prospect segmentation page displays the results of your dashboard definitions in a cross tab format.

Print Prospect Analysis Dashboards

Print a selected prospect analysis dashboard

1. From the dashboard, open the right-click menu or select the print icon on the dashboard toolbar.

   Note: For information about accessing a dashboard, see View Prospect Analysis Dashboards on page 88.

2. To preview the print version of the dashboard, select **Print Preview**.
3. To edit the print parameters including printer, orientation, paper size and source, and margins, or to print the dashboard, select **Page**.

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

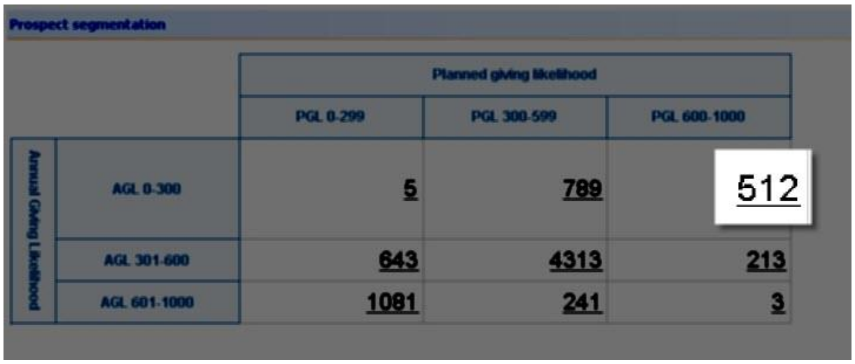
A segment page displays the selected segment's properties; date, source, owner, and description information; and a list of the prospects included in the selected segment.

[1] Tools that help Prospect Researchers and 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.

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.

Save Segment Prospects to Research List

You can save all prospects in a selected segment to a new or existing Research List.

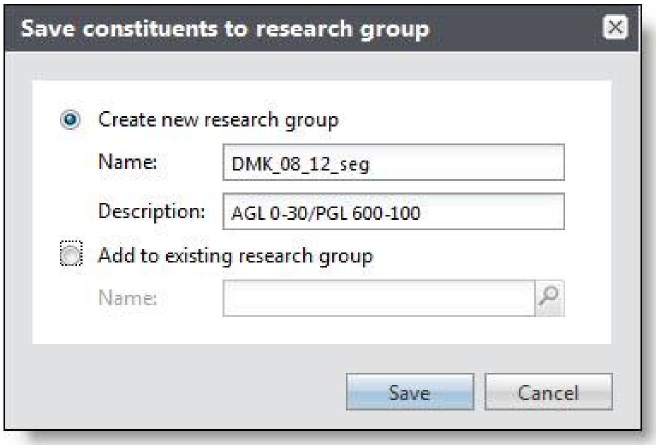
Note: For information about Research Lists, see the Research Lists on page 93.

Save segment prospects to a new or existing Research List

1. From the segmentation dashboard, open the segment page.

   Note: For information about accessing a segment page, see Access Segmentation Page on page 89.

2. Click **Save constituents** and select **Research List**. The Save constituents to Research List screen appears.



3. To save the prospects to a new Research List, select **Create a new Research List** and enter a name and description.

   To add the prospects to an existing Research List, select **Add to existing Research List** and click the binoculars in the **Name** field to search for the Research List you want to use.

4. Click **Save**.

Save Segment Prospects to Selection

You can save all prospects in a selected segment to a new or existing Research List.

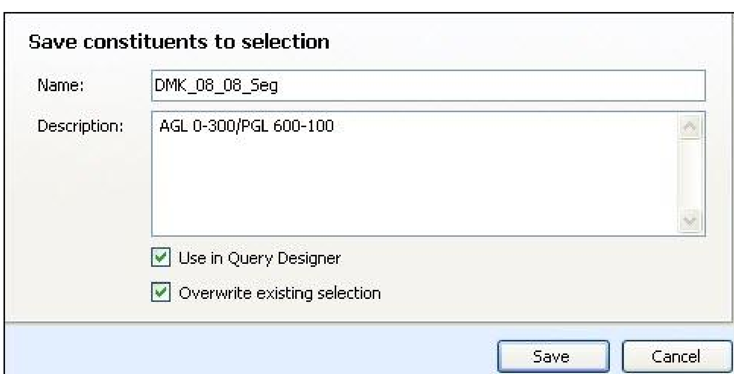
Note: For information about selections, see the Query chapter in the *Query and Export Guide*.

▸ Save segment prospects to a new or existing Research List

1. From the segmentation dashboard, open the segment page.

   Note: For information about accessing a segment page, see Access Segmentation Page on page 89.

2. Click **Save constituents** and select **Selection**. The Save constituents to selection screen appears.



3. Enter a enter a name and description.

4. You can also choose to make the new selection available for use in Query Designer and to overwrite any existing selection that shares this selection name.

5. Click **Save**. The next time you visit **Query**, the new selection displays in the **Constituent** frame of the Selections tab.

Delete Prospect Segmentation

While working on a Prospect Segmentation page, you can delete the opened segmentation dashboard by clicking **Delete prospect segmentation** in the **Tasks** pane.

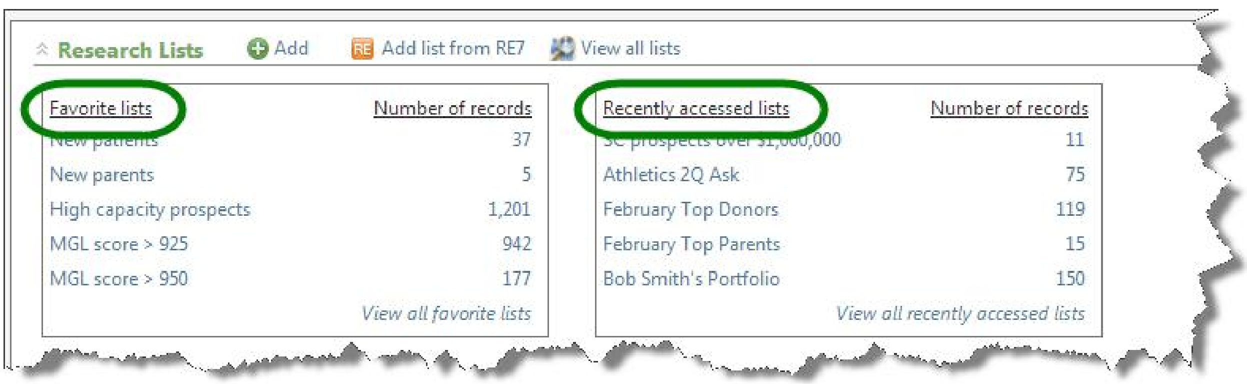
Research Lists

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

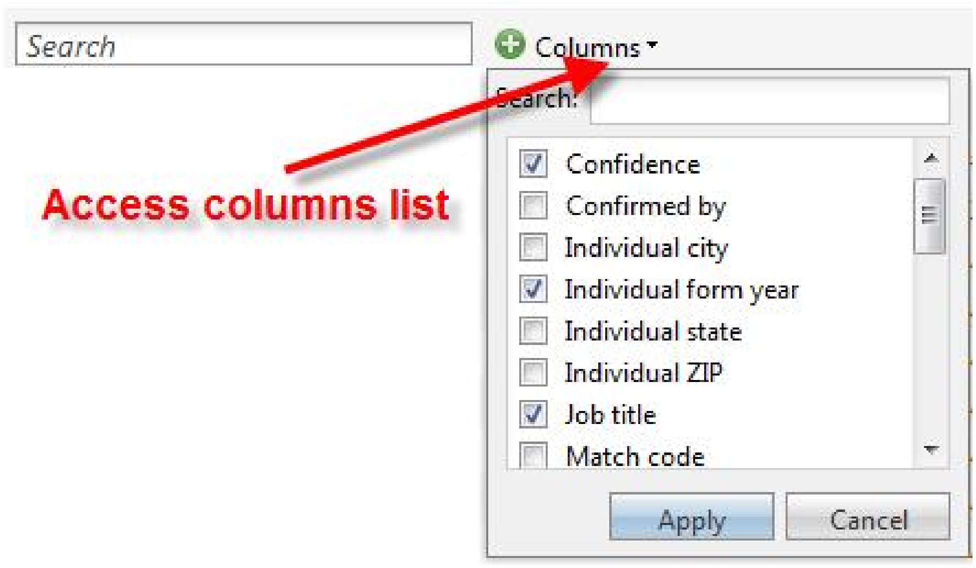
You access the research list functionality from the Prospects page, in the **Research Lists** section, by clicking **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed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



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

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.

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	

List View Column	Category	Field Type	Note
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	

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

List View Columns	Category	Field Type	Notes
Major Giving Likelihood	Ratings	#	
Membership Likelihood	Ratings	#	
Online Giving Likelihood	Ratings	#	
Patient Response Likelihood	Ratings	#	
Planned Giving Likelihood	Ratings	#	
Suggested Membership Level	Ratings	$	
Suggested Membership Level Score	Ratings	#	
Target Gift Range	Ratings	$	
Target Gift Range Score	Ratings	#	

Wealth Group Fields

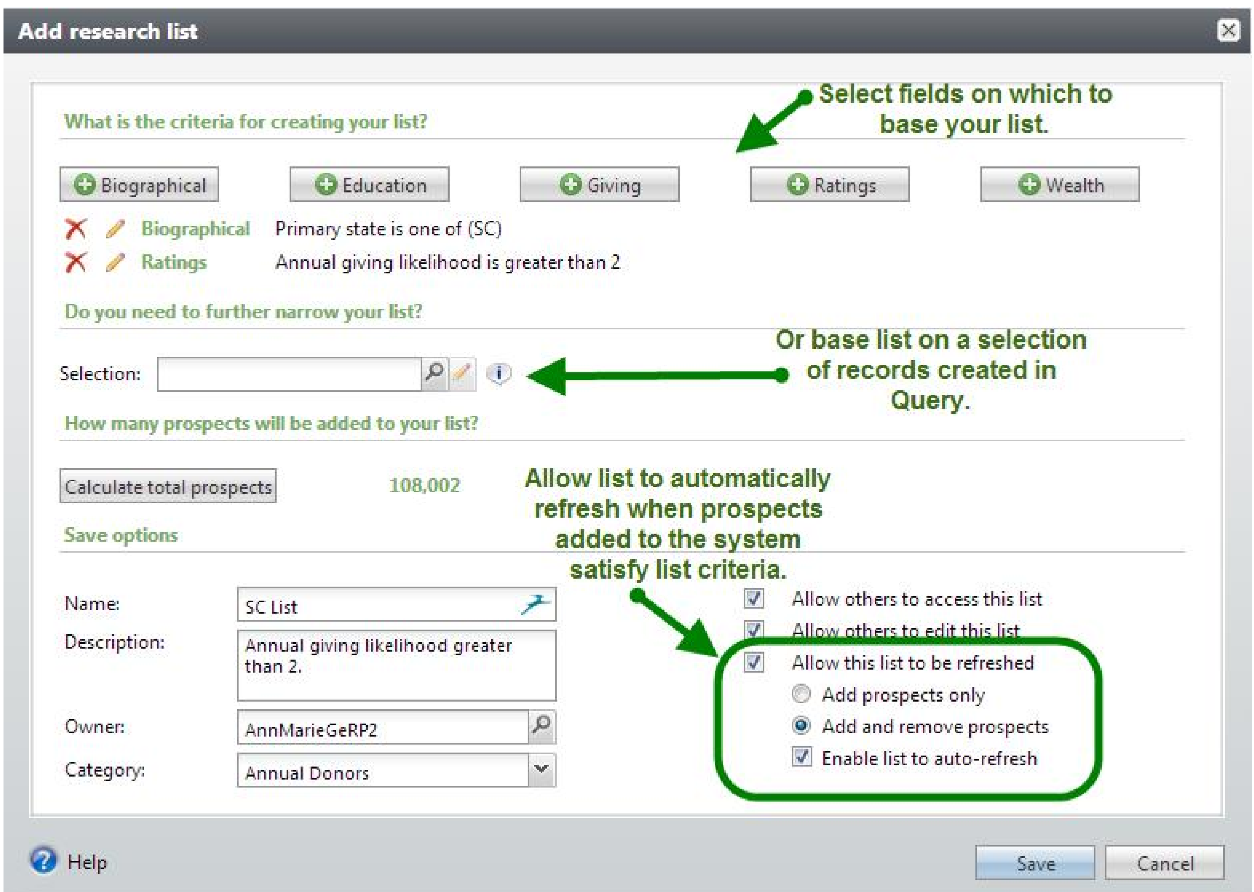
List View Columns	Category	Field Type	Notes
Business company valuation	Wealth	$	
Business confirmed value	Wealth	$	
Business identified value	Wealth	$	
Business job title	Wealth	$	
Estimated wealth value	Wealth	$	
Income/compensation confirmed value	Wealth	$	
Income/compensation identified value	Wealth	$	
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	$	

List View Columns	Category	Field Type	Notes
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 95.

   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 95.

   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.

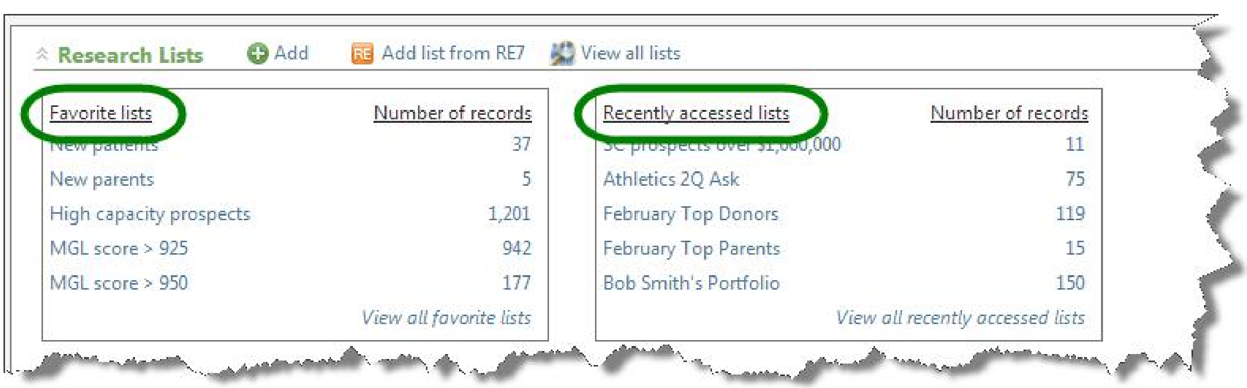
2. In the Research Lists grid, expand the list you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to delete the group and return to the Research Lists page.

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.

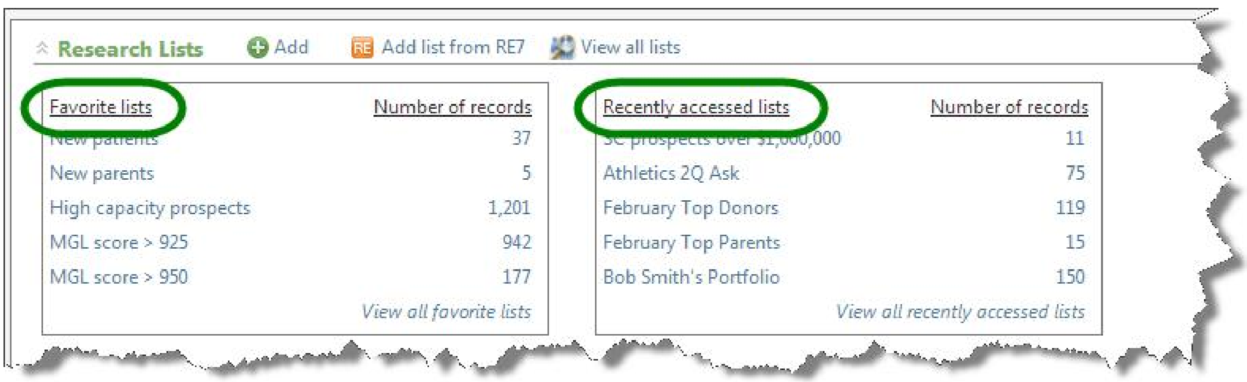
Run a Wealth Screen on Research List

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

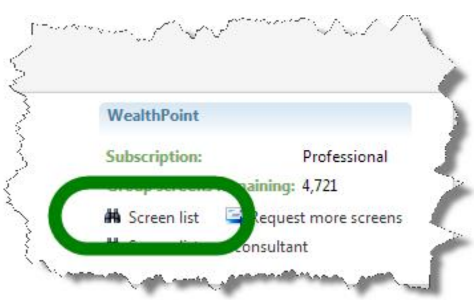
When updating ***WealthPoint*** information, the system does not override any manually entered data you stored on a given prospect. For example, if you entered real estate information for Mark Adamson and real estate information is included in the ***WealthPoint*** screen, whatever information you entered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

Wealth screen all members of 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. 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 you want to screen. The selected Research List appears.
3. In the summary section at the top of the page, click **Screen list.**

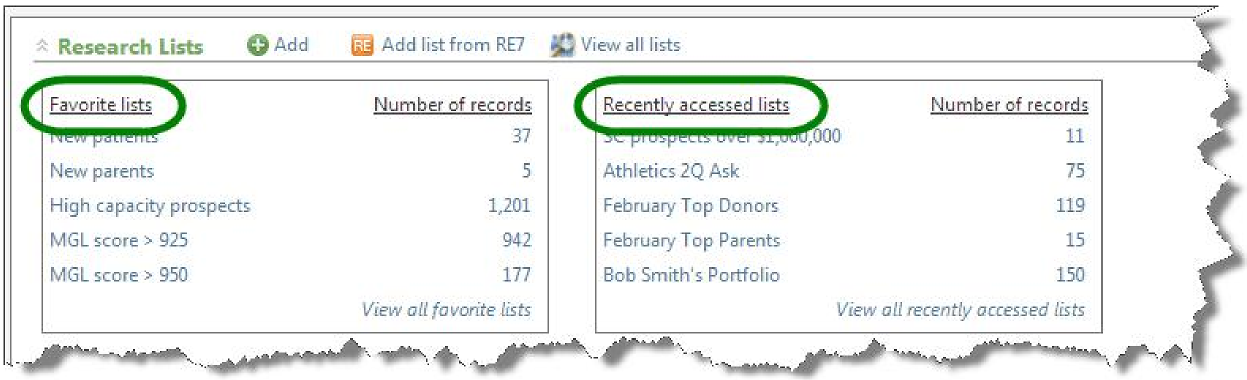


4. A confirmation screen appears. Click **Yes** to continue.

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

Wealth screen selected members of a research list

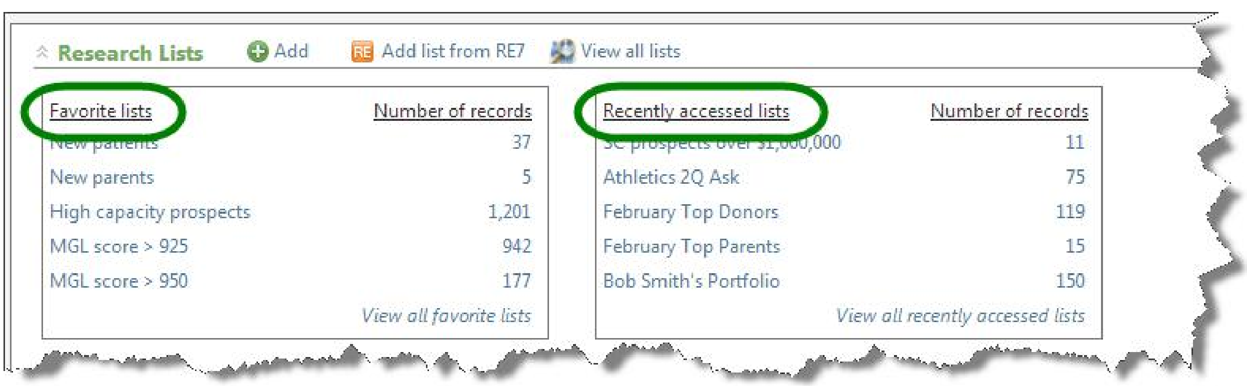
1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.



2. 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, select the members you want to screen.
4. Near the top of the **Members** grid click **Screen (number selected)**.

Track number of remaining group screens

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



2. From the **Research Lists** grid on the Research Lists page open a list by clicking on the list name in the **Name** column.
3. On the top right.side of the page, the **Group screens remaining** field displays the number of group screens you have left.

Request more screens

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

or select from a list of recently accessed lists.

2. From the **Research Lists** grid on the Research Lists page open a list by clicking on the list name in the **Name** column.
3. On the top right.side of the page, click **Request more screens.** The Request more screens screen appears.
4. Enter the number of screens you want to purchase.
5. Click **OK**. An email message is created to solutions@blackbaud.com that includes you site information and the number of additional screens you want.

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

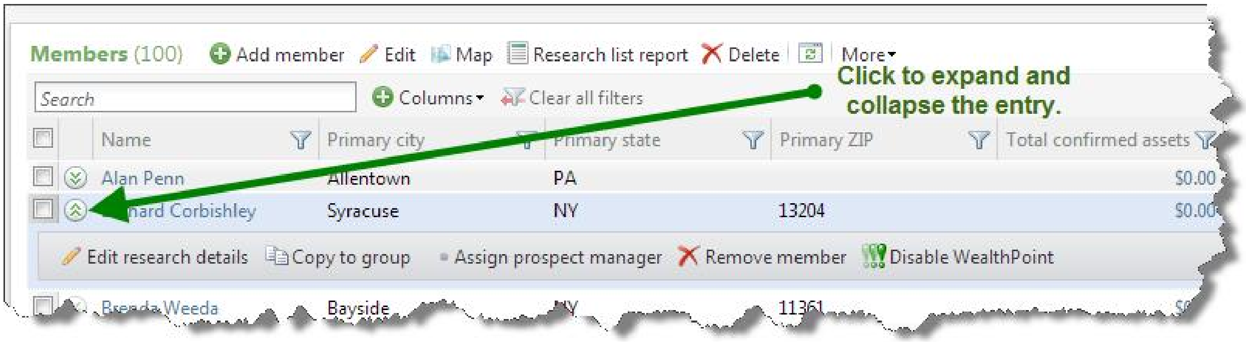
1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

   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 93.

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.

▸ Edit an individual member's status from 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. 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 update.
4. Click **Edit research details**[1]. The **Edit research details**[2] screen appears.
5. Enter the prospect's status.
6. Click **Save** to save the change and close the screen.

---

[1]If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

[2]If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

Enter research summary information for an individual member of 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. 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 update.
4. Click **Edit research details**[1]. The **Edit research details**[2] screen appears.
5. Enter the summary information in the **Research summary** box.
6. Click **Save** to save the change and close the screen.

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.

---

[1] If you discover you must change the prospect manager assigned to a prospect or change the prospect's status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

[2] If you discover you must change the prospect manager assigned to a prospect or change the prospect's status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

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.

▶ Disable/Enable WealthPoint screen on selected members of you list

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.
2. 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 disable.
4. Click **Disable WealthPoint**. A confirmation screen appears.
5. To enable, click **Enable WealthPoint**.

▶ Edit prospect manager from 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. 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 update.
4. Click **Assign prospect manager**. The Assign a prospect manager screen appears.
5. Select a manager.
6. Click **Save** to save the change and close the screen.

   OR

7. If you need to assign the same manager to several members, in the **Members** grid, select the members you want to include in the assignment.
8. Near the top of the **Members** grid click **Assign prospect manager (number selected)**. The Assign a prospect manager screen appears.
9. Select a manager.
10. Click **Save** to save the change and close the screen.

Map locations of research list members

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

2. 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 map list members from the Research Lists page by expanding the list you want to map and clicking **Map**.

3. In the **Members** grid, click **Map**. The Mapping page appears displaying the members locations.

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**[1] 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] A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.

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.

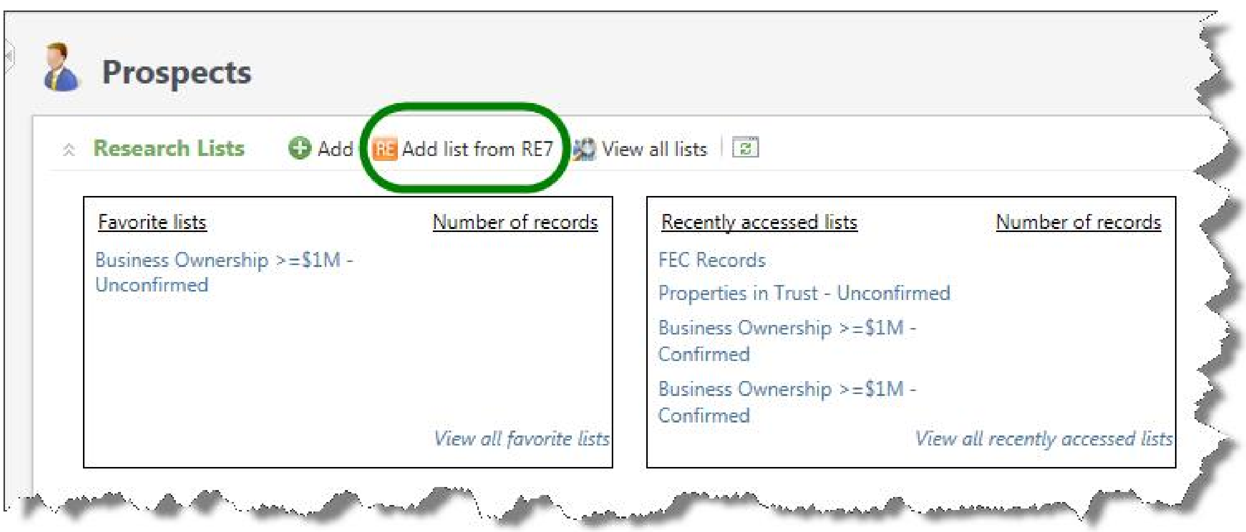
Import Research List from The Raiser's Edge

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 114; for information about linking records, see Link Group Members with The Raiser's Edge on page 113.

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.

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, Research List); enter request information such as priority, type of research, reason for request, and much more; and track the results.

> ***Note:*** *Enterprise Constituent Record Management* users can also include event registrants in a research request.

When you create a request, several request records are created: one for the overall request and additional request records for each individual included in the request. For example, if you create a “Constituent” request and add three individuals to the **Prospects to research** grid on the add screen, a record is created for the general constituent request and three additional records are created for each individual you listed in the grid. Research officers can then address each individual record when they complete work on the constituent research request.

Prospect Research Request Workflow

- Gift officer determines he needs additional research data for a specific prospect
- Gift officer uses the **Add a Prospect Research Request** tool included in *Prospects* and submits his request for information about the prospect
- After submitting, the gift officer tracks the request activity from the Research Requests tab on his fundraiser record. From here, he can also access the research request record, edit or cancel the existing record, and add a new request.

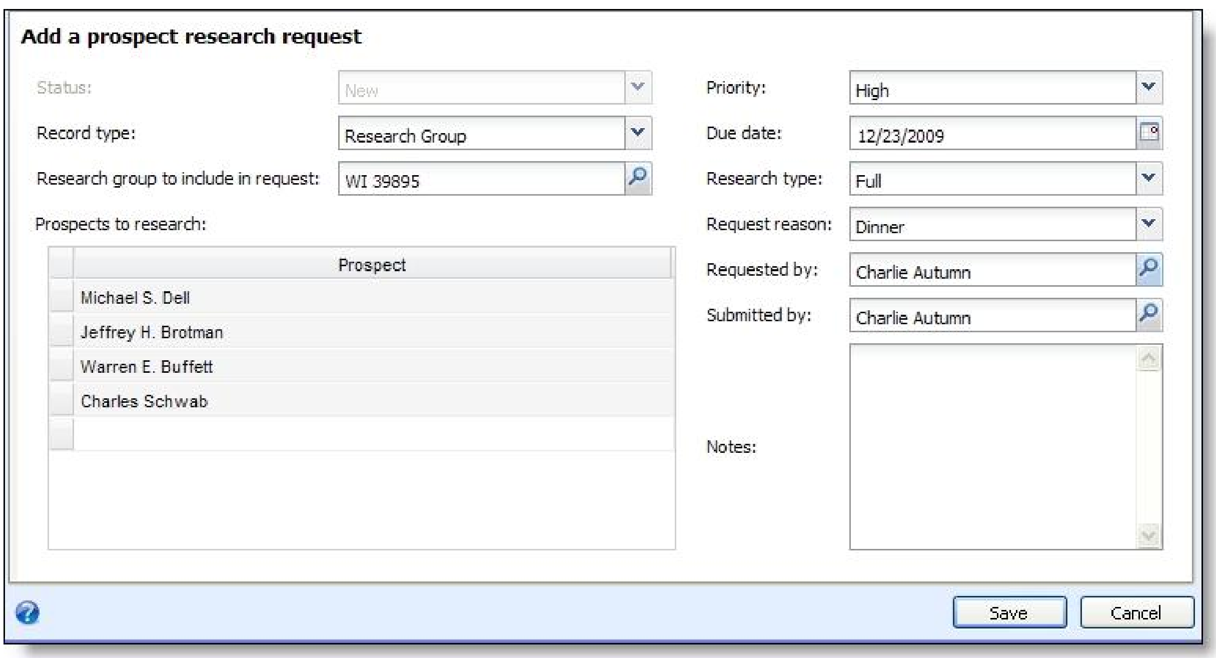
- Director of prospect research tracks, prioritizes, assigns, and generally manages prospect research requests from Research Request Management page. For more information, see Manage Submitted Research Requests on page 125.
- Once the research is complete and ready for the gift officer, the director of prospect research designates it “Complete” from the Research Request Management page. This designation is reflected on the Research Requests tab of the fundraiser who submitted and requested the data.

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.
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 a Specific Prospect Request

After you create and submit a request, you can edit the request parameters for selected constituents included in the request. For example, if you submit a request for a Research List but you want a different **Research type** associated with one of the group members, you can make this change from the research request record. You can change **Priority**, Due date, **Research type**, **Request reason**, and **Notes**.

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 single prospect record included in the request, select the Prospects tab, expand the record you want to change, and click **Edit**. The Edit a prospect research request screen appears.

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.

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**.

Add Prospects to Research Request

Constituent record requests allow you to add constituents after the request is submitted.

You cannot add new constituents to event or group requests if they are not part of the selected Research List. You can, however, add back deleted constituents. For example, if when creating your request you delete two group members and later decide you want to add one or both back to your request, you can do so with the **Add prospects to request** option. Or, if additional constituents have been recently added to the Research List, these may also be added to the request with **Add prospects to request**.

Add prospects to an existing research request

1. From the Research Request page, under **Tasks**, click **Add prospects to request.** The Add prospects to a research request screen appears.

   You cannot change the **Status** from this screen.

2. In the **Prospects to add** grid, add the new prospect. Click the search icon at the end of the field to access the Constituent Search screen.

3. You can also enter a **Priority**, **Due date**, **Research type**, **Request reason**, and **Notes** for the additional prospects. For more information about these options, see Add a Prospect Research Request Screen on page 119.
4. Click **Save**. You return to the Research Request screen. Your newly added prospects display in the **Prospects** grid.

Cancel a Specific Prospect Request

After you create and submit a request, you can cancel a selected prospect included in the request. This keeps the existing request in place but removes the selected prospect.

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

To cancel a specific prospect from an existing prospect research request, from the Research Request page, select the Prospects tab. In the **Prospects** grid, select the prospect you want to cancel and click **Cancel**. A confirmation screen appears. Select a **Reason** for canceling the request and enter any necessary **Notes**. Reasons are created in **Code tables** in *Administration.* Click **Save** to complete the process. The canceled constituent is removed from the **Prospects** grid.

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.

Delete an Existing Research Request

After you create and submit a request, you can delete the request. This removes the request from the system.

Warning: Once you delete a request, the delete action cannot be undone.

To delete an existing prospect research request, from the Research Request page, under **Tasks**, select **Delete request**. A confirmation screen appears. Click **Yes**. The request is removed from the system and you return to the Prospects page.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

Add an attachment

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types. If you have security rights, click **Type** to add an attachment type.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**.

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

Edit an attachment

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file** To remove an attachment, click **Clear file** To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

Delete an attachment

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types. If you have security rights, click **Type** to add a media link type.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

Edit a media link

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

Delete a media link

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types. If you have security rights, click **Type** to add a note type.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

Edit a note

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select a note and click **Edit**. The Edit note screen appears.

3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

Delete a note

1. Go to the Documentation tab of a record.

   For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Select a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

Select the attachment and click **Open file**.

Research Request Record

After you create and submit a prospect research request, the system generates a Research Request record. The record is composed of two tabs: the Prospects tab and the Documentation tab. It also includes a research request summary section.

Note: There are two main pieces to a research request - the main request and the individuals included in the request. For example, if you create a request for a group and the group has 10 members, when you submit the request 10 different requests are created off the main request - one request for each individual. Should you access the prospect request record for just one of these individuals rather than the main request, the record does not include the Prospects tab. The summary section and Documentation options are available for the individual.

The summary section provides an overview of the request, displaying the status, priority, request date, number of constituents, and much more.

The Prospects tab displays all constituents included in the request. From here, you can also perform the following tasks:

Manage Submitted Research Requests

After a gift officer submits a research request, the prospect research department accesses and manges the requests from the Research Request Management page. This page is accessed by clicking **My prospect research page** from *Prospects* or by clicking **My prospect research page** from the Research Request page.

Depending on your role and security settings you may see only research requests assigned to you or you may see all assignments.

From this page, you manage both pieces of the research request - the main request and the individuals included in the main request. You also can track completed requests from this page.

- For information on managing the main requests, which includes all individuals included in the request, see Open Requests on page 126.
- For information on managing the individual requests included within a main request, see Open Individual Request on page 129.
- For information on tracking completed requests, see Completed Requests on page 134.

Open Requests

All requests are listed on the Request Queue tab of the Research Request Management page. Unlike the Individual Request tab also included on this page, the Request Queue tab allows you to deal with the request group - all individuals in the group are treated as one - instead of individually with each constituent included in the request group. If you prefer dealing with the request on the individual level, see Open Individual Request on page 129.

View open research requests

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. You can filter information displayed on this tab based on **Researcher**, **Request date**, **Due date**, and **Status**. Click **Apply** to filter the display.

Research Request Record

After you create and submit a prospect research request, the system generates a Research Request record. The record is composed of two tabs: the Prospects tab and the Documentation tab. It also includes a research request summary section.

Note: There are two main pieces to a research request - the main request and the individuals included in the request. For example, if you create a request for a group and the group has 10 members, when you submit the request 10 different requests are created off the main request - one request for each individual. Should you access the prospect request record for just one of these individuals rather than the main request, the record does not include the Prospects tab. The summary section and Documentation options are available for the individual.

The summary section provides an overview of the request, displaying the status, priority, request date, number of constituents, and much more.

The Prospects tab displays all constituents included in the request. From here, you can also perform the following tasks:

Change the researcher currently assigned to an open research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to change.

4. Click **Change status** and select **Assigned**. The Assign request to a researcher screen appears displaying the researcher currently assigned.
5. In the **Researcher** field, select the new fundraiser you want to assign as a researcher for this request. Click the search icon in the field to access the Fundraiser Search screen.
6. If you want all individuals included in the request assigned to this researcher, select **Assign individual requests to the same researcher**. If you would rather assign each individual separately, do not select this option. You can assign each individual request from the Individual Requests tab on the Research Request Management page.
7. Click **Save** to return to the Individual Requests tab.

Unassign a researcher from an open research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to unassign.
4. Click **Change status** and select **Pending**. The researcher is removed from the request and the status changed to “Pending.”

Designate an open research request as “In progress”

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to designate as “In progress.”
4. Click **Change status** and select **In progress**. The status changes to “In progress.” The **Complete request** option is also activated. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as “In progress.”

Designate an open research requests as “Complete”

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to designate as “Complete.”
4. Click **Complete request**. A confirmation screen appears.
5. Click **Yes**. The status changes to “Complete,” and the request is moved from the Request Queue tab to the Completed Requests tab. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as “Complete.”

Reject an open research requests

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to reject.

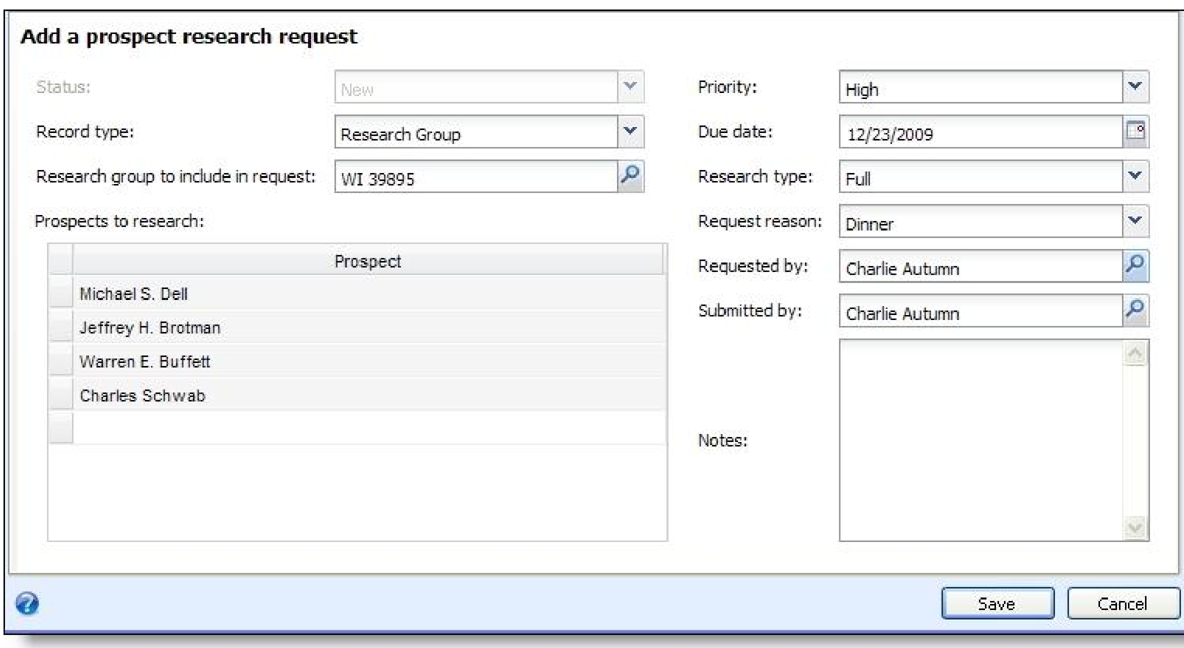
4. Click **Reject request**. The Reject a prospect research request screen appears.
5. In the **Reason** field, select a reason for rejecting the request. Reasons are created in **Code tables** in *Administration.*
6. In the **Comments** box, enter any additional information you want to include with the rejected request.
7. Click **Save**. The status changes to “Rejected.” In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as rejected.

View research requests record

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Click on the request for which you want to view the research request record. The Research Request page appears. For information about working on this page, see Manage Prospect Research Requests on page 119.
4. To return to the Research Request Management page, click **Back**.

Add a new research request from the Research Request Management page

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab.
3. Click **Add**. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.



4. Select the **Record type** for which you are requesting information.
5. Depending on the **Record type** select, you next must select the constituent or Research List for which you want information. For example, if you select the “Research List” **Record type,** the **Research List to**

include in request field appears. Search for and select the group. After you select the group, the **Prospects to research** grid populates to include all group members.

Warning: The constituent (individual or organization) or Research List for which you are requesting information must exist in your database before you can create a prospect research request.

6. Enter any additional information you want to provide with the request, such as a priority, due date, or reason. For more information about the fields and options included on this screen, see Add a Prospect Research Request Screen on page 119.
7. Click **Save**. The new research request now displays in the **Open research requests** grid.

Edit an existing prospect research request

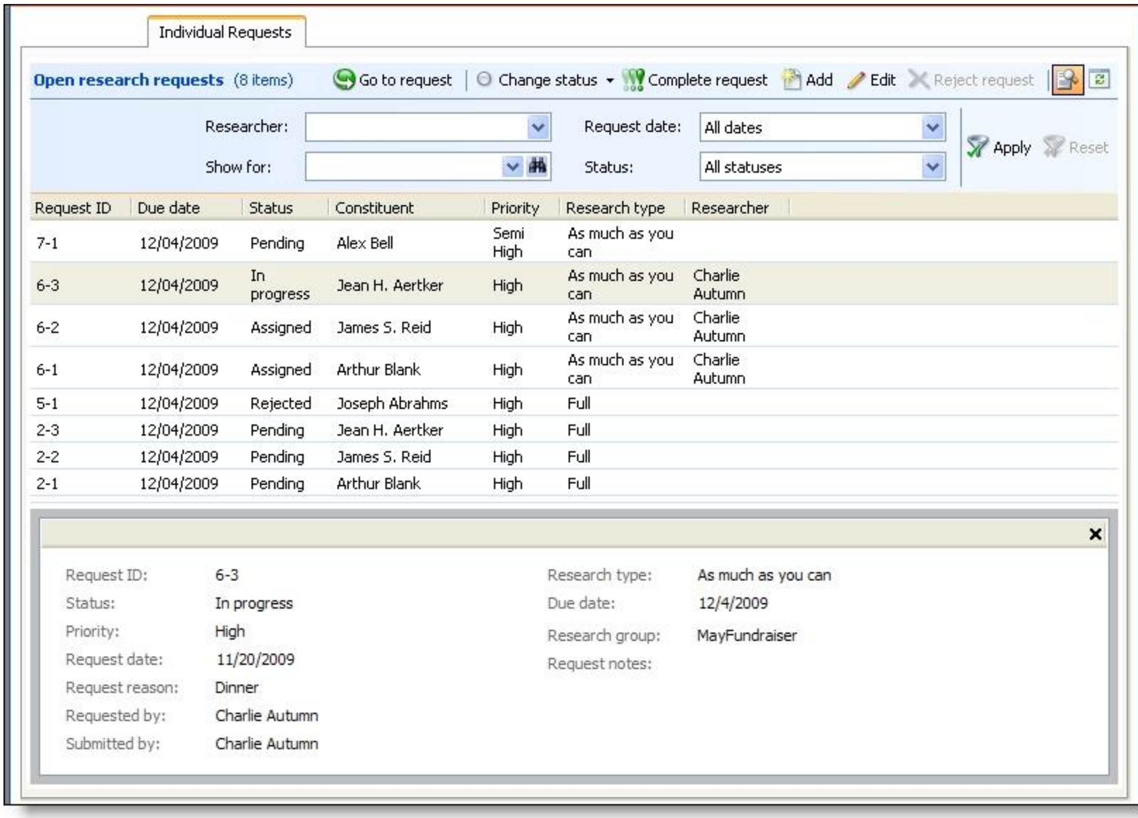
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab.
3. In the Open research requests grid, select the request you want to edit.
4. Click **Edit**. The Edit a prospect research request screen appears.
5. The constituent's **Status** and **Record type** cannot be changed. You can change the following options: **Priority, Due date**, **Research type**, **Request reason**, **Requested by**, **Submitted by**, and **Notes**. For information about these options, see Add a Prospect Research Request Screen on page 119.
6. Select **Copy research request information to linked individuals requests** if you want the information in the edit form copied to any of the individual requests created off the main request. The information copies if those individual requests are linked and not completed or canceled.
7. Click **Save** to save the changes.

Open Individual Request

All individual constituents associated with research requests are listed on the Individual Requests tab of the Research Request Management page. Unlike the Request Queue tab, the Individual Requests tab allows you to deal separately with each individual included in a request instead of the request as a whole. If you prefer dealing with the request as a whole, see Open Requests on page 126.

View open individual research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open requests display in the **Open research requests** grid.



3. You can filter information displayed on this tab based on **Researcher**, **Request date**, **Due date**, and **Status**. Click **Apply** to filter the display.

Assign researcher to open individual research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to assign.
4. Click **Change status** and select **Assigned**. The Assign request to a researcher screen appears.
5. In the **Researcher** field, select the fundraiser you want to assign as a researcher for this individual. If you are associated as a fundraiser with an application user in the system, your name defaults in the **Researcher** field, but the entry can be edited. Click the search icon in the field to access the Fundraiser Search screen.
6. Click **Save** to return to the Individual Requests tab. The individual's status is changed to "Assigned."

Change the researcher currently assigned to an open individual research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to change.

4. Click **Change status** and select **Assigned**. The Assign request to a researcher screen appears displaying the researcher currently assigned.
5. In the **Researcher** field, select the new fundraiser you want to assign as a researcher for this individual. Click the search icon in the field to access the Fundraiser Search screen.
6. Click **Save** to return to the Individual Requests tab.

Unassign a researcher from an open individual research request

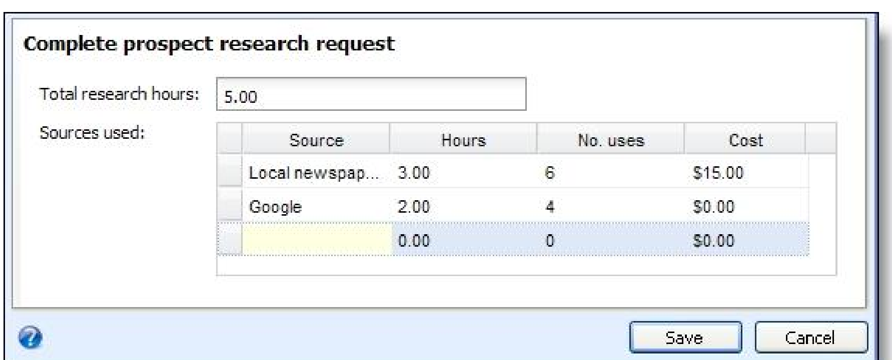
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Request tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to unassign.
4. Click **Change status** and select **Pending**. The researcher is removed from the request and the status changed to “Pending.”

Designate an open individual research request as “In progress”

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Request tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to designate as “In progress.”
4. Click **Change status** and select **In progress**. The status changes to “In progress.” The **Complete request** option is also activated. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the individual request as “In progress.”

Designate an open individual research request as “Complete”

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Request tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to designate as “Complete.”
4. Click **Complete request**. The Complete prospect research request screen appears.



5. Record information about how the research was completed:
   - **Total research hours**: The total amount of time spent completing the research.
   - **Source** column: Where you located the information.
   - **Hours** column: How much time you spent with the corresponding **Source**.
   - **No. uses** column: Number of times you used the source for this research project.
   - **Cost** column: How much did you spend using the corresponding **Source**.
6. Click **Save**. The status changes to "Complete." In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as "Complete."

Reject an open individual research request

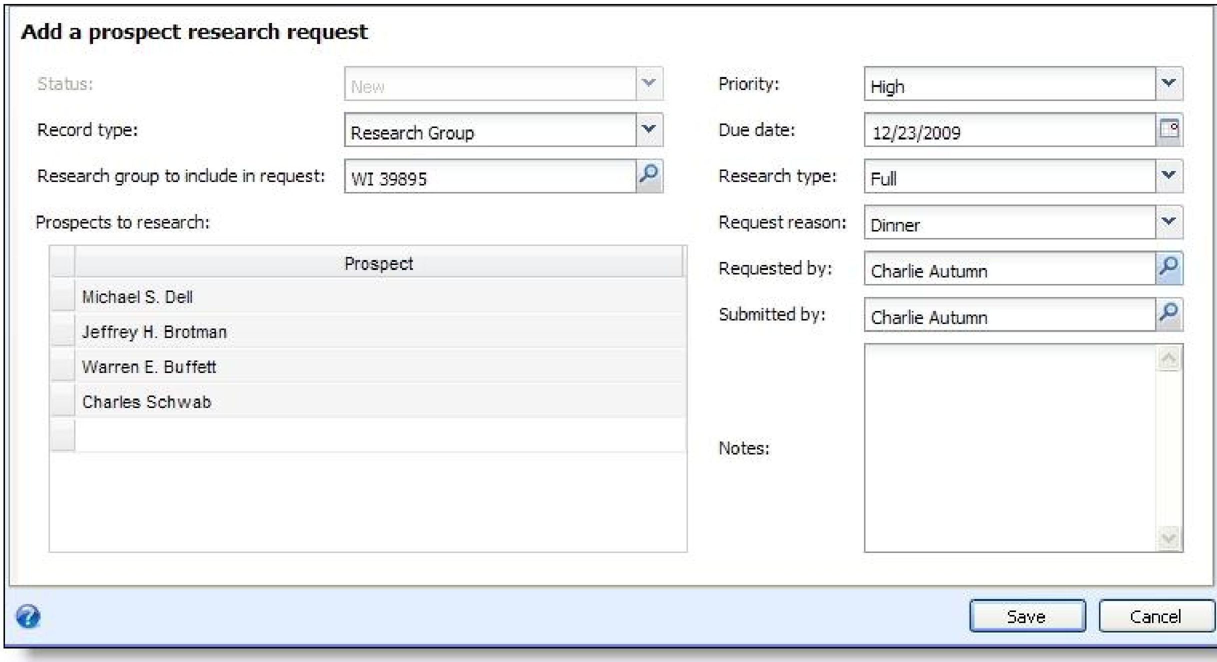
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to reject.
4. Click **Reject request**. The Reject a prospect research request screen appears.
5. In the **Reason** field, select a reason for the rejected request. Reasons are created in **Code tables** in *Administration.*
6. In the **Comments** box, enter any additional information you want to include with the rejected request.
7. Click **Save**. The status changes to "Rejected." In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as rejected.

View research request record

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open individual requests display in the **Open research requests** grid.
3. Click on the request for which you want to view the research request record. The Research Request page appears.
4.
5. To return to the Research Request Management page, click **Back**.

Add a new individual research request from the Research Request Management page

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab.
3. Click **Add**. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.



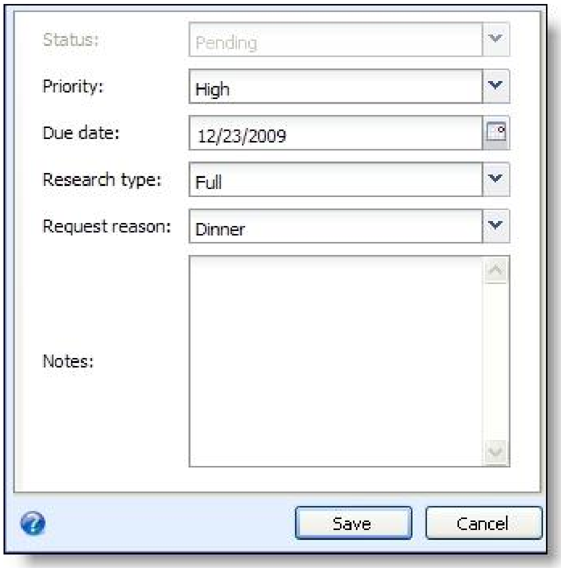
4. Select the **Record type** for which you are requesting information. For example, Individual, Organization, or Research List.
5. Depending on the **Record type** select, you next must select the constituent or Research List for which you want information. For example, if you select the "Research List" **Record type,** the **Research List to include in request** field appears. Search for and select the group. After you select the group, the **Constituents to research** grid populates to include all group members.

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

6. Enter any additional information you want to provide with the request, such as a priority, due date, or reason. For more information about the fields and options included on this screen, see Add a Prospect Research Request Screen on page 119.
7. Click **Save**. The constituents included in the request now display in the **Open research requests** grid.

Edit a specific constituent from an existing prospect research request from the Research Request Management page

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab.
3. Click **Edit.** The edit screen appears.



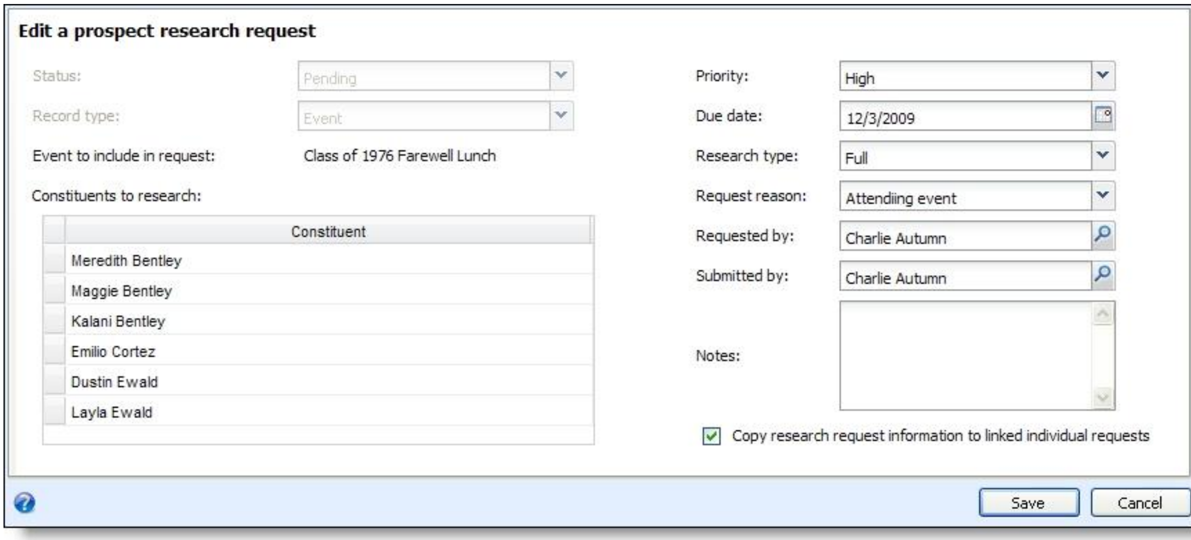
4. The constituent's **Status** cannot be changed. You can change the following options: **Priority, Due date**, **Research type**, **Request reason**, and **Notes**. For information about these options, see Add a Prospect Research Request Screen on page 119
5. Click **Save** to save the changes.

Completed Requests

The Completed Requests tab in Research Request Management tracks all completed requests. This tab displays only completed main requests; it does not display completed individual requests. Once all individuals included in a main request are complete, the request housing these individuals displays on the Completed Requests tab.

Edit an existing prospect research request from the Competed Requests tab of the Research Request Management page

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Completed Requests tab.
3. In the **Completed research requests** grid, select the request you want to edit.
4. Click **Edit**. The Edit a prospect research request screen appears.



5. The constituent's **Status** and **Record type** cannot be changed. You can change the following options: **Priority, Due date**, **Research type**, **Request reason**, **Requested by**, **Submitted by**, and **Notes**. For information about these options, see Add a Prospect Research Request Screen on page 119.
6. Select **Copy research request information to linked individuals requests** if you want the information in the edit form copied to any of the individual requests created off the main request. The information copies if those individual requests are linked and not completed or canceled.
7. Click **Save** to save the changes.

View research request record from the Completed Requests tab of the Research Request Management page

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Completed Requests tab. All completed requests display in the **Completed research requests** grid.
3. Click on the request for which you want to view the research request record. The Research Request page appears.
4. To return to the Research Request Management page, click **Back**.

Establish User Permissions for Prospect Research Request Management

You can manage the application users that have access to information stored on the Prospect Research Request Management page. Application users are the individual users of your system. Access to the research data is based on the permissions established in Prospect Research Request Management Configuration.

Add user permissions for Prospect Research Request Management

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Under **Configuration**, click **Research request**.

3. The Prospect Research Request Management Configuration page appears. All existing application users with permission to the Research Request Management page display in the **Application User Permissions** grid.
4. Click **Add**. The Add an application user permission screen appears.
5. In the **Application user** field, enter the domain and user name for the user you want to add. Click the search icon in this field to access a search screen to help you locate the application user.
6. Select **Can view requests assigned to others** if you want to allow this user to view all requests in Research Request Management. If you do not select this option, the user can see only requests assigned to him.
7. Click **Save** to save your settings and return to the Prospect Research Request Management Configuration page.

Edit user permissions for Prospect Research Request Management

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Under **Configuration**, click **Research request**.
3. The Prospect Research Request Management Configuration page appears. All existing application users with permission to the Research Request Management page display in the **Application User Permissions** grid.
4. Select the user you want to edit.
5. Click **Edit**. The Edit an application user permission screen appears.
6. Select **Can view requests assigned to others** if you want to allow this user to view all requests in Research Request Management. If you do not select this option, the user can see only requests assigned to him.
7. Click **Save** to save your settings and return to the Prospect Research Request Management Configuration page.

Delete user permissions for Prospect Research Request Management

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Under **Configuration**, click **Research request**.
3. The Prospect Research Request Management Configuration page appears. All existing application users with permission to the Research Request Management page display in the **Application User Permissions** grid.
4. Select the user you want to delete.
5. Click **Delete**. A confirmation screen appears.
6. Click **Yes** to delete the selection and return to the Prospect Research Request Management Configuration page.

Track Constituent Research Requests

You can track research request statuses from all application pages related to the constituent that is affected by the request. For example, from the constituent's Wealth and Ratings page, a message box appears near the top of the page announcing a request is open.

Click on the message box to open the notifications screen.

Find External Properties and Businesses and Target Analytics Searches

Find External Properties and Businesses and Target Analytics database search are two separate tools that help you locate new prospects for your organization.

Find External Properties and Businesses

Find External Properties and Businesses allows researchers to identify important data on prospects even when only incomplete information is available. For example, a prospect may own vacation property that for a number of reasons is not showing up during the standard *WealthPoint* search. With **Find External Properties and Businesses**, the researcher can search for the home by entering only a Last name and the state in which he suspects the vacation home exists.

Note: **Find External Properties and Businesses** is available only to clients with ***WealthPoint*** subscriptions.

This search tool takes the submitted information and matches it against the CoreLogic Data Services real estate data source or the D&B business ownership data source. The results display on the Find External Properties and Businesses page.

Field Matching Logic

Find External Properties and Businesses returns records arranged based on confidence levels going from highest confidence to lowest, and it continues to return records until matches no longer exist or it reaches the 100 record return limit.

The search first queries all records that match all fields sent in the search. Then, based on a field ranking system, the search attempts to partially match records by dropping a field from the search that it considers least helpful in getting the best record back. The priority of the fields considered is as follows.

- **For real estate searches**

  1. Address
  2. ZIP

3. City
4. State
5. Last Name
6. First Name/Nickname
7. Company Name
   - If information is entered in this field, and a Last Name and/or First Name/Nickname is also entered the application uses the company name in only the Business Ownership search.
   - If information is entered in this field, and no Last Name or First Name/Nickname is entered, the Company Name is also used to search against the Last name field in the Real Estate portion of the search.
8. Unit (used in real estate searches only)

For business ownership searches

1. Last Name
2. First Name/Nickname
3. Company Name
   - If information is entered in this field, and a Last Name and/or First Name/Nickname is also entered the application uses the company name in only the Business Ownership search.
   - If information is entered in this field, and no Last Name or First Name/Nickname is entered, the Company Name is also used to search against the Last name field in the Real Estate portion of the search.
4. State
5. City
6. ZIP
7. Address
8. Phone number (used in business ownership searches only)
   - **Three characters or less**: the number is assumed to be an area code, and the system attempts to match against area code. For one or two characters, a * wildcard is assumed.
   - **Four to seven characters**: the number is assumed to be the main phone number (not the area code). For between four and six characters, a * wildcard is assumed.
   - **Greater than seven characters**: first three numbers are assumed to be the area code, with the remaining numbers used to match against the main phone number. For example if you enter nine numbers, the first three are broken out as the area code and the next six are used to create the rest of the phone number with a wildcard in the seventh slot (123456789 = (123) 456-789*).
   - **If numbers are entered within parenthesis ( )**: the system assumes these numbers are the area code. So with a (123)456 entry, even though it contains six numbers, the system identifies 123 as the area code and 456 as the first three digits of the main phone number.
   - **Area code and next three numbers or area code and last four numbers**: Wild card characters can be used in place of the unknown numbers. For example, if you know the area code and the next three numbers, but you do not know the remaining four numbers, you can enter “843765****” in

your search. If you know the area code and the last four numbers, but you do not know the three middle numbers, you can enter “843***1000” in your search.

Match Codes

When you add a real estate or business asset record through **Find External Properties and Businesses,** the new addition is identified on the Wealth and Ratings page in the **Match code** column. The **Confidence rating**[1] defaults to level 5, but it can be changed through **Edit confidence settings**.

Execute a "Find External Properties and Businesses" Search

None of the fields included on the Find External Properties and Businesses page are required, however, the fewer number of fields completed, the longer the results list may be. The results display the first 100 records matched.

Tip: In order to return search results as quickly as possible, we limit the number of records displayed to the first 100 - the order is based on the confidence rating, going from the highest to the lowest. If your search turns up more than 100 returns, change your search criteria to better filter the results. For example, if you entered just the Last name and state information for your first search, consider adding a first name or a city and rerunning the search.

Search for prospect wealth information using the quick search option

1. From the Prospects page, click **Find External Properties and Businesses**. The Find External Properties and Businesses page appears.
2. The quick search allows you to enter any combination of fields. For information about how the matching logic works, see Field Matching Logic on page 139.

   None of the fields is required; however, the more information provided the better the results.
3. In the **Real estate address to search** section, you can select to search **All addresses** satisfying your criteria or **Selected addresses**. If you select **Selected addresses**, select the addresses you want included in the search.
4. In the **Data source(s) to search** section, you can select to search **All data sources** or **Selected data sources**. If you select **Selected data sources**, select the data sources you want included in the search. For example, if you want just real estate information returned, select the **Real estate** option under **Selected data sources**.

   Tip: By default, **Find External Properties and Businesses** matches search fields exactly. For example, if you enter “Jo” in the **First name** field, the search looks for first names spelled “Jo.” It does not consider Joe, or Joseph, or John as would the search functionality in other areas of the application. You can, however, use the * wildcard character when you are unsure of exact spelling. For example, you can enter “Jo*” or “Joh*” in the **First name** field and expect the search to include Joe/Joseph or John. In the address fields, use the * to designate a “like” statement. For example, 211* returns 211 San Remo Circle, 2110 San Remo Circle, 211 Main Street, 2110 First Street, and so on. 21*1* returns 211 Park Ave., 21541 Second Street, 2101 Water Street, and so on. Be aware, searching with wildcards may result in longer processing time.

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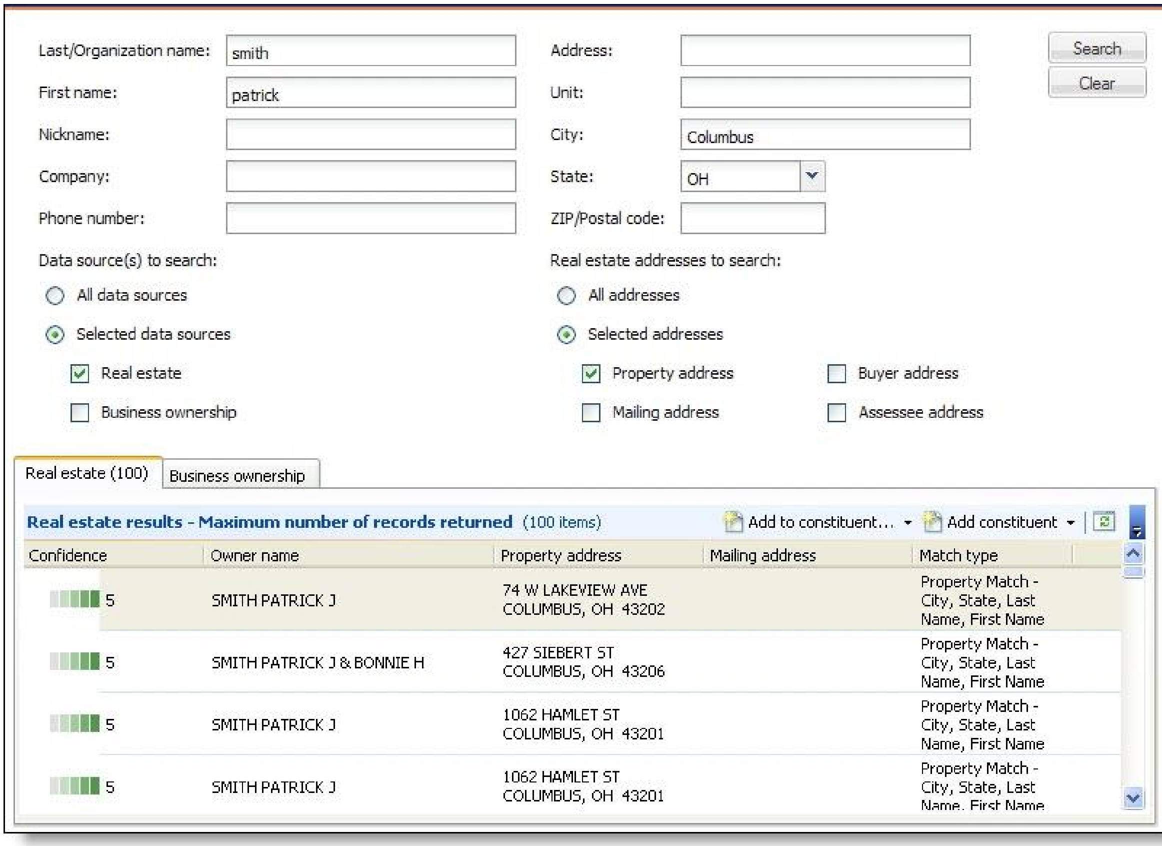
[1]Indicates the relative strength of the match. For example, if confidence in the wealth information provided is very high, the rating number is “4”; if confidence in the wealth information provided is low, the rating number is “1”.

5. Click **Search**.



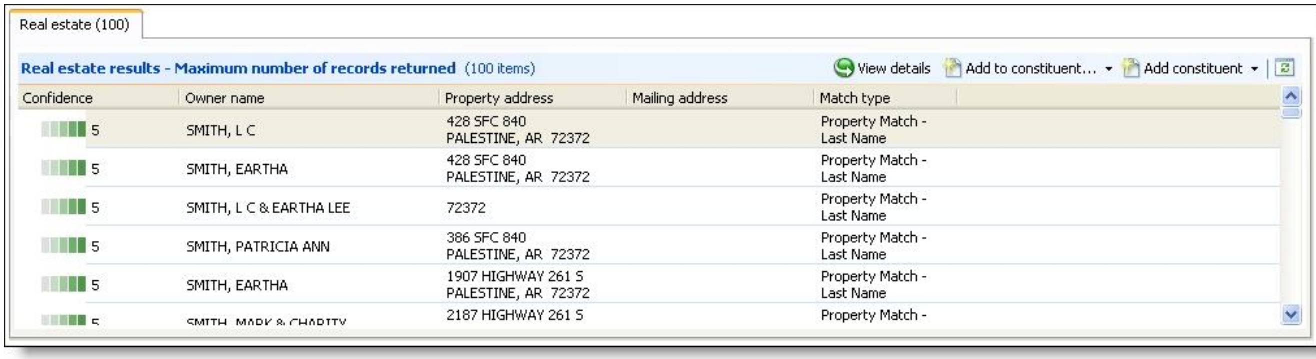
The result records are displayed in order of the confidence rating, with the higher rated records displaying first. In addition, results are arranged based on the data source from which the information was gathered. For example, CoreLogic results display on the Real estate tab and D&B results display on the Business ownership tab.

For more information, see:

- Real Estate Tab on page 142
- Business Ownership Tab on page 144

Real Estate Tab

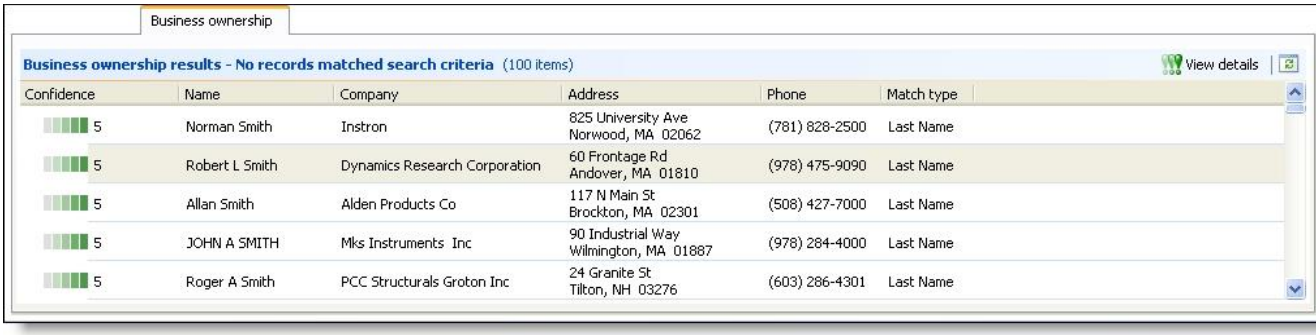
After you execute a Find External Properties and Businesses search, the search results are arranged in tabs, displaying data related to a specific data source. This section details the Real estate tab.



- To view additional information, select the record in the grid for which you want to view details and click **View details**. The search details page appears. For more information about this page, see Search Details Page - Real Estate on page 144.
- If you want to add the selected results to an existing constituent record in your database, click **Add to constituent**. The button is available on both the search details page and the Real estate tab on the Find External Properties and Businesses page.
  - From the drop-down menu on the Add to constituent button, select what you want added to the constituent:
    - **Real Estate Record** creates a real estate record in the selected constituent record. All data located in the search is included in the new real estate record.
    - **Property Address** adds the information included in the **Property address** column of the Real estate tab to the prospect's constituent record.
    - **Mailing Address** adds the information included in the **Mailing address** column of the Real estate tab to the prospect's constituent record.
  - An Add screen for the selected option appears. From here, click the **Search** icon to search for and select the constituent to which you want to add this information.
  - After you select the constituent, you return to the Add screen. The selected constituent's name now displays in the **Constituent** field.
  - Click **Save**.
    - If you selected **Real estate record**, the system runs a duplicate check before adding the information to the record. If no duplicates are located, the information is added, and you return to the Find External Properties and Businesses page. If a duplicate is located, the Duplicate Search screen appears. From here, click **Select** to update the existing record with the new information; click **Ignore** to add the new information even as a potential duplicate; click **Cancel** to not add the information.
    - If you select **Property address** or **Mailing address** the Add an address screen appears. For information about the items included on this screen, see the *Prospects Guide*.
- If you want to add the selected result as a constituent record in your database, click **Add constituent**. Then select if you want the result added **From owner/property address** or the **From owner/mailing address**. The Select constituent names to add screen appears. For information about this screen, see Add a new constituent to your database from the search details page on page 145. Start at step 2.

Business Ownership Tab

After you execute a search, the search results are arranged in tabs, displaying data related to a specific data source. This section details the Business ownership tab.


Business ownership

Business ownership results - No records matched search criteria (100 items)

View details

Confidence	Name	Company	Address	Phone	Match type
5	Norman Smith	Instron	825 University Ave Norwood, MA 02062	(781) 828-2500	Last Name
5	Robert L Smith	Dynamics Research Corporation	60 Frontage Rd Andover, MA 01810	(978) 475-9090	Last Name
5	Allan Smith	Alden Products Co	117 N Main St Brockton, MA 02301	(508) 427-7000	Last Name
5	JOHN A SMITH	Mks Instruments Inc	90 Industrial Way Wilmington, MA 01887	(978) 284-4000	Last Name
5	Roger A Smith	PCC Structurals Groton Inc	24 Granite St Tilton, NH 03276	(603) 286-4301	Last Name

- To view additional information, select the record in the grid for which you want to view details and click **View details**. The details page appears. For more information about this page, see Search Details Page - Business Ownership on page 147.
- If you want to add the selected results to an existing constituent record in your database, click **Add to constituent** and select either **Business ownership record** or **Company address**.
  - An Add screen appears. From here, click the **Search** icon to search for and select the constituent to which you want to add this information.
  - Click **Save**.
    - If you selected **Business ownership record**, the system adds the business ownership record to the selected constituent. To view the added record, open the selected constituent, and from the Wealth and Ratings page, in the **Wealth summary** section, click **Business ownership**. The constituent's business ownership page appears with the new record.
    - If you selected **Company address** the Add an address screen appears. The selected address information defaults. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects Guide*. When you are done entering information to this screen, click **Save** to add the record to your database.

Search Details Page - Real Estate

The search details page generated for CoreLogic Data Services searches displays all real estate information located for the selected prospect. It allows you to review the information before you decide to take additional action.

Add Information to Constituent from External Property and Businesses Details page

From the details page, after you review the returned data, you can choose to add the information to an existing constituent in your database.

Add information to an existing constituent from the search details page

1. From the search details page, click **Add to constituent** and then select the information you want added to the constituent record: **Real estate record**, **Property address**, **Mailing address**, **Assessee address**, or **Buyer address**. Regardless of your selection, the Select constituent screen appears.
2. Click the search icon to access the Individual Search screen. From here you can locate and select the record in your database to which you want to add the information.
3. From the Select Constituent screen, click **Save**.
   - If you select **Real estate record**, the system runs a duplicate check before adding the information to the record. If no duplicates are located, the information is added and you return to the Find External Properties and Businesses page.

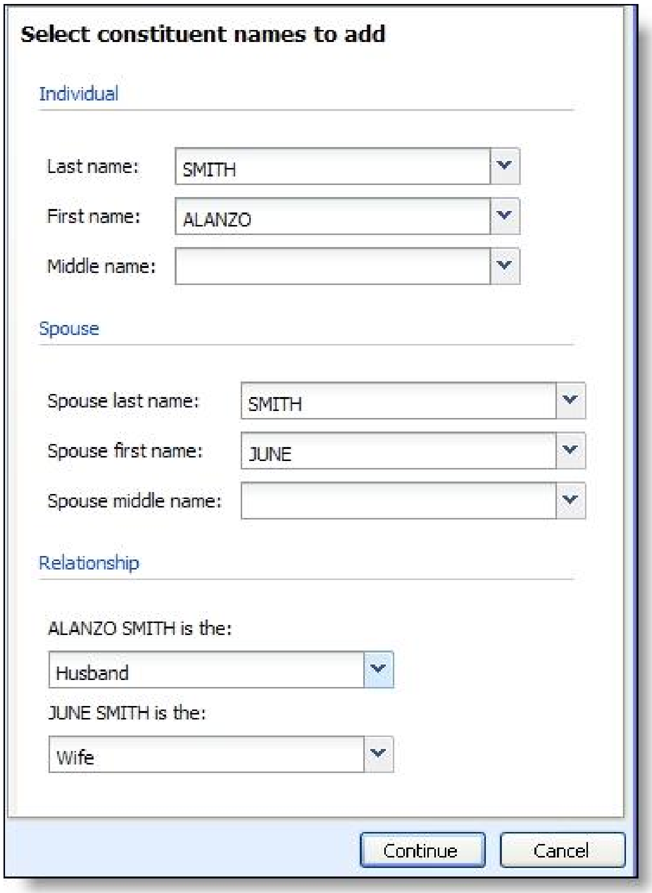
     If a duplicate is located, the Duplicate Search screen appears. From here, click **Select** to update the existing record with the new information; click **Ignore** to add the new information even as a potential duplicate; click **Cancel** to not add the information.
   - If you select **Property address**, **Mailing address**, **Assessee address**, or **Buyer address** the Add an address screen appears. The selected address information defaults to the proper fields. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.

Add Constituent from Search Details Page

From the search details page, after you review the returned data, you can add a new constituent to your database. You can also choose how you want the information added: owner information with the property address, owner information with the mailing address, assessee information with the assessee address, or buyer information with the buyer address.

Add a new constituent to your database from the search details page

1. From the search details page, click **Add constituent** and then select the property summary data on which you want to base the new constituent record: owner information with the property address, owner information with the mailing address, assessee information with the assessee address, or buyer information with the buyer address. Regardless of your selection, the Select constituent names to add screen appears.



2. Select the **Last name**, **First name**, and if necessary **Middle name** you want to use in the constituent record. Your options default to the names included in the property summary. For example, if you select the assessee information with the assessee address and in the property summary two assessees are listed, both assessees' names appear as name options for the new constituent record. Select the name you want to use.
3. You can also select **Spouse** and **Relationship** information you want used in the record.
4. Click **Continue**. The Add an individual screen appears.
5. Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.

   Note: The real estate asset is automatically added to the prospect record. If a spouse is included in the quick search results, the asset is not included on the spouse record. After the asset is added, the wealth capacity formulas are updated.

6. Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the property summary, click **Back** to return to the search details page.

Search Details Page - Business Ownership

The search Details page generated for D&B searches displays all business ownership information located for the selected prospect. It allows you to review the information before you decide to take additional action. The data is arranged in a summary section and on three tabs: Matching executives, Biography information, and Ownership information.

Business Ownership Summary Section

The **Business ownership summary** section displays at the top of the page and includes general information about the business, such as:

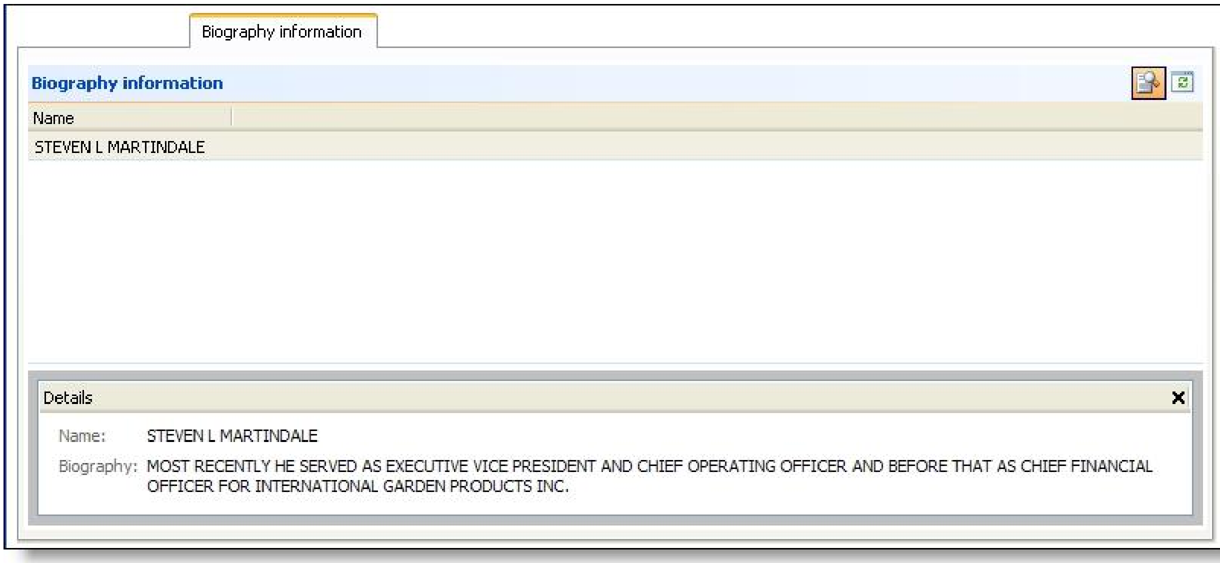
- Company name
- Trade name
- Short description
- Phone number
- Company address
- Mailing address
- DUNS number
- SIC code
- Year the business started
- Number of employees
- How the company is held
- Sales revenue
- Ratio
- Valuation

Business ownership summary

Company:	Instron	DUNS:	1007855
Trade name:	Instron Satec	SIC code:	3829
Description:	Meas Ctlng Dvcs N	Year started:	2005
Phone:	(781) 828-2500	# of employees:	1329
Company address:	825 University Ave Norwood, MA 02062	Held:	Public
		Sales:	$116,800,000.00
Mailing address:		Ratio:	0.00
		Valuation:	$0.00

Biography Information Tab

This tab lists the names associated with the company for whom we located biographical information. To view details, select a name in the **Biography information** grid. The Details window appears at the bottom of the tab.



Once you review the information on this tab, you have the following options:

- Create a new constituent record with the selected information by clicking **Add constituent**. The Select options to add constituent screen appears.
  1. The **Name** defaults to the name associated with the selected record, and it cannot be edited.
  2. In the **Address to use** field, select the address type on the individual constituent record to which you want to assign the address associated with the selected business ownership record.
  3. In the **Organization** section, select how you want to handle the business organization information included in the selected business ownership record. You can **Add a new organization** record to your database or **Search existing organizations** to which to add the business ownership data.
  4. In the **Relationship** section, identify what the individual's relationship is to the organization included in the business ownership record. For example, "Owner."
  5. Click **Continue**. The Add an individual screen appears.
  6. Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.
  7. Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search details page.
- Add selected information to an existing constituent in your database by clicking **Add to constituent** and selecting **Company address** or **Mailing address**. The Select constituent screen appears.
  - Locate and select the constituent to which you want to add the selected information. The Add an address screen appears.
  - Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.

- Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search details page.

Ownership Information Tab

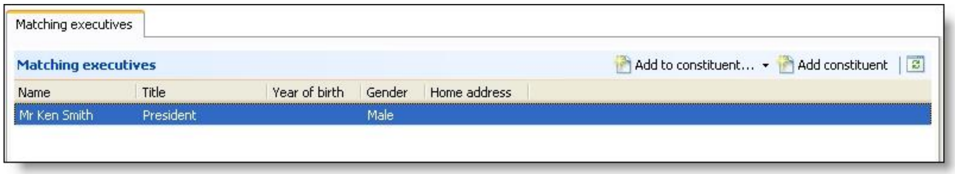
This tab displays each owner name associated with the company along with their ownership percentage and default ownership value.

Once you review the information on this tab, you have the following options:

- Create a new constituent record with the selected information by clicking **Add constituent**. The Select options to add constituent screen appears.
    1. Select the **Last name**, **First name**, and if necessary **Middle name** you want to use in the constituent record. Your options default to the names included in the business ownership summary.
    2. In the **Address to use** field, select the address type on the individual constituent record to which you want to assign the address associated with the selected business ownership record.
    3. In the **Organization** section, select how you want to handle the business organization information included in the selected business ownership record. You can **Add a new organization** record to your database or **Search existing organizations** to which to add the business ownership data.
    4. In the **Relationship** section, identify what the individual's relationship is to the organization included in the business ownership record. For example, "Owner."
    5. Click **Continue**. The Add an individual screen appears.
    6. Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.
    7. Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search Details page.
- Add selected information to an existing constituent in your database by clicking **Add to constituent** and selecting **Company address** or **Mailing address**. The Select constituent screen appears.
    - Locate and select the constituent to which you want to add the selected information. The Add an address screen appears.
    - Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.
    - Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search Details page.

Matching Executives Tab

This tab displays the executive names matched on the selected search. In most cases, only one name displays.



Once you review the information on this tab, you have the following options:

- Create a new constituent record with the selected information by clicking **Add constituent**. The Select options to add constituent screen appears.
  - The **Name** defaults to the name associated with the selected record, and it cannot be edited.
  - In the **Address to use** field, select the address type on the individual constituent record to which you want to assign the address associated with the selected business ownership record.
  - In the **Organization** section, select how you want to handle the business organization information included in the selected business ownership record. You can **Add a new organization** record to your database or **Search existing organizations** to which to add the business ownership data.
  - In the **Relationship** section, identify what the individual's relationship is to the organization included in the business ownership record. For example, "Owner."
  - Click **Continue**. The Add an individual screen appears.
  - Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.
  - Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search details page.
- Add selected information to an existing constituent in your database by clicking **Add to constituent** and selecting **Business ownership record**, **Company address**, **Mailing address**, or **Home address**. The Select constituent screen appears.
  - Locate and select the constituent to which you want to add the selected information. The Add an address screen appears.
  - Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.
  - Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the business ownership summary, click **Back** to return to the search details page.

Target Analytics Prospect Database Search

Note: The Target Analytics Database is not available for the following subscription levels: Starter, Crystal, and Bronze. Full access to the database is granted to Gold, Silver, Essentials, and Professional subscription levels.

This search functionality helps you locate new prospects or find additional information on existing prospects, complementing the **Find External Properties and Businesses** functionality.

This database is a pre-matched data store that runs offline, allowing the search process to run quickly. It pre-matches by household, locating real estate and business information.

Recommend Prospecting Search Workflow

- If you integrate with ***The Raiser's Edge***, run a "Search all saved prospects" search to confirm the prospect does not exist (if you do not integrate with ***The Raiser's Edge***, run a "ResearchPoint only" search).
- If the prospect is not found click **Click here to search the Target Analytics Prospecting Database**. A search of the Target Analytics database is executed using the existing search criteria.
- When the new prospect is located, click **Screen now**. The Add new individual screen displays. The fields included on this screen are consistent with Blackbaud's recommended best practices regarding prospect data. We recommend you complete as many fields as possible.
- At the bottom of the screen, make sure **Screen record on save** is selected.
- When you click **Save**, the application runs a wealth screen on the prospect and all information is added to ***ResearchPoint***.

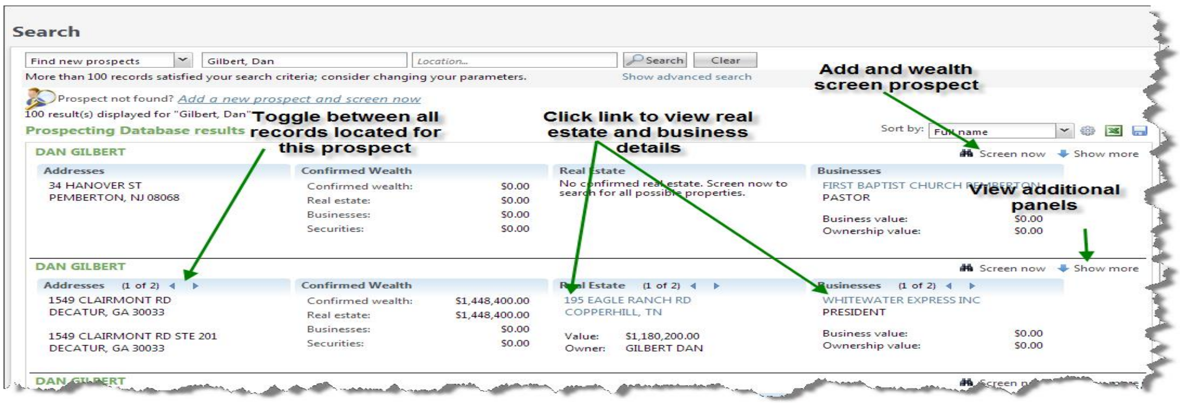
Target Analytics Results Grid

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.

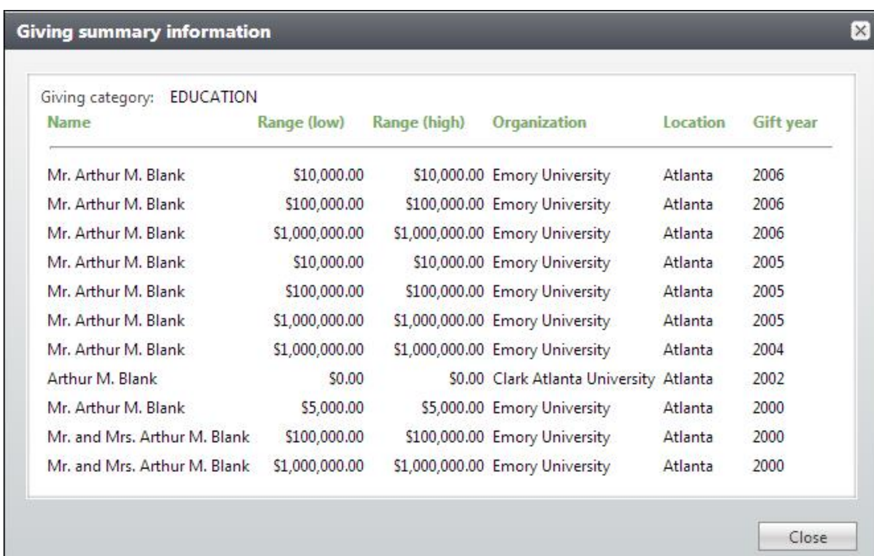
   Note: For instructions on how to customize the display tiles, see Customize search result tiles.

   - 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.



Giving summary information

Giving category: 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

Close

   - 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.

Export Target Analytic search results

1. After running a Target Analytics search, click the export icon located at the top of the results grid.

2. A screen displays allowing you to view the results in an outside application, such as Microsoft *Excel* or save the file to a location on your computer.

Glossary

A

Attribute Categories

From Administration, you create the attribute categories available to users in the program. Users can assign any necessary values to these categories. For example, if a constituent is a gourmet cook and a cyclist, a user can enter each activity in the constituent's record with an attribute category of Hobbies. This helps keep attributes neatly organized and helps with reports and queries. To enable users to enter attributes when they add or edit information throughout the program, you can use form extensions. With form extensions, you can add a tab or section for users to enter attribute information on applicable forms and pages that otherwise do not include fields for attributes.

Attribute Categories

Attributes

Provide flexibility to your record keeping. You can define and store special information about a wide variety of record types. You can identify a category for the attribute and then store an entry specific to that category.

C

Confidence 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”.

constituencies

A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituencies.

Constituent group types

Before you add a constituent group record to the database, you must define the types of constituent groups used at your organization, such as giving circles and family foundations. To view or manage your constituent group types from Constituents, click Constituent group types under Configuration. The Constituent Group Types page appears.

CoreLogic data source

Tracks the constituent’s real estate holdings. This information is stored on the Real estate page accessed from the constituent Wealth and Ratings page.

D

donations

A donation is.......

DonorBank data source

Gathers information on charitable donations from thousands of nonprofit organizations covering all 50 states. Donor name, type of gift, contribution date, and gift size are included in these detailed reports.This information is stored on the Philanthropic gifts page accessed from the constituent Wealth and Ratings page.

Dunn & Bradstreet data source

Provides you with data about the constituent’s employer, position, career history, and compensation. This information is stored on the constituent’s Business ownership page accessed from the constituent Wealth and Ratings page.

E

Edit research details

If you discover you must change the prospect manager assigned to a prospect or change the prospect’s status, you can using the Edit research details link. The Edit research details screen appears, and you can make these necessary changes.

Enable Data Refresh

If you choose to allow automatic WealthPoint Data Refreshes - by clicking the Enable Data Refresh option displayed on the explorer bar of the Wealth And Ratings Data page - any data refreshes added to the system are displayed on the Wealth And Ratings Data page.

F

Federal Elections Commission data source

This 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. This information is stored on the Political donations page accessed from the constituent Wealth and Ratings page.

G

Giving summary

This link appears in the More information pane of the Wealth and Ratings page. This link takes you to the constituent’s Giving Summary page. From this page, you can view total giving, largest gift, first gift, and latest gift information; and add, edit, and delete giving information. The page also tracks the constituent’s total number of gifts.

Group member wealth capacity

This grid included on the group Wealth and Ratings page, displays aggregated wealth information for the individual constituents included in the group or household. If the same wealth detail record exists for two or more constituents in the group, it is counted only once. For example if a husband and wife in a household each include their home under real estate, the value of the home is included in the group wealth summary only one time.

GuideStar data source

GuideStar scans the names of 220,000 nonprofit board members and executives from 275,000 organizations and extracts information such as nonprofit organation name, affiliation, and address of the donor. This information is stored on the Nonprofit affiliations page accessed from the constituent Wealth and Ratings page. In addition, GuideStar provides foundation name and address and total assets (fair market value) along with the constituent's title and compensation. This information is stored on the Private foundations page accessed from the constituent Wealth and Ratings page.

L

Larkspur data source

Larkspur compiles wealth indicators from over 70 different data sources and isolates 3.4 million high net-worth individuals nationwide. This information is stored on the Affluence indicators page accessed from the constituent Wealth and Ratings page.

Link Tank

This window, nested in the right side of the Wealth and Ratings page, provides links to popular online data resources. These resources are popular tools for prospect researchers. Housing the links within the application gives researchers quick access to sites like MarketWatch, Guidestar, and InvestorWords. The links open the web page in a separate window, allowing you to easily toggle between the application and the website.

M

Manage WealthPoint Batch Screening Process

Allows you to create a business process to screen multiple research groups through WealthPoint. You can link multiple groups to one process, and the process automatically submits the groups to WealthPoint and retrieves the results. The process submits up to five groups at a time. It checks the status of all groups sent to WealthPoint, and when results are retrieved for one group, it sends another, so that five groups are running at all times. This cycle continues until all groups are screened.

MarketGuide data source

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. This information is stored on the Income/Compensation page accessed from the constituent Wealth and Ratings page.

Modeling and Propensity Update Batch

This feature updates constituent modeling and propensity data based on information included in the import file or batch. When using import, the process compares a record ID included in the import file to system lookup IDs and alternate lookup IDs. During the import process, if the application finds a match in the database, the information in the matched record is updated.

N

NOZA data source

Gathers information on charitable donations from thousands of nonprofit organations covering all 50 states. Donor name, type of gift, contribution date, and gift size are included in these detailed reports.This information is stored on the Philanthropic gifts page accessed from the constituent Wealth and Ratings page.

P

Prospect Analysis

Tools that help Prospect Researchers and 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.

Prospect Quick Search

Allows researchers to identify important data on prospects even when only incomplete information is available. For example, a prospect may own vacation property that is not showing up during the standard WealthPoint search. Quick Search can search for the home based only on last name and the state in which he suspects the vacation home exists. Prospect Quick Search is available only to clients with WealthPoint subscriptions. The quick search tool takes the submitted information and matches it against the Fidelity Data Services real estate data source or the D&B business ownership data source. The results display on the Prospect Quick Search page.

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.

Prospect Research Report templates

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.

Prospect research request

These tools allow you to submit a prospect research request; designate the search for a specific record type (constituent, organization, research group); enter request information such as priority, type of research, reason for request, and much more; and track the results. When you create a request, several request records are created: one for the overall request and additional request records for each individual included in the request. For example, if you create a "Constituent" request and add three individuals to the Prospects to research grid on the add screen, a record is created for the general constituent request and three additional records are created for each individual you listed in the grid. Research officers can then address each individual record when they complete work on the constituent research request.

R

Reason Codes

With reason codes, your organization can standardize the reasons users change information and restrict the use of records, such as when they mark a constituent as inactive. When users make the change, they can select this code to consistently explain the reason for the change.

Research Group Report

Allows prospect researchers to prepare and print reports that include all members of a selected research group. To generate the report, open the research group for which you want to generate the research group report. Under Reports, click Research group report. 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: primary business, birth, gender, and spouse information along with an notes associated with the prospect record.

Research groups

Help you more effectively research potential prospect. Research groups are static groups of constituents. 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.

T

Thomson Financial data source

Provids SEC stock information and 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. The Securities page is accessed from the constituent Wealth and Ratings page.

W

Wealth capacity

This grid displays general information about the prospect’s wealth capacity including the formula used to determine the capacity. You create formulas in the Wealth capacity formula management function, accessed from the Administration pane on the Prospects page.

wealth indicators

Other indicators located that tell you something about this constituent's wealth. For example, a membership in a millionaire club or tax assessor data.

Wealth information

Data used to track your constituent’s estimated wealth. Knowing the types and amount of wealth your constituents possess, allows you to better determine cultivation strategies and determine the constituent’s giving potential.

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. This data is accessed from the Biographical page on the constituent's Wealth details page.