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Target Analytics®

Development Officer - View Only

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Contents

Development Officer

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

My Fundraiser Page

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

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

Search for a Prospect

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

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

    > **Tip:** Including both last name and ZIP code information improves search speeds when searching the Target Analytics database.

4. In the **Location** field, enter any location information you have for the prospect: city, state, street address.
5. Click **Show advanced search** to access additional search criteria such as nickname and age range.
6. Click **Search**. The results grid displays any records located that satisfy your search criteria.

Wealth and Ratings Management

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

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

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

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

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

- Affiliations tab: Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.
- Assets tab: Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.
- Biographical Information tab: Houses personal information, such as name, marital status, and gender; along with contact information, relationships, interests, and education.
- Giving tab: Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.
- Model Scores tab: Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which prospect will become a major donor.
- Wealth Summary tab: Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.

Access the Prospect's Wealth and Ratings Record

We recommend you open a prospect's wealth and ratings record from the Home page with the one-stop prospect search.

1. From the Home page or from the *Prospects* page, under**Prospect research**, click **Search**. The Search page appears.
2. Select "Search saved prospects."
3. Enter the prospect's name or lookup ID and if known, the location.
4. Click **Search**. All available records in *ResearchPoint* that match your search criteria appear.

5. To open the record, click anywhere in the prospect's row or click **View RP**.

6. The prospect's Wealth and Ratings record appears.

Tip: You can also open the prospect's wealth and ratings record from your research lists.

The prospect search is also recommended for when you need to add new prospects to your database. Even if the prospect is known to you, adding through the Home page search, enables you to quickly see if the prospect is in your database before searching the Target Analytics Prospecting Database. To learn more, see the *One-Stop Prospect Search and Add Guide*.

Display Tips for Members List

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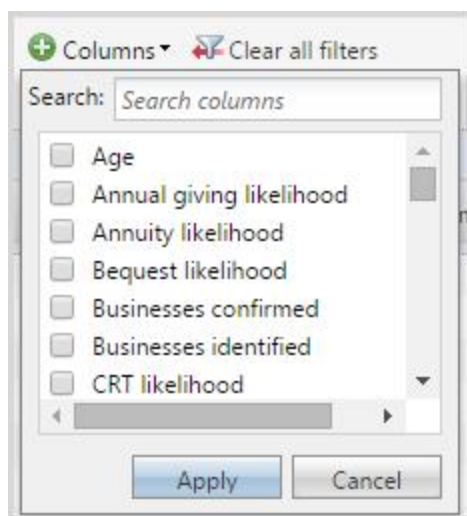
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side ⟷ . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.

- To allow even more space to view your column settings, you can also collapse the explorer bar

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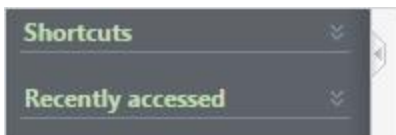
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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

Use Search

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

Members List Links

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

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

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

Confidence Ratings

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

✔ [check] icon = The information contained in the record is confirmed as correct.

⭐ [star] icon = **_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 reject a record when you know for certain that the data does not belong to your constituent.
	You designate a record "Rejected" by selecting the record and clicking the **Reject** button. When you reject a wealth information record, the **Confidence** number changes to "0" and a red icon appears to the left of the selected entry.

View Wealth Summary Information

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

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

You can also review the giving capacity and research details for a prospect. If needed, you can edit the research details to update the research status, re-assign the prospect manager, or add a summary of your research.

In this section:

View Giving Capacity Information

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

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

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

Prospect Status, Manager, Group Association, and Summary Information

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

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

❯ 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 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 screen appears.
3. In the **Research status** field, enter the prospect's new status.
4. Click **Save** to save the change.

❯ 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 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.

Model Scores and Ratings

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

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

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

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

Prospect Asset Information

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

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

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

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

Also in the summary section on this page:

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

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

In this section:

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 Display Tips for Members List on page 4.

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 Dun & 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 Display Tips for Members List on page 4.

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 Reuters imported from **WealthPoint**.

The SEC Stock Information by Thomson Reuters 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 .

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 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.
4. Click **Save** to save the entry and return to the transactions page.

Wealth Indicators

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

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

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

For information about managing your columns and filtering and searching content in the grid, see .

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 Thomson Reuters imported from **WealthPoint**.

Thomson 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 Display Tips for Members List on page 4.

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 Display Tips for Members List on page 4.

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 giving 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.

In this section:

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. If the information is incorrect, click **Clear** to remove the information.

> **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:
   - Total giving amount: 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 number: 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.
   - And information about the Largest, First, and Latest gifts: 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
4. To save your entry and return to the Giving tab, click **Save**.

Philanthropic Gift Information

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

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

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

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 4.

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 .

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. 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.

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.

In this section:

Nonprofit Affiliations Information

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

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

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

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

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 4.

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 Display Tips for Members List on page 4.

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 Display Tips for Members List on page 4.

Constituencies

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

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

Biographical Information

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

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

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

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

❯ View prospect biographical information imported from Marquis Who's Who or Experian

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. The **Source** column displays from which data source the information was gathered.
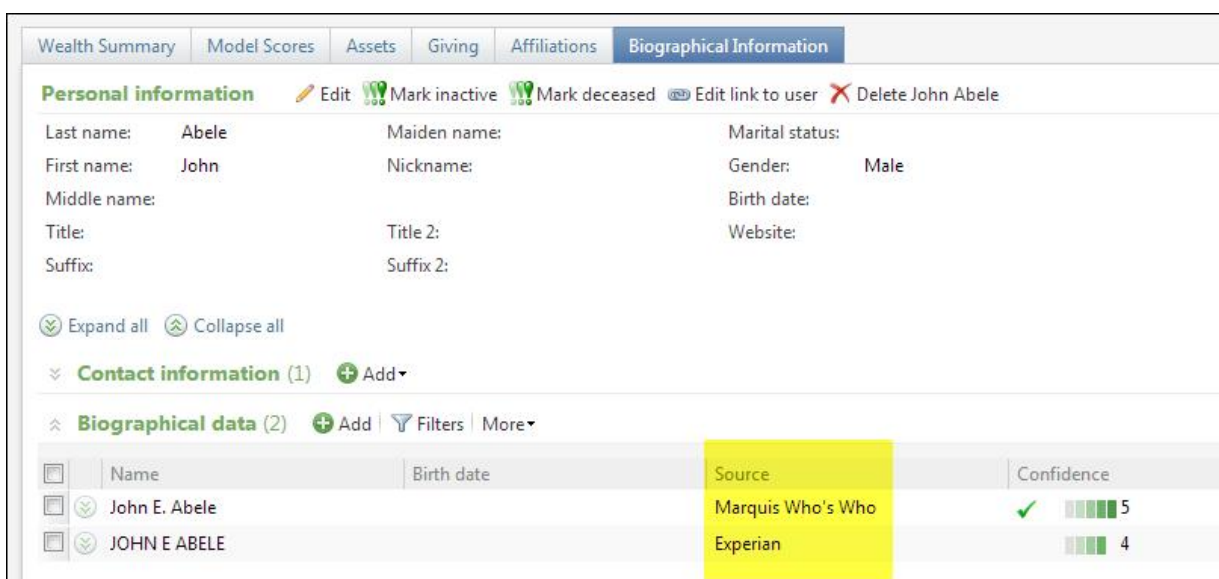
4. Expand any record to view record details. From the expanded view, you can also confirm, reject, edit, or delete the data.

> **Tip:** Experian data is compiled from a combination of over 300 public and proprietary sources. The sources are compiled to produce final biographical details for each unique individual. Additional values are composed by modeling marketing database elements.

Prospect Research Report

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

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

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

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

Export a prospect research report to an outside application

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

Prospect Research Request Management

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

Add New Prospect Research Requests

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

> **Add a New Prospect Research Request**

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 Fields

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.

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
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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**.

The **Research requests** grid at the top of the tab summarizes each request, displaying date, status, record type, number of constituents, type of research requested, and researcher information. The detail

view near the bottom half of the tab displays all information included on the request form, such as priority and submitted by.

Edit an Existing Research Request

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

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

Note: Existing notes on individuals will not be overwritten.

Cancel an Existing Research Request

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

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

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

View Research Requests

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

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

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

Track Prospect Request Status

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

Export Research Requests

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

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

Prospect Analysis

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

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

Access Prospect Analysis

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

❯ View a prospect analysis dashboard

1. From the Prospects page, click **Prospect analysis** under **Research tools**. The Prospect analysis page appears displaying any existing prospect analysis definitions.

2. From the Prospect Analysis page, in the **Prospect analysis dashboards** grid, select the dashboard you want to view.

❯ Export a selected prospect analysis dashboard to another format

1. From the dashboard, at the top of the page, click the **Export** icon to access a drop-down menu.

2. Select your export format: CSV or XLSX.

View Segment Page

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

❯ Access Segmentation Page

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

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

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

Save Segment Prospects to Research List

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

1. From the segmentation dashboard, open the segment page.
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.
4. 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.
5. Click **Save**.

Save Segment Prospects to Selection

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

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

Access Segmentation Page

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

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

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

> **Open a prospect's constituent record from the Segment page**

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

2. In the **Segment prospects** grid, in the **Name** column, select the prospect you want to open.

Target Analytics Model Scores and Ratings Results

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

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

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

Prospect Research Report Templates

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

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

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

Add a prospect research report template

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

Copy a prospect research report template

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

Set a prospect research report default template

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

Add a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.

2. Click **Add**.The Add prospect research report template screen appears.

3. Enter a name and description for your template.

4. From the **Available sections** pane select, and using the arrow keys, move the selections you want to include in your report to the **Selected sections** pane.

5. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report**.

Edit a Prospect Research Report Template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.

2. Select the template you want to change.

3. Click **Edit**.The Edit prospect research report template screen appears.

4. Make any necessary changes.

5. Click **Save** to save the template and return to Prospect Research Report Templates page.

Copy a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.

2. In the **Report templates** grid, select the template you want to copy.

3. Click **Copy**.The Copy prospect research report template screen appears.

4. Change the template name and description.

5. Make any other necessary changes.

6. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report.**

Delete a Prospect Research Report Template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.

2. In the **Report templates** grid, select the template you want to delete.

   Warning: You cannot delete system templates.

3. Click **Delete**. A confirmation screen appears.

4. Click **Yes** to delete the selected template.

5. You return to Prospect Research Report Templates page. The deleted template no longer displays in the **Report templates** grid. In addition, you can no longer select this template when creating a **Prospect Research Report.**

❯ Set a prospect research report default template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.

2. In the **Report templates** grid, select the template you want to use as your default.

3. Click **Set my default template**. Your selected template now displays a green checkmark in the **My default template** column of the **Report templates** grid.

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