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CHAPTER 1

Overview

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Brief Summary of Changes

The optional *RE:Search* module enables you to manage all types of information about your prospects. You can store gifts made to other organizations and financial information such as sources of wealth, annual income, and real estate holdings. You have the ability to track proposals including the amount solicited, the amount funded, ratings from research firms, and extensive notes about your prospect. You can also produce detailed profiles about your prospects.

RE:Search is also an electronic interface between ***The Raiser's Edge for Windows*** and prospect research agencies; the agencies supported are Econometrics, Marts & Lundy, The Whelan Group, Bentz Whaley Flessner, CDA/Investnet, and POW&R With this electronic interface, you can create an electronic data file to be sent, either by diskette or modem, to the prospect research company in the format they require or prefer. The agency will return an electronic data file to you of the researched prospect information. *RE:Search* will import the information and ratings into your ***Raiser's Edge*** database to be viewed from the Prospect tab in *Constituent Management*.

The *RE:Search* module adds a Prospect tab to the constituent record within *Constituent Management*. Here, you can record specific prospect information such as financial data, gifts to other organizations, proposals, and ratings. Specialized prospect research companies can perform detailed analyses on constituents you supply to augment that prospect information. Once the research is performed, hard copy and electronic reports and ratings can be returned to you. The *RE:Search* electronic interface gets this information into ***The Raiser's Edge*** where it can be searched, sorted, and selected. In addition, changes have been made to *Configuration, Profiles, Query, Export, and Batch*.

Electronic Interface

The actual *RE:Search* module is a facility that allows you to gather and format constituent/prospect information to send to an outside agency for analysis. Information returned from such agencies can then be directly transferred to ***The Raiser's Edge***.

The functions you can perform with *RE:Search* are:

- Create the data file to send to a prospect research company.
- Report on the information returned from the prospect research company.
- Import data returned from the prospect research company.

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CHAPTER 2

Changes in The Raiser’s Edge

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Configuration

Security Tab

The Security tab in *Configuration* has an additional option when *RE:Search* is installed with ***The Raiser's Edge for Windows***. Security for a user or a group of users can be set to include or exclude access to the *RE:Search* module. If access to the *RE:Search* module is denied, the user or group of users will still be able to view all other prospect information within *Constituent Management*, *Profiles*, and so on. Only access to the *RE:Search* module will be prohibited.

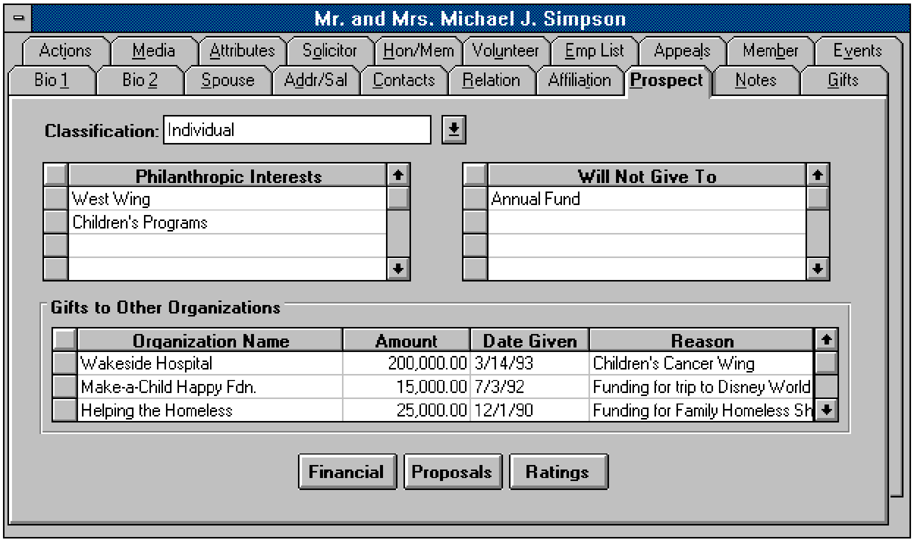
Tables Tab

Additional tables are created when *RE:Search* is installed; these tables appear on the Tables tab and can be added to by any user with the proper security to access the *Configuration* module. The additional tables are for the fields on the new Prospect tab in *Constituent Management*, including **Classification**, **Prospect Interests**, **Information Sources**, **Financial Data Types**, **Purposes**, **Instruments**, **Ratings**, and **Sources**. The fields with which these tables are linked are discussed in the *Constituent Management* portion of this chapter. You can add to these tables through the Tables tab in the *Configuration* module.

Constituent Management

Prospect Tab

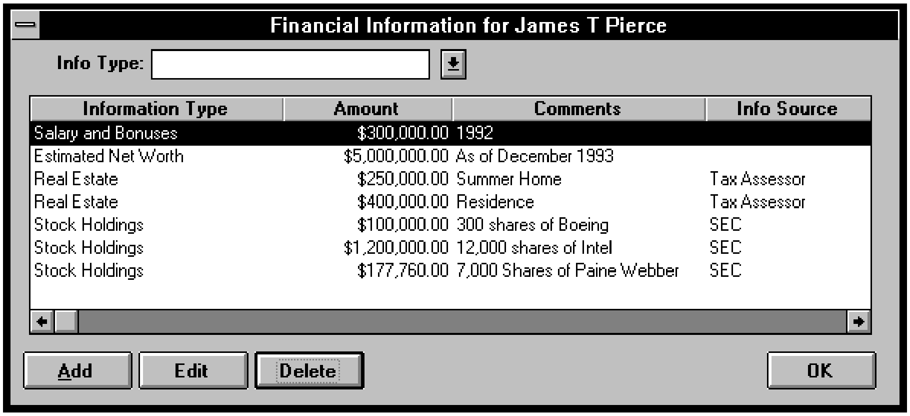
This screen shows the Prospect tab within *Constituent Management*, which displays prospect agency data.



Field Name	Description
Classification	This drop-down box identifies the type of prospect (e.g., planned giving prospect, capital campaigns prospect). Choices in this drop-down are from the **Classification** table.
Philanthropic Interests	This grid is used to identify the programs in which the prospect has a giving interest. For example, a prospect might have an interest in children's programs, library renovations, or funding a new wing. Choices in this drop-down are from the **Prospect Interests** table.
Will Not Give To	This grid is used to identify the programs in which the prospect has no interest (i.e., areas outside the giving interest). For example, a prospect might not have any interest in sports programs or new building programs. Choices in this drop-down are from the **Prospect Interests** table.
Gifts to Other Organizations	This grid tracks the gifts the prospect has given to other nonprofit organizations. This information (including organization name, amount of gift, date of gift, and reason for gift) can help you prepare your proposal by giving you information about the types of organizations this prospect supports and at what level he supports them.

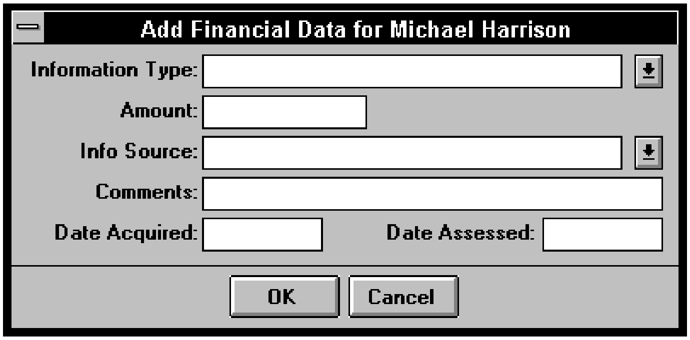
Financial Button

Clicking the **Financial** button from the Prospect tab reveals the following screen, which tracks financial information for this prospect.



The **Info Type** drop-down filter on the top of this screen contains choices from the **Financial Data Types** table.

Adding or editing financial information is done from the following screen.



Field Name	Description
Information Type	This drop-down box represents the information type or the type of asset held by the prospect. For example, enter Real Estate, Stock Holding, Inheritance, Artwork, etc. Choices in this drop-down are from the **Financial Data Types** table.
Amount	In this field enter the value of the asset.
Info Source	This drop-down box represents the source used to gather the information about the asset. For example, you could enter Court Records, Research Firm, etc. Choices in this drop-down are from the **Information Sources** table.
Comments	Use this to hold any additional information about the asset.
Date Acquired	This is the day on which the prospect acquired or purchased the asset.
Date Assessed	If the asset was appraised, enter the date on which it was appraised.

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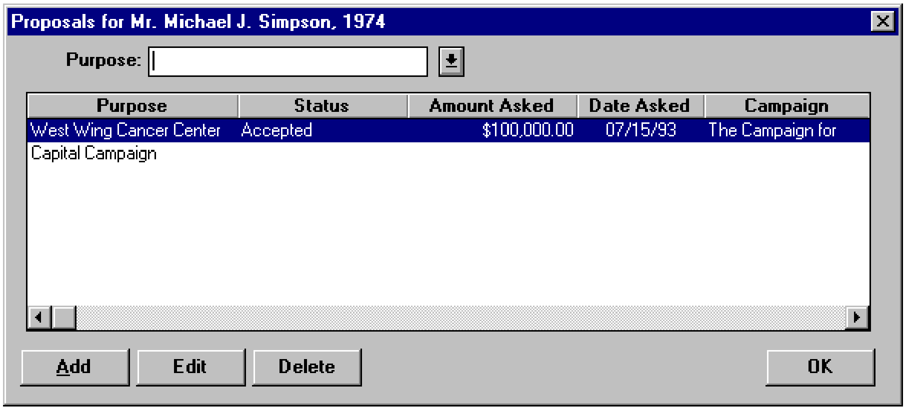
Proposals Button

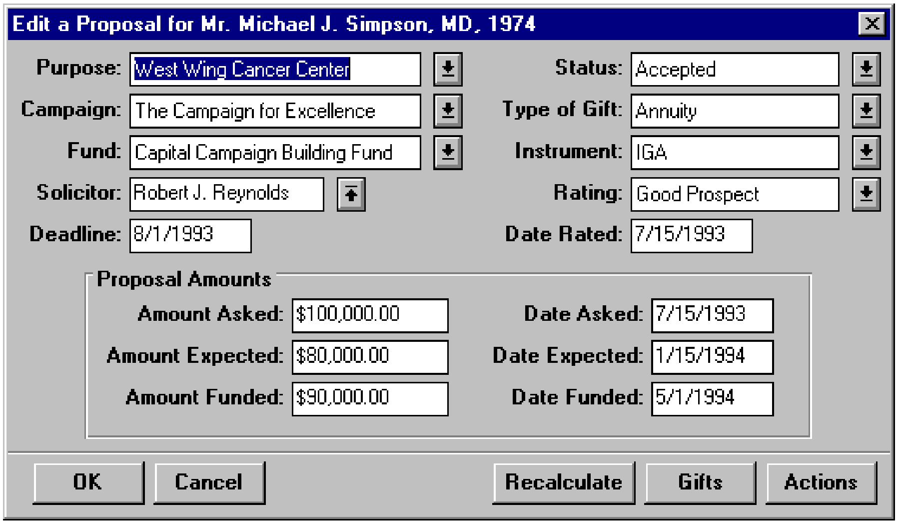
Clicking the **Proposals** button from the Prospect tab reveals the following screen, which tracks proposal-related information for this prospect.



The **Purpose** drop-down filter on the top of this screen contains choices from the **Purposes** table.

Add/Edit a Proposal Screen

Adding and editing of proposals is done from a screen like the one below, which is accessed from the **Add** and **Edit** buttons on the Proposals screen.



Field Name	Description
Purpose	This drop-down box represents the intended use of the donation generated by the proposal. For example, this might be for Building Renovations, Equipment, Scholarships, etc. Choices in this drop-down are from the **Purposes** table.
Campaign	This drop-down box represents the campaign or overall objective for raising funds. Examples may include Capital Campaign, Campaign for Excellence, Annual Giving, etc. Campaigns and Funds are established in the *Campaigns, Funds & Appeals* module.
Fund	This drop-down box establishes the fund to which a gift generated by the proposal will be attributed. The fund represents the specific financial purpose of the gift. For example, enter Library Expansion Fund, Mary S. Wilson Memorial Fund, Plant Fund, etc.
Solicitor	This look-up field indicates the person assigned to prepare and present the proposal.
Deadline	This date field indicates the date when the proposal is due.
Status	This drop-down field represents the status or where the proposal is in the process. For example, enter Initial Contact, Pending, Complete, Rejected, Funded, etc.
Type of Gift	This drop-down box represents type of gift the prospect is using or will use to fund the proposal. For example, enter Planned Gift, Cash, Pledge, etc. Choices in this drop-down are from the **Type of Gift** table.
Instrument	This drop-down box further defines the type of gift. This is particularly useful in tracking Planned Gifts. For example, if the Type of Gift is a Planned Gift, the Instrument could be Annuity, PIF, etc. Choices in this drop-down are from the **Instruments** table.
Rating	This drop-down box can be used to describe the prospect's level of interest. For example, enter Excellent Prospect, Needs Cultivation, Hesitant, etc. Choices in this drop-down are from the **Ratings** table.
Date Rated	This is the date when the rating in **Rating** field was entered.
Proposal Amounts	Enter **Amount Asked** for in proposal and **Date Asked** – date on which proposal was submitted. Enter **Amount Expected** as a result of the proposal and **Date Expected** for proposal to be granted. If prospect agreed to give as a result of proposal, enter the **Amount Funded** and **Date Funded**. These are not linked to a gift record. Record donation on Gifts tab once pledge/donation is received.

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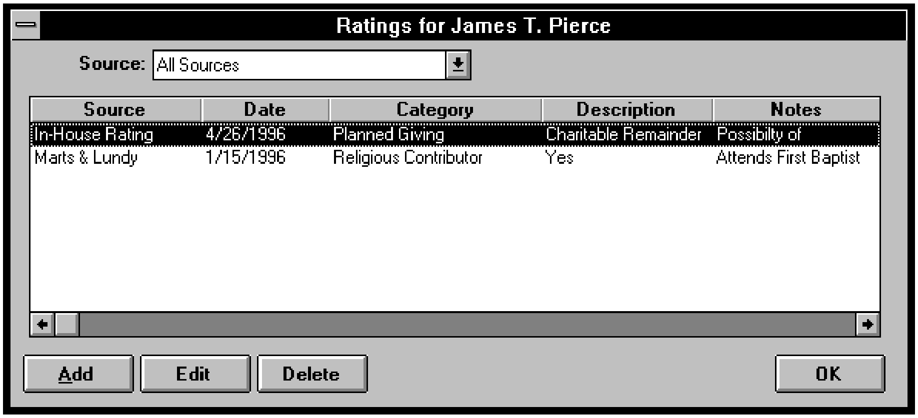
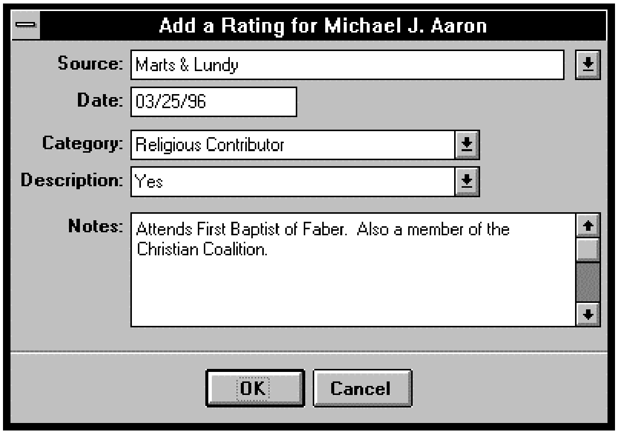
Ratings Button

Clicking the **Ratings** button from the Prospect tab reveals the following screen, which tracks rating information for this prospect.



The **Source** drop-down filter on the top of this screen contains choices from the **Sources** table. This filter allows you to designate only certain types of sources which you want to appear in the grid. Selecting a particular source in the **Source** filter will display only that source in the grid.

Adding and editing of ratings is done from a screen like the one below.



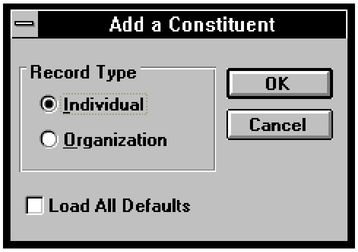
Field Name	Description
Source	This drop-down box contains the source of the rating. The prospect research program interfaces with The Whelan Group, Econometrics, Marts & Lundy, and Bentz Whaley Flessner. You can also establish your own sources. Choices in this drop-down are from the **Sources** table.
Date	This field is used to track when you received this information from a research company or when you entered this information.
Categories	This drop-down box is based upon the source selected. These are predefined by the research companies and cannot be changed. To select a category, click the small arrow to access the available choices.
Description	This drop-down box identifies the rating type (e.g., affluency, lifestyle, interest, etc.). The description field is based upon the rating category and source fields.
Notes	This field provides room for detailed information about this prospect rating.

Entering a Prospect

Entering a prospect is much like entering a regular constituent. Additional information is stored on the Prospect tab.

➢ **To enter a prospect:**

1. Select *Constituent Management* from ***The Raiser's Edge*** program group.
2. Select **File**, **New** from the menu bar. The following screen appears.



3. Indicate whether you are entering an individual or an organization. The record layout varies depending on the record type you choose.

   The **Load All Defaults** checkbox automatically inserts any default values assigned through Field Characteristics. If you do not want to accept all of the pre-assigned defaults, don't mark this checkbox. Instead, press the **F3** key in a field to accept the default for that field only.

4. Click **OK**. A blank record appears. Fill in the information beginning with the Bio1 tab. You can add relationships, affiliations, contacts, or any other information at any time.
5. Select the Prospect tab.
6. Fill in the appropriate information about this prospect's gifts and philanthropic interests.
7. Select **File**, **Save** from the menu.

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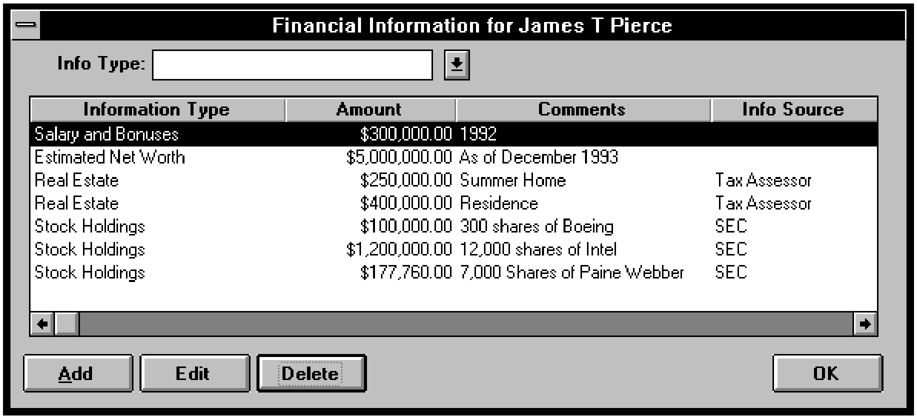
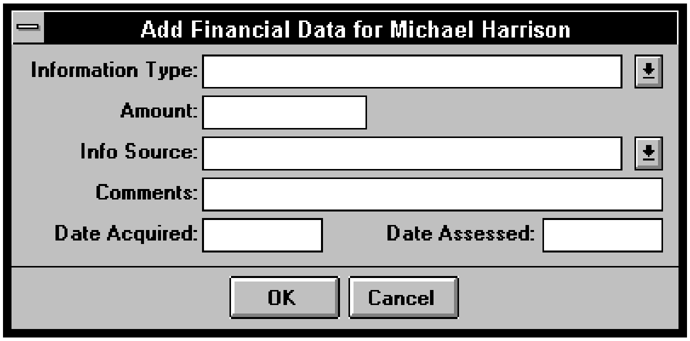
Tracking Financial Information

The **Financial** button on the Prospect tab allows you to enter and track asset/financial information about your prospects. You can store data such as salary, real estate holdings, stock holdings, and company assets. Each record stores specific information about the asset and any assessments of the value.



➢ **To add a prospect's financial information:**

1. From the Prospect tab of a constituent record, click **Financial**. The Financial Information screen appears.
2. Click **Add**. The following screen appears.



3. Enter the appropriate financial information.
4. Click **OK**. You are now back to the Financial Information screen. The data you just entered appears in the grid.
5. Click **OK** to return to the Prospect tab.

To edit prospect financial information:

1. From the Prospect tab of a constituent record, click **Financial**. The Financial Information screen appears.
2. Highlight the financial record you wish to change and click **Edit**.
3. Make any changes to the record, and click **OK**.
4. Click **OK** from the Financial Information screen to return to the Prospect tab.

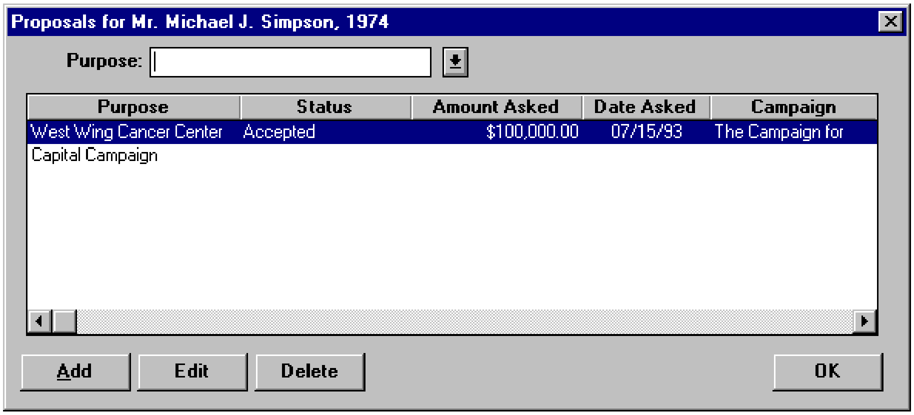
To delete prospect financial information:

1. From the Prospect tab of a constituent record, click **Financial**. The Financial Information screen appears.
2. Highlight the financial record you wish to remove and click **Delete**.
3. A verification message appears; click **Yes** to delete the financial information.
4. Click **OK** from the Financial Information screen to return to the Prospect tab.

Tracking Proposals

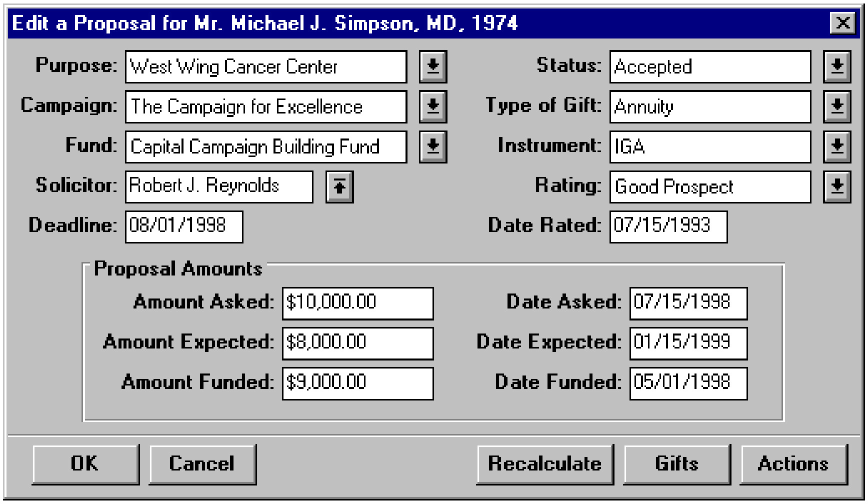
The **Proposals** button on the Prospect tab enables you to link proposals to the prospect's constituent record. You can track important information for each proposal to help you streamline your solicitation of major prospects.

Clicking on the **Proposals** button reveals the following screen.



➢ **To add a proposal:**

1. From the Prospect tab of a constituent record, click **Proposals**.
2. When the Proposal screen appears, click **Add**. The following screen appears.



3. Enter the appropriate proposal information.
4. Click **OK** to save the information. You are now back to the Proposal screen. The proposal information you just entered appears in the grid.
5. Click **OK** to return to the Prospect tab.

➢ **To edit a prospect proposal:**

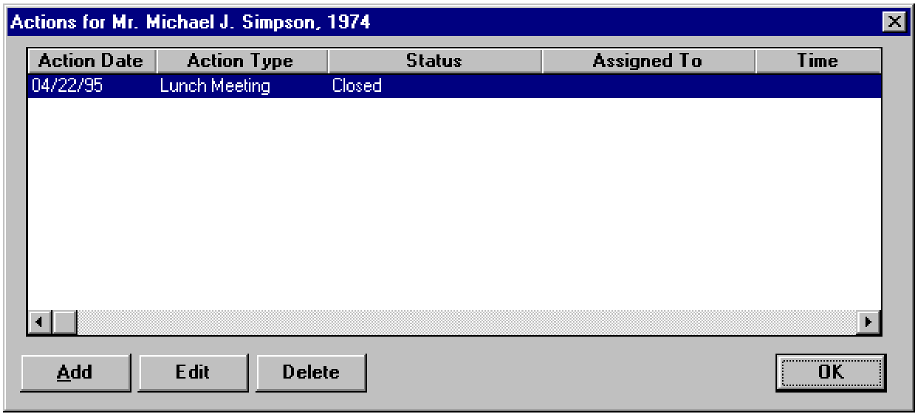
1. From the Prospect tab of a constituent record, click **Proposals**.
2. The Proposal screen appears. Highlight the proposal record you wish to change and click **Edit**.
3. Make any changes to the record and click **OK**.
4. When you are finished editing proposals, click **OK** to return to the Prospect tab.

➢ **To delete a prospect proposal:**

1. From the Prospect tab of a constituent record, click **Proposals**.
2. The Proposal screen appears. Highlight the proposal record you wish to remove and click **Delete**. A verification message appears.
3. Click **Yes** to delete the proposal.
4. Click **OK** to return to the Prospect tab.

Linking Proposals to Actions

The **Actions** button on the proposal screen links the proposal to all related actions. When selected, a list of currently linked action records appears. You can also choose to add, edit, or delete an action.

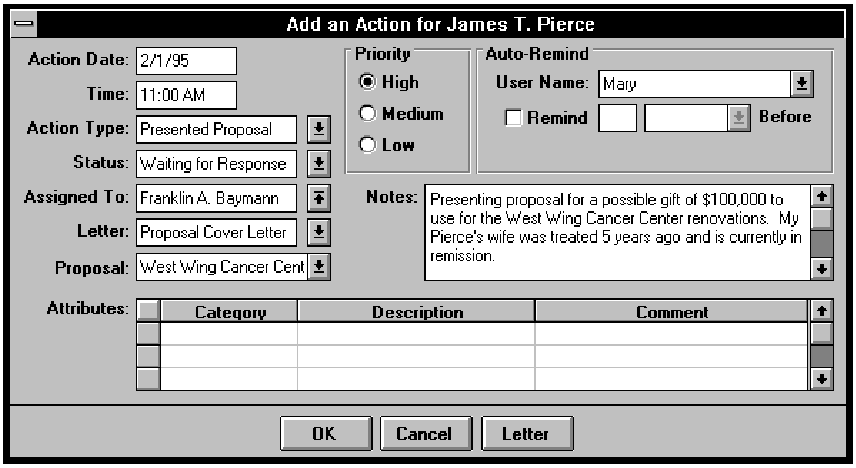


Note: For more information on Actions, please refer to *The Raiser's Edge for Windows User's Guide.*

➢ **To add a new action:**

1. From the Prospect tab of a constituent record, click **Proposal**.
2. The Proposal screen appears. Highlight the proposal record to which you wish to add an action and click **Edit**.
3. When the proposal record appears, click **Actions**.

4. When the Action screen appears, click **Add**. The Add an Action screen appears.



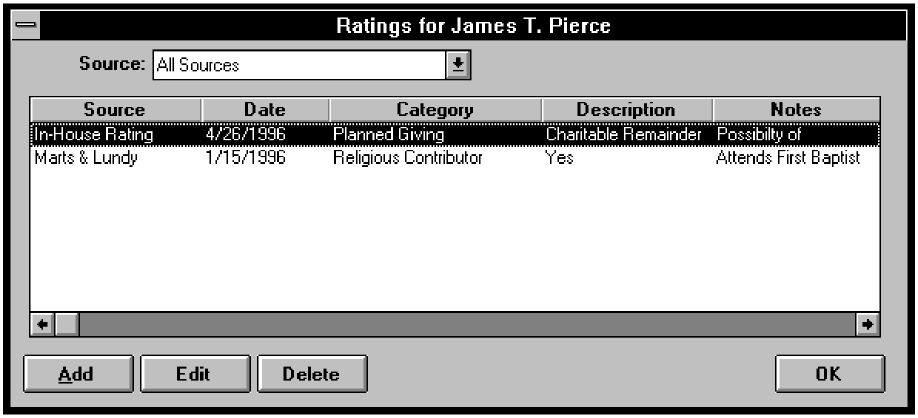
5. Fill in the appropriate information. The **Letter** button uses the entry in the **Letter** field to prepare a document to send to the constituent. Use the Letters tab of *Configuration* to define the different word processing documents you use.

6. Click **OK** to save the action.

Note: Attributes are defined using the Attributes tab in *Configuration*. For more information, refer to *The Raiser's Edge for Windows Administrator's Guide*.

Tracking Prospect Ratings

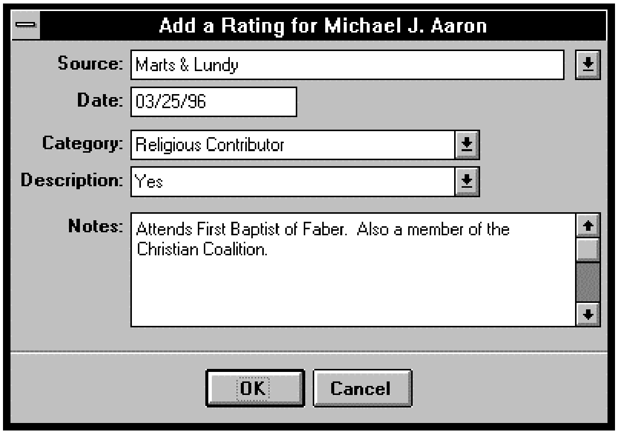
The **Ratings** button on the Prospect tab allows you to view or add ratings information. It stores both ratings defined by your organization and ratings received from a prospect research company. Each ratings record stores detailed information about the potential donor. The prospect research program interfaces with The Whelan Group, Econometrics, Marts & Lundy, Bentz Whaley Flessner, CDA/Investnet, and POW&R. You can also establish your own sources and categories for ratings.



➢ **To add prospect ratings:**

1. From the Prospect tab of a constituent record, click **Ratings**.

2. When the Ratings screen appears, click **Add**. The Add a Rating screen appears.



3. Enter the appropriate ratings information.
4. Click **OK** to save the rating information. You are now back to the Ratings screen. The rating information you just entered should appear in the grid.
5. Click **OK** to return to the Prospect tab.

➢ **To edit prospect rating information:**

1. From the Prospect tab of a constituent record, click **Ratings**.
2. When the Ratings screen appears, highlight the rating to change and click **Edit**.
3. Make changes to the record and click **OK** to save the changes.
4. Click **OK** to return to the Prospect tab.

➢ **To delete prospect rating information:**

1. From the Prospect tab of a constituent record, click **Ratings**.
2. When the Ratings screen appears, highlight the record to remove and click **Delete**.
3. A verification message appears. Click **Yes** to delete this prospect rating.
4. Click **OK** to return to the Prospect tab.

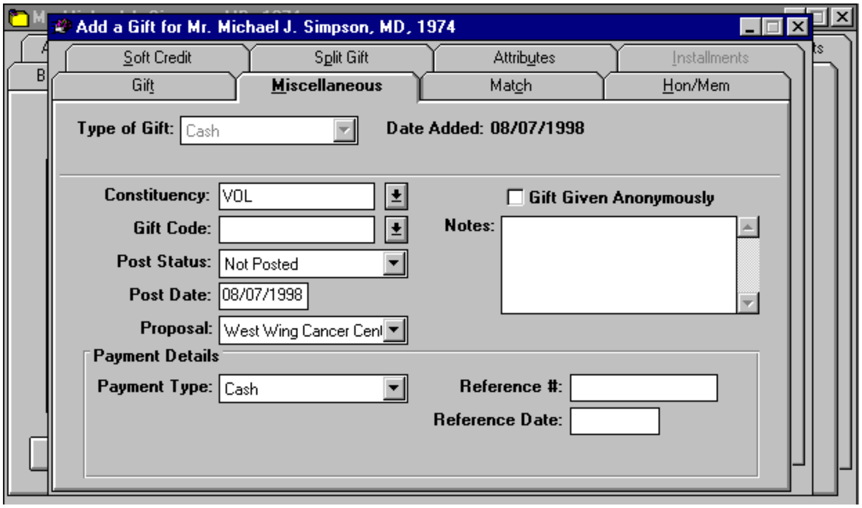
Linking a Proposal to a Gift

Each gift can be linked to a constituent proposal. The **Proposal** is available on the Miscellaneous tab for gifts. A drop-down menu displays a list of available proposals found on the constituent record. Multiple gifts can be linked to the same proposal. Additionally, when a pledge payment is applied to a pledge that has a proposal linked to it, the payment is automatically linked to that same proposal.

➢ To link a gift to a proposal

1. From *Constituent Management*, select **File**, **Open** to locate the constituent record.
2. Select the Gifts tab.
3. Click **Add** and the Gift screen appears.
4. Enter the gift information (e.g., **Amount**, **Date**, **Fund**, etc).
5. Click the Miscellaneous tab.
6. In the **Proposal** field, use the drop down arrow to select the proposal to which you are linking the constituent's gift.
7. Select **File**, **Save** to save the gift information.

Note: The drop-down menu only displays a list of available proposals found on the constituent record. To add a proposal you must go to the Prospect tab.



A warning message appears, if you add or edit a gift and use a fund, campaign, gift amount, gift date, or solicitor that is not the same as the fund, campaign, amount funded, date, funded, and solicitor found on the proposal. This warning message appears when you save the gift and asks if you would like to use the information specified on the proposal.

8. Click **Yes** if you want the information on the proposal used in place of the information entered in the **Amount**, **Date**, **Campaign** and **Fund** fields.

9. Click **No** if you want the gift to be saved as entered.

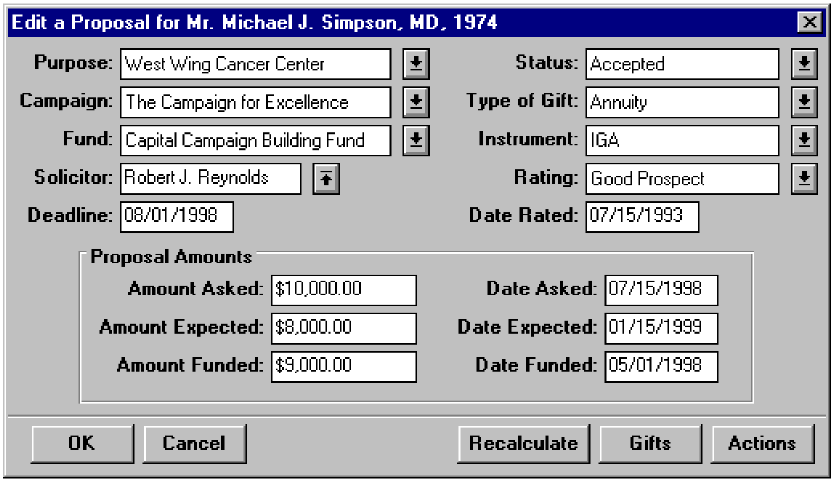
Note: If you select a proposal on the Miscellaneous tab, the **Fund**, **Campaign**, **Solicitor**, **Date**, and **Amount** fields default from the proposal if information is not entered in those fields.

Viewing Gifts Linked to a Proposal

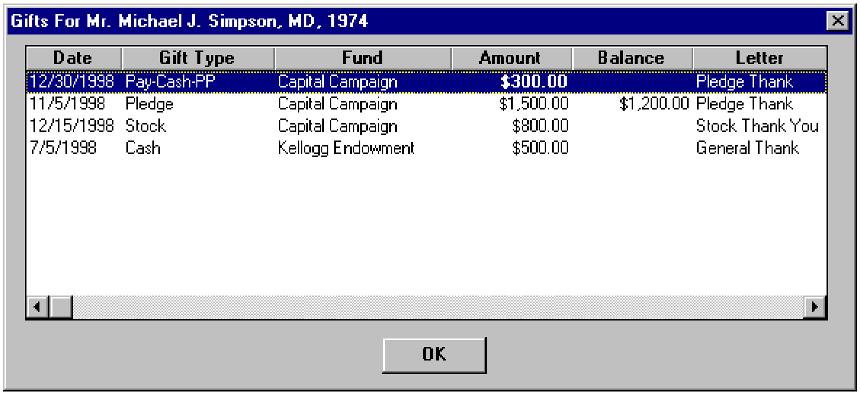
Once you have linked a gift(s) to a proposal, you can also edit a proposal on the Prospect tab and view the gifts linked to that proposal through the **Gifts** button.

➢ **To edit the gift information**

1. From *Constituent Management*, select **File**, **Open** to locate the constituent's record.
2. Select the Prospects tab.
3. From the Prospect tab, select the **Proposals** button and the following screen appears.



4. Select the **Gifts** button to view the gifts that are linked to the proposal. A list of gifts appears.



Note: To edit any of the gift information, you must go to the Gifts tab in the constituent record and edit the gift that was linked to the proposal.

Reports

A Proposal column is available in the Gift Entry Validation report under Financial reports to the far right of the report. This column lists the proposal linked to the gift.

The Proposal Detail report, Proposal Analysis report, Proposal Follow Up report, and Proposal Gift Report are available in the Prospect Reports category under Financial reports. The **Proposal Purpose** field is an option in the Comparison and Summary reports.

Note: For more information on Reports, refer to the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*. To see a sample of the report, refer to *The Raiser's Edge for Windows Reports Manual.*

Profiles

Using the *RE:Profiles* module, you can create a custom profile of the information you store for the prospect. Use these profiles to present to solicitors, board members, or to maintain a hard copy of data in a prospect's record. Save the formats to re-use at a later time. Profiles are easy to create because you select the type of information to include and assign headings for each block of information. You can also apply formatting to make your profile more attractive and easier to read.

Note: For more information on profiles, please see *The Raiser's Edge for Windows* User's Guide.

Prospect Profiles

➢ **To produce a prospect profile:**

1. Select *RE:Profiles* from ***The Raiser's Edge*** program group.
2. Select **File**, **New** from the menu bar. The **Add a New Profile** screen appears.

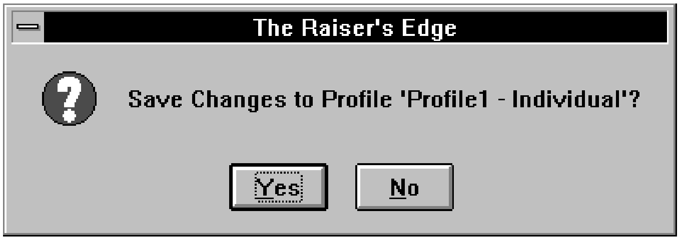
3. In the **Profile Type** box, select the type of profile you are creating.
4. Click **OK**. The Profile screen appears.
5. Enter the appropriate information on the General tab.
6. Click on the Contents tab. The Contents tab on the Profile screen appears.
7. Enter the appropriate information on the Contents tab. Once you have selected all of the information for the profile, you are ready to save, preview, or print it.

➢ **To process the profiles:**

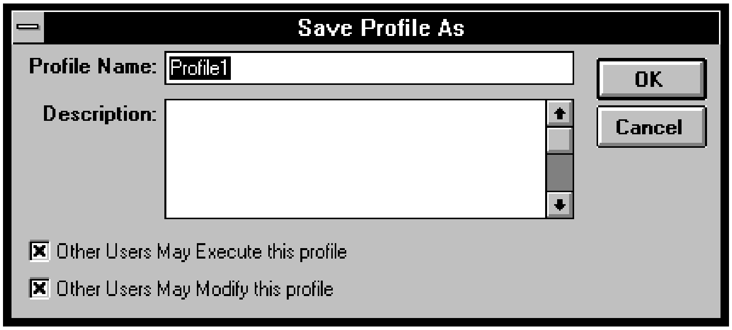
1. If you choose to process the profiles, the system requires you to specify the constituents for whom you are printing profiles. Select the option to print, preview, export, or email. The following screen appears.

2. In the Records to Include box, indicate whether you are preparing the profile for **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, an additional prompt, **From Group**, appears. This allows you to specify a query to use as the basis for the profiles. If you are designing the profile for one constituent, an additional prompt, **Name**, gives you access to the Constituent Search Criteria box so you can locate the appropriate record.

3. Click **OK**. The following message appears.



4. If you want to save the changes, click **Yes**. The following screen appears.



In the **Profile Name** box, enter a name under which the profile format should be saved. The system assigns a default, but it is best to use a more descriptive name.

Use the **Description** box to describe the profile in more detail, perhaps enter the purpose for the profile.

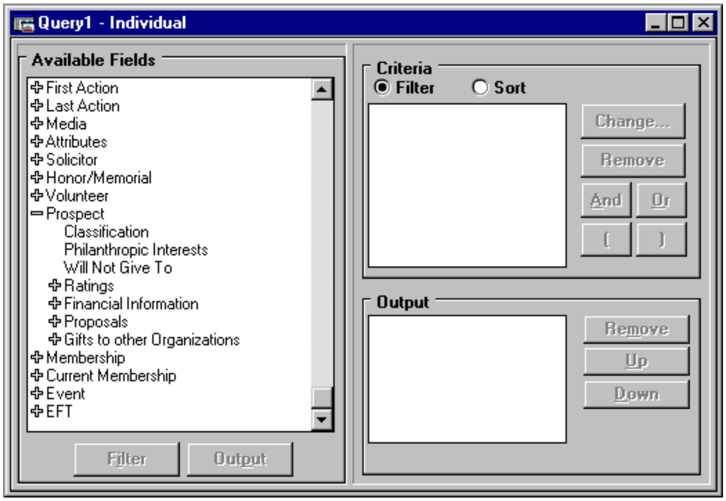
Select the prompt **Other Users May Execute this profile** if you wish to allow other users, with rights to *RE:Profiles*, to use this format.

The **Other Users May Modify this profile** prompt, when selected, enables other users to make change to your profile design. If you do not want others to edit your profile, you may wish to restrict users from making changes.

5. Click **OK** to save the profile and begin processing.

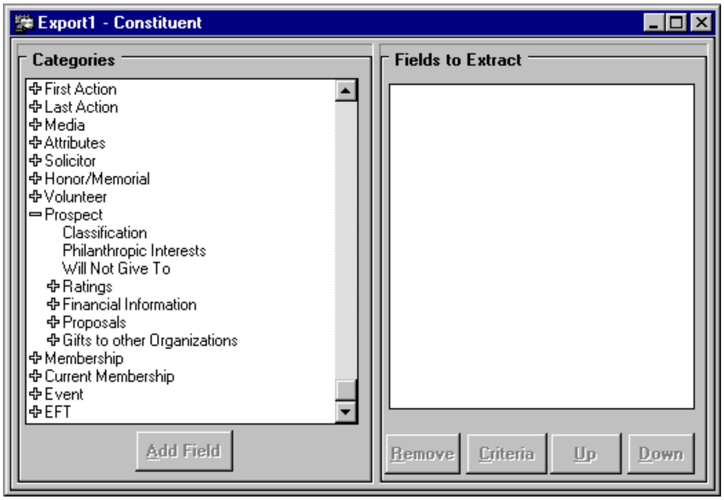
RE:Query

Prospect fields are available for queries under the category **Prospect**.



RE:Export

Prospect fields are available for exports under the category **Prospect**.



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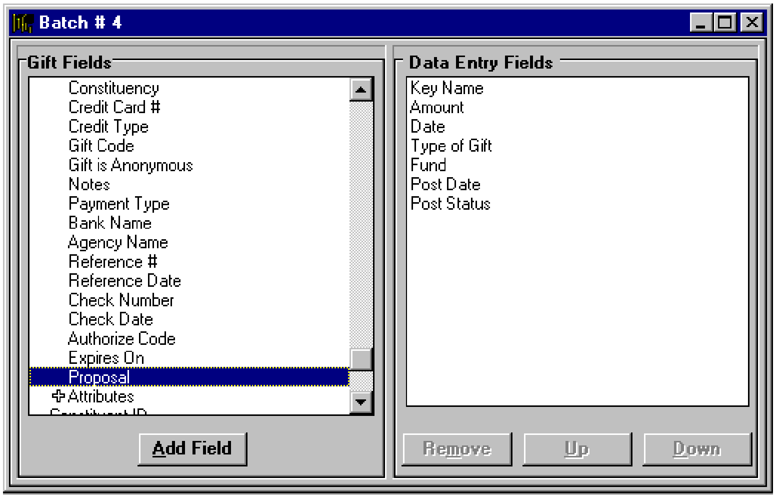
RE:Batch

Link a proposal to a gift using the **Proposal** field under the Gift category in *RE:Batch*.



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C H A P T E R 3

Working with Econometrics

In This Chapter

Econometrics Requirements

Econometrics requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

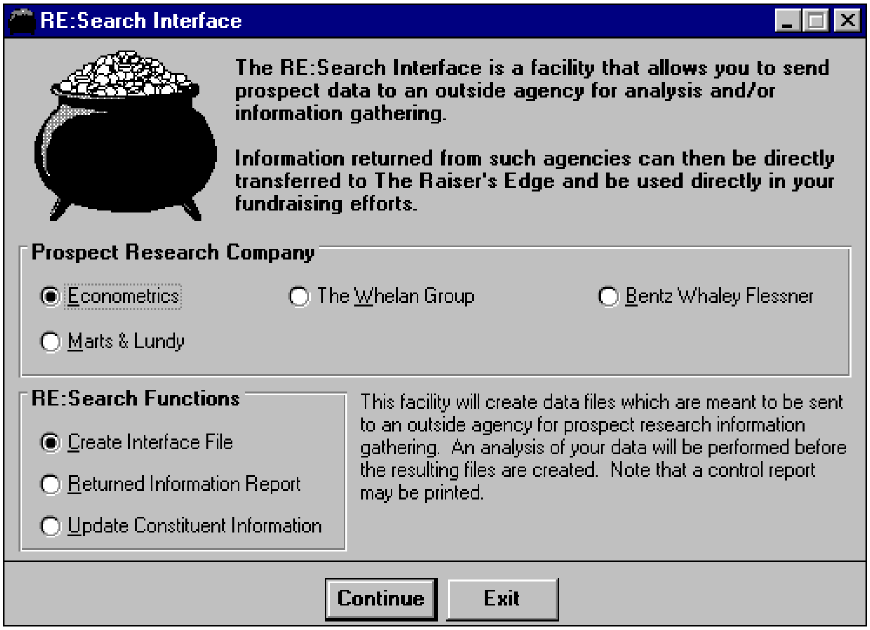
Creating the Interface File

For Econometrics to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the file. You can select constituents to include in this file by using a existing query or by selecting all constituents. This file can be placed on diskette(s) that you send to Econometrics. Econometrics reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there is a Wizard that will prompt you for the appropriate parameters. These parameters are saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

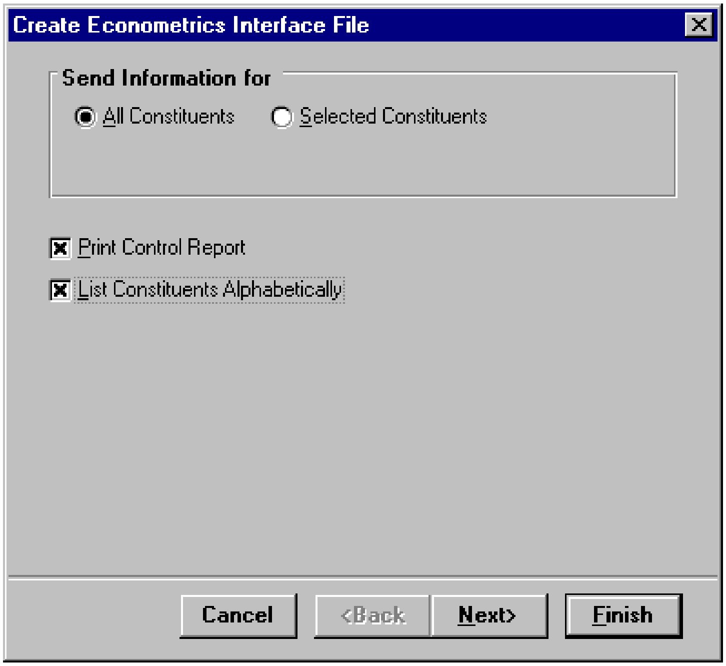
➢ **To create an interface file:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Econometrics** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create Econometrics Interface File screen appears.



4. Select either the **All Constituents** or **Selected Constituents** radio button, depending on which you want your data file for Econometrics to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click on  to select from a list of available queries.

5. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to Econometrics.

6. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

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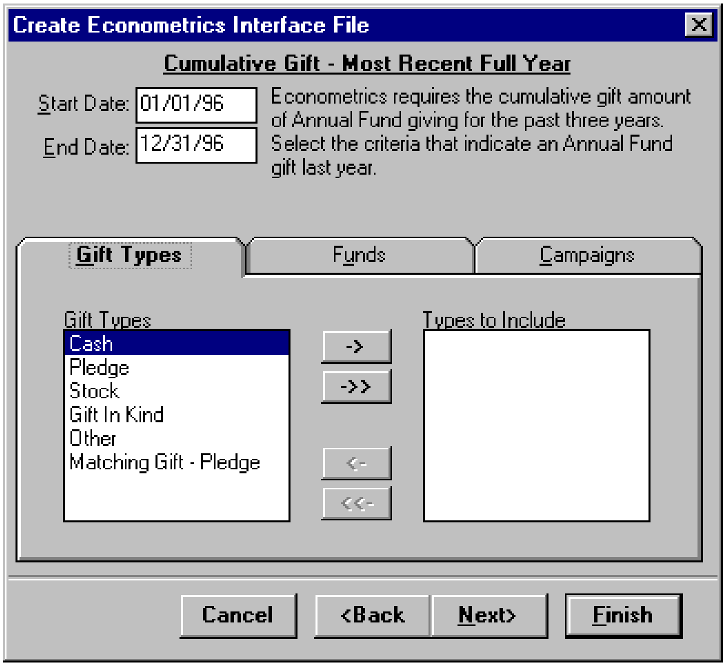
7. Click **Next** to continue. The following screen appears.



8. This screen allows you to enter cumulative gift information for the most recent full year, which Econometrics requires. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year.

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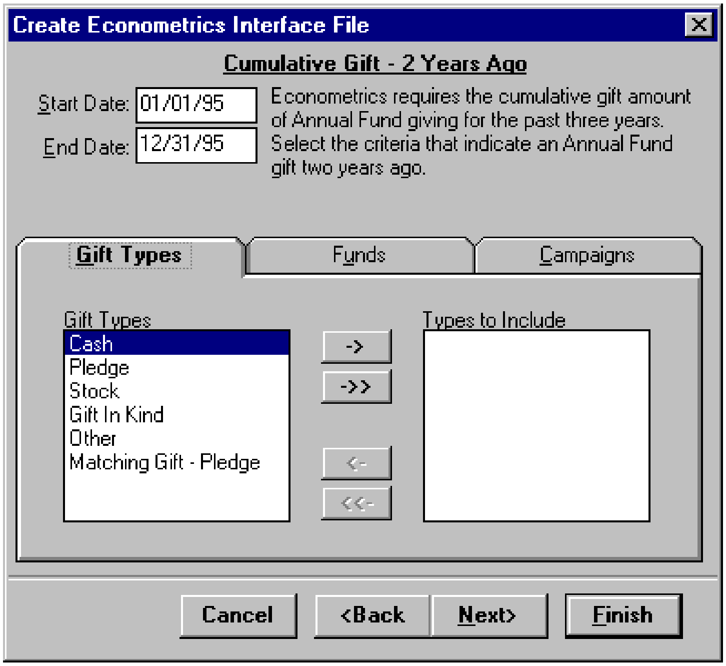
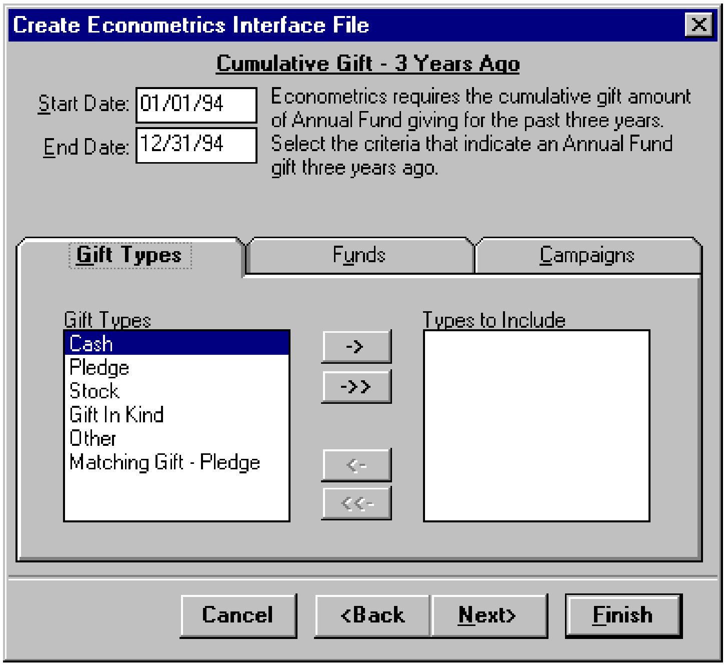
9. Click **Next**. The following screen appears.



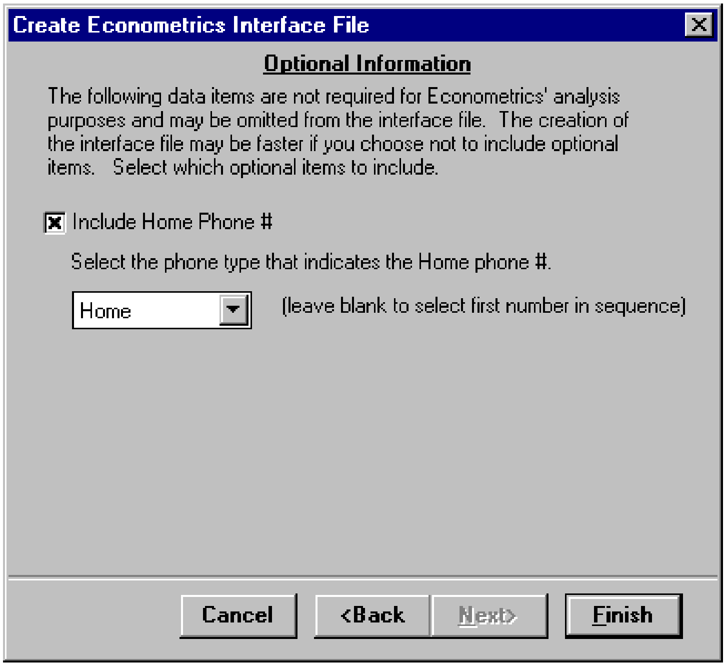
10. This screen allows you to enter cumulative gift information for two years ago, which Econometrics requires. Enter the start and end dates for the full year, two years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for two years ago.

11. Click **Next**. The following screen appears.



12. This screen allows you to enter cumulative gift information for three years ago, which Econometrics requires. Enter the start and end dates for the full year, three years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for three years ago.

13. Click **Next**. The following screen appears.



14. This screen allows you to select whether to include optional information – that is information that is not required by Econometrics. Including any of the optional items may slow down the creation of the interface file.

15. For Econometrics you can optionally specify to include the home phone number of the prospects in your interface file. If the home phone number is included, you can designate which number to use or the system will pick the first phone number listed for the prospect.

16. Mark any additional optional items you choose and click **Finish**.

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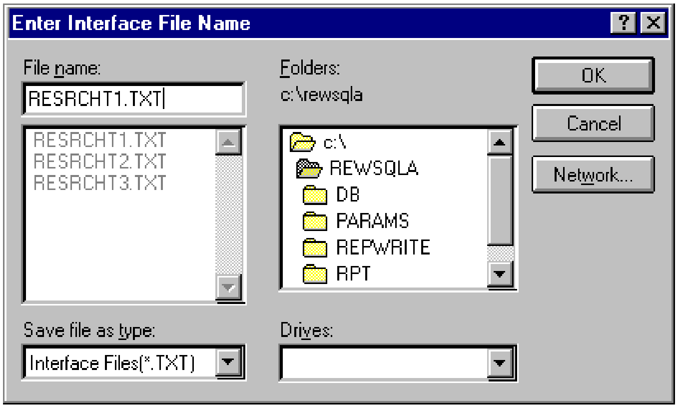
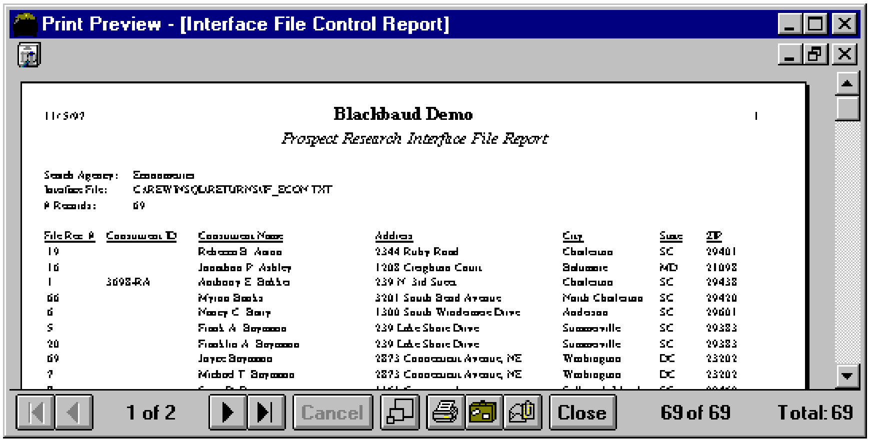
17. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



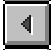
18. Click **OK** when you've entered the appropriate file name and path (location). A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

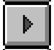
    Otherwise, a report of the records included in the interface file appears on the screen.

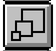
    From this report window, you can use the standard buttons to navigate and perform specific tasks.

     Go to the first page of the report.

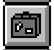
     Go back one page.

     Go forward one page.

     Go to the last page of the report.

     Zoom the report to make it larger or smaller.

     Print a hard copy to the printer set as the default in Windows.

     Export the report to a file.

     Send the report to another user via e-mail.

    You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

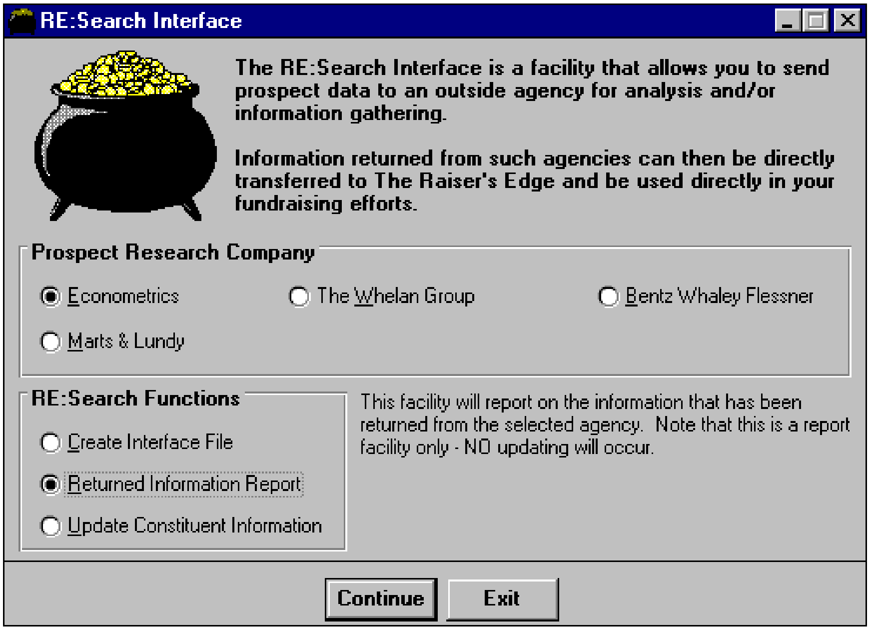
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

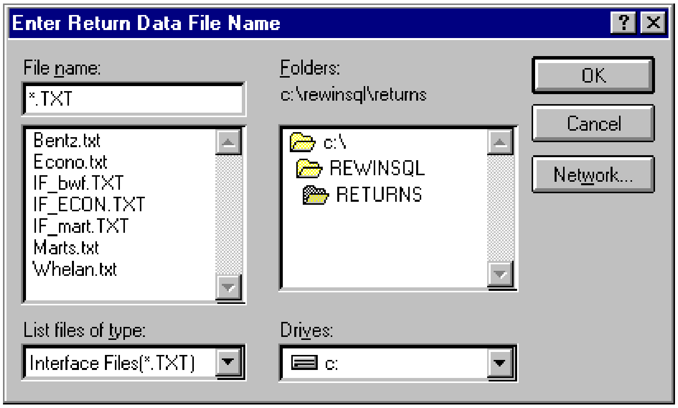
➢ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.

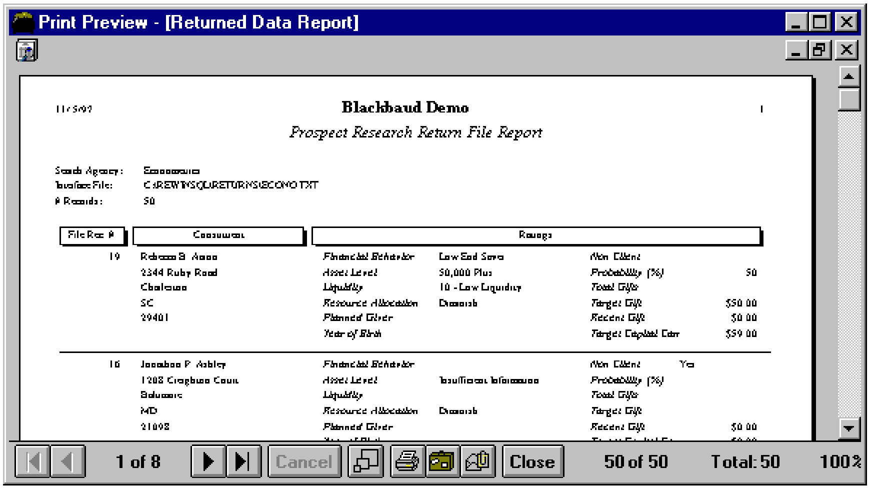


2. Select the **Econometrics** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



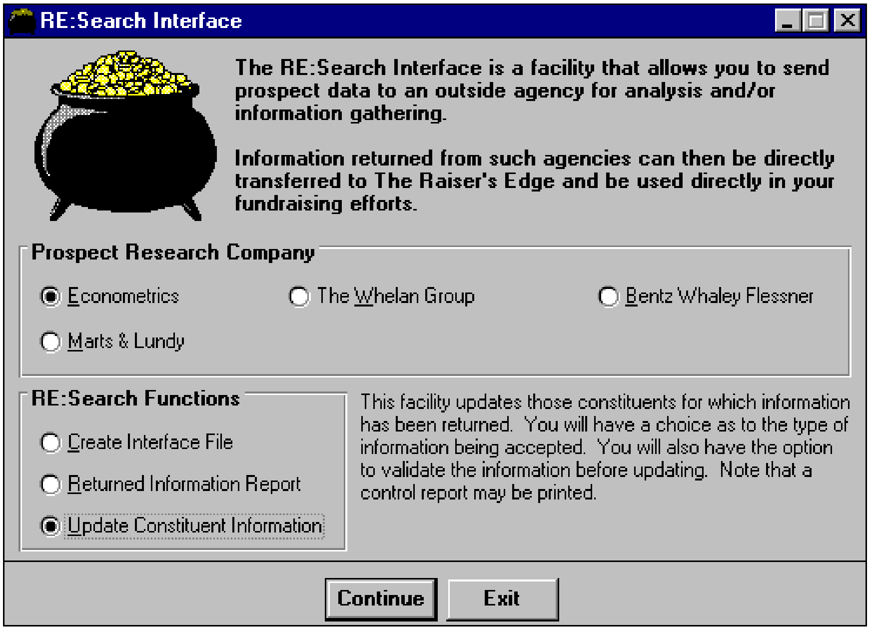
Use the standard buttons to navigate and perform specific tasks.

Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via the constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

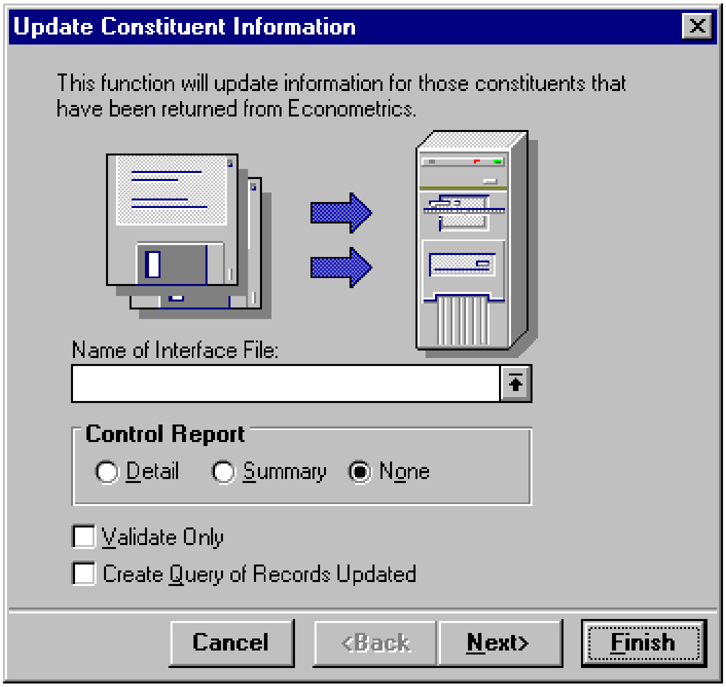
➢ **To update your constituent information:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Econometrics** radio button for the Prospect Research Company and select the **Update Constituent Information** radio button for the RE:Search Functions.

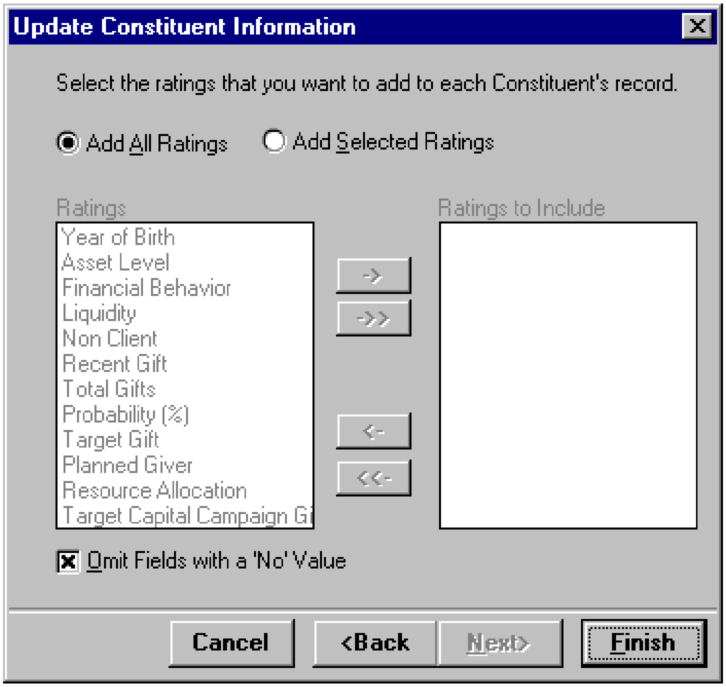
3. Click **Continue**. The following screen appears.



4. Enter the path (location) and name of the interface file that you received from Econometrics or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

   You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

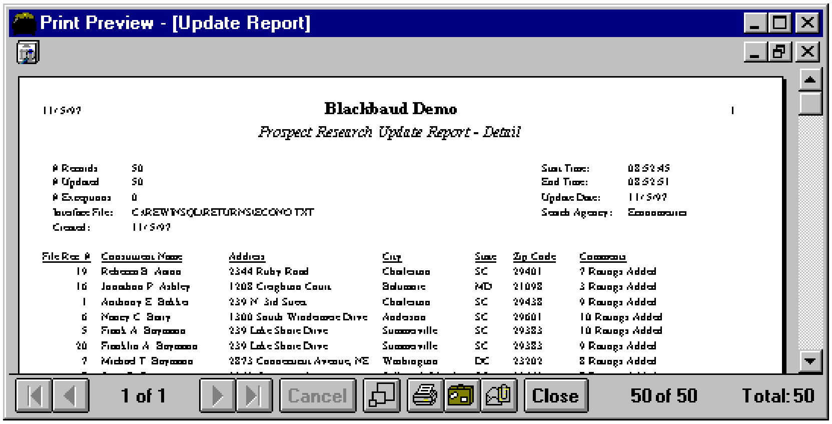
5. Click **Next**. The following screen appears.



6. From this screen you can select to add all of the ratings that have been returned to you from Econometrics or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a 'No' Value** by marking the checkbox. This means any returned ratings with a 'No' value will not be added to the constituent's rating information upon update. For example, if a prospect constituent receives a 'No' rating from Econometrics based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

7. Click **Finish**.

8. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report, in either detail or summary form, may appear.



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CHAPTER 4

Working with Marts & Lundy

In This Chapter

Marts & Lundy Requirements

Marts & Lundy requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

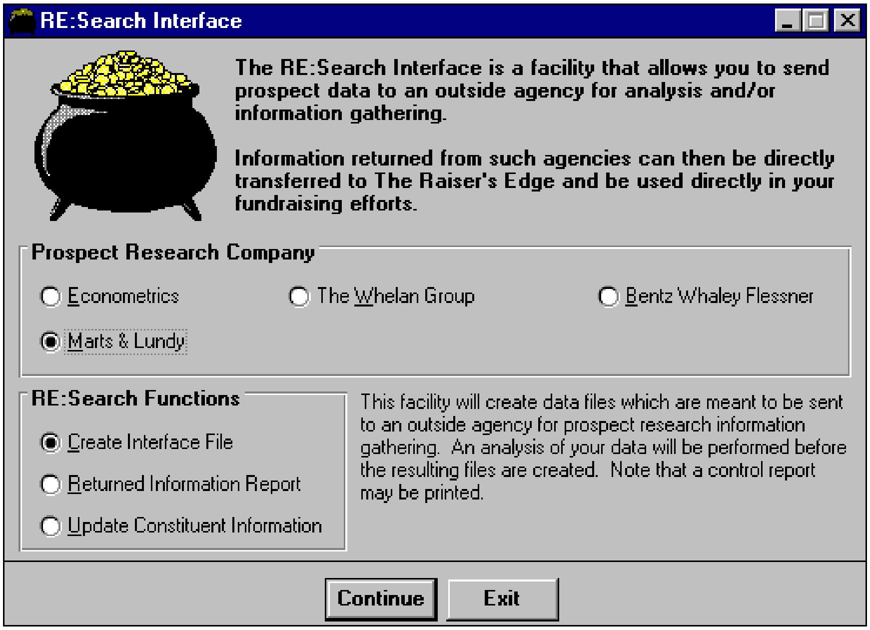
Creating the Interface File

For Marts & Lundy to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the file. You can select constituents to include in this file by using a existing query or by selecting all constituents. This file can be placed on diskette(s) that you send to Marts & Lundy. Marts & Lundy reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there will be a Wizard that will prompt you for the appropriate parameters. These parameters will be saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

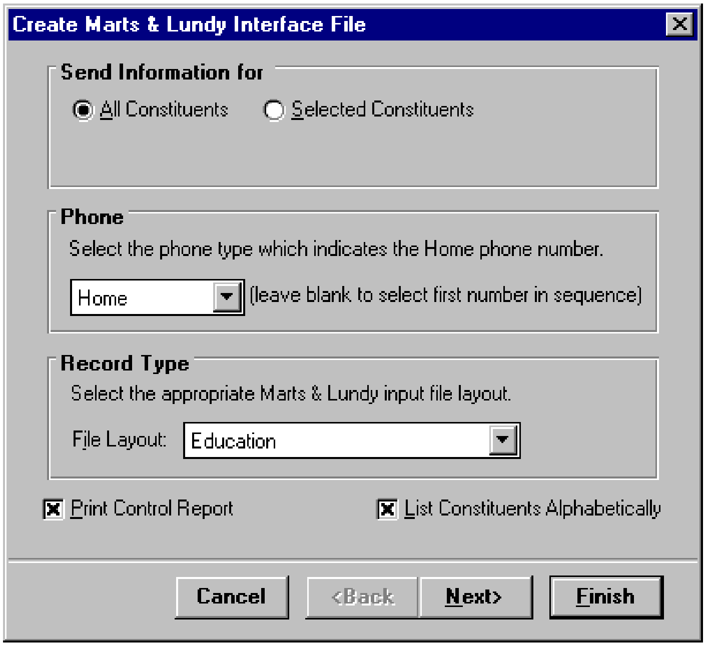
➢ To create a Marts & Lundy interface file:

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Marts & Lundy** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create Marts & Lundy Interface File screen appears.



4. Select either the **All Constituents** or **Selected Constituents** radio button, depending on which you want your data file for Marts & Lundy to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click on  to select from a list of available queries.

5. Under the phone option, select the phone type that indicates the home phone number of your prospect constituents.

6. Select the appropriate record type for the input file layout; Marts & Lundy should provide the correct layout type.

Note: The file layout selected will affect the series of screens to follow. Please see the section Alternate Screens after this procedure for other possible screens that may appear depending upon the file layout you select. This procedure follows the Education file layout.

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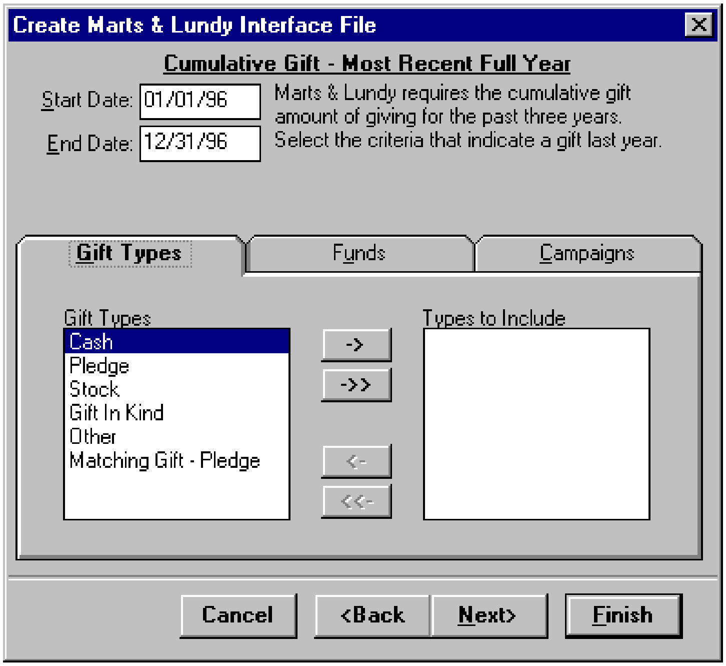
7. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to Marts & Lundy.

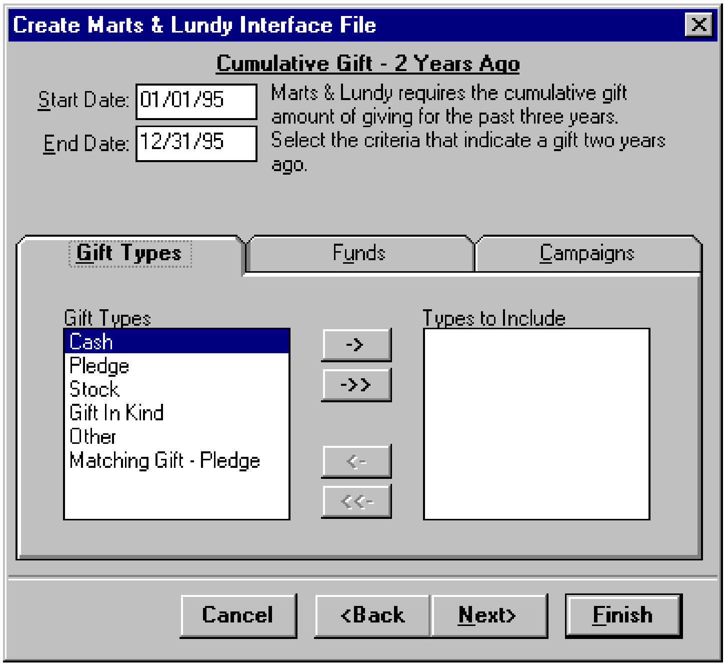
8. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

9. Click **Next** to continue. The following screen of options appears.



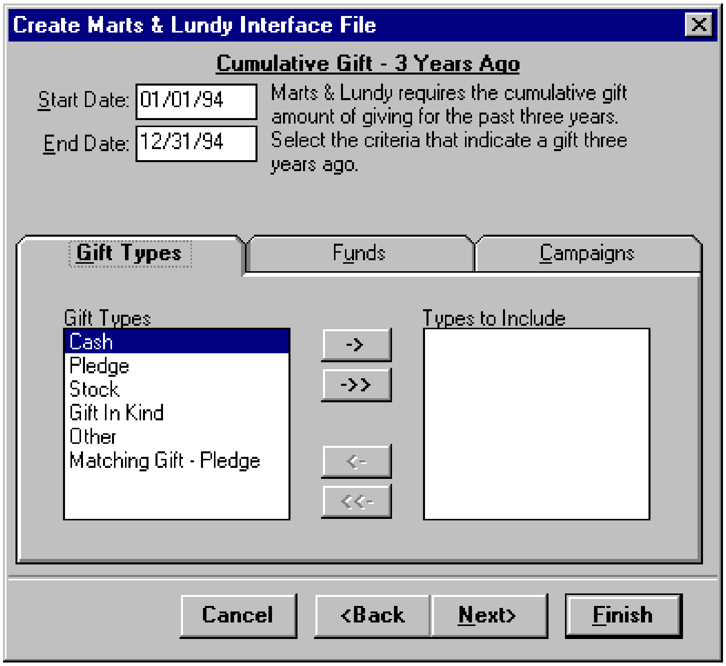
10. This screen allows you to enter cumulative gift information for the most recent full year, which Marts & Lundy requires. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year.

11. Click **Next**. The following screen appears.



12. This screen allows you to enter cumulative gift information for two years ago, which Marts & Lundy requires. Enter the start and end dates for the full year, two years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for two years ago.

13. Click **Next**. The following screen appears.



14. This screen allows you to enter cumulative gift information for three years ago, which Marts & Lundy requires. Enter the start and end dates for the full year, three years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for three years ago.

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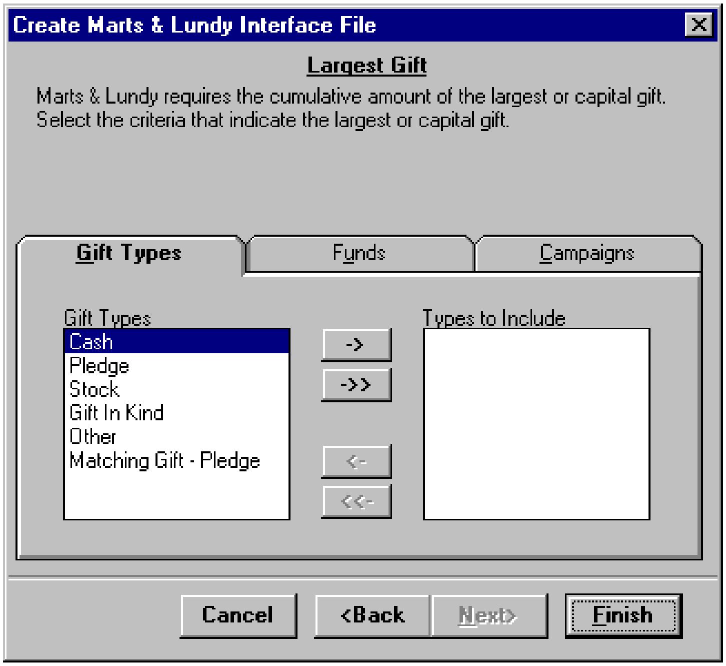
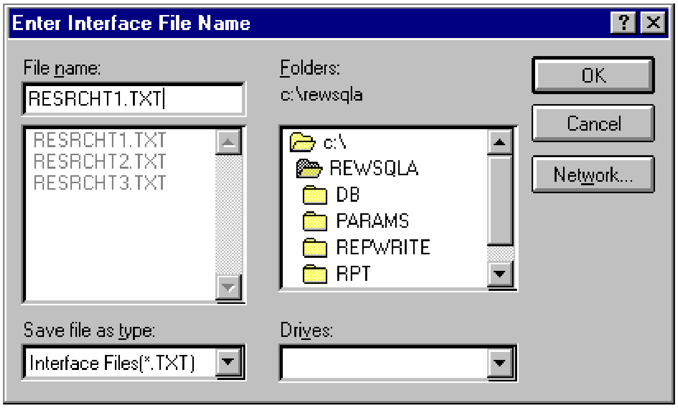
15. Click **Next**. The following screen appears.



16. This screen allows you to enter information about the largest gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.

17. Click **Finish**. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



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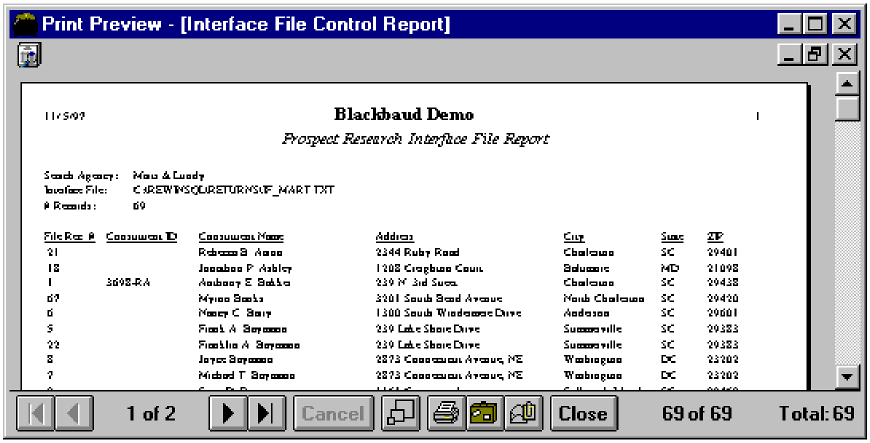
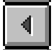
18. Click **OK** when you've entered the appropriate file name and path (location). A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

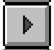
    Otherwise, a report of the records included in the interface file appears on the screen.

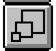
    From this report window, you can use the standard buttons to navigate and perform specific tasks.

     Go to the first page of the report.

     Go back one page.

     Go forward one page.

     Go to the last page of the report.

     Zoom the report to make it larger or smaller.

     Print a hard copy to the printer set as the default in Windows.

     Export the report to a file.

     Send the report to another user via e-mail.

    You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

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Alternate Screens (according to file layout selected)

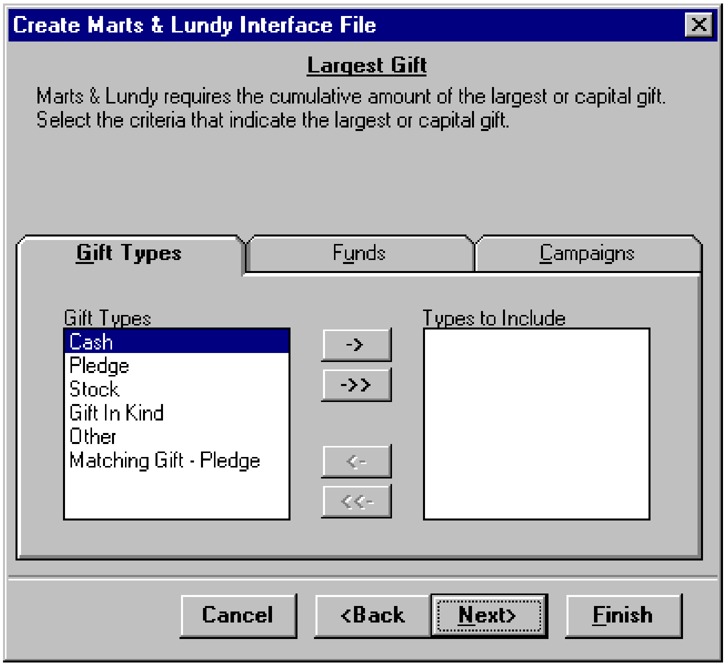
Education

The series of screens for this file layout are depicted in the procedure above.

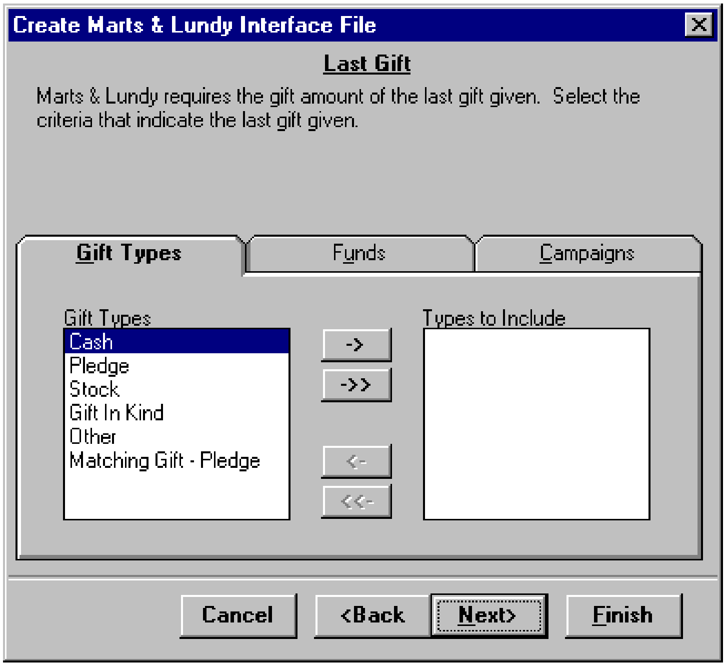
Membership

The **Membership** file layout has a series of screens that varies from the ones detailed in the procedure above, which used the **Education** file layout.

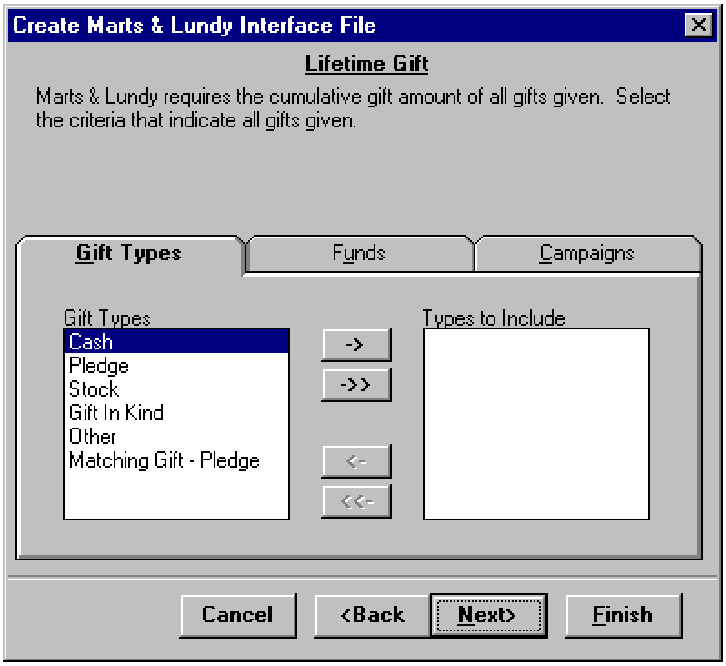
After selecting **Membership** for the file layout, the Largest Gift screen appears. This screen allows you to enter information about the largest gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.



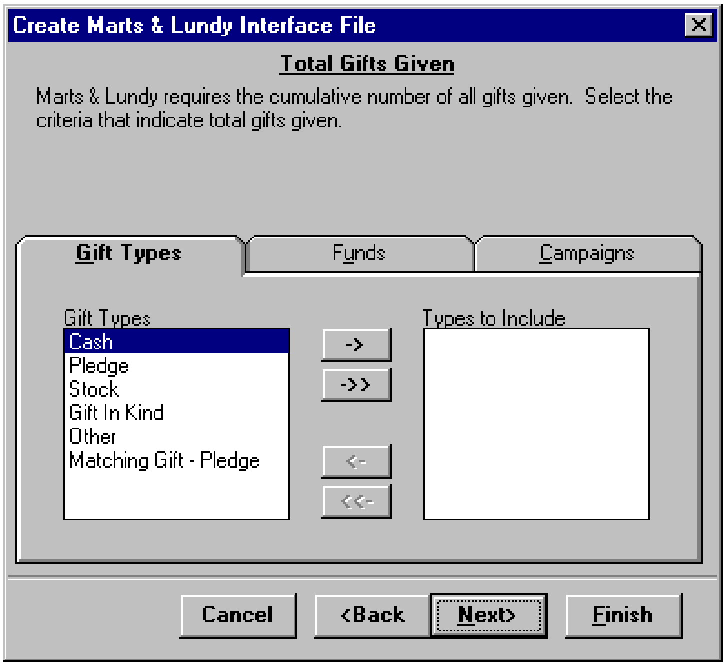
Next the Last Gift screen appears. This screen allows you to enter information about the last gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.



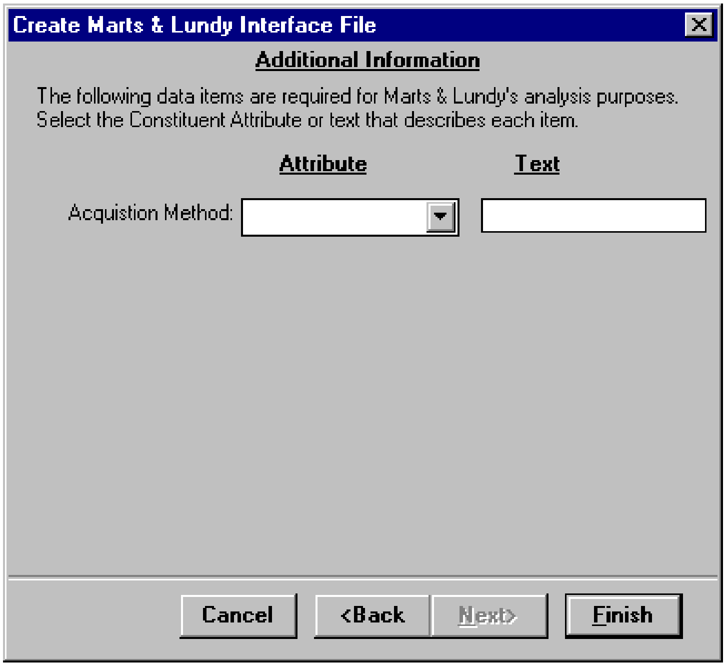
The Lifetime Gift screen appears. This screen allows you to enter information about the cumulative gift amount of all gifts given. Click on the series of tabs to select the gift types, funds, or campaigns to include.



Then the Total Gifts Given screen appears. This screen allows you to enter information about the total number of all gifts given. Click on the series of tabs to select the gift types, funds, or campaigns to include.



The Additional Information screen appears. On this screen you must select certain attribute or text information for data item(s) which Marts & Lundy requires for analysis.



The next screen to appear is the Enter Interface File Name screen shown in Step 17 above. The remaining screens are the same as in the detailed procedure.

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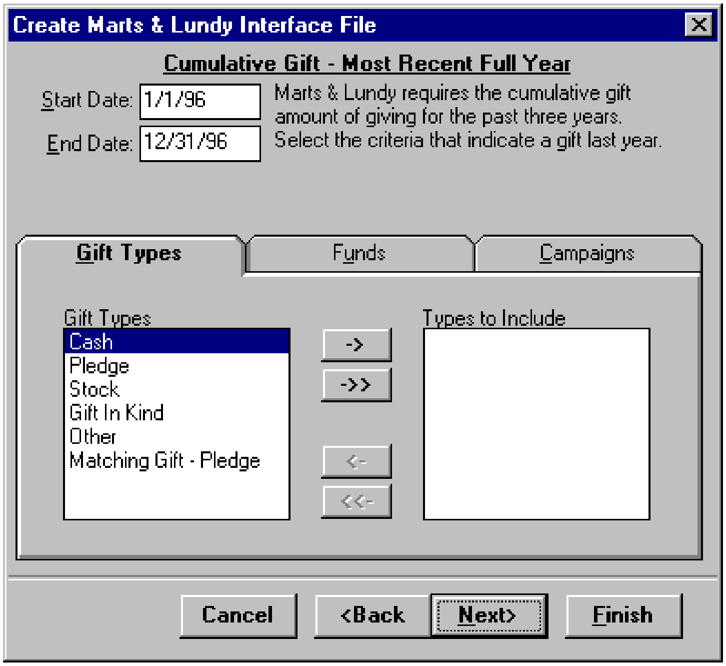
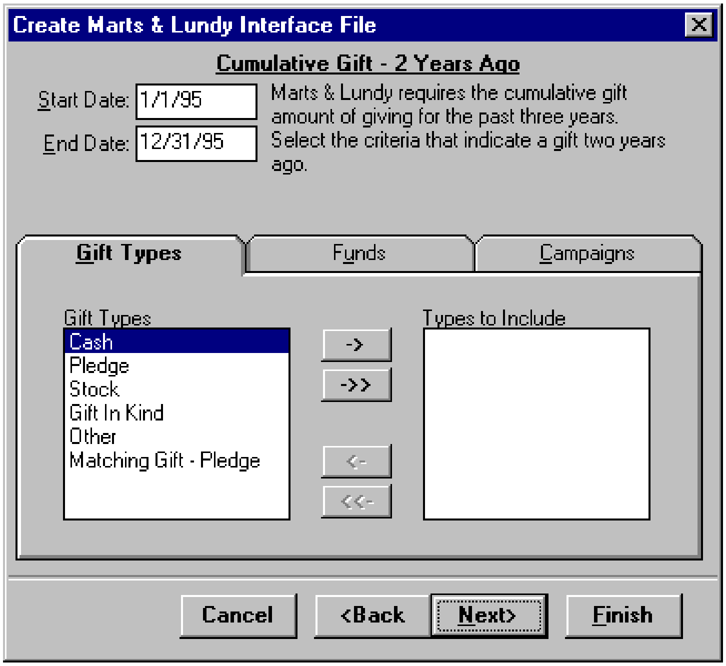
Hospital Donor

The **Hospital Donor** file layout has a series of screens that varies from the ones detailed in the procedure above, which used the **Education** file layout.

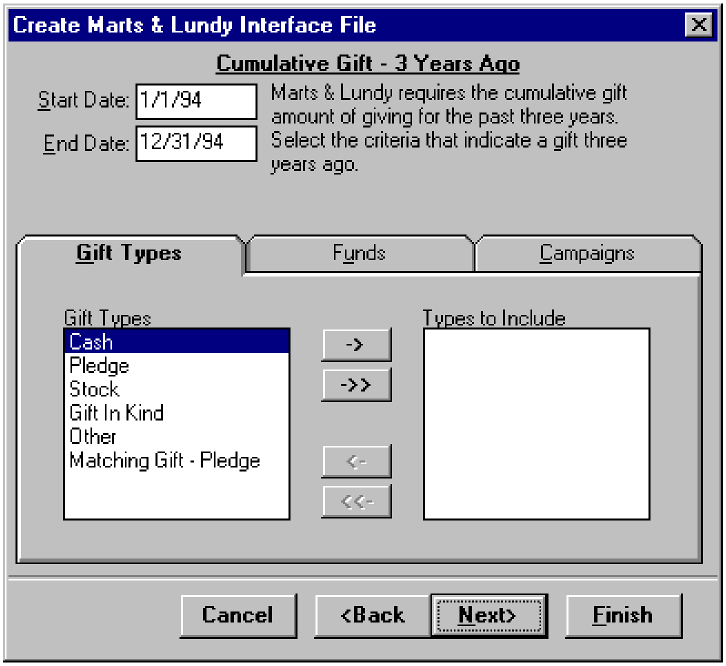
After selecting **Hospital Donor** for the file layout, the Cumulative Gift – Most Recent Full Year screen appears. This screen allows you to enter cumulative gift information for the most recent full year, which Marts & Lundy requires. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year.



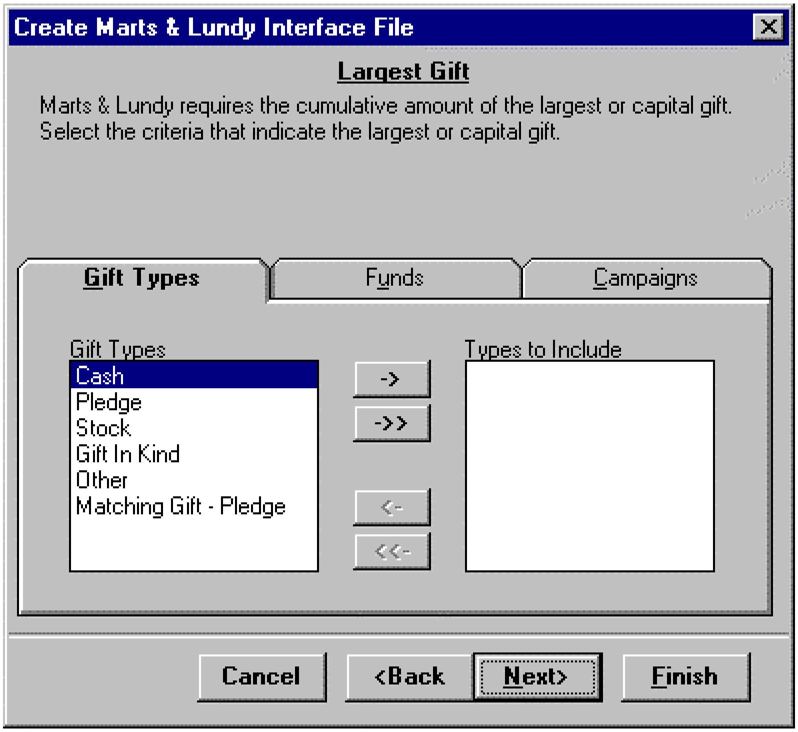
Next the Cumulative Gift – 2 Years Ago screen appears. This screen allows you to enter cumulative gift information for two years ago, which Marts & Lundy requires. Enter the start and end dates for the full year, two years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for two years ago.



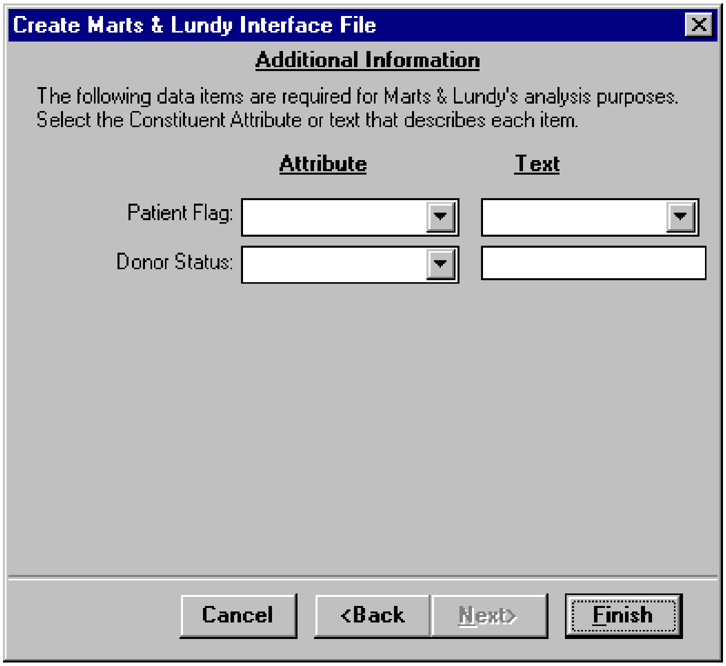
The Cumulative Gift – 3 Years Ago screen appears. This screen allows you to enter cumulative gift information for three years ago, which Marts & Lundy requires. Enter the start and end dates for the full year, three years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for three years ago.



Then the Largest Gift screen appears. This screen allows you to enter information about the largest gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.



The Additional Information screen appears. On this screen you must select certain attribute or text information for data item(s) which Marts & Lundy requires for analysis.

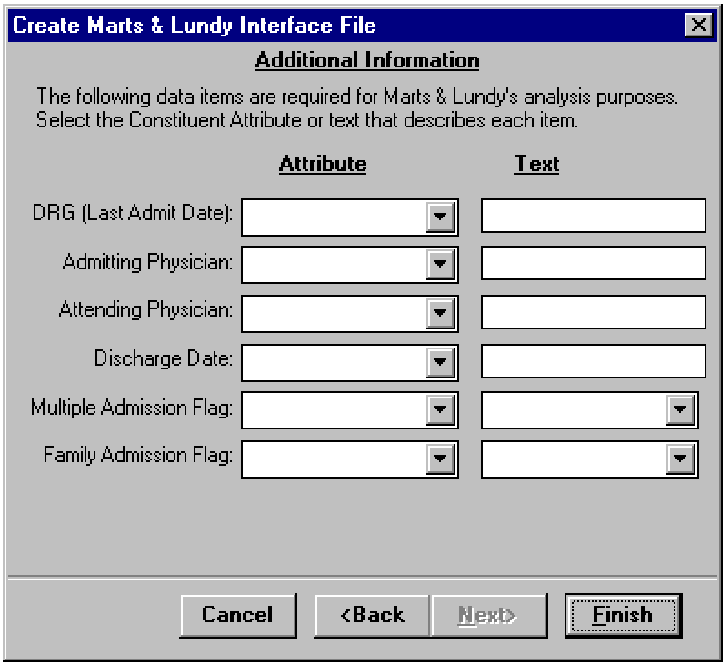


The next screen to appear is the Enter Interface File Name screen shown in Step 17 above. The remaining screens are the same as in the detailed procedure.

Hospital Patient

The **Hospital Patient** file layout has a series of screens that varies from the ones detailed in the procedure above, which used the **Education** file layout.

After selecting **Hospital Patient** for the file layout, the Additional Information screen appears. On this screen you must select certain attribute or text information for data item(s) which Marts & Lundy requires for analysis.



The next screen to appear is the Enter Interface File Name screen shown in Step 17 above. The remaining screens are the same as in the detailed procedure.

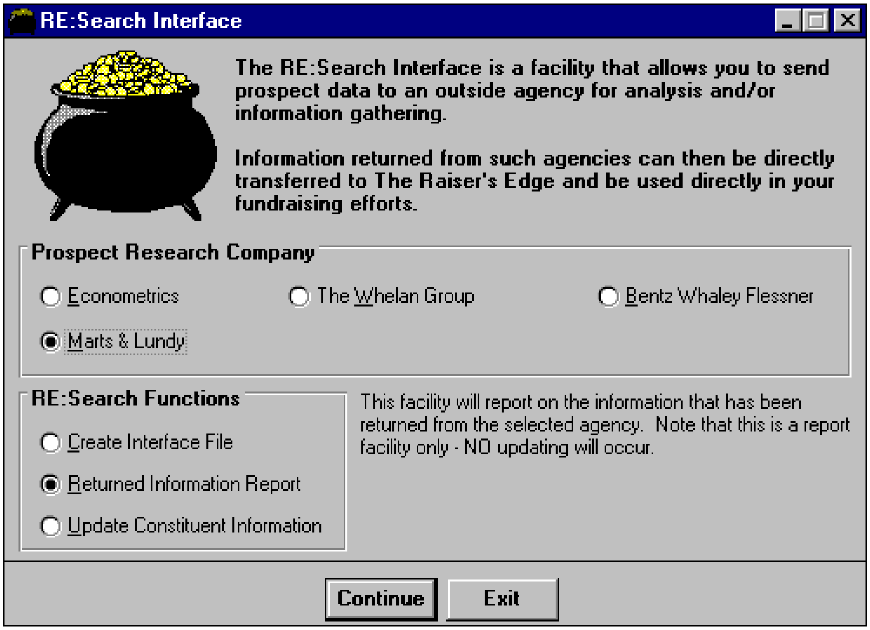
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

➤ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Marts & Lundy** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

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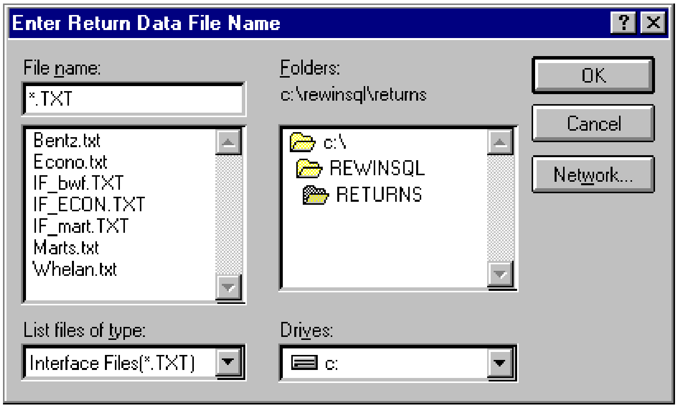
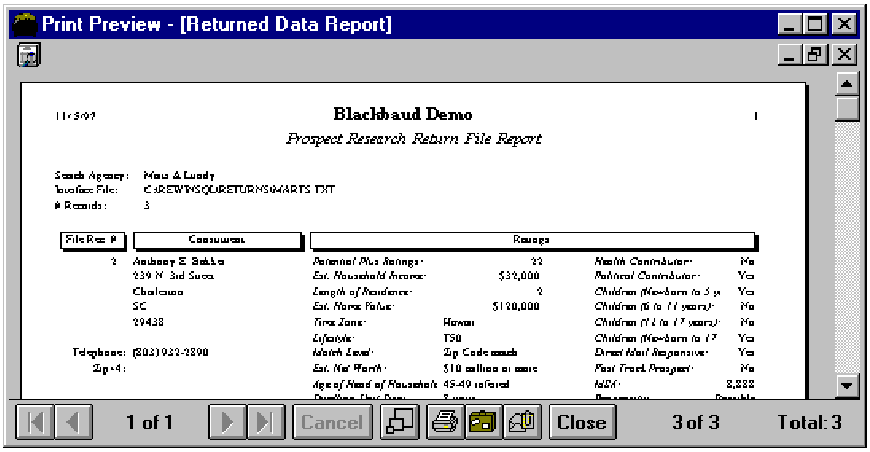
3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



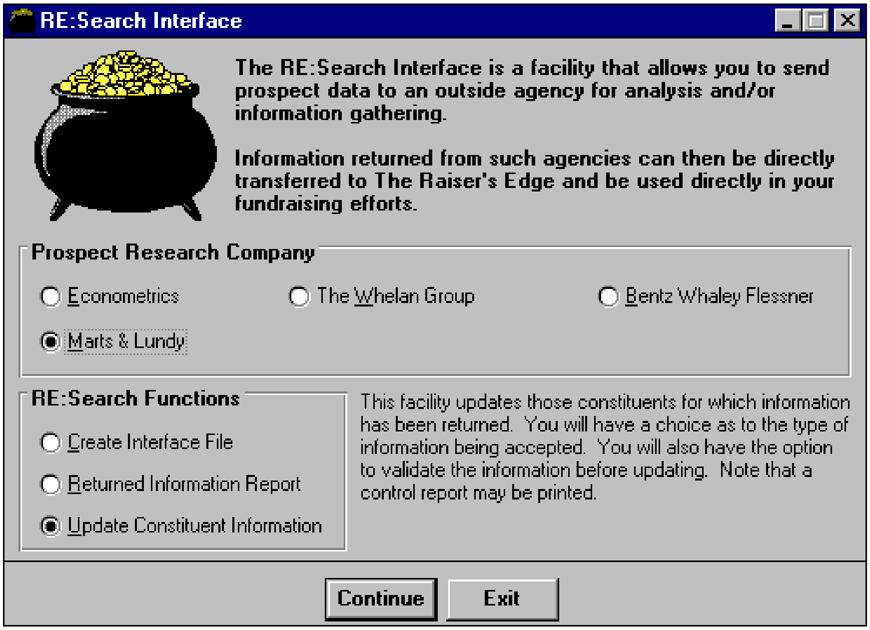
Use the standard buttons to navigate and perform specific tasks.

Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via the constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

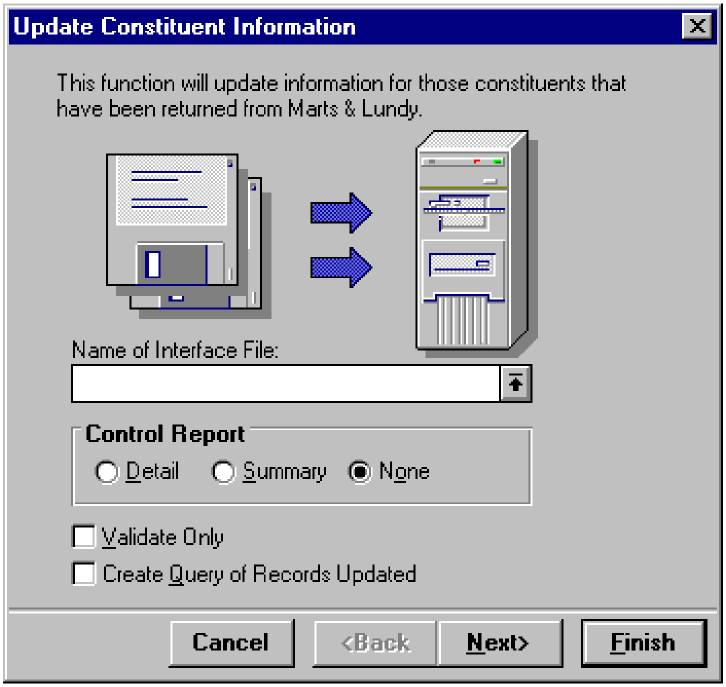
➢ **To update your constituent information:**

1. Start the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Marts & Lundy** radio button for the Prospect Research Company and select the **Update Constituent Information** radio button for the RE:Search Functions.

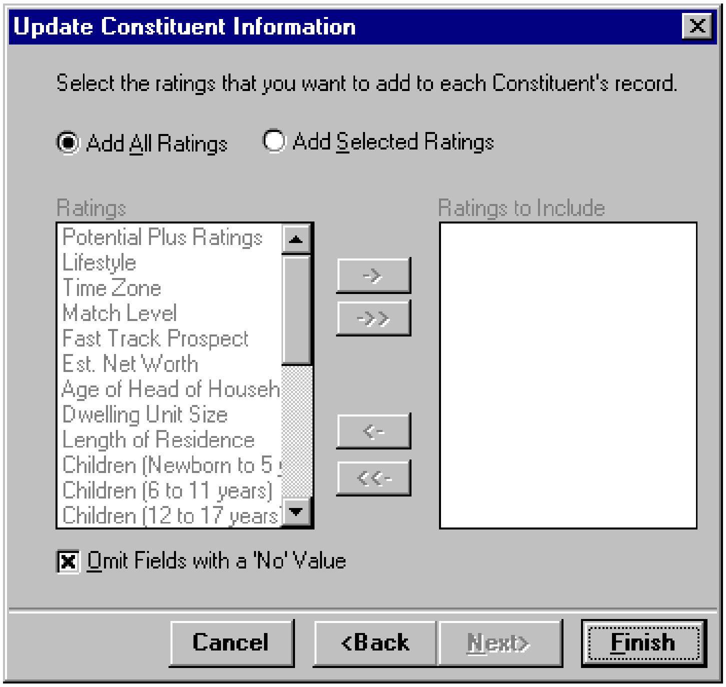
3. Click **Continue**. The following screen appears.



4. Enter the path (location) and name of the interface file that you received from Marts & Lundy or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

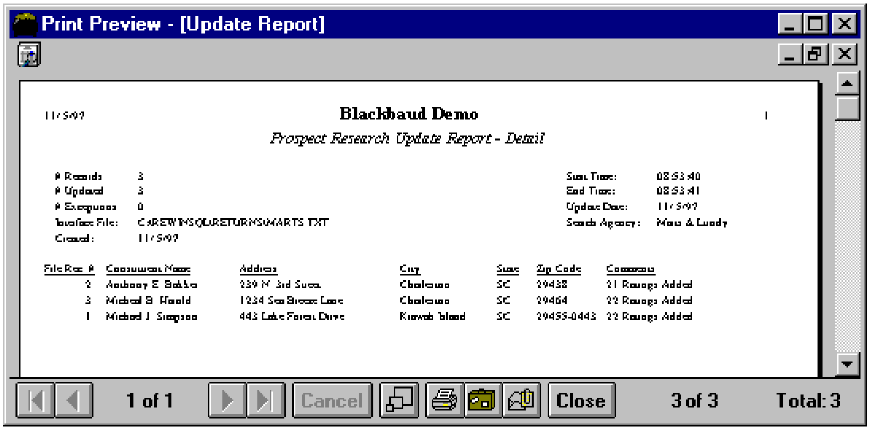
5. You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

6. Click **Next.** The following screen appears.



7. From this screen you can select to add all of the ratings that have been returned to you from Marts & Lundy or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a 'No' Value** by marking the checkbox. This means any returned ratings with a 'No' value will not be added to the constituent's rating information upon update. For example, if a prospect constituent receives a 'No' rating from Marts & Lundy based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

8. Click **Finish**. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report, in either detail or summary form, may appear.



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CHAPTER 5

Working with The Whelan Group

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The Whelan Group Requirements

The Whelan Group requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

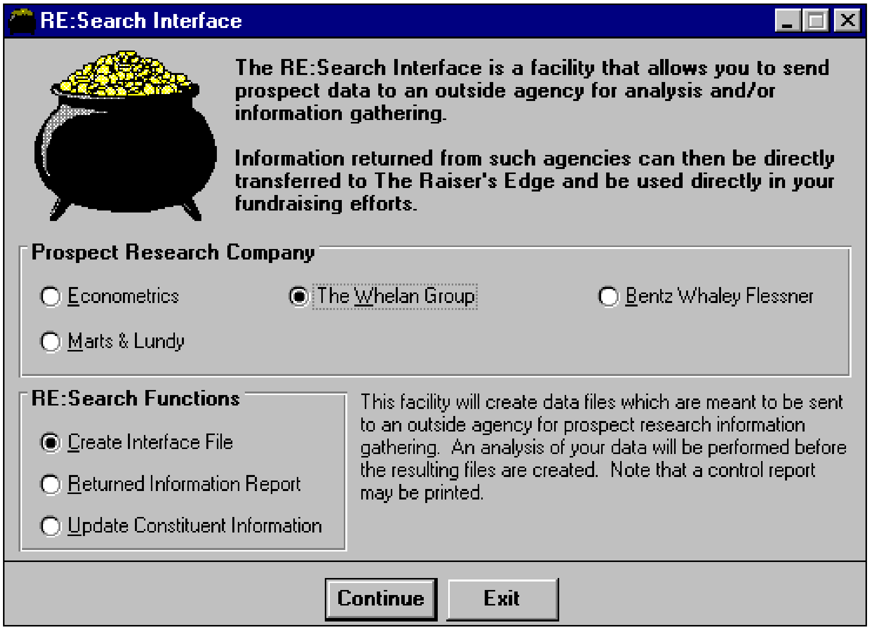
Creating the Interface File

For The Whelan Group to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the Interface. This file can be placed on diskette(s) that you send to The Whelan Group. The Whelan Group reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there will be a Wizard that will prompt you for the appropriate parameters. These parameters will be saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

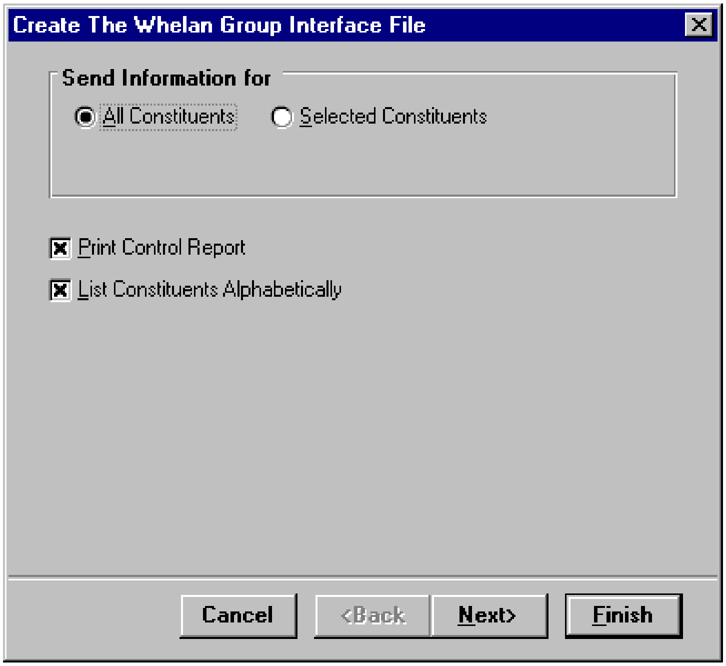
➢ To create a Whelan Group interface file:

1. Start the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select **The Whelan Group** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create Whelan Group Interface File screen appears.

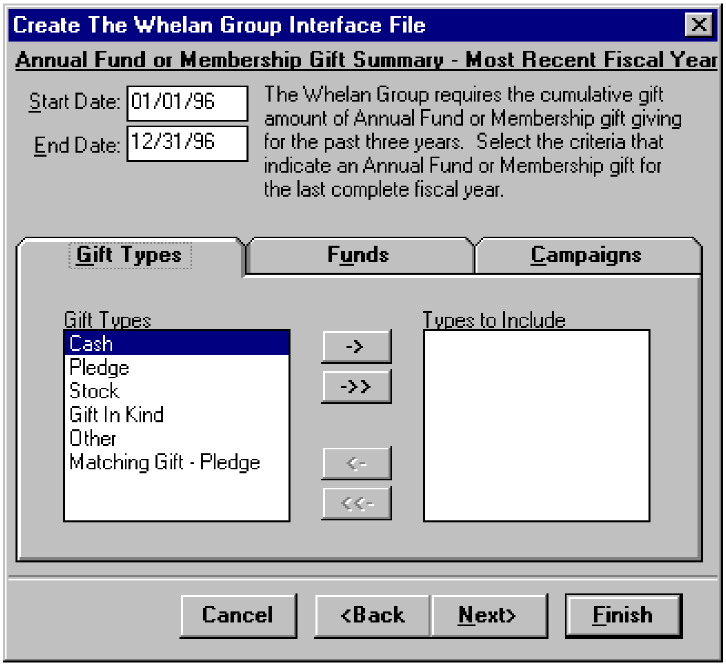


4. Select either the **All Constituents** or **Selected Constituents** radio button, depending on which you want your data file for The Whelan Group to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click to select from a list of available queries.

5. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to The Whelan Group.

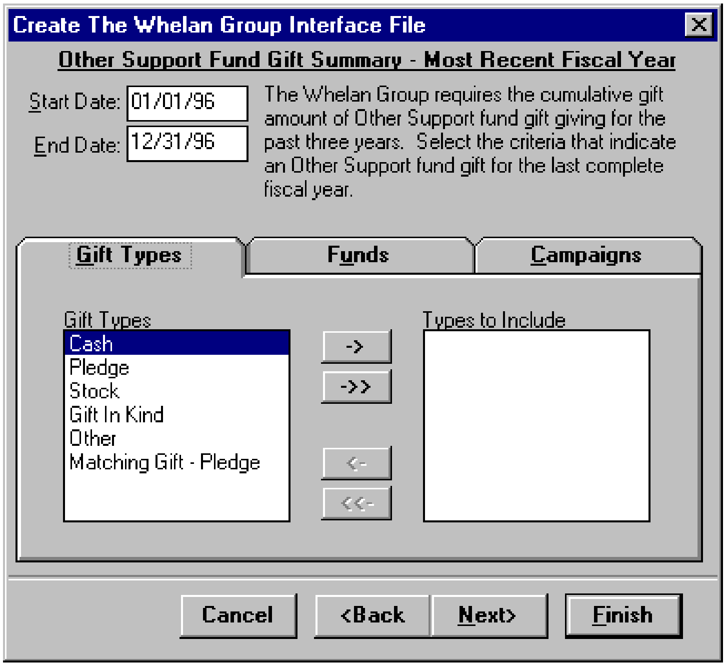
6. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

7. Click **Next** to continue. The following screen appears.



8. This screen allows you to enter annual fund or membership gift summary information for the most recent fiscal year, which The Whelan Group requires. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the annual fund or membership gift amount for the most recent, complete fiscal year.

9. Click **Next**. The following screen appears.



10. This screen allows you to enter other support fund gift summary information for the most recent fiscal year, which The Whelan Group requires. Enter the start and end dates for the most recent, full fiscal year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other support fund gift summary amount for the most recent, complete fiscal year.

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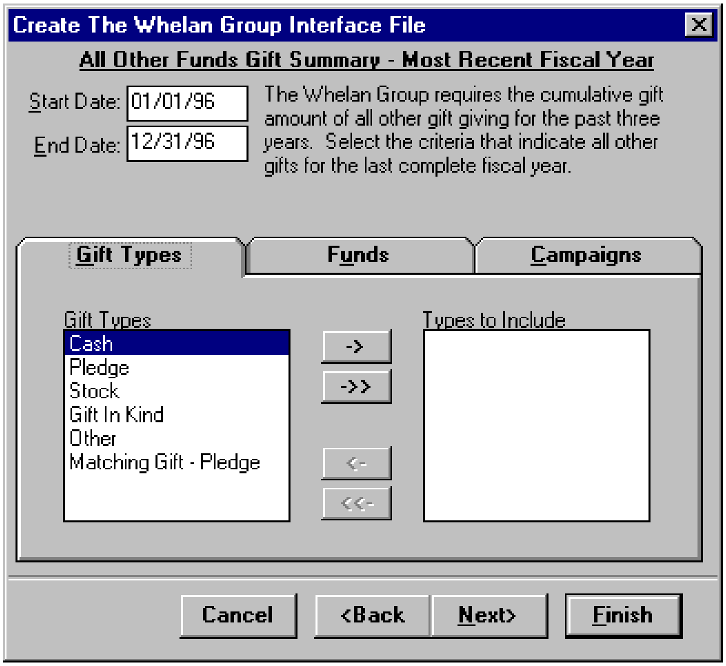
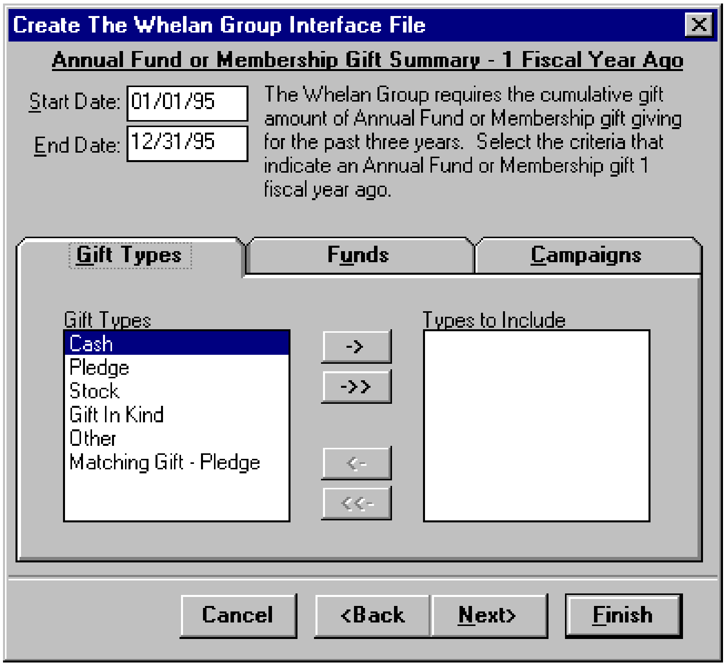
11. Click **Next**. The following screen appears.



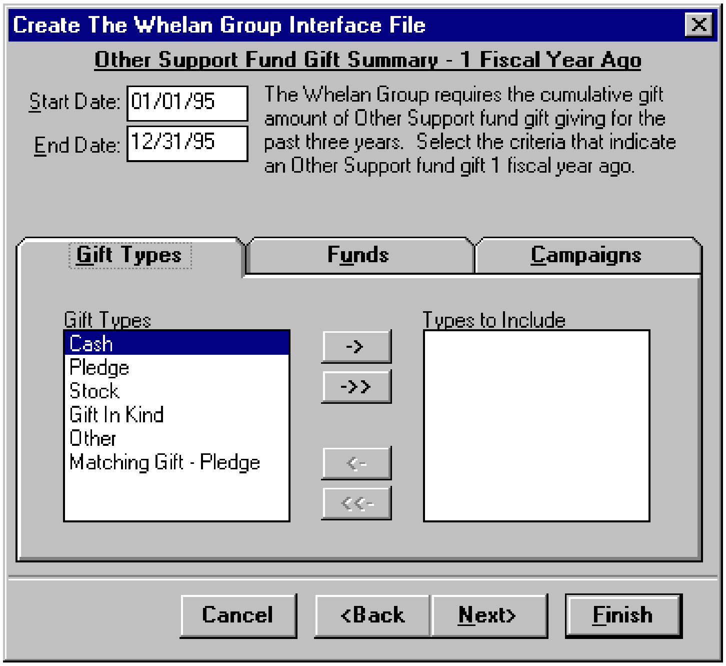
12. This screen allows you to enter all other funds gift summary information for the most recent fiscal year, which The Whelan Group requires. Enter the start and end dates for the most recent, full fiscal year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other fund gift summary amount for the most recent, complete fiscal year.

13. Click **Next**. The following screen appears.



14. This screen allows you to enter annual fund or membership gift summary information for one fiscal year ago, which The Whelan Group requires. Enter the start and end dates for one fiscal year ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the annual fund or membership gift amount for one fiscal year ago.

15. Click **Next**. The following screen appears.



16. This screen allows you to enter other support fund gift summary information for one fiscal year ago, which The Whelan Group requires. Enter the start and end dates for one fiscal year ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other support fund gift summary amount for one fiscal year ago.

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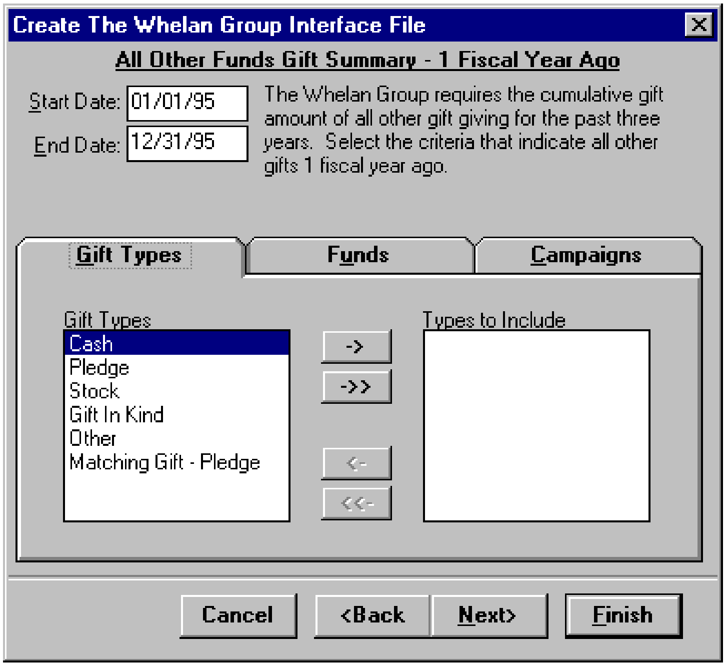
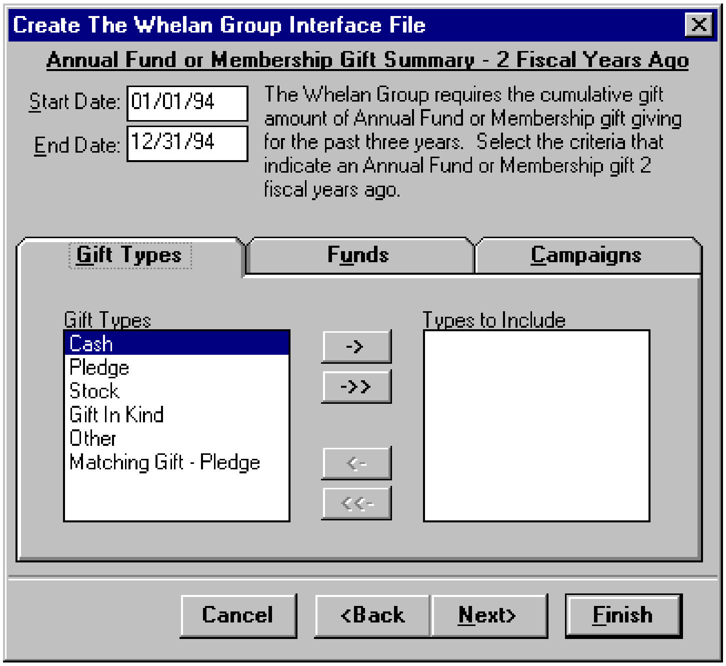
17. Click **Next**. The following screen appears.



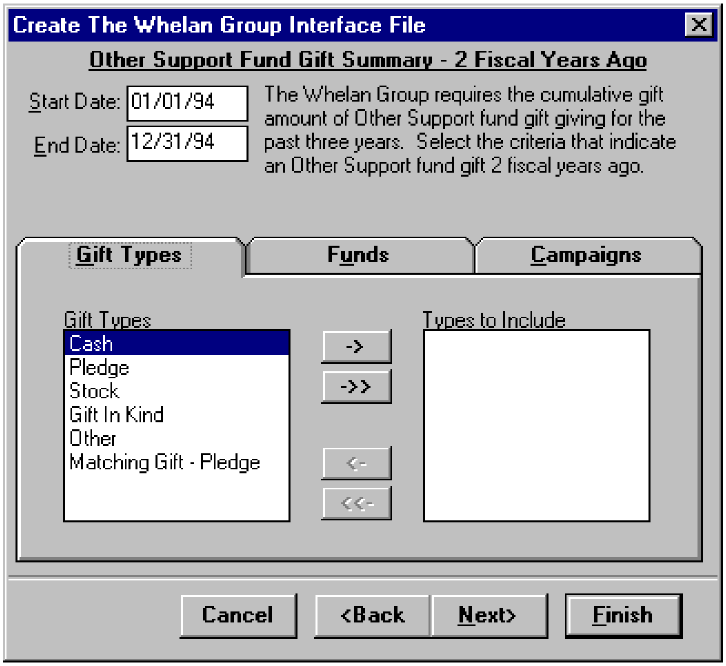
18. This screen allows you to enter all other funds gift summary information for one fiscal year ago, which The Whelan Group requires. Enter the start and end dates for one fiscal year ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other fund gift summary amount for one fiscal year ago.

19. Click **Next**. The following screen appears.



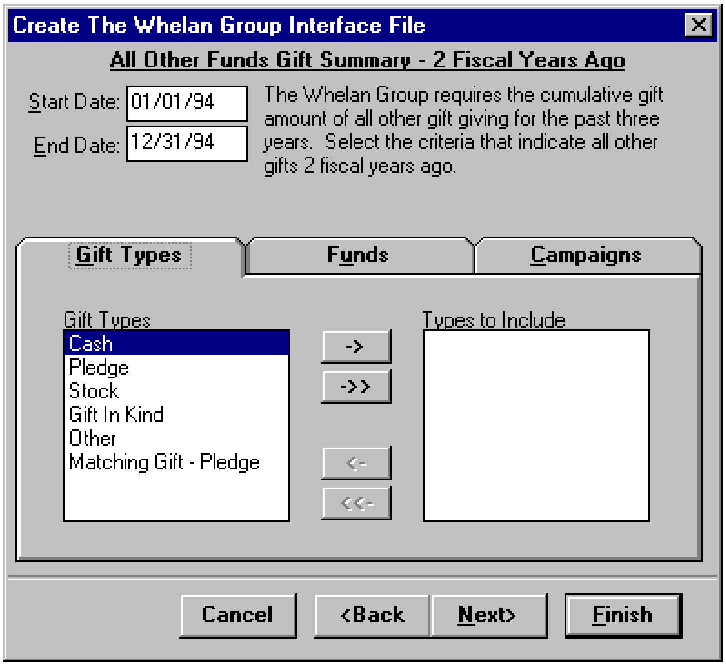
20. This screen allows you to enter annual fund or membership gift summary information for the year, two fiscal years ago, which The Whelan Group requires. Enter the start and end dates for the year, two fiscal years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the annual fund or membership gift amount for the year, two fiscal years ago.

21. Click **Next**. The following screen appears.



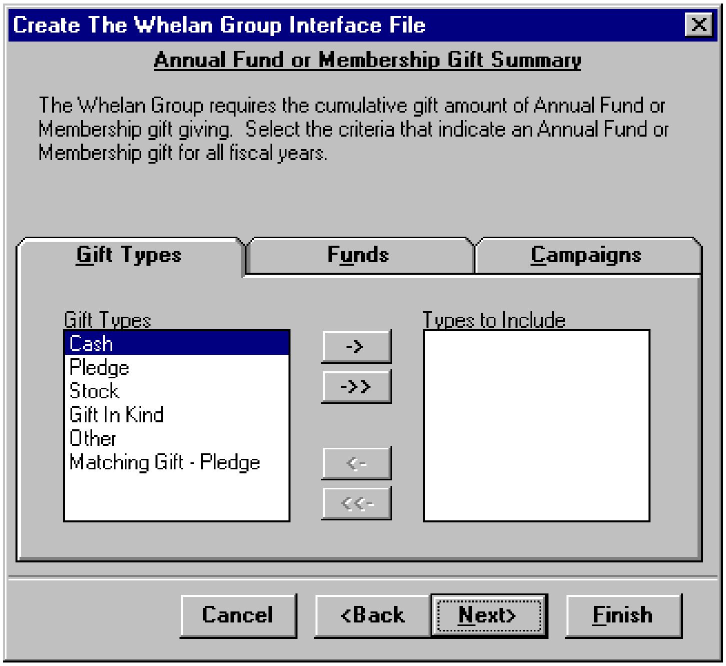
22. This screen allows you to enter other support fund gift summary information for the fiscal year, two fiscal years ago, which The Whelan Group requires. Enter the start and end dates for the fiscal year, two fiscal years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other support fund gift summary amount for the fiscal year, two fiscal years ago.

23. Click **Next**. The following screen appears.



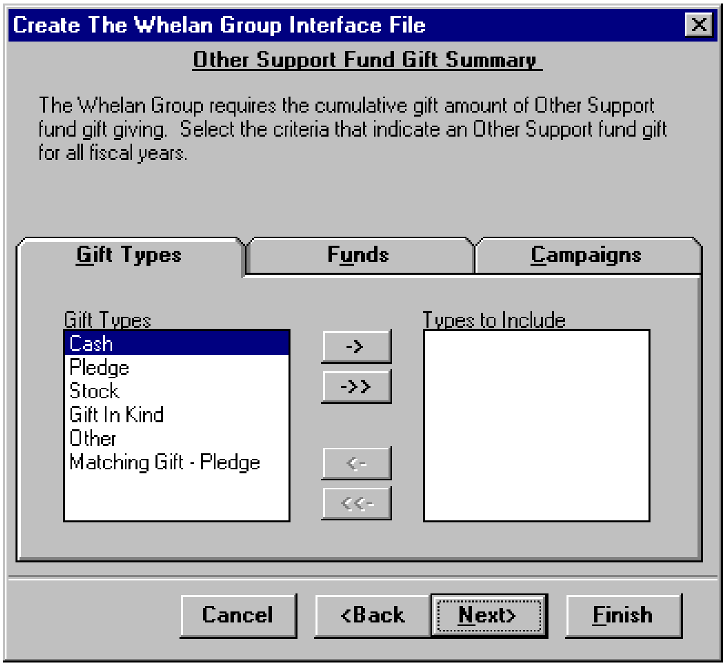
24. This screen allows you to enter all other funds gift summary information for the fiscal year, two fiscal years ago, which The Whelan Group requires. Enter the start and end dates for the fiscal year, two fiscal years ago. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the other fund gift summary amount for the fiscal year, two fiscal years ago.

25. Click **Next**. The following screen appears.



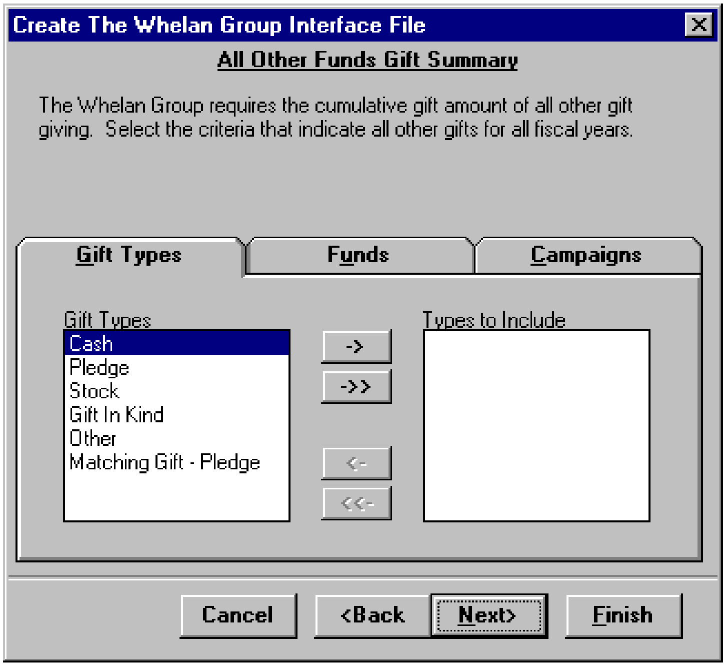
26. This screen allows you to enter all annual fund and membership gift summary information. The system will compile this information regardless of the date of the gifts/records. Click on the series of tabs to select the gift types, funds, or campaigns to include in the total annual fund and membership gift summary amount.

27. Click **Next**. The following screen appears.



28. This screen allows you to enter all other support fund gift summary information. The system will compile this information regardless of the date of the gifts/records. Click on the series of tabs to select the gift types, funds, or campaigns to include in the total other support fund gift summary amount.

29. Click **Next**. The following screen appears.



30. This screen allows you to enter all other funds gift summary information. The system will compile this information regardless of the date of the gifts/records. Click on the series of tabs to select the gift types, funds, or campaigns to include in the total other funds gift summary amount.

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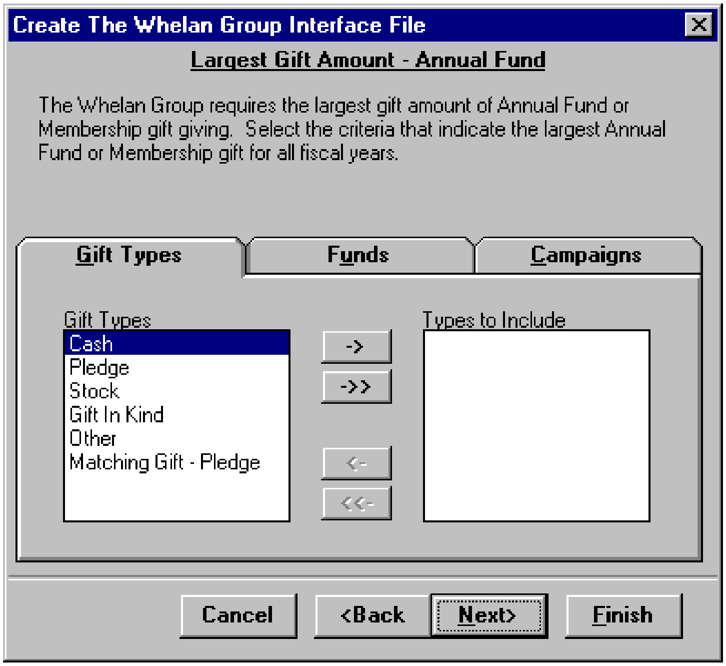
31. Click **Next**. The following screen appears.



32. This screen allows you to enter largest gift amount of annual fund or membership gift giving information. The system will compile this information regardless of the date of the gifts/records. Click on the series of tabs to select the gift types, funds, or campaigns to include in the largest gift amount.

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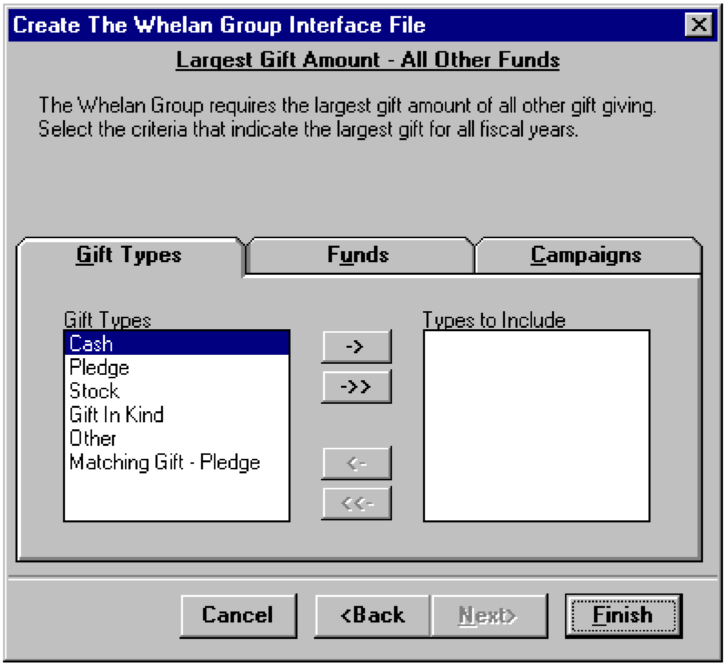
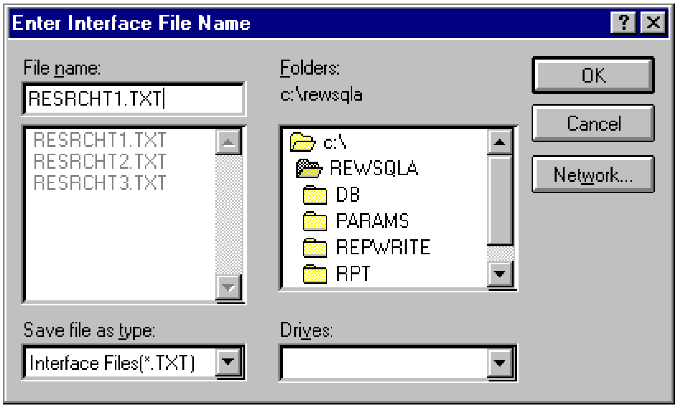
33. Click **Next**. The following screen appears.



34. This screen allows you to enter largest gift amount of all other funds information. The system will compile this information regardless of the date of the gifts/records. Click on the series of tabs to select the gift types, funds, or campaigns to include in the largest gift amount.

35. Click **Finish**. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



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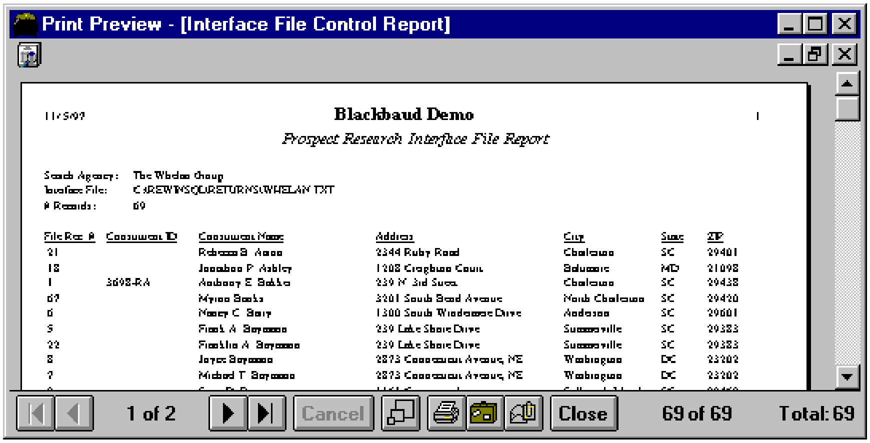
36. Click **OK** when you've entered the appropriate file name and path (location). A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

    Otherwise, a report of the records included in the interface file appears on the screen.



From this report window, you can use the standard buttons to navigate and perform specific tasks.

- Go to the first page of the report.
- Go back one page.
- Go forward one page.
- Go to the last page of the report.
- Zoom the report to make it larger or smaller.
- Print a hard copy to the printer set as the default in Windows.
- Export the report to a file.
- Send the report to another user via e-mail.

You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

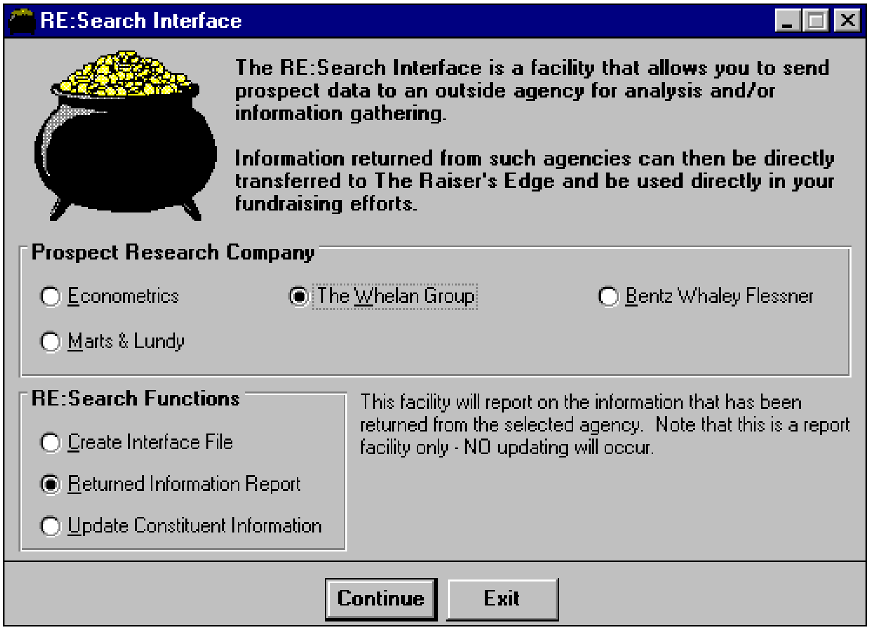
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

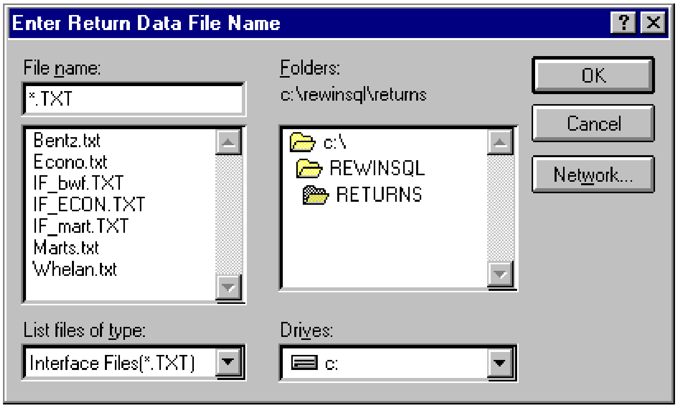
➢ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.

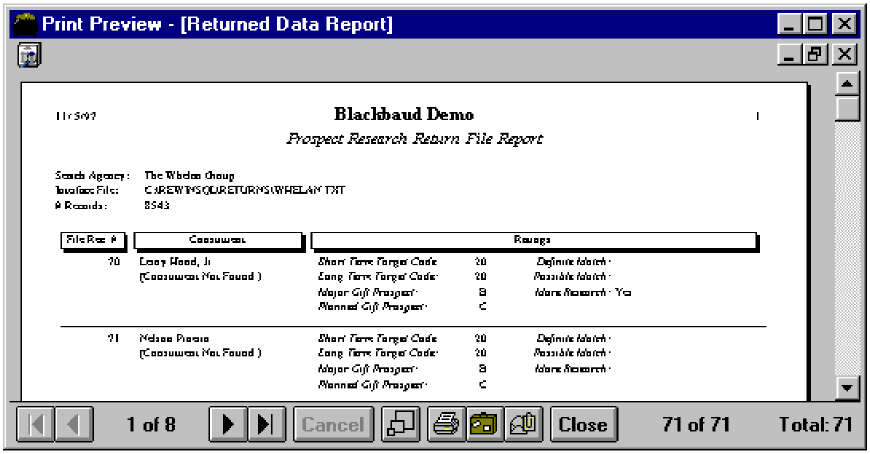


2. Select **The Whelan Group** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



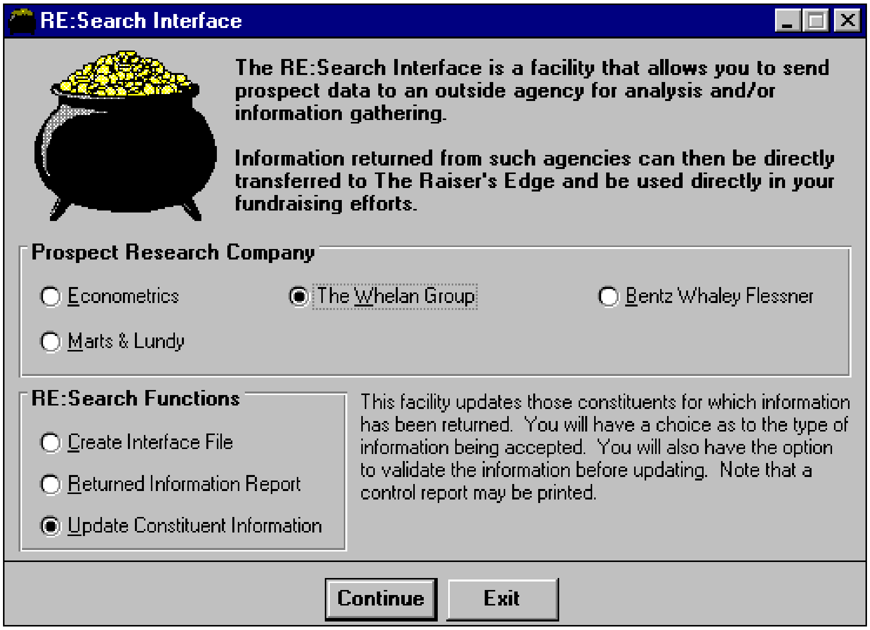
Use the standard buttons to navigate and perform specific tasks.

Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

➢ **To update your constituent information:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select **The Whelan Group** radio button for the Prospect Research Company and select the **Update Constituent Information** radio button for the RE:Search Functions.

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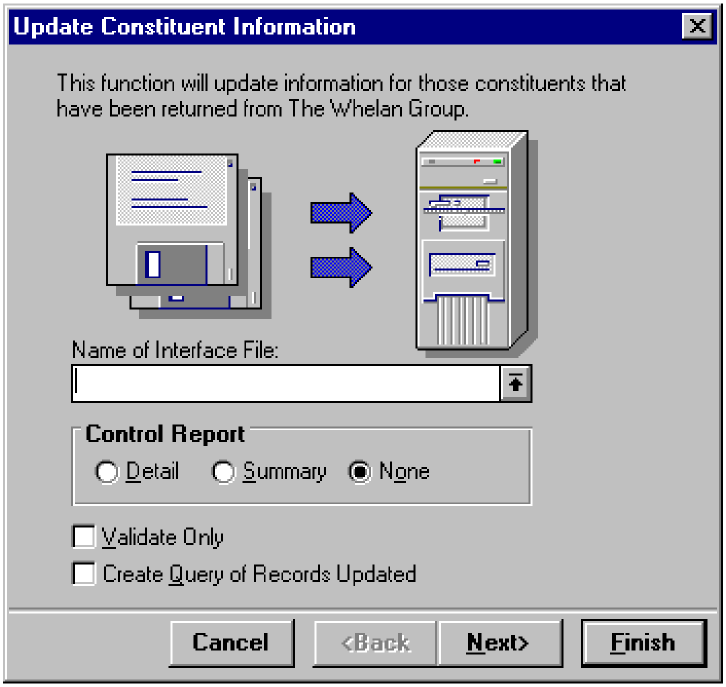
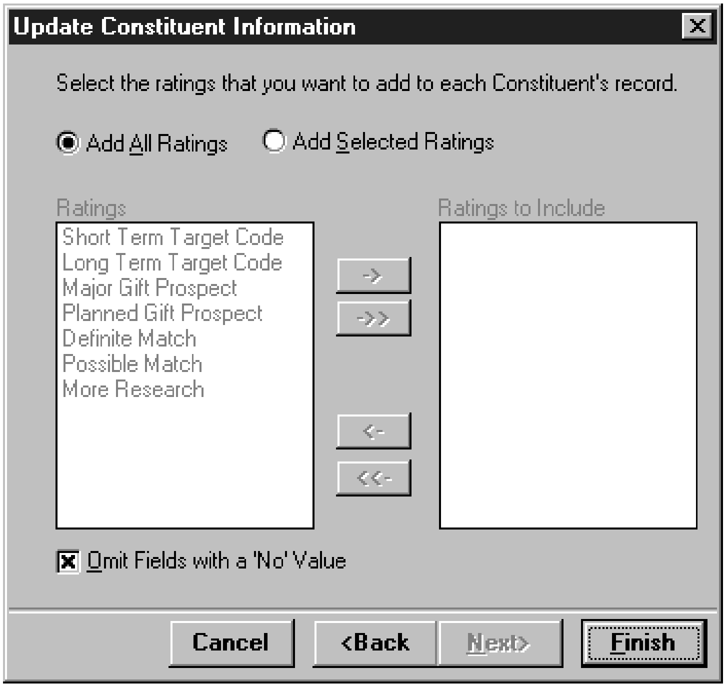
3. Click **Continue**. The following screen appears.



4. Enter the path (location) and name of the interface file that you received from The Whelan Group or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

5. You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

6. Click **Next**. The following screen appears.



From this screen you can select to add all of the ratings that have been returned to you from The Whelan Group or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a 'No' Value** by marking the checkbox. This means any returned ratings with a 'No' value will not be added to the constituent's rating information upon update. For example, if a prospect constituent receives a 'No' rating from The Whelan Group based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

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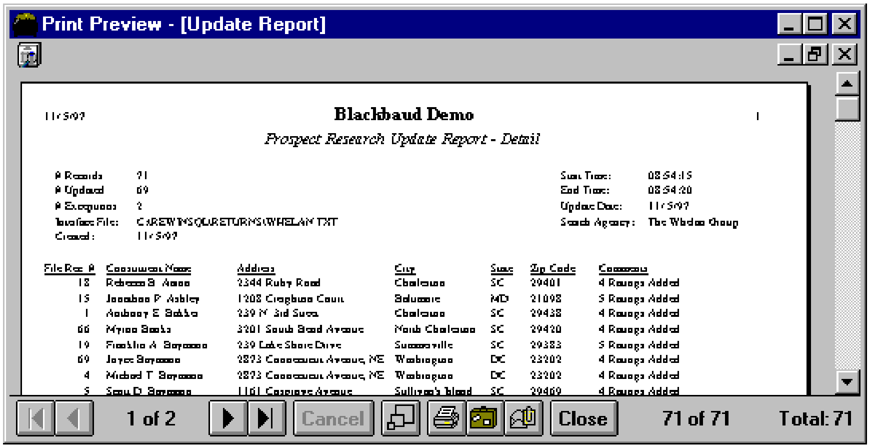
7. Click **Finish**. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report may appear.



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C H A P T E R 6

Working with Bentz Whaley Flessner

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Bentz Whaley Flessner Requirements

Bentz Whaley Flessner requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

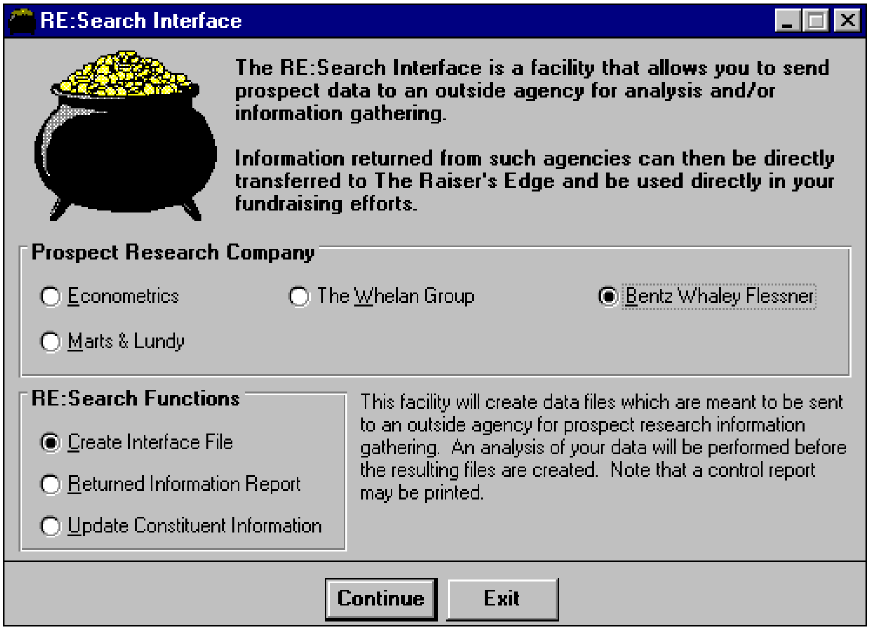
Creating the Interface File

For Bentz Whaley Flessner to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the file. You can select constituents to include in this file by using a existing query or by selecting all constituents. This file can be placed on diskette(s) that you send to Bentz Whaley Flessner. Bentz Whaley Flessner reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there will be a Wizard that will prompt you for the appropriate parameters. These parameters will be saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

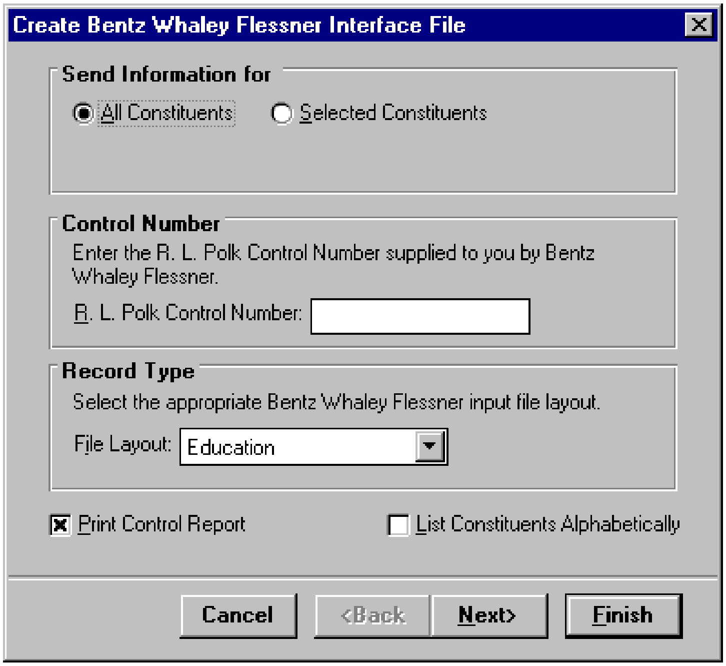
➢ **To create a Bentz Whaley Flessner interface file:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Bentz Whaley Flessner** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create Bentz Whaley Flessner Interface File screen appears.



4. Select either the **All Constituents** or **Selected Constituents** radio button, depending on which you want your data file for Bentz Whaley Flessner to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click on [button] to select from a list of available queries.

5. Enter the R. L. Polk **Control Number** supplied to you by Bentz Whaley Flessner.

6. Select the appropriate record type for the input file layout; Bentz Whaley Flessner should provide the correct layout type.

Note: The file layout selected will affect the series of screens to follow. Please see the section Alternate Screens after this procedure for other possible screens that may appear depending upon the file layout you select. This procedure follows the Education file layout.

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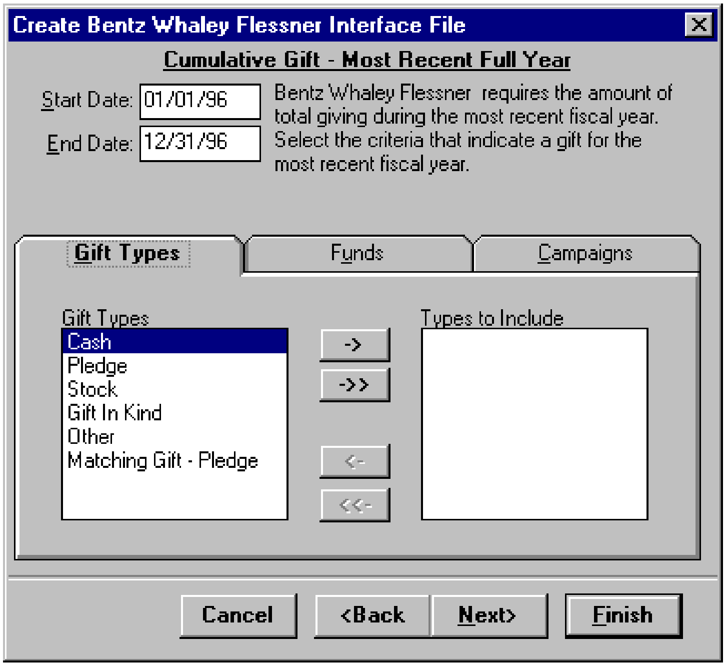
7. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to Bentz Whaley Flessner.

8. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

9. Click **Next** to continue. The following screen appears.



This screen allows you to enter cumulative gift information for the most recent full year. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent, complete fiscal year.

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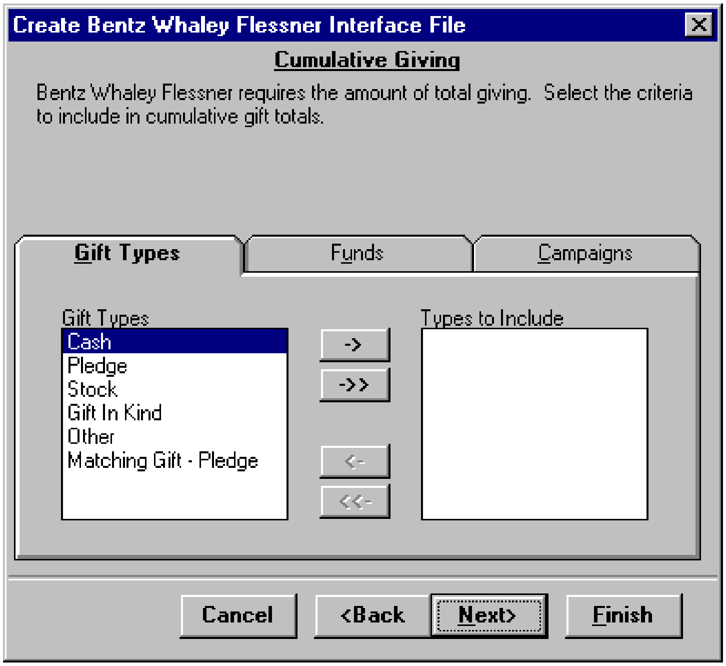
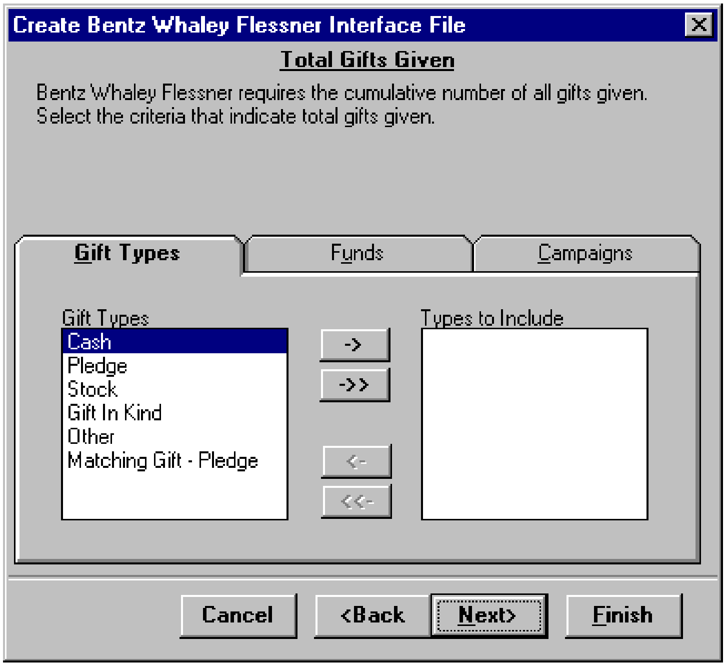
10. Click **Next**. The following screen appears.



This screen allows you to enter total giving amount information. Click on the series of tabs to select the gift types, funds, or campaigns to include in the total giving amount.

11. Click **Next**. The following screen appears.



This screen allows you to enter total number of gifts given information. Click on the series of tabs to select the gift types, funds, or campaigns to include in the total number of gifts given.

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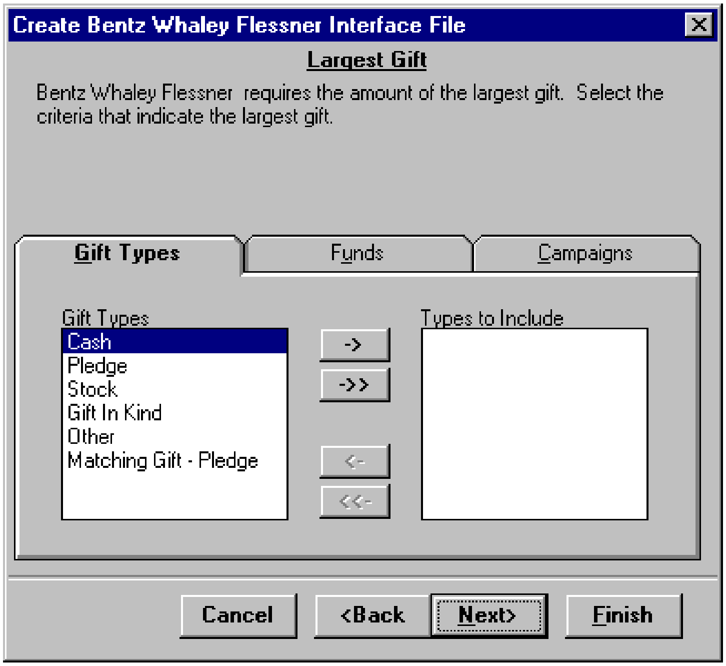
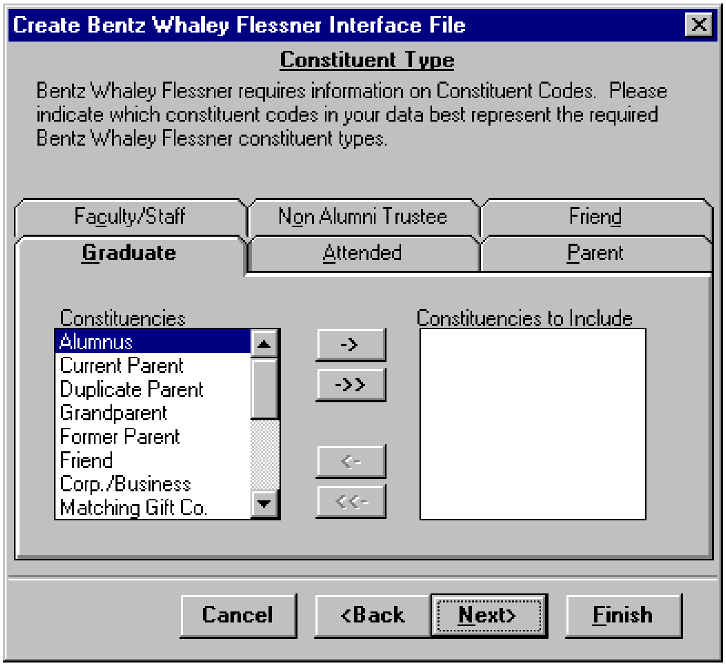
12. Click **Next**. The following screen appears.



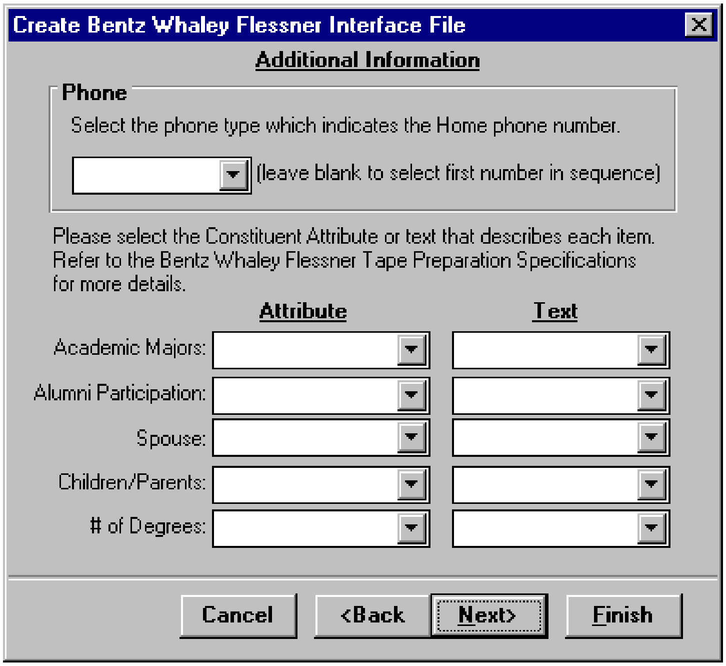
This screen allows you to enter largest gift information. Click on the series of tabs to select the gift types, funds, or campaigns to include in the largest gift amount.

13. Click **Next**. The following screen appears.



This screen allows you to enter information on constituent codes. Click on the series of tabs to select the codes which best represent the required Bentz Whaley Flessner constituent types.

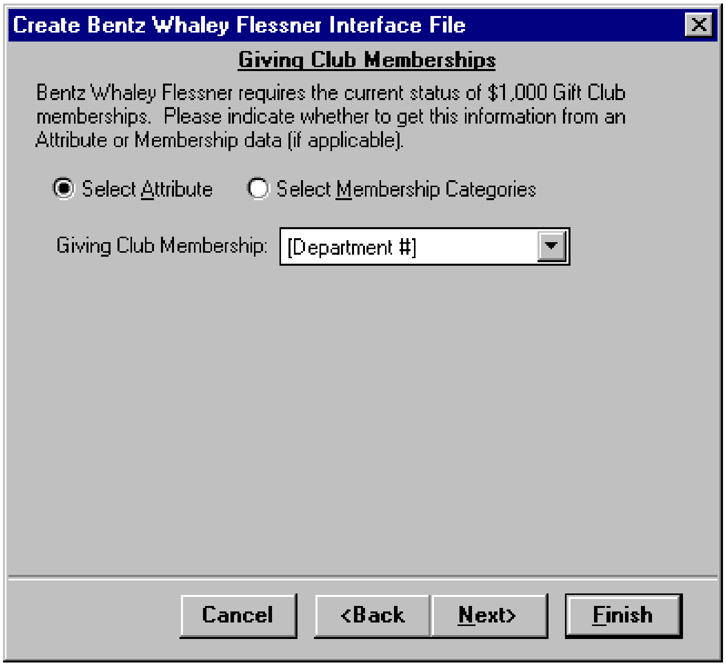
14. Click **Next**. The following screen appears.



This screen allows you to select additional optional information, including the phone number of your prospects. If the phone number is included, you can designate which number to use or the system will pick the first phone number listed for the prospect.

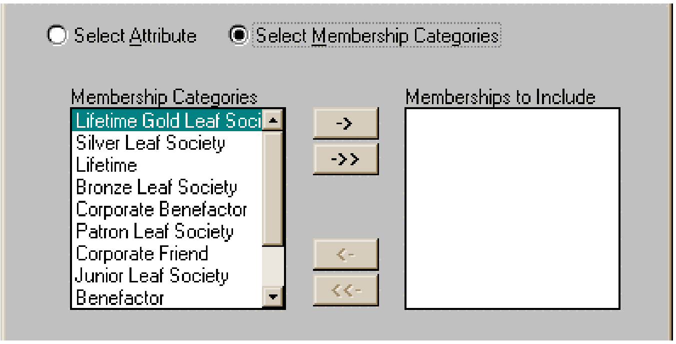
Select the attribute or text that describes each item listed.

15. Click **Next**. The following screen appears.

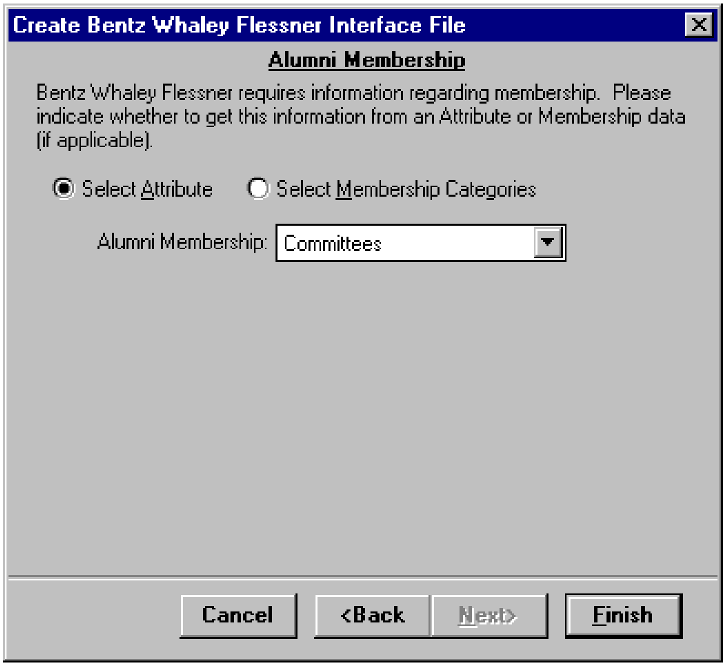


Mark the option to designate whether to get giving club membership information from selected attributes or from selected membership categories. If you mark the **Select Attribute** option, select the **Giving Club Membership** attribute from the drop-down list.

If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include** box.

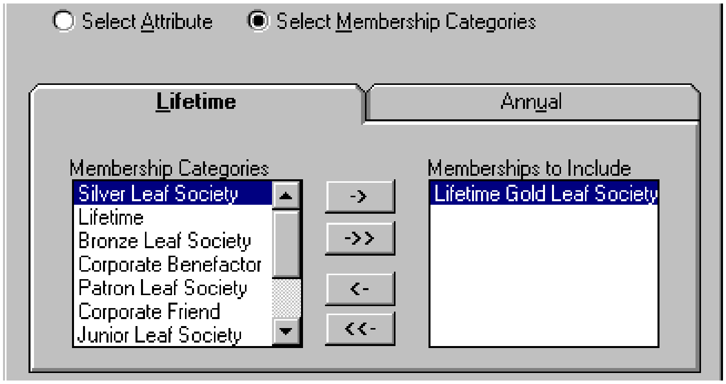


16. Click **Next**. The following screen appears.

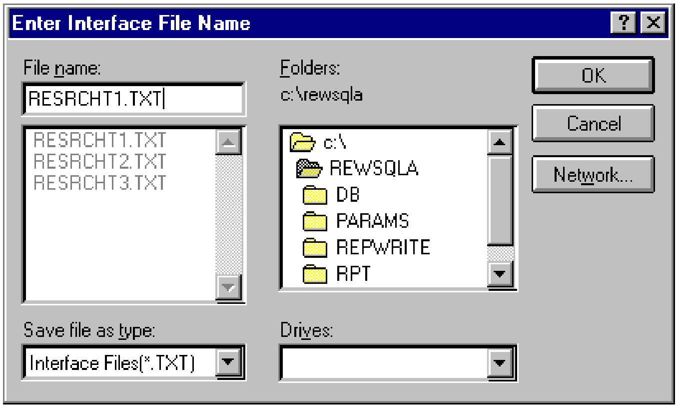


Mark the option to designate whether to get alumni membership information from selected attributes or from selected membership categories. If you mark the **Select Attribute** option, select the **Alumni Membership** attribute from the drop-down list.

If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include** box, on the Lifetime and Annual tabs.

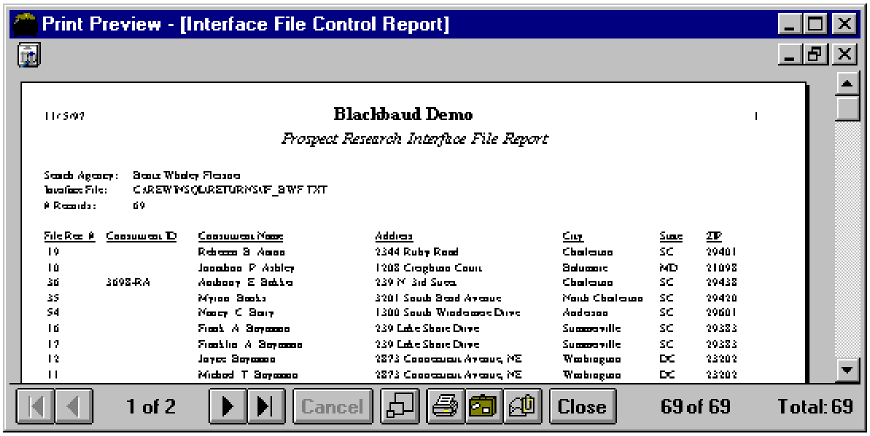


17. Click **Finish**. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



18. Click **OK** when you've entered the appropriate file name and path (location). A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

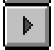
    Otherwise, a report of the records included in the interface file appears on the screen.

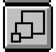
    From this report window, you can use the standard buttons to navigate and perform specific tasks.

     Go to the first page of the report.

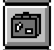
     Go back one page.

     Go forward one page.

     Go to the last page of the report.

     Zoom the report to make it larger or smaller.

     Print a hard copy to the printer set as the default in Windows.

     Export the report to a file.

     Send the report to another user via e-mail.

    You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

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Alternate Screens (according to file layout selected)

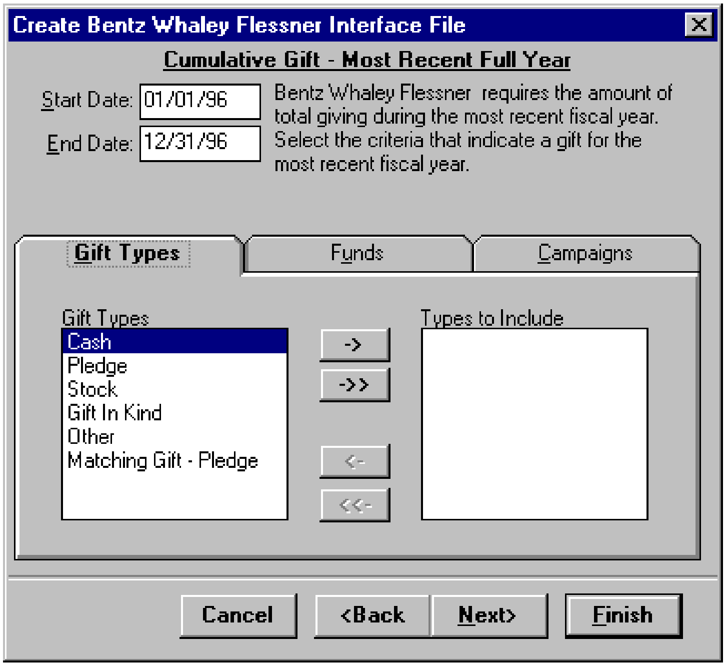
Education

The series of screens for this file layout are depicted in the procedure above.

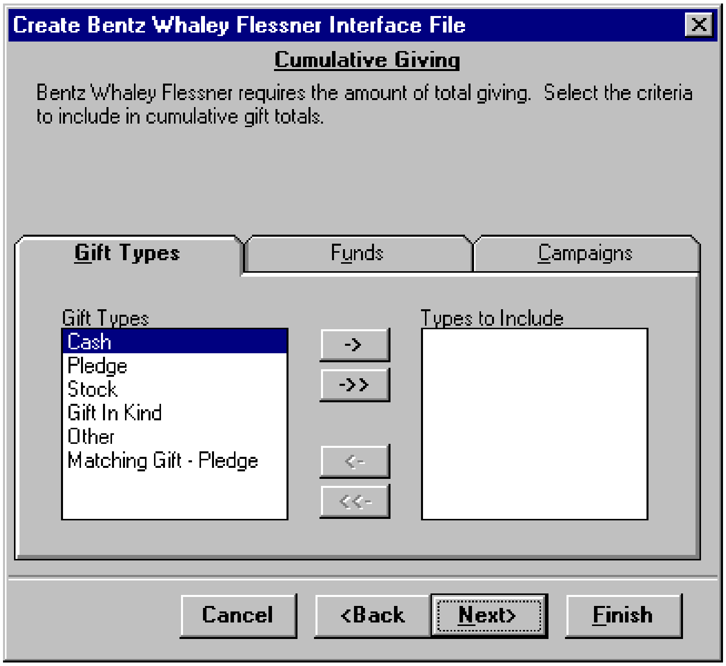
Organization

The **Organization** file layout has a series of screens that varies from the ones detailed in the procedure above, which used the **Education** file layout.

After selecting **Organization** for the file layout, the Cumulative Gift – Most Recent Full Year screen appears. This screen allows you to enter cumulative gift information for the most recent full year. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year.



Next the Cumulative Giving screen appears. This screen allows you to enter information about the amount of total giving. Click on the series of tabs to select the gift types, funds, or campaigns to include.



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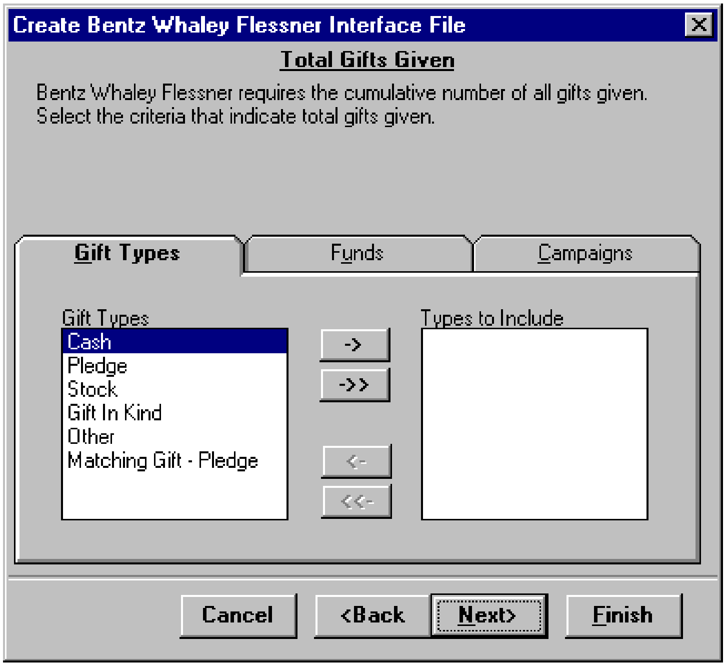
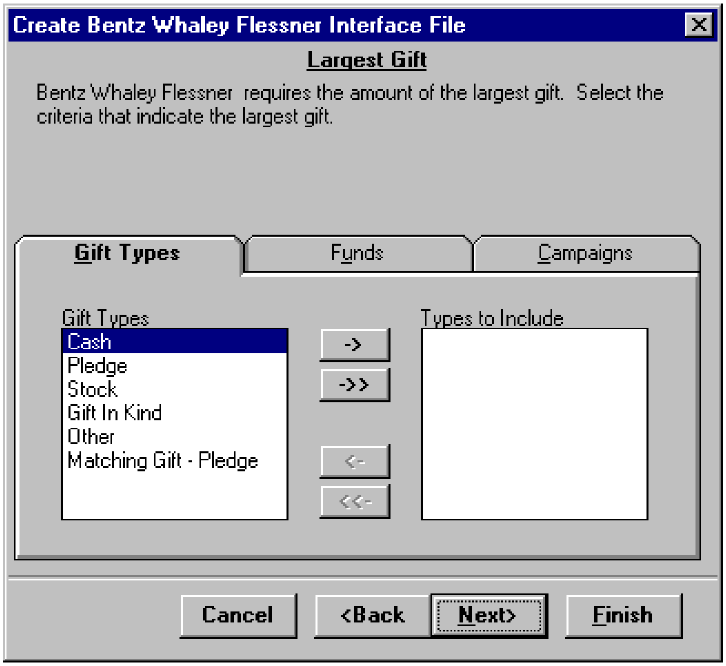
The Total Gifts Given screen appears. This screen allows you to enter information about the cumulative number of gifts given. Click on the series of tabs to select the gift types, funds, or campaigns to include.



Then the Largest Gift screen appears. This screen allows you to enter information about the amount of the largest gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.



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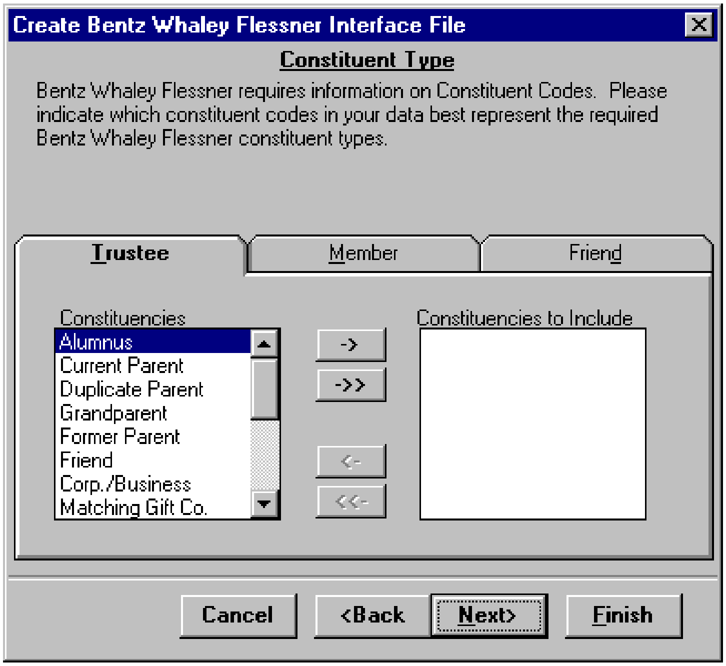
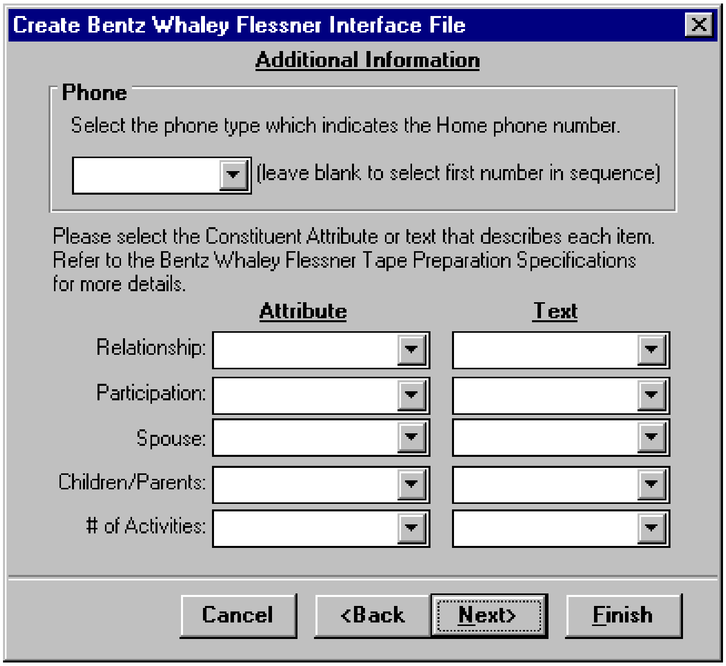
Then the Constituent Type screen appears. This screen allows you to enter information about constituent codes in your data and how they relate/represent Bentz Whaley Flessner constituent types. Click on the series of tabs to select the trustees, members, or friends to include.



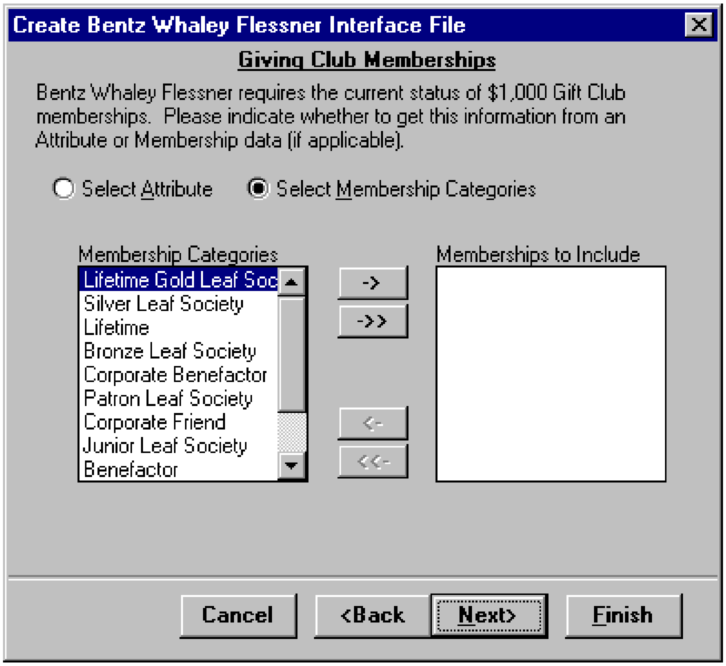
Then the Additional Information screen appears. On this screen you can select a phone type to indicate the home phone number. You must select certain attribute or text information for data item(s) which Bentz Whaley Flessner requires for analysis.



The Giving Club Memberships screen appears. Mark the option to designate whether to get membership information from selected attributes or from selected membership categories.

If you mark the **Select Attribute** option, select the attribute from the drop-down list.

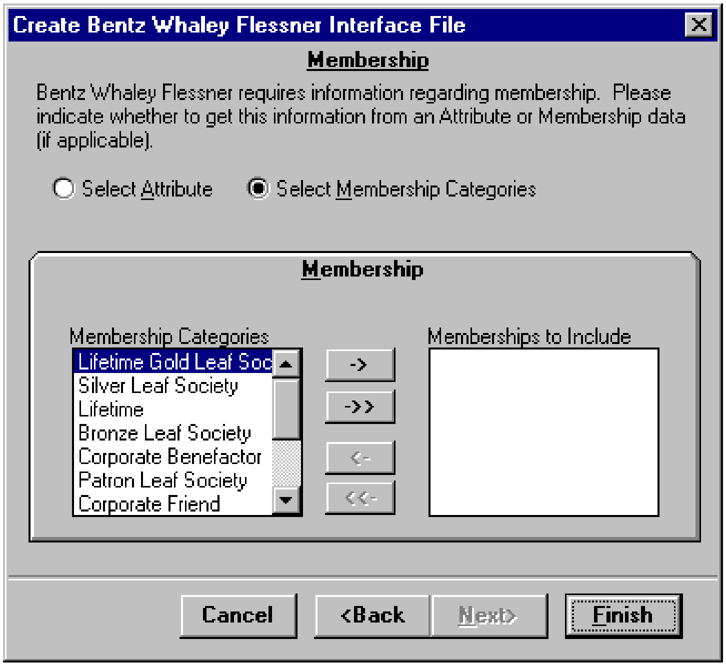
If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include**.



The Membership screen appears. Mark the option to designate whether to get membership information from selected attributes or from selected membership categories.

If you mark the **Select Attribute** option, select the attribute from the drop-down list.

If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include**.

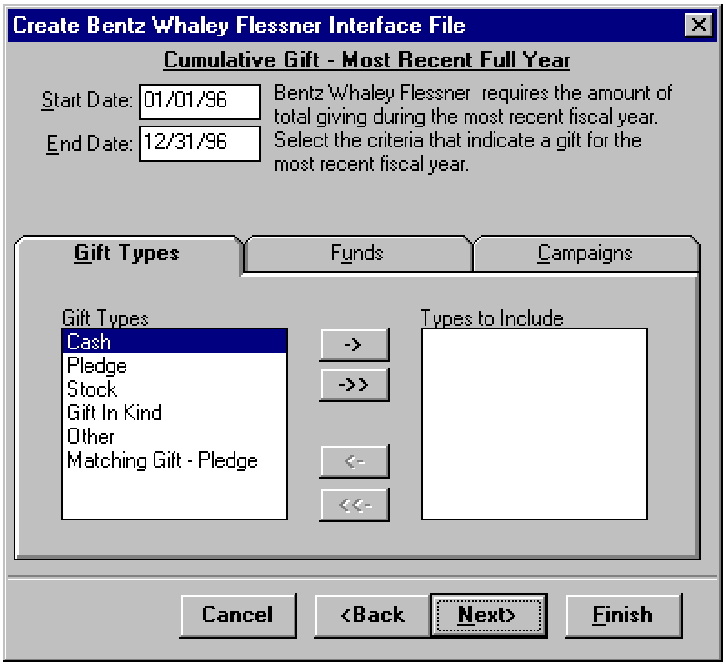


The next screen to appear is the Enter Interface File Name screen shown in Step 12 above. The remaining screens are the same as in the detailed procedure.

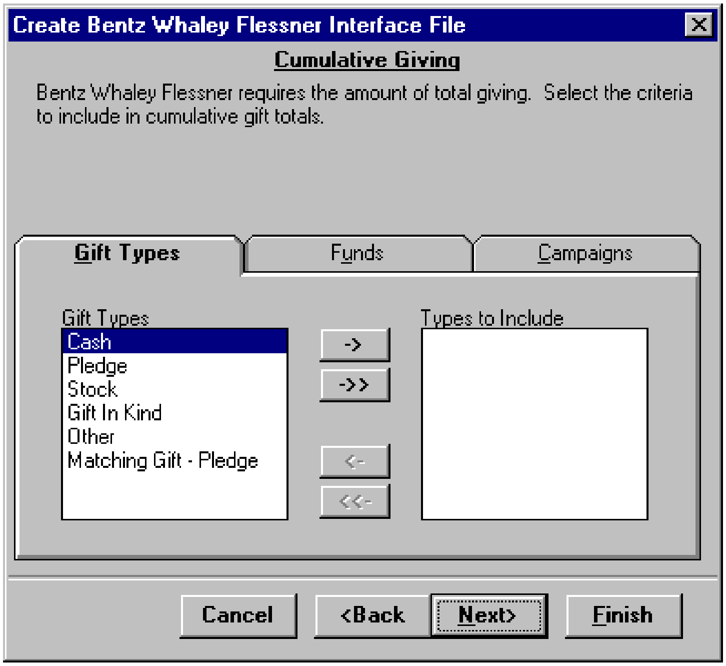
Health Care

The **Health Care** file layout has a series of screens that varies from the ones detailed in the procedure above, which used the **Education** file layout.

After selecting **Health Care** for the file layout, the Cumulative Gift – Most Recent Full Year screen appears. This screen allows you to enter cumulative gift information for the most recent full year. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year.



Next the Cumulative Giving screen appears. This screen allows you to enter information about the amount of total giving. Click on the series of tabs to select the gift types, funds, or campaigns to include.



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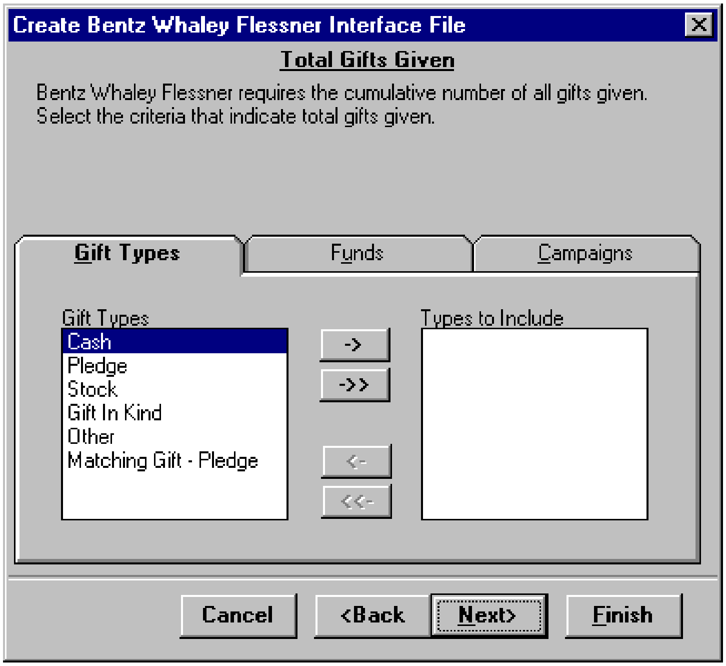
The Total Gifts Given screen appears. This screen allows you to enter information about the cumulative number of gifts given. Click on the series of tabs to select the gift types, funds, or campaigns to include.



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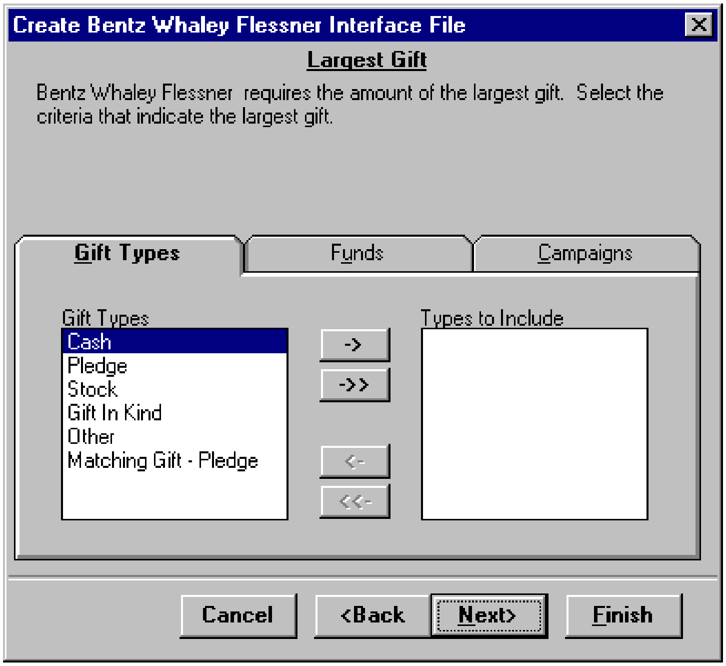
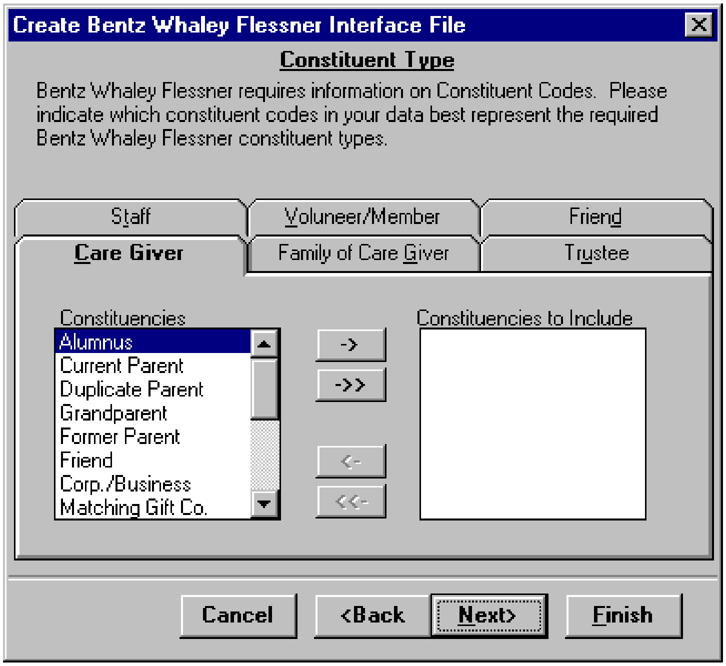
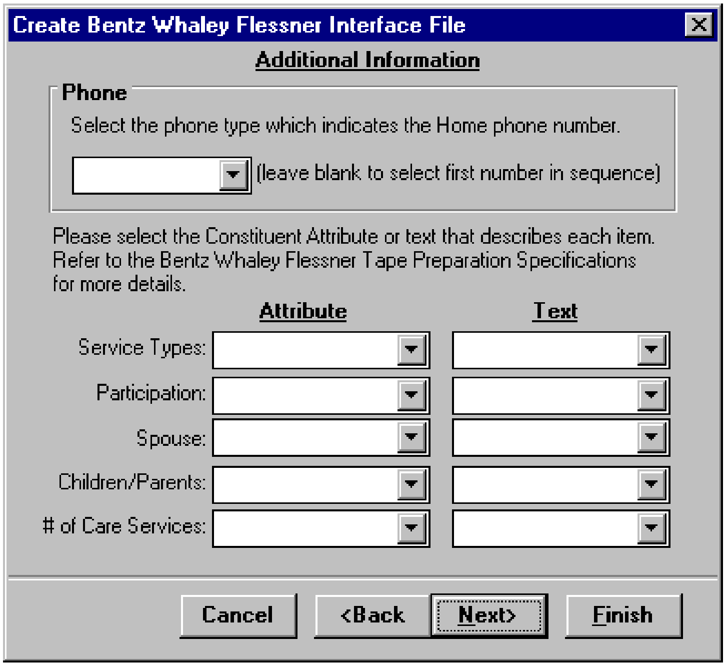
Then the Largest Gift screen appears. This screen allows you to enter information about the amount of the largest gift. Click on the series of tabs to select the gift types, funds, or campaigns to include.



Then the Constituent Type screen appears. This screen allows you to enter information about constituent codes in your data and how they relate/represent Bentz Whaley Flessner constituent types. Click on the series of tabs to select the trustees, members, or friends to include.



Then the Additional Information screen appears. On this screen you can select a phone type to indicate the home phone number. You must select certain attribute or text information for data item(s) which Bentz Whaley Flessner requires for analysis.



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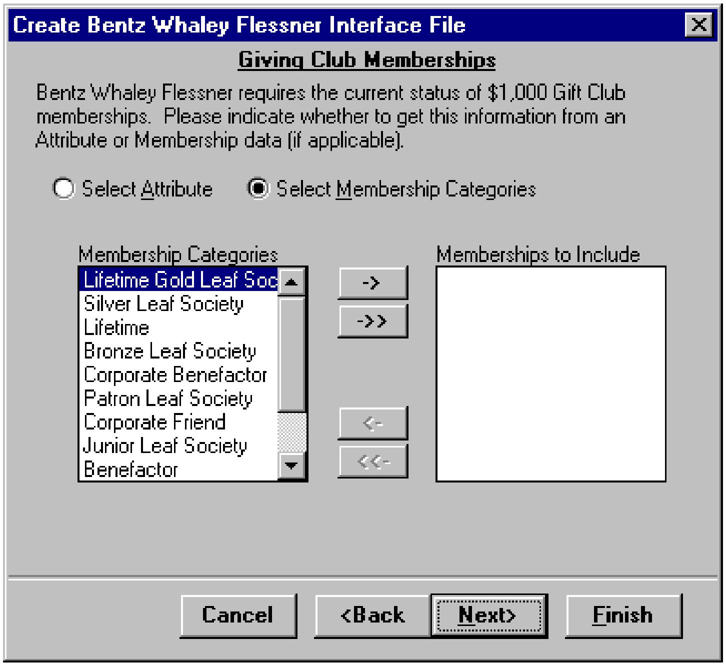
The Giving Club Memberships screen appears. Mark the option to designate whether to get membership information from selected attributes or from selected membership categories.

If you mark the **Select Attribute** option, select the attribute from the drop-down list.

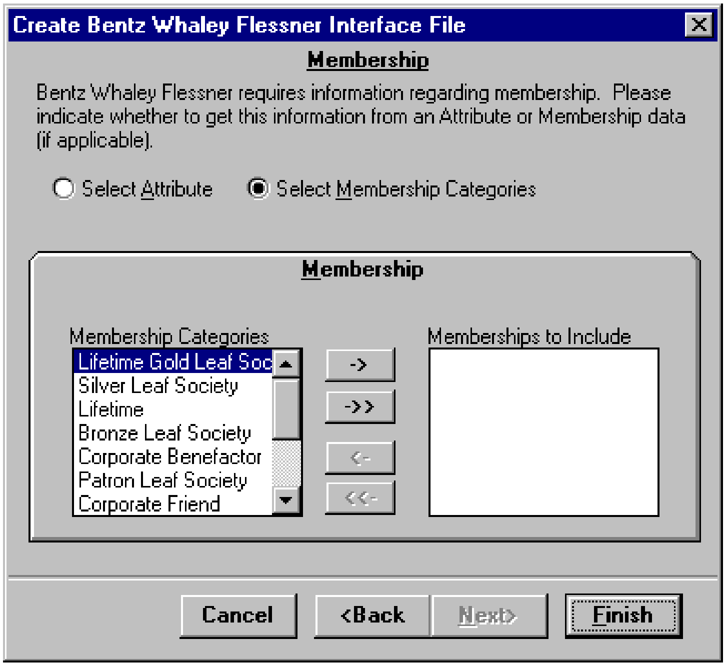
If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include**.



The Membership screen appears. Mark the option to designate whether to get membership information from selected attributes or from selected membership categories.

If you mark the **Select Attribute** option, select the attribute from the drop-down list.

If you mark the **Select Membership Categories** option which appears only if you have *RE:Member*, you must move any membership categories into the **Memberships to Include**.



The next screen to appear is the Enter Interface File Name screen shown in Step 12 above. The remaining screens are the same as in the detailed procedure.

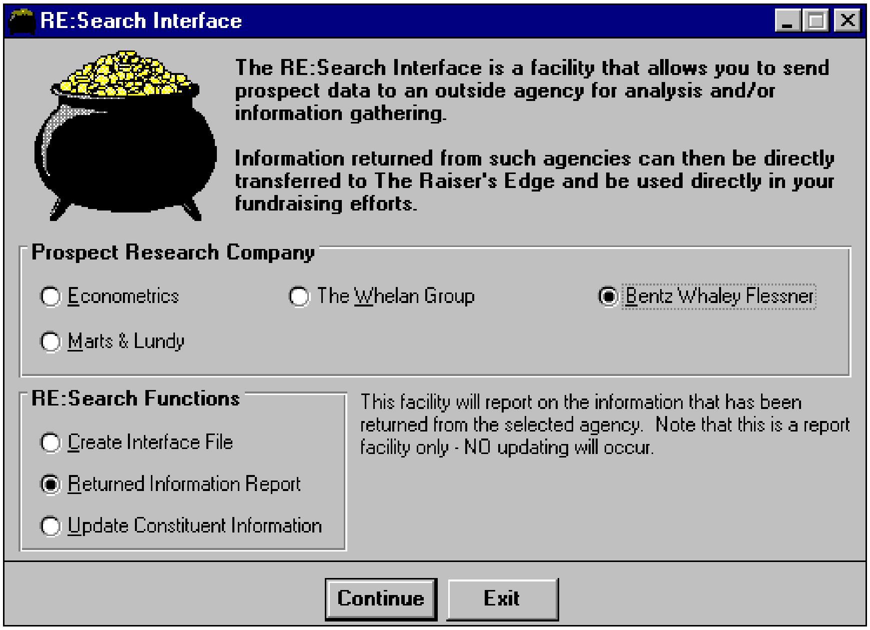
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

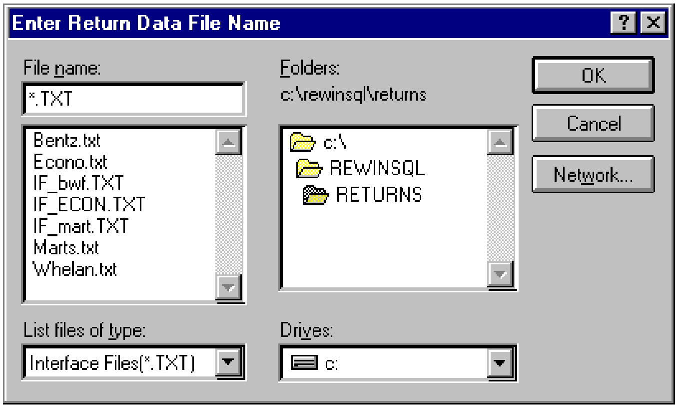
➢ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.

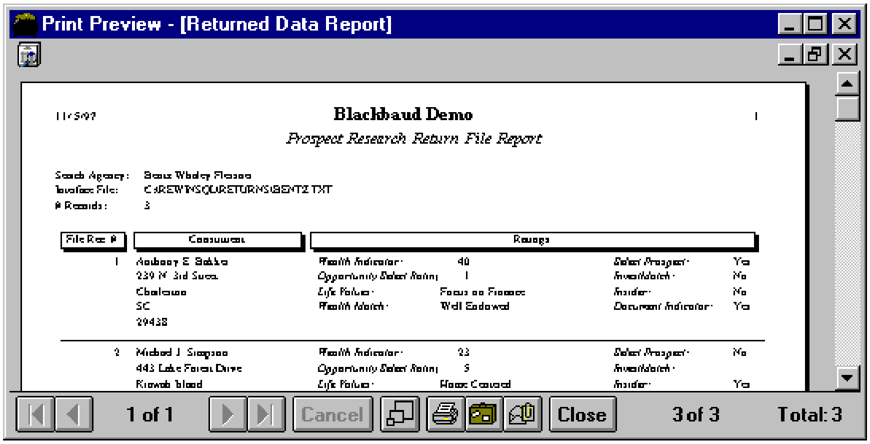


2. Select the **Bentz Whaley Flessner** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



Use the standard buttons to navigate and perform specific tasks.

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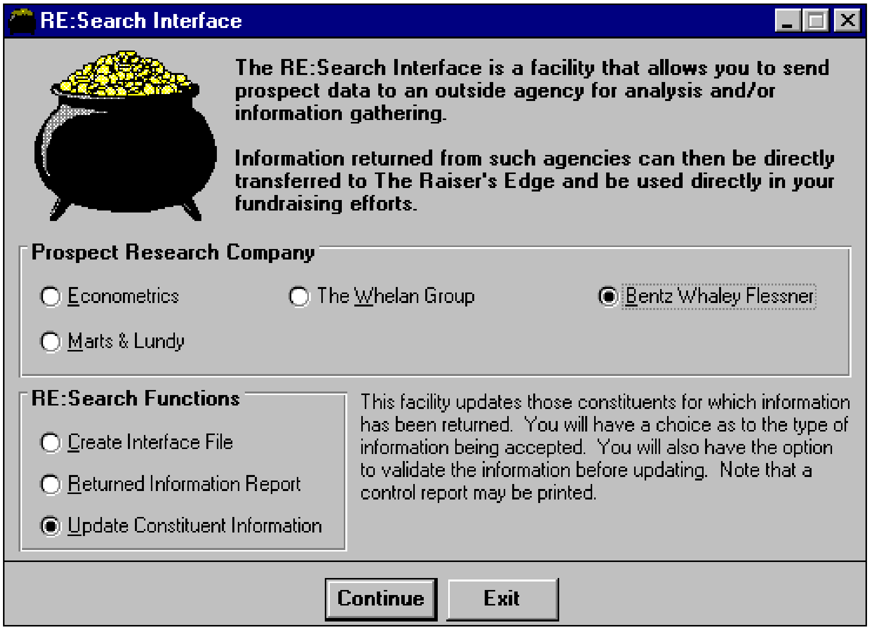
Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

➢ **To update your constituent information:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **Bentz Whaley Flessner** radio button for the Prospect Research Company and select the **Update Constituent Information** radio button for the RE:Search Functions.

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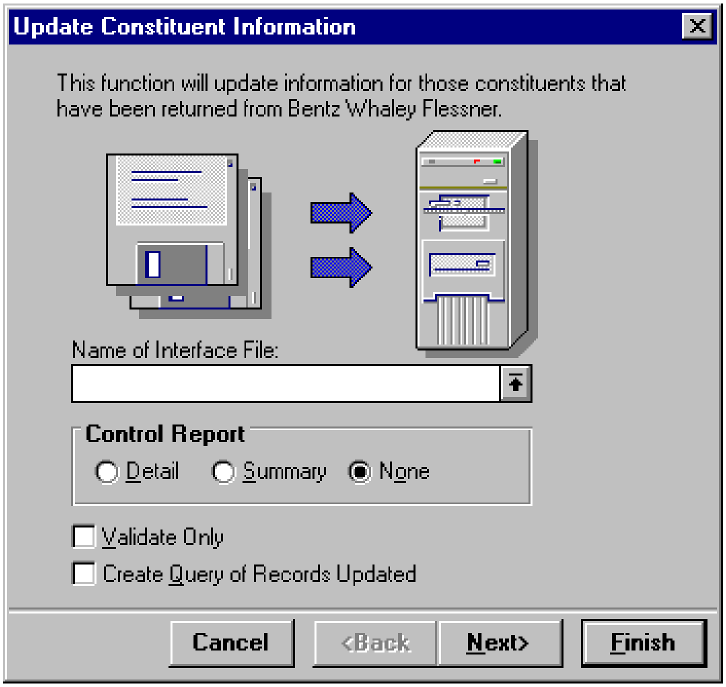
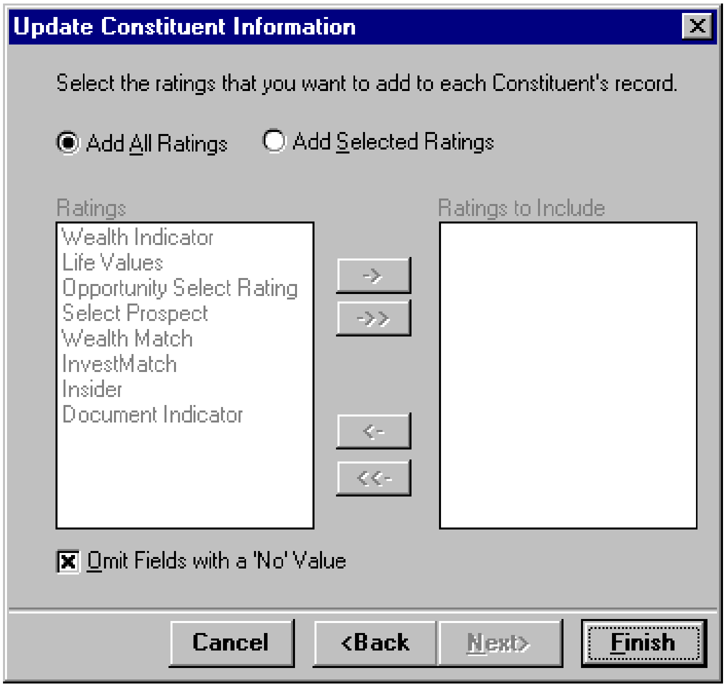
3. Click **Continue**. The following screen appears.



Enter the path (location) and name of the interface file that you received from Bentz Whaley Flessner or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

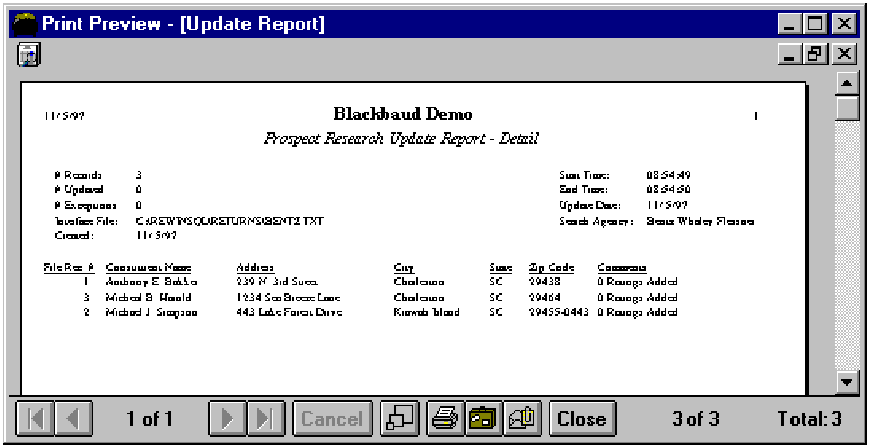
You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

4. Click **Next**. The following screen appears.



From this screen you can select to add all of the ratings that have been returned to you from Bentz Whaley Flessner or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a ‘No’ Value** by marking the checkbox. This means any returned ratings with a ‘No’ value will not be added to the constituent’s rating information upon update. For example, if a prospect constituent receives a ‘No’ rating from Bentz Whaley Flessner based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

5. Click **Finish**. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report, in either detail or summary form, may appear.



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CHAPTER 7

Working with CDA/Investnet

In This Chapter

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CDA/Investnet Requirements

CDA/Investnet requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

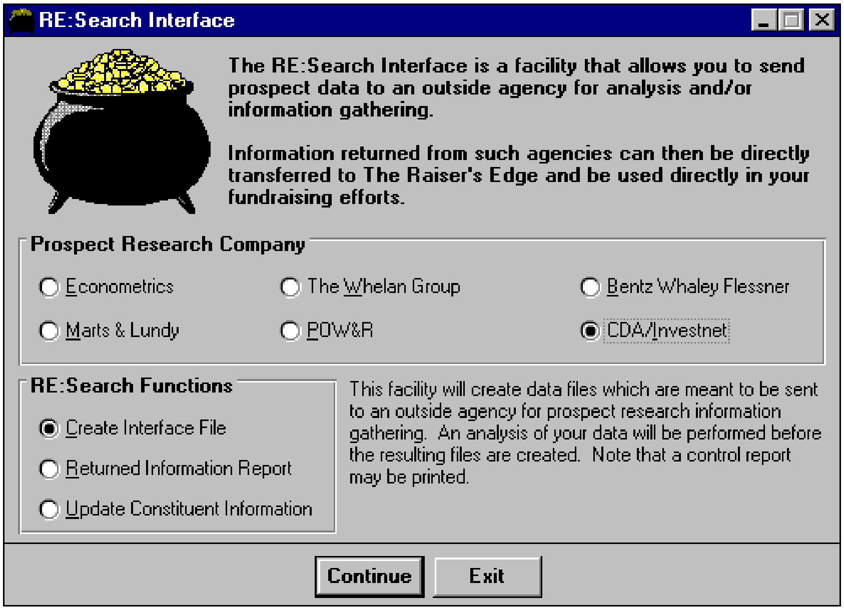
Creating the Interface File

For CDA/Investnet to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the file. You can select constituents to include in this file by using a existing query or by selecting all constituents. This file can be placed on diskette(s) that you send to CDA/Investnet. CDA/Investnet reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there is a Wizard that will prompt you for the appropriate parameters. These parameters are saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

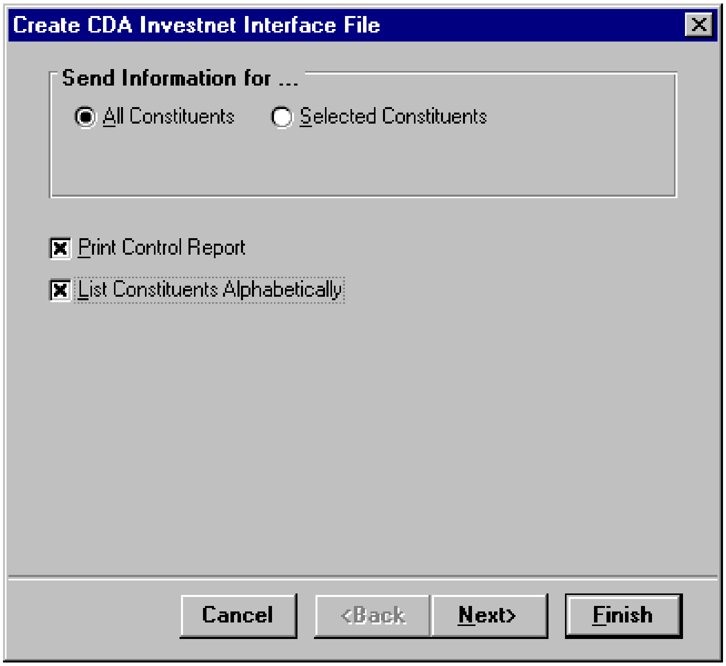
➢ To create an interface file:

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **CDA/Investnet** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create CDA/Investnet Interface File screen appears.

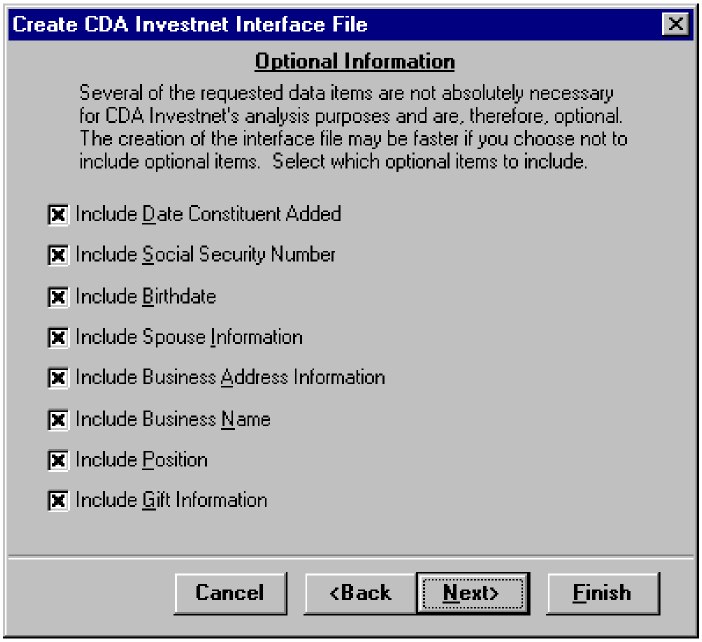


4. Select either the **All Constituents** or **Selected Constituents** radio button, depending on which you want your data file for CDA/Investnet to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click on to select from a list of available queries.

5. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to CDA/Investnet.

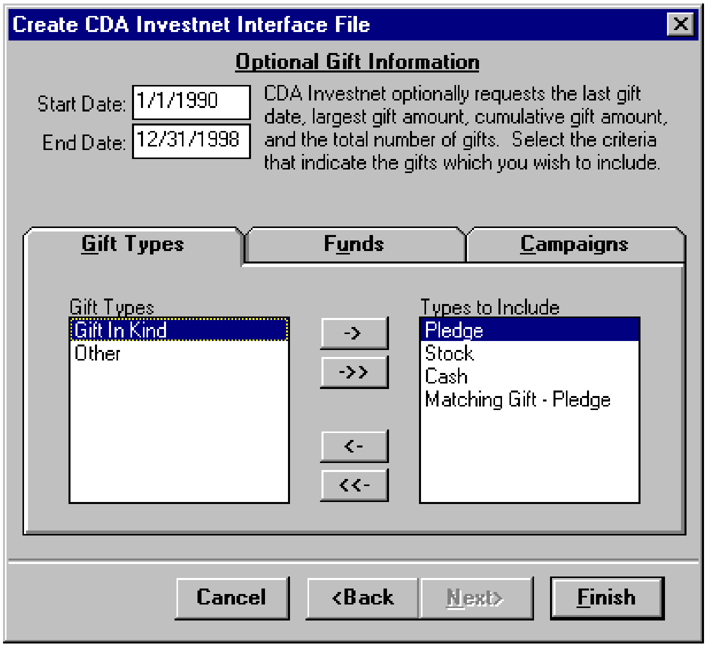
6. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

7. Click Next to continue. The Optional Information screen appears.



8. This screen allows you to select whether to include optional information – that is information that is not required by CDA/Investnet. Including any of the optional items may slow down the creation of the interface file. Select the optional information you would like to include in the file by marking the checkboxes.

9. Click **Next** to continue. The Optional Gift Information screen appears.



10. The Option Gift Information screen allows you to enter gift information. Enter the start and end dates for the most recent full year. Then click on the series of tabs to select the gift types, funds, or campaigns to include in the cumulative gift amount for the most recent full year. This screen will not appear if you do not choose to include Gift information on the Optional Information screen that appears prior to this screen.

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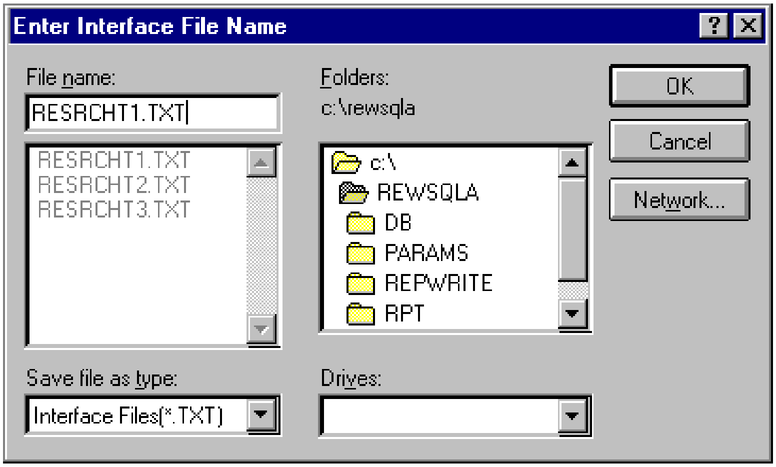
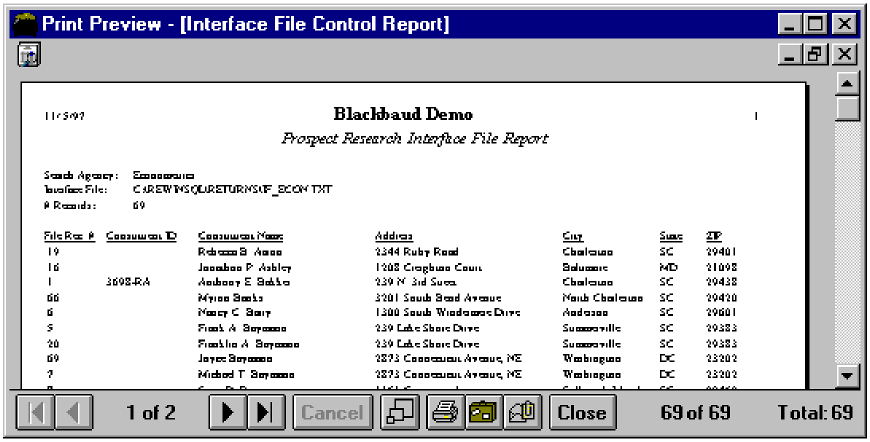
11. Click **Finish**. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



12. Click **OK** when you've entered the appropriate file name and path (location).

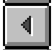
13. A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

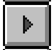
    Otherwise, a report of the records included in the interface file appears on the screen.



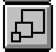
From this report window, you can use the standard buttons to navigate and perform specific tasks.

 Go to the first page of the report.

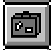
 Go back one page.

 Go forward one page.

 Go to the last page of the report.

 Zoom the report to make it larger or smaller.

 Print a hard copy to the printer set as the default in Windows.

 Export the report to a file.

 Send the report to another user via e-mail.

You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

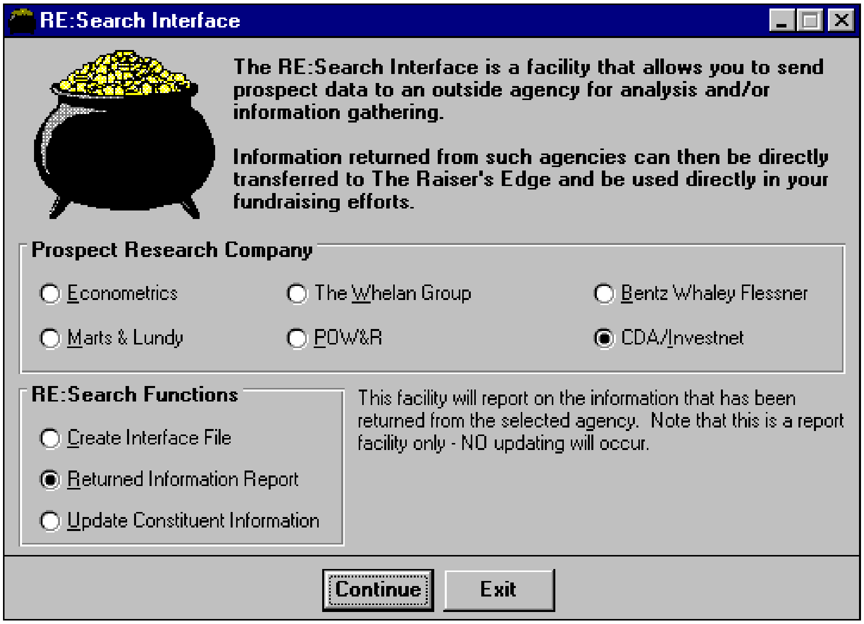
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

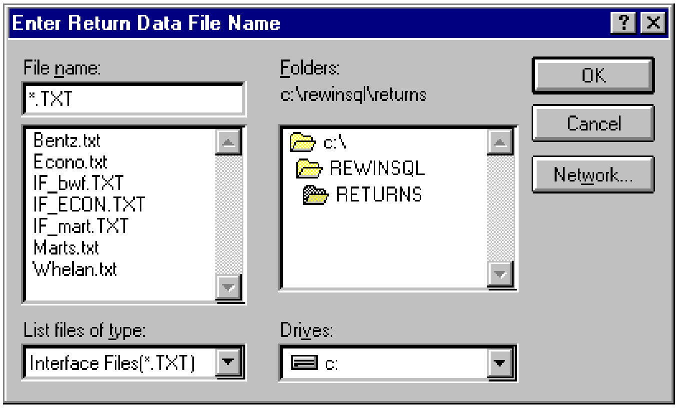
➢ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.

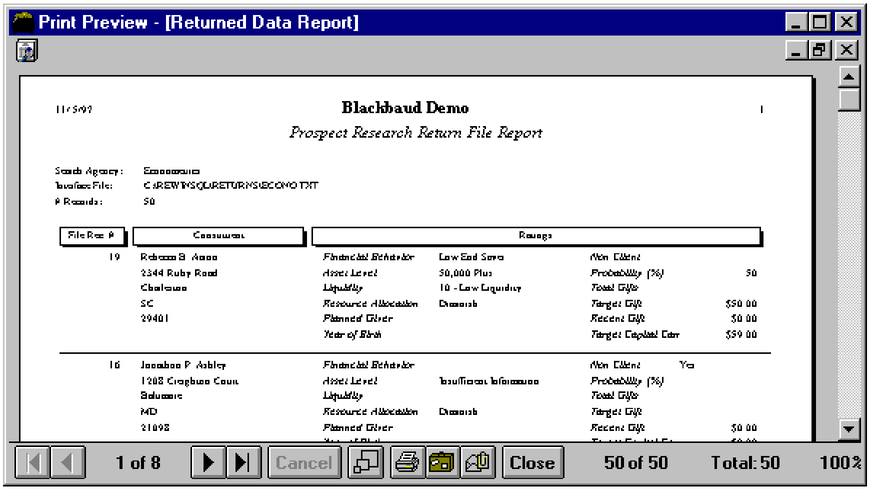


2. Select the **CDA/Investnet** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



Use the standard buttons to navigate and perform specific tasks.

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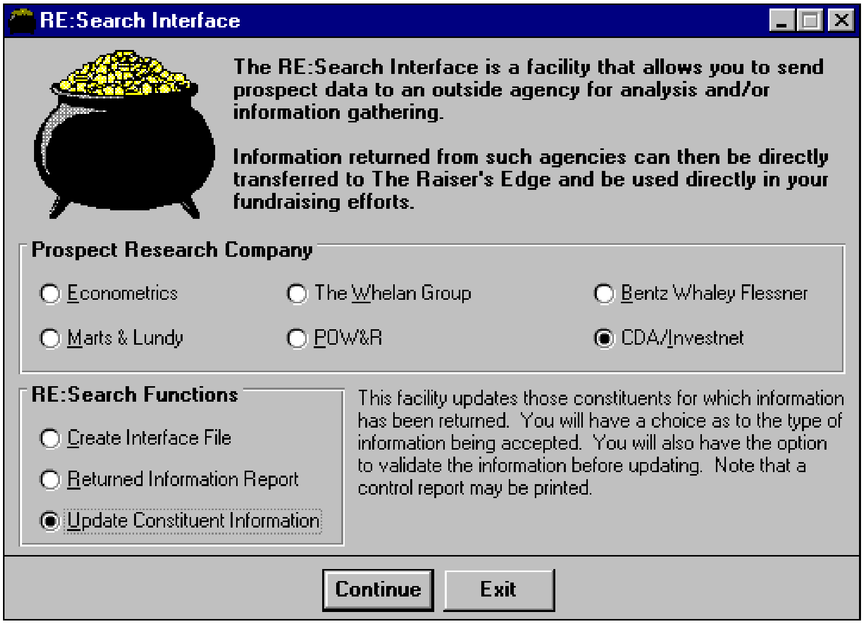
Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via the constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

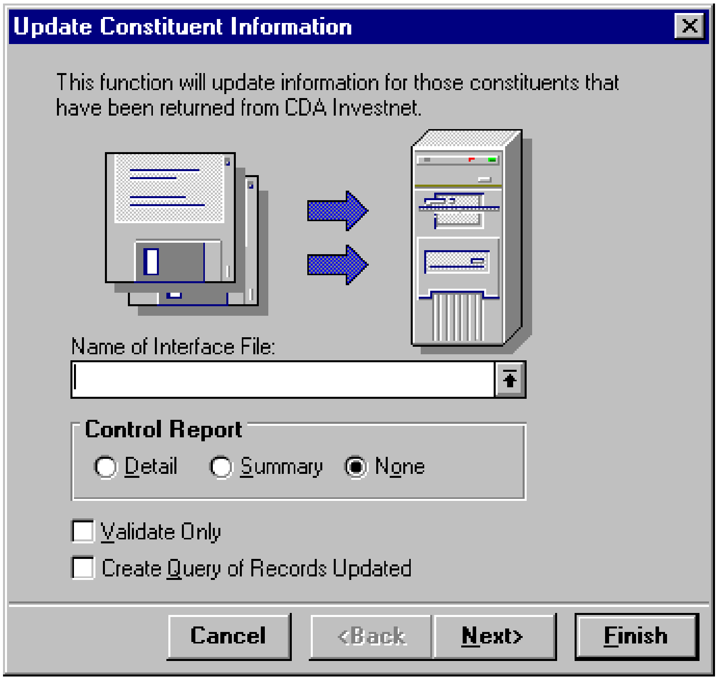
➢ **To update your constituent information:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **CDA/Investnet** radio button for the Prospect Research Company and select the **Update Constituent Information** radio button for the RE:Search Functions.

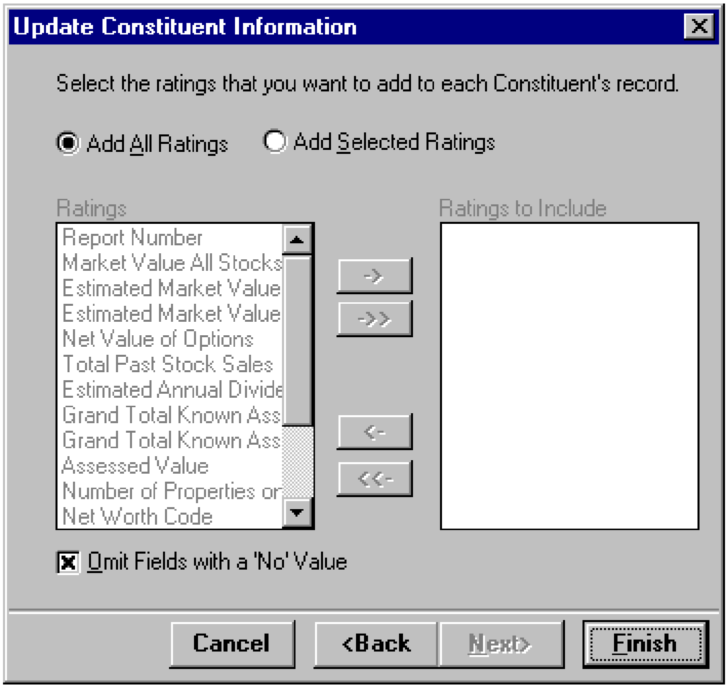
3. Click **Continue**. The following screen appears.



4. Enter the path (location) and name of the interface file that you received from CDA/Investnet or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

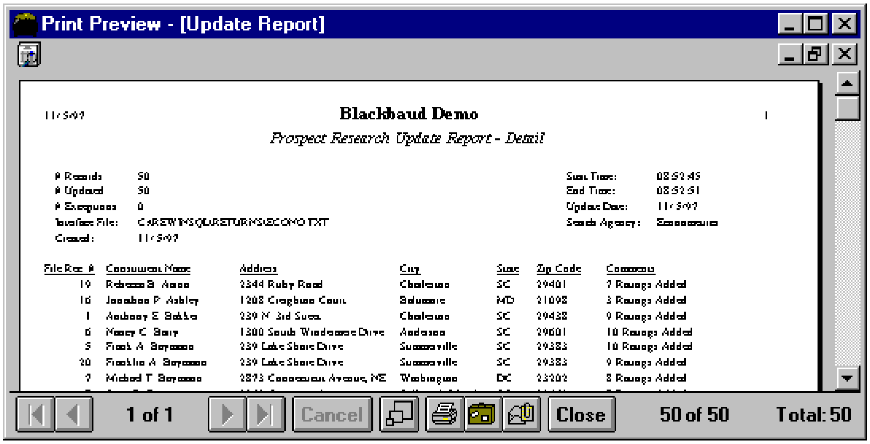
5. You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

6. Click **Next**. The following screen appears.



7. From this screen you can select to add all of the ratings that have been returned to you from CDA/Investnet or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a 'No' Value** by marking the checkbox. This means any returned ratings with a 'No' value will not be added to the constituent's rating information upon update. For example, if a prospect constituent receives a 'No' rating from CDA/Investnet based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

8. Click **Finish**. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report, in either detail or summary form, may appear.



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CHAPTER 8

Working with POW&R

In This Chapter

POW&R Requirements

POW&R requires that data sent in for prospect research be in a specific format. Each field must take up a certain number of characters in order for the record layout to be correct. Blackbaud has written the *RE:Search* electronic interface to meet these specifications to make updating your constituent prospect information as simple as possible. Specific file layout information appears in the appendix of this guide.

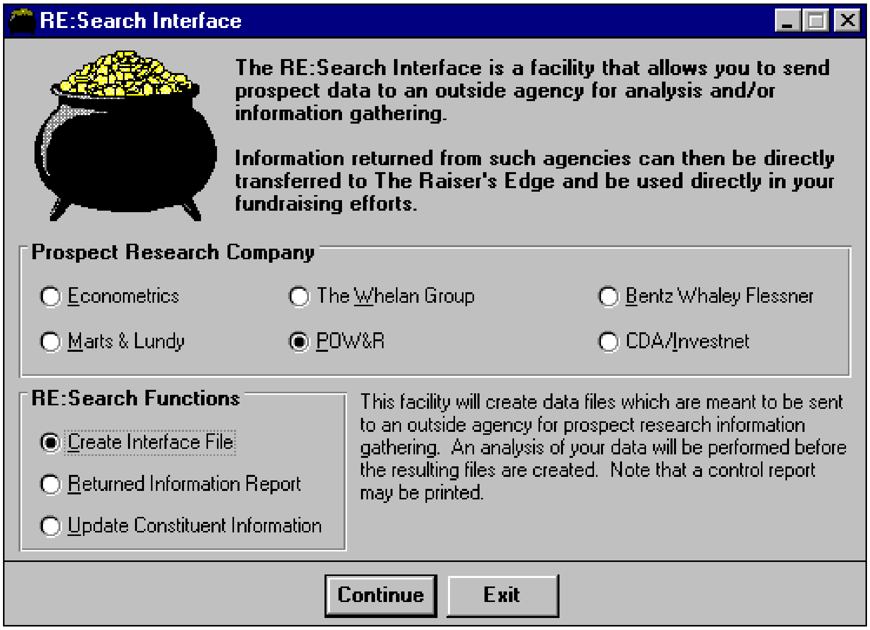
Creating the Interface File

For POW&R to update the constituent prospect records stored in ***The Raiser's Edge***, you must generate a data file. The data file includes all of the constituent prospects that meet the parameters you define when creating the file. You can select constituents to include in this file by using a existing query or by selecting all constituents. This file can be placed on diskette(s) that you send to POW&R. POW&R reviews your constituent prospect records and performs a detailed analysis, including ratings, on the constituents supplied. When they have completed the analysis, they send the file back to you so that you can update the constituents in ***The Raiser's Edge***.

Each prospect research company requires different information to be sent. For each company, there is a Wizard that will prompt you for the appropriate parameters. These parameters are saved and reloaded the next time the program is run. Separate parameters are saved for each company. Since each company requires different information, the screens for each Wizard may differ, though many screens will be the same.

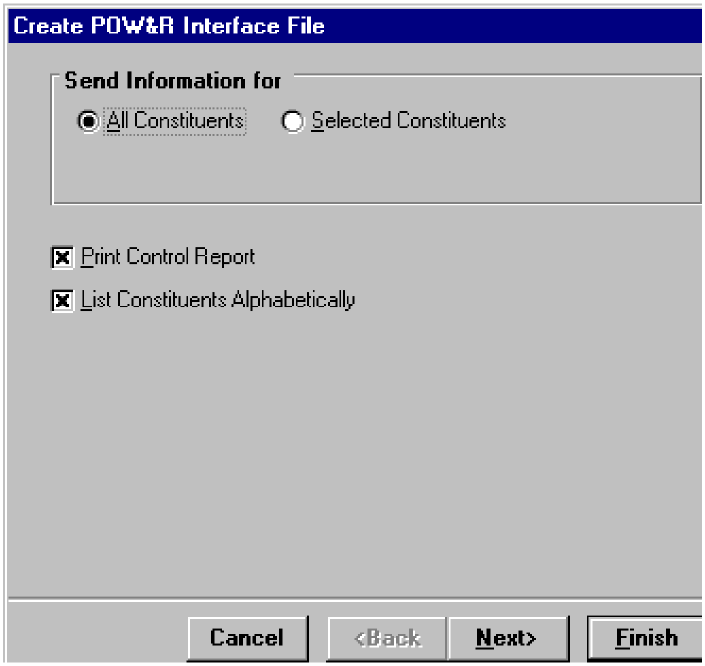
➢ To create an interface file:

1. Start the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select the **POW&R** radio button for the Prospect Research Company and select the **Create Interface File** radio button for the RE:Search Functions.

3. Click **Continue**. The Create POW&R Interface File screen appears.

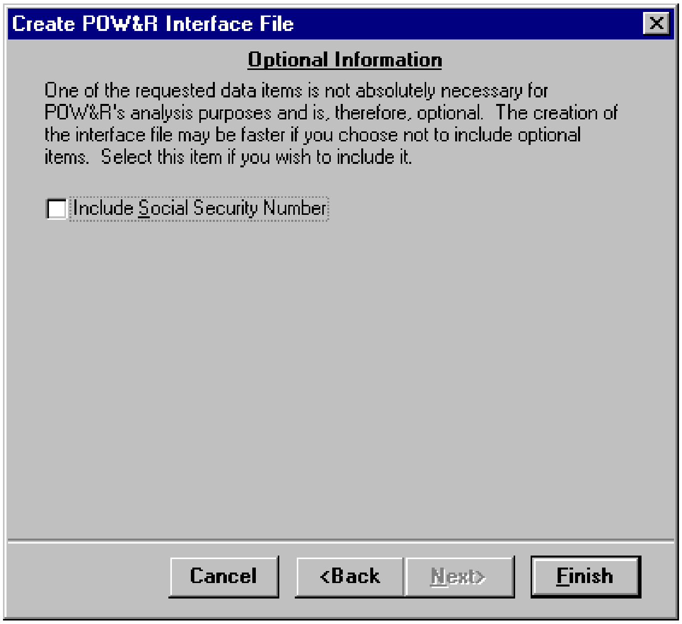


4. Select either **All Constituents** or **Selected Constituents**, depending on what you want your data file for POW&R to include. If your data file is only going to contain selected constituents, you must select a query in the **From Group** box. Click on to select from a list of available queries.

5. Mark the checkbox for **Print Control Report** if you'd like a report of all of constituent files that were selected above to send to POW&R.

6. Mark the checkbox for **List Constituents Alphabetically** if you'd like the constituents to print in alphabetical order.

7. Click Next to continue. The Optional Information screen appears.



8. This screen allows you to select whether you want to include the social security number. POW&R does not require the social security number for the interface file, but you can mark the checkbox if you would like to include it. Including any optional information may slow down the creation of the interface file.

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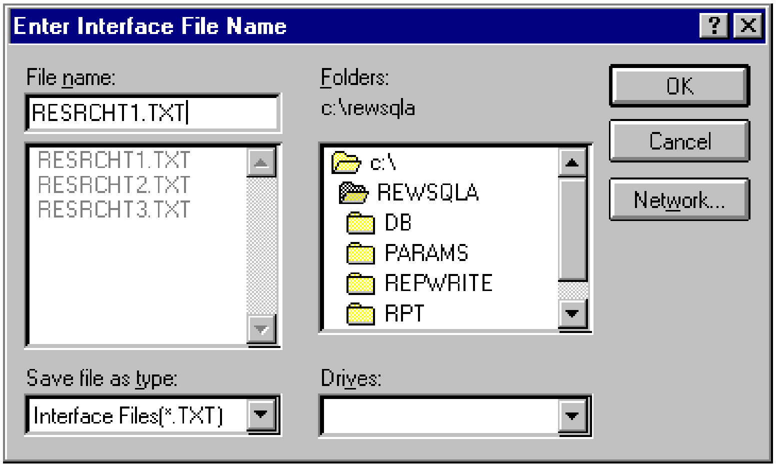
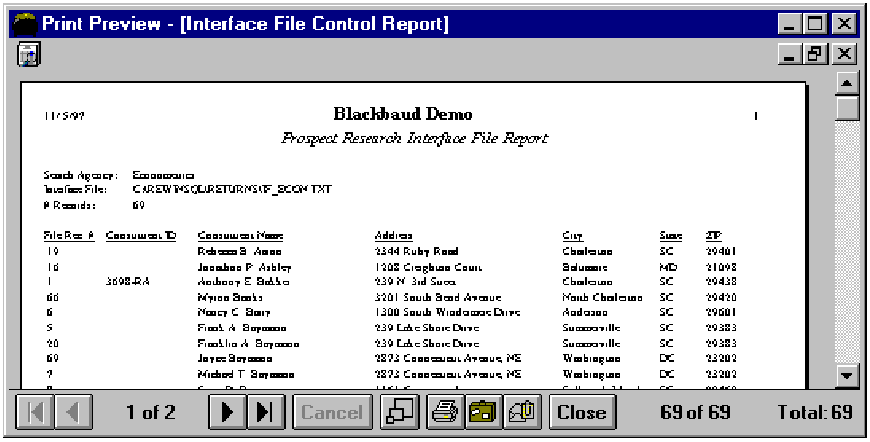
9. Click **Finish**. The Enter Interface File Name screen appears, prompting you to choose a file name and location for the interface file you are creating.



10. Click **OK** when you've entered the appropriate file name and path (location). A status screen may appear while the file is being created. Once the status bar reaches 100% and if no control report is to be printed, a screen appears showing how many records were written into the file and how long it took.

Otherwise, a report of the records included in the interface file appears on the screen.



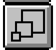
From this report window, you can use the standard buttons to navigate and perform specific tasks.

 Go to the first page of the report.

 Go back one page.

 Go forward one page.

 Go to the last page of the report.

 Zoom the report to make it larger or smaller.

 Print a hard copy to the printer set as the default in Windows.

 Export the report to a file.

 Send the report to another user via e-mail.

You can copy the interface file from the location where it was created onto diskette(s) to submit to the prospect research company.

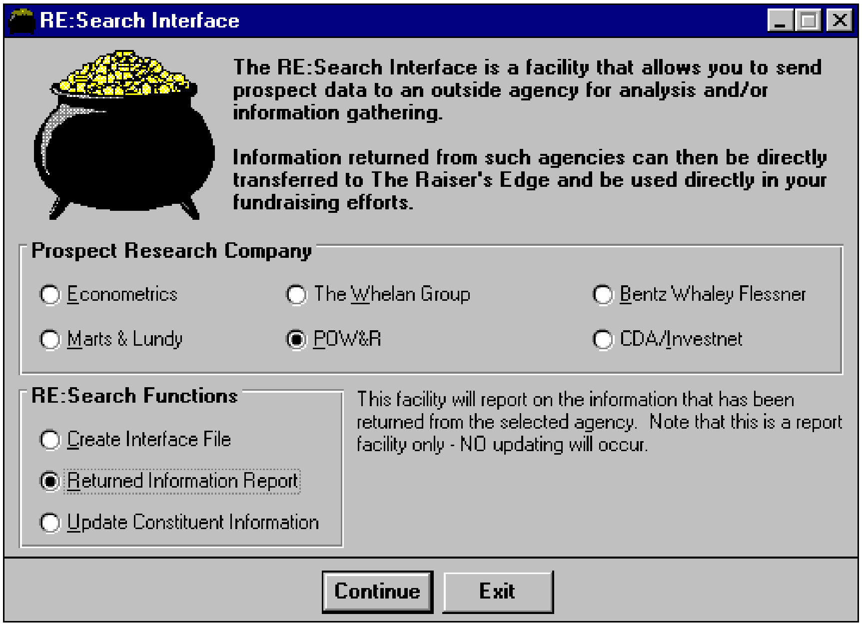
Returned Information Report

When a data file is returned to you from the prospect research company, you can print a report which will detail the constituent prospect information, rejection details if applicable, and a summary of which data was returned.

Note: You should print this prior to updating the constituent information in ***The Raiser's Edge***.

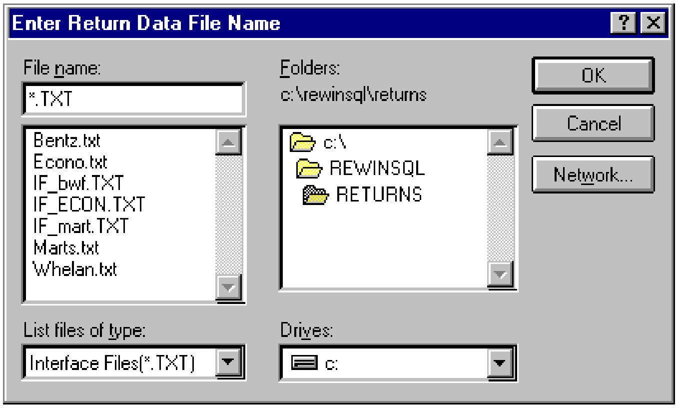
➢ **To run the returned information report:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.

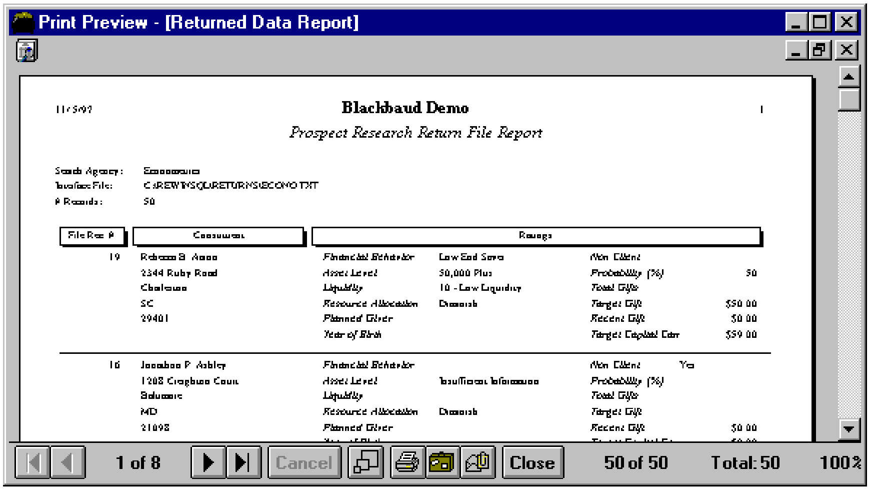


2. Select the **POW&R** radio button for the Prospect Research Company and select the **Returned Information Report** radio button for the RE:Search Functions.

3. Click **Continue**. The Enter Return Data File Name screen appears.



4. Locate and select the appropriate returned information file and click **OK**. The Returned Data Report screen appears.



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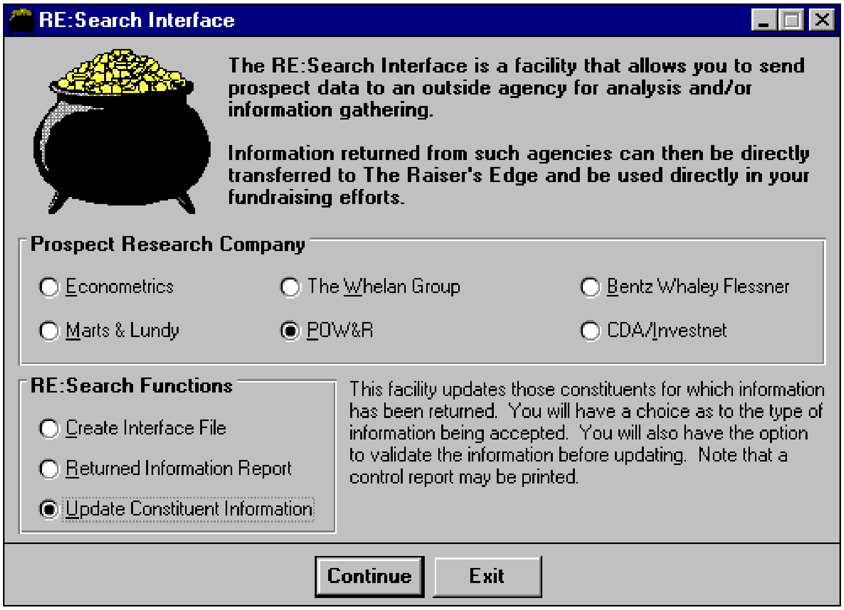
Updating Constituent Information

Each record is interrogated and should be matched with data in ***The Raiser Edge for Windows*** via the constituent record number. Appropriate prospect research data is appended to existing information. The system WILL NOT alter or replace information; it only adds the new data.

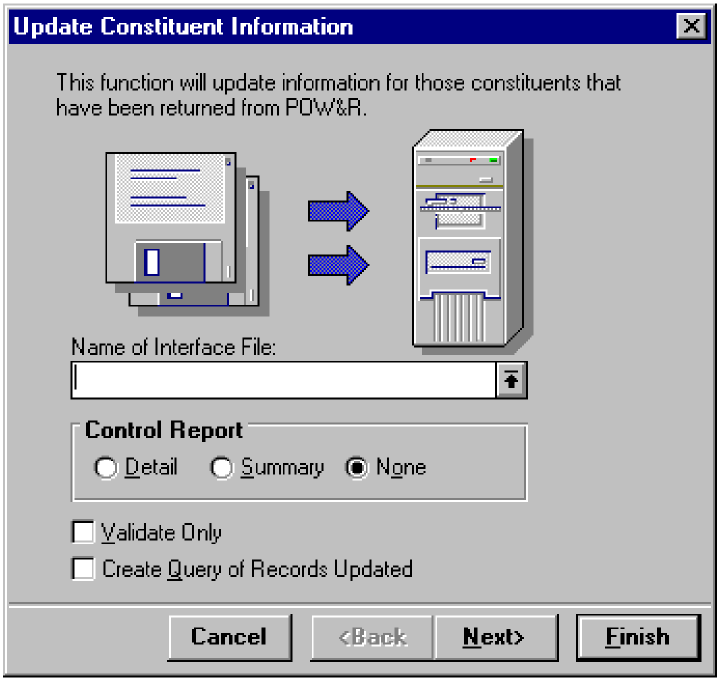
➢ **To update your constituent information:**

1. Open the *RE:Search* electronic interface module. The main RE:Search Interface screen appears.



2. Select **POW&R** for the Prospect Research Company and select the **Update Constituent Information** for the RE:Search Functions.

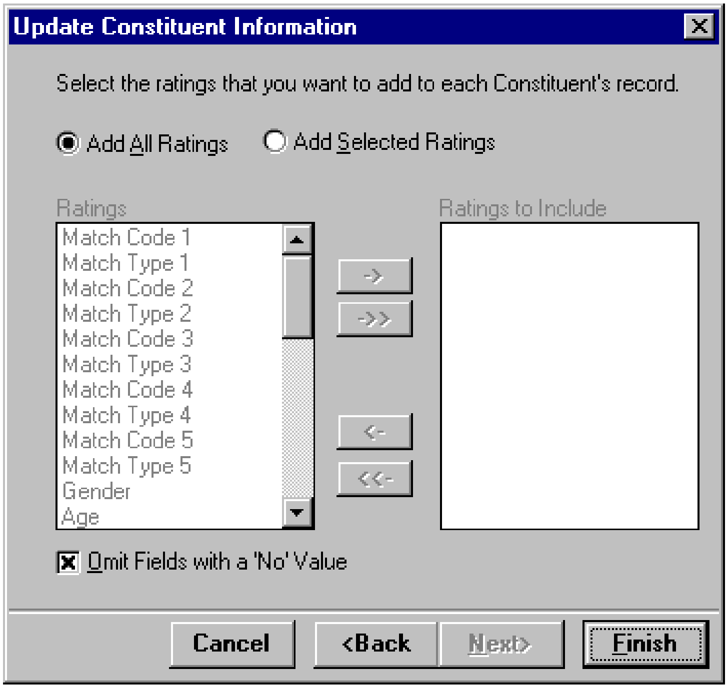
3. Click **Continue**. The Update Constituent Information screen appears.



4. Enter the path (location) and name of the interface file that you received from POW&R or use the lookup arrow to locate the file. Mark the appropriate control report option depending on whether you want a detailed report, a summarized report, or no report at all.

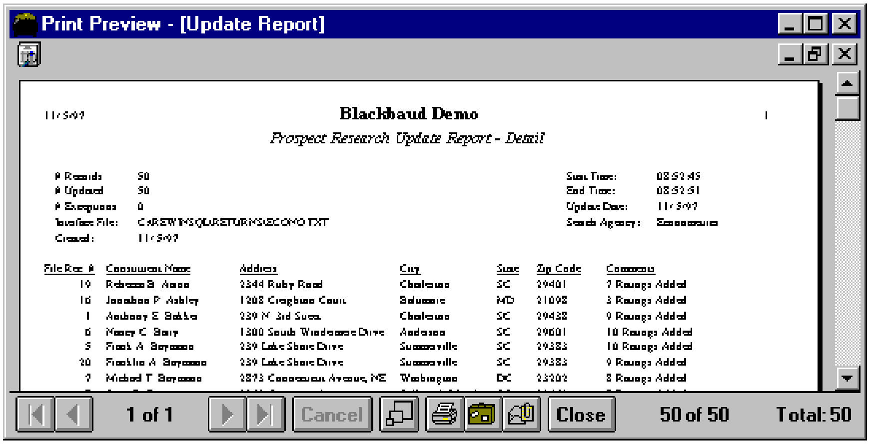
5. You can also designate to only validate the new constituent information, not update it. In addition, if designated, the system will create a query of the records that this interface file will update.

6. Click **Next**. The Update Constituent Information screen appears.



7. From this screen you can select to add all of the ratings that have been returned to you from POW&R or just selected ones. If you mark the **Add Selected Ratings** radio button, the ratings grids below it will be activated, allowing you to selectively include specific ratings. You may also opt to **Omit Fields with a 'No' Value** by marking the checkbox. This means any returned ratings with a 'No' value will not be added to the constituent's rating information upon update. For example, if a prospect constituent receives a 'No' rating from POW&R based on whether they would make a good capital campaigns giver, the constituent record would not reflect this, if this option is marked – only prospect constituents who are found to be good capital campaigns givers would be so updated in your system.

8. Click **Finish**. Constituent records will be appended according to the options you specified. A status bar will appear to show the approximate progress of the update. Once complete, a control report, in either detail or summary form, may appear.



A P P E N D I X

Prospect Research File Formats

In This Chapter

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Econometrics

Export File Format

Econometrics files have fixed-length fields surrounded by quotes, separated by commas.

Field	Start	End	Length	Notes
ID	2	21	20	Primary Key
Institution	25	39	15	Client Name
Status	43	48	6	Blank; not used
Surname	52	81	30	Last Name
GivenName	85	114	30	First Name
MiddleInit	118	135	18	Middle Init or Name
Address1	139	178	40	Primary Address Line 1
Address2	182	221	40	Primary Address Line 2
City	225	254	30	
State	258	259	2	
Zip	263	272	10	
Telephone[1]	276	293	18	
Gifts Year 1	297	306	10	No currency, 2 decimal places
Gifts Year 2	310	319	10	No currency, 2 decimal places
Gifts Year 3	323	332	10	No currency, 2 decimal places
3 yr. Gift total	336	345	10	No currency, 2 decimal places
CR/LF	347	348	2	Carriage Return/Line Feed

[1] These items are optional.

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Return File Format

Econometrics files have fixed-length fields surrounded by quotes, separated by commas.

Field	Start	End	Length	Notes
ID	2	21	20	Primary Key
Institution	25	39	15	From the original sent file
Status	43	48	6	From the original sent file
Surname	52	81	30	From the original sent file
GivenName	85	114	30	From the original sent file
MiddleInit	118	135	18	From the original sent file
Address1	139	178	40	From the original sent file
Address2	182	221	40	From the original sent file
City	225	254	30	From the original sent file
State	258	259	2	From the original sent file
Zip	263	272	10	From the original sent file
Telephone	276	293	18	From the original sent file
Year of Birth	297	300	4	YYYY format
Asset Level	304	307	4	see below
Financial Behavior	311	314	4	see below
Liquidity	318	321	4	see below
NonClient	325	328	4	0,1 or blank
Gift Year-1	332	341	10	Numeric, Recent Gift
Total Gifts	345	354	10	Numeric
Probability	358	361	4	Numeric
Target Gift	365	374	10	Numeric
Capital Campaign Gift	378	387	10	Numeric
Planned Givers	391	394	4	see below
Resource	398	401	4	see below
CR/LF	403	404	2	Carriage Return/Line Feed

Econometrics also returns file w/NCOA data. The Prospect Research facility will only handle the Standard File Layout.

Codes

Asset Level

Code	Translation
1	10 million plus
2	5 million plus
3	1 million plus
4	500,000 plus
5	250,000 plus
6	200,000 plus
7	150,000 plus
8	100,000 plus
9	50,000 plus
10	less than 50,000
11	Insufficient Information

Financial Behavior

Code	Translation
1	Wealthy Entrepreneur
2	High End Saver
3	Moderate Saver
4	Low End Saver
5	High End Spender
6	Moderate Spender
7	Low End Spender
8	Insufficient Information

Liquidity

Code	Translation
1-3	High
4-6	Moderate
7-10	Low
11	Insufficient Information

Planner Giver

Code	Translation
1	Focus
2	Invest
3	Maintain
4	Retain
5	Diminish

Resource Allocation

Code	Translation
11	Focus 1000
12	Focus 500
13	Focus
21	Invest 1000
22	Invest 500
23	Invest
30	Maintain
42	Retain
50	Diminish

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Marts & Lundy

Education

Field	Start	End	Length	Notes
ID	1	11	11	Primary Key
Title	12	23	12	
First	24	38	15	
Middle	39	39	1	
Last	40	59	20	
Suffix	60	63	4	
Address	64	103	40	
City	104	123	20	
State	124	125	2	
Zip	126	130	5	
Plus4	131	134	4	
Telephone	135	144	10	No formatting
FY1997	145	153	9	Round to nearest integer
FY1996	154	162	9	Round to nearest integer
FY1995	163	171	9	Round to nearest integer
Largest Gift	172	180	9	Round to nearest integer
ConType	181	188	8	Constituent Code (short desc.)
ClassYr	189	192	4	YYYY format
School	193	200	8	
Degree	201	208	8	
Filler	209	314	106	Pad w/ spaces
CR/LF	315	316	2	Carriage Return/Line Feed

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Membership

Field	Start	End	Length	Notes
ID	1	11	11	Primary Key
Title	12	23	12	
First	24	38	15	
Middle	39	39	1	
Last	40	59	20	
Suffix	60	63	4	
Address	64	103	40	
City	104	123	20	
State	124	125	2	
Zip	126	130	5	
Plus4	131	134	4	
Telephone	135	144	10	No formatting
Largest Gift	145	153	9	Round to nearest integer
Last Gift	154	162	9	Round to nearest integer
Year of Last	163	166	4	YYYY
Lifetime	167	175	9	Round to nearest integer
Join Year	176	179	4	Earliest; Format: YYYY
Acquistion Method	180	187	8	
Lapsed Year	188	191	4	Latest; Format: YYYY
Total # of Gifts	192	193	2	##[1]
Member Type	194	201	8	Constituent Code (short desc.)
Filler	202	314	113	Pad w/ spaces
CR/LF	315	316	2	Carriage Return/Line Feed

[1] If the donor has more than 99 gifts, then return 99. Thus 99 represents 99 or more gifts.

Hospital Donors

Field	Start	End	Length	Notes
ID	1	11	11	Primary Key
Title	12	23	12	
First	24	38	15	
Middle	39	39	1	
Last	40	59	20	
Suffix	60	63	4	
Address	64	103	40	
City	104	123	20	
State	124	125	2	
Zip	126	130	5	
Plus4	131	134	4	
Telephone	135	144	10	No formatting
FY1997	145	153	9	Round to nearest integer
FY1996	154	162	9	Round to nearest integer
FY1995	163	171	9	Round to nearest integer
Largest	172	180	9	Round to nearest integer
RecordType	181	188	8	Constituent Code (short desc.)
Patient Flag	189	189	1	Y or Blank
Donor Status	190	197	8	Attribute
Filler	198	314	117	Pad w/ spaces
CRLF	315	316	2	Carriage Return/Line Feed

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Hospital Patients

Field	Start	End	Length	Notes
ID	1	11	11	Primary Key
Title	12	23	12	
First	24	38	15	
Middle	39	39	1	
Last	40	59	20	
Suffix	60	63	4	
Address	64	103	40	
City	104	123	20	
State	124	125	2	
Zip	126	130	5	
Plus4	131	134	4	
Telephone	135	144	10	No formatting
Birth Date	145	150	6	MMDDYY
DRG Code	151	156	6	Text
Admitting Physician	157	165	9	Text
Attending Physician	166	174	9	Text
Discharge Date	175	180	6	MMDDYY
Multiple Admission	181	181	1	Y or Blank
Family Admission	182	182	1	Y or Blank
Filler	183	314	132	Pad w/ spaces
CR/LF	315	316	2	Carriage Return/Line Feed

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Return File Format

All optional data fields are included in the data file. However, only those fields a client has purchased will contain data. All other (unpaid for) fields will be blank.

Field	Start	End	Length	Notes
ID	1	11	11	Primary Key
Title	12	23	12	From RE
First	24	38	15	From RE
Middle	39	39	1	From RE
Last	40	59	20	From RE
Suffix	60	63	4	From RE
Address	64	103	40	From RE
City	104	123	20	From RE
State	124	125	2	From RE
Zip	126	130	5	From RE
Plus4	131	134	4	From RE
Telephone	135	144	10	From RE
Time Zone	145	147	3	Time Zone (see below)
Telephone	148	157	10	No formatting
PPR	158	159	2	Potential Plus Rating; 1-33;99
Lifestyle Type[1]	160	160	1	C,U,S,T,R,G,X
Lifestyle Code[1]	161	162	2	01-60;99
Match Level	163	163	1	see below
MSA	164	167	4	Numeric; 4 digits
Zip+4	168	176	9	Numeric; 9 digits
Fast Track Flag	177	177	1	Y or blank
Net Worth	178	178	1	0-5 (see below)
Est. Home Value	179	184	6	0-500001
Est. Household Income	185	190	6	0-150001
Age of Head of Household	191	191	1	see below
Dwelling Unit Size	192	194	2	see below
Length of Residence	194	195	2	0-99
Health Contributor	196	196	1	Y,N or blank
Political Contributor	197	197	1	Y,N or blank
Children <6	198	198	1	Y,N or blank
Children 6-11	199	199	1	Y,N or blank

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Field (cont.)	Start	End	Length	Notes
Children 12-17	200	200	1	Y,N or blank
Children 0-17	201	201	1	Y,N or blank
Mail Responsiveness	202	202	1	Y,N or blank
Capacity[2]	203	203	1	A,B,C,D,E,or Blank
Propensity[2]	204	204	1	1-4; blank
Attitude[2]	205	205	1	1-5 or blank
Area of Interest[2]	206	206	1	1-9 or blank (client defined)
Reported Charitable Budget[2]	207	207	1	1-6 or blank (client defined)
Largest Reported Gift[2]	208	208	1	1-6 or blank (client defined)
Reported Income Range[2]	209	209	1	1-6 or blank (client defined)
CR/LF	210	211	2	Carriage Return/Line Feed

[1] Lifestyle Type and Code are entered into RE as 1 rating. Entries are defined in the ClusterPlus 2000 guide.

[2] These codes are planned for future M&L survey results.

Codes

Time Zone

Code	Description
ALT	Atlantic
AST	Alaska
CST	Central
EST	Eastern
HST	Hawaii
MST	Mountain
NTZ	None Specified
PST	Pacific
SST	Samoa

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Match Level

Code	Description
H	Household (name & address) match
B	Block Group (address only) match
P	Zip Plus Four match
Z	Zip Code match
N	Not coded

Age of Head of Household

Code	Description
A	24 or younger
B	25-29 inferred
C	30-34 inferred
D	35-39 inferred
E	40-44 inferred
F	45-49 inferred
G	50-54 inferred
H	55-59 inferred
I	60-64 inferred
J	65 and older inferred
K	65-69
L	70-74
M	75 and older
blank	unknown

Net Worth

Code	Description
1	$10 million or more
2	$5-$10 million
3	$2-$5 million
4	$1.5-$2 million
5	$1-$1.5 million
blank or 0	Less than $1 million or unknown

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Dwelling Unit Size

Code	Description
01-09	Number of households in unit
10	10-19 units
20	20-29 units
30	30-39 units
40	40-49 units
50	50-99 units
99	More than 99 units

Capacity

Code	Description
A	Highest
B	High
C	Middle
D	Low
E	Lowest
blank	undefined

Attitude

Code	Description
1	Very Positive
2	Positive
3	Neutral
4	Negative
5	Very Negative
blank	undefined

Propensity

Code	Description
1	Very Likely
2	Likely
3	Possible
4	Unlikely
blank	undefined

The Whelan Group

Export File Format

Field	Type	Length	Notes
_CONSTIT_I	Long Integer		Unused
ID	Long Integer		Primary Key
CONSID	Text	20	Constituent ID
LSTNM	Text	30	Last Name
FSTNM	Text	30	First Name
MIDNM	Text	25	Middle Name
TITL1	Text	15	Title
SUFF1	Text	15	Suffix
ADDRLN1	Text	30	Address Line 1 (primary)
ADDRLN2	Text	30	Address Line 2 (primary)
ADDRLN3	Text	30	Address Line 3 (primary)
ADDRLN4	Text	30	Address Line 4 (primary)
ADDRLN5	Text	30	Address Line 5 (primary)
ADDRCITY	Text	25	City (primary)
STATE	Text	2	State (primary)
POST_CO	Text	10	Zip Code (primary)
ADDRCOUNTR	Text	25	Country (primary)
ALCLASSOF	Text	4	YYYY format
CONS01	Text	20	Constituent Code (short desc.)
CONS02	Text	20	Constituent Code (short desc.)
CONS03	Text	20	Constituent Code (short desc.)
TRGT	Text	20	Target Code
BUORGNM	Text	50	Constituent Organization
POS	Text	30	Business Position
GSTOTA1	Number (Double)		Total Gift Amount - Annual Funds - Last Complete Fiscal Year
GSTOTA2	Number (Double)		Total Gift Amount - Support Funds - Last Complete Fiscal Year
GSTOTA3	Number (Double)		Total Gift Amount - Other Funds - Last Complete Fiscal Year
GSTOTA4	Number (Double)		Total Gift Amount - Annual Funds - 1 Fiscal Year Ago

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Field (cont.)	Type	Length	Notes
GSTOTA5	Number (Double)		Total Gift Amount - Support Funds - 1 Fiscal Year Ago
GSTOTA6	Number (Double)		Total Gift Amount - Other Funds - 1 Fiscal Year Ago
GSTOTA7	Number (Double)		Total Gift Amount - Annual Funds - 2 Fiscal Years Ago
GSTOTA8	Number (Double)		Total Gift Amount - Support Funds - 2 Fiscal Years Ago
GSTOTA9	Number (Double)		Total Gift Amount - Other Funds - 2 Fiscal Years Ago
GSTOTA10	Number (Double)		Total Gift Amount - Annual Funds - No date range
GSTOTA11	Number (Double)		Total Gift Amount - Support Funds - No date range
GSTOTA12	Number (Double)		Total Gift Amount - Other Funds - No date range
G_GFTAM1	Number (Double)		Largest Gift Amount - Annual funds
G_GFTAM2	Number (Double)		Largest Gift Amount - Other funds

Import File Format

The file is a comma-delimited text file.

Field #	Field	Type	Notes
1	ID	Numeric	Primary Key
2	CONSID	Text	From RE
3	LSTNM	Text	From RE
4	FSTNM	Text	From RE
5	MIDNM	Text	From RE
6	ADDRLN1	Text	From RE
7	ADDRCITY	Text	From RE
8	STATE	Text	From RE
9	POST_CO	Text	From RE
10	ST_Target_Code	Numeric	10-90 or Blank
11	ST_Target_Code_Translation	Text	Text translation of ST_Target_Code; to Comments
12	LT_Target_Code	Numeric	10-90 or Blank
13	LT_Target_Code_Translation	Text	Text translation of LT_Target_Code; to Comments
14	Major Gift Prospect	Text	A, B, C, R or Blank
15	Planned Gift Prospect	Text	A, B, C, R or Blank
16	Definite Match	Text	Y or Blank
17	Possible Match	Text	Y or Blank
18	More Research	Text	Y or Blank

Fields 2-9 will not be imported into the system, rather they are used to display information about constituents that were not found.

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Bentz Whaley Flessner

Return File Format

Field	Start	End	Length	Notes
PolkNum	1	7	7	Used to Verify return file format
j1	8	38	31	
Address	39	88	50	From RE
City	89	110	22	From RE
State	111	112	2	From RE
Zip	113	117	5	From RE
j2	118	127	10	
Id	128	140	13	Primary Key
j3	141	167	27	
j4	168	173	6	
OppSelect	174	175	2	Opportunity Select Rating; 01-20
WealthIndicator	176	177	2	00-99
LifeValues	178	179	2	01-13
j5	180	211	32	
First	212	226	15	From RE
Middle	227	241	15	From RE
Last	242	261	20	From RE
j6	262	760	499	
SelectProspect	761	761	1	Y, N or Blank
WealthMatch	762	762	1	1,2 or 3
InvestMatch	763	763	1	Y, N or Blank
Insider	764	764	1	Y, N or Blank
Document	765	765	1	Y, N or Blank

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Codes

Wealth Match

Code	Description
1	Well Endowed
2	Professional and Ivy League
3	Top Consumers

Life Value

Code	Description
1	Privileged Living
2	No Dominant Lifestyle
3	Gracious Living
4	Home Centered
5	Focus on Finance
6	Today's Technology
7	Sports and Nature
8	Self Improvement
9	Tuning In
10	Mature Interests
11	Helping Others

CDA/Investnet

Export File Format

Field	Start	Finish	Length
First Name	1	15	15
Middle Name	16	30	15
Last Name	31	50	20
Spouse First	51	65	15
Spouse Middle	66	80	15
Spouse Last	81	100	20
Maiden Name	101	120	20
Home Address	121	150	30
Home City	151	180	30
Home State	181	182	2
Home Zip Code	183	187	5
Business Address	188	217	30
Business Position	218	247	30
Business City	248	277	30
Business State	278	279	2
Business Zip Code	280	284	5
Social Security Number	285	293	9
CDA Internal Code	294	297	4
ID	298	308	11
Filler	309	309	1
Company Name	310	329	30
Birthdate	330	337	8
Year on File	338	339	2
CDA Internal Code	340	341	2
CDA Internal Code	342	343	2
Last Gift Date	344	351	8
Largest Gift Amount	352	361	10
Cumulative Gift Amount	362	371	10
Total Number of Gifts	372	373	2
Import Id	374	403	30
CRLF	404	405	2

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Return File Format for CDA/Investnet

Access Table	Access Table Field Name	Display Label	Length	Type	Start	Ending
Person Table	First Name	First Name	15	Text	1	15
Person Table	Middle Name	Middle Name	15	Text	16	30
Person Table	Last Name	Last Name	20	Text	31	50
Person Table	Spouse First Name	Spouse First Name	15	Text	51	65
Person Table	Spouse Middle Name	Spouse Middle Name	15	Text	66	80
Person Table	Spouse Last Name	Spouse Last Name	20	Text	81	100
Person Table	Maiden Last Name	Spouse Maiden Name	20	Text	101	120
Person Table	Address	Home Address	30	Text	121	150
Person Table	City	City	30	Text	151	170
Person Table	State	State	2	Text	171	172
Person Table	Zipcode	Zip	5	Text	173	177
Person Table	Business Address	Business Address	30	Text	178	207
Person Table	Business Title	Business Title	30	Text	208	237
Person Table	Business City	Business City	30	Text	238	267
Person Table	Business State	Business State	2	Text	268	269
Person Table	Busines Zipcode	Business Zip	5	Text	270	274
Master Table	Social Security Number	Social Security Number	9	Text	275	283
Master Table	Code-1	Investnet Client Code	4	Text	284	287
Person Table	Donor Number	Client ID	11	Text	288	298
Person Table	Business Name	Business Name	30	Text	299	328
Person Table	Report Number	Report #	2	Text	329	330
Person Table*	Total Market Value	Market Value All Stocks	8	Text	331	338
Real Estate Master Table	Total Value of Properties (low)	Estimated Market Value of Properties (low)	8	Text	339	346
Real Estate Master Table	Total Value of Properties (high)	Estimated Market Value of Properties (high)	8	Text	347	354
Person Table	Total Net Value of Options	Net Value Options	8	Text	355	362

*If Rept 1 available, disregard any Rept 2
Coding Level can be one of four values: H (Household), B (Block Group), Z (Zip Code) or N (Not Coded

Return File Format for CDA/Investnet (cont.)

Access Table	Access Table Field Name	Display Label	Length	Type	Start	End
Person Table	Total Past Stock Sales	Total Past Stock Sales	8	Text	363	370
Person Table	Total Dividends	Estimated Total Devidends	8	Text	371	378
Person Table	Total Market Value + Total Value of Properties (low) + Total Net Value of Options +Total Past Stock Sales + Total Dividend	Grand Total Known Assets (Low)	10	Text	379	388
Person Table	Total Market Value + Total Value of Properties (high) + Total Net Value of Options +Total Past Stock Sales + Total Dividend	Grand Total Known Assets (High)	10	Text	389	398
Person Table	Total Accessed Value	Assessed Value	8	Text	399	406
Person Table	Multiple Property Number	# Properties on Record	2	Text	407	408
Person Table	Net Worth Code	Net Worth Code	2	Text	409	410
Person Table	Coding Level*	Net Worth Coding Level	1	Text	411	411
Age Master	Date of Birth	Investnet Birthdate	6	Text	412	417
Real Estate Master Table	Spouse Birthdate	Investnet Spouse Birthdate	6	Text	418	423
Real Estate Master Table	Incidence of children	Minor Children?	1	Text	424	424

Coding Level can be one of four values: H (Household), B (Block Group), Z (Zip Code) or N (Not Coded

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Return File Format for CDA/Investnet (cont.)

Access Table	Access Table Field Name	Display Label	Length	Type	Start	End
SEC/Exec Sum	Master Table Total Number of Stock Gifts	Total Number	4	Text	369	372
SEC/Exec Sum	Master Table Total Value of Stock Gifts	Total Value of Stock Gifts	8	Text	373	380
RE	Real Estate Sales Amount	Purchase Price	8	Text	381	388
RE	Real Estate Home Value Lower	Estimated Home Range (lower, in thousands)	4	Text	381	388
RE	Real Estate Home Value Upper	Estimated Home Range (upper, in thousands)	4	Text	393	396
RE	Real Estate Master Table	Spouse Name	7	Text		

Coding Level can be one of four values: H (Household), B (Block Group), Z (Zip Code) or N (Not Coded

POW&R

Export File Format

Econometrics files have fixed-length fields surrounded by quotes, separated by commas.

Field	Start	End	Length
ID	1	20	20
Social Security Number	21	29	9
First Name	30	79	50
Middle Name	80	129	50
Last Name	130	179	50
Address	180	329	150
City	330	379	50
State	380	381	2
Zip	382	390	9
CRLF	391	392	2

Return File Format

POW&R files have fixed-length fields surrounded by quotes, separated by commas.

Field	Start	End	Length
Client Supplied First Name	1	14	14
Client Supplied Last Name	15	30	16
Client Supplied Address 2	31	60	30
Client Supplied Address 1	61	90	30
Client Supplied City	91	115	25
Client Supplied State	116	117	2
Client Supplied Zip	118	126	9
Client Supplied SSN	127	135	9
Client Supplied Phone	136	145	10
Filler	146	154	9
Match Code 1	155	156	2
Match Type 1	157	157	1
Match Code 2	158	159	2
Match Type 2	160	160	1
Match Code 3	161	162	2
Match Type 3	163	163	1
Match Code 4	164	165	2
Match Type 4	166	166	1
Match Code 5	167	168	2
Match Type 5	169	169	1
POW&R Phone	170	179	10
POW&R First Name	180	193	14
POW&R Last Name	194	218	25
POW&R Address 2	219	248	30
POW&R Address 1	249	278	30
POW&R City	279	303	25
POW&R State	304	305	2
POW&R Zip	306	314	9
Gender	315	315	1
Age	316	316	1
Contributor Type	317	317	1
Number of $100,000+ Portfolios	318	318	1
Child Present	319	319	1
Children Between Ages 0-5	320	320	1
Field (cont.)	**Length**	**Start**	**End**

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Children Between Ages 6-11	321	321	1
Children Between Ages 12-17	322	322	1
Business Name	323	352	30
Business Address 2	353	382	30
Business Address 1	383	412	30
Business City	437	413	25
Business State	438	439	2
Business Zip	440	448	9
Business Phone	449	458	10
Type of Business	459	488	30
Sales Volume	489	503	15
Number of Employees	504	512	9
Title of Executive	513	576	64
Biography	1500	577	2076
Shares Issued By	30	2077	2106
Shares Owned	9	2107	2115
Last Price Update	6	2116	2121
Value Of Shares	15	2122	2136
Foundation Name	60	2137	2196
Foundation Address 2	30	2197	2256
Foundation Address 1	30	2227	2256
Foundation City	25	2257	2281
Foundation State	2	2282	2283
Foundation Zip	9	2284	2292
Foundation Phone	10	2293	2302
Number of Grants	4	2303	2306
Total Amount of Grants	20	2307	2326
Time Period for Grants	20	2327	2346
Highest Grant Value	20	2347	2366
Lowest Grant Value	20	2367	2386
Amount of Gift	10	2397	2446
Gift Recipient	50	2397	2446
Year of Gift	4	2447	2450
Filler	20	2451	2470
Client Supplied ID	20	2471	2490
Filler	10	2491	2500
CRLF	2	2501	2502