

Prospects Configuration

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Prospects Configuration



Before you can manage prospect information, we recommend you set up configuration options. From *Prospects*, you can access these options under **Configuration**.

You use configuration options to set up *Prospects* for your users. These options can affect multiple areas in the program. For example, you can define plan outlines and opportunity amount ranges you want available for your *Prospects* users.

Your prospect research options are best set up by a site administrator, under the guidance of your Director of Development. How you configure these options should match the major giving workflow at your organization. As part of your prospect research set up, we recommend you first set up the following in *Administration*:

- Add your prospect researchers and fundraisers as application users and assign each application user to a constituent record. We also recommend you add the user's email address so you can send them prospect research email alerts.
- Assign your prospect researchers and fundraisers the appropriate security settings.
- Add the fundraiser system role to each of your application users who have any development/gift officer responsibilities in your organization.
- Add the prospect research system role to each of your application users who perform any wealth identification or qualification activities.
- Set up email alerts for the prospect research notifications you require. Email alerts can help move prospects along the development process and not get stuck waiting for research or for a development officer to qualify and cultivate. You may want to start with a few basic ones and add over time as you customize the workflow to your organization's needs.

Capacity Formula Management

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

For example, you can choose to create a new capacity formula for geographies with expensive real estate. In cities like New York City, Washington, DC, and Los Angeles, the real estate prices in the metropolitan area are much higher than other cities in the United States and can inflate wealth values. Some organizations choose to discount real estate to gain a better perspective on capacity to give.

From the Capacity Formula Management page, you can add a new capacity formula, edit an existing formula, and choose which formula to use as the system default. You can also apply a formula to a record, group of records, or a research list.

To access the Capacity Formula Management page, from the *Prospects* page, under **Configuration**, click **Capacity formula management**.

> Set as Default

You can select any formula defined in the system to use as the default for new constituent records.

While you can change the default at any time, only one formula can be used as the default.

You can also choose to make a formula the default when adding new formulas or editing existing formulas.

➤ Delete a Formula

You can delete capacity formulas from the Capacity Formula Management page. However, you can delete only those formulas to which you have access, and the default formula cannot be deleted. Formulas currently assigned to prospect records also cannot be deleted.

Create and Edit a Capacity Formula

In addition to the default formula provided with the system, you can create new formulas for calculating a prospect's estimated wealth, major giving capacity, and major giving capacity value. You create a new capacity formula from the Capacity Formula Management page.

Note: Customized or new capacity formulas only apply to individual prospects. Household and group prospects use the default capacity formula.

The add and edit capacity formula screens consist of the Name/Description, Assets, Giving, and Calculations tabs. Using these tabs you create or edit a new wealth capacity formula.

➤ Add a Capacity Formula

1. From the Capacity Formula Management page, select **Add**. The Add capacity formula screen appears.

Add capacity formula

Name/Description | Assets | Giving | Calculations

Name:

Description:

Set this as the default formula

Other users may modify this formula

Apply formula to

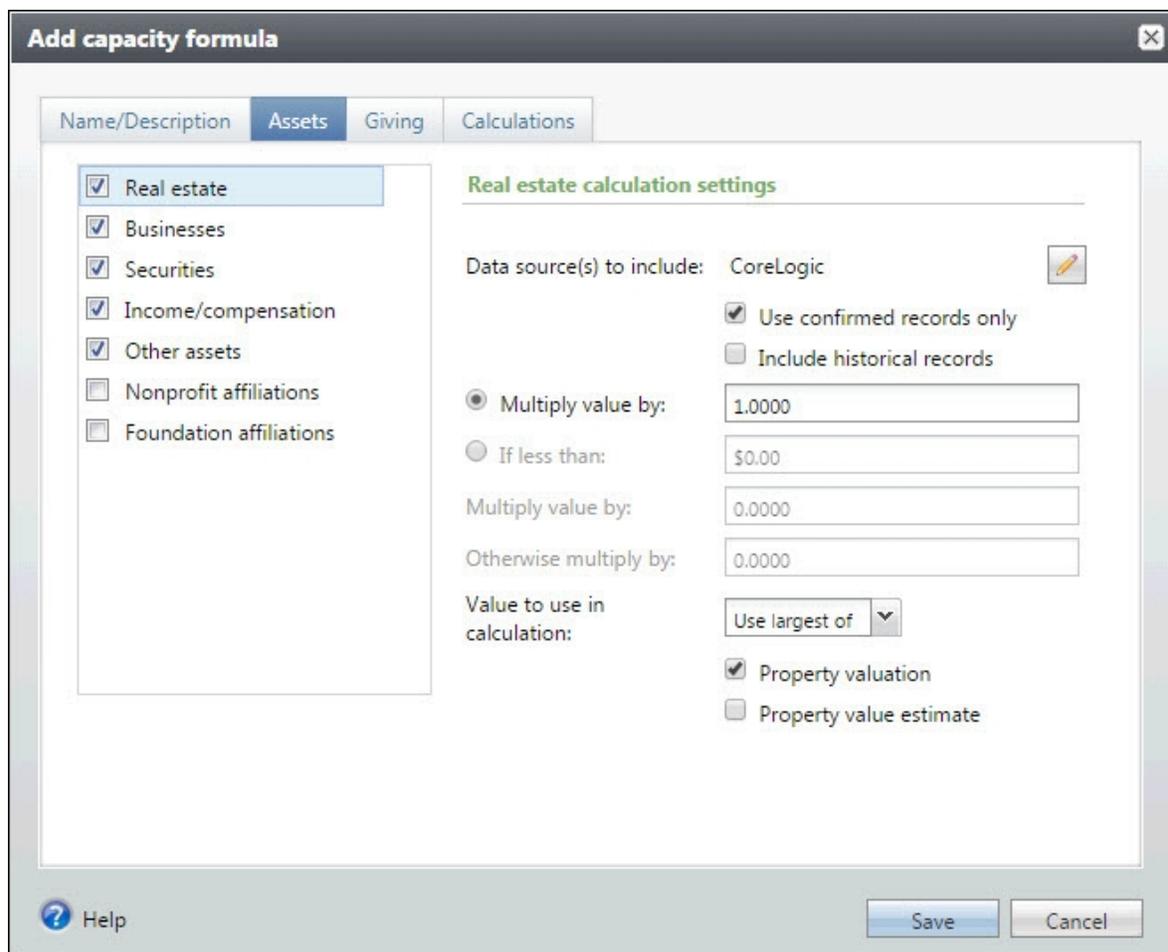
Constituent:

Research list:

Selection:

Help

2. Enter a name and description for the new formula. The name and description you enter displays on the Wealth Capacity Formula Management page.
3. To set this formula as the default, select the checkbox. The default formula is applied to new constituent records.
4. If you want to allow other users to edit this formula, select **Other users may modify this formula** checkbox.
 - To apply the formula to an individual constituent, select **Individual constituent**. Click the search icon to locate and select the constituent.
 - To apply the formula to a research list, select **Research List**. Click the search icon to locate and select the research list. You can apply a formula only to the lists to which you have access.
 - To apply the formula to a group of records, select **Selection**. Using the icons in the field, you can search for a selection, edit an existing selection, or create a new selection.
5. Select the Assets tab.



6. In the **Select asset types to include** frame, select the assets you want to include in the formula. The calculation settings on the right side of the screen change depending on the asset you highlight.

For each of the calculation settings, select which data sources to include, whether to include only confirmed sources, and then customize the mathematical formula. For example, you can multiply a prospect's wealth value by greater or less than 1.000 to increase or decrease an aspect of wealth. For expensive metropolitan areas, you could decrease the value of real estate property value if it skews a prospect's capacity to give.

Note: Values of "0" are not included in calculations when you select "Use smallest of" or "Use average of" as your asset calculation method.

- Real estate – By default, historical records are not included in the capacity formula, but you can choose to include if it's important to your organization's calculations. Also, for the property value to use in the calculation, you can include the largest property owned by the prospect, the smallest, or an average of all properties. Then, choose whether to use the property's valuation or valuation estimate.
- Business Ownership – For the business value to use in the calculation, you can choose to

use the ownership value or the valuation.

- Securities – For the securities value, you can choose to use the direct holdings value, indirect holdings value, or total value.
- Income/compensation – Select which aspects of income or compensation should be included in the calculation.
- Other assets – If your organization has custom assets, select which ones to include in the calculation.
- Nonprofit affiliations – Select whether to include involvement with a nonprofit as a source of wealth for prospects.
- Foundation affiliations – Select whether to include involvement with a foundation as a source of wealth for prospects.

7. Select the Giving tab.

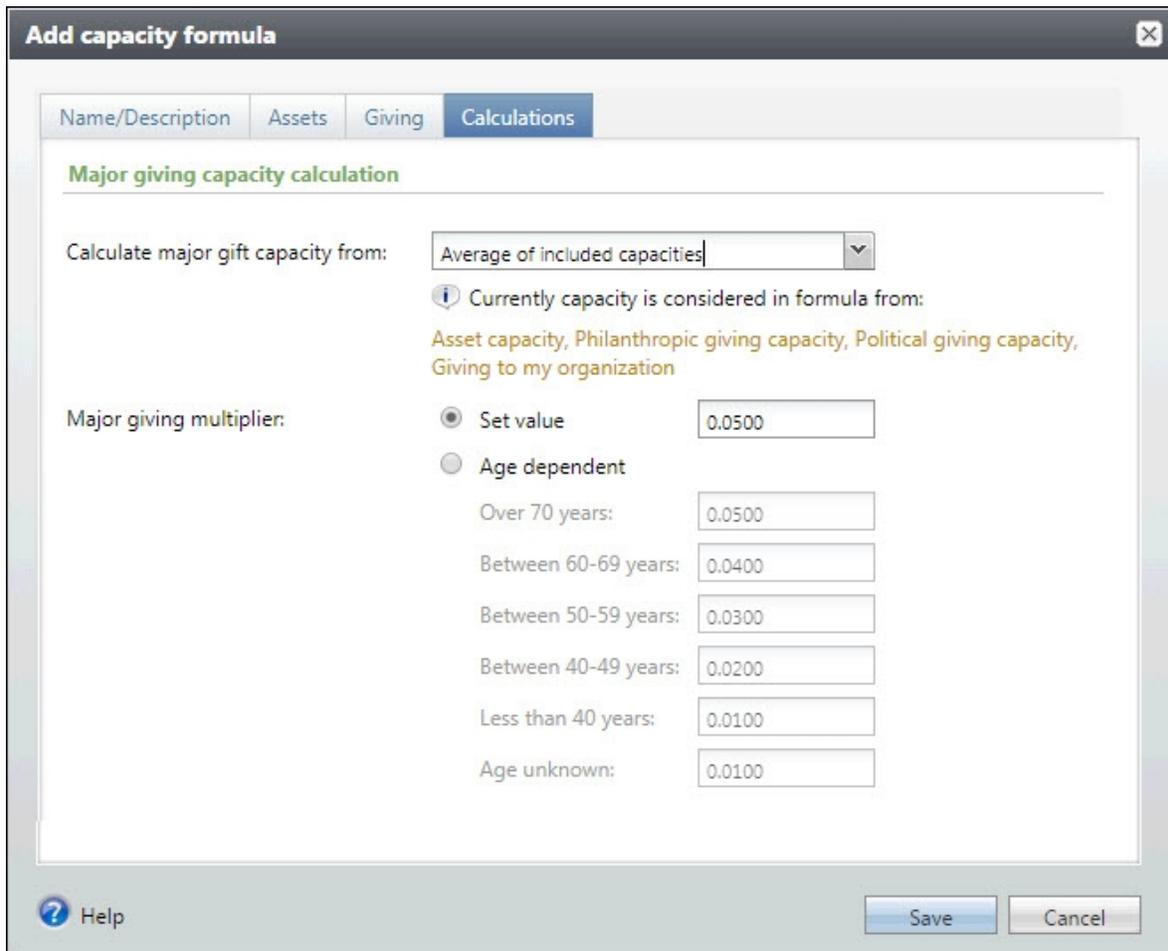
The screenshot shows the 'Add capacity formula' dialog box with the 'Giving' tab selected. The dialog has four tabs: 'Name/Description', 'Assets', 'Giving', and 'Calculations'. The 'Giving' tab is highlighted with a red box. Below the tabs, the section 'Giving options to include in capacity' contains three checked items: 'Philanthropic gifts', 'Political donations', and 'Giving to my organization'. To the right, the 'Philanthropic gifts calculation settings' section is visible. It includes a 'Data source(s) to include:' field with 'NOZA, Inc.' and an edit icon. Below this is a checked checkbox for 'Use confirmed records only'. There are three radio button options: 'Multiply value by:' (selected) with a text box containing '1.0000', 'If less than:' with a text box containing '\$0.00', and 'Multiply value by:' with a text box containing '0.0000'. Below these is 'Otherwise multiply by:' with a text box containing '0.0000'. At the bottom of the settings is 'Value to use in calculation:' with a dropdown menu set to 'Largest low range value'. At the bottom of the dialog are 'Help', 'Save', and 'Cancel' buttons.

8. Under **Giving options to include in capacity**, select the giving types you want to include in the formula. The calculation settings on the right side of the screen change depending on the giving type you highlight.
9. For the **Philanthropic gifts** and **Political donations** settings, select which data sources to

include, whether to include only confirmed sources, and then customize the mathematical formula. For the **Giving to my organization** setting, select the value to use in the calculation, then customize the mathematical formula. For example, you can multiply a prospect's wealth value by greater or less than 1.000 to increase or decrease an aspect of wealth.

- Philanthropic gifts – Uses giving data from NOZA. For the value to use in the calculation, you can choose to use the largest low range value, largest high range value, sum of past 3 years low range giving, sum of past 3 years high range giving, sum of past 5 years low range giving, or sum of past 5 years high range giving.
- Political donations – Uses giving data from Federal Election Commission (FEC). For the value to use in the calculation, you can choose to use the largest one donation value, sum of last 4 years of donations, or sum of last 8 years of donations.
- Giving to my organization – Uses giving data synchronized from Raiser's Edge or manually entered in the Giving to my Organization section on the Wealth and Ratings page. For the value to use in the calculation, you can choose to use the average giving, largest gift, last gift, or total gifts to your organization.

10. Select the Calculations tab.



11. Select a calculation method. Your choices include **Largest of included capacities** and **Average**

of included capacities. The capacity estimation is determined from your selection.

Note: Values of "0" are not included in calculations when you select "Average of included capacities" as your giving calculation method.

12. In the **Major giving multiplier** fields, you can enter a fixed percentage to use for all prospects, or base the percentage on age. This percentage is applied to a constituent's estimated wealth value to determine major giving capacity.
13. Click **Save**. The formula is saved and stored on the Capacity Formula Management page.

➤ Edit a Capacity Formula

From the Capacity Formula Management page, click the down arrows next to the formula name to access the formula's task bar. Click **Edit**. The Edit capacity formula screen appears.

You can edit only the wealth capacity formulas to which you have access. The fields on this screen are the same as the Add capacity formula screen.

Apply a Capacity Formula

You have several options when you choose to apply a formula to a record or group of records. For example, you can apply a formula to a single constituent or a group of constituents. When applying a formula to a group of records, you can edit or create a new selection from ad-hoc query to select the records. You can also apply a formula to any Research List to which you have access.

1. From the Capacity Formula Management page, select the formula you want to apply and click **Apply formula**. The Apply wealth capacity formula screen appears.
 - To apply the formula to an individual constituent, mark **Individual constituent**. Click the search icon to locate the constituent.
 - To apply the formula to a Research List, mark **Research List**. Click the search icon to locate the Research List. You can apply a formula only to the lists to which you have access.
 - To apply the formula to a group of records, mark **Selection**. Using the icons in the field, you can search for selection, edit an existing selection, or create a new selection.
2. Click **Save**. The formula is saved and stored on the Capacity Formula Management page.

Constituent Group Types

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

Type	Description	Group may be a donor	Include group member r...	Active
Giving circle	Giving circle	✓	✓	Yes

Under **Constituent group types**, your constituent group types appear. For each type, you can view its description, whether the group may be a donor, whether to include gifts from members as revenue from the group, and whether the group type is active. To display inactive group types, click **Filter**, select **Include inactive** and click **Apply**.

From the grid, you can add and manage your organization's constituent group types.

Add Constituent Group Types

Before you add a constituent group record to the database, you must define its group type, such as giving circle or family foundation.

➤ Add a constituent group type

1. From *Constituents*, click **Constituent group types** under **Configuration**. The Constituent Group Types page appears.
2. Under **Constituent group types**, click **Add**. The Add a constituent group type screen appears.
3. Enter a unique name and a description to help identify the group type.
4. Select whether groups of this type can be donors and whether to include charitable revenue received from the group's members in the overall giving summary of the group. If you select **Include member giving in group giving summaries**, the program includes the revenue received from the members of the group in the giving views and total giving amount of the group.
5. Click **Save**. You return to the Constituent Group Types page.

Edit Constituent Group Types

After you add a constituent group type, you can edit its properties. For example, you can such whether to include gifts from group members in the overall giving summaries of the group.

Delete Constituent Group Types

After you add a constituent group type, you can delete it as necessary, such as when your organization no longer uses it. You cannot delete a group type when it is assigned to a constituent group.

Tip: To retain a history of the constituent group type in your database but still prevent its use, mark the group type as inactive rather than delete the record.

Mark Constituent Group Types as Inactive or Active

To retain information about a constituent group type that your organization no longer uses, you can make the group type inactive in the database.

After you mark a constituent as inactive, you can mark the constituent as active again if necessary.

Confidence Ratings

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

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

★ [star] icon = **WealthPoint** used a piece of information in the recursive matching process to help identify a better match. For example, it locates a good Securities record match. It then uses the name of the company included in that record to make a better business ownership record match.

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

Rating Description

5	Confirmed record – Any record confirmed in the application receives a 5 rating. You designate a record "Confirmed" by selecting the record and clicking the Confirm button. When you confirm a wealth information record, the Confidence number changes to "5" and a green check mark appears to the left of the selected entry.
4	Very high confidence
3	High confidence
2	Moderate confidence
1	Low confidence
0	Rejected record – Any record rejected in the application receives a 0 rating. You reject a record when you know for certain that the data does not belong to your constituent. You designate a record "Rejected" by selecting the record and clicking the Reject button. When you reject a wealth information record, the Confidence number changes to "0" and a red icon appears to the left of the selected entry.

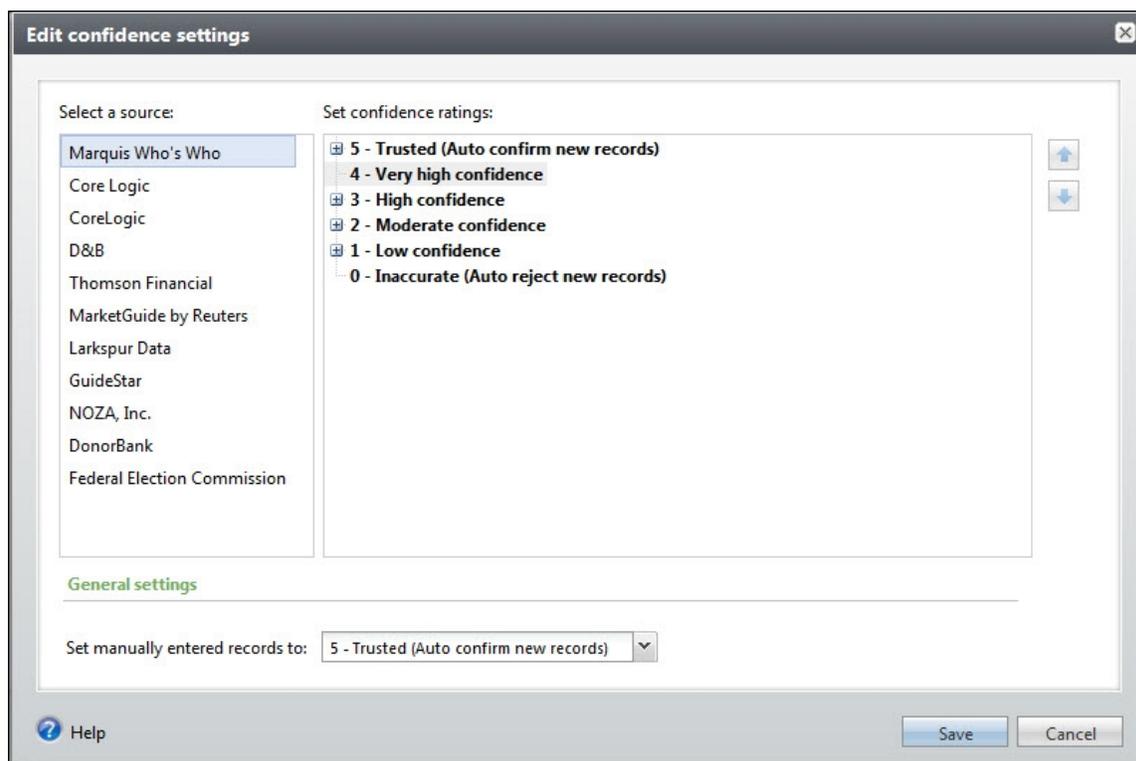
➤ Edit a Confidence Rating

Although the application includes default confidence settings, your organization may find the need to

customize the confidence settings to better meet your needs. When you edit confidence settings, you change the criteria used to determine the ratings number.

You can edit the confidence ratings for each source used on the Wealth and Ratings record.

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



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

First Name and Gender Defaults

The program includes thousands of first names with default gender assignments in place. To view and manage the first name gender defaults, such as to add a name or change a gender assignment, from *Constituents*, click **First names** under **Configuration**.

➤ Add a first name and default gender

1. From *Constituents*, click **First names** under **Configuration**. The First Names page appears.
2. Under **First names**, click **Add**. The Add a first name screen appears.
3. Enter the first name for which you want to assign a gender default.
4. In the **Gender** field, select the gender to assign by default when a user enters the name.
5. Click **Save**. You return to the First Names page.

Prospect Research Report Templates

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

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

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

➤ Add a prospect research report template

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

➤ Copy a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to copy.
3. Click **Copy**. The Copy prospect research report template screen appears.

4. Change the template name and description.
5. Make any other necessary changes.
6. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report**.

➤ Set a prospect research report default template

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

Reason Codes

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

Add Reason Codes

With reason codes, your organization can standardize the reasons users make changes to information and records. Before users can select a reason code, you must add it to your database. Reason codes can be up to 10 characters in length.

➤ Add a reason code

1. From *Prospects*, click **Reason codes** under **Configuration**. The Reason Codes page appears.
2. Click **Add**. The Add a reason code screen appears.
3. In the **Reason code** field, enter an alphanumeric code to identify the reason for the change. For example, for a change to correct a data entry error, enter ERR.
4. In the **Description** field, enter a description or explanation of when to select the reason code.
5. Click **Save**. You return to the Reason Codes page.

Edit a Reason Code

After you add a reason code, you can edit its name or description as necessary, such as to correct a typographical error.

➤ How to edit a reason code

1. From *Prospects*, click **Reason codes** under **Configuration**. The Reason Codes page appears.

2. Select the reason code to edit.
3. Click **Edit**. The Edit a reason code screen appears.
4. Edit the name or description of the code as necessary.
5. Click **Save**. You return to the Reason Codes page.

Relationship Settings

On the Relationship Settings page, you can manage your constituent relationship types and configure settings for corporate relationships used for organization constituents.

To access the Relationship Settings page, from *Constituents*, click **Relationship settings** under **Configuration**.

To help you manage your relationship types and settings, the Relationship Settings page contains multiple tabs.

Relationship Types

On the Relationship Types tab of the Relationship Settings page, you can manage the relationship types used with your constituents. For example, your organization may specify that a relationship type of Brother applies to only the male gender, or that Sister applies only to the female gender. You can also specify the types of constituents the relationship type applies, along with the types of constituents who can have relationships of this type. For example, a relationship type of Employee might apply to only individuals—that is, only individual constituents can be considered as employees.

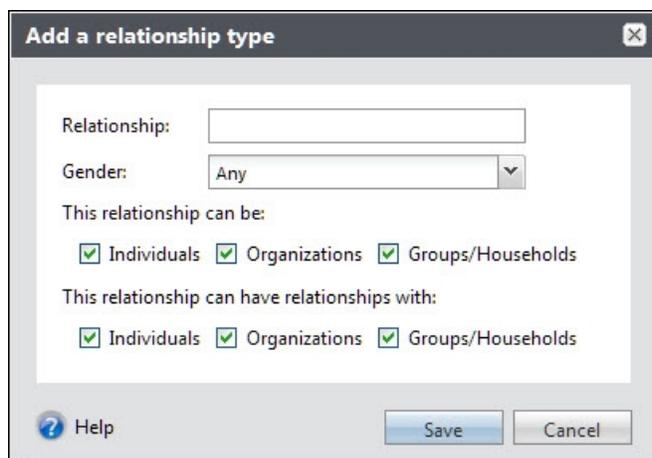
When you add relationships to constituents, you specify the reciprocal relationship. If you add a relationship type of Father to a constituent, the reciprocal relationship might be Son or Daughter. The most common relationship pairs become the default reciprocal relationships. If your organization has more father/daughter pairs than father/son pairs, the default reciprocal relationship when you add a relationship type of Father is Daughter. However, you can still select Son or any other value for the reciprocal relationship.

Add Relationship Types

From the Relationship Settings page, you can add relationship types. When you add a relationship type, you also select the gender and types of constituents to which it applies.

➤ Add a relationship type

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Relationship Types tab, click **Add**. The Add a relationship type screen appears.



3. In the **Relationship** field, enter a unique name for the relationship type such as Brother or Employee.
4. Select the gender to which the relationship type applies. If the relationship type applies to either gender, select "Any."
5. Under **This relationship can be**, select the types of constituents who can have a relationship of this type. For example, a relationship type of Employee might apply only to individual constituents, as only individuals are considered employees.
6. Under **This relationship can have relationships with**, select the types of constituents who can have a relationships with constituents of this relationship type. For example, a relationship type of Employee relates to both individuals and organizations, as both may be employers and have employees.
7. Click **Save**. You return to the Relationship Settings page.

Edit Relationship Types

From the Relationship Settings page, you can edit relationship types as needed. For example, you can adjust the gender or constituent types to which the relationship type applies.

➤ Edit a relationship type

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Relationship Types tab, select the relationship type and click **Edit**. The Edit relationship type screen appears.
3. Edit the information as necessary.
4. Click **Save**. You return to the Relationship Settings page.

Mark Relationship Types Active or Inactive

Rather than delete an relationship type, you can mark it as inactive. The relationship type remains in your database, but users can no longer apply it to constituent relationships. To mark a relationship type as inactive, select it on the Relationship Types tab on the Relationship Settings page and click **Mark**

inactive. To reactivate an inactive relationship type, select it under **Relationship types** and click **Mark active**.

To display inactive relationship types on the Relationship Types page, click **Filter**, select **Include inactive**, and click **Apply**.

Delete Relationship Types

From the Relationship Settings page, you can delete a relationship type, such as if your organization no longer uses it.

Tip: Rather than delete a relationship type, you can mark it as inactive. Inactive relationship types remain in your database, but users cannot apply them to constituent relationships. For information about how to mark a relationship type as inactive, see [Mark Relationship Types Active or Inactive on page 14](#)

➤ Delete a relationship type

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Relationship Types tab, select the relationship type and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Relationship Settings page.

Corporate Relationships

From the Corporate Relationships tab on the Relationship Settings page, you can configure relationships for parent, intermediate, and subsidiary organizations. You can also specify corporate peer and employee relationships.

An organization constituent's employee information appears in corporate summaries for that organization. Corporate summaries include general data, giving history, and employee information for an organization. On the Corporate Information page for an organization constituent, you can view corporate summaries on the Revenue, Employee Giving, and Prospect Plans tabs. You can also view corporate peer organizations on the Corporate Information page.

To ensure that an organization constituent's corporate data accurately includes all employee totals, you must specify the employee relationship types to include in the totals. For example, you can specify that records with relationship types of Employee and Owner count as employees for an organization. When you view corporate summaries, all employees and owners then count as employees and appear in all employee data for the organization.

➤ Configure corporate relationships

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Corporate Relationships tab, click **Edit**. The Configure corporate relationships screen appears.

Configure corporate relationships

Relationships with parent organizations

Parent organization is the:
 Parent Corporation

Subsidiary organization is the:
 Subsidiary

Create relationships between subsidiary and intermediate organizations

Intermediate parent organization is the:

Subsidiary organization is the:

Create relationship between subsidiary and top organization

Top parent organization is the:

Subsidiary organization is the:

Set end dates for relationships between subsidiaries and intermediate/top parents when no longer valid

Corporate relationship types

Corporate peers:
 Relationship types

Employee relationships:
 Relationship types
 Employee

Help Save Cancel

3. In the **Parent organization is the** field, select the default relationship type that the parent organization represents in the relationship, such as Parent Corporation.
4. In the **Subsidiary organization is the** field, select the default relationship type that the subsidiary organization represents in the relationship, such as Subsidiary.
5. Select whether to automatically create relationships between subsidiary organizations and their intermediate parent organizations.
6. If you select **Create relationships between subsidiary and intermediate organizations**, select the relationship types to assign the intermediate parent and subsidiary organizations. The program then creates relationships between the subsidiary organization and all organizations above it.
7. Select whether to automatically create relationships between subsidiary organizations and their top parent organizations.
8. If you select **Create relationship between subsidiary and top organization**, select the relationship types to apply to the top parent and subsidiary organizations. A relationship is then created between the bottom organization and the top organization.
9. Select whether to automatically set end dates when relationships between subsidiary and parent relationships are no longer valid, such as due to dissolution.
10. Under **Corporate peers**, select the relationship types for peer organizations.
11. Corporate peers are other organizations with information to include on the Corporate Information page, such as corporate foundations. Corporate peers also appear on the Extended

Network page of the organization.

12. Under **Employee relationships**, select the relationship types for employees. Organization constituents with these relationship types appear in employee data compiled in corporate summaries.
13. Click **Save**. You return to the Relationship Settings page.

Configure Corporate Relationships Screen

The table below explains the items on the Configure corporate relationships screen. For information about how to access this screen, see [Corporate Relationships on page 15](#).

Screen Item	Description
Parent organization is the	Select the default relationship type that the parent organization represents in the relationship, such as Parent Corporation.
Subsidiary organization is the	Select the default relationship type that the subsidiary organization represents in the relationship, such as Subsidiary.
Create relationships between subsidiary and intermediate organizations	To automatically create relationships between subsidiary organization and their intermediate parent organizations, select this checkbox and select the relationship types to assign to each. The program then creates relationships between a subsidiary organization and all organizations above it.
Create relationship between subsidiary and top organization	To automatically create relationships between subsidiary organizations and their top parent organizations, select this checkbox and select the relationship types to assign to each. The program then creates relationships between a subsidiary organization and its top parent organization.
Set end dates for relationships between subsidiaries and intermediate/top parents when no longer valid	To automatically create end dates when relationships between subsidiary and parent organizations are no longer valid, select this checkbox.
Corporate peers	Select the relationship types to apply to peer organizations. Corporate peers are other organizations whose information you want to include on the Corporate Information page, such as corporate foundations. Corporate peers also appear on the Extended Network page of the organization.
Employee relationships	Select the relationship types to apply to employees. Organizations constituents with these relationship types appear as employees in corporate summaries.

Add a Social Media Service

To manually add social media accounts for prospects and once confirmed, have the social media icon appear below the prospect's profile picture, you can add social media services. If you subscribe to the Social Media Finder service, you do not need to manually add a social media service. Whenever a new service returns from a WealthPoint screen, we automatically add the new social media service for you.

1. Click **Add**. The Add a social media service screen appears.
2. Enter the name of the social media or social networking service.
3. To include an icon for the service, click **Choose file** and select an image from your computer.

Note: Icons should be 16 pixels by 16 pixels.

4. Click **Save**. You return to the Social Media Services page. By default, the new service is active.

Edit a Social Media Service

You can edit the name and icon for a social media or social networking service.

1. From *Prospects*, under **Configuration**, click **Social media services**. The Social Media Services page appears.
2. Click the name of the social media service to update and on the action bar, click **Edit**. The Edit Social Media Screen appears.
3. You can update the service name, clear the icon, or choose a new icon for the service.
4. Click **Save**. You return to the Social Media Services page.

Wealth And Ratings Data

From the Wealth and Ratings Data page, you can review resolved and unresolved WealthPoint screenings, enable data refresh, and create WealthPoint search processes, and more!

You access the Wealth and Ratings Data page from the Prospects page, under **Configuration**, click **Wealth and ratings data**.

View Refreshed WealthPoint Data

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

For example, if the Dun & Bradstreet data is refreshed, all constituents whose records were updated with the new Dun & Bradstreet data display on the page, along with the date of the update, the source updated, wealth detail information, fields updated, and the old and new values.

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

- Dun & Bradstreet
- GuideStar - Nonprofit Associations
- GuideStar - Foundation Affiliations
- Thomson Reuters (Securities)
- Who's Who

You can filter the notifications included on the page based on the **Name**, **Date submitted**, or **User name**. Simply enter the information in the appropriate field included at the top of the grid and click **Apply**. To return to the default setting of all notifications, click **Reset**.

➤ Enable Data Refresh

If you click **Enable Data Refresh** under **Tasks** on the Wealth And Ratings Data page, every time **WealthPoint** updates Dun & Bradstreet, Guidestar NP or FA, Thomson Reuters, or Who's Who data your existing records are automatically updated. To help you keep track of refreshed records, the constituent name and other relevant information displays on the Wealth And Ratings Data page

➤ View Refreshed Constituent Record

From the Wealth And Ratings Data page on the WealthPoint Data Refresh tab, you can access the constituent record of any constituent included in a Data Refresh process.

To access the record, select the record in the **WealthPoint Data Refresh history** grid and click **Go to constituent**. The constituent record displays. Click **Back** to return to the Wealth And Ratings Data page.

View List of WealthPoint Screenings

The WealthPoint Screening History tab on the Wealth And Ratings Data page houses a list of all screens. The top section of the tab - the **WealthPoint unresolved screenings** grid - displays any incomplete or failed searches.

The **WealthPoint resolved screenings** grid displays all searches, single and groups, that have completed or failed. From this grid, you can filter and reorder items listed and open selected constituents.

To access the Wealth And Ratings Data page, from the Prospects page, under **Configuration** click **Wealth And Ratings Data** in the explorer bar. The Wealth And Ratings Data page appears.

Retrieve WealthPoint Screening Results

Rarely, WealthPoint screening results stay in the unresolved screenings state. When that happens, you can ask the program to retrieve the results to complete the screening process.

To resolve, from the WealthPoint Screening History tab on the Wealth And Ratings Data page, track the search process and watch for the "Results ready" status to appear in the **WealthPoint unresolved screenings** grid, confirming that your results are ready. You can then access the results by selecting the item in the grid and clicking **Retrieve results**. After you retrieve the results, the item is moved to the bottom half of the page into the **WealthPoint resolved screenings** grid.

Cancel Unresolved Screenings

If while waiting for a screening process to complete, you want to cancel the screening process, in the **WealthPoint unresolved screenings** grid on the WealthPoint Screening History tab, select the process you want to cancel and click **Cancel**. The process is stopped and removed from the grid.

Manage WealthPoint Screenings

The WealthPoint Screenings tab in **Wealth And Ratings Data** houses all your **WealthPoint** screening processing tools. From here, you can create a screening process, edit or delete existing screening processes, generate a *Windows* scripting file, schedule processing jobs, run a job process, and view job processing records.

Create or Edit a WealthPoint Screening Process

A screening process defines what and how information is extracted from **WealthPoint**. Before you create a process, you must create a Research List and include all prospects for which you want **WealthPoint** information updated. Using the group of prospects saves you a great deal of time over updating prospects one at a time. The group can include as many prospects as necessary. If you are updating a large number of prospects, you may want to schedule the job for a time when no one is working in your system. You can also create a job schedule to run at a fixed interval. The Wealth And Ratings Data page houses a list of all executed screenings. It displays date, status, user, and prospect information.

You can also delete a process from the WealthPoint screening process screen by clicking the **Delete process** option.

➤ Create a WealthPoint screening process

1. From the Wealth And Ratings Data page, select the WealthPoint Screenings tab.
2. Click **Add**. The Add WealthPoint screening process screen appears.
3. Name the process you are creating. The name displays in the **WealthPoint screening process** grid on the WealthPoint Screenings tab.
4. Describe the screening process you are creating. This helps users identify the process from the **WealthPoint screening process** grid.
5. Select the research list you want to include in the update process.
6. Click **Save**. The process is saved and stored on the WealthPoint Screenings tab.
7. To update the records, from the WealthPoint Screenings tab, select the import process you want to run and click **Start Process**.

➤ Edit an existing WealthPoint search process

1. From the Wealth And Ratings Data page, select the WealthPoint Screenings tab.
2. For a screening process row, click **Edit**. Edit WealthPoint screening process screen appears.
3. Edit the information, and click **Save**.
4. To update the records, from the WealthPoint Screenings tab, select the process you want to run and click **Start Process**. The WealthPoint screening process screen appears. From this screen, you can view the updating process and confirm when the process is complete and if it was successful. This screen also stores details about your WealthPoint screening processes.

Track Subscription Status

From *Prospects*, you can see the current status of your **ResearchPoint** subscription including subscription type, group screenings remaining, and subscription renewal date.

To access the subscription screen, from *Prospects*, under Configuration, click **Wealth and ratings data**. Under **Tasks** on the Wealth And Ratings Data page, click **Subscription status**. You must be logged into **WealthPoint** before you can access the subscription information. To log into WealthPoint, you need to [Edit the WealthPoint URL on page 21](#).

Edit the WealthPoint URL

If you need to change the network location where you connect to **WealthPoint**, you can do so from the Wealth and Ratings Data page.

From *Prospects*, under Configuration, click **Wealth and ratings data**. From the Wealth and Ratings Data page, under **Tasks**, click **Edit WealthPoint URL**. On the Edit WealthPoint URL screen, enter the location of the www file used to connect to **WealthPoint** and click **Save**. You return to the Wealth and Ratings Data page.

Register with WealthPoint

The first time you use a database with **WealthPoint**, you or your site administrator must register the database. This is a one-time procedure. Once the database is registered the registration link disappears. To register, from *Prospects*, under Configuration, click **Wealth and ratings data**. Under **Tasks**, click the **Register with WealthPoint** link.

Fundraiser On the Go

Fundraiser on the Go is a web-based application fundraisers can use to complete prospect plan tasks from their mobile device. While fundraisers are out of the office, they can use the app to view a prospect's information to prepare for a meeting — afterwards, they can update their notes and next steps in the plan. Information entered in the app tracks back to prospect records in the database.

Note: Because *Fundraiser on the Go* is a responsive web application, it can be accessed from a web browser on any type of device.

Copy the Fundraiser on the Go URL

Note: Only application users in the Fundraiser on the Go system role can copy the *Fundraiser on the Go* URL.

From *Prospects*, under **Configuration**, select **Fundraiser on the Go**. On the Fundraiser on the Go URL screen, you can copy the URL to send to fundraisers who can bookmark it on their mobile devices for quick and easy access.



Access Fundraiser on the Go

Note: To use *Fundraiser on the Go*, users must be linked to a constituent who is an active fundraiser and assigned to the Fundraiser on the Go system role.

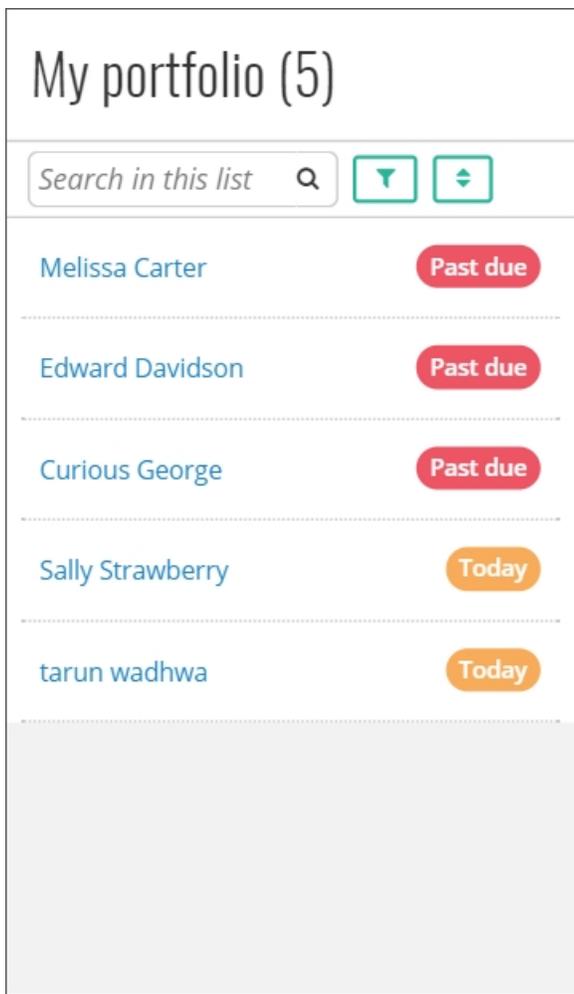
When you access the URL on a device, you must first enter your credentials on the Blackbaud ID sign-in screen.

Once you're logged in, you have 2 options:

My portfolio tab: View a list of prospects assigned to you. You can view their current status, filter the list, and search for a specific prospect.

Search All tab: Search for any prospect in the database. You can search by name, city, state, zip code, country, or phone number.

Note: The prospect list does not include deceased prospects or those linked to inactive prospect plans. In addition, the list does not include any constituents for which you are a relationship manager — you must be their prospect manager.



When you open a prospect, you can:

- View the prospect's profile picture and details such as contact information, spouse name, and notes.
- View the last five constituent interactions and major giving plan steps.
- Add or edit constituent interactions and plan steps for existing plans. **Note:** You can't add new plans from the app.
- View the last five gifts and recognition credits.
- File a contact report when you complete a step or an interaction.
- View up to five smart fields for the prospect.
- Click the prospect's address to get directions using *Google Maps*.
- On mobile devices:
 - Use voice-to-text to quickly enter comments about your visit.
 - Use the app's buttons to call, text, or email the prospect using contact information from

their record.

Mr. Edward Davidson

View addresses

Sandy Watson
Prospect manager

Next step Past due

Meeting - Meet up

Major Gift Ask

Recent steps/interactio...

Upcoming steps/intera...

Recent gifts/credits

File contact report

Show Revenue Smart Fields

You can view revenue smart fields in *Fundraiser on the Go*, under **Summary information**. To configure smart fields to display, from *Administration*, select **Smart fields**, under **Data**. On the add or edit screen for a revenue smart field, select **Show this smart field in Fundraiser on the Go**. You can configure a maximum of five smart fields for *Fundraiser on the Go*.

Note: You must have the appropriate security rights for smart fields to view them in *Fundraiser on the Go*.

ResearchPoint in Altru 4.7 Prospects Configuration US

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