Prospect Research Guide

09/30/2021Blackbaud CRM 4.0 Prospect Research US

Prospects-2016

Contents

Introduction to Prospect Research

Major Giving, including prospect research, in CRM enables you to more fully develop the relationships you have with constituents who have the potential to make a large donation or planned gift to your organization. The tools in this guide are meant to help you track and build wealth profiles of constituents who you identify as those with the capacity and inclination to donate toward your causes.

As you progress through the stages of prospect research, align the major giving workflow you require at your organization to the robust prospect research tools we integrate alongside your fundraising and constituent relationship tasks.

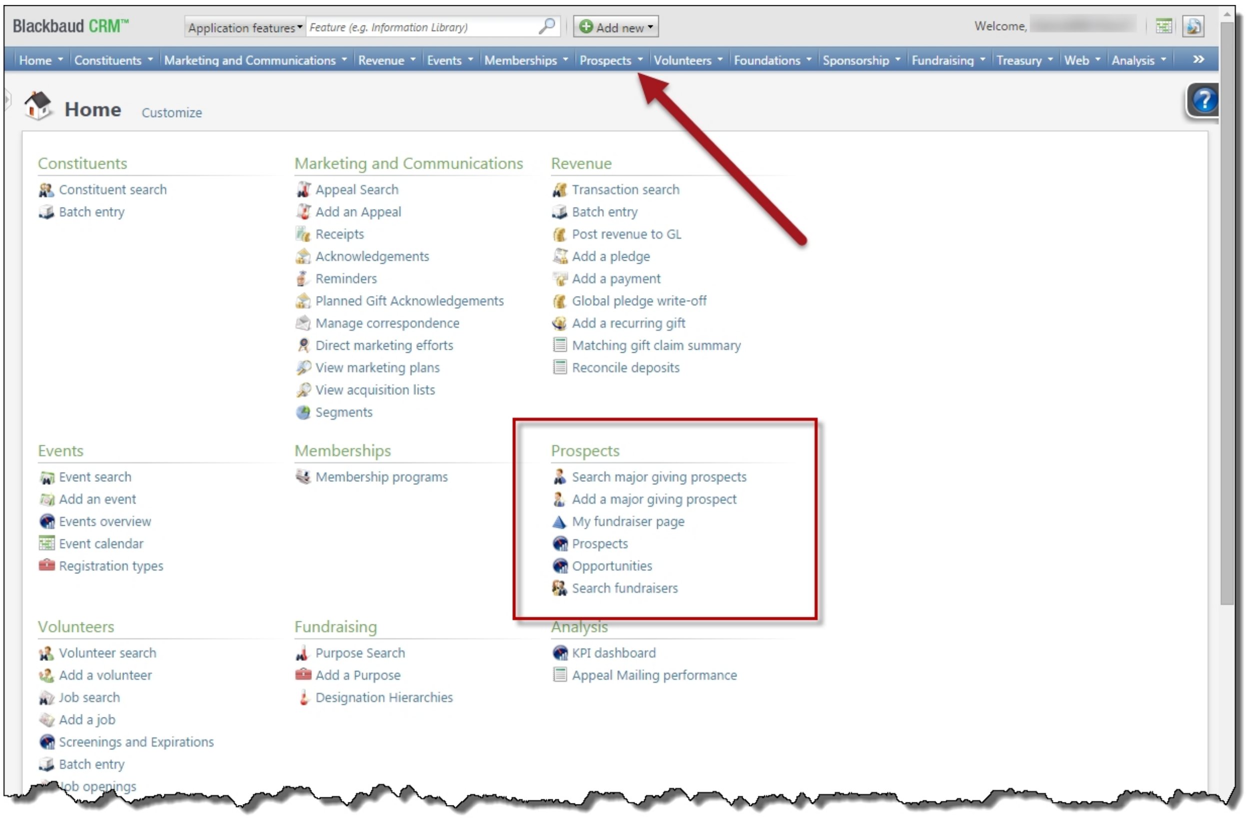
You can follow along with this guide, or select a chapter below:

- Prospects Configuration on page 29
- Stages of Prospect Research on page 55
- Prospect Research Reporting on page 443

Access Prospects Page

The majority of your major giving and prospect research tasks can be accessed from the Prospects page in CRM.

Prospects can be found from your Home page or from the navigation bar. However, if you don't see this feature area and you need access, your security settings may need to be adjusted by your site administrator.



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.

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.

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 24.

Access the Prospect's Wealth and Ratings Record

From a constituent, volunteer, member, or sponsor record, click **Wealth and ratings** under **More information** in the explorer bar located on the left side of the screen. The Wealth and Ratings record appears. If you do not see the explorer bar, click on the small arrow located in the upper-left side of the application screen.

Tip: You can also open the prospect's wealth and ratings record from your research lists or from *Prospects*, under Prospect Management, click **Search Prospects**.

Fundraiser On the Go

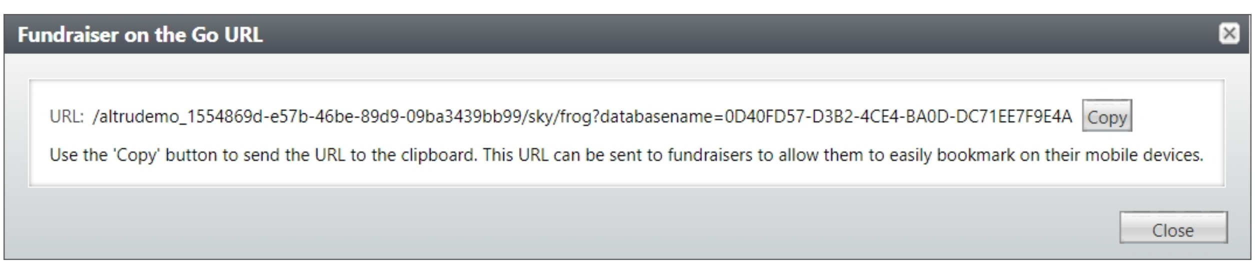
Fundraiser on the Go is a web-based application fundraisers can use to complete prospect plan tasks from their mobile device. While fundraisers are out of the office, they can use the app to view a prospect's information to prepare for a meeting — afterwards, they can update their notes and next steps 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: The feature permissions for users are located under "Prospect Management>Mobile."

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.



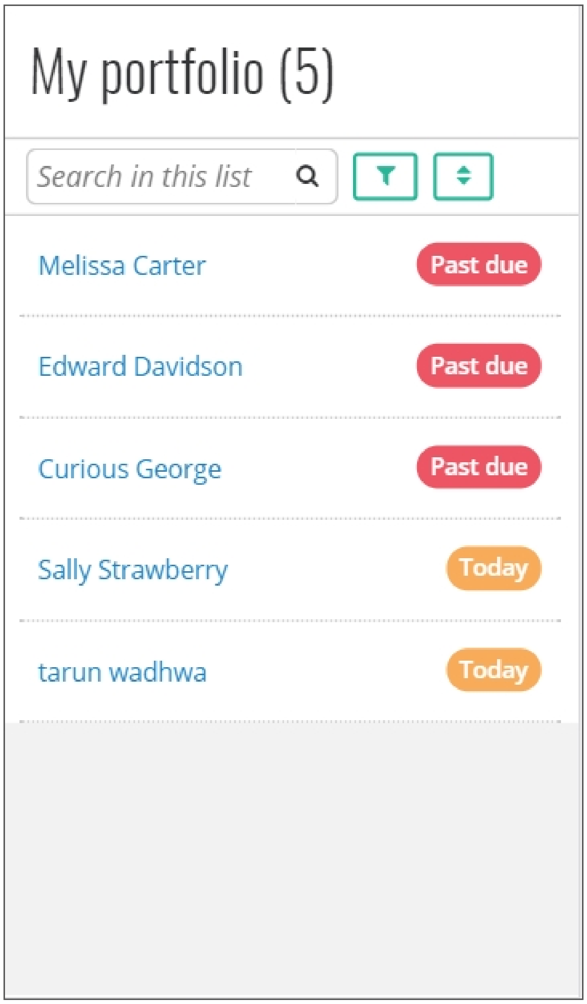
Access Fundraiser on the Go

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 constituent in the database, not just those assigned to you. to search by country and phone number, you'll need to enable those fields in ***CRM***:

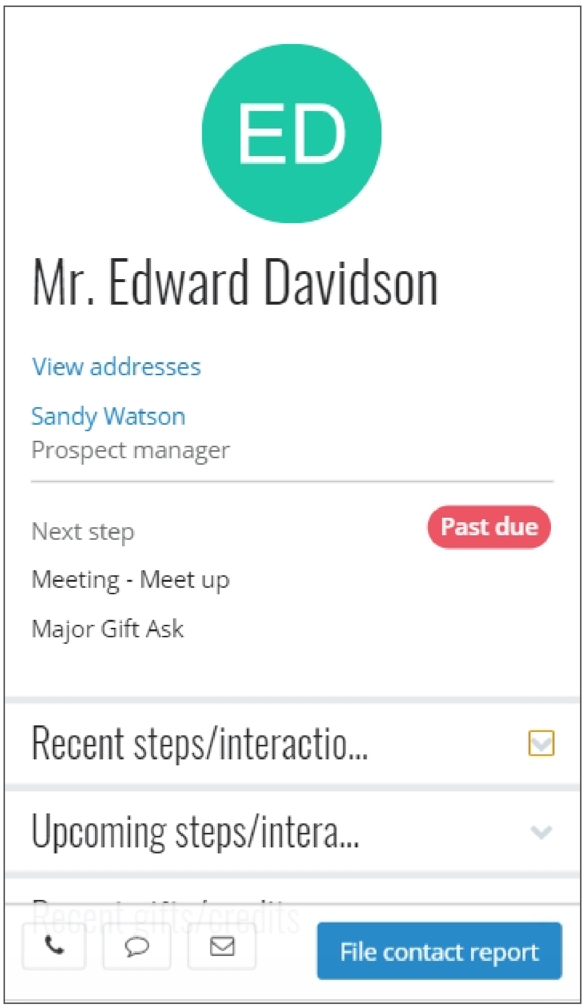
Note: The prospect list does not include deceased prospects or those linked to inactive prospect plans. In addition, the list does not include any constituents for which you are a relationship manager — you must be their prospect manager.



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.



Enable Country and Phone Number Search

To search by country or phone number in *Fundraiser on the Go*, you must enable these searches in your database.

1. Toggle to Design Mode.
2. From *Prospects*, right click **Search constituents** and click **Go to search list**. The Search List: Constituent Search page appears.
3. Click **Settings** under **Tasks**. The Edit settings for Constituent Search screen appears.
4. Select "Country" and "Phone number" under **Available filter fields** and click **Save**.

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*.

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.
- Set up the organizational hierarchy. This enables you to properly set up the roles and who reports to whom in your major giving team(s). When you set up the hierarchy, it also enables you to properly assign users to prospects and track performance according to the opportunities presented during prospect research. This is especially important if you want to track revenue in association with prospect research performance.
- 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.
- Review and if needed, add data to your Major Giving, Prospect Research, Prospect Research Request, Planned Giving, and Stewardship code tables.

Major Giving Setup

In **Major Giving Setup**, you define plan outlines and opportunity amount ranges for major giving prospects. To automatically credit solicitors for revenue received on a major giving opportunity, you can also default credit rules which assign specific percentages of credit to the manager and solicitors associated with the plan. You can also select whether to automatically calculate the realized amount for each type of planned gift vehicle.

Manage Plan Outlines

Plans detail how you intend to win a donation from a prospect. They include objectives, stages, dates, and steps you intend to take, such as meetings and phone calls. When you create a plan outline, your *Prospects* users can assign the outlines to plans they create on the prospect record. For example, if you have very specific steps you want taken for any planned gift prospect, you can create a “Planned Gift” plan outline. Then, when one of your fundraisers adds a planned gift plan to a prospect record, they can point to the outline. The steps defined in the outline then default into the prospect plan.

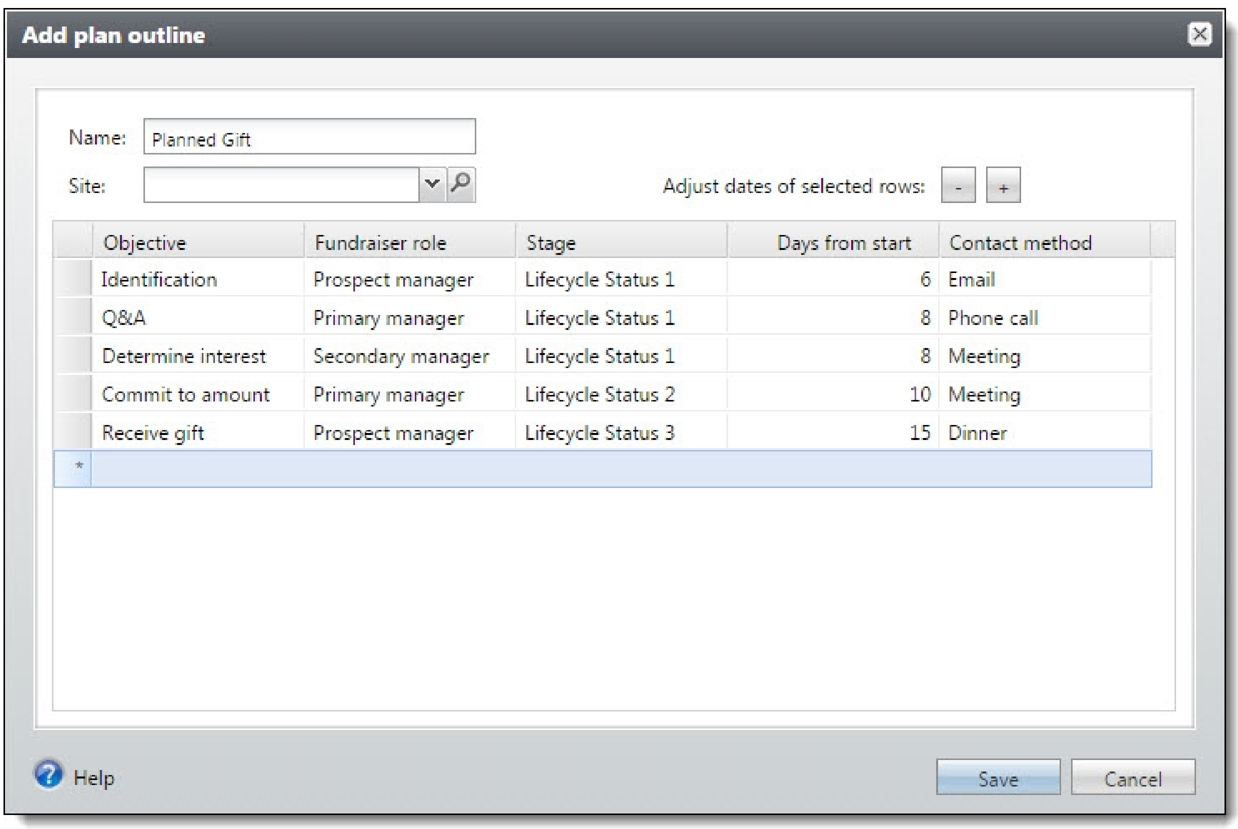
You can delete any outlines that you no longer want available to your *Prospects* users. Once an outline is deleted, it cannot be assigned to any new plans. It remains, however, on any plans to which it was assigned before being deleted.

Add a prospect plan outline

Once you add a plan outline, your *Prospects* users can than access the outline from the Plans tab of a prospect and use the outline to complete the plan they assign the prospect.

Note: To help set up major giving plan outlines, the program provides a default basic major giving plan. This plan provides a basic outline of multiple steps to foster a relationship with major giving prospect through the stages of identification, cultivation, solicitation, and stewardship.

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Plan outlines tab.
3. Click **Add**. The Add plan outline screen appears.



4. Name your outline.
5. In the **Site** field, you can limit access to the plan outline to users with security permissions for a specific site.

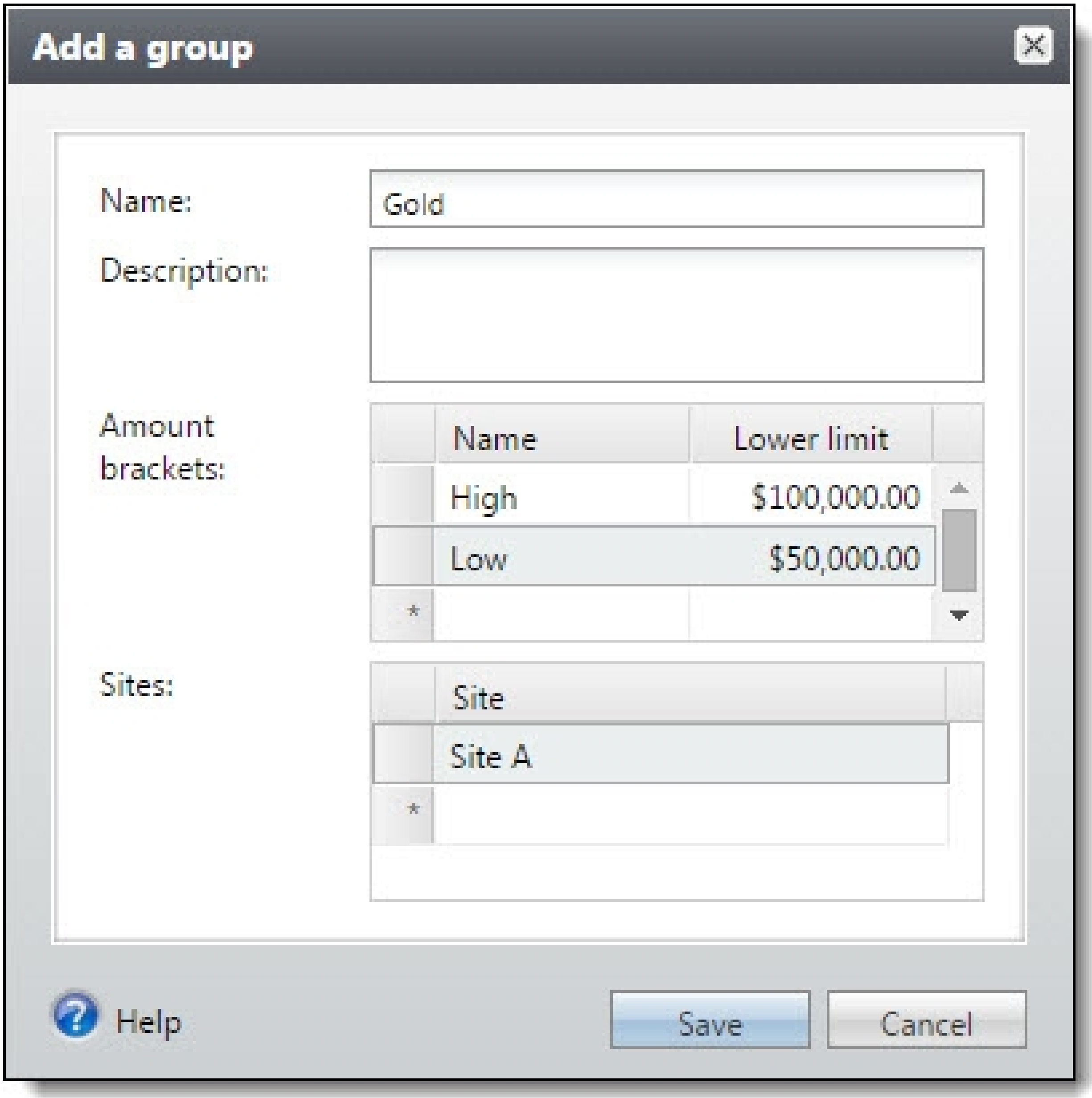
6. For **Adjust dates of selected rows**, select the row(s) in which you want to adjust **Days from start** data and click the **Plus** or **Minus** button accordingly. You can select more than one row at a time to adjust.
7. In the **Objective** field, enter what you hope to accomplish during this planned step.
8. In the **Fundraiser role** field, select which *Prospects* role is responsible for executing the planned step.
9. In the **Stage** field, select where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
10. Enter how many days from the start of the plan until this step is to be completed. When the outline is applied to a plan, the program calculates the date.
11. For the **Contact method**, select the type of interaction you plan to have with the prospect: meeting, mailing, phone call.

Manage Opportunity Amount Ranges

The opportunity amount ranges are used in *Prospects* to classify your prospect's giving opportunity potential. From the Opportunity Amount Ranges tab in **Major Giving Setup**, you can add, edit, and delete amount range groups to meet your organization's specific needs. You can also restrict access to the groups based on sites.

Add Opportunity Amount Ranges

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. Click **Add group**. The Add a group screen appears.



4. In the **Name** field, enter a name identifying the opportunity amount range group.
5. In the **Description** field, you can enter additional information to help you identify the goal of this group.
6. In the **Amount brackets** grid, create the amount ranges you want to include in this group. Enter a **Name** and a **Lower limit** amount for each range.
7. In the **Sites** grid, you can assign the group to a specific site in your organization, limiting who has access to the ranges. You create sites with the **Sites** tool accessed under **Configuration** in *Administration*.
8. Click **Save** to save the group and return to the Opportunity Amount Ranges tab.

Change Base Currency of Amount Group

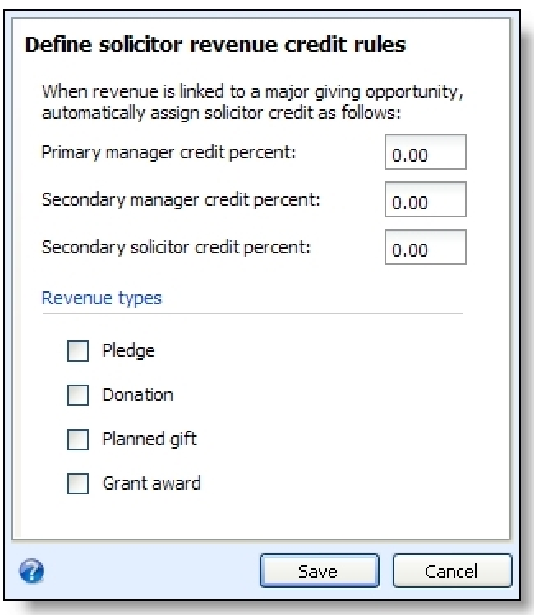
1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. In the **Opportunity amount ranges** grid, select the range and click Change base currency.
4. Select the base currency to use for the group.
5. Click **Save** and return to the Opportunity Amount Ranges tab.

Manage Solicitor Revenue Credit

When you create a major giving plan, you assign solicitors and add an opportunity to the plan. After the prospect contributes a gift, you can credit the plan's solicitors for the revenue you receive. To simplify this process, you can define default credit rules for plan solicitors. When you apply revenue to the opportunity, solicitors linked to the associated major giving plan automatically receive credit based on the credit rules you create.

Edit solicitor revenue credit rules

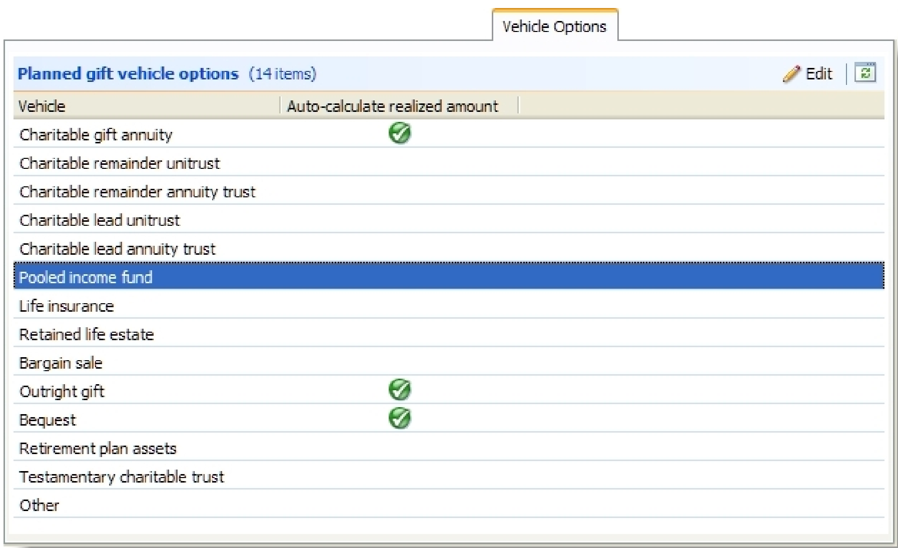
1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Solicitor Credit Rules tab.
3. Click **Edit**. The Define solicitor revenue credit rules screen appears.



4. Enter the credit amount, up to 100 percent, to automatically assign to the primary manager, secondary manager, and secondary solicitors assigned to a major gift plan or grant funding request.
5. In **Revenue types**, select each type of revenue to include for the credit default.
6. Click **Save**. You return to the Solicitor Credit Rules tab.

Manage Vehicle Options

When you add a planned gift, you select its applicable vehicle such as charitable gift annuity or bequest. On the Vehicle Options tab, for each vehicle type, you can select whether to enable the option to automatically calculate the realized amount as your organization receives revenue toward a planned gift.



Edit the options for a planned gift vehicle

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Options tab, select the vehicle to edit and click **Edit**. The Edit planned gift vehicle options screen appears.

3. Select whether to enable the option to automatically calculate the realized amount for planned gifts of the vehicle type.

   Note: When you select this option, the realized amount for a planned gift of this vehicle type is not automatically calculated. Instead, the task to automatically calculate that amount is available from the planned gift under **Tasks**.

4. Click **Save**. You return to the Vehicle Options tab.

Note: If you select to automatically calculate the realized amount for a planned gift vehicle, users can disable the automatically calculated amount for a planned gift if necessary.

Manage Vehicle Subtypes

When you add a planned gift and select its applicable vehicle such as charitable gift annuity or bequest, you can also specify a subtype to further describe the vehicle. On the Vehicle Subtypes tab, you can create subtypes and determine which vehicle types should use them.

Note: Charitable gift annuities have pre-defined subtypes that cannot be edited. You also cannot add additional subtypes for charitable gift annuities from the Vehicle Subtypes tab.

Add Subtypes for Planned Gift Vehicle

Add subtypes for a planned gift vehicle

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, click **Add**. The Add a subtype screen appears.
3. Enter a subtype name and then select which planned gift vehicles this subtype applies to.
4. Click **Save**. You return to the Vehicle Options tab.

Mark Subtype for Planned Gift Vehicle Active/Inactive

Mark subtypes for a planned gift vehicle active or inactive

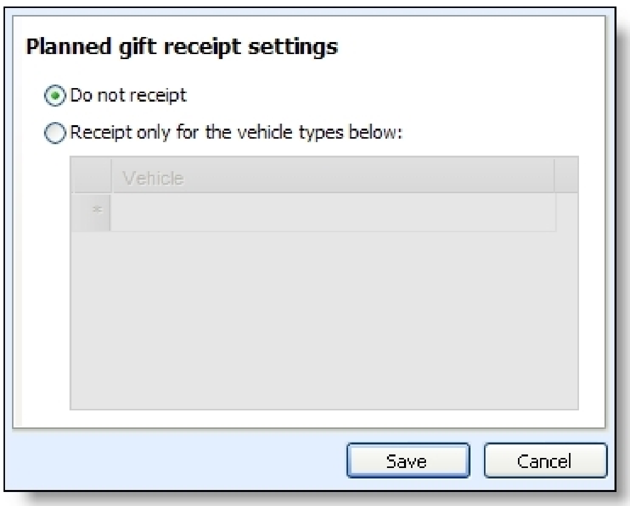
1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, select the subtype and click **Mark inactive** or **Mark active**. A confirmation message appears.
3. Click **Yes** and the vehicle subtype is now inactive or active. You return to the Vehicle Options tab. Inactive subtypes are not available to use on planned gifts.

Manage Planned Gift Receipts

When planned gifts are irrevocable and your organization is the trustee on a gift, it may be appropriate to receipt for planned gifts. Ultimately, your decision to receipt for planned gifts should be based on your own processes and tax laws. From Major Giving Setup, you can select, by vehicle type, which planned gifts to receipt. You can also select to not receipt planned gifts.

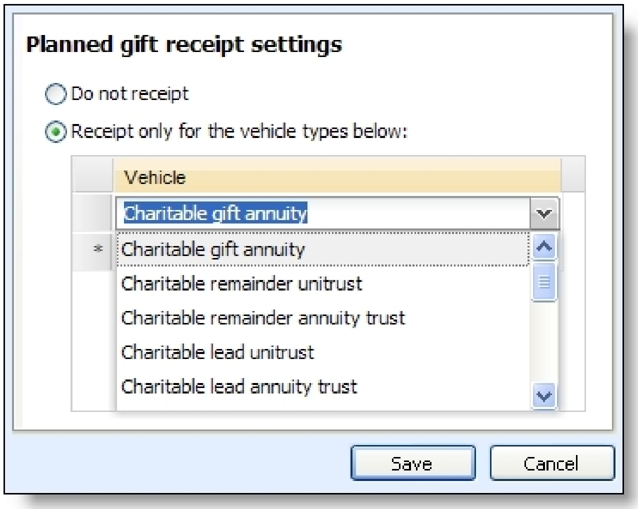
Edit planned gift receipt settings

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Planned Gift Receipts tab.
3. Click **Edit**. The Planned gift receipt settings screen appears.



4. To produce no receipts for planned gifts, select **Do not receipt**.
5. To receipt for planned gifts, select **Receipt only for the vehicle types below**.

   From the grid, select the vehicle types for which to receipt.



6. Click **Save** to save the planned gift receipt settings and return to the Planned Gift Receipt Settings tab. The new settings appear on the tab.

Grants and Major Giving

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. From *Prospects*, click **Major giving setup** under **Configuration**. From the Major Giving Setup page, click **Include grants in major giving management** under **Configuration**. When you apply this setting, grant activity appears in *Prospects*.

- On a fundraiser’s My prospect research page, the steps assigned to the fundraiser on a funding request appear. From the Grants tab, individuals can view information about their fundraising activity related to grants.
- On the Major Giving Management – Prospects page, current grant activity appears under **Grants in Pipeline** on the Pipeline tab.
- On the Major Giving Management – Opportunities and Asks page, grant funding request information appears under **Funding request summary** on the Summary tab.

If you previously included grant activity but no longer want to have a consolidated view, click **Exclude grants from major giving management**.

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

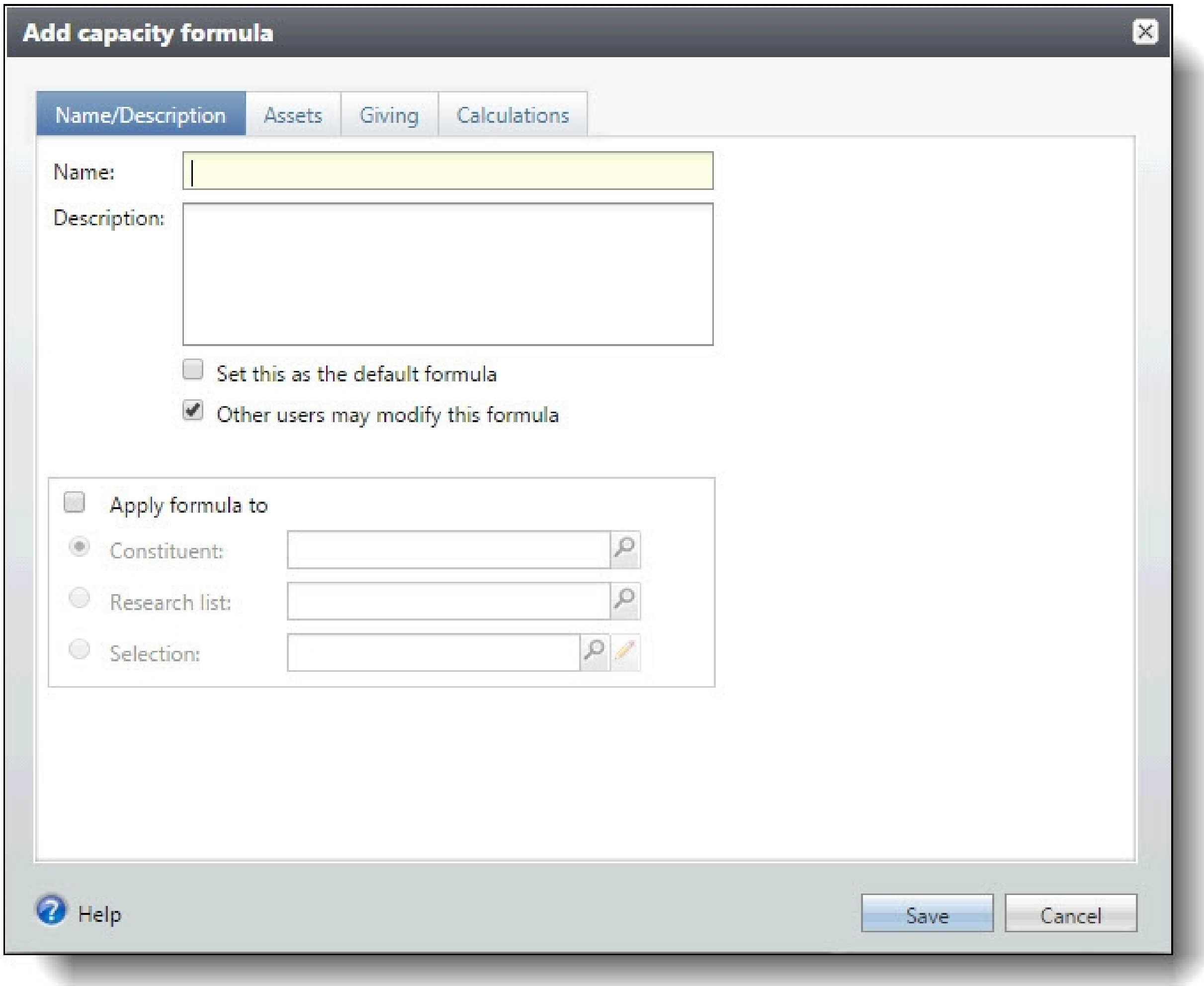
In addition to the default formula provided with the system, you can create new formulas for calculating a prospect’s estimated wealth, major giving capacity, and major giving capacity value. You create a new capacity formula from the Capacity Formula Management page.

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

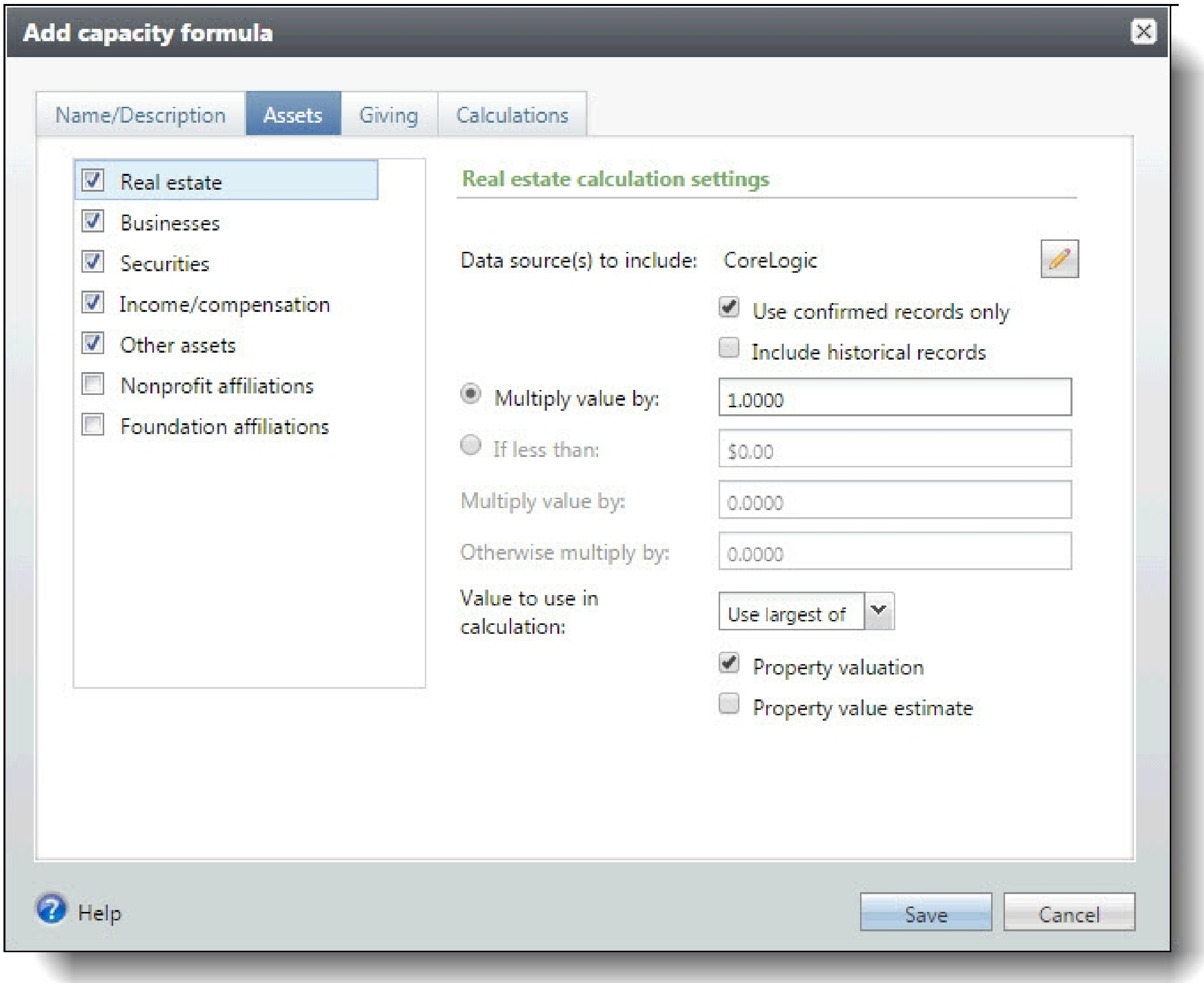
The add and edit capacity formula screens consist of the Name/Description, Assets, Giving, and Calculations tabs. Using these tabs you create or edit a new wealth capacity formula.

Add a Capacity Formula

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



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.

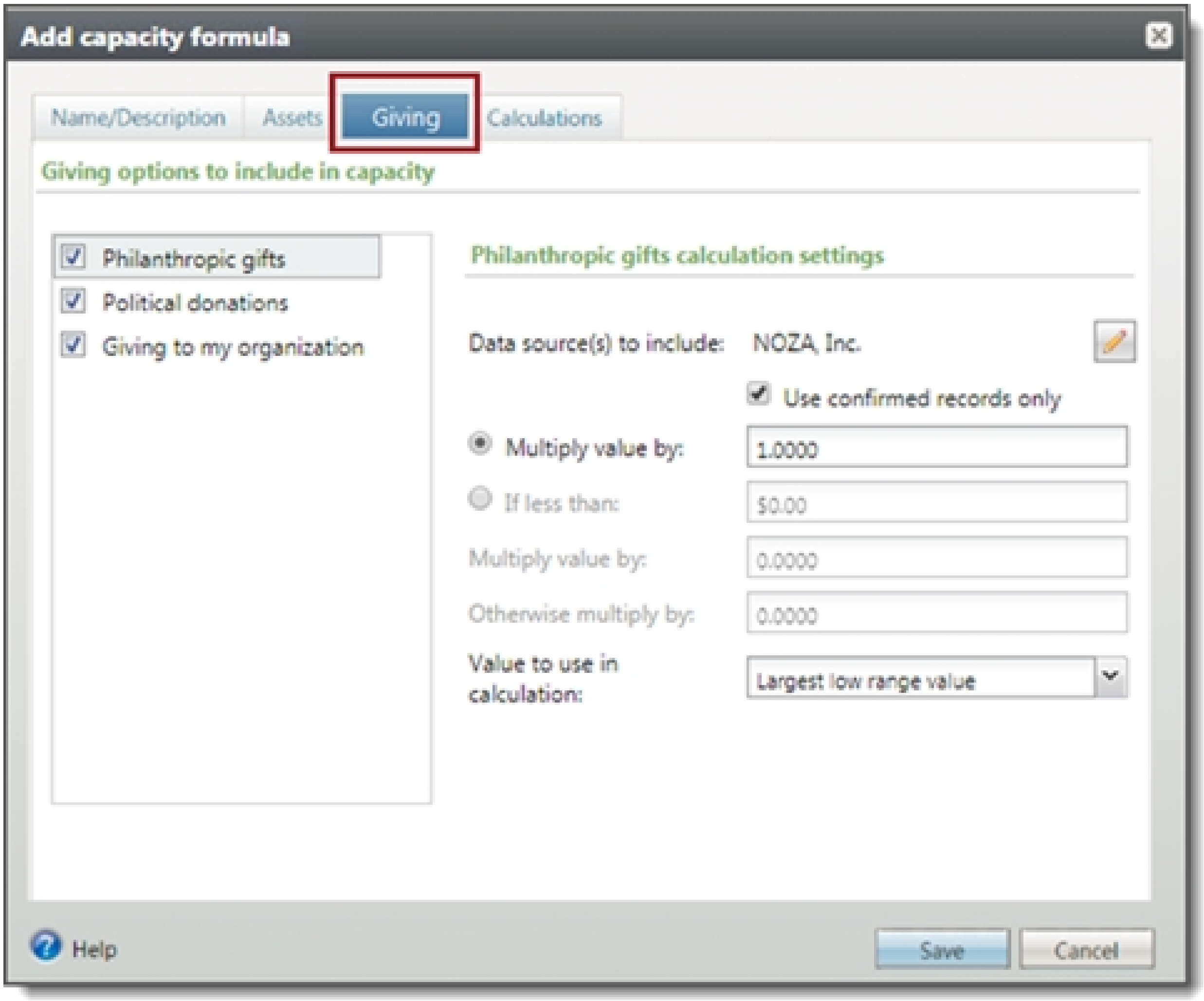
   For each of the calculation settings, select which data sources to include, whether to include only confirmed sources, and then customize the mathematical formula. For example, you can multiply a prospect's wealth value by greater or less than 1.000 to increase or decrease an aspect of wealth. For expensive 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.

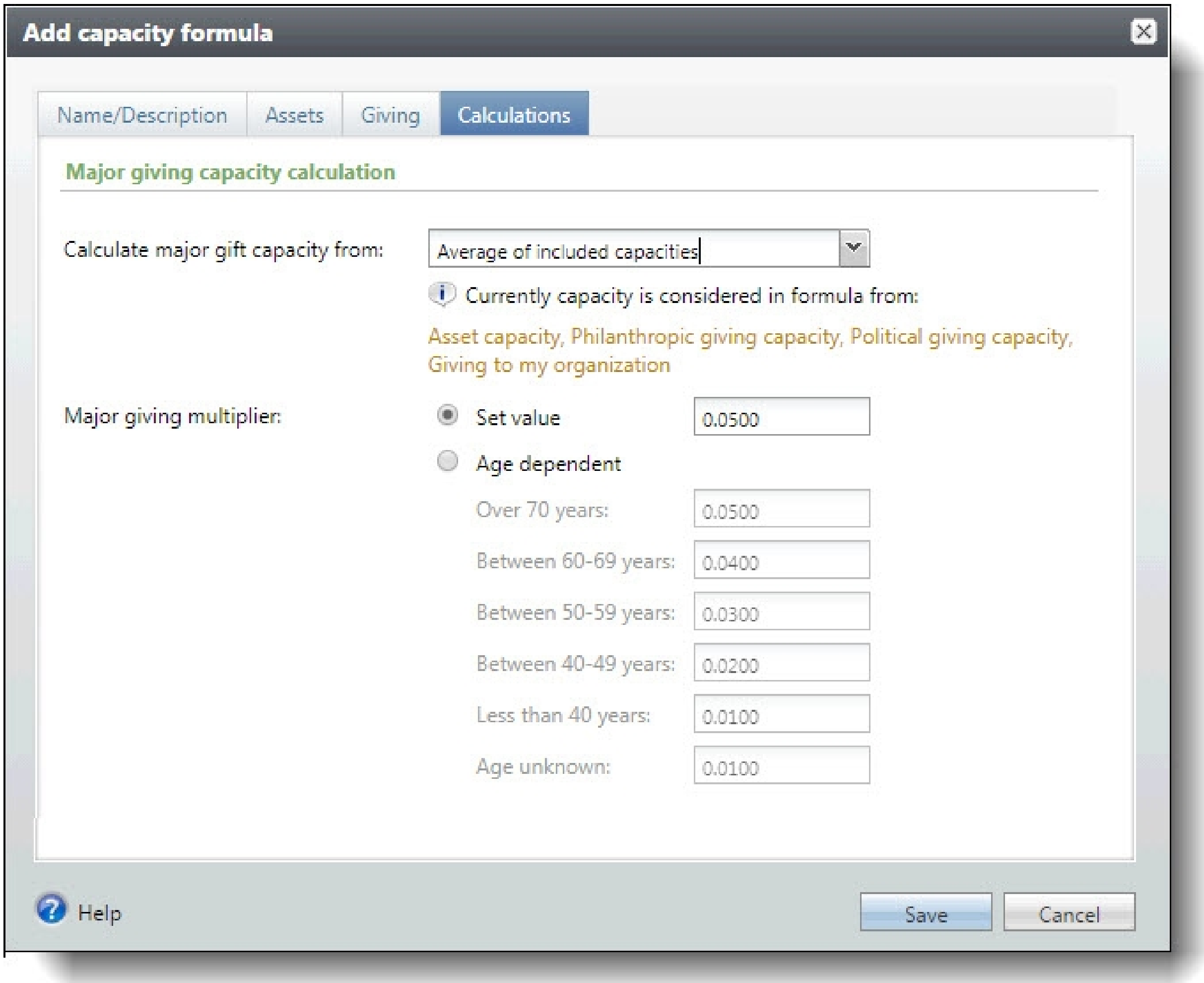
7. Select the Giving tab.



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** 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.
   - 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.

Define Likelihood Percentages

To track projected revenue for major giving plan opportunities, you can indicate the likelihood your organization will receive each ask amount. From the Define Likelihood Percentages page, you create the likelihood definitions. For example, you may have a likelihood of “Excellent” you define as “100%” to indicate you expect the prospect to give the total amount asked. You can use this information when you create analytical reports to determine the revenue you expect to receive based on the current status and likelihood assigned to opportunities.

Edit your Likelihood Percentages

When you add an opportunity to a major giving plan, you can select the likelihood that a prospect will give the amount asked. Before you select the likelihood, you define the likelihood percentages.

Sample Likelihood Percentages –

Likelihood	Percent

Excellent	100
Very Good	90
Good	80
Average	50

Define percentages

1. From the Prospects page, select **Define likelihood percents** under **Configuration**. The Define Likelihood Percentages page appears.
2. Click **Edit likelihood percentages**.
3. Enter a name to describe the degree of likelihood.
4. Enter a number to define the likelihood. When you assign a likelihood to an opportunity, the percent indicates the probability a prospect will give the gift amount requested. Reports and dashboards use this information to calculate projected revenue for opportunities.

   Tip: Changes you make to the name or percent automatically appear on opportunities assigned this likelihood. For example, if you change a likelihood of "Excellent" from "100%" to "95%," the percent changes on all opportunities identified as "Excellent." Reports and dashboards use the new percent to calculate projected revenue.
5. Click **Save**. You return to the Define Likelihood Percentages page.

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.

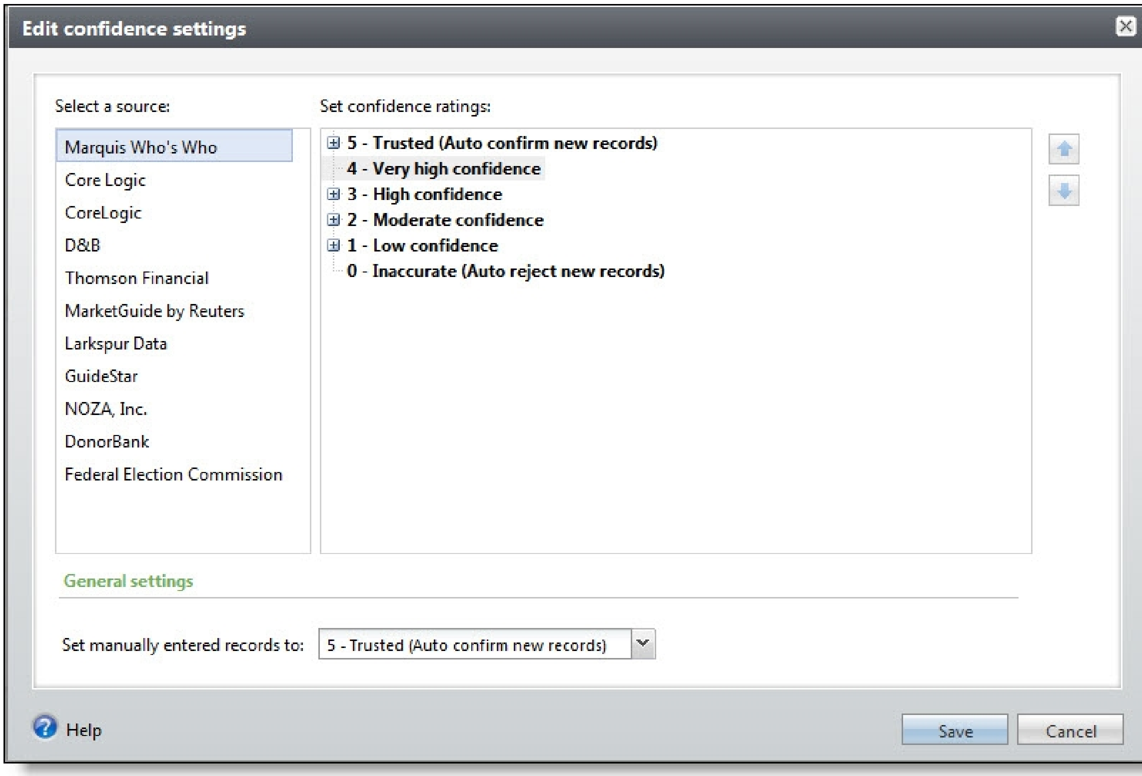
Rating	Description
5	Confirmed record – Any record confirmed in the application receives a 5 rating. You designate a record “Confirmed” by selecting the record and clicking the **Confirm** button. When you confirm a wealth information record, the **Confidence** number changes to “5” and a green check 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.

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.

Stewardship Plan Templates

Before you define a stewardship plan for a constituent, you can create stewardship templates from prospects. These templates include basic steps, such as meetings or phone calls, stewards perform to strengthen and retain your organization's relationship with selected donors. With a template, you can add multiple, related steps to a plan at one time. After you add template steps to a stewardship plan, you can edit these steps, add new template steps, or manually create steps to design a custom plan for the constituent.

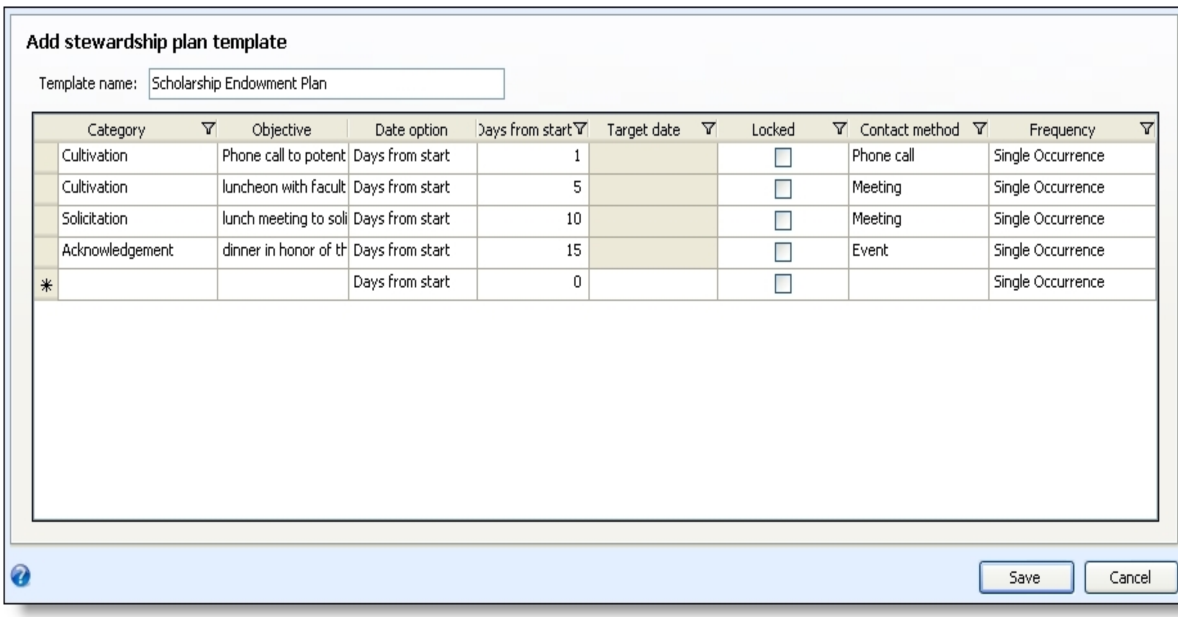
View Templates

From *Prospects*, click **Stewardship plan templates** under **Configuration** in the explorer bar to access the Stewardship Plan Templates page. Select a template to view the plan's steps in the **Details** grid.

Add Templates

After you add a template, you can import the template steps into the **Planned and pending steps** grid on the Details tab of the Stewardship Plan page.

1. Under Configuration in Prospects, click Stewardship plan templates. The Stewardship Plan Templates page appears.
2. Click **Add**. The Add stewardship plan template screen appears.



3. Enter the necessary information. For a detailed explanation of the options on this screen, see Add Stewardship Plan Template Screen on page 51.
4. Click **Save**. You return to the Stewardship Plan Templates page.

Add Stewardship Plan Template Screen

Screen Item	Description
Template name	Enter a unique name for the template.
Site	You can select one or more sites to associate with the stewardship plan template. Templates can be used by users in those sites. The site of the stewardship plan template does not impact the site of the stewardship plan.
Category	Enter a category for the step.
Objective	Enter the reason your organization or a steward should perform this step.
Date option	Select "Days from start" to enable the **Days from start** field or select "Specific date" to enable the **Target date** field.
Days from start	The start date is the day you add the template step to a stewardship plan. In **Days from start**, enter the number of days after the start date for the step to occur. For example, to have a steward contact the donor two days after you add this step to the donor's stewardship plan, enter "2." The program calculates the calendar date for the step to occur based on the date you add the step to a plan and the number of days you enter in **Days from start**.
Target date	Select the date the step should occur from the calendar.
Locked	Select to disable date fields for the step. When you move dates forward or backward in the **Adjust expected dates** fields on a stewardship plan, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Contact method	Enter how you intend to contact the constituent for this step.
Frequency	Select how often the step occurs.

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 screeings** 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.

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.

Stages of Prospect Research

We know that your major giving development efforts require a large effort and specific tasks custom to your organization's needs. However, we've tried to organize our prospect research tools according to a standard prospect research workflow. And while this guide is set up according to a basic worfklow, the CRM *Prospects* features are flexible enough to meet your needs. Here's a basic outline to how we define the phases of prospect research. Keep in mind you may call these stages by a similar, but different word.

Stage 1 - Identification: Using a variety of sources, you identify constituents who have the capacity and inclination to donate to your organization. Only a quick, surface level wealth research is performed at this time.

Stage 2 - Qualification: Before you perform a complete wealth research profile on constituents identified in stage 1, you may have your development/gift officers qualify these individuals to increase your confidence in their interest in helping your organization. Whether by email or phone call, your fundraisers contact the constituents to get to know them better. If they don't respond or answer your phone calls, comprehensive wealth research is not recommended at this time.

Stage 3 - Cultivation: After a prospect is qualified, you assign a major giving plan, assign their fundraisers and solicitors, and develop their prospect research wealth profile. Confirming and rejecting wealth data is important during this phase so you fully understand their capacity and past giving history.

Stage 4 - Solicitation Prep or Solicitation: Some organizations have researchers perform additional wealth research tasks as part of the last steps in the plan before you make the major gift ask. This is also the time that your development/gift officers prepare for and identify the opportunity that matches the prospect's interest in donating to your organization.

Stage 5 - Closing: The final steps in the major gift plan outline, you finalize the major or planned gift and prepare to move the prospect to a stewardship plan.

Stage 6 - Stewardship: For those prospects who become a major giver to your organization, they deserve their own lifelong stewardship plans in case the opportunity arises for them to donate another gift. In addition, you can ensure the promises outlined during the opportunity are fulfilled in stewardship.

Identification

We know that identification can come from many different sources, including many that happen outside of the software. As you begin to use prospect research, determine where you can acquire prospects to start wealth research:

- Volunteers
- Attendees from events in the last year
- Recommendations from board members and development officers
- Higher education? Parents of new students, athletic ticket purchasers, and alumni lists
- Health care? Grateful patients programs
- New users of your organization's services
- Within your own database? Don't forget to use *Query* and/or *Research Lists* to identify constituents who donate regularly, have given large gifts, or whose characteristics match those you identify as able or likely to donate a large gift.

With your list of potential major giving prospects to wealth screen, you can add them as major giving prospects, research individually with the external prospecting database, or create research lists to track and wealth screen more efficiently.

When you identify those who need to be qualified, you can formally request a prospect research plan, and assign the prospect to a fundraiser.

Add A Major Giving Prospect

From *Prospects* you can add a constituent, constituent group, or household that exists in your database as a “Prospect” or you can add a new constituent, constituent group or household to your system as a “Prospect”. When you add new constituents to your system as a prospect, the program saves the biographical information you enter on the Add a prospect screen to a constituent as well.

Add a new prospect to your system

1. From the *Prospects* page, click **Add a major giving prospect**. The Add a prospect screen appears.
2. In the **Constituent** field, click the binoculars. A search screen appears.
3. Because the prospect you want to add does not have a record in your system, in the **Results** frame of the search screen, click **Add**. Select “Individual”, “Household,” “Group,” or “Organization,” depending on what exactly you want to add to *Prospects*. The appropriate screen appears. For example, if you select “Individual,” the Add an individual screen appears; if you select “Group,” the Add a group screen appears.
4. Enter the necessary information.
5. Click **Save** to save the new prospect. The Add a prospect screen appears.

6. In the **Constituent** field, click the binoculars. A search screen appears, and you can locate the constituent or constituent group or household you want to add as a “Prospect.”
7. In the **Prospect manager** field, click the binoculars. A search screen appears, and you can locate the manager you want to assign this new prospect.
8. In the **Start date** field, enter the date on which this manger’s association with the prospect begins.
9. Click **Save**. You return to the prospect record you just created.

Add a constituent as a prospect

1. From *Prospects*, click **Add a major giving prospect**. The Add a prospect screen appears.
2. In the **Constituent** field, click the binoculars. A search screen appears.
3. Search for the constituent you want to designate a prospect. You return to the Add a prospect screen.
4. In the **Constituent** field, click the binoculars. A search screen appears, and you can locate the constituent or constituent group or household you want to add as a “Prospect.”
5. In the **Prospect manager** field, click the binoculars. A search screen appears, and you can locate the manager you want to assign this new prospect.
6. In the **Start date** field, enter the date on which this manger’s association with the prospect begins.
7. Click **Save**. You return to the prospect record you just created.

Add a plan to a prospect

When you add a major giving prospect, you can create a plan for your prospect. A plan is based on a previously set up plan type and outline. You can also assign the plan managers, solicitor, and participants. We recommend you add a plan to all new major giving prospects so they don't get lost in your major giving program.

1. Name the plan assigned to this prospect. It can be unique name or a predetermined name based on the plan type.
2. Select the type of prospect you want to assign to this prospect. For example, you may have a several different types of major giving plans: major gift, planned gift, annual giving, and more.
3. Enter a start date for the plan.
4. Select a plan outline, if any, associated with the plan type. Plan outlines are set up by your major giving administrator from Prospects, Major Giving Setup.
5. Search for and select the primary and secondary managers and secondary solicitors for the prospect plan. For the secondarysolicitors, you also select their plan role.

   You can assign start dates for the primary and secondary managers as well as the secondary solicitors, designating when their relationship with the prospect is to begin.
6. The **Plan participants** column identifies the constituent participants:

- Constituent household: Lists family members
- Organization constituent: Lists contacts and relationships to the organization
- Individual constituent: Lists related constituents
- Constituent group: Lists members included in the group

The **Role** volume identifies the plan participants role in the group. For example, “Decision Maker” or “Key influencer”.

7. Enter the site in your organization to which the new prospect is associated. Note: Administrators can set up security access to prospects based on site. Any security settings your administrators established for the site you spe the cify in the **Site** field take effect for this prospect as soon as you click **Save**.
8. To create the new plan for the prospect, click **Save**.

Plan Tab

Screen Item	Descriptions
Plan name	Name the plan assigned this prospect.
Plan type and **Start date**	Select the type of prospect plan you want to assign this prospect (Major Gift, Volunteer, Planned Gift). You can also enter a start date for the prospect plan. For more information about plans, see Prospect Plans on page 313
Plan outline	Select the plan outline, if any, associated with the **Plan type**. Plan outlines are an administrative responsibility created in **Major Giving Setup**.
Primary manager	Click the binoculars in this field. A search screen appears, and you can locate the primary manager you want to assign this prospect.
Secondary manager	Click the binoculars in this field. A search screen appears, and you can locate the secondary manager you want to assign this prospect.
Secondary **solicitor** s/Role	Click the binoculars in the this column. A search screen appears, and you can locate the secondary solicitor you want to assign to this prospect. You can assign as many solicitors as necessary in this grid. In the **Role** column, select the secondary solicitor’s role: volunteer, trustee, president, etc.
Start date fields	You can assign start dates for the primary and secondary managers as well as the secondary solicitors, designating when their relationship with the prospect is to begin.

Screen Item	Descriptions
Plan participants	The **Plan participants** column identifies the constituent participants: • Constituent household: Lists family members • Organization constituent: Lists contacts and relationships to the organization • Individual constituent: Lists related constituents • Constituent group: Lists members included in the group The **Role** volume identifies the plan participants role in the group. For example, "Decision Maker" or "Key influencer".
Sites	Enter the site in your organization to which the new prospect is associated. Note: Administrators can set up security access to prospects based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this prospect as soon as you click **Save**.

Team Tab

If, in addition to the development officers and other fundraising resources assigned a prospect through prospect plans, you need to include additional individuals who also have an interest in the cultivation activities associated with the prospect outside of the plan - such as a senior development officer or prospect researcher, you can track these individuals using the Team tab.

Any constituent with the constituency of "Fundraiser" can be assigned as a team member.

Screen Item	Descriptions
Team Members	Click the binoculars in this column. A search screen appears, and you can locate the constituent you want to add as a team member to this prospect. You can assign as many team members as necessary in this grid.
Role	Enter the team member's role in working with this prospect: volunteer, trustee, influencer, etc.
Start Date	Enter the date on which this constituent became a team member.
Position Site	This field is automatically populated based on the organizational hierarchy. Note: Administrators can set up security access to prospects based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this prospect as soon as you click **Save**.

Search External Prospecting Database

The Target Analytics external prospecting database enables you to locate new prospects or find additional information on existing prospects.

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

Recommended Prospecting Search Workflow

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

Prospecting Database Search Results Grid

When you search for new prospects, each search result in the gird displays the prospect's full name and age with additional prospect information in tiles. To see all tiles for a search result, click **Show more**. However, you can customize which tiles display and in what order for the search results. On the right side of the Search page, next to the **Sort by** field, click the gear icon. If a tile does not display any information, no information was located for that item in the Target Analytics prospecting database.

Prospecting Database Tiles

- Biographical information: Date of birth, marital status, and occupation
- HH Members: up to 5 household members from Experian with name, date of birth, marital status, and occupation
- Addresses: If more than one found, scroll through the results.
- Confirmed Wealth: Total confirmed wealth and a value for real estate, businesses, and securities
- Giving: Largest gift and giving categories information from NOZA

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

- Real Estate: Real estate records from CoreLogic. If more than one, scroll through the results.
- Businesses: Business ownership association from Dun & Bradstreet. If more than one, scroll through the results.
- Securities: Securities records from Thomson Reuters. If more than one, scroll through the results.
- Demographic Models: Household mosaic, income, and discretionary spending from Experian.

Tip: If a tile contains a link, click the link to view more detailed information. For example, if you click the address link in the **Real Estate** tile, a Real estate information screen appears with all details of the real estate record from CoreLogic. Use this information to verify this is the prospect you want to add and screen in ***ResearchPoint***.

If you find your prospect in the search results, to add the new prospect to your database, click **Screen now**. The Add new individual screen appears. On this screen, you'll also have the option to perform a WealthPoint screening when you save the record.

If you do not find your prospect in the search results, at the top of the page click **Add a new prospect and screen now**. It is possible to find wealth data for a prospect that does not appear in the Target Analytics external prospecting database search. The WealthPoint screening is a comprehensive search of all our data sources. To help find the most data, when you add a new prospect add as much information as you know about him or her. More information helps us match your prospect to records in our database and with greater confidence.

Export Target Analytic search results

1. After running a Target Analytics search, click the export icon located at the top of the results grid.
2. A screen displays allowing you to view the results in an outside application, such as Microsoft *Excel* or save the file to a location on your computer.

Research Lists

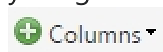
Research Lists are groups of individual constituents. They help you more effectively research potential prospects in batches so you don't need to qualify prospects one-by-one.

The list can be static or dynamic, depending on whether you want to enable the list to be refreshed. For example, you can save time manually adding prospects to your research list of prospects with more than one million in confirmed total assets and a high major giving capacity. When you set your research list criteria, enable the list to refresh automatically every night. Every day prospects who match your criteria are added to the list for you.

The greatest power of Research Lists is in two key features:

1. **Group WealthPoint screenings** - When you develop lists, you can focus your efforts on the constituents with the greatest capacity. You can also perform quick scans of new prospects. With the **Screen list** task, you can batch send a group of constituents through a WealthPoint screening! Whether you're looking for wealth information on a first screening or re-screening a

group of prospects for new information, the group WealthPoint screening enables you to get new data more efficiently.

2. **Customizable columns** - The Members list is one of your greatest assets as a prospect researcher. The Columns button at the top of the list 

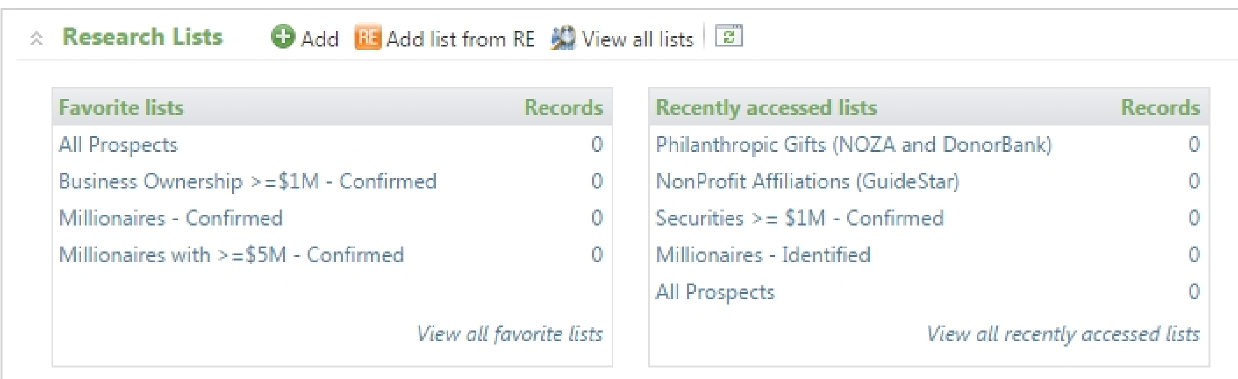
enables you to select which biographical and wealth fields you want to see. Once the columns appear, you can drag and drop them into the order you want to see data. You can sort by columns. And, you can filter by columns. The filter especially helps you to identify which prospects in the list hold the greatest value to your organization. To decide which columns mean the most to you, think about which indicators on a prospect's wealth and ratings records gives you the most insight. Once the records are filtered, select the remaining records. You can then copy them to a new, separate research list or assign a prospect manager. Or, you can do the opposite. You can filter the records to find those constituents who do not provide great opportunity at this time, select the records, and then remove from your list. This enables you to narrow down your research in a more time-effective manner!

To get started with research lists, learn how to create one!

To open a research list already set up, from the Research Lists page, in the **Name** column, click the research list name link.

Access Research Lists

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



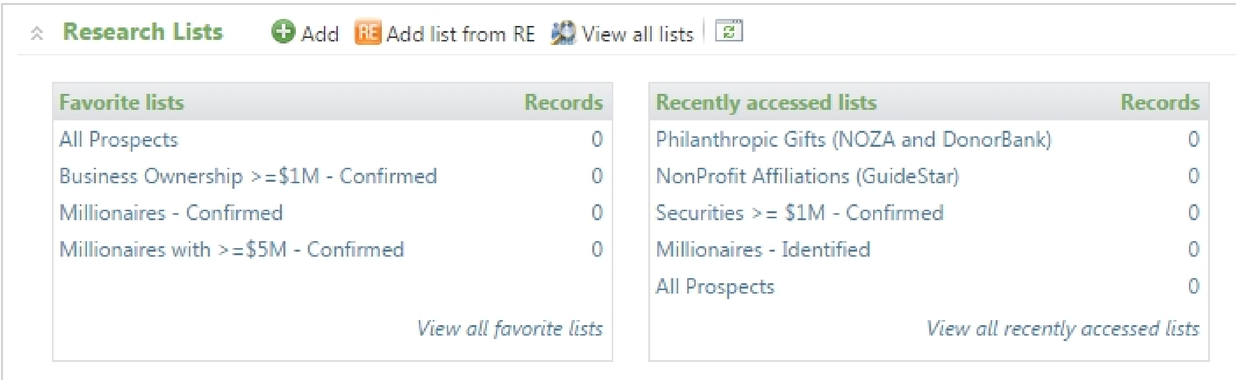
Warning: Only individual records can be added to Research Lists. You cannot include organizations.

Open a Research List

Open an existing Research List

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

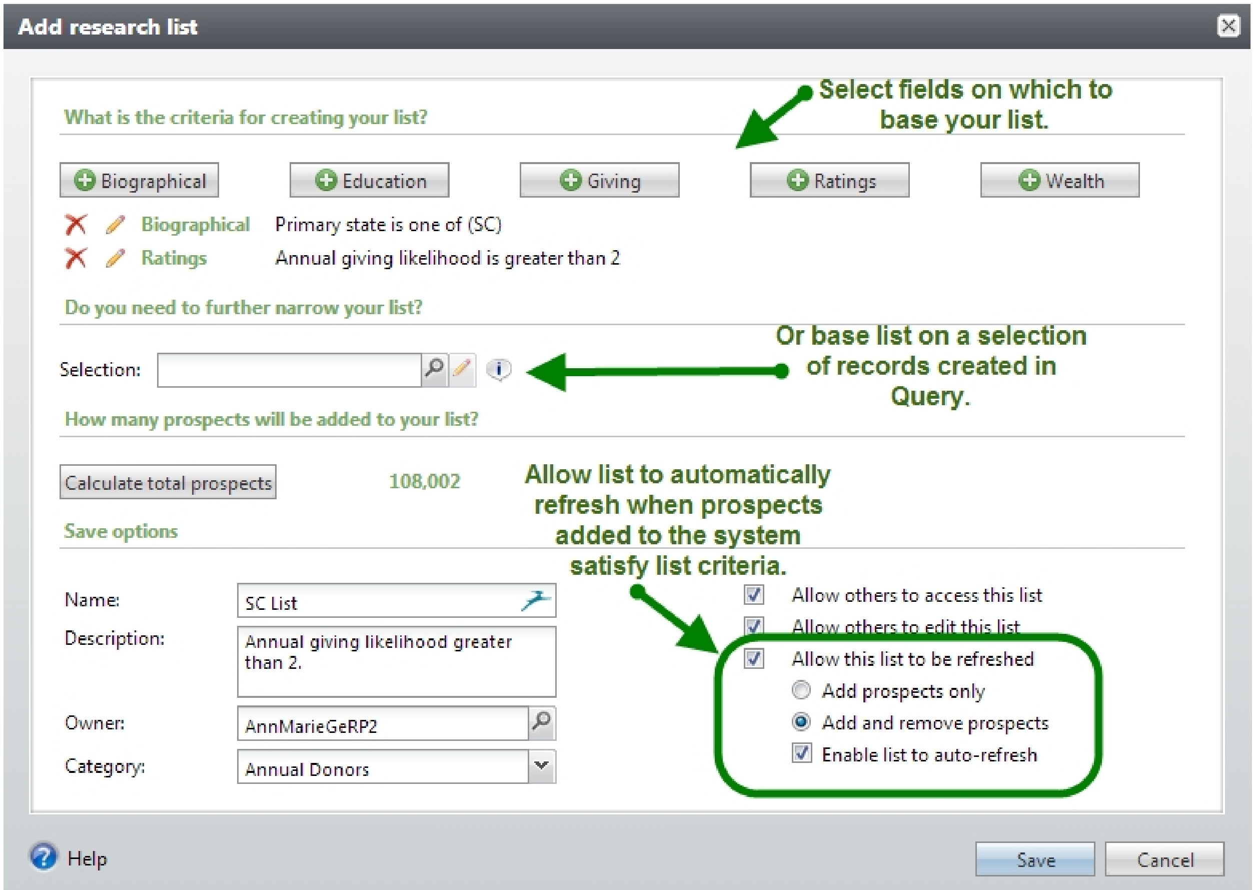
Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.



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

Add a Research List

When you add a research list, you select the criteria you want used to build your group of constituents. Or, if you would rather, you can also create your list from a selection that was created in *Query*.



Add a new research list

1. From *Prospects*, in the **Research Lists** section, click **Add**. The Add research lists screen appears.

   Tip: You can also add a new research list from the Research Lists page.

2. In the **What is the criteria for creating your list?** section, you can build your list based on biographical and wealth fields available in ***ResearchPoint***. For a list of fields included with each option, see Research List Criteria Fields on page 66. This enables you to set rules as you go for which constituents you want to include in your list. No need to create a query in advance.

   To include attributes in your list, select **Include attributes**.

   You add criteria one at a time. To add criteria, select one of the categories.

3. Then, choose which field in that category to search for and find constituent records that match your criteria. After you enter your parameters for the field, click **OK**. You return to the add research list screen and your criteria appears.

   With the red X and the pencil icons you can delete or edit if the parameters are wrong. Otherwise, continue to add as much criteria as you need.

4. In the **Do you need to further narrow your list?** section, you can base your list on a group of records created in *Query*. Click the **Selection Search** icon to locate an existing selection.

   You can create your research list using a combination research list criteria and a query selection.

   > ***Note:*** What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

5. Click the **Calculate total prospects** button at any time to see how many prospects satisfy your criteria. This can especially help you when you set criteria if you have a goal of how many prospects maximum should appear in your research list.
6. In the **Save options** section, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.

   > ***Note:*** Depending on your user role in the system, some options may be grayed out.

7. In the **Description** field, enter a description to help you identify the list. We recommend you summarize what criteria was used.
8. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
9. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.
10. Decide if you want to allow others to access and/or edit this list.
11. To automatically update your research list to include new prospects satisfying your list criteria as they are added to your system, select **Allow this list to be refreshed**. You then determine how the list can be refreshed.
12. Click **Save**. Your new research list appears for you to start researching!

Add a new prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **Add**. The Add research lists screen appears.
2. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in ***ResearchPoint***. For a list of fields included with each option, see Research List Criteria Fields on page 66.

   > ***Tip:*** You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

3. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

> ***Note:*** What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

4. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
5. In the **Save options** section, enter the following:

> ***Note:*** Depending on your user role in the system, some options may be grayed out.

   a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.
   b. In the **Description** field, enter a description to help you identify the list.
   c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
   d. You can also allow other users the access and/or edit your list.
   e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.
   f. Decide if you want to allow others to access and/or edit this list.
   g. To make your list dynamic, which means it is automatically updated to include new prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.
6. Click **Save** to save the new list and return to the Research lists page.

Research List Criteria Fields

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

Biographical Category Fields

List View Column	Field Type	Note
Age	#	
Any business	Text	From name of organization relationship
Any business city	Text	From address of organization relationship
Any business job title	Text	From title of organization relationship
Any business state	Text	From address of organization relationship
Any city	Text	From contact address
Any state	Checkbox	From contact address
Any ZIP	Text	From contact address
Constituency	Checkbox	Constituencies are set up in *Administration* on a code table.
Date added to system	Date	
First name	Text	
Last name	Text	
Primary business	Text	
Primary business city	Text	
Primary business job title	Text	
Primary business state	Checkbox	
Primary city	Text	
Primary state	Checkbox	
Primary ZIP	Text	
Prospect manager	Text	
RE last sync date	Date	Shows only if integrated with The Raiser's Edge.
RE linked?	Y/N	Shows only if integrated with The Raiser's Edge.
Spouse	Text	

Education Category Fields

For criteria with a checkbox, you can edit the options that appear. From *Administration*, under **Data**, click **Code tables**.

List View Columns	Field Type	Notes
Any class of	#	Enter the full year.
Any college/school	Checkbox	
Any degree	Checkbox	
Any degree type	Checkbox	
Any department	Checkbox	
Any division	Checkbox	
Any education institution	Checkbox	
Any educational involvement	Checkbox	
Any program	Checkbox	
Any sub department	Checkbox	
Primary class of	#	Enter the full year.
Primary college/school	Checkbox	
Primary degree	Checkbox	
Primary degree type	Checkbox	
Primary department	Checkbox	
Primary division	Checkbox	
Primary educational institution	Checkbox	
Primary educational involvement	Checkbox	
Primary program	Checkbox	
Primary sub department	Checkbox	

Giving Category Fields

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

Ratings Category Fields

List View Columns	Field Type	Notes
Annual giving likelihood	#	
Annuity likelihood	#	
Bequest likelihood	#	
CRT likelihood	#	
Major giving likelihood	#	
Membership likelihood	#	
Planned giving likelihood	#	
Suggested membership level range	checkbox	
Suggested membership level score	checkbox	
Target gift range	checkbox	
Target gift range score	checkbox	

Wealth Category Fields

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

Biographical Group Fields

List View Column	Field Type
Age Bio	#

List View Column	Field Type
Any Business	Text
Any Business City	Text
Any Business Job Title	Text
Any Business State	Text
Any City	Text
Any State	Text
Any Zip	Text
Constituencies	#
Date added to system	Date
First Name	Text
Last Name	Text
Last RE7 sync date	Date
Primary Address	Text
Primary Business	Text
Primary Business City	Text
Primary Business Job Title	Text
Primary Business State	Text
Primary City	Text
Primary State	Text
Primary Zip	Text
Prospect Manager	Text
RE7 linked?	Y/N
Spouse	Text

Educational Group Fields

List View Columns	Field Type
Any Class of	#
Any College/School	Text
Any Degree	Text

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

Giving Category Fields

List View Column	Field Type
First Gift	$
First gift date	Date
First gift designation	Text
First gift type	Text
Largest gift	$
Largest gift date	Date
Largest gift designation	Text
Largest gift type	Text
Latest gift	$

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

Rating Group Fields

List View Columns	Field Type
Annual Giving Likelihood	#
Annuity Likelihood	#
Bequest Likelihood	#
CRT Likelihood	#
Major Giving Likelihood	#
Membership Likelihood	#
Online Giving Likelihood	#
Patient Response Likelihood	#
Planned Giving Likelihood	#

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

Wealth Group Fields

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

Edit a Research List

You can easily edit an existing research list. You can update:

- Criteria options
- Selection files
- Name, Description, and Category information
- Access Permissions

However, you cannot edit refresh options.

Edit a prospect Research List

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

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

2. Expand the list you want to edit.
3. Click **Edit**. The Edit research list screen appears.
4. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in ***ResearchPoint***. To include attributes in your list, select **Include attributes**. For a list of fields included with each option, see Research List Criteria Fields on page 66.

   > ***Tip:*** You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

5. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

   > ***Note:*** What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

6. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
7. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
8. In the **Save options** section, enter the following:

Note: Depending on your user role in the system, some options may be grayed out.

a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.

b. In the **Description** field, enter a description to help you identify the list.

c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.

d. You can also allow other users the access and/or edit your list.

e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.

f. Decide if you want to allow others to access and/or edit this list.

g. To make your list dynamic, which means it is automatically updated to include new prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.

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

Delete a Research List

You have the option to delete a research list from the Research Lists page or from the research list itself.

Warning: If you attempt to delete a research list on which ***WealthPoint*** updates have been performed, you cannot delete the group without first deleting the ***WealthPoint*** search history related to the research list.

How to Use Research Lists

Learn how to perform the following tasks on a research list:

- Add members to the list
- Edit the list configuration options
- Generate a research list report
- Delete the list
- Copy selected list members to another list
- Remove members

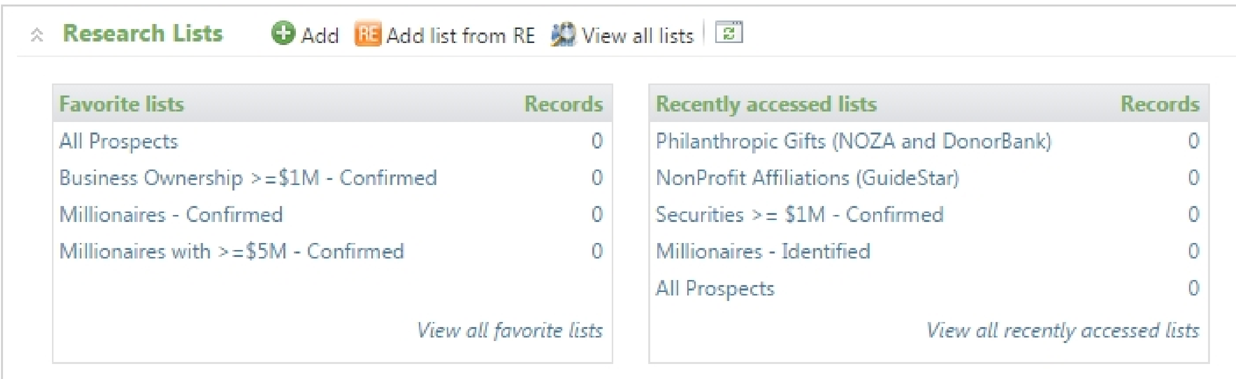
Perform WealthPoint Screenings on Research Lists

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

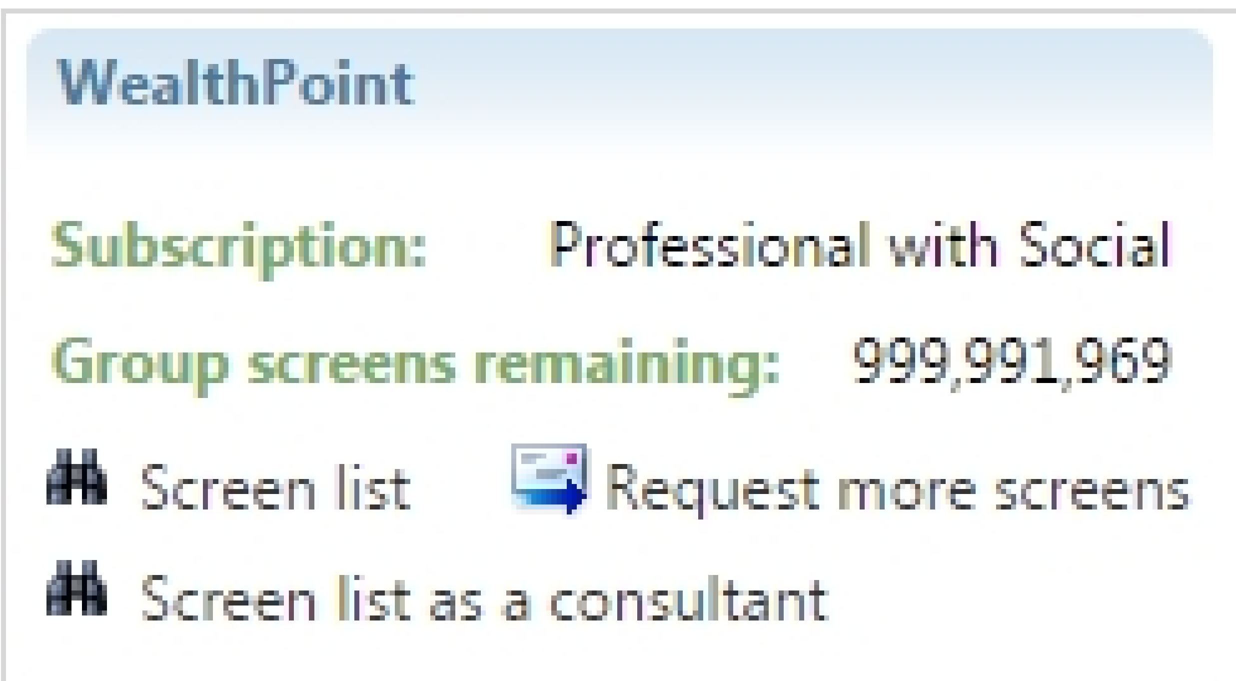
When updating ***WealthPoint*** information, the system does not override any manually entered data you stored on a given prospect. For example, if you entered real estate information for a constituent and real estate information is included in the ***WealthPoint*** screen, whatever information you entered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

Wealth screen all members of a research list

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



2. To open the research list, on the Research Lists page, in the **Name** column, click the name link.
3. In the summary section at the top of the page, click **Screen list.**

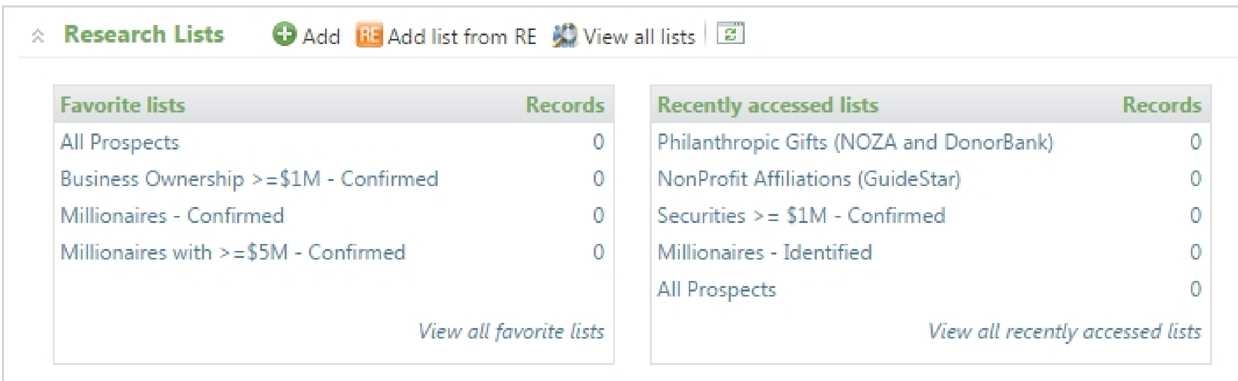


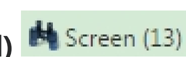
4. A confirmation screen appears. Click **Yes** to continue.

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

Wealth screen selected members of a research list

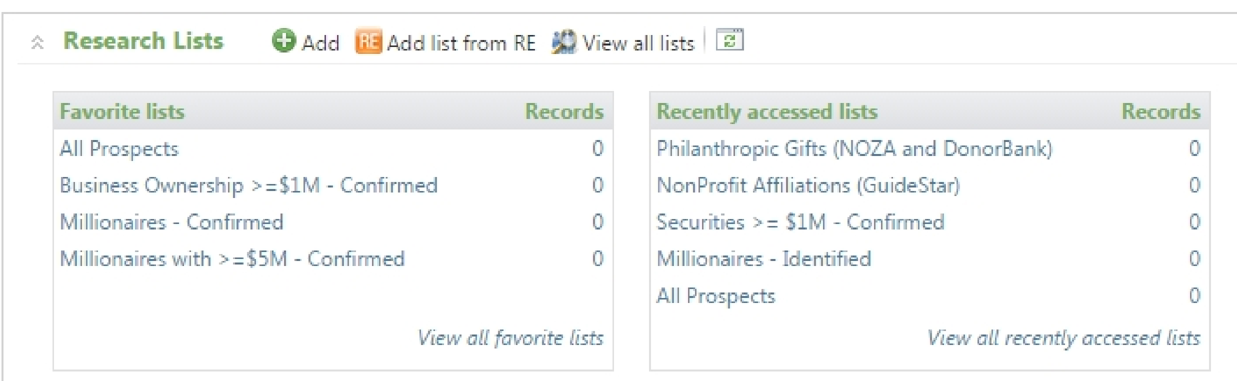
1. From *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.



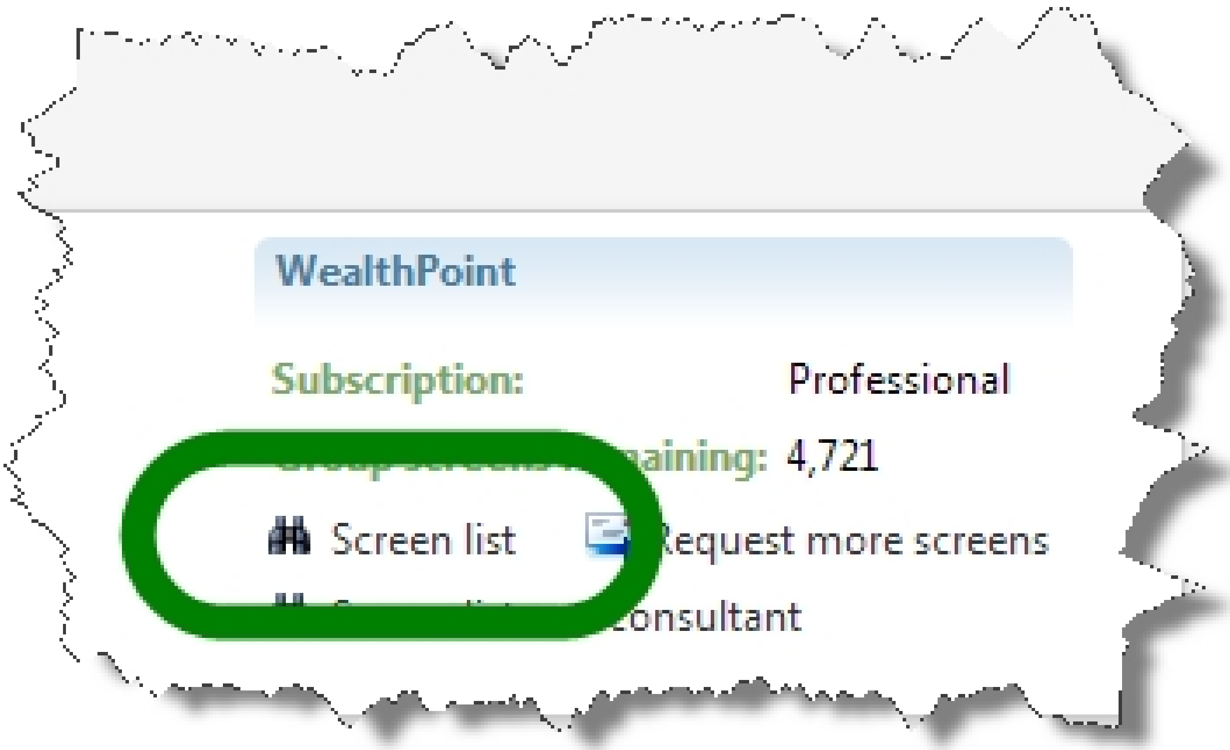
2. To open the research list, on the Research Lists page, in the **Name** column, click the name link.
3. In the **Members** list, select the checkboxes for each constituent you want to screen.
4. At the top of the **Members** list section, click **Screen (# selected)** .

Wealth screen all members of a research list

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



2. From the **Research Lists** grid on the Research Lists page, in the **Name** column click on the list you want to screen. The selected Research List appears.
3. In the summary section at the top of the page, click **Screen list.**

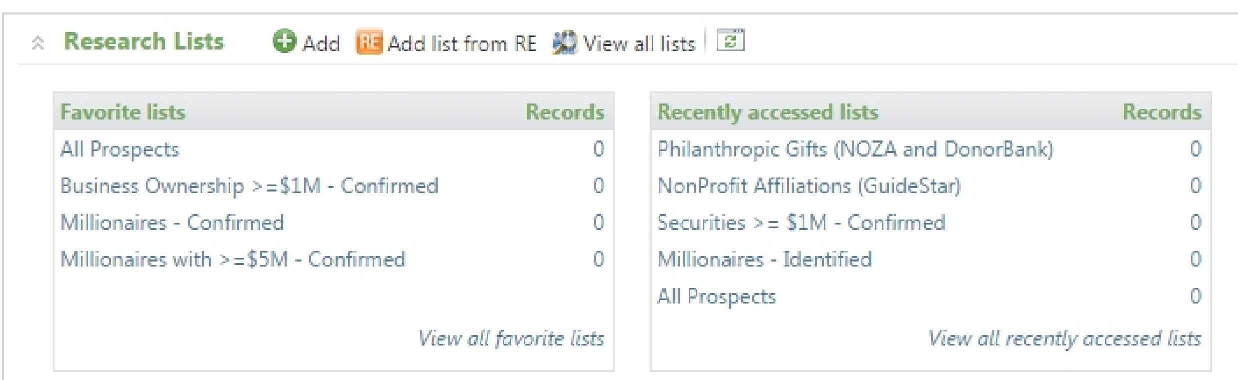


4. A confirmation screen appears. Click **Yes** to continue.

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

Wealth screen selected members of a research list

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

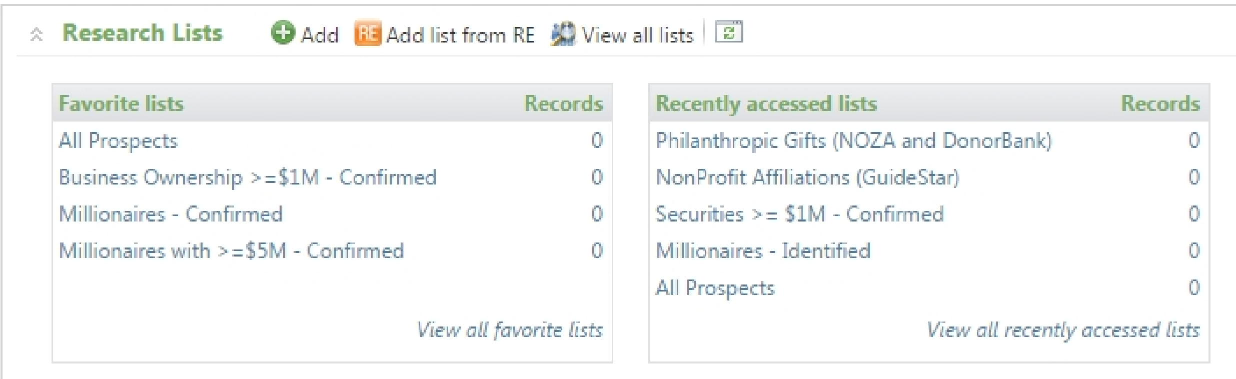


2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.

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

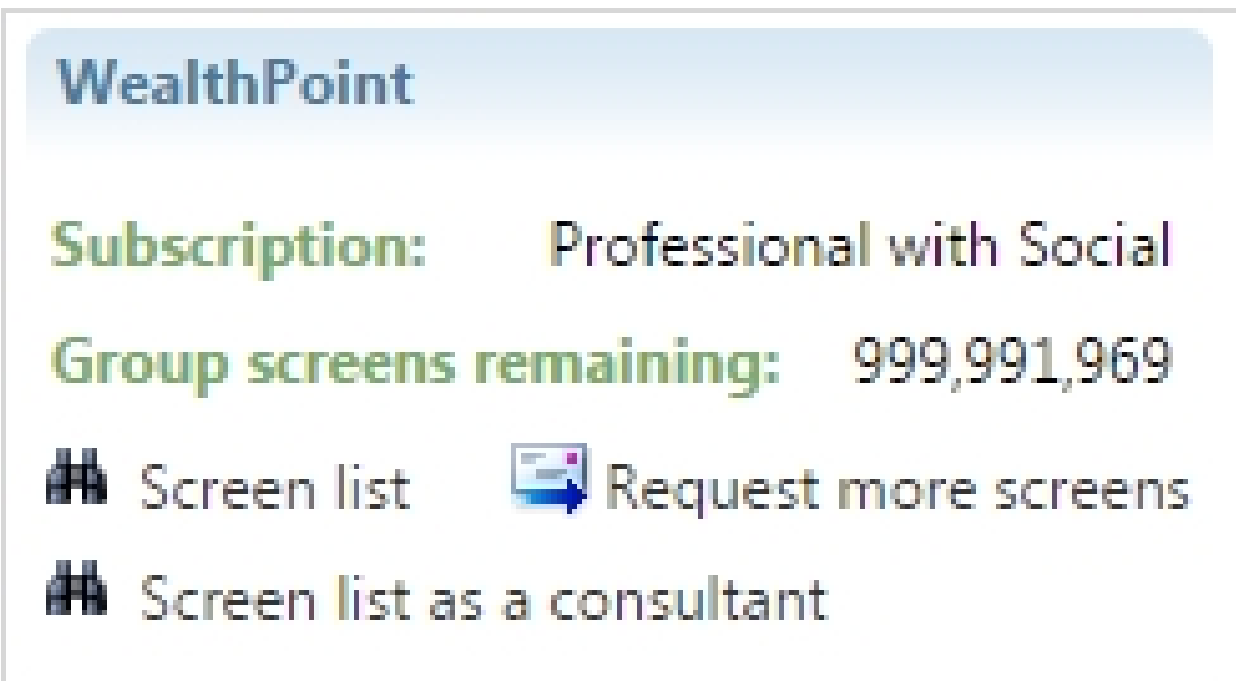
Track Number of Remaining Group Screens

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



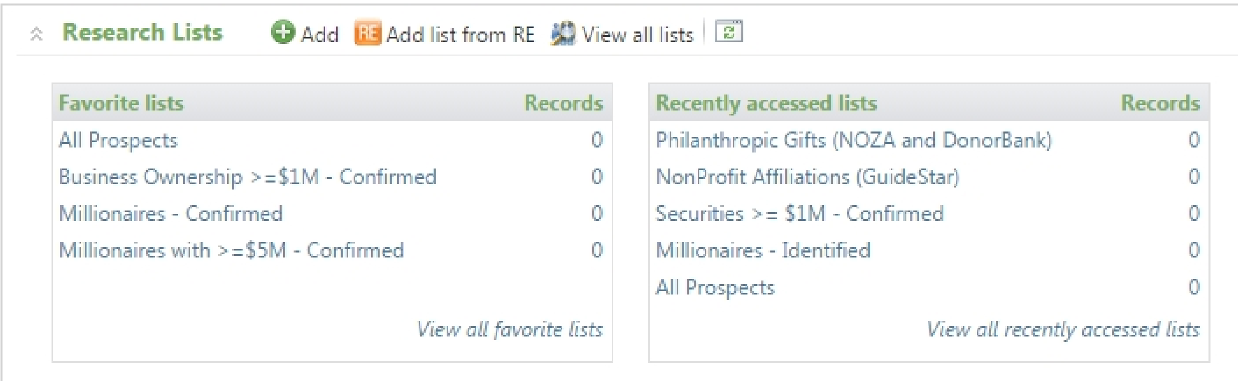
To open the research list, on the Research Lists page, in the **Name** column, click the name link.

On the top right side of the page, the **Group screens remaining** field displays the number of group screens you have left.



Request More Group Screens

On the top right side of the page, click **Request more screens.** The Request more screens screen appears.



Enter the number of screens you want to purchase. Click **OK**. An email message is sent to solutions@blackbaud.com that includes your site information and the number of additional screens you want.

Track Members of your List

View members included in a research list

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

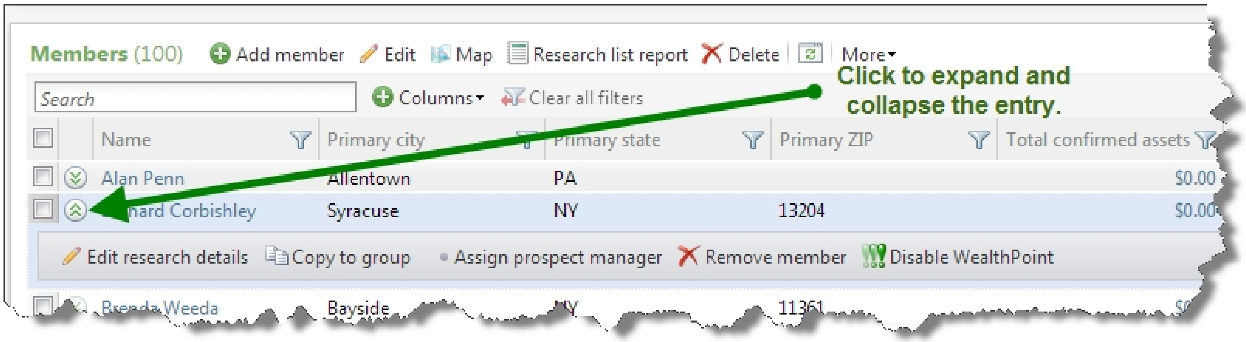
   Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

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

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

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

or disable WealthPoint screenings on this prospect.



For detailed instructions on filtering, searching, and arranging columns included in the Members grid, see Display Tips for Members List on page 237.

Add Members to a Research List

After you create a list, regardless of the method or criteria used to populate the group, you can manually add individual members, even members not satisfying your original criteria.

From a research list, in the **Members** list, click **Add member**. The Add research list member screen appears.

Click the search icon to access the Individual Search screen. From here you can search for and select the new member. You can also add constitutes to your database from the search screen by clicking the **Add** button.

Once the new member has been selected or added, from the Add research list member screen, click **Save**. The new member is added to the list.

Delete Members from a Research List

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

From the research list, select the checkboxes for the members you want to remove. When you select the members, additional actions appear. Click **Remove member (# selected)**.

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

Edit Research Details

From the following locations in ***ResearchPoint***, you can update the prospect's status and prospect manager.

- Prospect Record, Wealth Summary tab, in the Research details section, click **Edit**.
- From a research list, click the double arrows next to a list member and click **Edit research details**.

- From a household, organization, or group record in ***ResearchPoint***, on the explorer bar, under Tasks, click **Edit research details**.

Before you change the research details for a prospect, review the following about each field to understand what it means when you make the change.

When you select confirmed, you indicate that research is complete on a prospect. Do not mark the checkbox until you are confident that all your research is complete. When you save a prospect with a confirmed status, they are flagged as a major giving prospect.

We recommend in these two examples, that you do not mark the checkbox.

- If you complete an initial wealth screen on a prospect and the data found does not meet your organization's criteria as a "prospect" to pursue further, do not mark the **Confirmed** checkbox. In this situation, the research is not complete because you chose not to do any further research.
- If you complete an initial wealth screen and find a very wealthy prospect that you know your organization will want to ask for a gift, do not mark the **Confirmed** checkbox until research is complete. In this situation, you may be planning to spend more time carefully analyzing the data for the prospect. When all the research is finalized, return to the Edit research details screen and mark the checkbox then.

In the **Prospect Manager** field, assign for the first time or re-assign a prospect to a prospect manager. For example, you may find that in your research that the prospect lives full-time in a geography that is better served by a different prospect manager. Re-assign to the person who is a better fit.

The **Research summary** field is a place for you to add a summary about the prospect, which can show up in the research report. It may contain some biographic summary, some ideas on how the prospect should be solicited, and interesting tidbits that came up during your research.

Enter Research Details for List Members

From a research list, under **Members**, click the double arrows for a list member . An action bar appears for the constituent. To enter a the research summary, click **Edit research details**. For more information about how the research details fields are used in ResearchPoint, see Edit Prospect Manager from Prospect Record on page 121.

Copy List Members to a New or Existing Research List

You can copy one or a selected group of list members from your current research list to a new or existing research list. The list member retains membership on the current research list unless you decide to take action to remove.

Whether you copy one list member or several, you can search for and select an existing research list to copy the members to or you can create a new research list. The new research list has limited options but you can edit the name, description, owner, category, and whether others can access or edit the list. Once the new list is created, you can edit additional options.

Copy One Member

From a research list, under **Members**, click the double arrows for a list member . An action bar appears for the constituent. Click **Copy to list**. The Copy prospects to list screen appears.

Copy Selected List Members

If you need to copy several members, in the **Members** list, select the checkboxes for the members you want to include.

At the top of the **Members** list, click **Copy to list (number selected)**. The Copy prospects to list screen appears.

View Members Prospect Records

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

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

Disable WealthPoint Screens on Selected Members

On a research list, you can disable WealthPoint for selected members. In the **Members** list, click the double arrows for the constituent's row and click **Disable WealthPoint**.

Even when you perform a group WealthPoint screening, this constituent will not be included. The record will remain disabled in the research list until you choose to enable.

Also, if you perform this action on a research list, it disables WealthPoint screenings from their individual wealth and ratings record. You can turn WealthPoint screenings back on from either the research list or the individual wealth and ratings record.

Assign a Prospect Manager to a Research List

On a research list, you can assign a prospect manager to one or selected members.

Assign to One Member

From a research list, under **Members**, click the double arrows for a list member . An action bar appears for the constituent. Click **Assign prospect manager**. The Assign a prospect manager screen appears. Search for and select a manager. Click **Save**.

Assign to Selected Members

If you need to assign the same manager to several members, in the **Members** list, select the checkboxes for the members you want to include in the assignment.

At the top of the **Members** list, click **Assign prospect manager (number selected)**. The Assign a prospect manager screen appears. Search for and delect a manager. Click **Save**.

Map Locations of Research List Members

From the research list, in the **Members** section, click **Map**. The Mapping page appears displaying the members' locations.

Note: You can also map list members from the Research Lists page by expanding the list you want to map and clicking **Map**.

The maximum number of pushpins that can appear in Mapping is 250 list members.

For more information about Mapping, see the Mapping Guide.

Research List Report

The Research list report enables prospect researchers to prepare and print reports that include all members of a selected Research List.

Note: Report capacity is 500 records.

The report includes a detailed profile of each list member. In addition to the list member’s name and contact information, the report includes:

- **Prospect Summary**: Primary business, birth, gender, and spouse information
- **Notes**: Any notations, media links, or attachments included on the Documentation tab of the prospect’s constituent record

The details view of the report, accessed by clicking the **View details** link included on the report screen, includes additional information pulled from the prospect’s constituent record, such as constituencies and relationship data.

Generate a Research List report

From the research list, in the **Members** section, click **Research list report**.

Note: You can also generate a research list report from the Research Lists page by expanding the list you want to report on and clicking **Research list report**.

List Member Wealth Summary

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

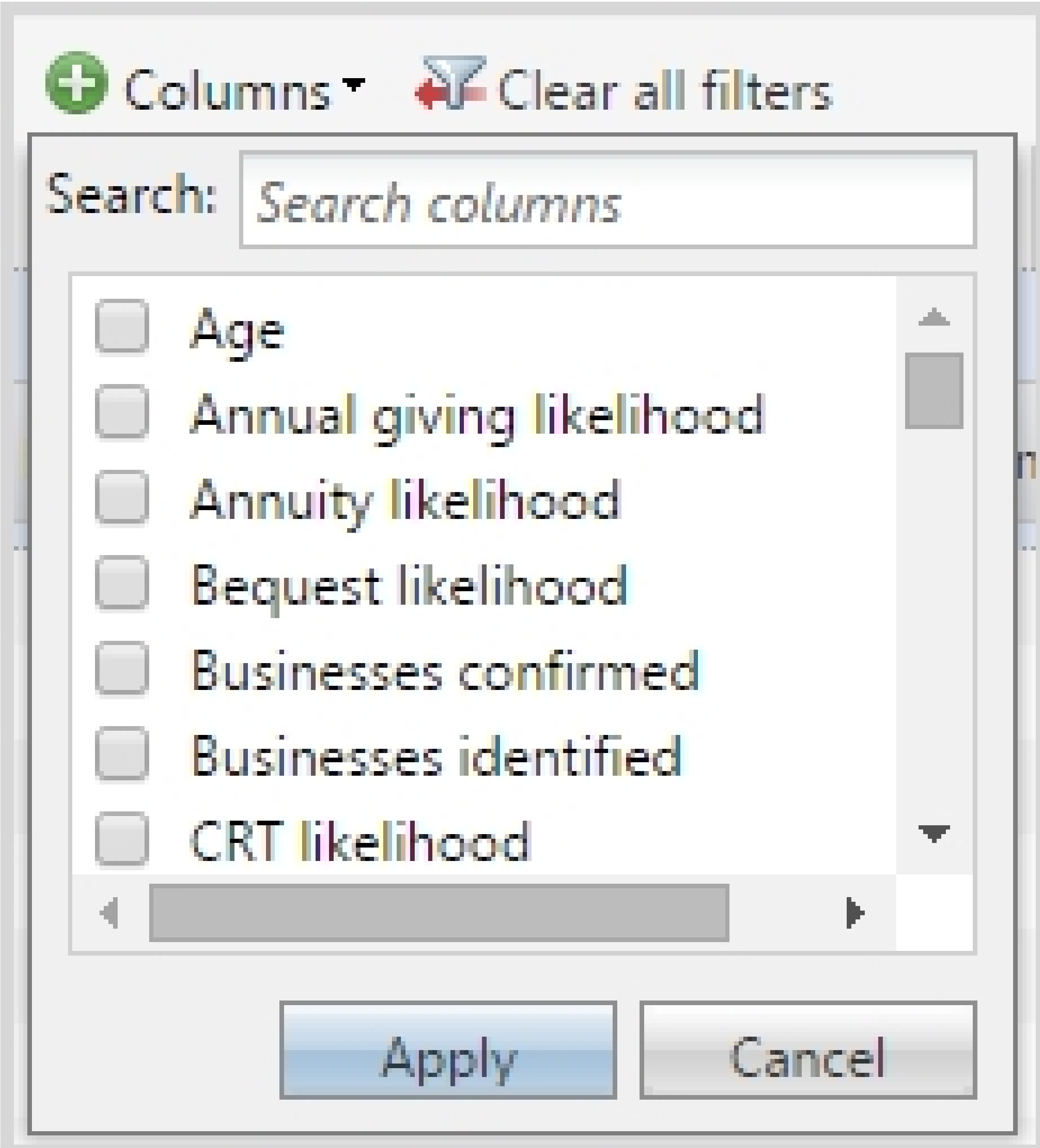
To display the Wealth summary screen, click the link in the **Total confirmed assets** or **Total identified assets** columns.

If you click a link from the Wealth summary screen, the member's wealth and ratings record opens to the location where the information came. For example, if you want to view a member's real estate information in more detail, click the **Real estate** link in the **Assets** column. The list member's wealth and ratings record opens to the Assets tab with the **Real estate** section expanded.

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

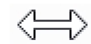


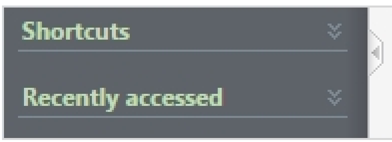
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



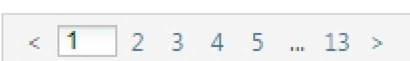
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Prospect Research Request Workflow

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

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

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

1. Gift officer determines additional research data is needed for a specific prospect.
2. Gift officer uses the **Add a Prospect Research Request** tool included in *Prospects* and submits the request for information about the prospect.
3. After submitting, the gift officer tracks the request activity from the Research Requests tab on the fundraiser record. From here, the gift officer can also access the research request record, edit or cancel the existing record, and add a new request.
4. Director of prospect research tracks, prioritizes, assigns, and generally manages prospect research requests from Research Request Management page. For more information, see Manage Submitted Research Requests on page 97.
5. Once the research is complete and ready for the gift officer, the director of prospect research designates it "Complete" from the Research Request Management page. This designation is reflected on the Research Requests tab of the fundraiser who submitted and requested the data.

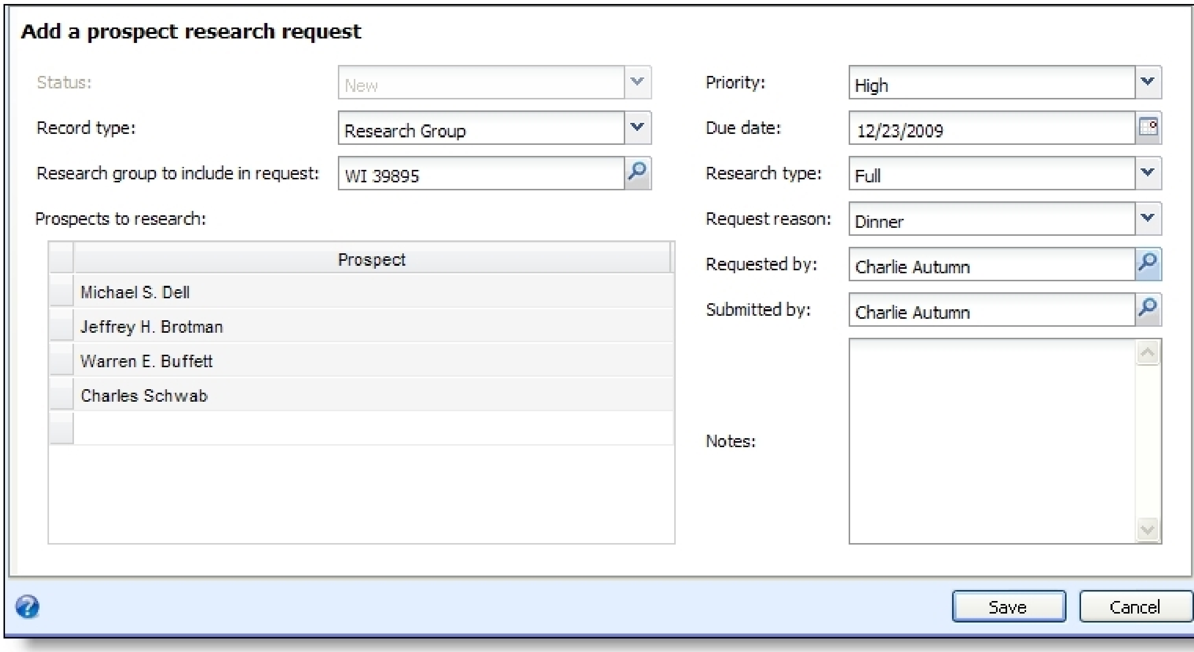
Add New Prospect Research Requests

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

Add a New Prospect Research Request

1. From the Prospect Research page, select the Research requests tab and click **Add** or from the Prospects page, under **Prospect research**, click **Add a prospect research request**.

2. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.



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

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

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

Add a Prospect Research Request Screen Fields

Screen Item	Description
Status	If you are creating a new request, “New” defaults in this field and cannot be changed. After the request is saved, the status is changed to “Pending.” This field displays the current status of your request and cannot be edited from the Research Request tool.
Record type	The available record types on which to base your request are. For example, a constituent or a Research List.
Research List to include in request	If in the **Record type** field you select Research List a new field appears. Select the group you want to research. All prospects included in the group display in the **Prospect names** grid. The number of constituents included in the grid is capped at 500.
Event to include in request	If in the **Record type** field you select Event a new field appears. Select the event you want to research. All prospects registered for the display in the **Prospect names** grid. The number of constituents included in the grid is capped at 500.
Prospects to research	If in the **Record type** field you selected “Individual” or “Organization,” in this field enter or search for the existing individual or organization constituent you want to include in your research request. Click the search icon in the field to access the search screen if you want to search for the constituent. You can enter multiple constituents in this grid. If in the **Record type** field you selected “Research List,” the constituents included in the Research List populate the grid. To remove a constituent, select the constituent name and click DELETE on your keyboard.
Priority	Select a priority for the request. Priorities are created in **Code tables** in *Administration*.
Due date	Select a date by which you need the requested information. The default date is two weeks from the current date.
Research Type	Select the type of information you need on the constituents. For example, “Full Profile” or “Financial Profile.” Types are created in **Code tables** in *Administration*.
Request Reason	Select a reason for the request. Reasons are created in **Code tables** in *Administration*.
Requested by/Submitted by	Enter or select the names of the individuals requesting the information. Click the search icon in the respective field to access the Constituent search screen. Both fields default to the constituent name linked to the application user entering the request, but the entries can be changed.
Notes	Enter any additional information you want to include with the request.
Copy research request information to linked individual requests	Select this option if you want linked individual requests to be updated to match the main request.

Add a Prospect Research Request Screen

Screen Item	Description
Status	If you are creating a new request, "New" defaults in this field and cannot be changed. After the request is saved, the status is changed to "Pending." This field displays the current status of your request and cannot be edited from the Research Request tool.
Record type	The available record types on which to base your request are. For example, a constituent or a Research List.
Research List to include in request	If in the **Record type** field you select Research List a new field appears. Select the group you want to research. All prospects included in the group display in the **Prospect names** grid. The number of constituents included in the grid is capped at 500.
Event to include in request	If in the **Record type** field you select Event a new field appears. Select the event you want to research. All prospects registered for the display in the **Prospect names** grid. The number of constituents included in the grid is capped at 500.
Prospects to research	If in the **Record type** field you selected "Individual" or "Organization," in this field enter or search for the existing individual or organization constituent you want to include in your research request. Click the search icon in the field to access the search screen if you want to search for the constituent. You can enter multiple constituents in this grid. If in the **Record type** field you selected "Research List," the constituents included in the Research List populate the grid. To remove a constituent, select the constituent name and click DELETE on your keyboard.
Priority	Select a priority for the request. Priorities are created in **Code tables** in *Administration*.
Due date	Select a date by which you need the requested information. The default date is two weeks from the current date.
Research Type	Select the type of information you need on the constituents. For example, "Full Profile" or "Financial Profile." Types are created in **Code tables** in *Administration*.
Request Reason	Select a reason for the request. Reasons are created in **Code tables** in *Administration*.
Requested by/Submitted by	Enter or select the names of the individuals requesting the information. Click the search icon in the respective field to access the Constituent search screen. Both fields default to the constituent name linked to the application user entering the request, but the entries can be changed.
Notes	Enter any additional information you want to include with the request.
Copy research request information to linked individual requests	Select this option if you want linked individual requests to be updated to match the main request.

Add Fundraisers to Prospects

When you add a fundraiser to *Prospects*, the fundraiser is accessible from the Fundraisers tab on the Fundraisers and Steps page in **Major giving management** and the Search screen accessed by clicking **Fundraiser Search** in the *Prospects* menu.

Add a fundraiser

1. From the *Prospects*, under **Prospect management,** click **Add a Fundraiser**. The Add a fundraiser screen appears.
2. In the **Constituent** field, enter the name of the fundraiser, or if the fundraiser is already a constituent in your system, click the search icon in the field so you can locate the constituent.
3. Click **Save**. If the fundraiser is not already in your system, the Search screen appears.
4. To add the fundraiser to your system, click **Add**. The Add an individual screen appears.

Manage Prospect Research Requests

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

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

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

The **Research requests** grid at the top of the tab summarizes each request, displaying date, status, record type, number of constituents, type of research requested, and researcher information. The detail view near the bottom half of the tab displays all information included on the request form, such as priority and submitted by.

Edit a Specific Prospect Request

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

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

Edit an Existing Research Request

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

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

Note: Existing notes on individuals will not be overwritten.

Track Prospect Request Status

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

Add Prospects to Research Request

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

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

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

Add Prospects to an Existing Research Request

1. From the Research Request page, under **Tasks**, click **Add prospects to request.** The Add prospects to a research request screen appears.
2. You cannot change the **Status** from this screen.
3. In the **Prospects to add** grid, add the new prospect. Click the search icon at the end of the field to access the Constituent Search screen.
4. You can also enter a **Priority**, **Due date**, **Research type**, **Request reason**, and **Notes** for the additional prospects.
5. Click **Save**. You return to the Research Request screen. Your newly added prospects display in the **Prospects** grid.

Cancel a Specific Prospect Request

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

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

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

Cancel an Existing Research Request

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

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

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

Delete an Existing Research Request

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

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

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

Research Request Record

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

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

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

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

Manage Submitted Research Requests

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

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

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

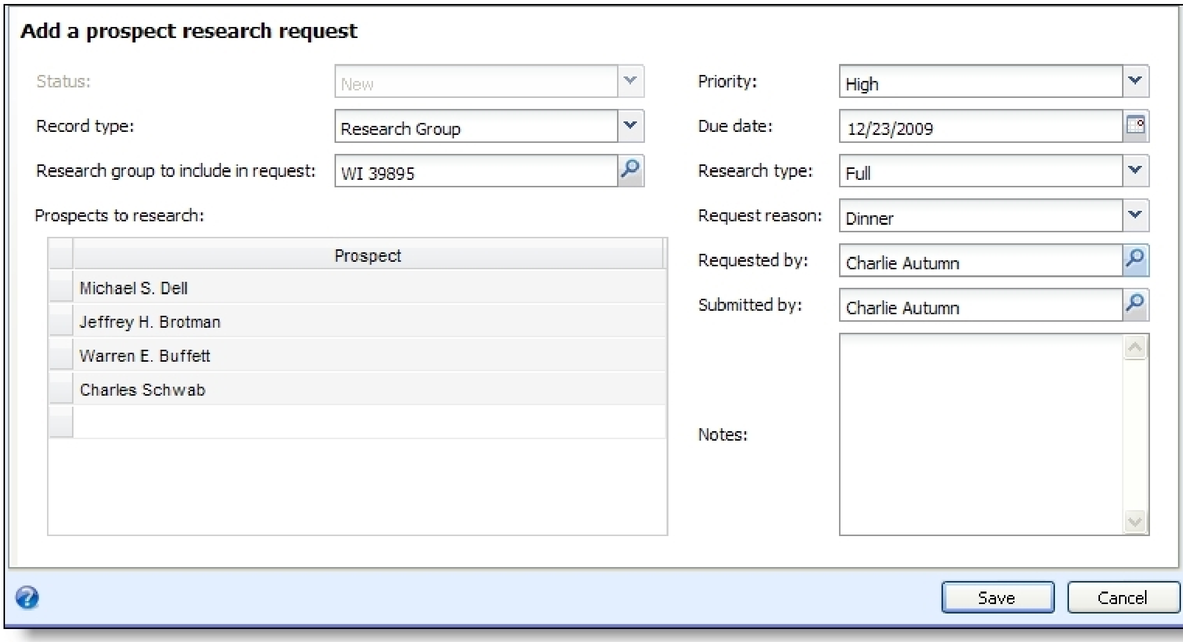
- For information on managing the main requests, which includes all individuals included in the request, see Open Requests on page 97.
- For information on managing the individual requests included within a main request, see Open Individual Request on page 100.
- For information on tracking completed requests, see Completed Requests on page 109.

Open Requests

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

Add or edit a research request from the prospect research request management page

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



4. Select the **Record type** for which you are requesting information.

   Enterprise Constituent Record Management users can also include event registrants in a research request.

5. Depending on the **Record type** select, you next must select the constituent or Research List for which you want information. For example, if you select the "Research List" **Record type,** the **Research List to include in request** field appears. Search for and select the group. After you select the group, the **Prospects to research** grid populates to include all group members.
6. The constituent (individual or organization) or Research List for which you are requesting information must exist in your database before you can create a prospect research request.
7. Enter any additional information you want to provide with the request, such as a priority, due date, or reason.
8. Click **Save**. The new research request now displays in the **Open research requests** grid.

Assign request to a researcher

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Select the request you want to change.
4. Click **Change status** and select **Assigned**. The Assign request to a researcher screen appears displaying the researcher currently assigned.
5. In the **Researcher** field, select the new fundraiser you want to assign as a researcher for this request. Click the search icon in the field to access the Fundraiser Search screen.

6. If you want all individuals included in the request assigned to this researcher, select **Assign individual requests to the same researcher**. If you would rather assign each individual separately, do not select this option. You can assign each individual request from the Individual Requests tab on the Research Request Management page.
7. Click **Save** to return to the Individual Requests tab.

Change the status of an open research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Request Queue tab. All open requests display in the **Open research requests** grid.
3. Click the drop down arrows next to the research request whose status you want to change.
4. On the bar, click **Change status**. Select the status of the open research request.
   a. **Pending**: The Research Request tab on the requesting/submitting fundraiser record now displays the request as "Pending."
   b. **Assigned**: The option to change the researcher assigned to the open research request appears.
   c. **In progress**: The **Complete request** option is activated. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as "In progress."
5. In order to change the status of an open research request, you must be the researcher assigned to the request.

Designate an open research requests as "Complete"

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

Reject an open research requests

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

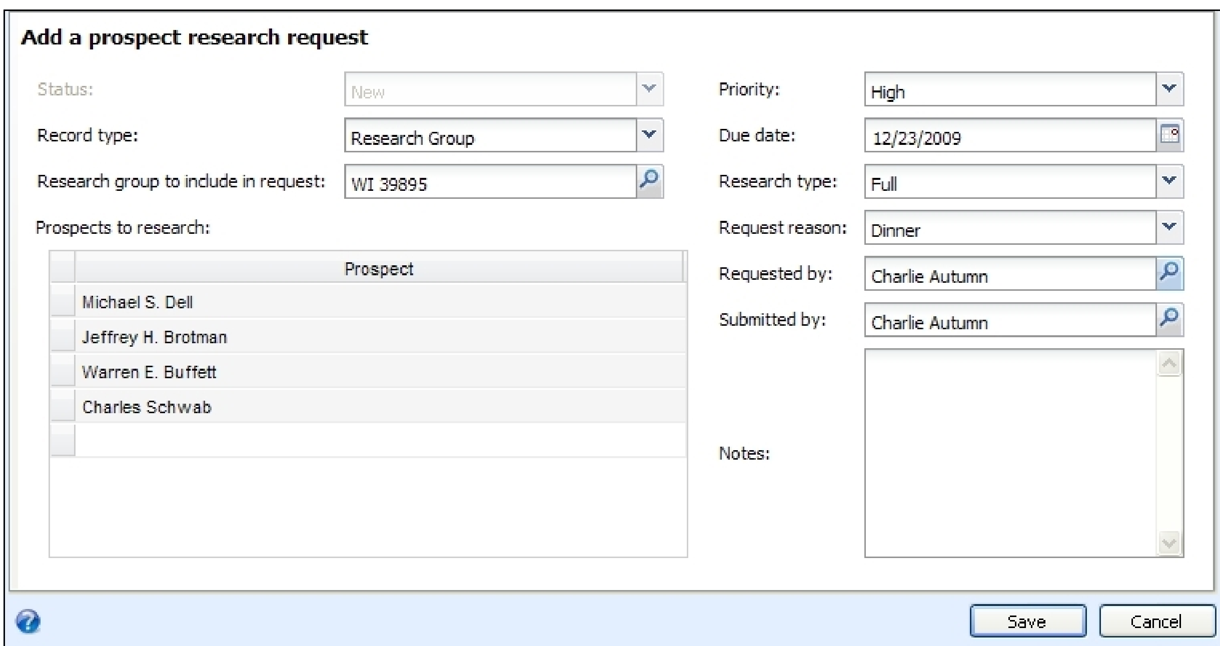
5. In the **Reason** field, select a reason for rejecting the request. Reasons are created in **Code tables** in *Administration*.
6. In the **Comments** box, enter any additional information you want to include with the rejected request.
7. Click **Save**. The status changes to “Rejected.” In addition,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

Open Individual Request

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

Add or edit an individual research request from the prospect research request management page

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



4. Select the **Record type** for which you are requesting information. For example, Individual, Organization, or Research List.
5. *Enterprise Constituent Record Management* users can also include event registrants in a research request.
6. Depending on the **Record type** select, you next must select the constituent or Research List for which you want information. For example, if you select the “Research List” **Record type,** the **Research List to include in request** field appears. Search for and select the group. After you select the group, the **Constituents to research** grid populates to include all group members.
7. The constituent or Research List for which you are requesting information must exist in your database before you can create a prospect research request.
8. Enter any additional information you want to provide with the request, such as a priority, due date, or reason.
9. Click **Save**. The constituents included in the request now display in the **Open research requests** grid.

Assign researcher to open individual research request

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

Change the status of an open individual research request

1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open individual requests display in the **Open research requests** grid.
3. Click the drop down arrows next to the individual research request whose status you want to change.
4. On the bar, click **Change status**. Select the status of the open individual research request.
    a. **Pending**: The Research Request tab on the requesting/submitting fundraiser record now displays the request as “Pending.”

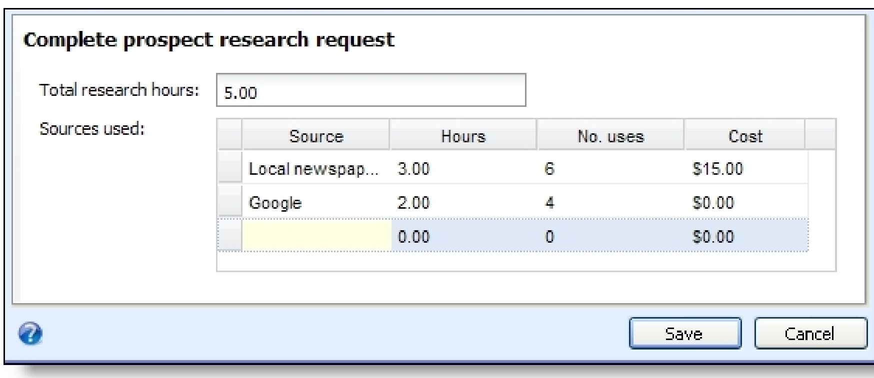
b. **Assigned**: The option to change the researcher assigned to the open individual research request appears. For more information, see Change the researcher currently assigned to an open individual research request on page 104.

c. **In progress**: The **Complete request** option is also activated. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as "In progress."

> ***Note:*** In order to change the status of an open individual research request, you must be the researcher assigned to the request.

Designate an open individual research request as "Complete"

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



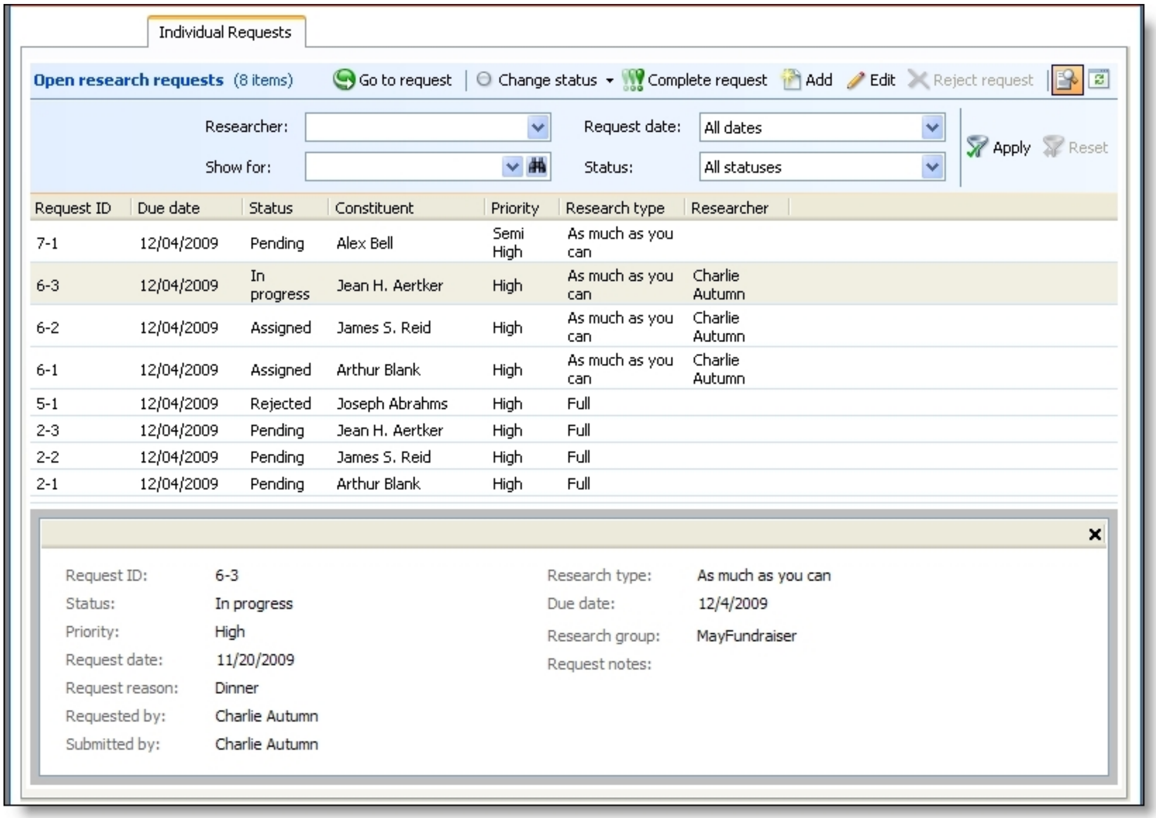
5. Record information about how the research was completed:
   - **Total research hours**: The total amount of time spent completing the research.
   - **Source** column: Where you located the information.
   - **Hours** column: How much time you spent with the corresponding **Source**.
   - **No. uses**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

Reject an open individual research request

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

View open individual research request

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



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

Assign researcher to open individual research request

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

Change the researcher currently assigned to an open individual research request

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

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

Unassign a researcher from an open individual research request

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

Change the status of an open individual research request

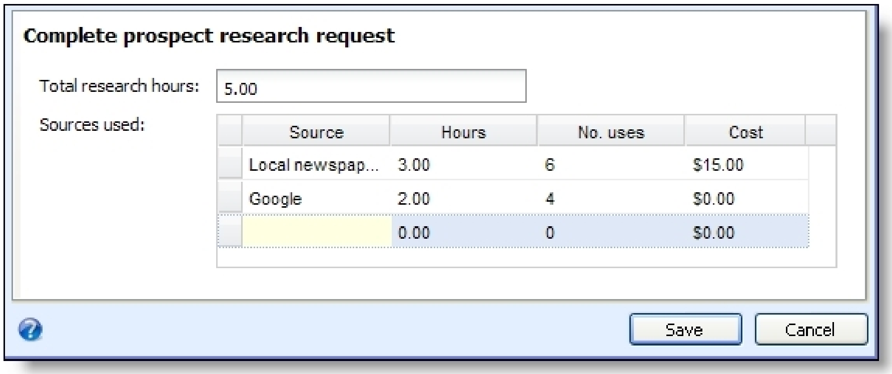
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open individual requests display in the **Open research requests** grid.
3. Click the drop down arrows next to the individual research request whose status you want to change.
4. On the bar, click **Change status**. Select the status of the open individual research request.
   a. **Pending**: The Research Request tab on the requesting/submitting fundraiser record now displays the request as "Pending."
   b. **Assigned**: The option to change the researcher assigned to the open individual research request appears. For more information, see Change the researcher currently assigned to an open individual research request on page 104.
   c. **In progress**: The **Complete request** option is also activated. In addition, the Research Request tab on the requesting/submitting fundraiser record now displays the request as "In progress."

Note: In order to change the status of an open individual research request, you must be the researcher assigned to the request.

Designate an open individual research request as "Complete"

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

2. Select the Individual Request tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to designate as "Complete."
4. Click **Complete request**. The Complete prospect research request screen appears.



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

Reject an open individual research request

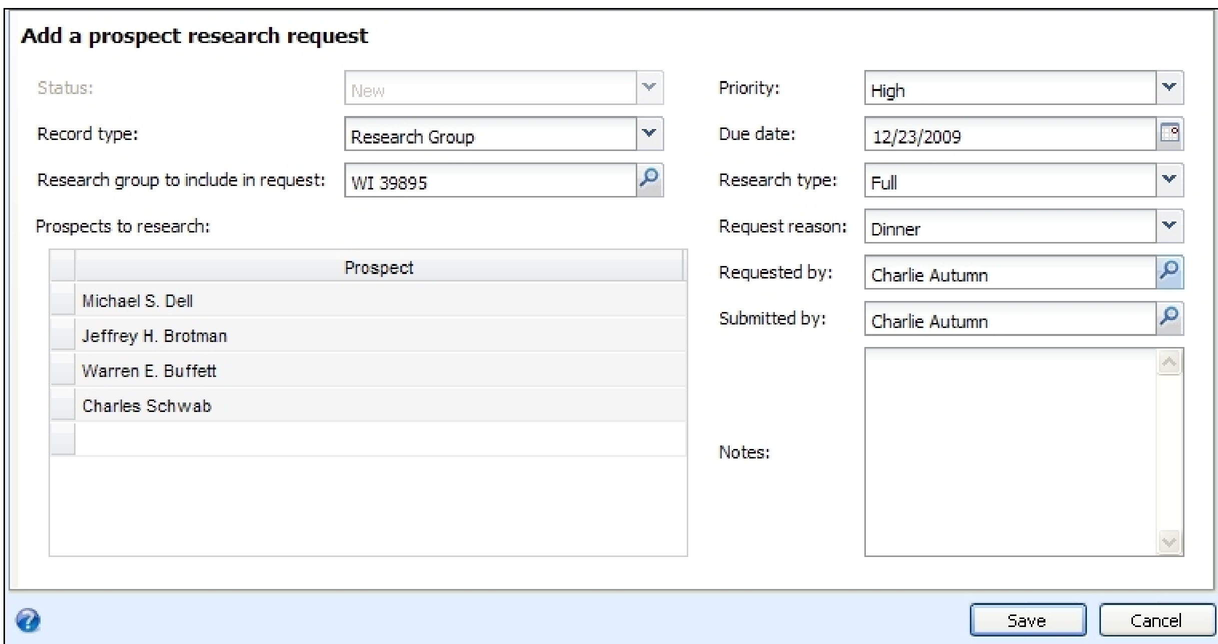
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Individual Requests tab. All open individual requests display in the **Open research requests** grid.
3. Select the request you want to reject.
4. Click **Reject request**. The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

View research request record

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

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

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



4. Select the **Record type** for which you are requesting information. For example, Individual, Organization, or Research List.

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

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

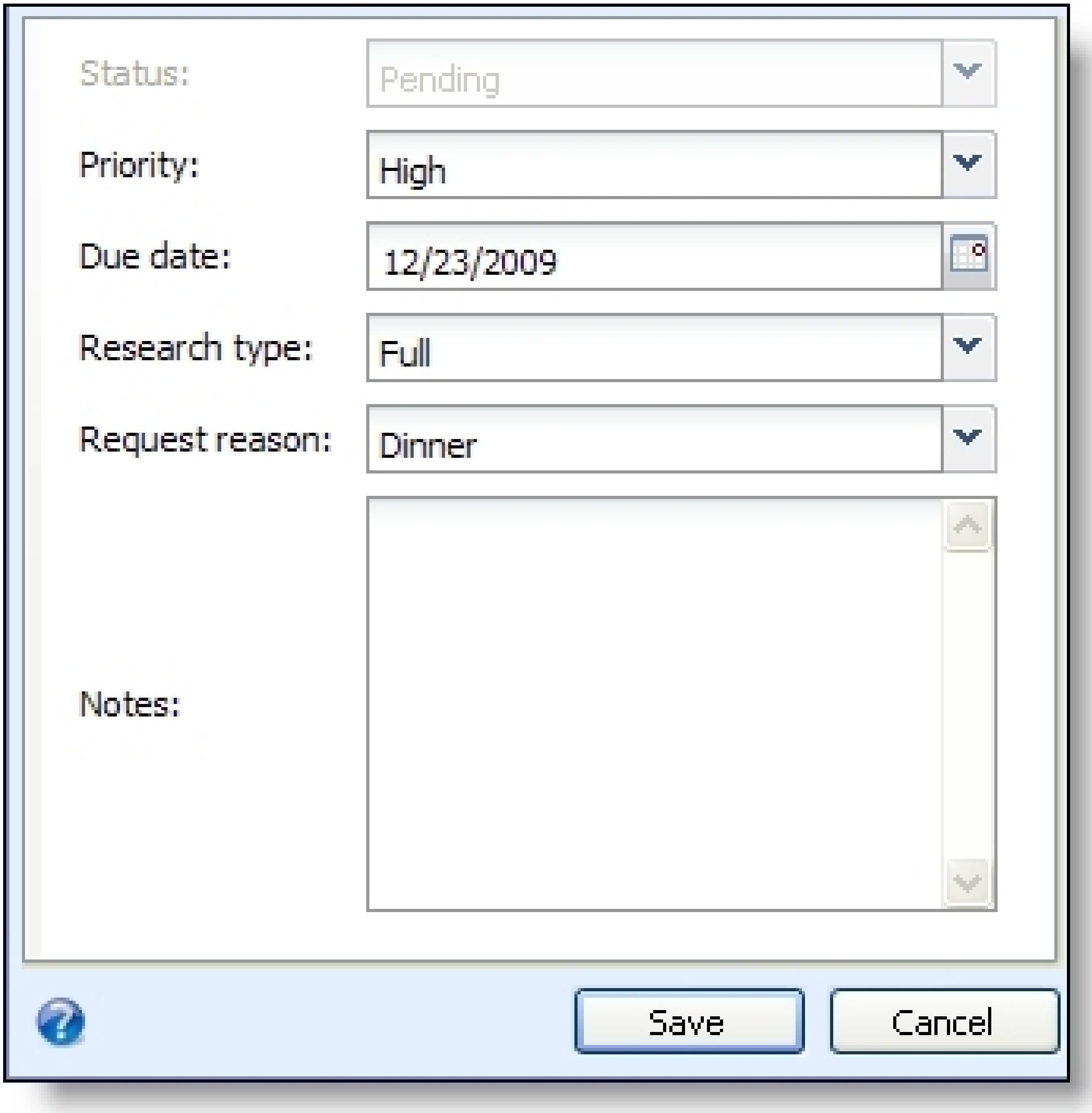
the **Research List to include in request** field appears. Search for and select the group. After you select the group, the **Constituents to research** grid populates to include all group members.

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

6. Enter any additional information you want to provide with the request, such as a priority, due date, or reason.
7. Click **Save**. The constituents included in the request now display in the **Open research requests** grid.

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

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



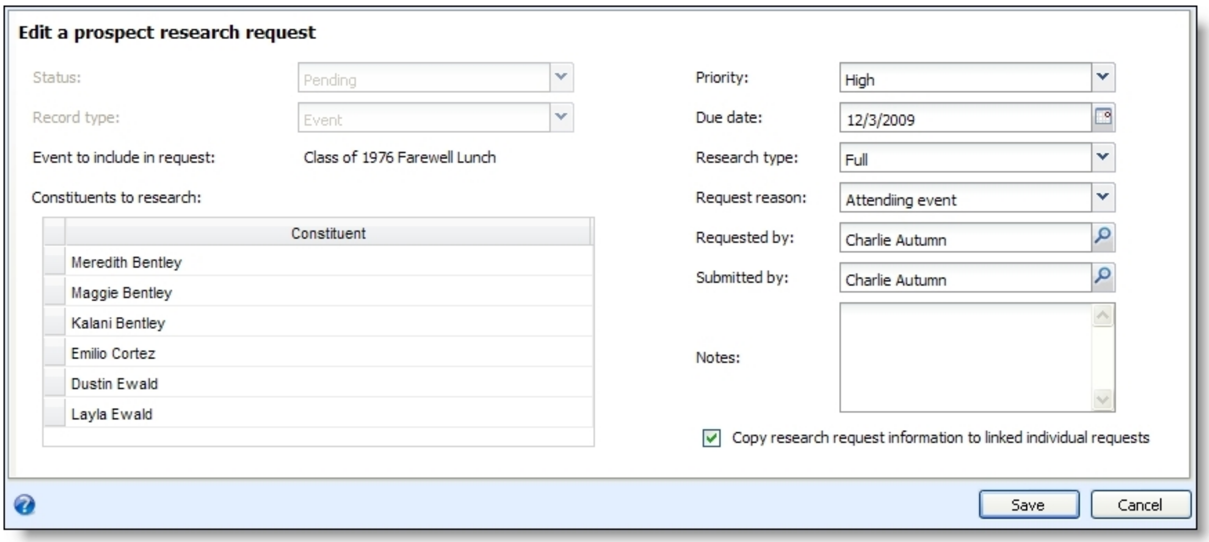
4. The constituent's **Status** cannot be changed. You can change the following options: **Priority, Due date**, **Research type**, **Request reason**, and **Notes**.
5. Click **Save** to save the changes.

Completed Requests

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

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

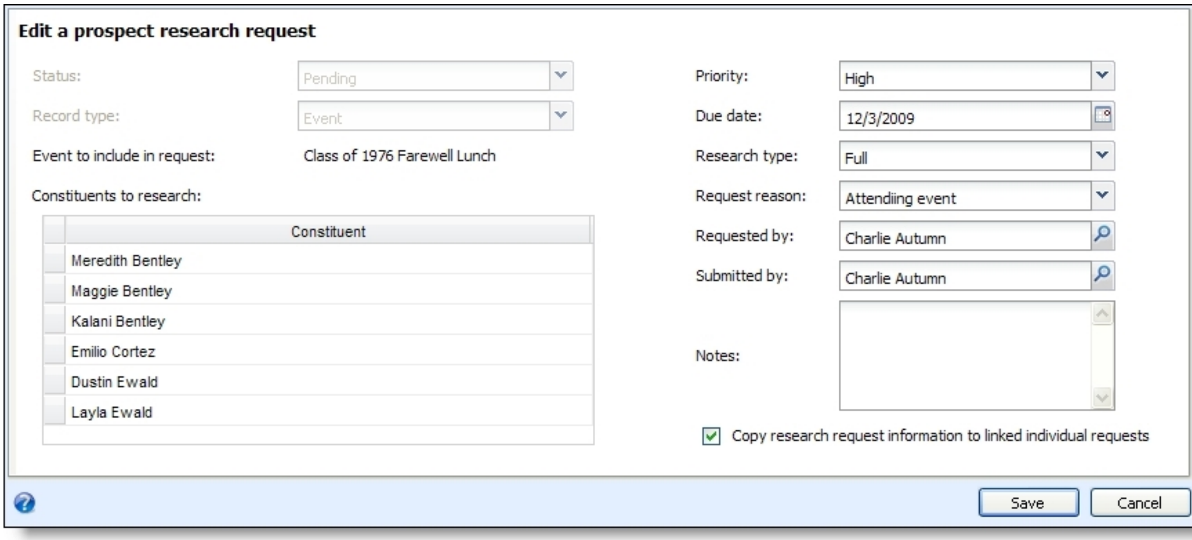
1. From the Prospects page, click **My prospect research page**. The Research Request Management page appears.
2. Select the Completed Requests tab.
3. In the **Completed research requests** grid, select the request you want to edit.
4. Click **Edit**. The Edit a prospect research request screen appears.



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

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

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



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

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

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

Establish User Permissions for Prospect Research Request Management

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

Add user permissions for Prospect Research Request Management

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

Track Constituent Research Requests

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

Click on the message box to open the notifications screen.

You can also access this information from the constituent record, volunteer record, event registrant record, and so on. This allows users in all areas of the application to know when a research request has been issued for a constituent.

Fundraiser Management

The Fundraiser page in *Prospects* tracks individual fundraiser information. From this page, fundraisers can view a summary of their prospects and where they stand in the process, step and opportunity information, prospect plan assignments, and more.

For each step in a major giving plan, you can assign the interaction to a specific fundraiser, the step owner, and associate additional fundraisers with the interaction. All fundraisers you add to the step receive credit for the activity. In prospect reports and KPIs, you can view information for all fundraisers who participated in the interaction, or you can limit the results to only step owners. From a fundraiser record, you can also view all pending, planned, or completed steps associated with the fundraiser or only steps owned by the fundraiser.

You can access the Fundraiser page from a number of locations in *Prospects* and other areas of the program.

From the *Prospects* page, select **Search Fundraiser**. The Fundraiser Search screen appears. Enter your search criteria and click **Search**. All possible matches appear in the **Results** grid. To view the record for the fundraiser, select the fundraiser you want to view and click **Select**.

The Fundraiser page in *Prospects* tracks individual fundraiser information. From this page, fundraisers can view a summary of their prospects and where they stand in the research request process. Prospect researchers assigned to the research request, manage the prospect research requests on the My prospect research request page.

To review the status of research request, if you are the fundraiser, from the *Prospects* page, click **My Fundraiser page**.

Note: If a fundraiser's **Application User** is linked to a constituent, and the constituent has the Fundraiser constituency of entered on their Constituencies tab, the fundraiser can access the Fundraiser page. For example if Dale Baker is a fundraiser, he should have access to his Fundraiser page. To accomplish this, his Application User record must be linked to his Constituent record (which has a constituency of Fundraiser).

Search for a Fundraiser

Before you add a fundraiser to your database, to avoid duplicates, you should first search your database to make sure the fundraiser is not already entered. Once you add a fundraiser, you can use the search screen at any time to find the fundraiser in your database.

1. From *Prospects*, click **Search fundraisers**. The Fundraiser Search screen appears.

When you search for a fundraiser, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need. For example, you can use name and address fields. For searches returning more than 100 records, only the first 100 appear in the results.

2. Enter the search criteria to use, such as name and address information, to find the fundraiser record. To match the search criteria exactly as entered, select **Match all criteria exactly**.

Tip: If you do not select **Match all criteria exactly**, you can use "wildcard" characters in place of parts of search criteria, such as if you are unsure of an exact spelling. To replace a group of characters, use an asterisk (*) or percent sign (%). To replace a single character, use a question mark (?) or an underscore (_). For example, to return all fundraisers with a last name that ends with "son" such as Johnson and Williamson, enter "*son" or "%son" as the last name. To find the last name of Smith or Smyth, enter "Sm?th" or "Sm_th".

3. To use additional search criteria, click **Show advanced search options**. Under **Advanced search options**, select the criteria options to include. For example, select the fundraiser types to return in the results and select whether to include nicknames and only primary addresses in the search.
4. Click **Search**. The program searches the database for fundraisers that match the search criteria entered. In the **Results** grid, the fundraisers that match the criteria appear. Depending on the search criteria you enter, the search may return one fundraiser or many.
5. In the **Results** grid, select the fundraiser record to open and click **Select** on the action bar. The fundraiser record opens.

   If the fundraiser you want does not appear in the **Results** grid, click **Add** on the action bar to add the fundraiser to the database.

Fundraiser Search Screen

The table below explains the items on the Fundraiser Search screen.

Screen Item	Description
Last/Org/Group name and **First name**	Enter the name of the fundraiser to find. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return fundraisers named Smith.
Lookup ID	Enter the primary identifier used at your organization. You can enter the entire ID or only the beginning digits. For example, if you enter "1", all lookup IDs that begin with the number 1 appear.
Site	You can base your search on the site in which the fundraiser is located.
Address	Enter the street address or post office box of the fundraiser to find, such as 7930 Baker Street. To search only by street name, use a wildcard character in place of the street number, such as "*Baker Street" or "%Baker Street".
City	Enter the city or town of the fundraiser to find.
State	Select the state of the fundraiser to find.
ZIP/Postal code	Enter the zip code of the fundraiser to find.

Screen Item	Description
Match all criteria exactly	To use search criteria exactly as entered, select this checkbox. If you select this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered.
Search in	When you click **Show advanced search options**, this field appears. Select the type of fundraisers to include in the search.
Check nickname	When you click **Show advanced search options**, this checkbox appears. To include nicknames from the Personal tab of individual fundraiser records in your search, select this checkbox and enter the nickname in the **First name** field.
Check aliases	When you click **Show advanced search options**, this checkbox appears. To include aliases from the Names tab of fundraiser records in your search, select this checkbox and enter the alias in the name fields.
Check merged constituents	When you click **Show advanced search options**, this checkbox appears. To include constituents merged from a duplicate constituent check, select this checkbox.
Check alternate lookup IDs	When you click **Show advanced search options**, this checkbox appears. To include alternate lookup IDs in your search, select this checkbox and enter the alternate lookup ID in the **Lookup ID** field.
Only search primary addresses	When you click **Show advanced search options**, this checkbox appears. To include only the primary addresses from the Contact tab of the fundraiser records in your search, select this checkbox and enter the primary address information in the address fields.
Include deceased	When you click **Show advanced search options**, this checkbox appears. To include fundraisers marked as deceased in the search, select this checkbox.
Include inactive	When you click **Show advanced search options**, this checkbox appears. To include fundraisers marked as inactive in the search, select this checkbox.
Include fuzzy search on name	When you click **Show advanced search options**, this checkbox appears. To return fundraisers with names that sound like the search criteria entered, select this checkbox. For example, if you select this checkbox and enter a last name of "Smith", the program includes fundraisers named "Smyth" in the results.
Results	When you click **Search**, this grid displays the fundraisers that match the search criteria entered. For searches that return more than 100 fundraisers, only the first 100 appear.
Add	To add a new fundraiser, such as if the fundraiser you want does not appear in the search results, click this button on the action bar of the **Results** grid to add the fundraiser to the database.
Select	To open the record of a fundraiser in the search results, select the fundraiser in the **Results** grid and click this button on the action bar.

View Fundraisers

You can access the Fundraiser page from a number of locations in *Prospects* and other areas of the program.

From the *Prospects* page, select **Search Fundraiser**. The Fundraiser Search screen appears. Enter your search criteria and click **Search**. All possible matches appear in the **Results** grid. To view the record for the fundraiser, select the fundraiser you want to view and click **Select**.

If you are the fundraiser, from the *Prospects* page, click **My Fundraiser page**.

Note: If a fundraiser's **Application User** is linked to a constituent, and the constituent has the Fundraiser constituency of entered on their Constituencies tab, the fundraiser can access the Fundraiser page. For example if Dale Baker is a fundraiser, he should have access to his Fundraiser page. To accomplish this, his Application User record must be linked to his Constituent record (which has a constituency of Fundraiser).

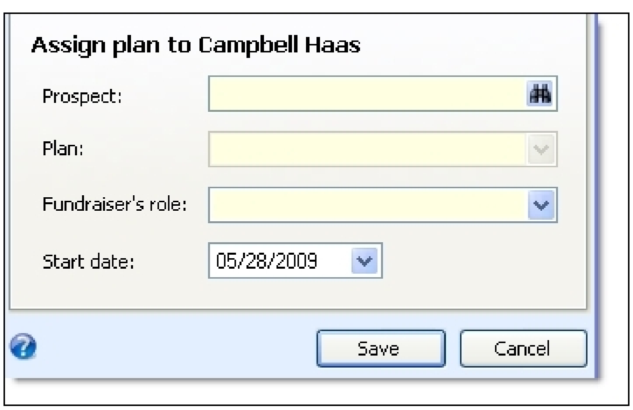
Assign New Prospect Plan - Users with Full-Rights Role

From the **Prospects and plans** section on the Prospects and Plans tab in a fundraiser, you can assign the fundraiser a new prospect and prospect plan. The plans outline your organization's strategies for winning a donation from a prospect.

Note: Full-rights users and system administrators only should have access to the **Assign plan** link. When the request is saved, the new assignment is executed. No additional approval is necessary.

Add a prospect and plan assignment to a fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** section, click **Assign plan**. The Assign plan screen appears.



3. After you complete the Assign plan screen, click **Save** to save the new assignment. The assignment takes place immediately.

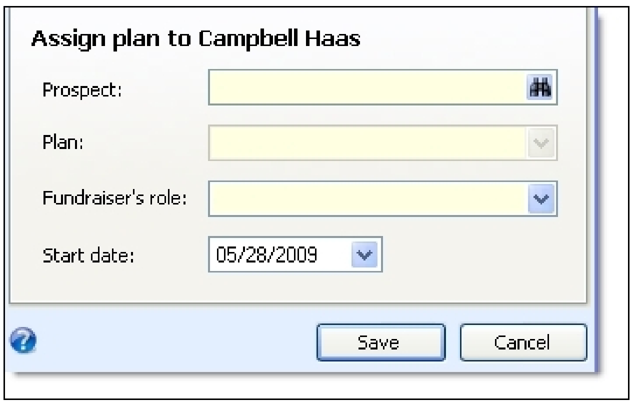
Assign New Prospect Plan - Users with Full-Rights Role

From the **Prospects and plans** section on the Prospects and Plans tab in a fundraiser, you can assign the fundraiser a new prospect and prospect plan. The plans outline your organization's strategies for winning a donation from a prospect.

Note: Full-rights users and system administrators only should have access to the **Assign plan** link. When the request is saved, the new assignment is executed. No additional approval is necessary. Users in need of approval before they can make changes to the fundraiser should see Request New Prospect Plan Assignment - Users with Restricted Role on page 144.

Add a prospect and plan assignment to a fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** section, click **Assign plan**. The Assign plan screen appears.



3. After you complete the Assign plan screen, click **Save** to save the new assignment. The assignment takes place immediately.

Assign Plan Screen Fields

From the Assign plan screen, you can add new prospects and prospect plans to the selected fundraiser.

Screen Item	Description
Prospect	Click the binoculars button to access a search screen and locate the prospect you want to assign this fundraiser.
Plan	If your organization creates plans detailing how to cultivate prospects for specific gift types, select the plan you want to associated with this prospect to win the specific gift.
Fundraiser's role	Select the role you want the selected fundraiser to play in this cultivation effort (primary manager, secondary manager, secondary solicitor).
Start date	Enter the date so start the plan. Today's date is the default.

Add Fundraiser as Prospect Manager to a Prospect

From the **Prospect assignment** section of the Prospects and Plans tab on a fundraiser, you can assign the fundraiser as a Prospect Manager to prospects in your system.

Assign a fundraiser as prospect manager to a prospect

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospect assignments** section, click **Add**, **Prospect manager**. The Add a prospect manager assignment screen appears.
3. Locate the prospect to whom you want to assign this fundraiser as prospect manager.
4. Click **Select** to return to the fundraiser.

Select a Household Member as Fundraiser

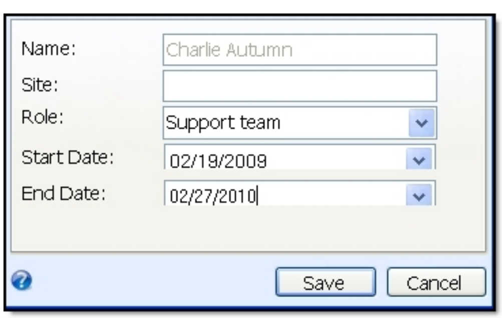
If while searching for a fundraiser to add to *Prospects* you select a household, the Select household member screen appears. From this screen you select which household member you want to add as a fundraiser. All existing members are listed in the drop-down menu. To add a new member, click the add icon at the far right of the **Household member** field. The Add a household member screen appears. Any member you add from this screen is then added to the constituent household.

Edit Assigned Prospect

From the **Prospect assignments** section on the Prospects and Plans tab in a fundraiser, you can change the fundraisers prospect assignment, assigning a different prospect manager and changing the prospect's status.

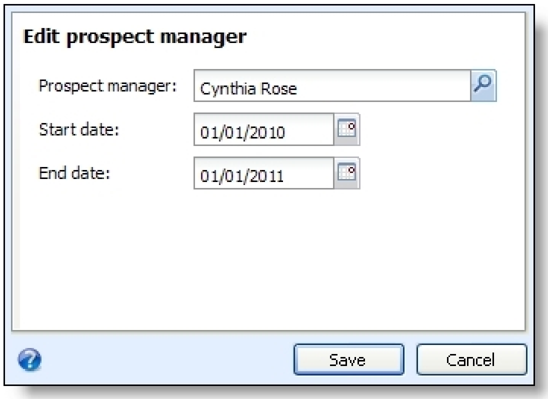
Edit prospect assignment

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospect assignments** section, select the prospect you want to edit.
3. Click **Edit**. The screen that appears depends of the type of relationship the fundraiser has with the prospect. If the fundraiser is a team member, the edit team member screen appears.



4. Enter details about the prospect team member.

5. Click **Save**. You return to the fundraiser record.
6. If the fundraiser is the prospect manager, the Edit prospect manager screen appears.



7. In the **Prospect manager** field, the fundraiser currently assigned appears. Click the binoculars to access the search screen and locate the new prospect manager. Click **Select** to return to the Edit prospect details screen.
8. In the **Start date** and **End date** fields, you can enter date information to define the length of this prospect manager's relationship with the prospect.
9. If you entered a start date when you created the prospect manager request for the fundraiser, this date automatically appears in the **Start date** field.
10. Click **Save**. You return to the Prospects and Plans tab

Edit Team Member Screen Fields

Screen Item	Description
Name	The selected fundraiser's name defaults in this display-only field.
Site	If the fundraiser is associated with a specific location, you can enter this information in the **Site** field.
Role	Select the fundraiser's role on the fundraising team.
Start Date	Date the fundraiser became a team member.
End Date	Date the fundraiser ended his relationship with the prospect as a team member.

Edit Fundraisers Assigned a Prospect from Fundraiser Record

From the **Prospects and plans** section on the Prospects and Plans tab in a fundraiser, you can change the fundraisers assigned to a prospect. Click **Edit** and select **Primary manager**, **Secondary manager**, or **Secondary solicitors** to update the fundraisers assigned the prospect.

Fundraiser Screen

Screen Item	Description
Primary manager	Click the binoculars button to access the Search screen and locate the primary prospect manager you want to assign this prospect plan.
Secondary Manager	Click the binoculars button to access the Search screen and locate the fundraiser you want to assign as a backup or secondary manager (if any) for this prospect plan.
Secondary solicitors	In this grid, click the binoculars button to access the Search screen and locate the fundraiser you want to assign as Secondary solicitor (if any) for this prospect plan.
Role	Select the **Role**, if any, the **Secondary solicitor** plays. For example, the S**econdary solicitor** may be a "Board Member" or "Volunteer".
Search Screen	Locate the record you want to use from this screen. Enter the criteria on which you want to base your search. Complete as many fields as you like, and you do not have to completely fill in any field. For example, if you know the last name begins with Sm, you can enter "Sm"in the **Last/Org name** field. To run a search based strictly on your search criteria, mark **Match all criteria exactly**. You can also choose to **Include Deceased** and **Inactive** individuals. If you choose to include address information in your search, mark **Only search primary address** if you want the program to look only in address records designated as "Primary" on the constituent record. Click **Search** to start the search. All records satisfying your criteria appear in the Results grid in the bottom half of the screen. Select the record you want, and click **Select**.

Edit Groups of Secondary Solicitors

From the **Prospects and plans** section on the Prospects and Plans tab in a fundraiser, you can group edit secondary solicitors assigned the prospect (as opposed to editing one at a time from the Plan page).

Edit secondary solicitors assigned to a prospect

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** section, select the prospect you want to edit.
3. Click **Edit, Secondary solicitors**. The Edit secondary solicitors screen appears.
4. In the **Secondary solicitors** column, select the solicitor you want to add. Click the binoculars at the end of the field to access a search screen and search for the solicitor.
5. In the **Role** column, you can enter the selected solicitor's role in soliciting the prospect.

6. In the **Start date** and **End date** fields, you can define the length of time the selected fundraiser is to work with the prospect in the specified role.
7. Click **Save** to save the assignments and return to the Prospects and Plans tab.

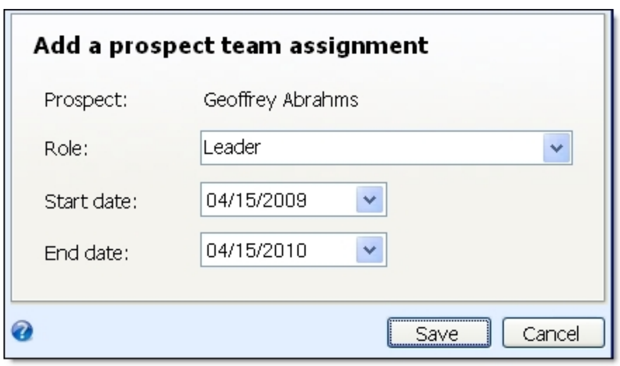
Add Fundraiser as Team Member to a Prospect

From the **Prospect assignment** section of the Prospects and Plans tab on a fundraiser, you can assign the fundraiser as a team member to prospects in your system.

Note: If, in addition to the development officers and other fundraising resources assigned a prospect through prospect plans, you need to include additional individuals who also have an interest in the cultivation activities associated with the prospect outside of the plan - such as a senior development officer or prospect researcher, you can add these individuals a "team" members.

Assign a fundraiser as team member to a prospect

1. From the fundraiser, select the Prospects and Plans tab.
2. Click **Add**, **Prospect team assignment**. The Prospect Search screen appears.
3. Locate the prospect to whom you want to assign this fundraiser as a team member.
4. Click **Select**. The Add a prospect team member screen appears.


Add a prospect team assignment
Prospect: Geoffrey Abrahms
Role: Leader
Start date: 04/15/2009
End date: 04/15/2010
Save Cancel

The selected prospect's name defaults in the **Prospect** field.

5. Enter role and date information.
6. Click **Save**. You return to the fundraiser record.

Edit Prospect Manager from Prospect Record

If while working in a prospect record, you discover you must change the prospect manager assigned to the prospect, you can by simply clicking the **Edit prospect manager** link in the **Tasks** frame. The Edit prospect manager screen appears, allowing you to make these necessary changes.

In the **Start date** and **End date** fields, you can enter date information to define the length of this prospect manager's relationship with the prospect.

If you entered a start date when you created a prospect manager request for the fundraiser, this date automatically appears in the **Start date** field.

In the **Prospect manager** field, the fundraiser currently assigned appears. Click the binoculars at the end of the field to access the search screen and locate the new prospect manager. Click **Select** to return to the Edit prospect details screen.

Replace Prospect Manager

From the Prospect page, you can replace the existing prospect manager. These changes are recorded on the Prospect Manager History tab of the prospect record.

Replace a prospect manager

1. From the Prospect page, in **Tasks**, select **Replace prospect manager**. The Replace prospect manager screen appears.
2. The **Current manager** displays at the top of the screen. If start and end dates are entered for this manager, they default into the **Start date** and **End date** fields in the top half of the screen.
3. You can enter a new **Start date** and/or **End date** for the existing manager. If you want to replace the existing manager:
    a. Enter an **End date** in the **Current manager information section**.
    b. In the **New manager information** section, enter the name of the new primary manager in the **New manager** field. Click the binoculars at the end of the field to access a search screen a locate a new manager.
    c. Today’s date defaults in the **Start date** field, designating it the beginning of the new manager’s term. You can edit this date. If known, you can enter an **End date**, designating it the end of the new manager’s term.
4. Click **Save** to save your changes and return to the Prospect page. These changes are recorded on the Prospect Manager History tab of the prospect record.

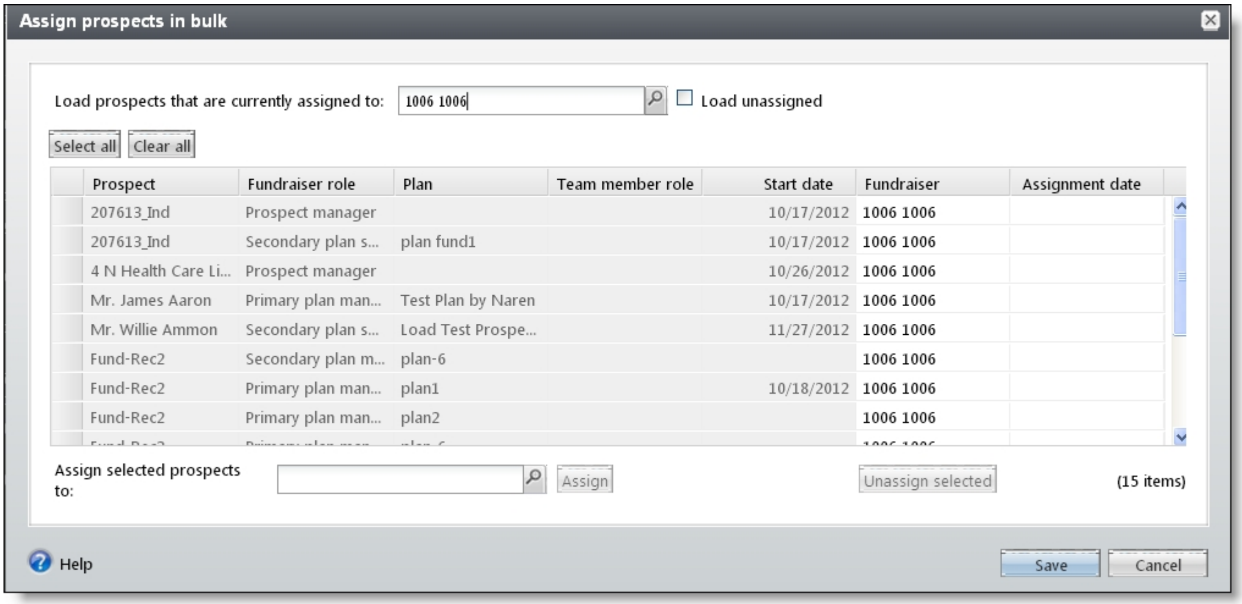
Import Prospect Manager

You can import prospect manager updates using the Constituent update batch type. Before importing the prospect manager updates, make sure the prospect manager exists in your database. Also, when setting up your import process, on the Options tab, select **Quick find** under **Search list fields**.

Note: A prospect manager is any constituent assigned the Fundraiser constituency code. In addition, the fundraiser name must be unique in order for the import to work.

Assign Prospects to Fundraiser in Bulk

The **Assign prospects in bulk** function allows you to assign or reassign a large number of prospects to fundraisers in your database. You can also remove a fundraiser from prospect or plan assignments from this form. To access this function, from the Prospects page click **Assign prospects in bulk**. The Assign prospects in bulk screen appears.



Assign Prospects in Bulk Screen Fields

When reassigning team fundraisers:

- Replaced fundraisers are automatically assigned an **Assignment date** based on the date of the new assignment
- You cannot change the fundraiser role

Screen Item	Description
Load prospects that are currently assigned to	Enter a fundraiser name or click the binoculars to access the Fundraiser Search screen and locate a fundraiser in your database. Once the fundraiser name is in place, all prospects assigned to the selected fundraiser, regardless of the role, display in the grid. If you leave this field blank, prospect assignments that have no manager display in the grid.
Load unassigned	Use this to load unassigned prospects only. Prospects with an assigned fundraiser will not be displayed.
Select all	Selects all prospects listed in the grid.
Clear all	Clears (un-selects) anything selected.
Assign to	To reassign the prospect to a new fundraiser, click the binoculars in this column. The Fundraiser Search screen appears, and you can locate the new fundraiser. The plans and roles remain unchanged even after the new fundraiser is assigned. To reassign a group of prospects, use the **Assign selected prospects to** field

Screen Item	Description
Assignment date	The date you assign the new fundraiser defaults into this field. You can edit this date. Click the drop-down arrow in the field to access a calendar.
Assign selected prospects to	Use this field to reassign a group of prospects to the same fundraiser. In the grid, select the group of prospects you want to reassign (or click **Select all**), then in the **Assign selected prospects to** field enter a fundraiser name or click the binoculars to access the Fundraiser Search screen and locate a fundraiser in your database. Click **Assign** to reassign all selected prospects. The roles and plans remain unchanged and all steps transfer to the new fundraiser.
Unassign selected	Use this button to unassign a fundraiser from prospects or plans. To unassign the fundraiser, highlight the prospects and plans in the grid you want unassigned and click **Unassign selected**. The **Assignment date** column in the grid tracks the removal or unassignment date of the current fundraiser.

Qualification

You've determined the prospect has at least some capacity for a major gift and may have an inclination to donate towards your cause. However, before you invest time and money researching and developing a more comprehensive relationship with the prospect, you may want to qualify these prospects and ensure there is interest in your fundraising opportunities.

After prospects qualify, before cultivation can happen, you need to ensure fundraisers (prospect managers) are assigned and that they can access their Fundraiser page to monitor and track activity for their assigned major giving plans. You may want to ensure your fundraisers know how to access and use their fundraiser tasks before they complete plan steps and file contact reports.

Search Major Giving Prospects

Screen Item	Description
Last/Org/Group name and **First name**	Enter the name of the prospect to find. You can enter an entire name or only the beginning letters. For example, if you enter “Sm”, all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith.
Lookup ID	Enter the primary identifier used at your organization. You can enter the entire ID or only the beginning digits. For example, if you enter “1”, all lookup IDs that begin with the number 1 appear.
Address	Enter the street address or post office box of the prospect to find, such as 7930 Baker Street. To search only by street name, use a wildcard character in place of the street number, such as “*Baker Street” or “%Baker Street”.
City	Enter the city or town of the prospect to find.
State	Select the state of the prospect to find.
ZIP/Postal code	Enter the zip code of the prospect to find.
Match all criteria exactly	To use search criteria exactly as entered, mark this checkbox. If you mark this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered.
Search in	When you click **Show advanced search options**, this field appears. Select the type of constituents to include in the search.
Check nickname	When you click **Show advanced search options**, this checkbox appears. To include nicknames from the Personal tab of individual prospect records in your search, mark this checkbox and enter the nickname in the **First name** field.

Screen Item	Description
Check aliases	When you click **Show advanced search options**, this checkbox appears. To include aliases from the Names tab of prospect records in your search, mark this checkbox and enter the alias in the name fields.
Check merged constituents	When you click **Show advanced search options**, this checkbox appears. To include prospects merged from a duplicate prospect check, mark this checkbox.
Check alternate lookup IDs	When you click **Show advanced search options**, this checkbox appears. To include alternate lookup IDs in your search, mark this checkbox and enter the alternate lookup ID in the **Lookup ID** field.
Only search primary addresses	When you click **Show advanced search options**, this checkbox appears. To include only the primary addresses from the Contact tab of the prospect records in your search, mark this checkbox and enter the primary address information in the address fields.
Include deceased	When you click **Show advanced search options**, this checkbox appears. To include prospects marked as deceased in the search, mark this checkbox.
Include inactive	When you click **Show advanced search options**, this checkbox appears. To include prospects marked as inactive in the search, mark this checkbox.
Include fuzzy search on name	When you click **Show advanced search options**, this checkbox appears. To return prospects with names that sound like the search criteria entered, mark this checkbox. For example, if you mark this checkbox and enter a Last name of "Smith", the program includes prospects named "Smyth" in the results.
Results	When you click **Search**, this grid displays the prospects that match the search criteria entered. For searches that return more than 100 prospects, only the first 100 appear.
Select	To open the record of a prospect in the search results, select the prospect in the **Results** grid and click this button on the action bar.

Fundraiser Tasks

The Fundraiser page consists of a series of tabs and links, containing information related your prospect management activities in your fundraiser role.

To view a visual representation of your fundraisers's activities, you can create KPIs to show information for all or selected planned and pending or completed steps. You can limit the results to a selection of interactions, steps with a specific date range, plan steps of a certain type or at a selected stage in the process, or by the type of interaction that occurred with the step. For information about KPI instances, see the *Reports and KPIs Guide*.

Pending Activity

On the Pending Activity tab of a fundraiser, you track steps not yet complete with a status of Pending. From this tab you can edit the step, mark the step as complete, go to the step, or delete the step. You can also view prospect plans and notes associated with the pending step.

To view details about the step from the Pending Activity tab, select a step in the **Pending steps** grid. Information about the step appears in the **Details** section.

To view only steps on which the fundraiser appears as the owner, select **Only show steps owned by this fundraiser**. If you clear this checkbox, the summary also includes steps on which the fundraiser appears as an additional solicitor.

There is also an **Include general interactions** checkbox. When the checkbox is marked, the Pending Activity tab shows pending steps as well as other pending interactions owned by the fundraiser.

Note: An exclamation point in a yellow triangle appears next to overdue steps.

View Pending Step

From the Pending Activity tab in a fundraiser, you can view steps with a status of "pending" for a selected fundraiser. There is also an **Include general interactions** checkbox on this tab. When the checkbox is marked, the Pending Activity tab shows pending steps as well as other pending interactions owned by the fundraiser.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

View pending steps from a fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the step you want to view.
3. Click the drop-down arrow next to **Steps** and select Go to step. The selected step appears.

Mark Pending Step Complete

From the Pending Activity tab in a fundraiser, you can mark a selected fundraiser's "pending" step as "complete".

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Mark pending step complete from the fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. In the grid, select an step you want to mark as **Complete**.
3. Click the drop-down arrow next to **Steps** and select **Mark complete**. The Mark step complete screen appears.
4. In the **Date** field, today's date defaults. If the completion date is different from today's date, enter the date on which the step was completed.
5. In the **Status** field, select a new status for the completed step.

6. Click **Save** to save the information and return to the Pending Activity tab. The step you changed to **Complete** no longer displays on the tab.

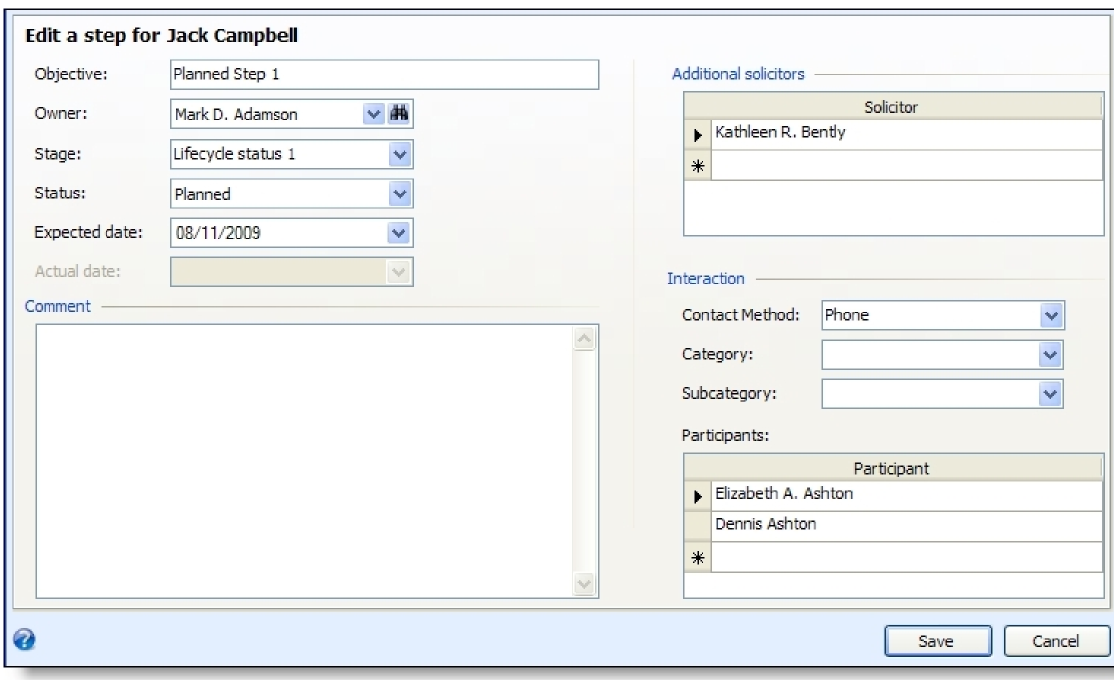
Edit a Pending Step

From the Pending Activity tab, you can edit a selected fundraiser's pending step, changing the status, owner information, etc.

> ***Note:*** Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Edit a fundraiser's pending prospect step

1. From the fundraiser, select the Pending Activity tab.
2. From the grid, select the pending step you want to edit.
3. Click the drop-down arrow next to **Steps** and select Edit step. The Edit step screen appears.



4. Make any necessary changes to the fields on this screen.
5. Click **Save** to save the information and return to the fundraiser.

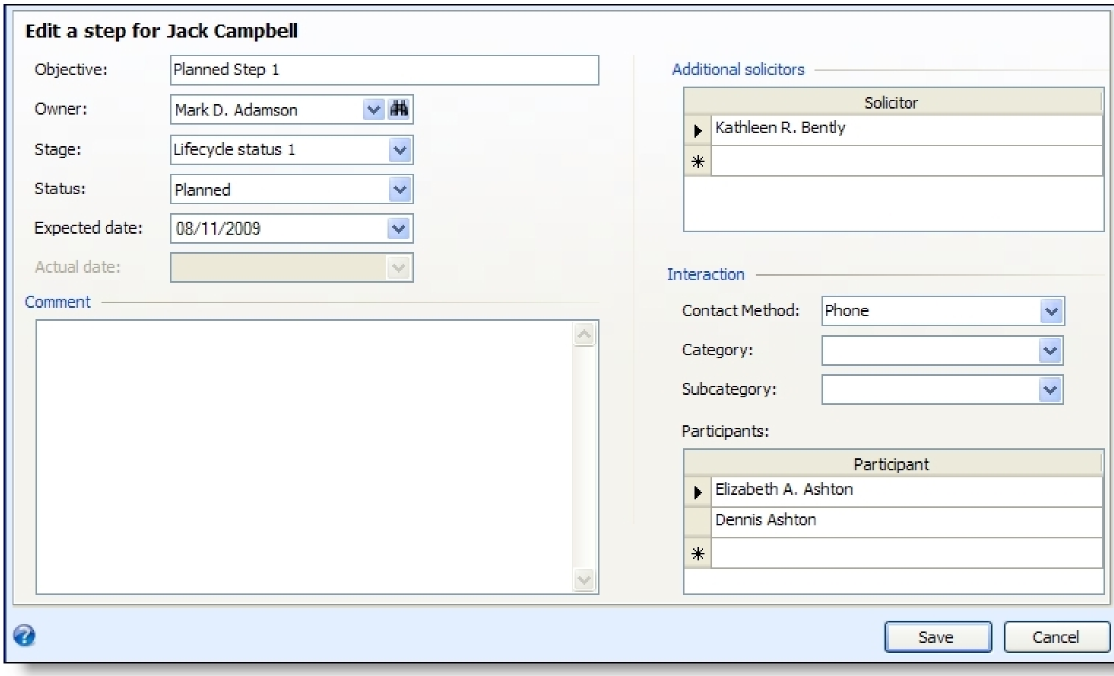
Edit a Pending Step

From the Pending Activity tab, you can edit a selected fundraiser's pending step, changing the status, owner information, etc.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Edit a fundraiser's pending prospect step

1. From the fundraiser, select the Pending Activity tab.
2. From the grid, select the pending step you want to edit.
3. Click the drop-down arrow next to **Steps** and select Edit step. The Edit step screen appears.



4. Make any necessary changes to the fields on this screen.
5. Click **Save** to save the information and return to the fundraiser.

Contact Reports

As a fundraiser, when you complete a step or an interaction with a major giving prospect, you can file a contact report to keep track of your interactions. You can also file contact reports for unplanned activity with a prospect.

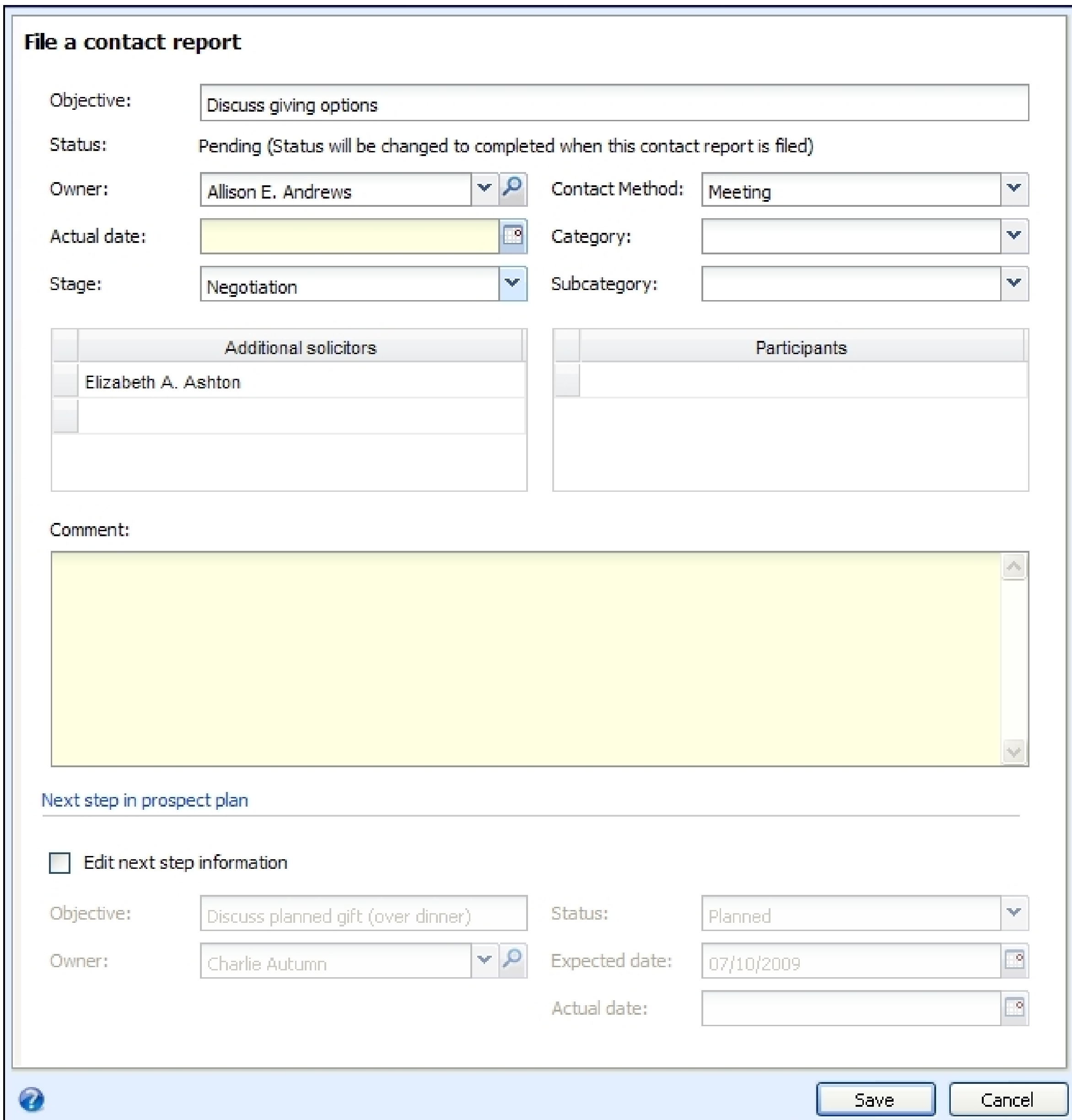
When you file a contact report associated with a step, you can update the step's details and enter any reactions or expected outcomes from the step. Using this information, you can determine if the next scheduled step is adequate or if you should customize the interaction to meet the prospect's needs or interests. When you file a contact report for unplanned activity, a step is automatically created and marked as complete. You can then modify an other existing steps in the prospect plan if needed.

For example, you file a contact report for a phone call you made to determine the prospect's level of interest in contributing a major gift. In the **Comment** field, you note that during your conversation you learned the prospect enjoys reading about local history. As you complete the contact report, you notice the next step in the major giving plan is to schedule a lunch meeting with the prospect. However, since you now know the prospect is interested in history, and your organization's campus is historically significant, you change the interaction to a guided tour of your facilities and grounds.

You can file contact reports from the Fundraiser page or from a prospect plan.

File a contact report for an existing step

1. From the Pending Activity tab of the Fundraiser page or from the Details tab of the prospect plan, select a step and click **File a contact report**. The File a contact report screen appears.

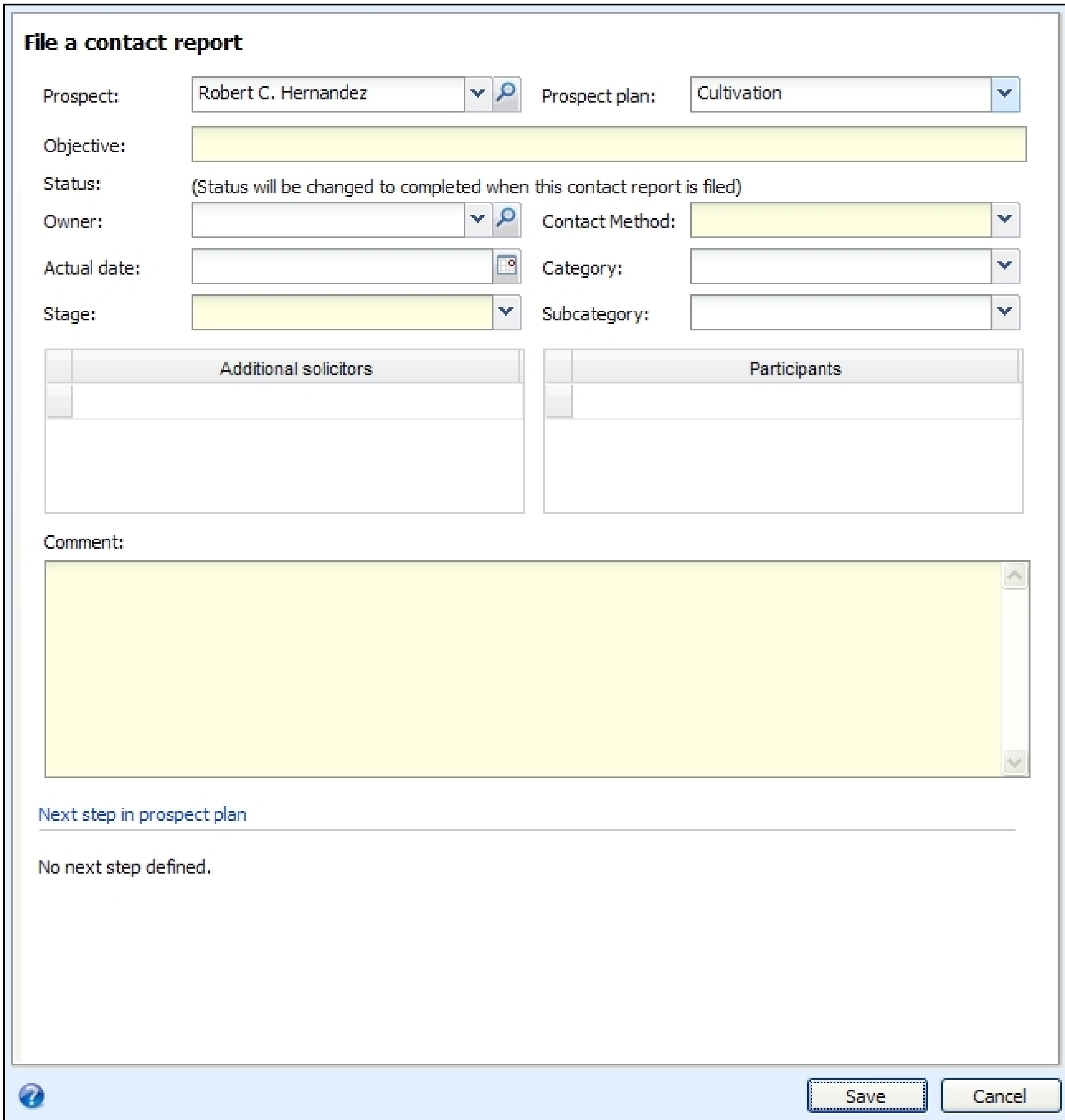


> ***Note:*** A step must have a status of "pending" and an associated contact method in order for you to file the contact report.

2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.
5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.
7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Additional participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. In the **Next plan step for this prospect** fields, you can update the information for the next step based on the information you gathered from this interaction.
12. Select **Edit next step information** to enable the fields in this section.
13. If the plan does not include steps with a pending status, the next planned step appears in the **Next step** fields. You can update the step's information and change the status from planned to pending.
14. Click **Save**. The Contact Report page appears.

File a contact report for an unplanned activity

1. From the Pending Activity tab of the Fundraiser page or from the Details tab of the prospect plan, select a step and click **File an unplanned contact report**. The File a contact report screen appears.



Note: If you file the report from the Fundraiser page, you must first select the prospect and the plan for the contact report.

2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.

5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.
7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Additional participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. If a next step in the prospect plan exists, you can view it and select **Edit next step information** to update it based on the information you gathered from this interaction.
12. Click **Save**. The Contact Report page appears.

Contact Reports

As a fundraiser, when you complete a step or an interaction with a major giving prospect, you can file a contact report to keep track of your interactions. You can also file contact reports for unplanned activity with a prospect.

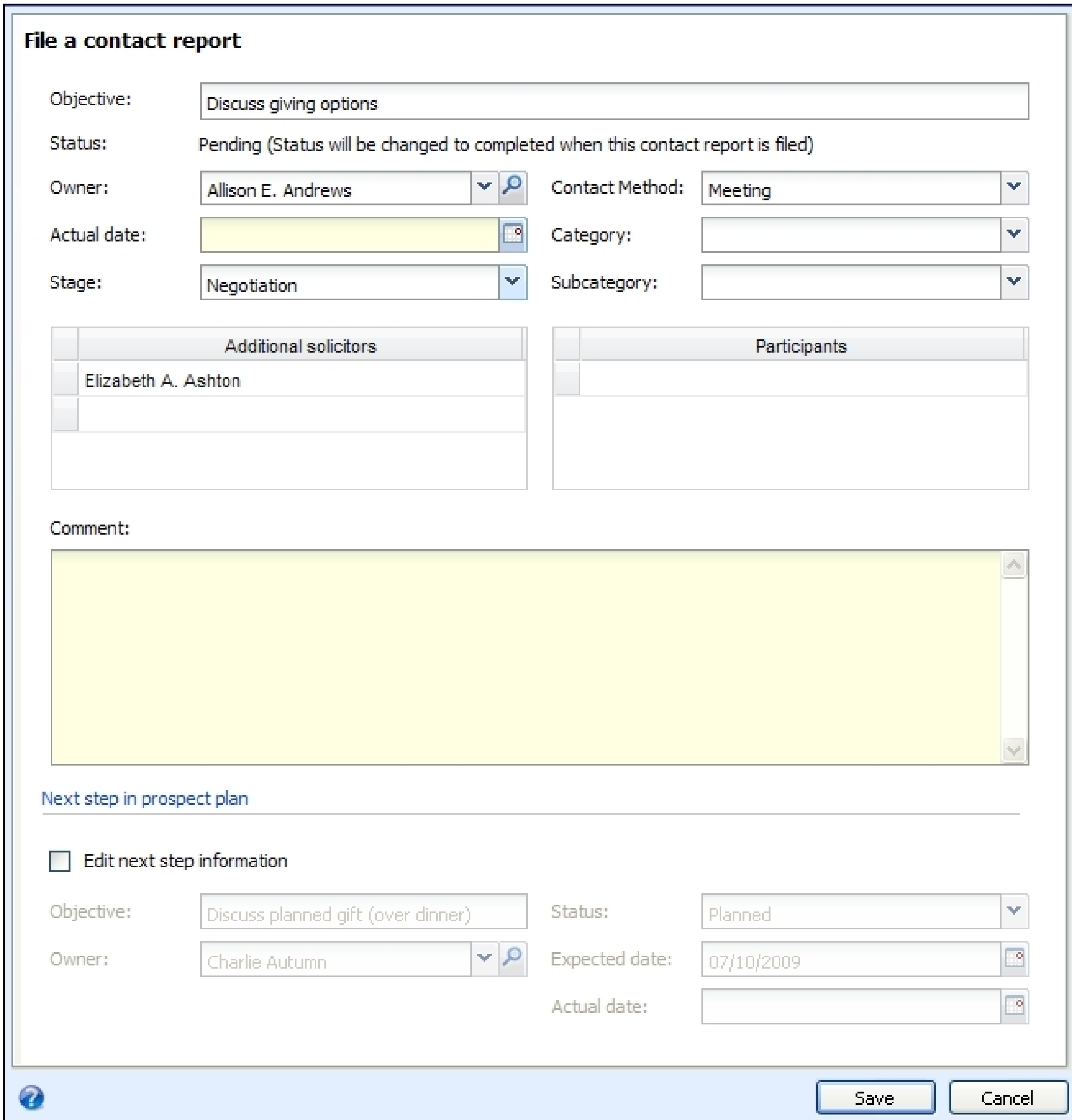
When you file a contact report associated with a step, you can update the step's details and enter any reactions or expected outcomes from the step. Using this information, you can determine if the next scheduled step is adequate or if you should customize the interaction to meet the prospect's needs or interests. When you file a contact report for unplanned activity, a step is automatically created and marked as complete. You can then modify an other existing steps in the prospect plan if needed.

For example, you file a contact report for a phone call you made to determine the prospect's level of interest in contributing a major gift. In the **Comment** field, you note that during your conversation you learned the prospect enjoys reading about local history. As you complete the contact report, you notice the next step in the major giving plan is to schedule a lunch meeting with the prospect. However, since you now know the prospect is interested in history, and your organization's campus is historically significant, you change the interaction to a guided tour of your facilities and grounds.

You can file contact reports from the Fundraiser page or from a prospect plan.

File a contact report for an existing step

1. From the Pending Activity tab of the Fundraiser page or from the Details tab of the prospect plan, select a step and click **File a contact report**. The File a contact report screen appears.



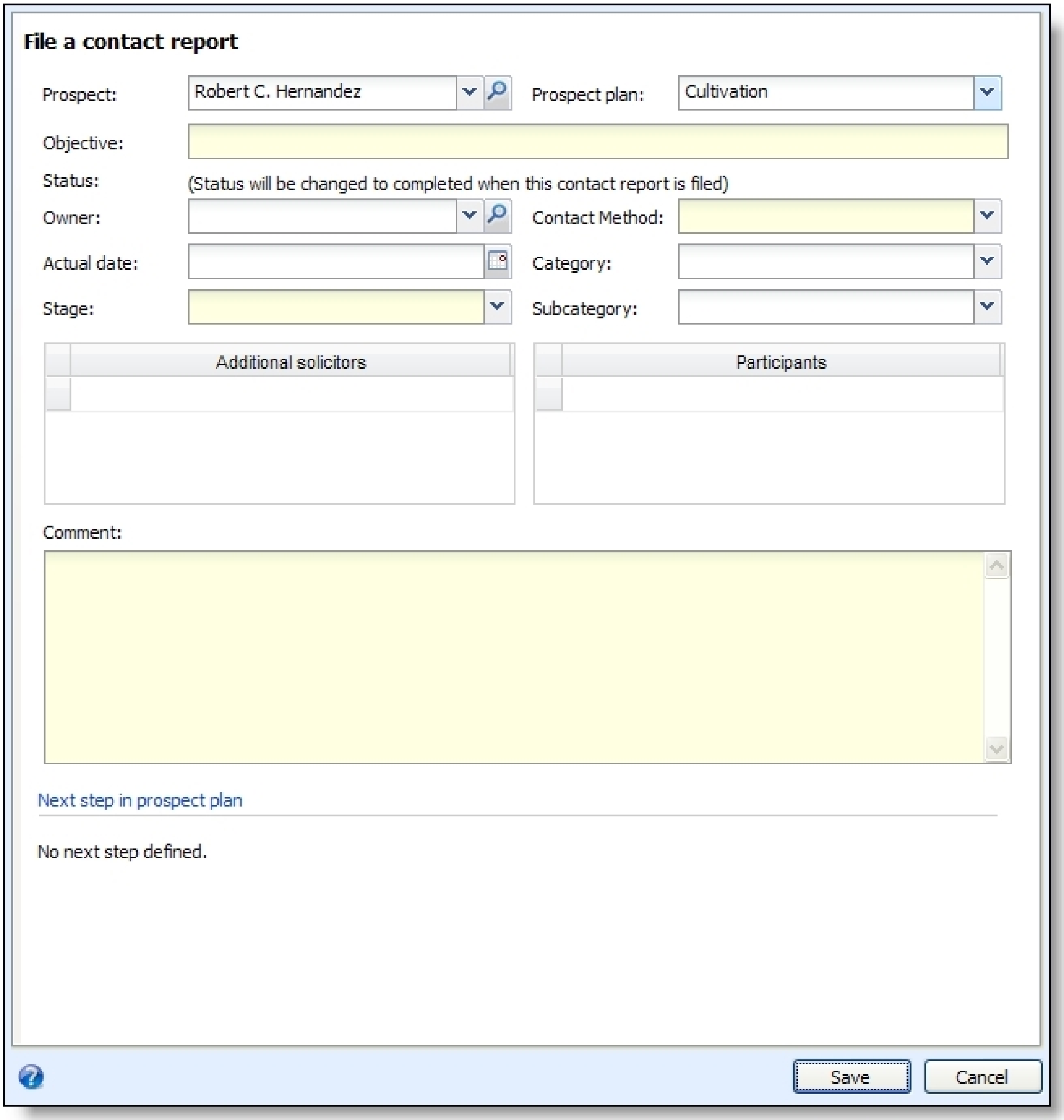
Note: A step must have a status of "pending" and an associated contact method in order for you to file the contact report.

2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.
5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.

7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Additional participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. In the **Next plan step for this prospect** fields, you can update the information for the next step based on the information you gathered from this interaction.
12. Select **Edit next step information** to enable the fields in this section.
13. If the plan does not include steps with a pending status, the next planned step appears in the **Next step** fields. You can update the step's information and change the status from planned to pending.
14. Click **Save**. The Contact Report page appears.

File a contact report for an unplanned activity

1. From the Pending Activity tab of the Fundraiser page or from the Details tab of the prospect plan, select a step and click **File an unplanned contact report**. The File a contact report screen appears.



Note: If you file the report from the Fundraiser page, you must first select the prospect and the plan for the contact report.

2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.

5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.
7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Additional participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. If a next step in the prospect plan exists, you can view it and select **Edit next step information** to update it based on the information you gathered from this interaction.
12. Click **Save**. The Contact Report page appears.

File a Contact Report Screen Fields

Screen Item	Description
Prospect and **Prospect plan**	If you file the report from the Fundraiser page, you must first select the prospect and the plan for the contact report.
Objective	Enter the purpose for this step if different from the original objective.
Owner	Enter the step owner if different from the original owner.
Actual date	Enter the date the fundraiser completed this step.
Stage	Enter the stage at which the step occurred, such as identification or negotiation.
Contact method	Enter the method used to contact the prospect, such as a phone call or a meeting.
Category	Select a category to further define the contact method.
Subcategory	Select a subcategory to further define the contact method.
Additional solicitors	Enter each solicitor who participated in the interaction.
Participants	Enter each participant included in the interaction.
Comment	Enter details about the interaction.
Next plan step for this prospect	If there is a next step in the plan, you can update the step's objective, change the owner of the step, indicate whether the step is planned, pending, or completed, and enter the expected completion date. By default, this section displays the next pending step in the plan. However, if the plan does not include steps with a pending status, information for the next planned step appears.

Delete Pending Step

From the Pending Activity tab in a fundraiser, you can easily delete pending steps from the fundraiser.

Delete pending steps from a fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the step you want to delete.
3. Click the drop-down arrow next to **Steps** and select Delete step. A confirmation screen appears.
4. Click **Yes** to delete the step.

View Prospect Plans Associated with Pending Steps

On the Pending Activity tab of a fundraiser, you can view prospect plans associated with the steps and even enter edits.

View a prospect plan with Pending Steps from a fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the plan you want to view.
3. Click the drop-down arrow next to **Prospect plan** and select Go to plan. The selected plan screen appears.
4. Make any necessary changes.
5. Click **Back** to save the plan and return to the Pending Activity.

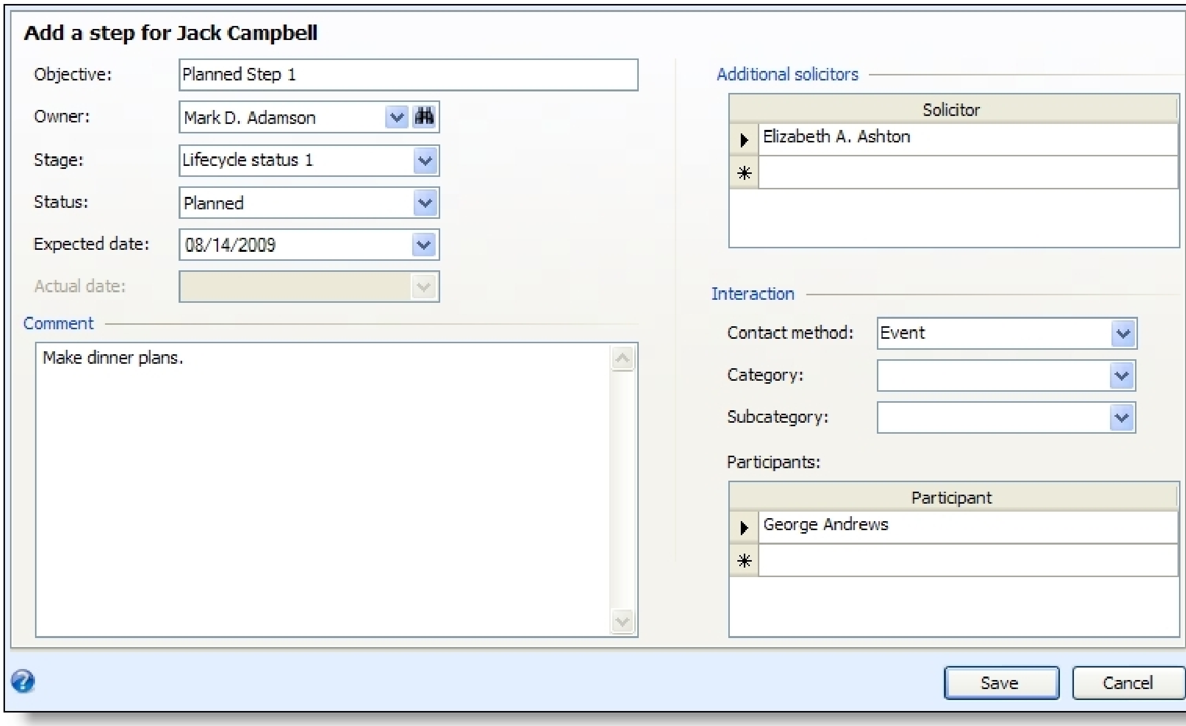
Add Step to Plan Associated with Pending Steps

From the Pending Activity tab in a fundraiser, you can add additional steps to selected plans.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Add a step to a plan associated with pending steps from the fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the plan to which you want to add a step. For example, if you want to add a step to the Major Giving plan, locate a step associated with the Major Giving plan type.
3. Click the drop-down arrow next to **Prospect plan** and select Add step. The Add a step screen appears.



4. Enter the necessary information.
5. Click **Save** to save the step and return to the Pending Activity tab.

Add Step Screen

You define your new step on the Add step screen.

Screen Item	Description
Objective	The purpose for the interaction.
Owner	Click the binoculars to access a search screen and assign a fundraiser to the interaction.
Stage	Select the stage of the interaction: cultivation, solicitation
Status	Select the status of the interaction: completed, not completed.
Expected date	Enter the date you expect the interaction to take place.
Actual date	If you change the status of the step to “completed,” you can enter the date the interaction occurred.
Comment	Enter any additional information you want to include with the step.

Screen Item	Description
Additional solicitors	Enter any additional solicitors to assign to the step. These solicitors also receive credit for the interaction.
Interaction	Enter the contact method to use for this interaction. You can also select a category or subcategory for the interaction.
Participants	Enter all prospects that will participate in this step. This is especially helpful if you are working with a constituent group prospect.

Add Step Screen

You define your new step on the Add step screen.

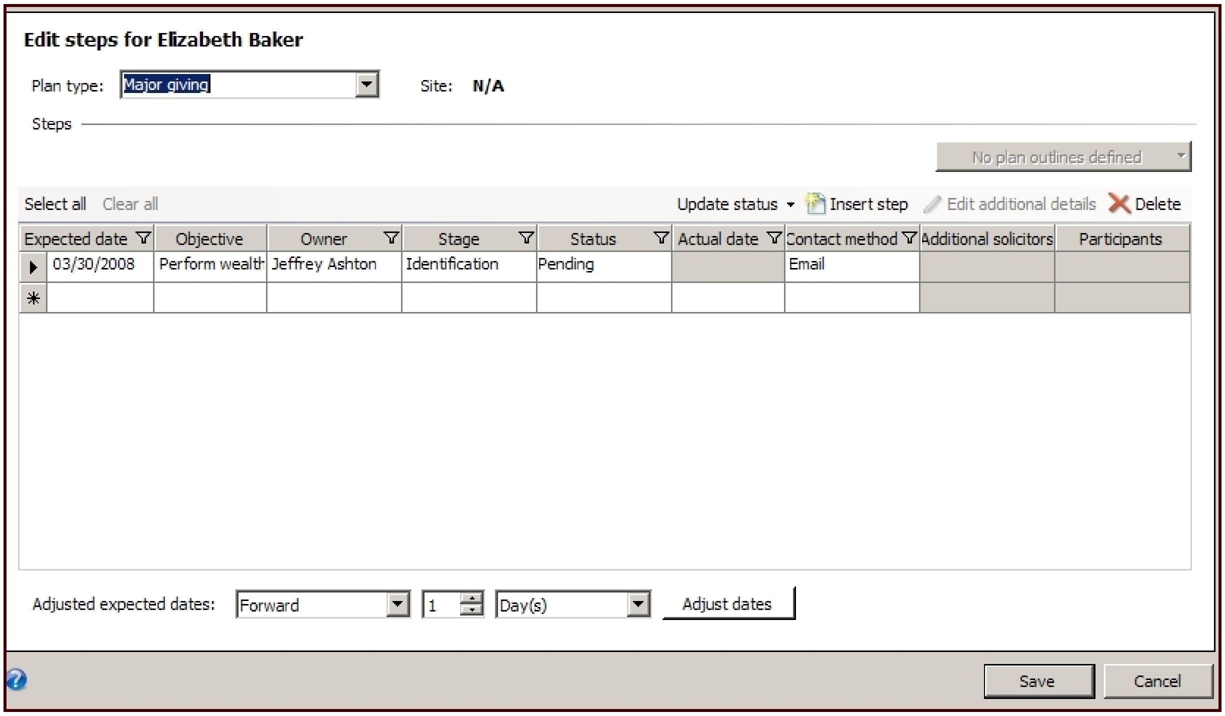
Screen Item	Description
Objective	The purpose for the interaction.
Owner	Click the binoculars to access a search screen and assign a fundraiser to the interaction.
Stage	Select the stage of the interaction: cultivation, solicitation
Status	Select the status of the interaction: completed, not completed.
Expected date	Enter the date you expect the interaction to take place.
Actual date	If you change the status of the step to “completed,” you can enter the date the interaction occurred.
Comment	Enter any additional information you want to include with the step.
Additional solicitors	Enter any additional solicitors to assign to the step. These solicitors also receive credit for the interaction.
Interaction	Enter the contact method to use for this interaction. You can also select a category or subcategory for the interaction.
Participants	Enter all prospects that will participate in this step. This is especially helpful if you are working with a constituent group prospect.

Edit Plan Associated with Pending Steps

On the Pending Activity tab of a fundraiser, you can edit plans associated with the steps. Any changes you make to the plan affect only the selected prospect, not any plan outline that may be associated with the plan.

Edit a plan associated with a Pending Step from a fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the plan you want to edit. For example, if you want to make changes to the plan, locate a step associated with the plan type of Major Giving.
3. Click the drop-down arrow next to **Prospect plan** and select Edit plan. The Edit steps screen appears.



4. Make any necessary changes.
5. Click **Save** to save the changes and return to the Pending Activity tab.

Edit Steps Screen Fields

You can make any necessary changes to selected steps from the Edit steps screen.

Screen Item	Description
Plan type	Select the type of plan: planned giving, major gift.

Screen Item	Description
Add steps from plan outline	If on the Plan outline tab in **Major Giving Setup** you created an outline of the plan you want to implement for certain **Plan type**(s), click the **Add steps from plan outline** drop-down arrow and select the outline you want used for this prospect. The selected outline defaults in the grid. If no outlines exist in the program, the button is grayed out and reads **No plan outlines defined**..
Expected date	The date on which you intend to execute the associated step.
Objective	What you hope to accomplish during the planned step.
Owner	The individual responsible for executing the planned step. Click the binoculars to access the Search screen and locate the individual.
Stage	Where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
Status	Status of associated step: planned, pending, complete.
Actual date	If in the **Status** column you selected "Completed", enter the completion date. A date must be assigned to all "Completed" steps.
Contact method	How you intend to contact the prospect: email, phone call, meeting.
Additional solicitors	"Yes" = additional solicitors are assigned; blank = no additional solicitors assigned.
Participants	"Yes" = participants are assigned; blank = no participants assigned.
Update status	Select an updated status to apply to any selected row in the **Steps** grid.
Insert step	In the **Steps** grid, select the row beneath where you want to add an additional step and click **Insert step**. A blank row appears above the selected row.
Edit additional details	In the **Steps** grid, select the step you want to edit and click **Edit additional details**. The Edit a step screen appears, and you can make any necessary changes.
Adjust expected dates	To adjust **Expected date** entries, select the step or steps you want to change and click the plus and minus buttons to adjust the dates.

Edit Steps Screen

You can make any necessary changes to selected steps from the Edit steps screen.

Screen Item	Description
Plan type	Select the type of plan: planned giving, major gift.

Screen Item	Description
Add steps from plan outline	If on the Plan outline tab in **Major Giving Setup** you created an outline of the plan you want to implement for certain **Plan type**(s), click the **Add steps from plan outline** drop-down arrow and select the outline you want used for this prospect. The selected outline defaults in the grid. If no outlines exist in the program, the button is grayed out and reads **No plan outlines defined**..
Expected date	The date on which you intend to execute the associated step.
Objective	What you hope to accomplish during the planned step.
Owner	The individual responsible for executing the planned step. Click the binoculars to access the Search screen and locate the individual.
Stage	Where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
Status	Status of associated step: planned, pending, complete.
Actual date	If in the **Status** column you selected "Completed", enter the completion date. A date must be assigned to all "Completed" steps.
Contact method	How you intend to contact the prospect: email, phone call, meeting.
Additional solicitors	"Yes" = additional solicitors are assigned; blank = no additional solicitors assigned.
Participants	"Yes" = participants are assigned; blank = no participants assigned.
Update status	Select an updated status to apply to any selected row in the **Steps** grid.
Insert step	In the **Steps** grid, select the row beneath where you want to add an additional step and click **Insert step**. A blank row appears above the selected row.
Edit additional details	In the **Steps** grid, select the step you want to edit and click **Edit additional details**. The Edit a step screen appears, and you can make any necessary changes.
Adjust expected dates	To adjust **Expected date** entries, select the step or steps you want to change and click the plus and minus buttons to adjust the dates.

Delete Plan Associated with Pending Steps

On the Pending Activity tab of a fundraiser, you can delete plans associated with a Pending Step. Any changes you make to the plan affects only the selected prospect, not the general plan.

Delete a plan associated with a Pending Step from a fundraiser

1. From the fundraiser, select the Pending Activity tab.
2. Select the plan you want to delete. For example, if you want to remove the Major Giving plan, locate a step associated with the Major Giving plan type.

3. Click the drop-down arrow next to **Prospect plan** and select Delete plan. A confirmation screen appears.
4. Click **Yes** to delete the plan and return to the Pending Activity tab.

Prospects and Plans

On the Prospects and Plans tab of a fundraiser, the top section of the tab - **Prospects and plans** - tracks all prospect plans to which the fundraiser is connected. For example, if the fundraiser is a researcher on one prospect plan, the prospect and the plan information appear in this section; if the fundraiser is a primary manager on the plan, the prospect and the plan information appear in this section. Historical plans are displayed in italics.

Note: Warnings, displayed as an exclamation point in a yellow triangle, appear on overdue plan steps when the previous step was completed 90 or more days ago. This can be an indication of inactivity between the fundraiser and the prospect.

The bottom half of the tab - **Prospect assignments** - tracks all prospects to which this fundraiser is connected in a managerial role. It also displays prospect team members.

Request New Prospect Plan Assignment - Users with Restricted Role

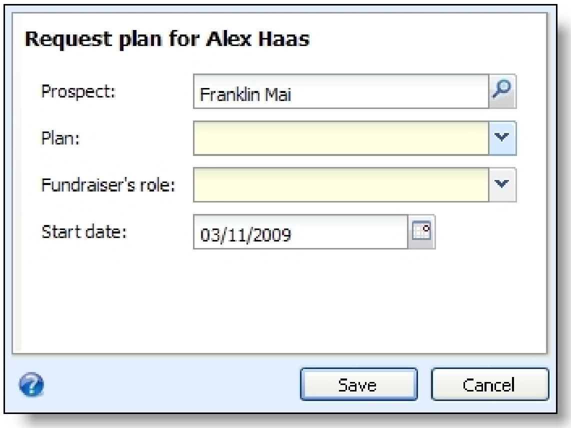
From the **Prospects and plans** section of a fundraiser's Prospects and Plans tab, you can assign the fundraiser to a prospect and prospect plan. A prospect plan outlines your organization's strategies for winning a donation from a prospect.

Note: All users should have access to the **Request plan** link. Users in need of approval before they can make changes to the fundraiser use this request option. The request is then sent to the prospect manager, who must approve the request before it is processed.

Once the primary manager approves the requested assignment, the fundraiser appears on the associated prospect plan.

Add a prospect and plan assignment to a fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** section, click **Request plan**. The Request plan screen appears.



3. In the **Prospect** field, enter the prospect to assign to this fundraiser.
4. In the **Plan** field, select which of the prospect’s plans to assign to the fundraiser.
5. In the **Fundraiser’s role** field, select the role the fundraiser will play in the prospect plan.
6. In the **Start date** field, enter the date the assignment begins.
7. Click **Save**. You return to the Prospects and Plans tab.

   The request automatically appears on the Prospect Requests tab on the prospect manager’s My Fundraiser page.

Request Plan Screen

From the Request plan screen, you can assign the fundraiser to a prospect plan. For information about how to access this screen, see Request New Prospect Plan Assignment - Users with Restricted Role on page 144.

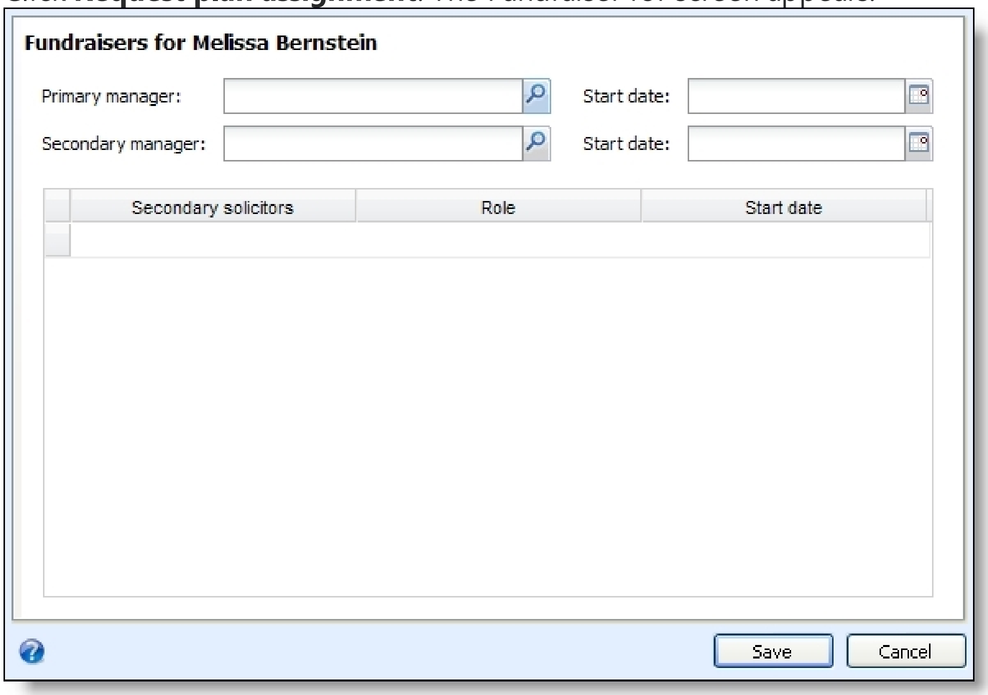
Screen Item	Description
Prospect	Click the binoculars button to access a search screen and locate the prospect you want to assign this fundraiser.
Plan	Select which prospect plan to assign to the fundraiser. Only plans created for the prospect selected appear in the **Plan** field.
Fundraiser’s role	Select the role you want the selected fundraiser to play in this cultivation effort (primary manager, secondary manager, secondary solicitor).
Start date	Enter a start date for the assignment.

Request a Plan Assignment

A fundraiser in the system may open his own or another fundraiser’s record and reassign prospects to a different primary or secondary manager or change secondary solicitors and roles.

Request plan assignment from fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** grid, select the prospect for which you want to request reassignment.
3. Click **Request plan assignment**. The Fundraiser for screen appears.



4. In the **Primary manager** field, enter a primary manager for the prospect and a start date for the assignment.
5. In the **Secondary manager** field, enter a secondary manager for the prospect and a start date for the assignment.
6. Enter any secondary solicitors for the prospect and each solicitor's role and start date.
7. Click **Save**. You return to the Prospects and Plans tab.

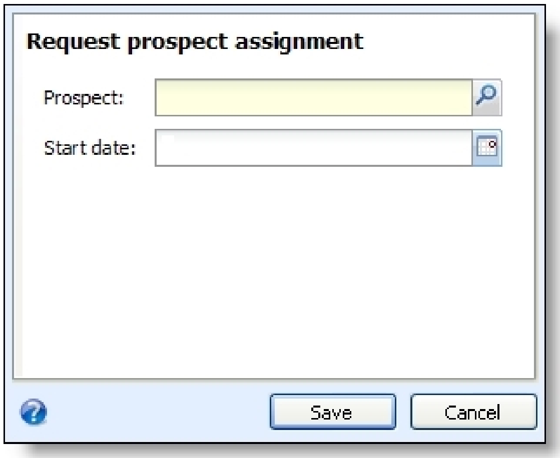
   The request appears on the Prospect Requests tab of the current prospect manager's My Fundraiser page. This manager must approve the request before the new assignment becomes active.

Request a Prospect

A fundraiser in the system may open his own or another fundraiser's record and request a specific prospect assignment.

Request prospect assignment from fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospect assignment** grid, click **Request prospect**. The Request prospect assignment screen appears.



3. Enter the prospect to assign to the fundraiser.
4. Enter a start date for the assignment.
5. Click **Save**. Your return to the Prospects and Plans tab.

   The request automatically appears on the Prospect Requests tab on the prospect manager's My Fundraiser page.

View a Prospect

You can view prospect information from both the **Prospects and plans** or the **Prospect assignments** section on the Prospects and Plans tab in a fundraiser.

View a prospect from the fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In either the **Prospects and plans** or the **Prospect assignments** grid, select the prospect you want to view.
3. Click **Go to prospect**. The selected prospect opens.

View a Prospect Plan

From the **Prospects and plans** section on the Prospects and Plans tab in a fundraiser, you can view selected prospect plans. The plans outline your organization's strategies for winning a donation from the prospect.

Historical plans are displayed in italics. If you click on a historical plan to view it, a red X and the word "Historical" are also displayed at the top of the plan record.

View a prospect plan from the fundraiser

1. From the fundraiser, select the Prospects and Plans tab.
2. In the **Prospects and plans** grid, select the **Plan type** you want to view.
3. Click **Go to plan**. The selected plan opens.

Grants Tab

From the Grants tab, you can view details about specific grant funding requests the fundraiser has been assigned to, as well as a summary view of the information.

For information about how to manage grant funding requests, see the *Corporate and Foundations Fundraising Guide*.

For information about how to manage grant funding requests, see the Foundations section of the help file.

Grant Funding Requests

The **Grant funding requests** section lists all funding requests on which the fundraiser appears as a manager or solicitor. If the fundraiser is assigned to more than one role for the request, each role appears in the **Fundraiser role** column. You can view the fundraiser's grant funding requests for all or selected sites and edit specific request details, such as the status, amount requested, and the managers or solicitors assigned to the request. Click **Go to** to access the funding request, grant program, or grantor associated with an entry.

Grant Funding Request Summary

The Grant funding request summary section provides a quick view of the fundraiser's funding request and grant award totals during a selected time period. The grant award submitted and the amount requested may not be the same, so you can determine if the total amount received is greater or lesser than the total amount of the associated funding request proposals. Select **Include request without a defined date** to include funding requests that do not have a date entered in the **Date submitted** field.

Planned Step Summary

The Planned step summary tab tracks information about the selected fundraiser's upcoming prospect steps in both a statistical format - displayed in the grids on the left side of the screen - and graphically.

In the **Show for** field, select the number of days for which you want to view planned step information. For example, if you want to see how many steps are planned for the next seven days, select “Next 7 days”.

Select **Only show steps owned by this fundraiser** to view information for steps on which the fundraiser appears as the owner. If you clear this checkbox, the summary includes steps on which the fundraiser appears as an additional solicitor.

The first grid and graph display planned step interactions based on the interaction type (meeting, phone call). Any additional grids and graphs display planned steps based on the plan type. For example, if the fundraiser planned steps for both major gift and planned gift plans, a grid and graph appears for each plan. If the fundraiser planned steps for just the major gift plans, only one grid and graph appear for major gift.

To see information about a specific step, click the number link in the **Steps** column. The Prospect Steps page appears. From this page you can go to the selected step, plan, or prospect.

Completed Step Summary

The Completed step summary tab tracks information about the selected fundraiser's completed prospect steps both statistically - using the data displayed in the grids on the left side of the screen - and graphically.

In the **Show for** field, select the number of days for which you want to view completed step information. For example, if you want to see how many steps were completed in the past seven days, select "Last 7 days".

Select **Only show steps owned by this fundraiser** to view information for steps on which the fundraiser appears as the owner. If you clear this checkbox, the summary includes steps on which the fundraiser appears as an additional solicitor.

The first grid and graph display completed steps based on the step type (meeting, phone call). Any additional grids and graphs display completed steps based on the plan type. For example, if the fundraiser completed steps for both major gift and planned gift plans, a grid and graph appears for each plan. If the fundraiser completed steps for just the major gift plan, only one grid and graph appear for major gift.

To see information about a specific step, click the number link in the **Steps** column. The Prospect Steps screen appears. From this screen you can go to the selected step, plan, or prospect.

Prospect Summary

The Prospect summary tab helps you track the number of prospects in a fundraiser's pipeline, both statistically - using the data displayed in the grids on the left side of the screen - and graphically.

The gray bar near the top of the tab displays the total number of prospects assigned the fundraiser. The number of **Plan type** grids and corresponding graphs displayed depends on the number of plans currently assigned to the fundraiser's prospects. For example, if the fundraiser works with only major gift prospects, one grid displaying major gift data appears. The grids lets you know the plan stage of each prospect, along with the total number of prospects assigned the plan.

To see a list of prospects included in a **Plan stage**, click the number link in the **Prospects** column. The Prospects page appears. From this page, you can go to a selected prospect's plan or prospect.

Opportunities

From the Opportunities and Asks tab, you can track the number of fundraising opportunities presented to the fundraiser and the number of actual requests for money made by the fundraiser.

- You can filter the data displayed on the tab based on **Plan type**.
- The top of the tab displays the dollar amount and number of **Qualified opportunities** and **Overdue asks**.
- In the **Overdue** section, you can view the number of **Overdue asks** and **Overdue responses** for the selected fundraiser.

  Note: An opportunity is considered overdue if the status is "Qualified" and the actual ask date is in the past. These overdue opportunities are ones the fundraiser should be actively working on in order to update the status to "Accepted" or "Rejected" based on the prospect.
- In the **Completed** section, you can view the dollar amount and number of **Accepted**, **Canceled**, **Rejected**, and **Total asks**. Using the **Show for** field, you can select the time period for which you want to view data.
- In the **Qualified & response pending** section, you can filter the data displayed using the **Show for** field.

Opportunity Pyramid

This tab tracks opportunities using a pyramid. You can base the display on qualified, accepted, response pending, or all opportunities.

Campaigns Tab

If campaigns are assigned to the fundraiser, these campaigns display on the Campaigns tab. From this tab you can assign campaigns; edit the campaigns already assigned; delete a campaign; and add, update, and view KPIs. You can select **Show prior campaigns** to include past campaigns to which the fundraiser was assigned.

Add Campaign

If a fundraiser is responsible for raising funds for specific campaigns, you can track these campaigns from the fundraiser record.

Add campaign to fundraiser record

1. From the Campaigns tab of the selected fundraiser’s record, click **Add**. The Add campaign fundraiser screen appears.
2. On this screen enter details about the fundraiser campaign. For more information about the items on this screen, see Add Campaign Fundraiser Screen on page 151.

3. Click **Save**. You return to the fundraiser record.

Add Campaign Fundraiser Screen

Screen Item	Description
Campaign	Click the binoculars. A search screen appears, and you can locate the campaign to assign.
Position	Enter the fundraiser's position in relationship to this campaign.
Task	Enter any specific tasks this fundraiser is responsible for in relationship to this campaign.
Start date/End date	If the fundraiser's responsibility to the campaign has a specific start and end date, enter that information here.

Add KPI

Key Performance Indicators track your organization's strategic performance. Financial and non-financial matrices are used to assess your business condition and to help you determine a course of action.

From the Campaigns tab of the fundraiser record, click **Add KPI**. A New KPI Instance screen appears displaying the Parameters tab. For information about creating a KPI instance, see the*Reports and KPIs Guide*.

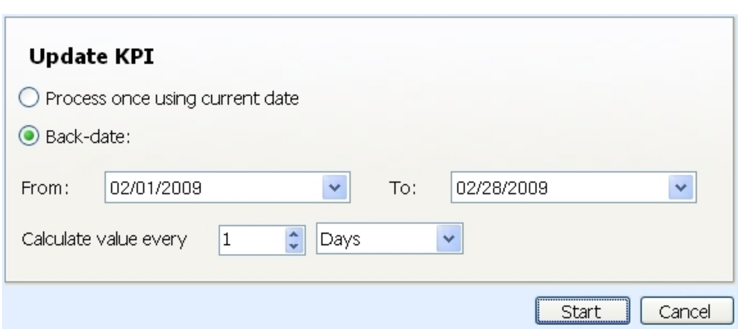
You can create KPIs to help you track your fundraisers' performances based on the campaigns associated with a fundraiser.

Update KPI Value

After you create an instance, you can generate the KPI values associated with the instance settings whenever necessary.

Update KPI value from Fundraiser record

1. From the Campaigns tab of the fundraiser record, click **Update KPI value**. The Update KPI screen appears.



2. To view data based on the current date, select **Process once using current date**. This creates one history record relative to the current date.

   To enter specific date information, complete the following steps:
   a. Select **Back-date**. This creates several history records relative to the date determined by the interval provided, such as “every 3 months” or “every 7 days.” For example, back dating a KPI between 1/1/2007 and 1/12008 with an interval of every 3 months creates four history records, one for each quarter.

      > ***Note:*** Back dating is typically used for new KPI instances when trend information does not exist. After you create a KPI instance, you will most likely update it by scheduling a business process. Each time the process runs, a new KPI instance history record is created as of the date the process ran.

   b. In the **From** field, enter the start date from which you want to view data.
   c. In the **To** field, enter the end date to which you want to view data.
   d. In the **Calculate value every** field, select how you want the data broken down. For example, if in the **From** and **To** fields, you select for view data for a year, in the **Calculate value every** field, you can opt to view value information for every 3 months.

   > ***Warning:*** Back dating a KPI erases any values falling within the specified date range previously stored for the selected KPI instance.

3. Click **Start**. The KPI values are updated and the selected KPI instance record appears.

Go to KPI Instance

To view existing values of your KPI, from the Campaigns tab on the fundraiser record select the campaign for which you want to view information and click **Go to KPI instance**. The instance displays goal status, recent status, and history information. You can also schedule jobs from here.

For information about working with KPIs, see the Key Performance Indicator chapter of the *Reports and KPIs Guide*.

Prospect Research Requests Tab

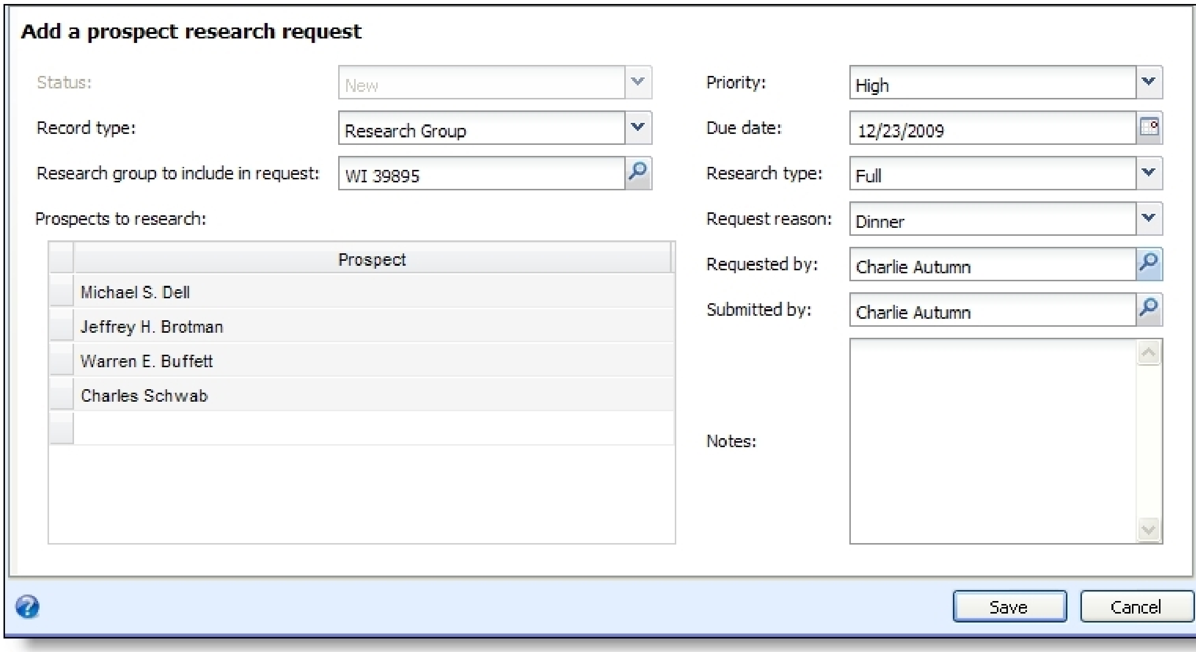
If the fundraiser submits or requests research for a prospect or group of prospects, the Research Requests tab appears on the fundraiser’s record. From this tab, the fundraiser can add additional requests, edit existing requests if necessary, cancel requests, and track the request’s progress.

The **Research requests** grid at the top of the tab summarizes each request, displaying date, status, record type, number of constituents, type of research requested, and researcher information. The detail view near the bottom half of the tab displays all information included on the request form, such as priority and submitted by.

Add a new prospect research request from the Prospect Research page

1. From the Prospect Research page, select the Research requests tab and click **Add** or from the Prospects page, under **Prospect research**, click **Add a prospect research request**.

2. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.



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

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

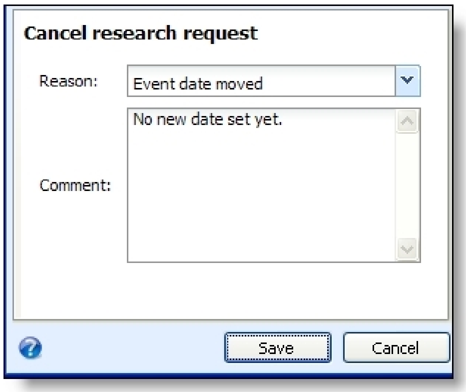
5. Enter any additional information required for the request, such as a priority, due date, and reason.

Edit an existing prospect research request

1. From the Prospect page, click **Edit a Prospect Research Request** or from the Research Requests tab of the Fundraiser record, in the **Research requests** grid, select the request you want to edit and select **Edit**. The Edit a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** selected.
2. The **Record type** cannot be changed, but enter necessary changes to any of the other fields included on this screen. The items included on this screen are the same as those included on the Add a prospect request screen.
3. Click **Save** to save the changes.

Cancel a prospect research request

1. From the Research Requests tab of the Fundraiser record, in the **Research requests** grid, select the request you want to cancel.
2. Select **Cancel**. The Cancel research request screen appears.



3. In the **Reason** field, select why you want to cancel this request. Reasons are created in **Code Tables** in *Administration*.
4. In the **Notes** field, enter any additional information you want to include with the cancellation.
5. Click **Yes**. You return to the Research Request tab. The **Status** of the request now displays "Canceled."

View prospect research request record

1. From the Research Requests tab of the Fundraiser record, in the **Research requests** grid, select the request you want to view.
2. Select **Go to request**. The Research Request page for the selected request appears.
3. Click **Back**. You return to the fundraiser record.

Prospect Requests Tab

This tab appears on the fundraiser page. It stores prospect requests made by the fundraiser and the status of prospect requests. Fundraiser changes made through the actions included on this tab are recorded on the Prospect Manager History tab of the prospect's record.

When a request is accepted, the current system date is recorded as the incoming manager's **Start date**.

Requests Pending Approval

This section of the Prospect Requests tab displays requests related to prospects for whom this fundraiser is the prospect manager. For example, if Charlie Autumn requests a prospect currently managed by Margaret Mai, when Margaret opens her fundraiser page she will see the request on her Prospect Requests tab. From here, she can approve or deny the request.

Approved requests change all related records and remove the request from the grid.

Approve Prospect Request

From the **Requests pending approval** section of the Prospect Requests tab on the fundraiser page, fundraisers can approve requests from other prospect managers wanting to claim management of selected prospects. All requests display in the section grid. To approve a request, select the request and click **Approve selected**.

Denied requests are removed from the list.

Deny Prospect Request

From the **Requests pending approval** section of the Prospect Requests tab on the fundraiser page, fundraisers can deny requests from other prospect managers wanting to claim management of selected prospects. All requests display in the section grid. To deny a request, select the request and click **Deny selected**.

Requests Made by Fundraiser

This section of the Prospect Requests tab displays requests put in by this fundraiser. For example, if Charlie Autumn requests a prospect, the prospect displays in this section grid on his fundraiser record.

If the fundraiser currently managing the prospect approves the request, the prospect is assigned the requesting fundraiser and the **Status** column changes from "Pending" to "Approved." If the fundraiser currently managing the prospect denies the request, the prospect is not reassigned and the **Status** column changes to "Denied."

Approved requests change all related records and designate the request as "Approved" in the grid.

To delete a request, select the request you want to delete and click **Delete selected**.

Cultivation

During this period, your prospect researchers and development officers work in tandem to get to know and develop a better relationship with your prospects. Researchers develop a more comprehensive wealth screen and send profile reports to development officers. Development officers follow plan steps and file contact reports. Along the way, you determine if there are any opportunities that match what you learn about the prospect along the way.

During this time, you may want to use Mapping to assist your development officers in identifying groups of prospects, by geography, to meet with on the same trip.

You can also use social media services to track prospect's online accounts as you build a more complete picture of what motivates this constituent and does it match your current funding opportunities.

During this time, directors of development may be tracking the prospect plans and ensuring the right prospect managers are assigned to the right prospects and that the proper steps are being taken for optimized relationship development.

Prospect Research Wealth Record

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

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

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

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

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

Wealth Summary

Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.

Learn more about how to View Wealth Summary Information

Model Scores

Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which constituent will become a major donor.

Learn more about the Model Scores and Ratings tab

Assets

Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.

Learn more about the Prospect Asset Information tab

Giving

Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.

Learn more about the Prospect Giving Information tab

Affiliations

Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.

Learn more about the Wealth Affiliations tab

Biographical Information

Contains biographical data from a wealth screen, such as Experian or Marquis Who's Who demographic information.

Learn more about the Biographical Information tab

Link Tank

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

Prospect Research Report

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

Learn more about the prospect research report!

Flag Prospect

The **Flag prospect** link in the **Tasks** pane of the Wealth and Ratings page marks prospects you want to track for any purpose. For example, if you organization maintains a “Hot List” of prospects, you can use the **Flag prospect** link to flag the prospect and include them in your “Hot List.”

When you flag a prospect, the **Flag prospect** link changes to **Unflag prospect**. Click the **Unflag prospect** link to remove the prospect from your flagged prospect list.

View Wealth Summary Information

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

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

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

Disable/Enable Wealth Updates

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

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

Disable Wealth Updates for a selected prospect

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

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

Manage Giving Capacity

You can enter wealth capacity information on your prospect records, tracking estimated wealth and major giving capacity.

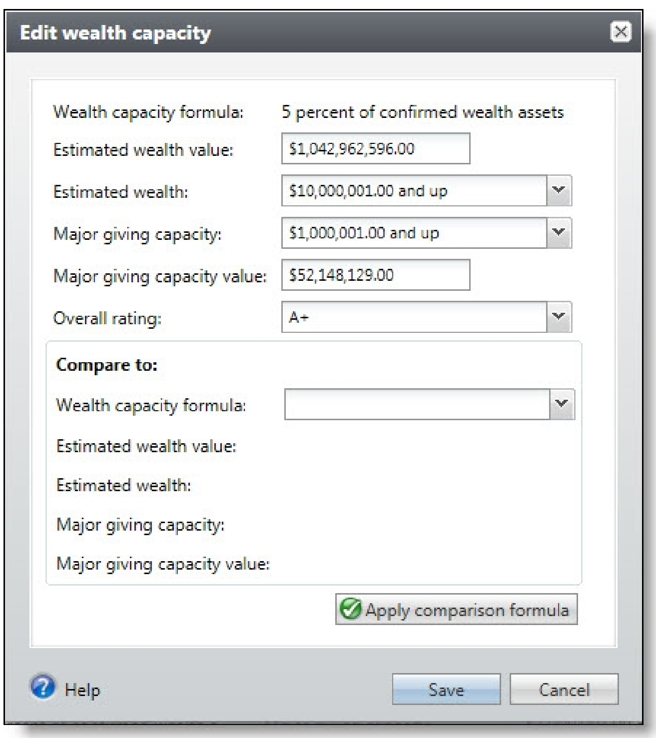
> ***Tip:*** A wealth capacity formula is used to determine a constituent's estimated wealth range. The system provides a default formula for calculating these ranges, but you may also choose to create additional formulas.

You can also enter an overall wealth capacity rating.

The **Giving capacity** grid displays general information about the prospect's giving capacity, including the formula used to determine the capacity and the major giving capacity basis. You create formulas in the **Wealth capacity formula management** function, accessed from the **Configuration** section of the Prospects page.

Enter constituent wealth capacity information

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



3. The **Wealth capacity formula** field displays the formula used to determine the current wealth capacity.
4. You create formulas in the **Wealth capacity formula management** function, accessed from the **Administration** pane on the Prospects page.
5. Enter the constituent’s **Estimated wealth** dollar amount.
6. Select the constituent’s **Estimated wealth** dollar range.
7. Select the constituent’s **Major giving capacity** range.
8. Enter a specific **Major giving capacity value** based on your research for this constituent.
9. Enter an **Overall rating** for the constituent’s wealth capacity. This is an internal rating determined by your organization.
10. In the **(Group) Wealth capacity formula** field of the **Compare to** frame, select another formula to compare against the existing formula.
11. If you prefer the new formula ratings, click **Apply comparison formula** and the new formula is assigned to the constituent to determine wealth capacity.
12. Click **Save** to save the ratings information and return to the constituent’s Wealth and Ratings page.

Confirm and lock constituent wealth capacity information

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

Prospect Status, Manager, Group Association, and Summary Information

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

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

Edit the prospect manager assigned a prospect

1. Open the prospect's Wealth and Ratings page.
2. In the **Research details** grid, click **Edit**. The Edit research details screen appears.
3. In the **Prospect manager** field, enter the new manager you want assigned this prospect.
4. Click **Save** to save the change.

Edit a Prospect's Research Status

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

Edit Prospect Research Summary Information

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

Edit Research Details Screen

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

Group Member Ratings

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

Access Group Member Record

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

Data Refresh Notifications

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

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

Note: For information about enabling data refreshes, see Disable/Enable Wealth Updates on page 158.

WealthPoint Data Refresh Notifications Page

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

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

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

- D&B
- GuideStar - Nonprofit Affiliations
- GuideStar - Foundation Affiliations
- Thomson
- Who’s Who

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

Obtain Prospect Wealth Information

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

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

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

If you subscribe to ***WealthPoint***, Blackbaud’s wealth screening solution, you can import ***WealthPoint*** data. When importing ***WealthPoint*** information, the system does not override any manually entered data you stored on a given prospect. For example, if you entered real estate information from Mark Adamson and real estate information is included in the ***WealthPoint*** import, whatever information you entered about Mr. Adamson remains intact after the import. This is also true of any information you manually edited or deleted.

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

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

Update individual prospect WealthPoint data

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

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

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

WealthPoint Searches

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

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

Model Scores and Ratings

The Model Scores tab on a prospect;s Wealth and Ratings page houses model scores and ratings information. A model score is an integrated analytics tool that identifies prospects most likely to give a gift to your organization. It helps your organization predict actions such as planned and recurring gifts, membership renewals, and what constituents will become major donors.

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

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

For more information on how to create scores, see Create Customized Ratings on page 166

Only non-Blackbaud scores can be edited or deleted.

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

Model Scores and Ratings

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

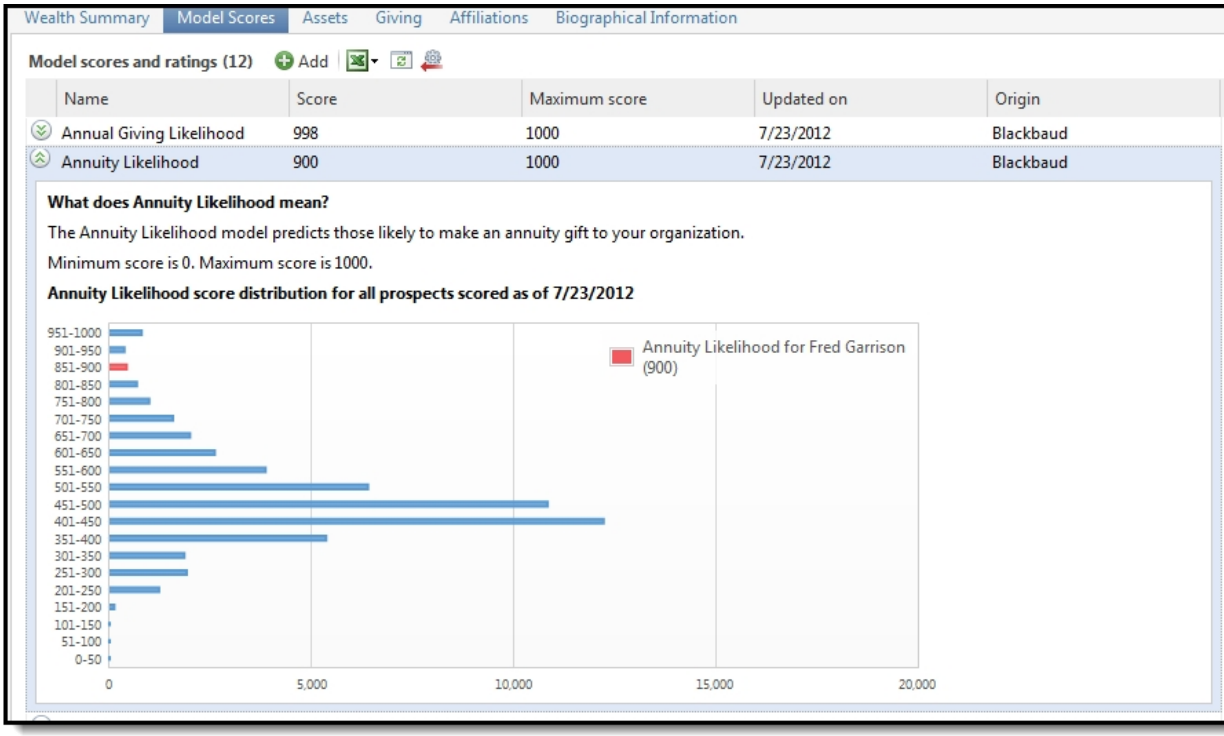
Models are scored on a range from 0-1000. Scores are determined by organization name, organization address and gift transaction file, demographic data, and public wealth data. Organizations can use Blackbaud’s model scores, as well as create their own scores.

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

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

Distribution View

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



Model Score Descriptions

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

The following table defines current Blackbaud model scores:

Description Name	Explanation
Annual Gift Likelihood	Predicts how likely a donor is to make an annual gift of any size.
Major Gift Likelihood	Predicts how likely a donor is to make a major gift.
Target Gift Range	Predicts the amount the donor is capable of giving over a 12-month period.
Mid-Level Gift Likelihood	Predicts how likely a donor is to make a mid-level gift.
Planned Gift Likelihood	Predicts how likely a donor is to make a planned gift.
Annuity Likelihood	Predicts how likely a donor is to make an annuity gift.
CRT Likelihood	Predicts how likely a donor is to make a charitable remainder trust gift.

Description Name	Explanation
Likelihood to Give	Predicts how likely a donor is to donate and respond to your appeals.
Principal Giving Solution	Predicts how likely a donor is to make principal gifts.
Bequest Likelihood	Predicts how likely a donor is to make a bequest gift.
Alumni Engagement Likelihood	Predicts which alumni are likely to become engaged supporters, as defined by your university.
Membership Likelihood	Predicts those likely to make a membership gift.
Membership Target Gift Range	Predicts membership a donor is capable of purchasing in a 12-month period.

Manage Constituent Modeling and Ratings Data

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

Create Customized Ratings

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

Create Model attribute categories

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

record, an error message explains the restriction.

> ***Note:*** For detailed instructions about working in **Attribute Categories**, see the Attribute Categories chapter in the *Administration Guide*.

9. Click **Save** to save the new attribute category and return to the Attribute Categories page.
10. The new category appears as an option on the Add model scores and ratings attribute screen in the **Scores & ratings** feature included on a prospect's Wealth Summary tab.

Add Rating Information to Constituent

If your organization uses a likelihood-to-give ratings model to track constituents and their likeliness to make a gift, you can enter this information on individual constituent records. The ratings are based on attribute categories. You create attribute categories using **Attribute Categories** in *Administration*. Once you create the attribute category in *Administration*, you can assign the category and a ratings value using the **Add** option available on the Model scores and ratings screen.

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

> ***Note:*** For more information about creating modeling and ratings data, see Create Customized Ratings on page 166.

Add model scores and ratings to a prospect

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

   For information about creating attributes, see Create Customized Ratings on page 166 or the Attribute Categories chapter in the *Administration Guide*. Also, when creating your rating attribute categories, make sure to select the Model Scores and Ratings record type on the Attribute category screen in **Manage Attribute Categories**.
4. Enter a **Value** to rate the constituent's likelihood to give. The value allowed is determined by the **Date type** associated with the selected attribute category. For example, if the selected **Category** allows for "number" data types, only numbers can be entered in the **Value** field.
5. Enter a **Start date** for the value. For example, the date the rating information was acquired.
6. If necessary enter an **End date** for the value. For example if the value is reliable for just one year, enter the date it will expire.
7. Enter any **Comment** you want to include with the rating information.

8. Click **Save** to save the ratings information and return to the Model Scores and Ratings screen. The information you added appears in the **Model scores and ratings** grid.

Model Score Updates through Batch Entry

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

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

  For example, you have several revised modeling scores for a group of constituents that you need to import into the system. After you have your data in a CSV file format, you can import the information into the database. The import is based on a batch template created in **Batch Entry**. In the batch template, you select the batch type and workflow you want used when data is imported.

- If you do not have an import file, but you want to enter updated information quickly, without opening every record, you can use the batch process. With a batch, the program lists the selected fields (fields included in the batch template) as fields in a spreadsheet so you can efficiently enter information in the database. Like the import process, the batch requires a batch template, which specifies the fields to add or update.

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

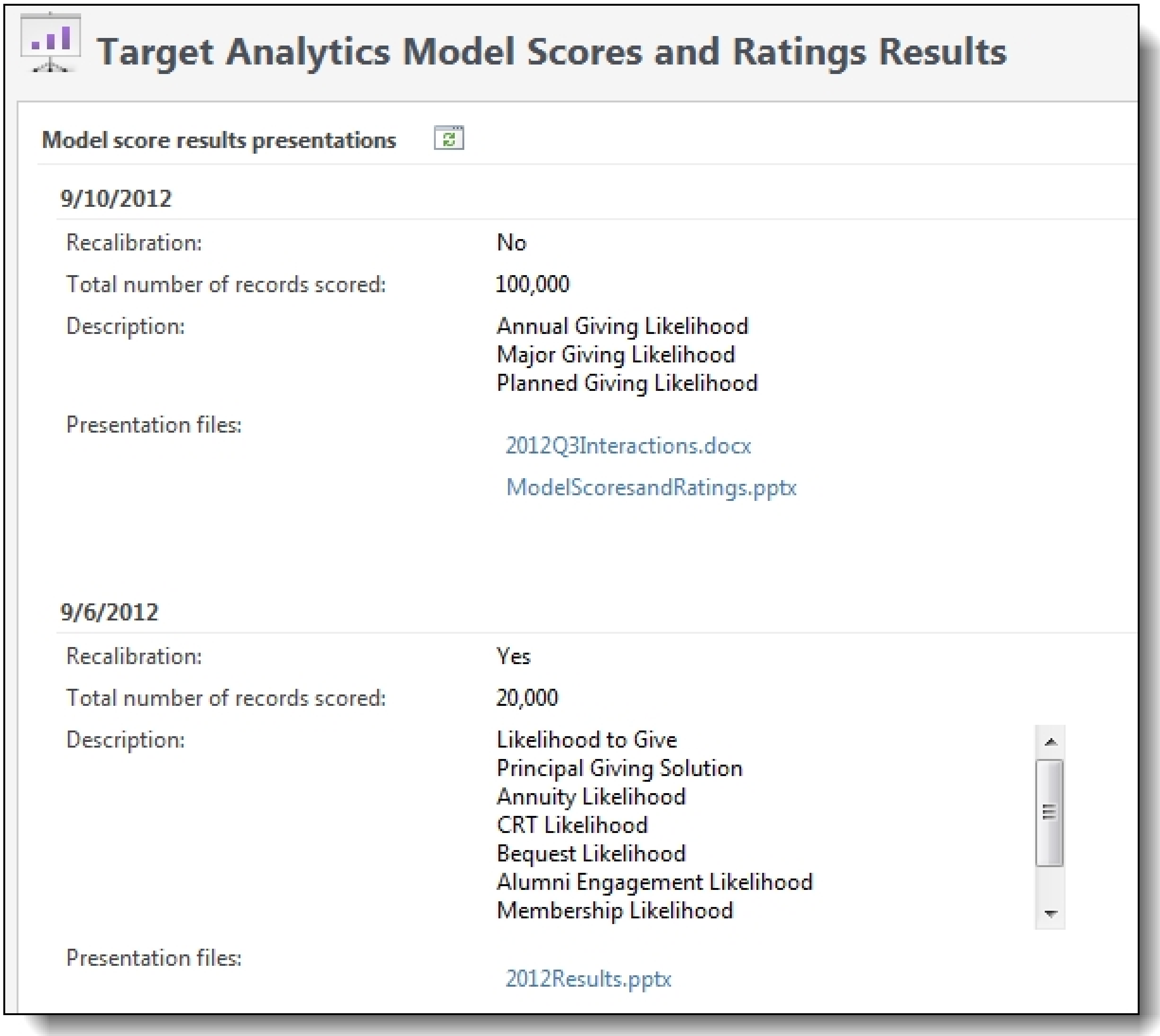
The following **Batch type** is available when you create a model score batch template:

Target Analytics Model Scores and Ratings Results

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

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

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



Batches for Model Scores

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

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

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

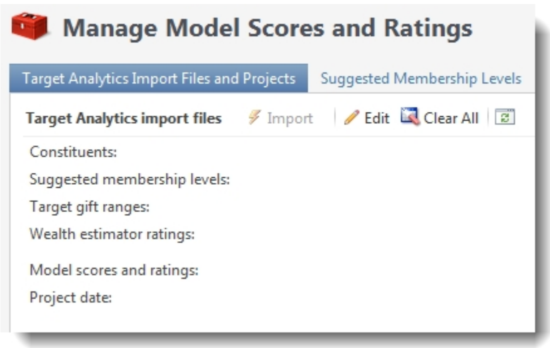
For more information on Batch Entry, see Model Score Updates through Batch Entry on page 168, and the *Batch and Import Guide*.

Edit Target Analytics Import Files

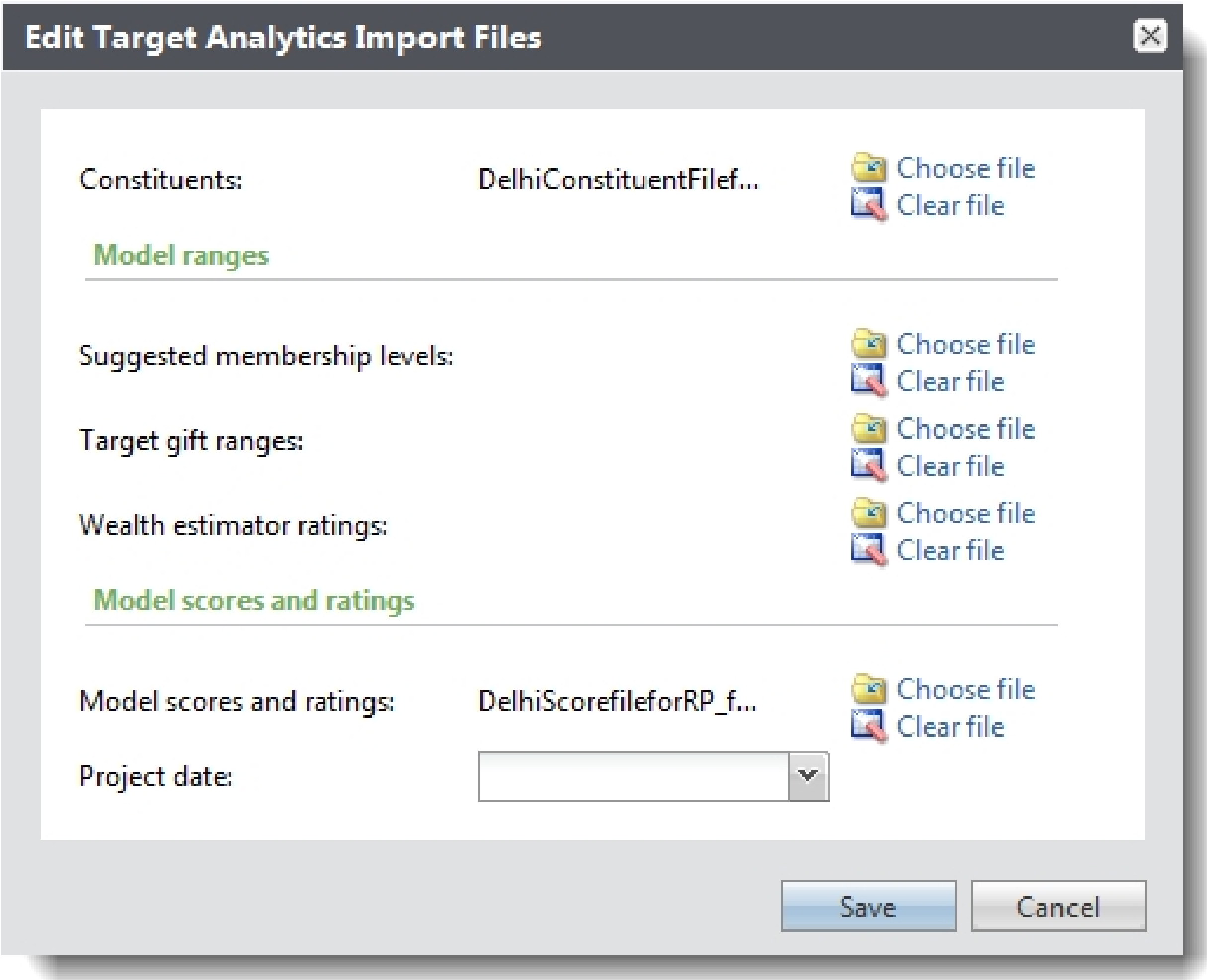
From the Manage Model Scores and Ratings page, users with proper administration rights can click on the Target Analytics Import Files and Projects tab to import and edit projects. If a project was used and the new scores are not from the same data set, you can create a new project. For instance, if a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

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

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



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



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

Projects, Distributions and Presentations

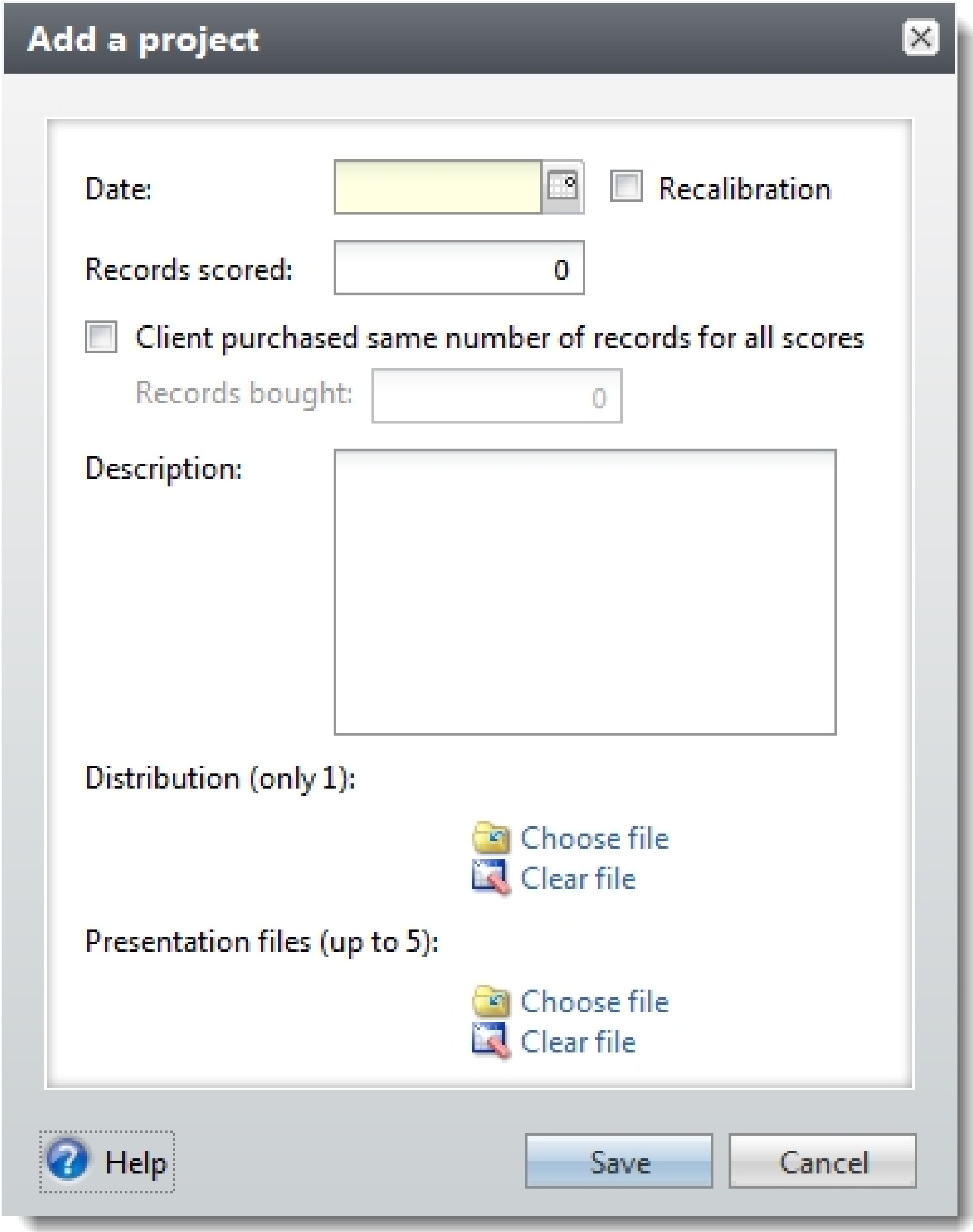
On the Manage Model Scores and Ratings tab, users with proper administration rights can create and edit model scores and ratings projects on the Target Analytics Import Files and Projects tab. You can also view distribution and presentation files uploaded by Target Analytics statisticians.

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

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

Add a project

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



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

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

3. In the **Recalibration** checkbox, indicate if the project is a model score recalibration and will score new records in a client's database. Recalibration helps the client see score changes over the past year.
4. In the **Records scored** field, enter the number of constituents for whom scores have been created.
5. Select **Client purchased same number of records for all scores** if the client purchased all records and scores. Clients can purchase any number of scores and records they wish.
6. In the **Records bought** field, enter the number of records purchased in this field.
7. In the **Description** field, enter a project description .
8. In the **Distribution** field, click **Choose File** to upload a distribution file. Distribution files appear in the expanded view of the Model scores and ratings tab on a client's Wealth and Ratings Management page. For more information on distribution files, see Distribution View on page 164. To clear an existing file, click **Clear File**.
9. In the **Presentation files** field, click **Choose File** to upload files such as PowerPoint presentations. You can upload up to five files. The file size limit is 28 megabytes. If you need additional file size, contact your web server systems administrator.

Prospect Asset Information

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

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

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

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

Also in the summary section on this page:

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

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

Real Estate Information

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect's real estate information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.
3. Expand the **Real estate** section.
4. Click **Add**. The Add real estate information screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Add Real Estate Information Screen

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

Property Tab

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

Field Name	Field Explanation
Source	Source of the real estate information.
Address information	Site address of the property.
APN (Assessor's parcel number)	Serial number assigned to the property.

Field Name	Field Explanation
Owner	Name of the constituent.
Care of name	Name of the individual responsible for the property.
Mailing address	Address of the name entered in the **Care of name** field..
Reported values	The reported **Sales amount** displays in the **Value** column and the date this amount was recorded in the **Reported date** column. The **Property valuation** is the largest of the following: property value estimate, assessed amount, market value, sales amount, loan amount, or second loan amount.
Notes	Any additional information about the property.

Assessment Tab

Field Name	Field Explanation
Assessee #1 name	Assessed owner as of the Lien date. This is the name exactly as shown in the current Assessor's Tax Roll.
Assessee #2 name	This name varies from county to county. It contains any additional assessed owner name when provided separately by the county. DBA names are preceded with indicator of "dba."
Care of name	If a C/O name is included in the assessment record, it is recorded here.
Assessee address	Any address information associated with the assessee is recorded here.
Recording date	Date of the most recent sale as listed on the county tax/assessment roll.
Document type	County description of the document type for most recent sale.
Tape cut date	Date sale was recorded.
Sales price	Price paid by the current owner of the property as listed on the county tax/assessment roll.
Sales price indicator	Identifies the sales price indicator: full amount, assessor qualified, partial amount, etc.
Assessed value year	Year property was assessed.
Assessed improvement value	Value attached to any structures or improvements made to the property in the last assessed year.
Assessed land value	Value attached to land alone in the last assessed year.
Total assessed value	Total assessed value of property (includes improvements and land).

Field Name	Field Explanation
Market value year	Year property market value was assigned.
Market improvement value	Market value attached to any structures or improvements made to the property.
Market land value	Market value attached to land alone.
Total market value	Total market value of property (includes improvements and land).

Assessment Detail tab

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

Deed tab

This tab houses ownership and property description information.

Field Name	Field Explanation
Buyer #1 name/Buy #2 name	Identifies buyers listed on the deed.
Buyer vesting	Indicates how the buyers took title to the subject property: community property, estate, family trust, etc.
Care of name	If a C/O name is included in the deed, it is recorded here.
Buyer address	Address recorded for the buyer.
Seller #1 name/Seller #2 name	Identifies sellers included on the deed.
Seller address	Address recorded for the seller.
Recording date	Date the parties record the deed. Post dates the recording date.
Document type	Indicates the deed document type: affidavit, conservator's deed, contract of sale, etc.
Date of contract	The date the document was executed by the parties. This pre-dates the recording date.
Sale price	Amount paid for property by current owner.
Loan amount	Total amount borrowed to purchase the property.

Field Name	Field Explanation
Loan type	Indicates the type of loan: cash, FHA, land contract, etc.
Type of financing	Indicates financing: adjustable rate, fixed rate, other.
Due date	Date the first trust deed will be paid in full.
Lender name	Name of the beneficiary to the first trust deed (mortgage). When more that one lender is reported, only the first lender included on the document is entered. If a Trust, along with Trustees appear as Lender, then the Trust Name is entered.
Title company	Name of title company which issues the certificate of title insurance. This information is taken from the Deed and/or Trust Deed.
Legal property description	Legal description of the property, which includes property use, lot code and number, block, unit number, city/township, subdivision, and a brief description.

Mortgage Tab

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

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

Confirm a prospect’s real estate information

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

Unconfirm a prospect’s real estate information

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

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.
3. For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's real estate information

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

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

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

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

3. For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry for which you want to undo the "Reject" status.
5. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s real estate information

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

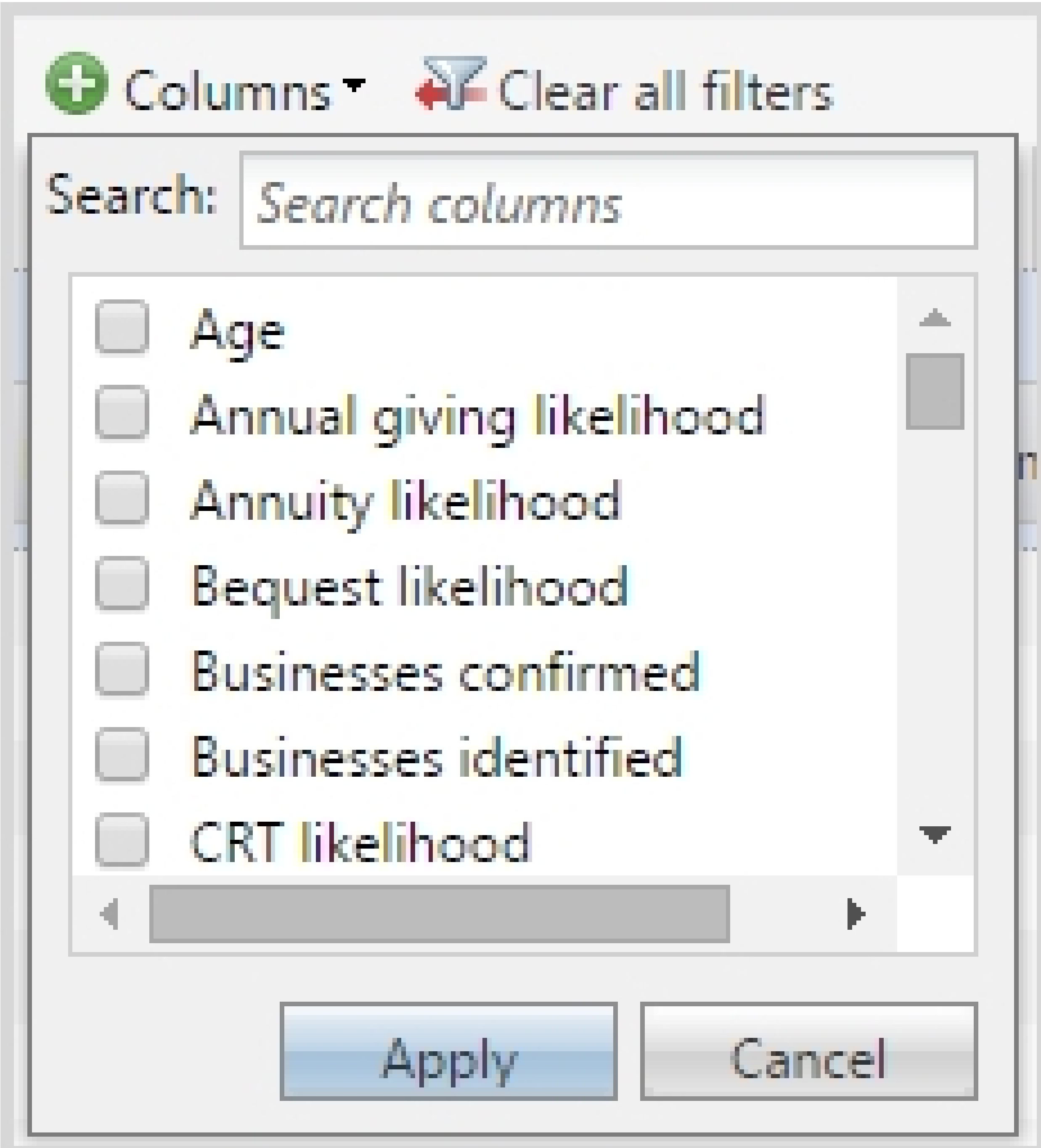
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Real estate** section.
3. For organizations and households, click **Real estate** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to delete.
5. On the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

Export a prospect’s real estate information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.



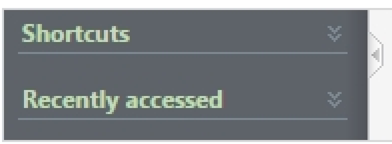
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.

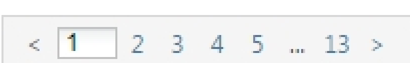
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Business Ownership Information

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

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

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect's business ownership information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.
3. For organizations and households, click **Businesses** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Click **Add**. The Add business ownership information screen appears displaying the Company tab.
5. To save your entry and return to the Assets tab, click **Save**.

Add Business Ownership Information Screen

Company Tab

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

Field Name	Field Explanation
Year of birth	Owner's birth date (individual constituents only).
Gender	Owner's gender (individual constituents only).

Biographies Tab

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

Valuation Tab (Individual constituents, not organizations)

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

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

Ownership Tab

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

Confirm a prospect’s business information

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

Unconfirm a prospect’s business information

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

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Business** section.
3. For organizations and households, click **Businesses** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's business information

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

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

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

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

3. For organizations and households, click **Businesses** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry for which you want to undo the "Reject" status.
5. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect's business information

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

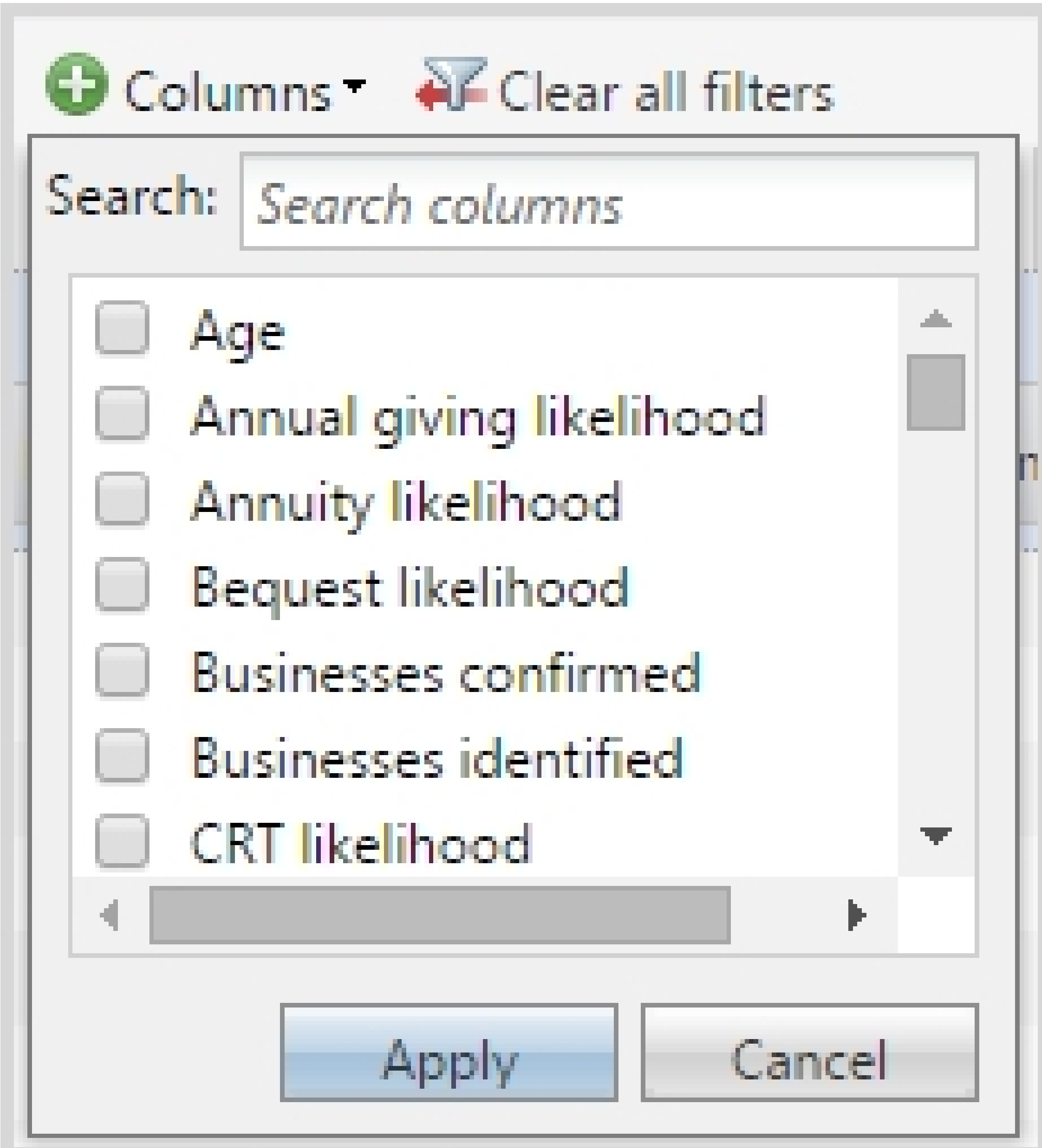
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Businesses** section.
3. For organizations and households, click **Businesses** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to delete.
5. On the action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

Export a prospect's business information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.



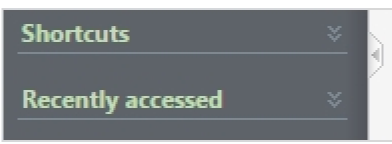
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.

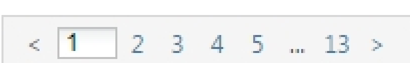
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Securities

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

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add Securities to an Individual Wealth and Ratings Record

On the Assets tab of a prospect record, you access constituent stock holding information in the Securities section. From this section, you can also add securities manually if you know of stock that was not returned from a WealthPoint screening.

If you need to add securities to an organization or household record, you add much less information about the stocks held. You only need to add the source, symbol, issuer name, holidngs information, and any additional notes.

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

Add securities for an individual constituent

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.
3. Click **Add**. The Add securities screen appears.
4. Enter the name listed as the owner of the stock and the filer ID number.
5. Enter the constituent’s relationship to the company.
6. Enter the ticker symbol for the securities. Once you enter the symbol, to see how the stock performed recently, you can use the research link to open the stock's page on Yahoo! Finance.

   Tip: Ticker symbol is an abbreviation used to identify a security. The ticker symbols for stocks trading on the NYSE or AMEX have one to three letters. NASDAQ stock ticker symbols can consist of four or five letters. If this field is blank, the company may no longer be publicly held.
7. In the **Issuer name** field, enter the name of the company in which the constituent owns stock.
8. CUSIP stands for Committee on Uniform Securities Identification Procedures. A CUSIP number identifies most securities, including stocks of all registered U.S. and Canadian companies, and U.S. government and municipal bonds. If you know the CUSIP, enter the number.
9. Under **Holdings**, enter the values for the direct and indirect ownership of stock.
   - **Date** = Date of last action
   - **Quantity** = number of shares directly or indirectly held by the constituent
   - **Price** = approximate current share price of the stock
   - **Value** = product of the share price multiplied by the number of shares.
10. Under **Properties**, enter the source of the stock information and any additional notes.
11. Select the Transactions tab.
12. On the Transactions tab, if known, you can enter the number of shares held, date the security transaction took place, share price at time of transaction, the ownership type, a brief description,

and the proceeds or costs result from the transaction.

13. To save your entry and return to the Assets tab, click **Save**.

Add Securities Screen

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

Fields Tab (Individual constituents only, not organizations)

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

Transactions Tab (Individual constituents only, not organizations)

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

Add Securities Screen (Organization constituents only, not individuals)

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

Confirm a prospect’s stock holding information

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

Unconfirm a prospect’s stock holding information

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

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

Reject prospect's stockholding information

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

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

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

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

Delete a prospect’s stock holding information

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

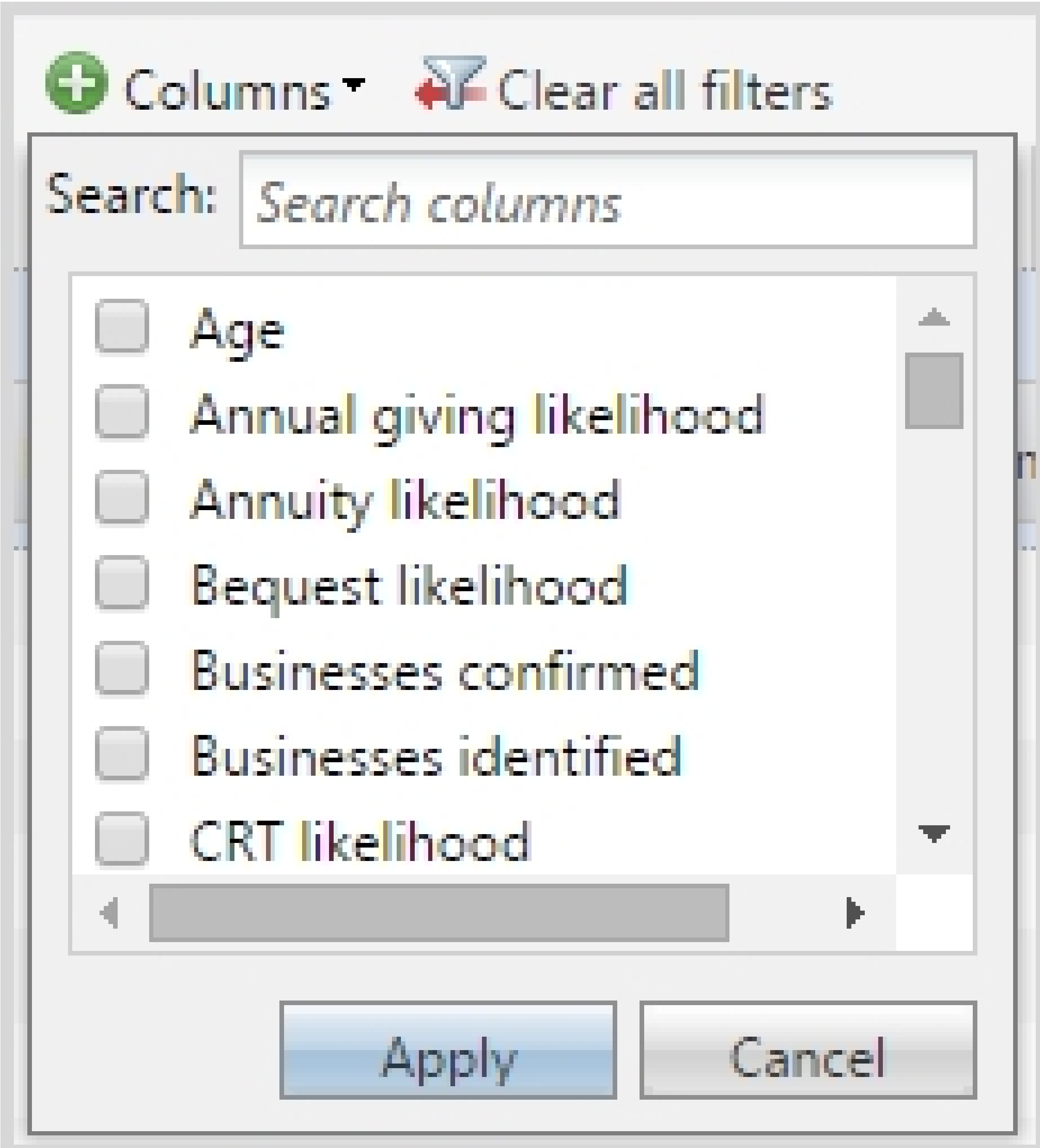
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Securities** section.
3. For organizations and households, click **Securities** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to delete.
5. On the action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

Export a prospect's stock holding information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

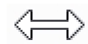


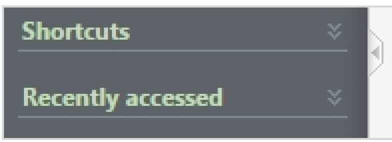
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.

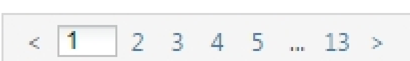
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Transaction Page

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

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

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

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

Add new transaction to an existing securities record

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

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

2. In the grid, click the entry to which you want to add transaction information.
3. Click **Add**. The Add security transactions screen appears.
4. Click **Save** to save the entry and return to the transactions page.

Add Transaction to Existing Securities Record

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

Add new transaction to an existing securities record

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

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

2. In the grid, click the entry to which you want to add transaction information.
3. Click **Add**. The Add security transactions screen appears.
4. Click **Save** to save the entry and return to the transactions page.

Add new transaction to an existing securities record

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

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

2. In the grid, click the entry to which you want to add transaction information.
3. Click **Add**. The Add security transactions screen appears.
4. Click **Save** to save the entry and return to the transactions page.

Wealth Indicators

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

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

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

> ***Note:*** For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect’s wealth indicator information

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

Add Wealth Indicator Information Screen

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

Personal Tab

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

Contact Tab

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

Confirm a prospect's wealth indicator information

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

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

Unconfirm a prospect's wealth indicator information

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

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

Reject prospect's wealth indicator information

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

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

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

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

Delete a prospect's wealth indicator information

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

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Wealth indicators** section.
3. In the grid, expand the entry you want to delete.

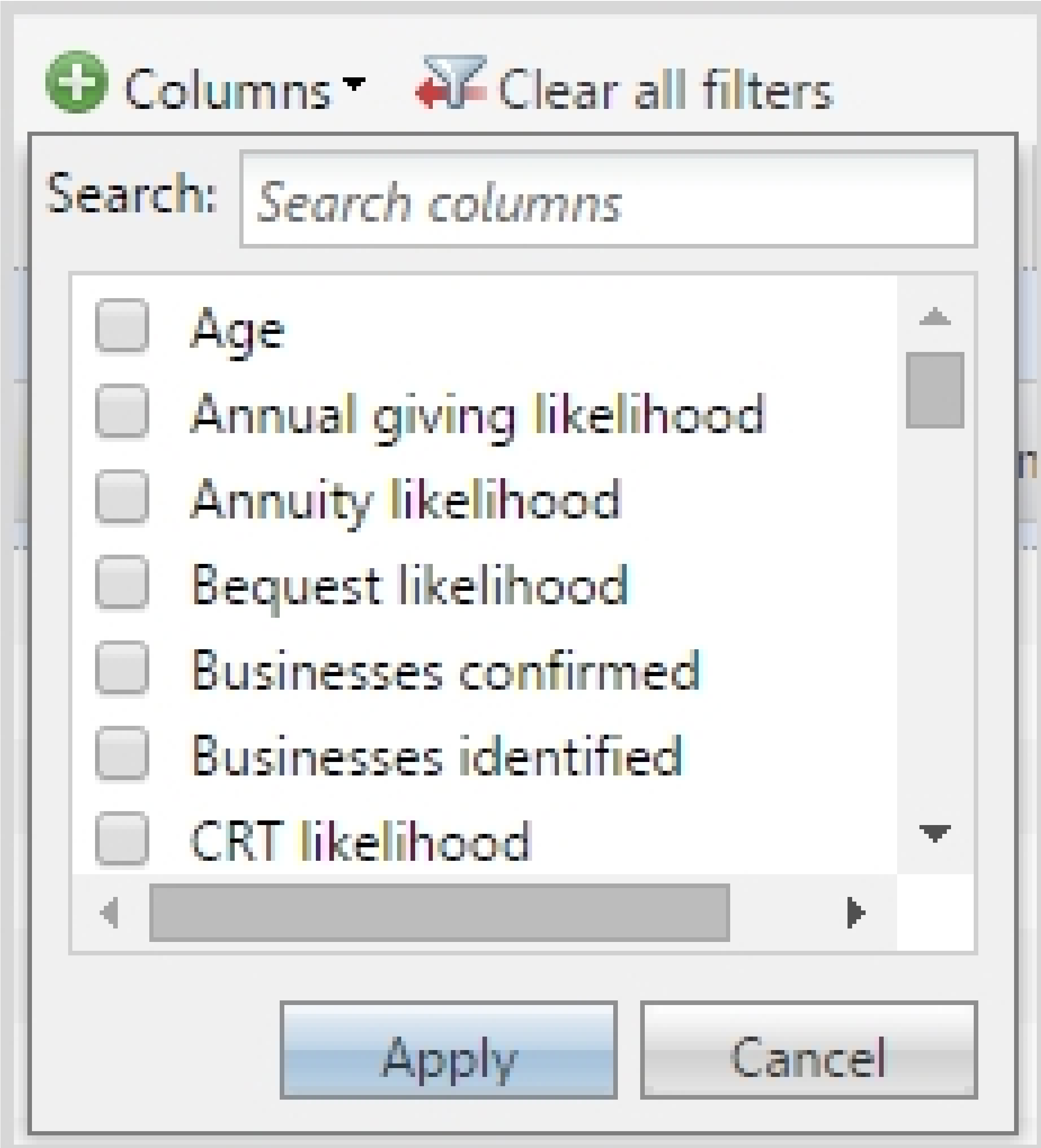
4. On the action bar, click **Delete**. A confirmation screen appears.
5. Click **Yes** to remove the entry.

Export a prospects's wealth indicator information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

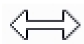


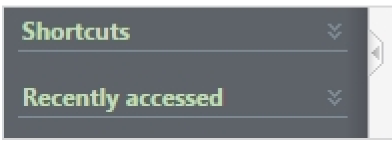
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



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

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

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

List Pagination

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

Use Search

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

Members List Links

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

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

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

Income/Compensation

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

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect’s income and compensation information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.
3. For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Click **Add**. The Add income/compensation screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Add Income/Compensation Information Screen

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

Field Name	Field Explanation
Source	Source of the income/compensation information.
Company	Name of the company with which the constituent is associated.
Symbol	Ticker symbol is an abbreviation used to identify a security. The ticker symbols for stocks trading on the NYSE or AMEX have one to three letters. NASDAQ stock ticker symbols can consist of four or five letters. If this field is blank, the company may no longer be publicly held.
Name	Constituent's name as listed on the proxy statement.
Job title	Constituent's title in the corporation.
Officer/Director	If the constituent holds an officer's title (CEO) or a director's title (Active Director of the board).
Officer Start	If the constituent is an officer, this field displays his start date.
Director Start	If the constituent is a director, this field displays his start date.
Age	Constituent's age.
Compensation frame	Displays information about any compensation the constituent received as a result of his position in the company: **Year** - Year compensation received; **Salary** - Amount of compensation classified as salary; **Bonus** - Amount of compensation classified as bonus; **Other Short Term** - Amount of any short term compensation (company car); **Other Long Term** - Amount of any long term compensation.
Options frame	Displays information about any options exercised by the constituent: **Exercised** - Value of any options exercised in the reporting year; **Unexercised** - Value of options available but not yet exercised by the constituent in the reporting year; **Unexerciseable** - Value of options granted but not vested as of reporting year.
Biography	Information about the constituent provided by the reporting company.
Notes	Enter any notes associated with the data source information.

Confirm a prospect's income/compensation information

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

Unconfirm a prospect’s income/compensation information

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

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.
3. For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.

Reject prospect's income/compensation information

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

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

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

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

Delete a prospect’s income/compensation information

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

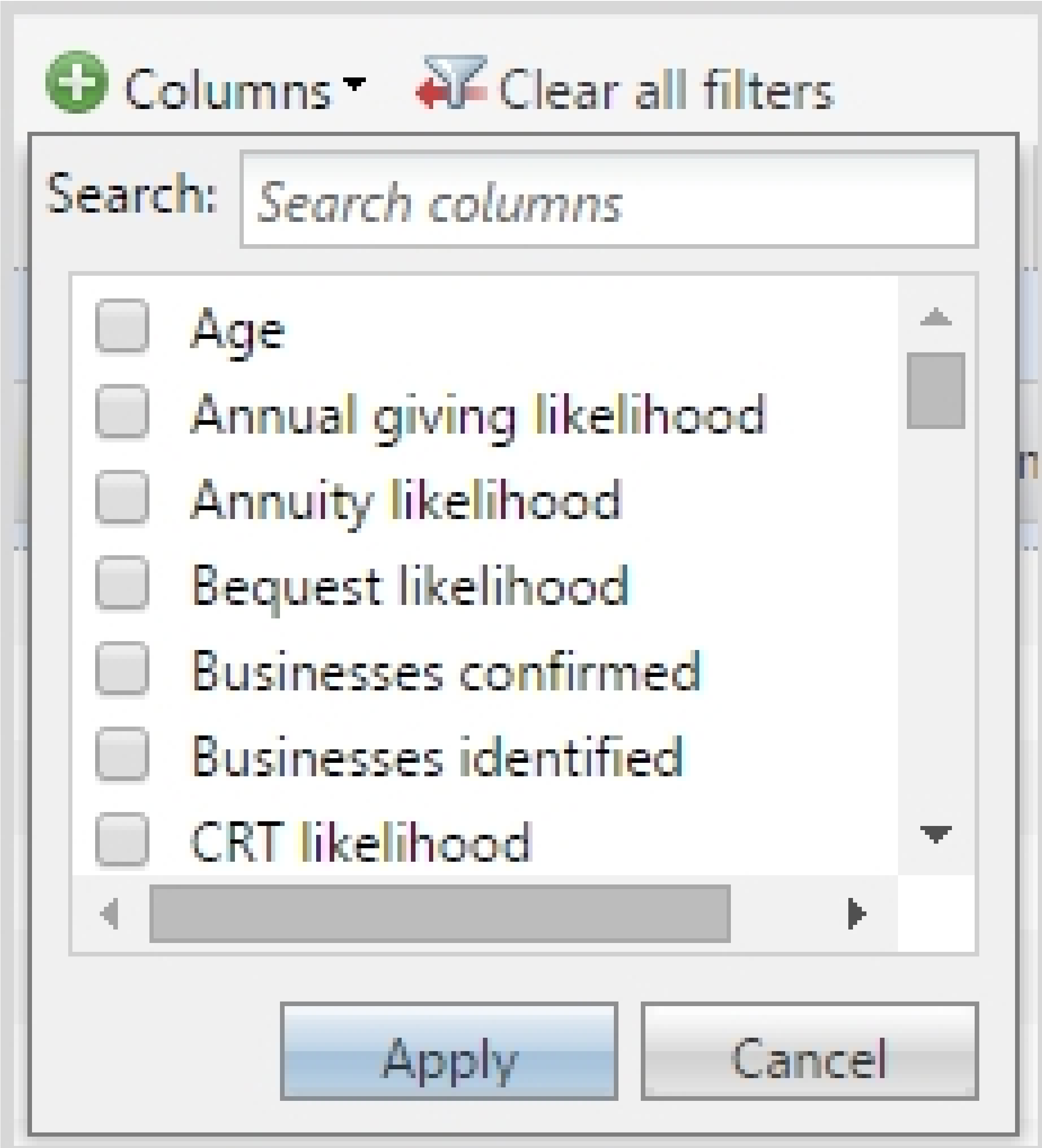
1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.
3. For organizations and households, click **Income/compensation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to delete.
5. On the action bar, click **Delete**. A confirmation screen appears.
6. Click **Yes** to remove the entry.

Export a prospect's income/compensation information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

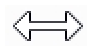


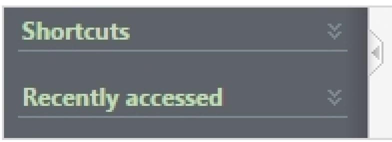
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



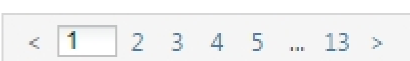
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Other Assets

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect’s miscellaneous asset information

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Other assets** section.
3. For organizations and households, click **Other assets** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Click **Add**. The Add other assets screen appears.
5. To save your entry and return to the Assets tab, click **Save**.

Add Other Assets Screen

Field Name	Field Explanation
Source	How you learned about this asset.

Field Name	Field Explanation
Description	Description of the other asset.
Value	Value of the other asset.
Notes	Enter any additional information about the asset.

Confirm a prospect’s miscellaneous assets information

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

Unconfirm a prospect’s miscellaneous asset information

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

1. From the prospect's Wealth and Ratings screen, click the Assets tab.
2. Expand the **Income/compensation** section.
3. For organizations and households, click **Other assets** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, expand the entry you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.

Reject prospect's miscellaneous asset information

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

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

Undo "Reject" on a prospect’s miscellaneous information

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

Delete a prospect’s miscellaneous information

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

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

Export a prospect’s miscellaneous asset information

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

Open the export file

Open the folder in which the export file was saved

View all downloads

Prospect Giving Information

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

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

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

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

Also in the summary section on this page:

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

Philanthropic Gift Information

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

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

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

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a prospect’s charitable donation information

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

4. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
5. To save your entry and return to the Giving tab, click **Save**.

Add Philanthropic Gift Information Screen

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

Edit a prospect's charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.

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

Confirm a prospect’s charitable donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to confirm.
5. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s charitable donation information

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's philanthropic gift information

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to reject.
5. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. In the grid, select the entry for which you want to undo the "Reject" status.
4. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
5. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s philanthropic gift information

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. In the grid, select the entry you want to delete.
4. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
5. On the action bar, click **Delete**. A confirmation screen appears.
6. Click **Yes** to remove the entry.

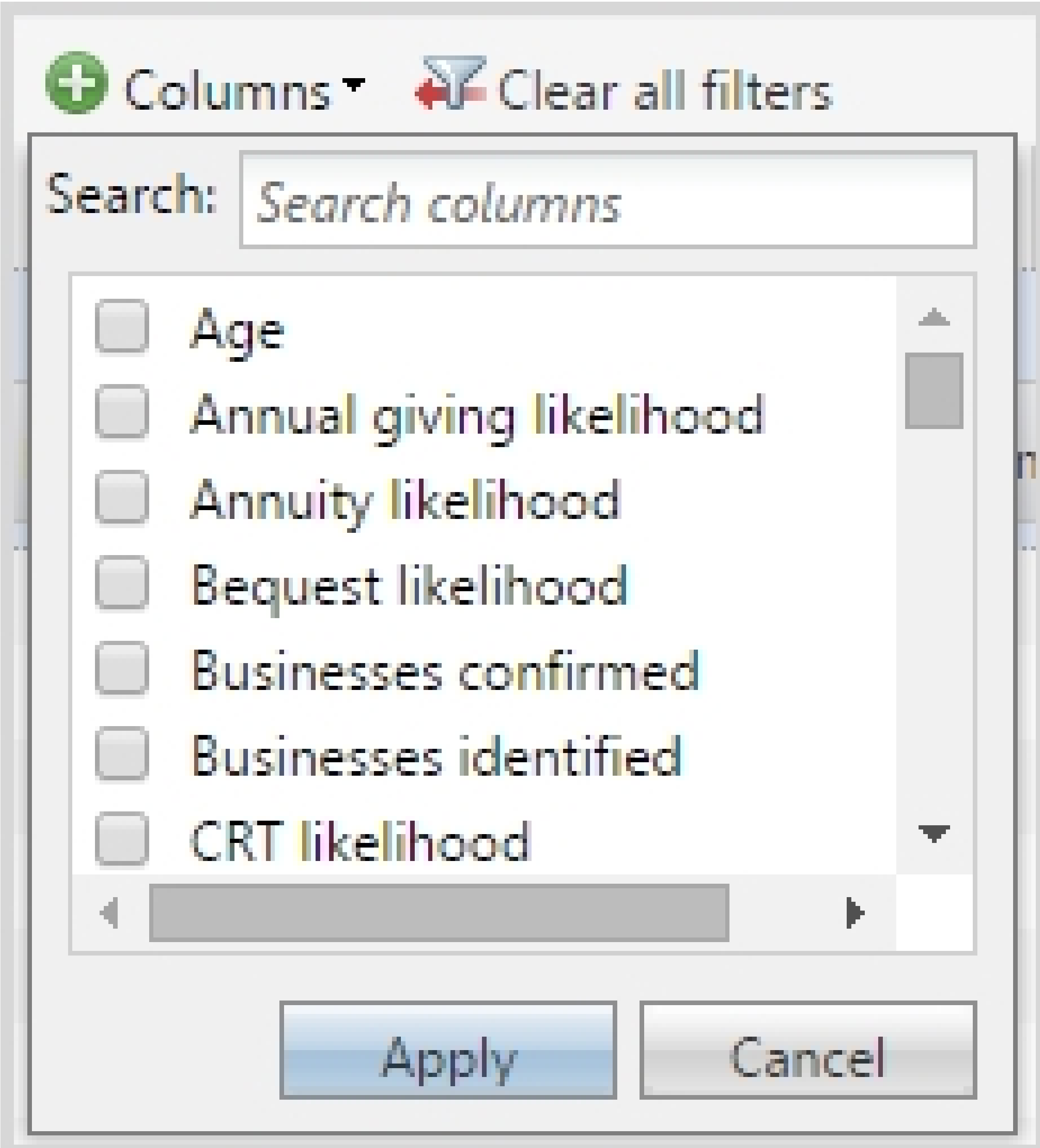
Export a prospect’s philanthropic gift information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Philanthropic gifts** section.
3. For organizations and households, click **Philanthropic gifts** in the **Wealth summary** section of the Wealth and Ratings screen.
4. From the menu bar in the section, click the drop-down arrow next to **Export list**.
5. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
6. At the bottom of the page, a message box appears. From here, you can:
   - Open the export file and review the content before saving
   - Save the export file to a location you select
   - Cancel the export process
7. If you save the export file, a new message box appears, allowing you to:

- Open the export file
- Open the folder in which the export file was saved
- View all downloads

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

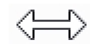


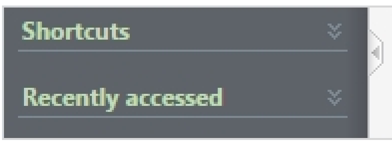
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



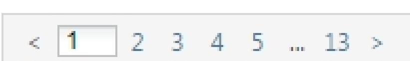
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Political Donations

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

For organizations, groups, and households, the Wealth and Ratings - Political Donations page tracks all political giving located for this prospect/household.

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Adding constituent political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Click **Add**. The Add political donation screen appears.
5. To save the entry and return to the Giving tab, click **Save**.

Add Political Donation Screen

Field Name	Field Explanation
Source	Source of the political donation information.
Recipient	Name of the individual or organization receiving the donation.
Date	Date of contribution.

Field Name	Field Explanation
Amount	Amount of contribution.
Name	Donor’s name.
Occupation	Donor’s occupation. This information is self-reported by the donor.
City, State, ZIP	Donor’s address information.
Notes	Enter any notes associated with the data source information.

Edit prospect's political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to edit.
5. Click **Edit**. The Edit Political Donation screen appears.
6. To save your entry and return to the Giving tab, click **Save**.

Confirm a prospect’s political donation information

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to confirm.
5. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.

Unconfirm a prospect’s political donations information

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to unconfirm.

5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject prospect's political donation information

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to reject.
5. On the action bar, click **Reject**. A red warning icon displays in the **Confidence** column and the rating number is changed to "0."

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

1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry for which you want to undo the "Reject" status.
5. On the action bar, click **Clear status** to remove the red warning icon from the **Confidence** column and return the record to its previous status.

Delete a prospect’s political donation information

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

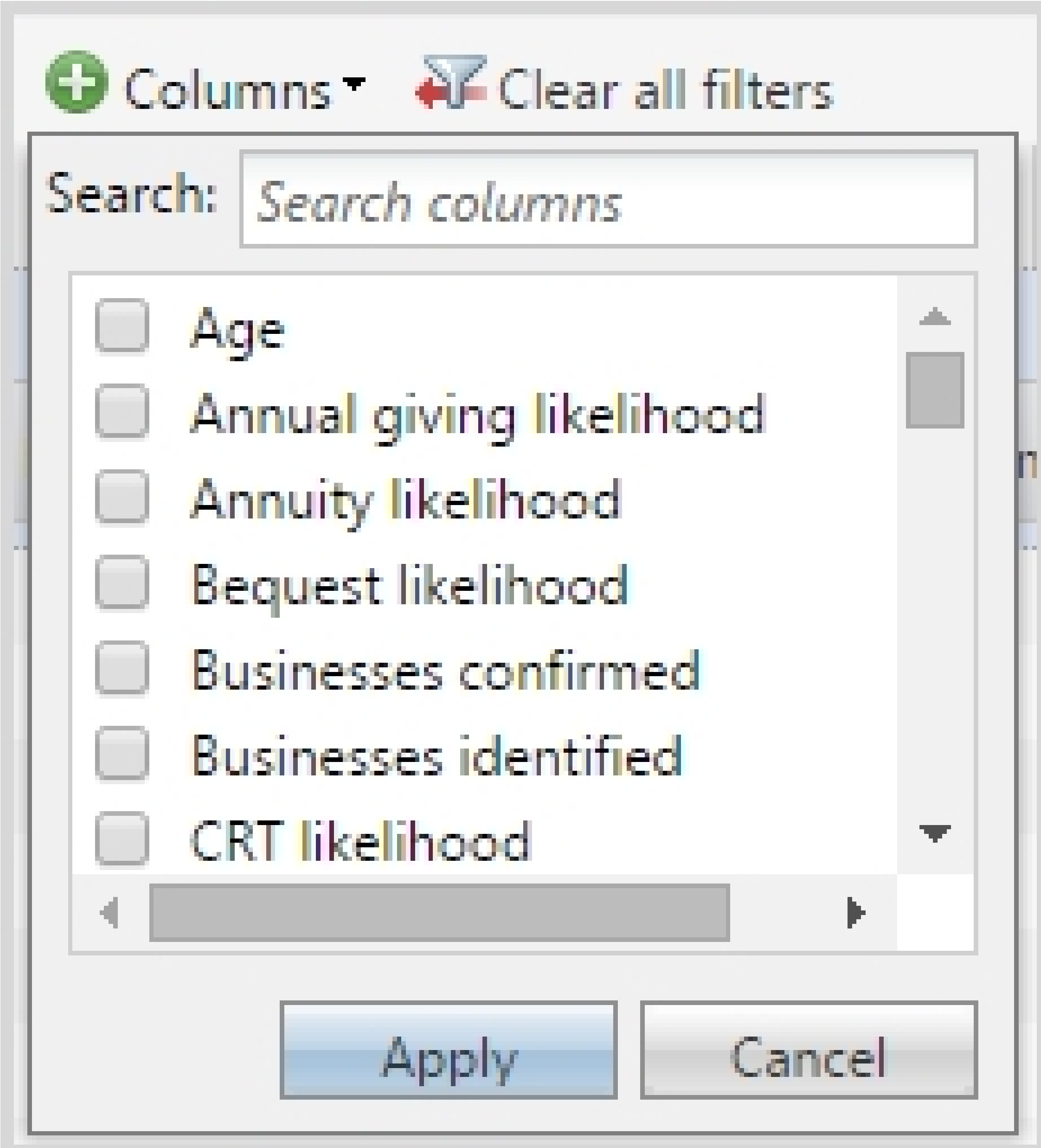
1. From the prospect's Wealth and Ratings screen, click the Giving tab.
2. Expand the **Political donations** section.
3. For organizations and households, click **Political donation** in the **Wealth summary** section of the Wealth and Ratings screen.
4. In the grid, select the entry you want to delete.
5. On the action bar, click **Delete**. A confirmation screen appears.
6. Click **Yes** to remove the entry.

Export a prospects's political donation information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

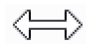


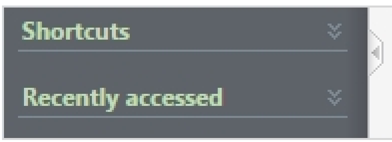
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



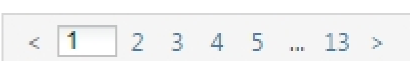
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Wealth Affiliations

The Affiliations tab on a prospect's Wealth and Ratings screen houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies. A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "memeber" are common constituent constituencies.

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

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

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

Also in the summary section on this page:

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

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

Nonprofit Affiliations Information

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

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add a constituent's nonprofit affiliation information

1. From the prospect's Wealth and Ratings page, select the Affiliations tab.
2. In the **Non-profit affiliations** section, click **Add**. The Add nonprofit affiliation information screen appears.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. To save your entry and return to the Affiliations tab, click **Save**.

Add Nonprofit Affiliation Information Screen

Field Name	Field Explanation
Source	Source of the nonprofit affiliation information.
Organization	Name of the nonprofit organization with which the constituent has an officer/director relationship.
Description	A description of the nonprofit.
Address, City, State, ZIP	Nonprofit organization's address information.
EIN	The constituent's employer identification number.
Revenue	Revenue generated by nonprofit.
Total assets	Fair market value of all nonprofit's assets.
Phone	Nonprofit organization's phone number.
Website	Nonprofit's Website address.
Org. form year	The year entered on the nonprofit affiliation forms (used to retain 501(c)(3) status).
Ruling year	The year that the IRS granted an organization 501(c)(3) status.

Field Name	Field Explanation
Name	Constituent's name.
Location city, Location state, and **Location ZIP**	The affiliated constituent's location information.
Job title	Constituent's title with the nonprofit organization.
Salary	Salary amount the nonprofit pays the constituent.
Form year	The year the constituent's affiliation with the nonprofit started.
Notes	Enter any notes associated with the data source information.

Edit a constituent's nonprofit affiliation information

1. From the constituent's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Locate and select the record you want to change.
5. Click **Edit**. The Edit nonprofit affiliation information screen appears.
6. Enter the new information. The fields and options included on this screen are the same as those on the Add nonprofit affiliation information screen.
7. To save your entry and return to the Affiliation tab, click **Save**.

Confirm a constituent's nonprofit affiliation information

1. From the constituent's Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Locate and select the record you want to confirm.
5. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.
6. Click **Clear status** to remove the check mark from the **Confidence** column and return the status to "Unconfirmed".

Unconfirm a prospect's nonprofit affiliation information

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

1. From the prospect’s Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Locate and select the record you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed.”

Reject constituent nonprofit affiliation information

1. From the prospect’s Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Locate and select the record you want to reject.
5. On the action bar, click **Reject**. The “Reject” icon displays in the **Confidence** column.
6. Click **Clear status** to remove the icon from the **Confidence** column.

Delete a prospect’s nonprofit affiliation information

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

1. From the prospect’s Wealth and Ratings page, select the Affiliations tab.
2. Near the middle of the tab, expand the **Non-profit affiliations** section.
3. For organizations and households, click **Non-profit affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Locate and select the record you want to delete.
5. On the action bar, click **Delete**. A confirmation screen appears.
6. Click **Yes** to remove the entry.

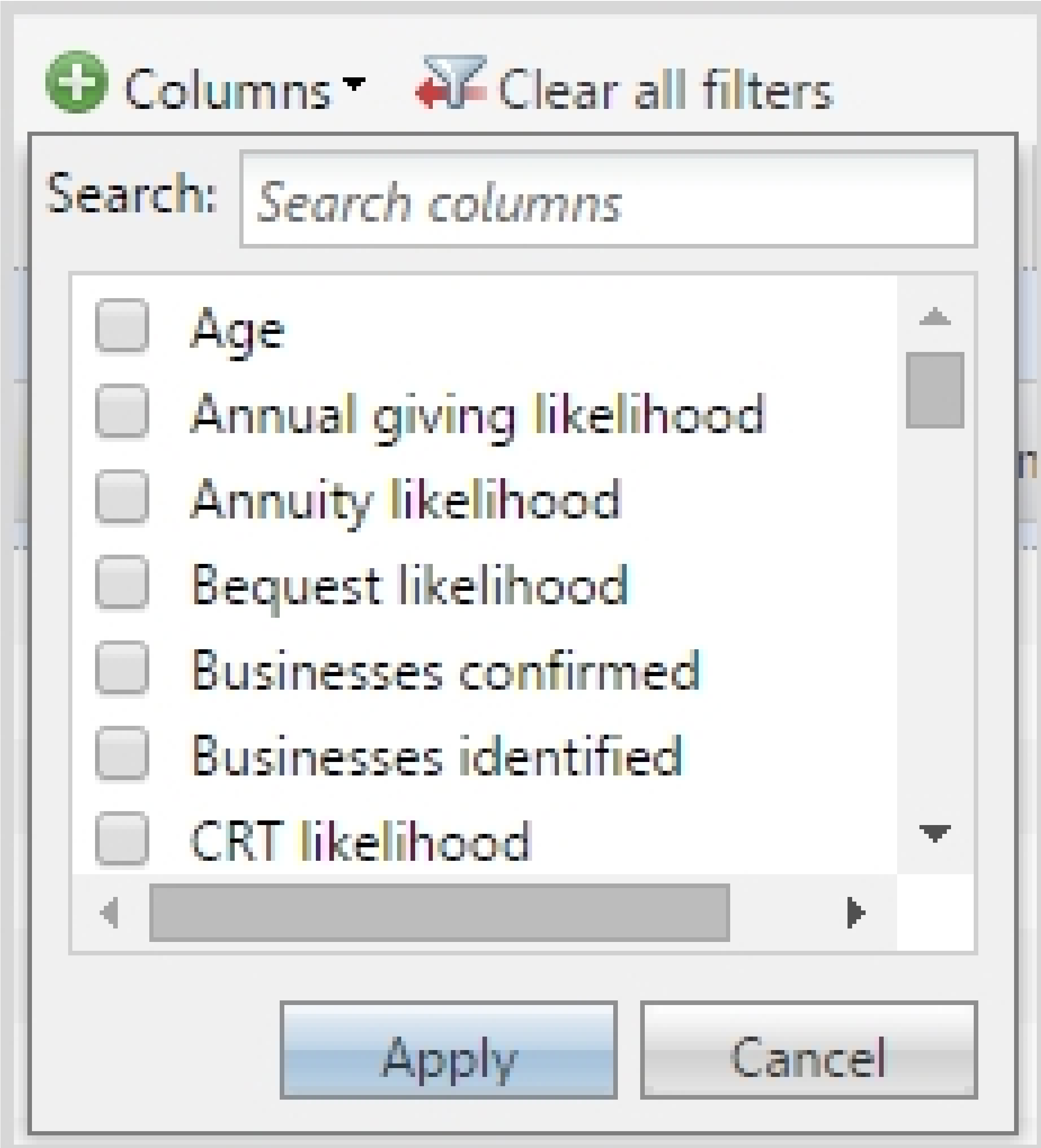
Export a prospect’s non-profit affiliation information

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

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

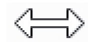


Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.

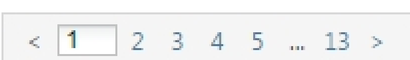
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Foundations

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

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

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

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

Note: For a group or household, you can also filter information to display by selecting a specific group **Member**.

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Add foundations information to a constituent wealth record

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Click **Add**. The Add foundation affiliation information screen appears.
5. To save your entry and return to the Affiliations tab, click **Save**.

Add Foundation Affiliation Information Screen

Field Name	Field Explanation
Source	Source of the foundation affiliation information.

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

Edit constituent Foundation affiliations information

1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Expand the record you want to change.
5. Click **Edit**. The Edit foundation affiliation information screen appears.
6. Make any necessary changes.
7. Click **Save**.

Confirm a constituent’s Foundation affiliation information

1. From the constituent’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Expand the record you want to confirm.
5. On the action bar, click **Confirm**. A check mark appears in the **Confidence** column of the grid.
6. Click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed”.

Unconfirm a prospect’s foundation affiliation information

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

1. From the prospect’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Expand the record you want to unconfirm.
5. On the action bar, click **Clear status** to remove the check mark from the **Confidence** column and return the status to “Unconfirmed”.

Reject constituent Foundation affiliation information

1. From the constituent’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Expand the record you want to reject.
5. On the action bar, click **Reject**. The “Reject” icon appears in the **Confidence** column.
6. Click **Clear status** to remove the icon from the **Confidence** column and return the status to “Unconfirmed”.

Delete a constituent’s Foundation affiliation information

Before deleting an entry, permanently removing it from your system, you may want to consider designating it with the “Reject” tag. Using the **Reject** option, you can remove information from consideration, without permanently removing it from your system. For more information, see Reject constituent Foundation affiliation information on page 236.

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

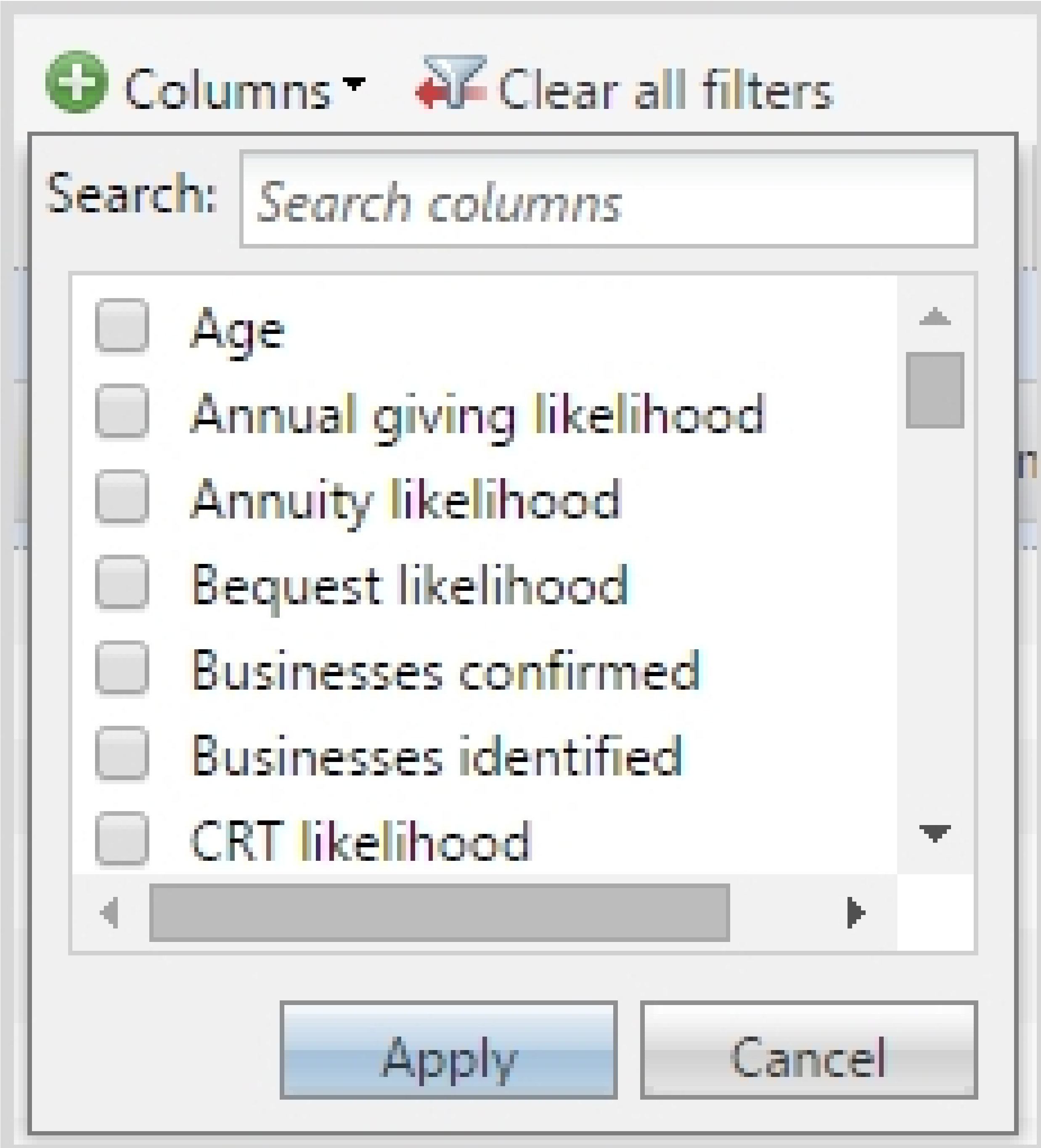
1. From the constituent's Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Foundation affiliations** section.
3. For organizations and households, click **Foundation affiliations** in the **Wealth summary** section of the Wealth and Ratings screen.
4. Expand the record you want to delete.
5. On the action bar, click **Delete**. A confirmation screen appears.
6. Click **Yes** to remove the record.

Export a prospects's foundation information

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

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.

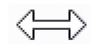


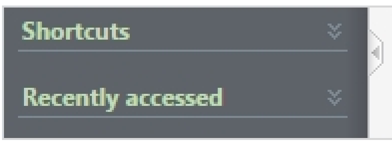
Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

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

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

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

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



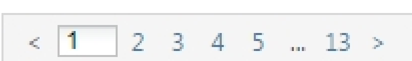
- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel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

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

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

List Pagination

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



Use Search

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

Members List Links

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

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

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

Network Connections

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

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

For information about managing your columns and filtering and searching content in the grid, see Display Tips for Members List on page 237.

Edit prospect network connection link

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

Confirm a prospect network connection relationship

1. From the prospect’s Wealth and Ratings screen, select the Affiliations tab.
2. Near the middle of the tab, expand the **Network connections** section.

3. Expand the entry you want to confirm.
4. Click **Confirm relationship**. The Edit link to organization constituent screen appears.
5. Make any necessary changes.
6. Click **Save**.

Export a prospect’s network connection information

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

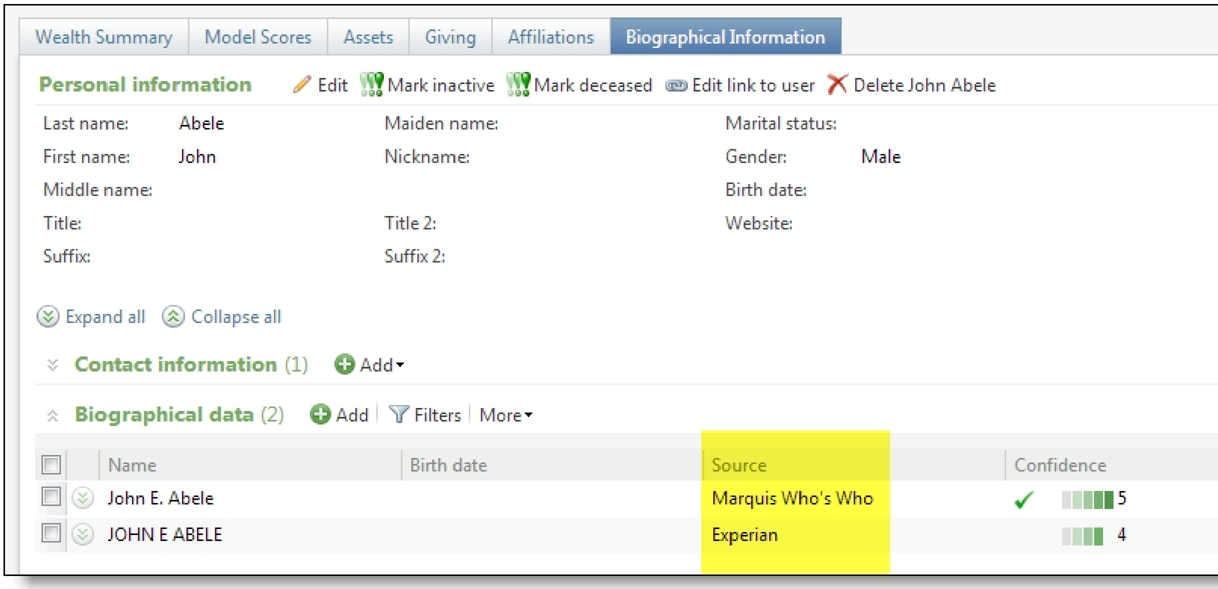
Biographical Information

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

The Biographical Information tab on a prospect’s Wealth and Ratings screen houses biographical data from Marquis Who’s Who and Experian obtained from a ***WealthPoint*** screening.

View prospect biographical information imported from Marquis Who’s Who or Experian

1. From the prospect’s Wealth and Ratings page, select the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display.
3. The **Source** column displays from which data source the information was gathered.



4. Expand any record to view record details. From the expanded view, you can also confirm, reject, edit, or delete the data.

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

Filter Biographical Data Display

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

Prospect Biographical Data

On the Biographical Information tab, you can view prospect biographical information imported from Marquis Who's Who or Experian.

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

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

How to add biographical data

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

About the Name & Address tab

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

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

About the Bio 1 tab

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

Field Name	Field Explanation
Education box	Information collected about the constituent's education.

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

About the Bio 2 tab

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

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

About the Career tab

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

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

Add Biographical Information Screen

Name and Address Tab

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

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

Bio 1 Tab

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

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

Bio 2 Tab

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

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

Career Tab

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

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

Edit Biographical Data from Marquis Who's Who

1. From the prospect's Wealth and Ratings page, select the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display. The **Source** column displays from which data source the information was gathered.
3. Expand any record you want to edit.
    - Click **Edit**. The Edit biographical information screen appears, displaying the Name & address tab.

- The Name & address tab includes name, home address, business address, birth information, and gender. You can edit any information contained on this screen.
- The Bio 1 tab includes education, personal, family, award, and membership information.
- The Bio 2 tab includes civic and military service information.
- The Career tab includes career, occupation, position, and certification information.

4. To save your changes and return to the Biographical tab, click **Save**.

Edit Biographical Data from Experian

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

1. From the prospect’s Wealth and Ratings page, select the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display. The **Source** column displays from which data source the information was gathered.
3. Expand any record you want to edit.
4. Click **Edit**. The Edit biographical data screen appears.
5. Make any necessary changes.

   Note: When editing Experian data, fields left empty on the edit screen do update in the ***ResearchPoint*** record if the Experian record contained data for the fields. For example, if the Birth date field displays empty when editing, but birth date information is included in the Experian record, this information is included in the ***ResearchPoint*** record.
6. To save your changes and return to the Biographical tab, click **Save**.

Confirm Biographical Data

1. From the prospect's Wealth and Ratings screen, click the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display.
3. Expand any record you want to confirm.
4. Click **Confirm**. When confirming Experian data, the Update <prospect name> record appears, allowing you to review and edit data before confirming.

   Note: When confirming Experian data, blank fields on the ***ResearchPoint*** record update automatically. For example, if the Experian record has a birth date and the ***ResearchPoint*** record does not, upon confirming the Experian record, the birth date automatically transfers to the **ResearchPoint** record.
5. A check mark appears in the **Confidence** column.

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

Unconfirm a prospect's biographical data information

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

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

Reject prospect biographical data information

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

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

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

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

Delete a prospect's biographical data information

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

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

Export a prospects's biographical data information

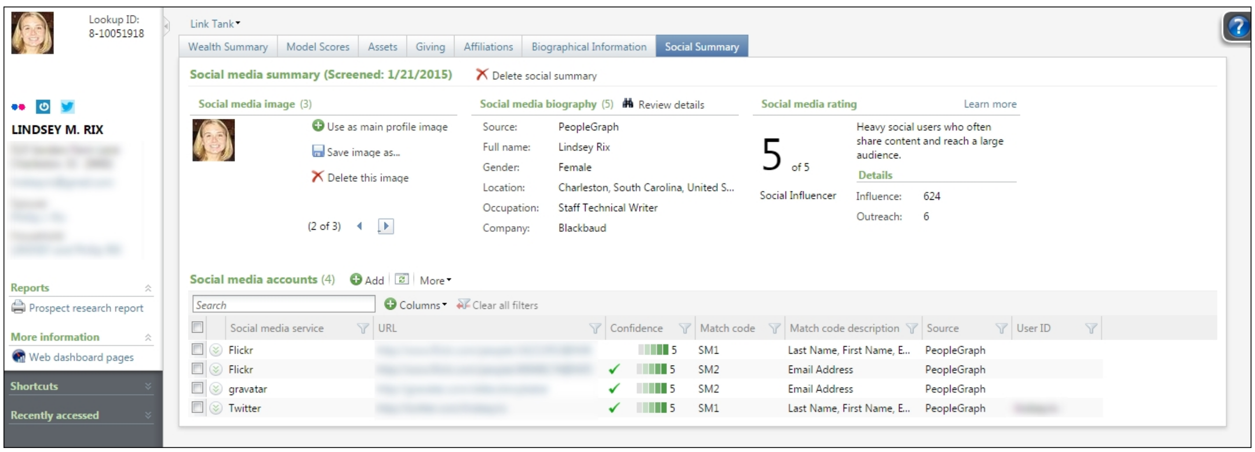
1. From the prospect's Wealth and Ratings screen, click the Biographical Information tab.
2. Expand the **Biographical data** section.
3. From the menu bar in the section, click the drop-down arrow next to **Export list.**
4. The drop-down **menu** allows you to export the content to a CSV or XLSX format. Select your format.
5. At the bottom of the page, a message box appears. From here, you can:

   a. Open the export file and review the content before saving
   b. Save the export file to a location you select
   c. Cancel the export process

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

Social Summary

On the Social Summary tab, you track the social media accounts for your prospects.



Social Media Images

When *PeopleGraph* searches for your prospect, they return one social media image per email address. However, because it's an image, *PeopleGraph* can't determine which profile image from a social media account most looks like your prospect. For example, is the picture that returns for a social media account a headshot, group photo, beloved pet, grandchild, or a field of flowers? Instead, *PeopleGraph* picks the best image based on a formula they developed. The formula to decide which image to return for each email address is based on which account they determine most important. Therefore, the social media images that return may not be what you consider most important in the prospect research world.

We recommend you review the images and delete those that are not applicable. However, just like other data from *WealthPoint*, it can return on your next wealth screen. If there is an image that captures the prospect well, you can easily use the image as your main profile image or save to your computer. When you scroll through the images that return, click **Use as main profile image** to quickly update the constituent's main profile image. The old constituent image deletes and is replaced by the new one from your WealthPoint screen.

Social Media Ratings

The influence and outreach scores are provided by *PeopleGraph* and are based on *Twitter* accounts. If a prospect does not return a *Twitter* account, they will not have ratings.

The Social Media rating is based on a Target Analytics algorithm. Among other factors, the algorithm does consider the influence rating, outreach rating, and number of social media accounts returned.

For more information about the meaning of the social media, influence, and outreach ratings, review the rating descriptions.

Social Media Data Recommendations

While social media is a quickly evolving yet newer field of data, there is much to be done with the data that does return. Use these ideas for how to leverage social media information to the benefit of your organization.

1. Use social media accounts to verify information about your prospect including occupation, employer, interests, and affiliations.
2. Use social media to identify your most important content cultivators and influencers. Not only can you search for prospects who have the capacity to donate to your organization but you can identify people who can use their great influence on social media to promote your cause. For example, have you heard that your organization is planning an important event? You may want to consider researching and providing your event coordinators a list of those with great social media influence so they can invite them to the event. Well connected individuals can help promote the event and increase awareness.
3. Use social media to confirm relationships and connections. Can you identify someone at your organization (donor, employee, trustee) that already has an established relationship with the new prospect? Social media can help you determine if there's someone who can give your fundraisers the edge with a personal introduction.
4. Which social media services should you invest your time developing a strong message and network for your organization? Base your decision on the most popular social media accounts that return for your constituents. If most of your constituents are on *Twitter*, *LinkedIn*, or *Facebook*, develop your accounts there and then perhaps consider whether you can finally close your *Myspace* or *Google+* account.
5. Provide fundraisers the key social media accounts that can help them to get to know and connect with prospects.
6. Create a constituent query and filter records by social media service. For example, you can create a filtered list of just prospects with a *Twitter* account and provide it to the person in your organization who's in charge of updating and growing your organization's social media accounts. A list of constituents who care about your organization and a link to their related account can grow your network and influence much more quickly than organic, word of mouth growth.

Social Media Biography Details

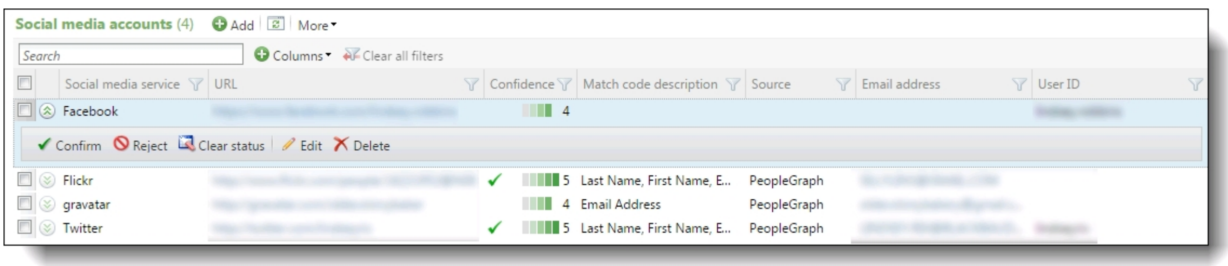
Based on the data *PeopleGraph* finds, we provide a Social Media Summary for your prospect. To review the information, from the Social Summary tab of a wealth and ratings record, click **Review details**.

The information for the social media biography summary fields are based upon the social media accounts returned by *PeopleGraph*. If the location, occupation, company, name, or gender fields are inaccurate or incomplete, you can update the information. For example, *PeopleGraph* may populate the gender field with "Unknown" based on the social media data it finds, however you likely know and can update that information.

To show you how *PeopleGraph* found the location, occupation, and company, we provide a details section with the information found for each email address sent to *PeopleGraph*.

Social Media Accounts

On the wealth and ratings record, Social Summary tab, the Social media accounts section enables you to track your prospect's profiles on social media services.



Helpful Tips

- Only manually added and confirmed social media accounts appear as icons below the profile picture on the wealth and ratings record or on the contact information tile of a constituent record.
- The links in the list are clickable. For example, click a social media service link in the **URL** column to open the social media account in a new browser tab.

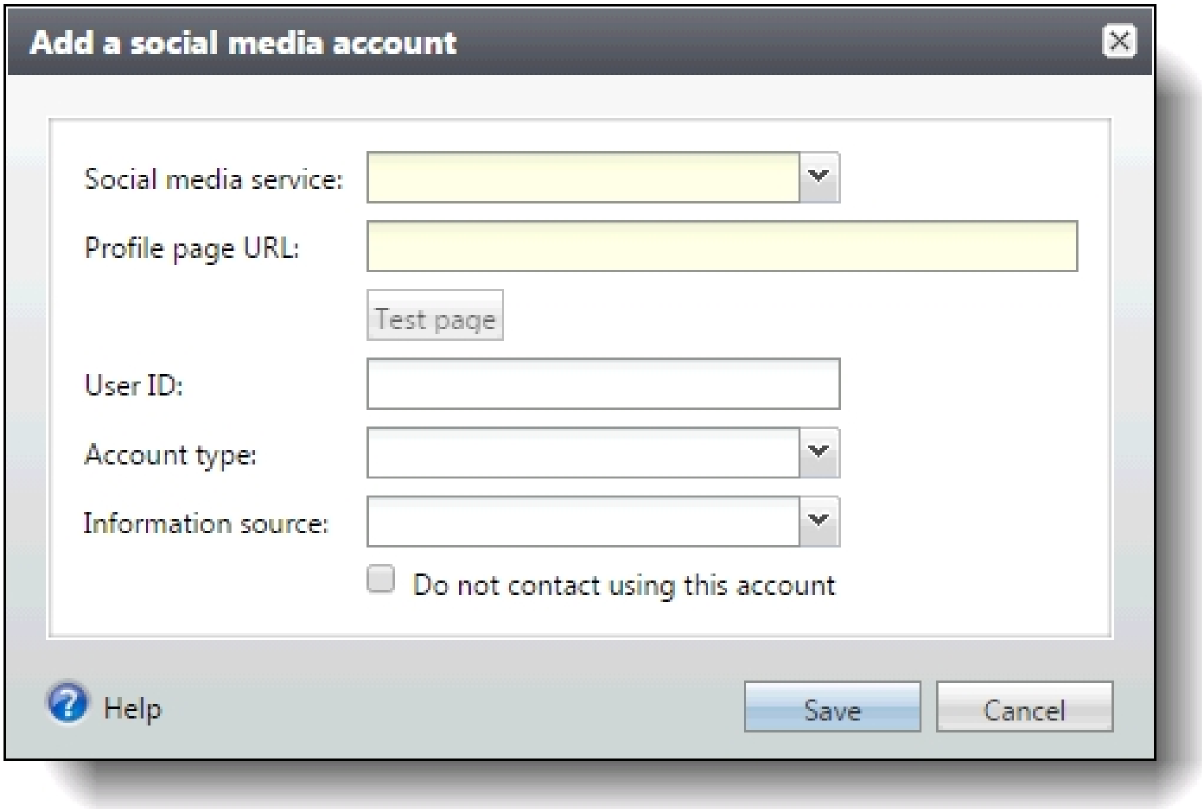
  Tip: *Facebook* and other account links work better if you log in to *Facebook* first. We recommend you log in to *Facebook* before you click social media icons or URLs on a wealth and ratings record.

- To confirm the social media account is your prospect's, use the URL and match code description to determine if the data from *PeopleGraph* is accurate.
- To remove the confirmed or rejected status from a social media account, click the double arrows for the record's row in the list and click **Clear status**.

Add or Edit a Social Media Account

To add a new account, from the Social Summary tab of a wealth and ratings record, in the **Social media accounts** section, click **Add**.

To edit an existing account, from the Social Summary tab of a wealth and ratings record, in the **Social media accounts** section, click the down arrows for the account you want to update, and click **Edit**.



Tip: Accounts added through the constituent record, Contact tab are automatically added to the wealth and ratings record, Social Summary tab, and vice versa.

How to update social media account information

1. Select the social media service for the account. If the service you want doesn't appear in the dropdown, you need to add it in *Prospects*, **Configuration** first.
2. For *Twitter*, enter in the prospect's *Twitter* account name. For all other services, enter the full URL to the prospect's social media account.
3. Enter in the User ID for the social media service. Often, the ID is a portion of the account's URL. For example, if the *Facebook* URL for Mark Zuckerberg is https://www.facebook.com/zuck, the portion of the URL that is his ID is "zuck."

   For some social media services, the User ID will auto populate based on the URL.

4. If known, select the account type and information source. You can add new account types and information sources on the fly. If this record is for information purposes and the prospect requests not to be contacted through the social media service, select the checkbox.
5. Before you navigate away, we recommend you test the account's link. Click **Test page**. A new browser tab appears for you to confirm the link works and the profile matches your prospect.
6. Click **Save**. You return to the wealth and ratings record.

   If you edit information for an account that returned from a wealth screening, your edits are not overwritten the next time you run a wealth screening.

Prospect Research Report

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

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

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

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

Export a prospect research report to an outside application

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

Constituent History

From the constituent record, you can view an audit of the changes made to the record. From a constituent, click the **History** tab.

Under **History**, you can view the changes and revisions made to the constituent record. For each change, you can view the date and time of the change, the action performed, the field affected, the field values before and after the action, and the user or process that performed the change. In the **Application** column, you can also view the application from which the change was made. For changes made through regular use of the program, “Blackbaud App Server” appears. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

To help find a specific change, you can filter the history information that appears. On the action bar, select the criteria of the information to view, and click **Apply**. You can select to view historical information by a specific user and of a specific action. In the **Show** field, you can select to view changes made during a specific time frame, such as Last 30 days, Last 6 months, or Last year. If you select "Specific date range", enter the time period in the **Start date** and **End date** fields. To remove the selected filters and display all history information, click **Reset** on the action bar.

You can also go to the **Origin** tab to see information about where this constituent record came from—whether it was through a direct marketing acquisition list or from a volunteer fair, for example.

Constituent Origin

Constituent origin information tracks the source for the constituent record. If a constituent comes to your organization to be a volunteer, you might assign the constituent a source of Volunteer. If a constituent is added at the same time revenue is added (a new constituent gives a donation, for example) or if a constituent has no source information and revenue is added (an existing constituent with no revenue history gives a donation, for example), a default constituent source code may be assigned which is tied to the revenue.

To view or edit constituent origin information from a constituent, click **History** under **More information**. On the Origin tab, click **Edit**. You can edit or select a constituent source. The date the record was added is not editable.

Origination information is also available in *Query* so you can analyze your data and measure how effective your constituent sources are.

Find External Properties and Businesses

Find External Properties and Businesses enables researchers to identify important data on prospects even when only incomplete information is available. For example, a prospect may own vacation property that for a number of reasons is not showing up during the *WealthPoint* search. With Find External Properties and Businesses, the researcher can search specifically for real estate and businesses based on limited criteria.

Tip: For the majority of searches, we recommend the more robust Target Analytics external prospecting database search. From the Search page, click **Show advanced search**. On the Advanced search screen, you can enter business and real estate criteria like you can from the Find External Properties and Businesses search.

If you do use the External Properties and Businesses search, this tool takes the submitted criteria and matches it to CoreLogic data for real estate information or to Dun & Bradstreet data for business ownership information. The results display on the Find External Properties and Businesses page.

In the search results, when you click the property address link for a real estate search result or a business ownership search result, a details page appears with more information.

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

If the information you find is helpful, you can add the data to an existing or new constituent. On the constituent record, the new data (real estate or business ownership record) will have a match code of EPB - External properties and businesses. Also, the confidence rating defaults to a 5, but it can be changed if you edit your confidence settings in *Prospects* Configuration.

Search Criteria Tips

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

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

By default, **Find External Properties and Businesses** matches search fields exactly. For example, if you enter “Jo” in the **First name** field, the search looks for first names spelled “Jo.” It does not consider Joe, or Joseph, or John as would the search functionality in other areas of the application.

You can, however, use the * wildcard character when you are unsure of exact spelling. For example, you can enter “Jo*” or “Joh*” in the **First name** field and expect the search to include Joe/Joseph or John. In the address fields, use the * to designate a “like” statement. For example, 211* returns 211 San Remo Circle, 2110 San Remo Circle, 211 Main Street, 2110 First Street, and so on. 21*1* returns 211 Park Ave., 21541 Second Street, 2101 Water Street, and so on.

Warning: Searching with wildcards may result in longer processing time.

How the Field Matching Logic Works

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

The search first queries all records that match all fields sent in the search.

Then, based on a field ranking system, the search attempts to partially match records by dropping a field from the search that it considers least helpful in getting the best record back.

Field Ranking Order for Real Estate Search Results

1. Address
2. ZIP
3. City
4. State
5. Last Name
6. First Name/Nickname
7. Company Name

- If information is entered in this field, and a Last Name and/or First Name/Nickname is also entered the application uses the company name in only the Business Ownership search.
- If information is entered in this field, and no Last Name or First Name/Nickname is entered, the Company Name is also used to search against the Last name field in the Real Estate portion of the search.

8. Unit (used in real estate searches only)

Field Ranking Order for Business Search Results

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

numbers, but you do not know the three middle numbers, you can enter "843***1000" in your search.

Field Matching Logic

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

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

Real estate searches

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

Business ownership searches

1. Last Name
2. First Name/Nickname
3. Company Name
    - If information is entered in this field, and a Last Name and/or First Name/Nickname is also entered the application uses the company name in only the Business Ownership search.
    - If information is entered in this field, and no Last Name or First Name/Nickname is entered, the Company Name is also used to search against the Last name field in the Real Estate portion of the search.
4. State
5. City
6. ZIP
7. Address
8. Phone number (used in business ownership searches only)
    - **Three characters or less**: the number is assumed to be an area code, and the system attempts to match against area code. For one or two characters, a * wildcard is assumed.

1. **Four to seven characters**: the number is assumed to be the main phone number (not the area code). For between four and six characters, a * wildcard is assumed.
2. **Greater than seven characters**: first three numbers are assumed to be the area code, with the remaining numbers used to match against the main phone number. For example if you enter nine numbers, the first three are broken out as the area code and the next six are used to create the rest of the phone number with a wildcard in the seventh slot (123456789 = (123) 456-789*).
3. **If numbers are entered within parenthesis ( )**: the system assumes these numbers are the area code. So with a (123)456 entry, even though it contains six numbers, the system identifies 123 as the area code and 456 as the first three digits of the main phone number.
4. **Area code and next three numbers or area code and last four numbers**: Wild card characters can be used in place of the unknown numbers. For example, if you know the area code and the next three numbers, but you do not know the remaining four numbers, you can enter “843765****” in your search. If you know the area code and the last four numbers, but you do not know the three middle numbers, you can enter “843***1000” in your search.

Execute a "Find External Properties and Businesses" Search

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

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

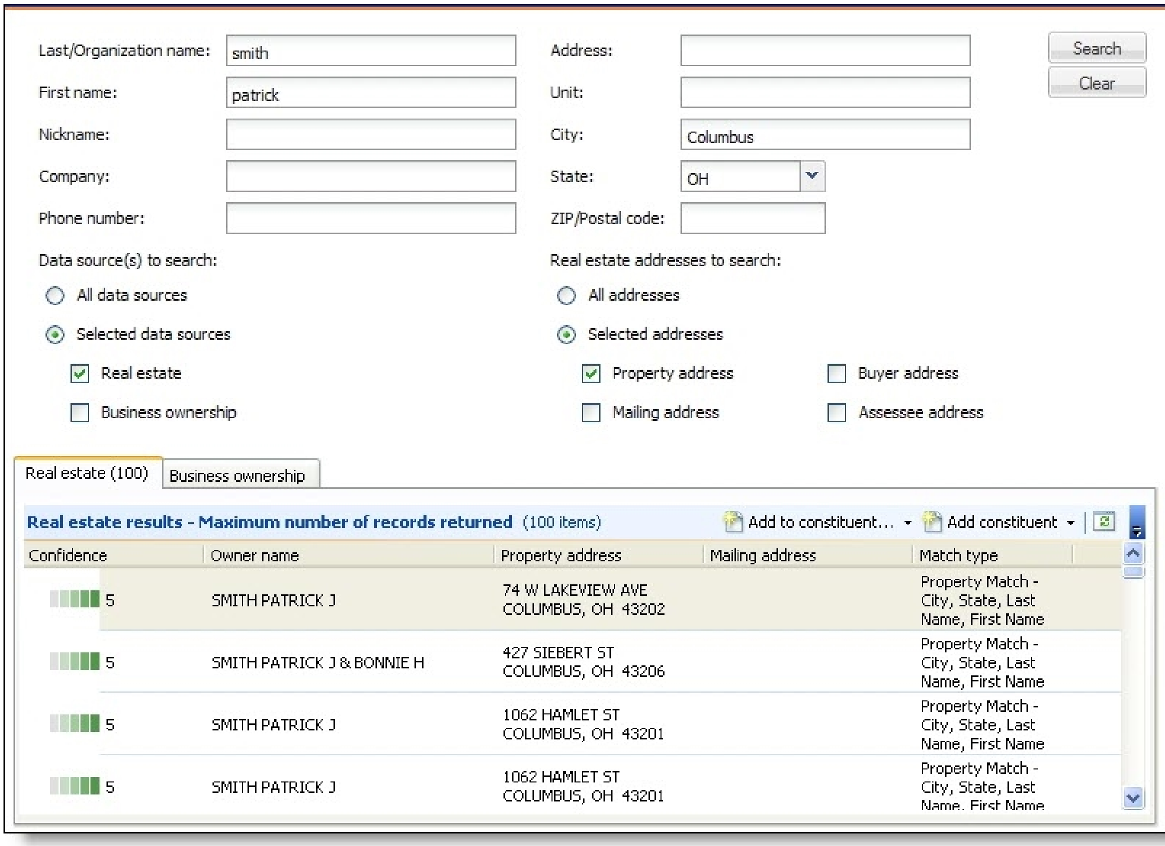
Search for prospect wealth information using the quick search option

1. From the Prospects page, click **Find External Properties and Businesses**. The Find External Properties and Businesses page appears.
2. The quick search allows you to enter any combination of fields.

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

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

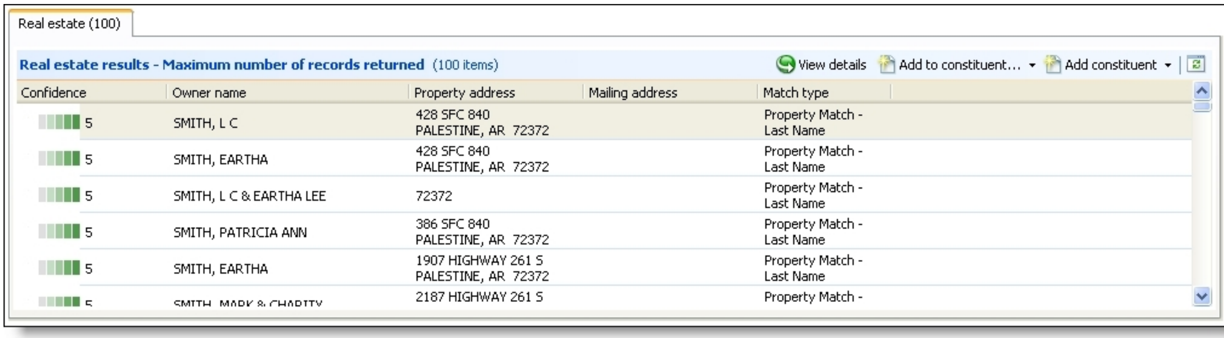
5. Click **Search**.



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

Real Estate Tab

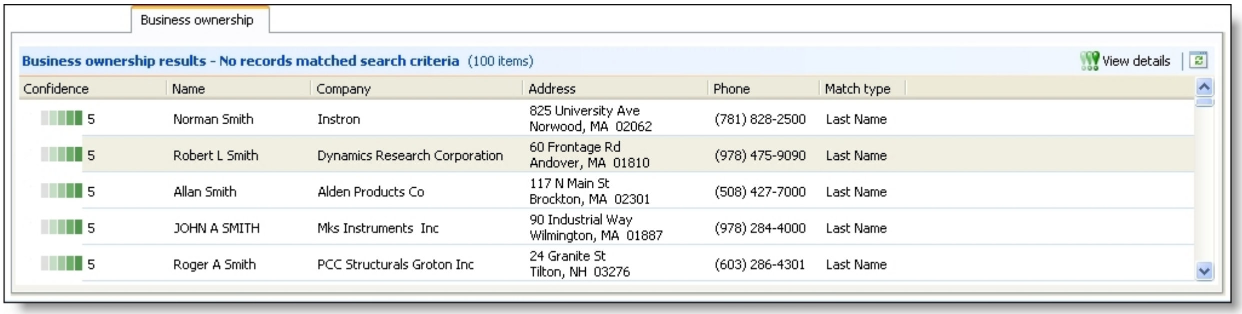
After you execute a Find External Properties and Businesses search, the search results are arranged in tabs, displaying data related to a specific data source. This section details the Real estate tab.



- To view additional information, select the record in the grid for which you want to view details and click **View details**. The search details page appears. For more information about this page, see Real Estate Property Details on page 261.
- If you want to add the selected results to an existing constituent record in your database, click **Add to constituent**. The button is available on both the search details page and the Real estate tab on the Find External Properties and Businesses page.
  - From the drop-down menu on the Add to constituent button, select what you want added to the constituent:
  - **Real Estate Record** creates a real estate record in the selected constituent record. All data located in the search is included in the new real estate record.
  - **Property Address** adds the information included in the **Property address** column of the Real estate tab to the prospect's constituent record.
- **Mailing Address** adds the information included in the **Mailing address** column of the Real estate tab to the prospect's constituent record.
- An Add screen for the selected option appears. From here, click the **Search** icon to search for and select the constituent to which you want to add this information.
- After you select the constituent, you return to the Add screen. The selected constituent's name now displays in the **Constituent** field.
- Click **Save**.
  - If you selected **Real estate record**, the system runs a duplicate check before adding the information to the record. If no duplicates are located, the information is added, and you return to the Find External Properties and Businesses page. If a duplicate is located, the Duplicate Search screen appears. From here, click **Select** to update the existing record with the new information; click **Ignore** to add the new information even as a potential duplicate; click **Cancel** to not add the information.
  - If you select **Property address** or **Mailing address** the Add an address screen appears. For information about the items included on this screen, see the *Prospects Guide*.
- If you want to add the selected result as a constituent record in your database, click **Add constituent**. Then select if you want the result added **From owner/property address** or the **From owner/mailing address**. The Select constituent names to add screen appears. For information about this screen, see Add a new constituent to your database from the search details page. Start at step 2.

Business Ownership Tab

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



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

- To view additional information, select the record in the grid for which you want to view details and click **View details**. The details page appears. For more information about this page, see Business Ownership Details on page 265.
- If you want to add the selected results to an existing constituent record in your database, click **Add to constituent** and select either **Business ownership record** or **Company address**.
  - An Add screen appears. From here, click the **Search** icon to search for and select the constituent to which you want to add this information.
  - Click **Save**.
    - If you selected **Business ownership record**, the system adds the business ownership record to the selected constituent. To view the added record, open the selected constituent, and from the Wealth and Ratings page, in the **Wealth summary** section, click **Business ownership**. The constituent's business ownership page appears with the new record.
    - If you selected **Company address** the Add an address screen appears. The selected address information defaults. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects Guide*. When you are done entering information to this screen, click **Save** to add the record to your database.

Real Estate Property Details

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

If you decide the information is helpful, you can add the information to an existing constituent or a new constituent record.

To add to an existing constituent, click **Add to constituent**. Before you select which constituent this information applies to, you need to select which part of the real estate search result you want to add.

Real estate record adds the entire search result or you can select a part of the result like the property address.

To create a new constituent from the search result, click **Add constituent**. Before you see the constituent names and relationship screen, you can select which part of the search result you want to create the constituent from.

- If you select "owner/property address" or "owner/mailing address," the owner information is pulled from the **Property address** section, **Owner** field. If both a property and a mailing address return, select which address is the constituent's primary address.
- If you select "assessee/assessee address," the constituent name and address information pulls from the **Assessee and buyer information** section, assessee fields.
- If you select "buyer/buyer address," the consituent name and address information pulls from the **Assessee and buyer information** section, buyer fields.

Review the information on the External Property Details page before you add the constituent. If the prospect you want to add is listed in one part of the property details but not another, your choice for which part of the search result to pull from will determine which names are available on the Select constituent names to add screen.

Once you fill out the names and relationship fields, you continue to the Add an individual screen. This is your standard add individual screen where we recommend you fill in as much information about the prospect as you can.

Tip: The more information you add in before you complete a full WealthPoint screening, the more data we can return for you. In our Target Analytics database, we can match on more than a first and last name. When you provide more prospect biographical information, we have the opportunity to match data on more fields!

When you click **Save**, the new wealth and ratings record appears for your constituent. If you want to do more with the real estate search result, click the browser's back button. You can return to the External Property Details page or if you click the back button again, you can return to the search results.

Add Information to Constituent from External Property and Businesses Details page

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

Add information to an existing constituent from the search details page

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

return to the Find External Properties and Businesses page.

If a duplicate is located, the Duplicate Search screen appears. From here, click **Select** to update the existing record with the new information; click **Ignore** to add the new information even as a potential duplicate; click **Cancel** to not add the information.

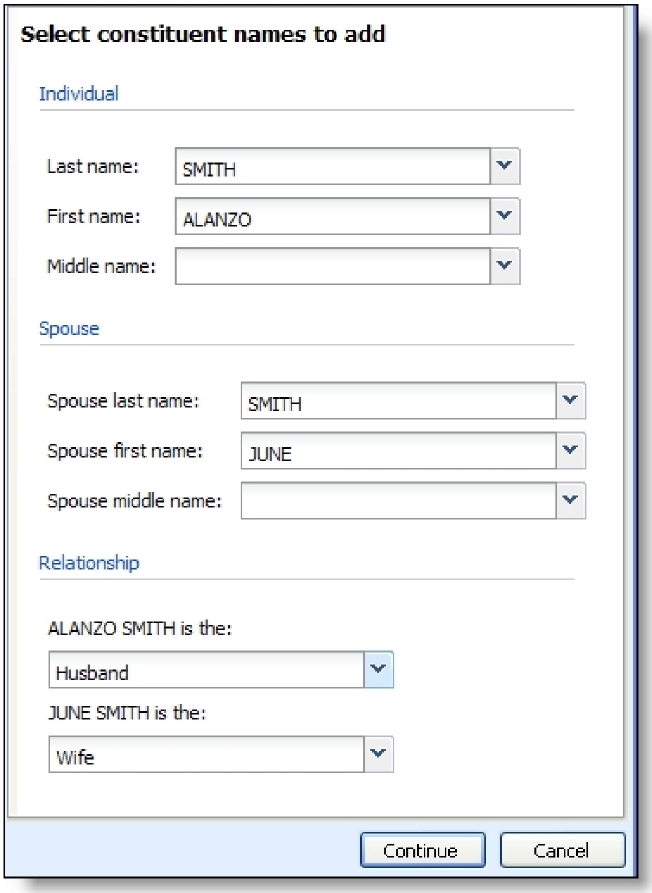
- If you select **Property address**, **Mailing address**, **Assessee address**, or **Buyer address** the Add an address screen appears. The selected address information defaults to the proper fields. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.

Add Constituent from Search Details Page

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

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

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



2. Select the **Last name**, **First name**, and if necessary **Middle name** you want to use in the constituent record. Your options default to the names included in the property summary. For example, if you select the assessee information with the assessee address and in the property summary two assessees are listed, both assessees' names appear as name options for the new constituent record. Select the name you want to use.
3. You can also select **Spouse** and **Relationship** information you want used in the record.
4. Click **Continue**. The Add an individual screen appears.

   Note: Add any additional information you want to include on this constituent record. For information about the items included on this screen, see the Contact Information section of the Constituent Records chapter in the *Prospects & Wealth Management Guide*.

5. The real estate asset is automatically added to the prospect record. If a spouse is included in the quick search results, the asset is not included on the spouse record. After the asset is added, the wealth capacity formulas are updated.
6. Click **Save**. The new constituent's Wealth and Ratings page appears. If you want to create additional constituent records based on other information included in the property summary, click **Back** to return to the search details page.

Business Ownership Details

The External Business Details page generated for Dun & Bradstreet searches displays all business ownership information located for a selected search result.

It enables you to review the information before you decide to take additional action. The data is arranged in a summary section at the top of the page and on three tabs: Matching executives, Biography information, and Ownership information.

If you decide the information is helpful, you can add the information to an existing constituent or a new constituent record. To add the search result to an existing constituent in your database, click **Add to constituent**.

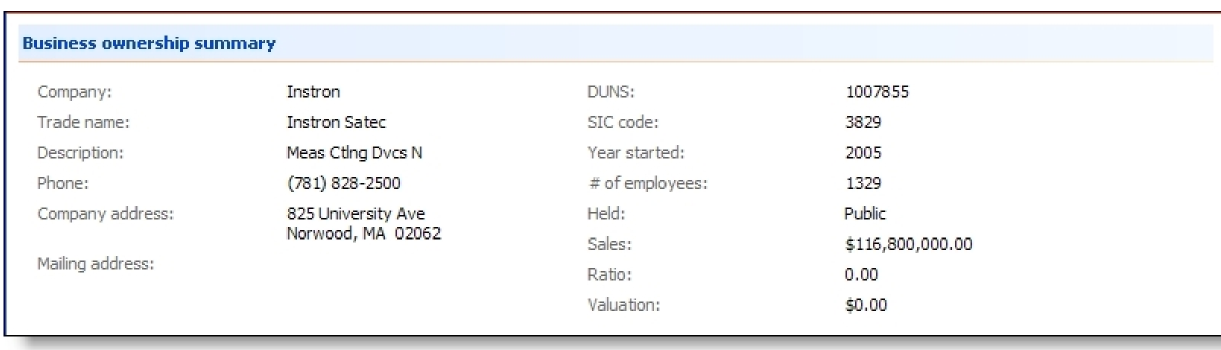
To add the search result to a new constituent, click **Add constituent**. Once you fill out the names and relationship fields, you continue to the Add an individual screen. This is your standard add individual screen where we recommend you fill in as much information about the prospect as you can.

> ***Tip:*** The more information you add in before you complete a full WealthPoint screening, the more data we can return for you. In our Target Analytics database, we can match on more than a first and last name. When you provide more prospect biographical information, we have the opportunity to match data on more fields!

When you click **Save**, the new wealth and ratings record appears for your constituent. If you want to do more with the business ownership search result, click the browser's back button. You can return to the External Business Details page or if you click the back button again, you can return to the search results.

Business Ownership Summary

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

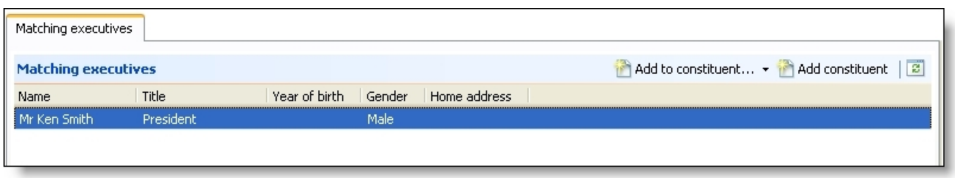


- Company name
- Trade name
- Short description
- Phone number
- Company address
- Mailing address

- DUNS number
- SIC code
- Year the business started
- Number of employees
- How the company is held
- Sales revenue
- Ratio
- Valuation

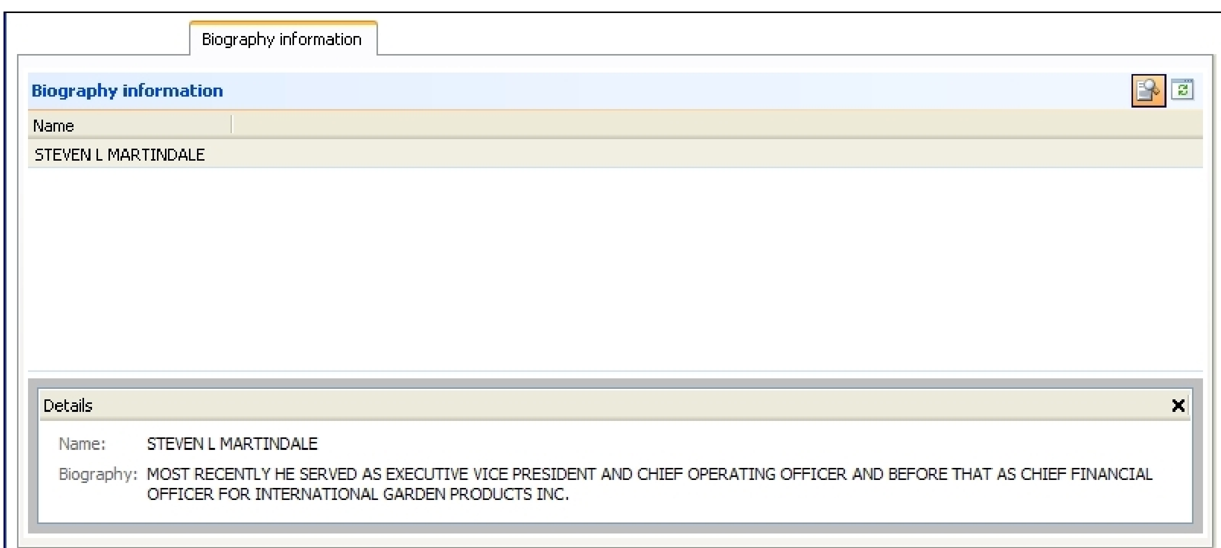
Matching Executives Tab

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



Biography Information Tab

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



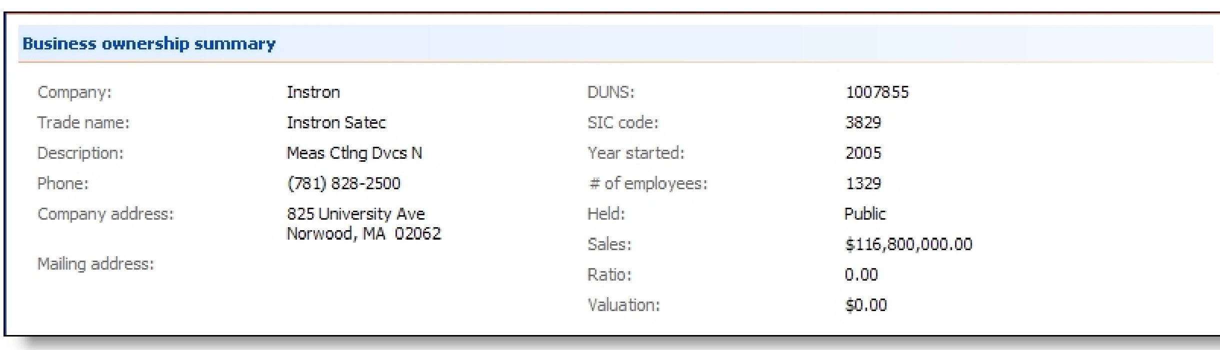
Ownership Information Tab

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

Business Ownership Summary Section

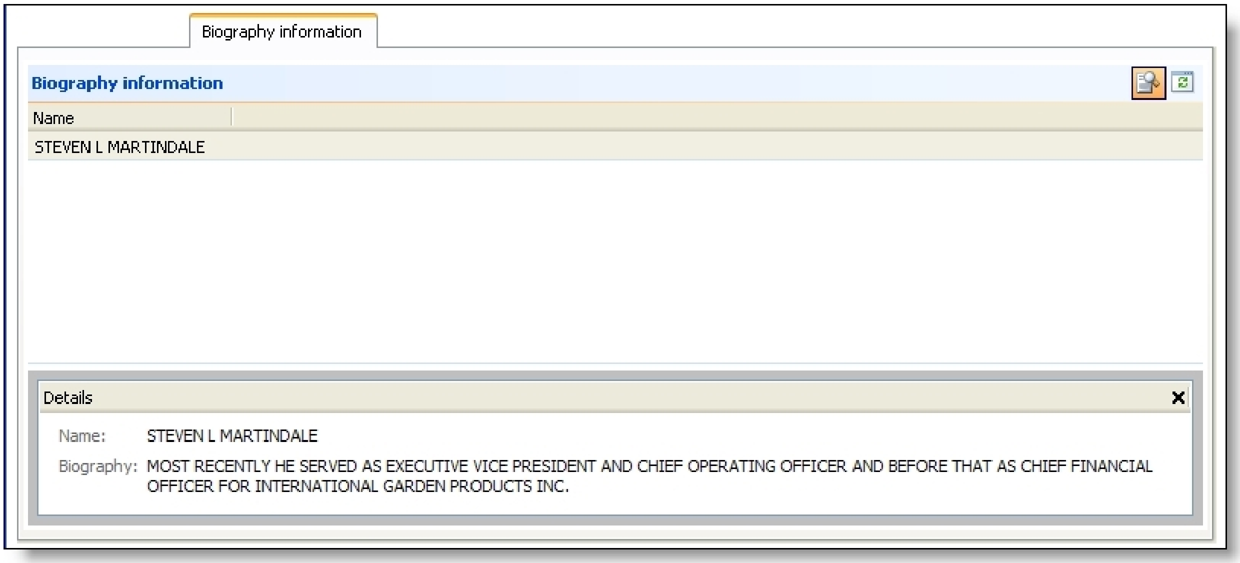
The **Business ownership summary** section displays at the top of the page and includes general information about the business, such as:

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



Biography Information Tab

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



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

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

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

Ownership Information Tab

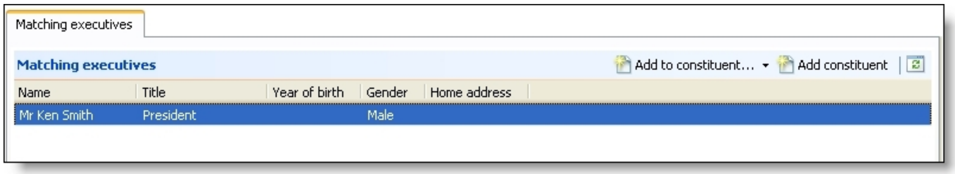
This tab displays each owner name associated with the company along with their ownership percentage and default ownership value.

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

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

Matching Executives Tab

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



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

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

Edit Number of External Properties and Businesses Saved

When you perform an External Properties and Businesses search, to help with speed, we save the search parameters and the summary data returned. By default the application saves the last 100 searches, stored on the Find External Properties and Businesses History page. If you want to change the default number, you can from the Find External Properties and Businesses page.

Change the number of External Properties and Businesses search saved

1. From the Prospects page, click **Find External Properties and Businesses**. The Find External Properties and Businesses page appears.
2. Under **Configuration**, click **Edit configuration**. The Edit configuration screen appears.
3. In the **Saved searches per user** field, enter the number of searches you want saved to the External Properties and Businesses History page.
4. Click **Save** to save your changes.

Edit External Properties and Businesses URL

If you need to change the database used to search for prospect wealth information, you can do so from the Find External Properties and Businesses page.

Change Find External Properties and Businesses database URL

1. From the Prospects page, click **Find External Properties and Businesses**. The Find External Properties and Businesses page appears.
2. Under **Configuration**, click **Edit External Properties and Businesses URL**. The Edit External Properties and Businesses URL screen appears.
3. In the **URL** field, enter the URL of the database you want used for wealth searches executed from the Find External Properties and Businesses page.
4. Click **Save** to save your changes.

Manage Contact Report Details

From the Contact Report page, you can manage information related to your interaction with the prospect, as well as certain details in the prospect plan.

To access a Contact Report, from the Details tab of a prospect plan select a completed step that includes a contact report. Click **Go to contact report** to view the report page.

Edit Contact Reports

From the Contact Report page, you can update details about the interaction.

Edit a contact report

1. From the contact report, click **Edit contact report** under **Tasks**. The Edit a contact report screen appears.
2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.
5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.
7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. In the **Next step** fields, you can update the information for the next scheduled step in the major giving plan based on the information you gathered from this interaction.
12. Click **Save**. You return to the Contact Report page.

Edit a contact report

1. From the contact report, click **Edit contact report** under **Tasks**. The Edit a contact report screen appears.
2. In the **Objective** field, enter the purpose of the interaction.
3. In the **Owner** field, select the fundraiser who completed the step.
4. In the **Actual date** field, enter the date the interaction between the fundraiser and the prospect occurred.
5. In the **Stage** field, select at which stage in the plan process the interaction occurred.
6. In the **Contact Method** field, select the type of interaction that occurred with the prospect.
7. In the **Category** and **Subcategory** fields, you can further define the type of contact method used.
8. In the **Additional solicitors** grid, enter each fundraiser who participated in the interaction.
9. In the **Participants** grid, enter each participant involved in the interaction.
10. In the **Comment** field, enter details about the interaction.
11. In the **Next step** fields, you can update the information for the next scheduled step in the major giving plan based on the information you gathered from this interaction.
12. Click **Save**. You return to the Contact Report page.

Contact Report Details

From the Details tab, you can capture information about the interaction and further customize the prospect plan in response to the details you learn about the prospect. In the **Comment** section, you can update details about the interaction. In the **Next step and progress summary** section, you can review the next pending step in the plan. If no pending steps exist, the next planned step appears. From this section, you can go to the step page, update information for the step, or review and edit all steps in the plan. If, as a result of the contact, you identify a new opportunity for the prospect, you can add the opportunity or update the details for opportunities currently linked to the major giving plan from the **Opportunities** section. If you discover that the prospect has an interest in supporting specific activities, pursuits, or associations, you can enter these in the **Funding interests** section. If the purpose of the plan changes based on the information you gather from your interaction with the prospect, you can update the plan's objective in the **Plan narrative** section.

- Contact Reports on page 129
- Edit a Pending Step on page 128
- Add Opportunity
- Edit an Opportunity on page 318
- Funding Interests on page 292
- Edit Narrative on page 314

Manage Prospects

The prospect is composed of tabs and links. Each tab and link tracks prospect information: plans your organization intend to use to win a donation, wealth information, ratings data, planned gifts, and interactions. You can add, edit, and delete information from these tabs and links.

You can also access other areas of the program that contain information about the prospect, such as the prospect's constituent and gift information.

View Prospects

You can access the Prospect page from multiple locations in *Prospects* and other modules.

- From the *Prospects* drop-down arrow:
- Select **Search**. The Search screen appears.
- Enter your search criteria.
- Click **Search**. All possible matches appear in the **Results** grid.
- Select the prospect you want to view.
- Click **Select**. The record opens.
- From *Constituents*, if the selected constituent also is a prospect for your organization:

- A **Major giving prospect** link appears in the **View as** frame on the left side of the constituent screen.
- Click the link to view the constituent's Prospect page.

Note: For more information about constituents, see the *Constituents Guide*.

- From *Volunteers*, if the volunteer is also a prospect for your organization:
- A **Major giving prospect** link appears in the **View as** frame on the left side of the volunteer screen.
- Click the link to view the volunteer's Prospect page.

Note: For more information, see the *Volunteers Guide*.

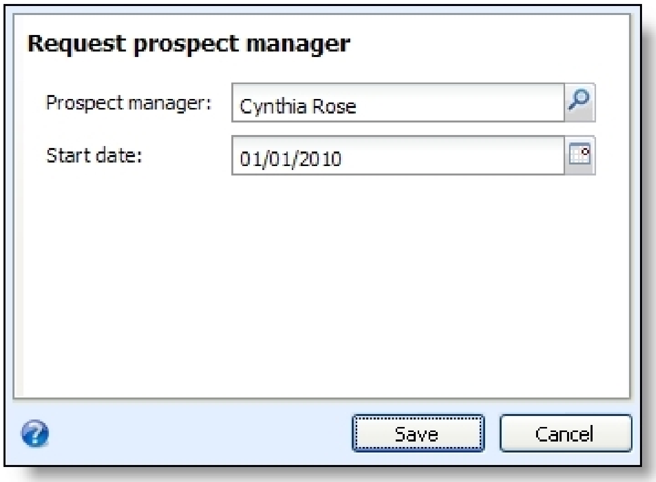
For more information about the prospect tabs, see Manage Prospects on page 273.

Edit Prospect Status

To change the prospect status from the Prospect tab on the prospect record, click **Edit prospect status**on the Prospect Summary subtab. The Edit prospect status screen appears, allowing you to make changes.

Request Prospect Manager

From a prospect record, you can request a prospect manager assignment for the prospect. Under **Tasks**, click **Request prospect manager**. From the Request prospect manager screen, select the manager you want to request and enter a start date for the assignment.



Unlike the **Edit prospect manager** link, **Request prospect manager** does not immediately commit the assignment. Instead, the request is forwarded to the current prospect manager who must approve the request before the new assignment can take place.

For information about approving or denying a request, see Prospect Requests Tab on page 154.

Plans Tab

On the Plans tab of an individual prospect, you assign or create plans you intend to employ to cultivate and steward the selected prospect. For example, if your major giving manager created a plan composed of a series of specific steps to be used to cultivate major gifts, you can select the "Major Gifts" plan on the Plans tab, and assign it to the selected prospect. Any fundraiser that opens this prospect then knows how your organization intends to cultivate a major gift from the prospect. After assigned to a prospect, outlined plans can be edited to meet the prospect's specific needs.

The Plans tab displays the plans for the constituent as well as the plans which the constituent is a participant of. For example, a constituent who is a financial planner may be a participant on the plans of multiple other constituents. The plans for the other constituents appear on the Plans tab of the financial planner, in addition to any of his own plans.

Group Plans

If you work from a constituent group or household on the Prospect page, the Plans tab displays a **Group plans** grid listing all plans assigned the grouped prospect. From this grid, you can add and delete assigned plans, access plan records, and designate plans "Historical".

Note: A group constituent is composed of several constituents who pool funds and give jointly. For example, employees of an organization may be a donor group. Households are also groups but track the activities and giving of a everyone living under one roof, usually related individuals, such as a husband and wife. For more information, see the *Constituents* guide.

Household/Group Member Plans

If you work from a household or constituent group on the Prospect page, the Plans tab displays a **Household member plans** or **Group member plans** grid, based on the type of prospect. If any members of the group also have an individual prospect plan, this individual displays in the **Household member plans** or **Group member plans** grid. For example, if Dennis & Elizabeth Ashton, entered as a household group, have a planned giving plan assigned to them as a group, this plan displays in the **Group plans** grid on the Plans tab. If Dennis also has a plan assigned to him individually for “Board recruitment”, this plan displays in the **Household member plans** grid on the Plans tab.

Note: If you attempt to delete a group member that is also a plan participant, the group member remains a plan participant and the associated participant role remains on his constituent record, but he is no longer a group member.

From the **Household member plans** or **Group member plans** grid, you can access the plan and prospect records.

Note: A group constituent is composed of several constituents who pool funds and give jointly. For example, employees of an organization may be a donor group. Households are also groups but track the activities and giving of a everyone living under one roof, usually related individuals, such as a husband and wife. For more information, see the *Constituents* guide.

Add a Prospect Plan

On the Plans tab of a prospect, you assign or create plans you intend to employ to cultivate the selected prospect.

Add plan to a prospect

1. From the prospect, select the Plans tab.
2. Click **Add**, **Add prospect plan**. The Add prospect plan screen appears.
3. On the Details tab enter information about the prospect plan.

   Tip: To make sure all data is entered properly when you use a plan outline, complete all fields on the Details tab and save your entries before you move to the Steps tab and select the outline.

4. Click **Save**. You return to the prospect record.

Details Tab Fields

Screen Item	Description
Plan name	Enter a name to identify the plan.
Site	If your organization supports several offices at various locations, select the site in which this plan is to take place. You create **Site** entries in **Site**, accessed from *Administration*. For more information, see the *Administration Guide*.
Plan type and **Start date**	Select or enter the type of plan you want to create. For example, if you intend to cultivate this prospect for a major gift, select or enter "Major gift." You can also enter a start date for the prospect plan.
Primary manager	Click the binoculars. A search screen appears, and you can locate the primary manager you want to assign this prospect.
Secondary manager	Click the binoculars. A search screen appears, and you can locate the secondary manager you want to assign this prospect.
Start date/End date	If the plan length is known, you can enter start and end dates defining the term.
Secondary solicitors/Role	Click the binoculars. A search screen appears, and you can locate the secondary solicitor you want to assign this prospect. You can assign as many solicitors as necessary in this grid. In the **Role** column, select the secondary solicitor's role: volunteer, trustee, president, etc.
Plan participants/Role	The **Plan participants** column identifies the constituent participants. Who displays in the drop-down menu depends on the type of prospect: • Constituent group: Lists members included in the group • Constituent household: Lists family members • Organization constituent: Lists contacts and relationships to the organization • Individual constituent: Lists related constituents The **Role** column identifies the plan participants role in the group. For example, "Decision Maker" or "Key influencer".
Narrative	Add any comments or notations.

Steps Tab Fields

Screen Item	Description
Add steps from plan outline	If on the Plan outline tab in **Major Giving Setup** you created an outline of the plan you want to implement for certain **Plan type**(s), click the **Add steps from plan outline** drop-down arrow and select the outline you want used for this prospect. The selected outline defaults in the grid. If no outlines exist in the program, the button is grayed out and reads **No plan outlines defined**.
Expected date	This is the date you expect to perform the step.
Expected start time	This is the time you expect to start work on the step.
Expected end time	This is the time you expect to complete work on the step.
Time zone	The time zone for the dates.
Objective	What you hope to accomplish during the planned step.
Owner	The individual responsible for executing the planned step. Click the binoculars to access the Search screen and locate the individual.
Stage	Where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
Status	Status of associated step: planned, pending, complete.
Actual date	If in the **Status** column you selected "Completed", enter the completion date. A date must be assigned to all "Completed" steps.
Contact method	How you intend to contact the prospect: email, phone call, meeting.
Category	Select a category to further define the contact method.
Subcategory	Select a subcategory to further define the contact method.
Additional solicitors	"Yes" = additional solicitors are assigned; blank = no additional solicitors assigned.
Participants	"Yes" = participants are assigned; blank = no participants assigned.
Update status	Select an updated status to apply to any selected row in the **Steps** grid.
Insert step	In the **Steps** grid, select the row beneath where you want to add an additional step and click **Insert step**. A blank row appears above the selected row.
Edit additional details	In the **Steps** grid, select the step you want to edit and click **Edit additional details**. The Edit a step screen appears, and you can make any necessary changes.
Adjust expected dates	To adjust **Expected date** entries, select the step or steps you want to change and click the plus and minus buttons to adjust the dates.

View Prospect Record

If you work from a group or household prospect, the Plans tab displays a **Group member plans** or **Household member plans** grid. If any members of the group or household also have an individual prospect plan, this individual displays in the grid. From this grid, you can easily access the individual's prospect record.

View a group/household member's individual prospect record

1. From the prospect, select the Plans tab. All plans associated with the prospect display.
2. In the **Household member plans** or **Group members plans** grid. select the individual you want to view and click **Go to prospect**. The selected prospect appears.
3. Make any necessary changes.
4. Click **Back** to save the individual prospect and return to the constituent group prospect.

Make Prospect Plan Historical

On the Plans tab of a prospect, you assign plans you intend to employ to cultivate the selected prospect. From this tab, you can also remove any plan no longer relevant if you designate the plan "Historical". This designation removes the plan from the Plans tab, but it does not delete the plan from your system.

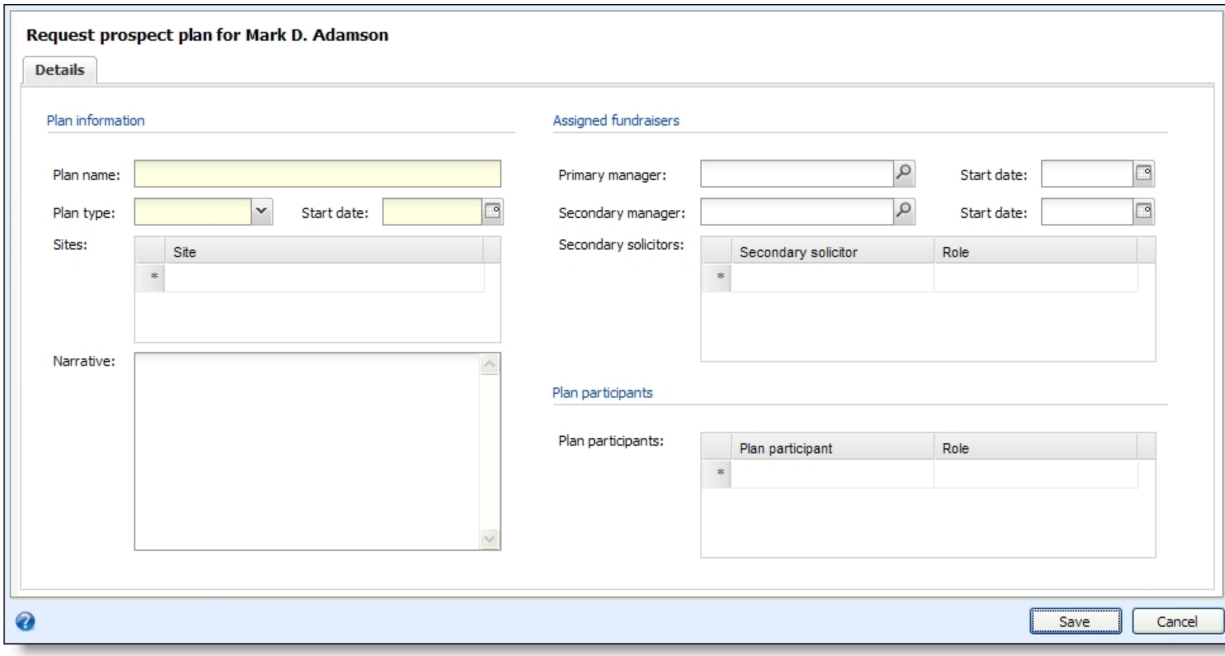
Warning: You cannot make a plan historical if steps associated with the plan have a status of planned or pending. Steps must either be completed, canceled, or declined. Similarly, you cannot make a plan historical if any opportunities associated with the plan have a status of qualified, unqualified, or response pending. Opportunities must either be accepted, canceled, or rejected.

Request a Major Giving Plan

On the Plans tab of a prospect, you can request a major giving plan for a prospect. When you make a request, a plan is not created. Instead, you request a plan for the prospect manager to approve or reject.

Request a major giving plan

1. From the prospect, select the Plans tab.
2. Click **Request major giving plan**. The Request prospect plan screen appears.



3. On the Details tab enter information about the prospect plan.

   When you make a request, you do not enter steps. You create steps after a plan has been approved.

4. Click **Save**. You return to the prospect record.

Prospect Team Tab

This tab contains any team members assigned to the prospect. You can assign team members when you add a prospect (Team tab). After the prospect record is created, you can add, edit, and delete team members from the Prospect Team tab. You can also view the team member's fundraiser record.

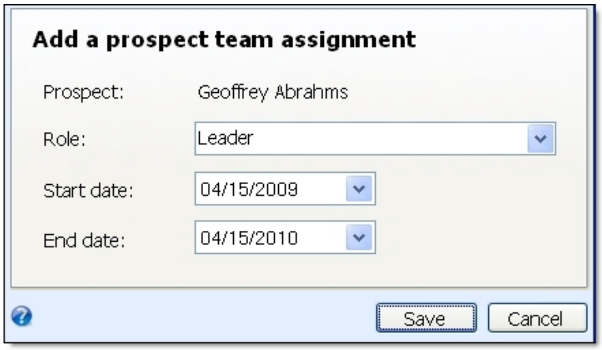
The **Prospect manager** section displays current prospect manager information. You can also view that prospect manager's fundraiser record. The **Prospect team** section displays Primary plan manager, Secondary plan manager, Secondary solicitors, Stewardship plan manager, Stewards, and user defined roles. From the filter, you can select to show prior team members.

Add Team Members

The Add team member screen allows you to search for and select a fundraiser you want to add as a team member to the prospect's record, select a role for the team member, and enter the date the fundraiser became a team member.

Add team member to prospect record

1. From the prospect record, select the Prospect Team tab.
2. Click **Add Team Member**. The Add team member screen appears.



3. On this screen enter details about the prospect team member.
4. Click **Save**. You return to the prospect record.

Add a Prospect Team Member Screen Fields

Field Name	Description
Team Member	Click the binoculars in this field. A search screen appears, and you can locate the fundraiser you want to assign as a team member to this prospect. This field is not active from the Edit a prospect team member screen.
Role	Enter the team member's role in working with this prospect: volunteer, trustee, influencer, etc.
Start Date/End Date	Enter the date on which this fundraiser became a team member. You can also enter the date on which the fundraiser is no longer a team member.

Edit Team Members

The Edit team member screen allows you to change the team members role, edit the start date, and add an end date for the fundraiser's association with the prospect.

Planned Gifts Tab

From the Planned Gifts tab you can create gift records to track your organization's planned giving. The records include information specific to numerous types of planned gift vehicles. You can record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of multiple beneficiaries and relationships for a planned gift. In addition, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets.

Note: If you have additions to planned gifts, the gifts and amounts are all displayed on the Planned Gifts tab. The first row is the total of the original planned gift and any additions. You can expand that summary row to see the original gift and the additions individually.

Planned Giving Summary

The summary section of the Planned Gifts tab displays pertinent information about planned gifts, and allows you to review planned gift information without opening the gift record.

Household Planned Gifts

If you are working from a constituent household on the Prospect page, the Planned Gifts tab displays a **Household planned gifts** grid listing all planned gifts assigned the household prospect. From this grid, you can add, edit, and delete planned gifts, and access existing planned gifts.

Household/Group Member Planned Gifts

If you are working from a constituent group or household on the Prospect page, the Planned Gifts tab displays a **Group member planned gifts** or **Household member planned gifts** grid. If any members of the group or household also have an individual prospect planned gift, this individual displays in the grid. For example, if the household of Dennis & Elizabeth Ashton have a household planned gift, this gift displays in the **Household planned gifts** grid on the Planned Gifts tab. If Dennis also has an individual planned gift, this gift displays in the **Household member planned gifts** grid.

From the **Group member planned gifts** and **Household member planned gifts** grid, you can access the planned gift and prospect record.

Add a Planned Gift

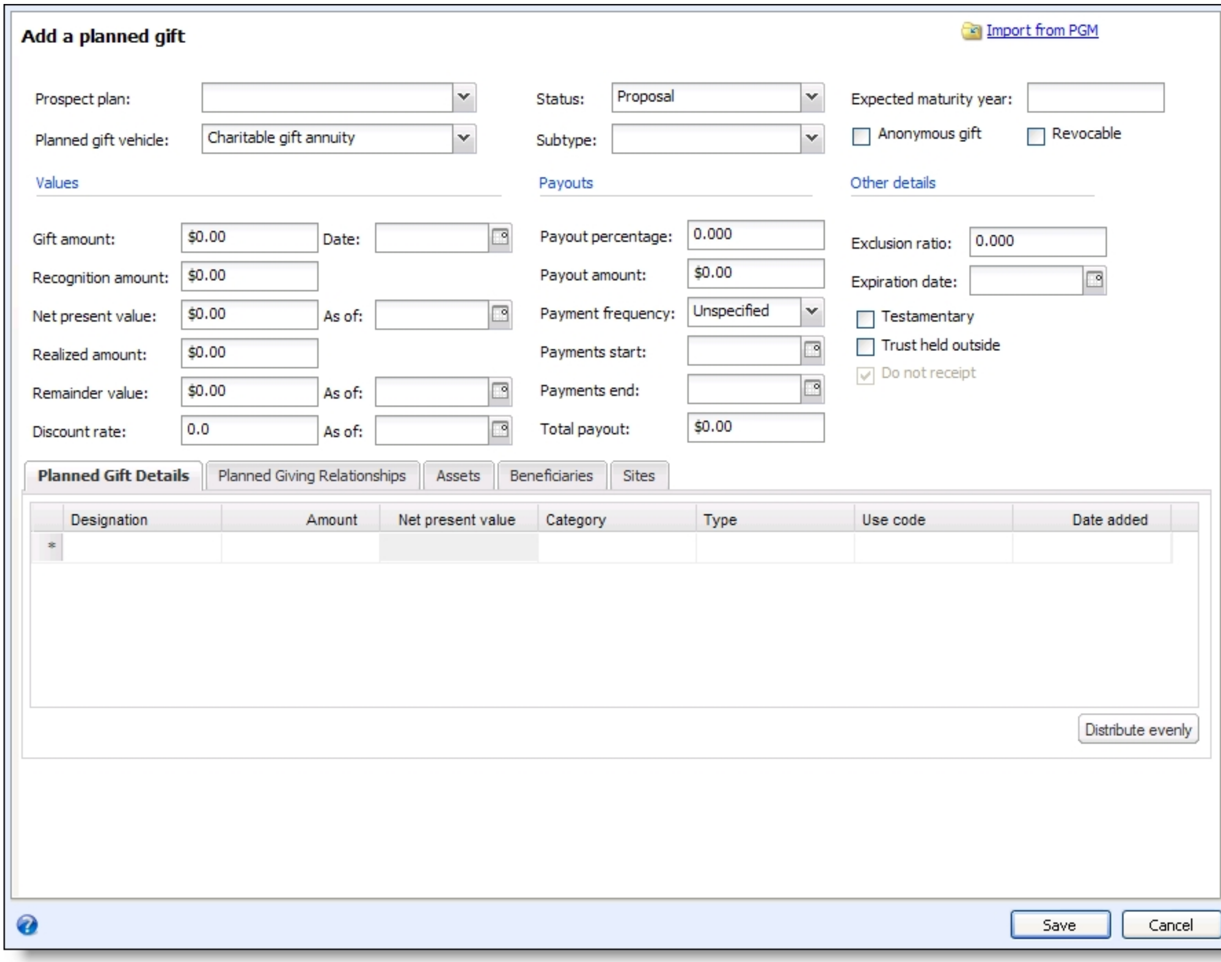
You can add a planned, or deferred, gift to a prospect from the Planned Gifts tab of the prospect's record.

Note: If you work from a group prospect, you cannot add a planned gift to the group. You can add planned gifts only to the group members. This information then appears under **Cumulative group member giving summary** and **Group member planned gifts**.

Rather than manually enter planned gift information, you can also import data from *PG Manager*, a PG Calc, Inc. product used by Planned Giving Offers to track planned gifts.

Add a planned gift

1. Access the record of the prospect for which to add a planned gift.
2. Select the Planned Gifts tab.
3. Under **Planned gifts**, click **Add** on the action bar. The Add planned gift screen appears.



4. To import planned gift information from *PG Manager*, click **Import from PGM** and browse to the file to import.
5. In the **Prospect plan** field, select the plan to which the planned gift applies.

> ***Warning:*** If you think this planned gift needs to be assigned to a prospect plan, assign it now. If you do not select a plan now, you will not be able to edit or add a prospect plan later. To edit or assign a prospect plan, you will need to set up a new planned gift.

6. In the **Expected maturity year** field, enter the estimated year of when the conditions of the planned gift will be met and the final balance of the gift allocated to its final recipient.
7. In the **Planned gift vehicle** field, select the type of planned gift to add.
8. After you select a planned gift vehicle, you can select the subtype of the vehicle. A Charitable gift annuity has three pre-defined vehicle subtypes: Deferred, Flexible, or Commuted Payment. You can create and manage vehicle subtypes for other vehicles from the Major Giving Setup page.
9. If the prospect requests to make the planned gift anonymously, select **Anonymous gift**.
10. If the prospect can revoke the planned gift, select **Revocable**. Planned gifts with the **Revocable** checkbox cleared are considered non-revocable. Planned gifts with a status of “revocable” may

appear in a different general ledger account than planned gifts with a “non-revocable” status. For information about how to setup your general ledger mapping for planned gifts, see the *Administration Guide*. For information about how to setup your general ledger mapping for planned gifts, see the *Administration* section of the help file.

For information about how to map revocable and non-revocable planned gifts see the *Administration Guide*.

> ***Note:*** You cannot edit the revocable or non-revocable status of a planned gift after it has been added as revenue. If you need to edit the status, you must remove the revenue, make the change, and add the revenue again. For information about how to remove the planned gift revenue, see the *Revenue Guide*.

11. Under **Values**, enter the total amount of the gift and the date the prospect offers it to your organization.
12. Enter any additional values to track such as recognition amount, net present value, and remainder value.
13. For a unitrust, trust, Charitable gift annuity, Pooled income fund, Bargain sale, or Outright gift, under **Payouts**, enter basic information about the projected payouts of the gift as necessary. For example, payouts for an annuity change on an annual basis.
14. For a vehicle of type Life insurance, under **Life insurance premium**, enter basic information about the life insurance policy’s premium and payments.
15. For a vehicle of type Pooled income fund, under **Pooled income fund**, enter basic information about the pooled income fund (PIF) and its units.
16. Under **Other details**, enter any additional information about the planned gift as necessary.

    If you configure planned gift receipts for specific vehicle types from the Major Giving Setup page, **Do not receipt** is enabled for planned gifts with those vehicle types. But if **Revocable** or **Trust held outside** are selected, **Do not receipt** is selected and disabled.
17. On the Planned Gift Details tab, enter information about the designations to which to apply the planned gift.
18. On the Planned Giving Relationships tab, select the prospect relationships associated with the planned gift, such as an attorney or a family member.
19. On the Assets tab, enter any information about the prospect’s assets associated with the planned gift, such as a house, an automobile, or stock.
20. For a planned gift vehicle with the potential to include beneficiary information, such as Life insurance, the Beneficiaries tab appears. Enter information about the beneficiaries associated with the planned gift.
21. To restrict use of the planned gift to specific sites at your organization, On the Sites tab, select the sites to access with the planned gift.
22. Click **Save** to save the planned gift. The record of the planned gift appears.

Add a Planned Gift Screen

The table below describes the items on the Add a planned gift screen. For information about how to access this screen, see Add a Planned Gift on page 282.

Screen Item	Description
Import for PGM	To import data from *PG Manager*, click this link and browse to the *PG Manager* file that contains the data to import.
Prospect plan	Select to which plan associated with the prospect the planned gift applies.
Status	Select the status of the planned gift, such as Proposal or Accepted.
Expected maturity year	Enter the year in which you estimate that all conditions for the planned gift will be met and the balance allocated to the final recipient. For example, this may be the year the last beneficiary is estimated to pass away, it may be based on a fixed time period, or it may be stated another way in accordance with the terms of the vehicle.
Planned gift vehicle	Select the type of a planned gift. The vehicle defines the way the gift conditions are structured, based on generally accepted legal instruments to transfer a planned gift to an organization. Gift vehicles may change as applicable tax laws are amended and new vehicles are devised by attorneys and financial planners. *See also*, Planned Gift Vehicle Types: Requirements to Add Planned Gifts as Revenue on page 288.
Subtype	After you select a planned gift vehicle, you can select the subtype of the vehicle. A Charitable gift annuity has three pre-defined vehicle subtypes: Deferred, Flexible, or Commuted Payment. You can create and manage vehicle subtypes for other vehicles from Major Giving Setup.
Anonymous gift	If the prospect requests to make the planned gift anonymously, select this checkbox.
Revocable	If the prospect can revoke the planned gift, select this checkbox. Planned gifts with the Revocable checkbox cleared are considered non-revocable. Planned gifts with a status of "revocable" may appear in a different general ledger account than planned gifts with a "non-revocable" status. For information about how to map revocable and non-revocable planned gifts see the *Administration Guide*.
Gift amount and **Date**	Enter the total amount of the planned gift and date the prospect offers it.
Recognition amount	Enter the recognition amount of the planned gift as necessary.
Net present value and **As of**	Enter the net present value of the planned gift, or the value of the gift on the date it matures, and the date to which the net present value applies.
Realized amount	Enter the amount of the planned gift after it has been settled and distributed.
Remainderman %	For a unitrust, trust, or vehicle of type Life insurance, Retained life estate, Bequest, Retirement plan assets, or Other, this field appears. Enter the percentage of the property due the person or institution that inherits the property.

Screen Item	Description
Remainder value and **As of**	Enter the expected income amount for your organization once all the conditions for the planned gift are met and the date to which the remainder value applies.
Discount rate and **As of**	For a unitrust, trust, Other, or vehicle type of Charitable gift annuity, Pooled income fund, or Retained life estate, this field appears. Enter the current discount rate for planned gifts, as obtained from the Internal Revenue Service (IRS), along with the date.
Probate status and **As of**	For a Bequest, Retirement plan assets, or a vehicle of type Other, this field appears. Select the status of the planned gift in the probate court and the date to which the status applies.
Payout percentage	To track the payout as a percentage of the planned gift amount, enter the percentage to use.
Payout amount	To track the payout as the amount paid of the planned gift, enter the amount to use. For example, for a fixed-payment gift, enter a full year’s payout amount.
Payment frequency	Select how often a payout is made, such as Annually or Quarterly.
Payments start and **Payments end**	Select the dates of the first and final payouts.
Total payout	Enter the total amount paid of the planned gift.
Life insurance premium	Prospects may donate life insurance policies to your organization, such as policies that no longer fits the needs of their families. For a planned gift vehicle of Life insurance, enter information about the policy, such as its premium amount and payment frequency and due date.
Pooled income fund	A Pooled Income Fund (PIF) collects gifts from several donors into one fund, with each donor assigned a number of units based on the proportion of the PIF’s total amount that the donor’s gifts represent. On a quarterly schedule, investment earnings from the PIF are paid proportionally to the designated beneficiaries of each of the donors, based on the number of units. When prospects donate PIF units to your organization, your organization receives the donor’s proportional share of the current total of the PIF when the last designated beneficiary for the donor’s gift passes away. For a planned gift vehicle of Pooled income fund, enter information about the PIF and its units donated to your organization.
Term type	For a unitrust, trust, Other, or Retained life estate, this field appears. Select the type of term assigned to the planned gift, such as Fixed term or Lives only.
Term end date	For a unitrust, trust, Other, or vehicle of type Retained life estate this field appears. Select the end date of the term assigned to the planned gift.
Years in term	For a unitrust, trust, or Retained life estate, this field appears. Enter the number of years of the term assigned to the planned gift.
Tax ID number	For a unitrust, trust, or Other, this field appears. Enter the tax ID number of the planned gift vehicle.

Screen Item	Description
Exclusion ratio	For a Charitable gift annuity, this field appears. Enter the ratio to determine which portion of the annuity is taxable. The exclusion ratio represents the percentage of each annuity payment that is considered a recovery of principal and, therefore, excluded from the annuitant's gross income. It is calculated by dividing the investment in the contract (the present value of annuity) by the adjusted expected return.
Expiration date	For a Charitable gift annuity, this field appears. Select the end date for the exclusion ratio.
Testamentary	For a unitrust, trust, Other, or Charitable gift annuity, this checkbox appears. Select whether the planned gift is testamentary, or arises upon the death of the testator and is specified in his will. Testamentary trusts are distinguished from *inter vivos* trusts, which are created during the settler’s lifetime.
Gift value is nominal	For a vehicle type where the ultimate amount of the proceeds are unknown, such as a Charitable remainder unitrust, Bequest, Other, or Retirement plan assets, this checkbox appears. Select whether the value of the planned gift is a projected, or nominal, value.
Gift is contingent	For a unitrust, trust, or vehicle of type Bequest, Retirement plan assets, or Other, this checkbox appears. Select whether the planned gift is contingent upon conditions in the supporting legal documents.
Trust held outside	For a unitrust or trust, this field appears. This field also appears for vehicles of type Other and Charitable gift annuity. Select whether the planned gift vehicle is held outside.
Do not receipt	If you configure planned gift receipts for specific vehicle types from the Major Giving Setup page, **Do not receipt** is enabled for planned gifts with those vehicle types. But if **Revocable** or **Trust held outside** are selected, **Do not receipt** is selected and disabled.
Organization is beneficiary	For a vehicle of type Life insurance, this checkbox appears. Select whether your organization is a beneficiary of the life insurance policy.
Organization owns policy	For a vehicle of type Life insurance, this checkbox appears. Select whether your organization owns the life insurance policy.
Living Trust	For a bequest, this checkbox appears. For a bequest when the gift is held in a legal trust, select whether the trust is a living trust, or an *inter vivos* trust, which is created while the donor is alive.
FLIP situation	For a Charitable remainder annuity trust and charitable remainder unitrust, this checkbox appears. Select whether this annuity trust or unitrust is a flip to a standard unitrust. A flip occurs when a specific event or date occurs. If a flip occurs, select the checkbox and then select the trigger event and date.
Trigger event and **Trigger date**	For a charitable remainder unitrust and charitable remainder annuity trust, you can select a trigger event for the trust and enter a date.

For information about the tabs on this screen, see:

- Planned Gift Details Tab on page 288
- Planned Giving Relationships Tab on page 289
- Assets Tab on page 289

- Sites Tab on page 291
- Beneficiaries Tab on page 290

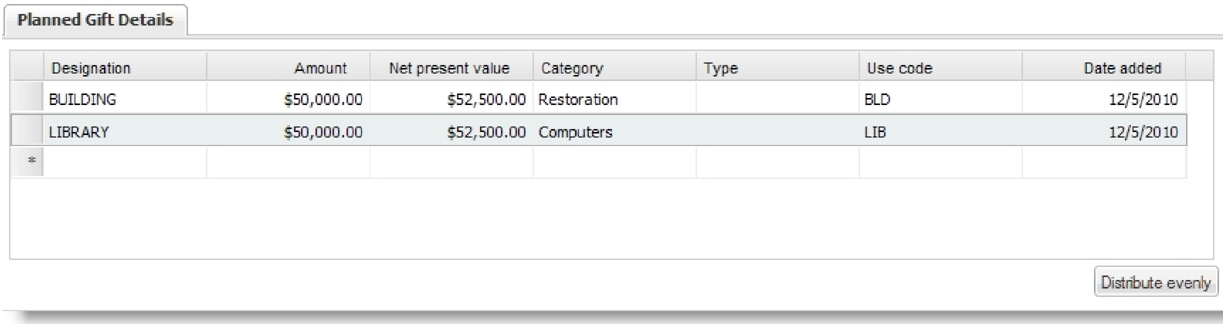
Planned Gift Vehicle Types: Requirements to Add Planned Gifts as Revenue

The planned gift have a status of Accepted and include a designation. Depending on the planned gift vehicle it must also meet the following requirements.

Vehicle Type	Values Required
Charitable gift annuity	Payout amount
Charitable remainder unitrust	Remainder value
Charitable remainder annuity trust	Remainder value
Charitable lead trust	Payout amount
Charitable lead annuity trust	Payout amount
Pooled income fund	Payout amount
Life insurance	Gift amount and Life insurance premium amount
Retained life estate	Gift amount
Bargain sale	Gift amount
Outright gift	Gift amount
Bequest	Gift amount
Retirement plan assets	Gift amount
Testamentary charitable trust	Gift amount
Living Trust	Gift amount
Other	Gift amount

Planned Gift Details Tab

On the Planned Gift Details tab, enter information about the designations to which to apply the planned gift. The designations indicate how the prospect wants your organization to use the revenue. For information about the items on this tab, see Edit Planned Gift Details on page 389.



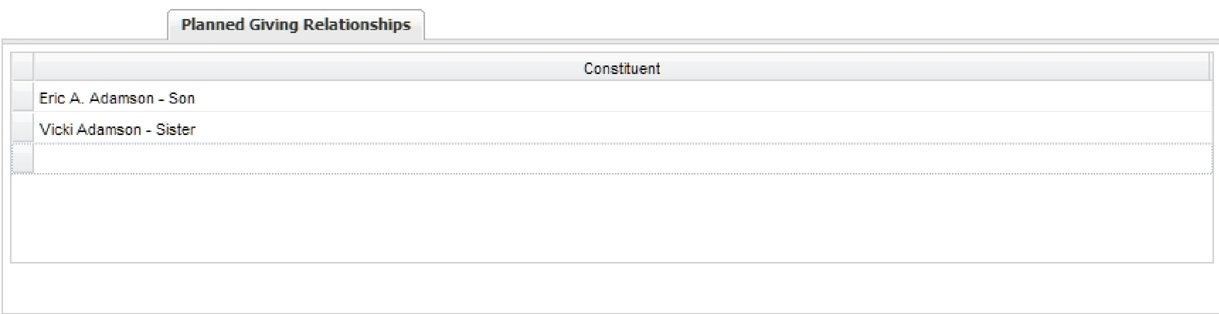
Planned Gift Details

Designation	Amount	Net present value	Category	Type	Use code	Date added
BUILDING	$50,000.00	$52,500.00	Restoration		BLD	12/5/2010
LIBRARY	$50,000.00	$52,500.00	Computers		LIB	12/5/2010

Distribute evenly

Planned Giving Relationships Tab

On the Planned giving relationships tab, select the prospect relationships associated with the planned gift, such as an attorney or a family member. From a constituent, when you click **Revenue** under **More information**, there is a Planned Gifts tab. The planned gift will appear for the prospect, as well as any constituents listed as planned giving relationships.



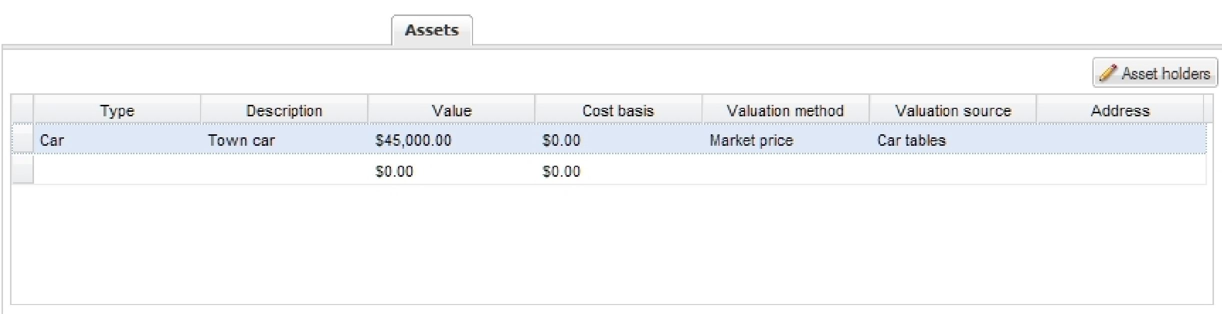
Planned Giving Relationships

Constituent
Eric A. Adamson - Son
Vicki Adamson - Sister

If the relationship you want does not appear as a selection, you can add the relationship as necessary. Under **Constituent**, click **New** and select the type of relationship to add. For information about how to add relationships, see the *Constituents Guide*.

Assets Tab

On the Assets tab, you can track any information you may have regarding the prospect's assets associated with the planned gift, such as a house, an automobile, or stock assets.



Assets

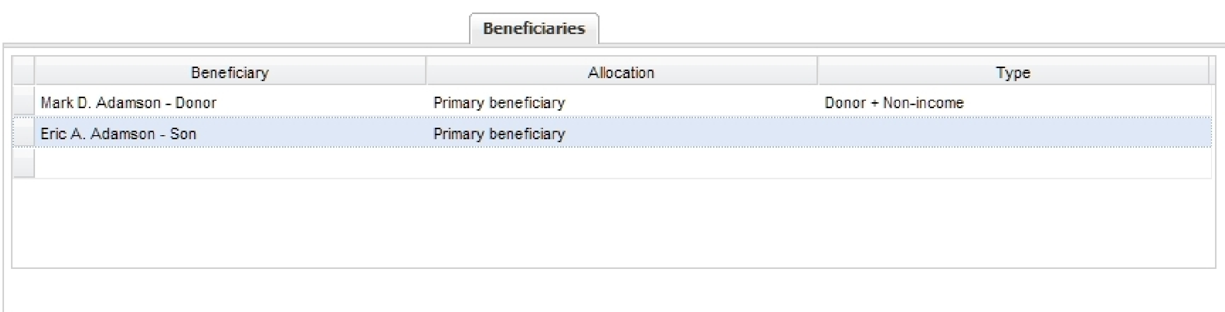
Asset holders

Type	Description	Value	Cost basis	Valuation method	Valuation source	Address
Car	Town car	$45,000.00	$0.00	Market price	Car tables	
		$0.00	$0.00			

Screen Item	Description
Type	Select the type of asset to record such as House or Car.
Description	Enter a unique description to help identify the asset. For example, for a house, you may want to enter Primary residence.
Value	Enter a market value for the asset.
Cost basis	Enter any cost associated with the asset at the time your organization receives it. For example, for a planned gift of stock, enter any broker fees or other expenses. You can deduct this cost from the total gift amount.
Valuation method	Select how you determine the value of the asset.
Valuation source	Enter the source of the valuation method.
Address	Search for and select the prospect address to associate with the asset.
Asset holders	To enter who currently holds the asset, click this button. On the Assets held by screen, select the prospect relationship that holds the asset, or search for and select the asset holder as necessary.

Beneficiaries Tab

If the selected planned gift vehicle has the potential to include beneficiary information, such as Life insurance, the Beneficiaries tab appears. On this tab, enter information about the beneficiaries associated with the planned gift.

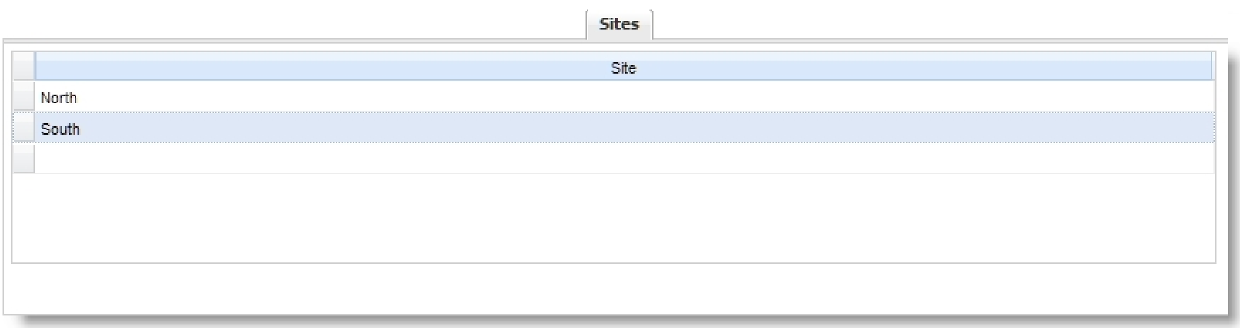


Screen Item	Description
Beneficiary	Select the beneficiaries associated with the planned gift. You can select a prospect relationship or search for and select a constituent as necessary.

Screen Item	Description
Allocation	For each beneficiary, select the applicable allocation, such as Primary beneficiary or Tertiary beneficiary.
Type	For each beneficiary, select the applicable type. For example, if the beneficiary is the primary donor of the planned gift but does not receive a monetary benefit from the gift, select Donor + Non-income. For a Retained life estate, you can select Donor, Non-income, or Donor + Non-income.

Sites Tab

If your organization includes multiple sites, you can restrict use of the planned gift to specific sites. On the Sites tab, select the sites to access with the planned gift.



Edit a Planned Gift

After you add a planned gift, you can edit its information as necessary. For example, you can update its net present value or payout information.

Note: If you work from a group prospect, you cannot edit a planned gift. You can edit planned gifts only from the group members records. This information then appears under **Cumulative group member giving summary** and **Group member planned gifts**.

Edit a planned gift

1. Access the record of the prospect with the planned gift to edit.
2. Select the Planned Gifts tab.
3. Under **Planned gifts**, select the gift to edit.
4. On the action bar, click **Edit**. The Edit planned gift screen appears. The items on this screen are the same as the Add a planned gift screen.
5. Edit the information as necessary.
6. Click **Save**. You return to the Planned Gifts tab.

Delete a Planned Gift

After you add a planned gift, you can delete it as necessary.

Delete a planned gift

1. Access the record of the prospect from which to delete the planned gift.
2. Select the Planned Gifts tab.
3. Under **Planned gifts**, select the gift to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the gift.
5. Click **Yes**. You return to the Planned gifts tab.

Funding Interests

From the Funding Interests tab on a prospect record, you can specify the organizations, affiliations, activities, or pursuits in which a prospect expresses interest. You can then define the degree of the prospect's interest or lack of interest. You can also restrict access to the interest information based on selected sites.

For example, if you enter a funding interest of "Visual Arts" with a strength of "Extremely" positive" for a prospect, then enter a funding interest of "Football" with a strength of "Somewhat negative," you can use this information to determine the designations to which the prospect may be willing to contribute.

In addition, you can filter the information displayed on the tab based on sites. In the **Sites** field, select the sites on which you want to base your filter and click **Apply**. Regardless of your filtering criteria, only sites to which you have rights will display.

After you define funding interests for the prospect, you can select these interests from the Funding Types tab on an opportunity record. You can use this information when you create steps for solicitors to interact with the prospect. For more information about how to link the prospect's funding interests to an opportunity, see Funding Types on page 320.

Add Funding Interests

As you learn more about your prospects, you can determine the individual or organization's interests, as well as discover which activities, pursuits, or associations the prospect has little or no interest in supporting. With this information, solicitors can approach the prospect with funding needs that match the prospect's interests.

Add a funding interest

1. From a prospect record, select the Funding Interests tab.
2. Click **Add**. The Add a funding interest screen appears.
3. In the **Funding type** field, select a funding interest.

4. In the **Level of interest** field, select the degree of the prospect's interest in the funding type.
5. In **Comments**, enter any details about the prospect's interest.
6. In the **Site** field, enter the site in your organization to which the funding interest applies.
7. Administrators can set up security access to constituents based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this funding interest as soon as you click **Save**.
8. Click **Save**. You return to the Funding Interests tab.

Add a Funding Interest Screen Fields

Screen Item	Description
Funding type	Select the type of funding the prospect either has an interest in or has shown a lack of interest in supporting. Your organization defines funding types in **Code Tables** in *Administration*. For information about how to manage code table entries, see the *Administration Guide*.
Level of interest	Select the level of interest the prospect has shown in the funding type. You can use this to determine which designations the prospect may want to associate with a major gift.
Comments	Enter any additional details.
Sites	In the **Sites** field, select the site that you want to use to secure this interest information. This field contains only sites to which you have rights. When you select a site and save the interest, only users with access to the selected site can view this information.

Edit Funding Interests

You can update the information about a prospect's funding interest.

Edit a funding interest

1. From the Funding Interests tab, select the funding interest to edit.
2. Click **Edit**. The Edit funding interest screen appears.
3. In the **Funding type** field, select a funding interest.
4. In the **Level of interest** field, select the degree of the prospect's interest in the funding type.
5. In **Comments**, enter any details about the prospect's interest.
6. In the **Sites** grid, enter any sites to which you want to restrict this information.
7. Click **Save**. You return to the Funding Interests tab.

Campaigns

If a prospect plan includes an opportunity and the opportunity is associated with a campaign, the campaign displays on the Campaigns tab of the prospect record. In addition, you must have site access to the plan in order for the information to display on the Campaigns tab.

From this tab you can go to the campaign record or go to the opportunity record associated with the campaign.

Go to Campaign Record

To open an opportunity campaign record from a prospect, from the prospect record, select the Campaigns tab. In the **Opportunity campaigns** grid, select the campaign you want to open and click **Go to campaign**. The campaign record displays, and you can make any necessary changes.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about how to access a prospect record, see View Prospects on page 273.

Go to Opportunity Record

To open the opportunity record associated with a campaign from a prospect, from the prospect record, select the Campaigns tab. In the **Opportunity campaigns** grid, select the campaign associated to the opportunity you want to open and click **Go to opportunity**. The opportunity record displays, and you can make any necessary changes.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about how to access a prospect record, see View Prospects on page 273.

Prospect Manager History

This tab displays a list of previous prospect managers along with the dates they served as a manager for the prospect. Managers displayed on this tab have been replaced as managers through the **Replace prospect manager** function.

From this tab, you can edit the dates associated with the manager, go to the manager's Fundraiser page, and delete the manager from the prospect record.

Edit Dates for Replaced Prospect Manager

Edit dates associated with the replaced prospect manager

1. From the Prospect Manager History tab on the prospect record, in the **Prospect manager history** grid, select the replaced manager you want to edit.
2. Click **Edit**. The Edit historical prospect manager screen appears.

3. You can enter a new **Start date** or **End date** used to define the prospect manager's tenure.
4. Click **Save** to save the changes and return to the Prospect page.

Delete Historical Prospect Manager

Delete historical prospect manager

1. From the Prospect Manager History tab on the prospect record, in the **Prospect manager history** grid, select the replaced manager you want to delete.
2. Click **Delete**. A confirmation screen appears.
3. Click **Yes** to remove the manager and return to the Prospect page.

View Fundraiser Page of Historical Prospect Manager

View the Fundraiser page of a historical prospect manager

1. From the Prospect Manager History tab on the prospect record, in the **Prospect manager history** grid, select the replaced manager you want to view.
2. Click **Go to fundraiser**. The selected manager's Fundraiser page appears.

Manage Prospects and Plans in Bulk

To more easily manage multiple prospects and prospect plans at once, you can add plans and opportunities in bulk. You can add a new plan, with or without a new opportunity, to a group of constituents. You can also add a new opportunity to an existing plan for a group of constituents.

Add Prospect Plans in Bulk

With **Add prospect plans in bulk**, you can create plans for a selection of constituents. For example, you want every constituent of a certain class cultivated the same way, and you do not want to go through the extra work involved to create plans specific to each individual. Instead, you want to define a template and automatically assign the same plan to all constituents included in your selection.

The **Add prospect plans in bulk** function, allows you to create a process that:

- Identifies the constituent selection which contains the records to which you want to bulk assign the plan
- Selects the plan outline created for this specific group
- Assigns managers and solicitors
- Designates a plan start date
- Restricts the process to a specific site
- Adds opportunities

- Adds the "Prospect" constituency to any constituents included in the process that are not already designated a "Prospect."

Run an existing "Add prospect plan" process

1. From the Prospects page, click **Add prospect plans in bulk**. The Add prospect plans page appears.
2. In the **Add prospect plans processes** grid, select the plan process you want to run.
3. Click **Start process**. The Run add prospect plans process screen appears.
4. From this screen you can change the **Plan name**, **Narrative**, and **Plan start date**. To make changes to any other definition fields, see Edit an "Add prospect plan" process on page 296.
5. Click **Start**. The process runs and the process page appears.

Edit an "Add prospect plan" process

1. From the Prospects page, click **Add prospect plans in bulk**. The Add prospect plans page appears.
2. In the **Add prospect plans processes** grid, select the plan process you want to edit.
3. Click **Edit**. The Edit an add prospect plans process screen appears.
4. Make any necessary changes. All items included on this screen are the same as those included on the Add an add prospect plan process screen. For information, see Add an Add Prospect Plans Process Screen on page 297.
5. Click **Save**. You return to the Add prospect plans page.
6. To run the process, select the process in the grid and click **Start process**.

Delete an "Add prospect plan" process

1. From the Prospects page, click **Add prospect plans in bulk**. The Add prospect plans page appears.
2. In the **Add prospect plans processes** grid, select the plan process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. You return to the Add prospect plans page. The process you just deleted no longer displays in the grid.

Go to an "Add prospect plan" process page

1. From the Prospects page, click **Add prospect plans in bulk**. The Add prospect plans page appears.
2. In the **Add prospect plans processes** grid, select the plan process you want to view.
3. Click **Go to process**. The process page appears.

Add an Add Prospect Plans Process Screen

Field name	Description
Name	Name of the bulk plan process. This displays in the **Name** column of the Add Prospect Plans Process tab.
Description	Description to help you identify the purpose of the process. This displays in the **Description** column of the Add Prospect Plans Process tab.
Constituent selection	Selection of constituent records you want associated with the plan identified in the bulk process. Click the search icon at the end of the field to access the Selection Search screen. From here, you can search for and select the selection of records to use. Selections are created in *Query*.
Manager for new prospects	Prospect manager not associated with the plan. This manager is applied only to constituents in the selection that are not prospects before the bulk processing. Constituents already prospects retain their original prospect manager.

- Plan Details Tab on page 297
- Plan Steps Tab on page 298
- Opportunity Tab on page 299

Plan Details Tab

Field name	Description
Plan name	Name of the plan you want to assign to the constituents included in your selection.
Plan type	Type of plan: Major gift, Planned gift, Recurring gift.
Narrative	You can include a brief narrative to describe the plan.
Plan start date	You can select the start date for the plan.
Sites	Site in your organization to which the process is associated. **Note:** Administrators can set up security access to prospect plans based on sites. Any security settings your administrators established for the site you specify in the **Site** field take effect for this prospect plan as soon as you click **Save**.

Field name	Description
Primary manager, and **Secondary manager**	Fundraisers associated with the plan identified in the bulk process. Which fields you complete depends on your organizations fundraising workflow. Click the search icon at the end of the fields to access a search screen. From here, you can search for and select the manager and fundraiser.
Secondary solicitors	In the **Secondary solicitor** column, click the search icon at the end of the field to access the search screen. From here, you can search for and select the solicitor to use. In the **Role** column, you can specify the responsibilities of this solicitor in this plan.

Plan Steps Tab

On this tab you can define steps you want to include in this bulk process.

Field name	Description
Insert step	In the grid, select the row beneath where you want to add an additional step and click **Insert step**. A blank row appears above the selected row.
Edit additional details	In the grid, select the step you want to edit and click **Edit additional details**. The Edit additional details screen appears, and you can make any necessary changes.
Select all, **Clear all**	To select all rows or to clear the selection of rows, use these buttons.
Days from start	Sets the date for the plan step relative to the **Plan start date** entered on the Plan details tab. For example, if the **Plan start date** is 2/15 and you enter “2” in the **Days from start** field, the plan step starts on 2/17. In addition, if you specify an **Expected date**, the expected date overrides any **Days from start** information you entered.
Expected date	Enter the date you expect the step to take place.
Objective	The purpose or purpose code for the step.
Owner	Click the binoculars to access the Search screen and assign a fundraiser to the step.
Stage	Select the stage of the step, such as Cultivation or Negotiation.
Status	Select the status of the step, such as planned or pending.
Contact method	Select how you intend to contact the prospect for this step.
Category	Select a category to further define the contact method.

Field name	Description
Additional solicitors	This field is read-only on the Plan steps tab. If you click the **Edit additional details** button and add **Additional solicitors** from the Edit additional details screen, this field displays “Yes.” If no **Additional solicitors** are selected, it displays “No.”
Participants	This field is read-only on the Plan steps tab. If you click the **Edit additional details** button and add **Participants** from the Edit additional details screen, this field displays “Yes.” If no **Participants** are selected, it displays “No.
Plan outline	Select an existing plan outline to use with this bulk process. Outlines are created from the Plan outline tab in **Major Giving Setup**. Outlines identify each step of the solicitation process.
Adjust days from start	To adjust the **Expected date** entries, select the step or steps you want to change and either “+” or “-” .

Opportunity Tab

Field name	Description
Opportunity type	On the Opportunity tab, select the opportunity type to associate with the plan included in this process: Outright gift, Corporate gift, Planned gift. Opportunity types are created in **Code tables** in *Administration*.
Opportunity status	You can specify a status for the opportunity: either Unqualified or Qualified.
Expected ask amount / Ask amount	If you selected the opportunity status Unqualified, you can enter the amount you intend to request from the constituents included in the bulk process. The expected ask amount must be greater than $0, or the opportunity does not add to the prospect plan. If the opportunity status is Qualified, you can enter the ask amount, which will be placed in the **Ask amount** field as well as the **Expected ask amount** field on the opportunity.

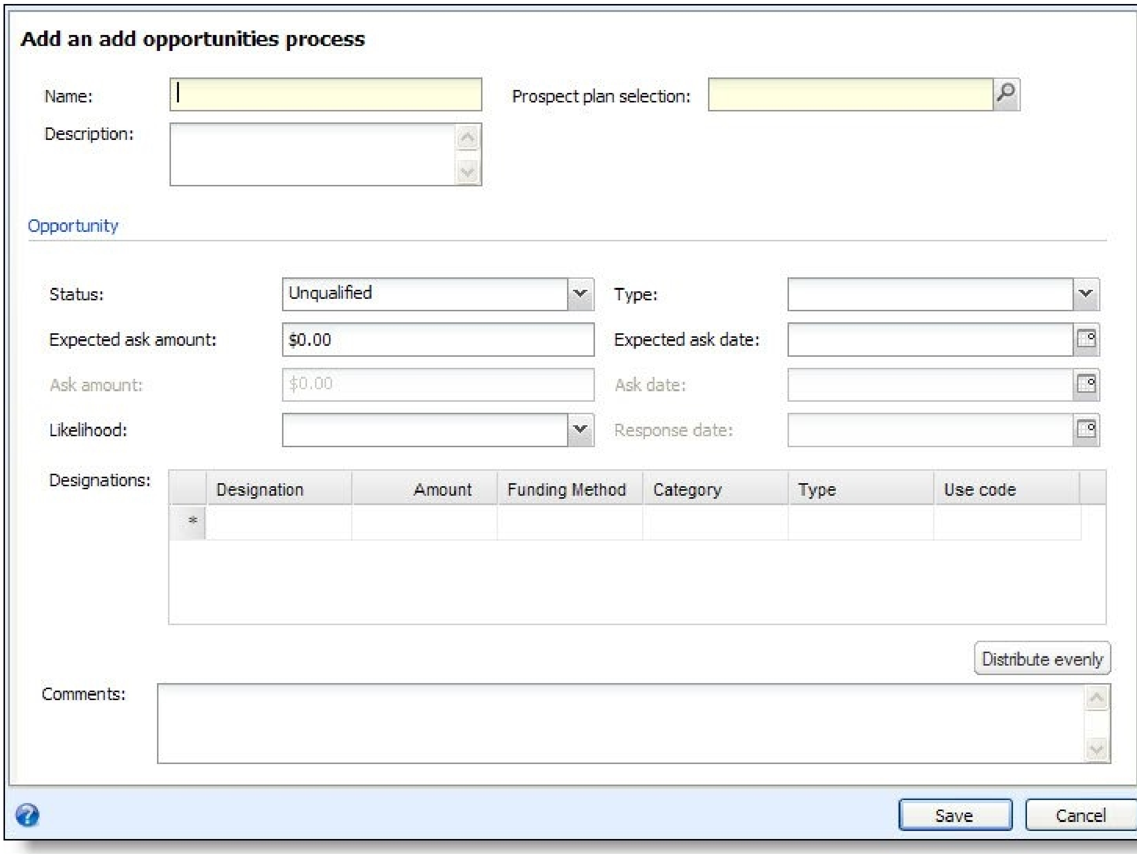
Field name	Description
Designations	In the **Designation** column, identify the area you intend to use the money generated from this bulk prospect plan process: Annual Campaign, Youth Program. Click the search icon at the end of the field to access the Designation Search screen. From this screen, you can search for and select the designation you want to use. You can enter as many designations as necessary in the **Designation** column. In the **Amount** column, enter the amount of the gift you want allocated to the corresponding designation. For example, if you plan to ask for $100,000 and you enter two designations - Annual Campaign and Endowment Campaign - you can allocate $50,000 to the Annual Campaign by entering this amount in the **Amount** column row that corresponds to the Annual Campaign. To split the amount equally among all designations selected, click **Distribute evenly**. You can also enter additional information, such as a funding method, category, type, or use code. The total of the designations must match the total **Expected ask amount** or **Ask amount**. In the **Funding Method** column, select how the prospect will fund the gift such as pledge or planned gift bequest. To define how you will use the revenue from the prospect opportunity, in the **Category**, **Type**, and **Use code** columns, select the categories, types, and use codes within each designation to which to apply the revenue.

Add Opportunities in Bulk

With **Add opportunities in bulk**, you can add opportunities for a selection of prospect plans. For example, you want every prospect plan of certain type to have the same opportunity and expected ask amount, and you do not want to go through the extra work involved to create opportunities specific to each individual and plan. Instead, you want to define a template and automatically assign the same opportunity to all prospect plans included in your selection.

Add an “Add opportunities” process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Add Opportunities Process tab, click **Add**. The Add an add opportunities process screen appears.



3. Enter the necessary information. For detailed explanations of all items included on this screen, see Add an Add Opportunities Process Screen on page 302.
4. Click **Save**. You return to the Add Opportunities Process tab of the Manage prospects and plans in bulk page.

Note: This process does not create an opportunity of the designated name and type if the same name and type is already included on an existing plan. In this situation, an exception appears on the process report.

5. To run the process, click **Start process**.

Run an existing "Add opportunities" process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Add Opportunities Process tab, select the process and click **Start process**. The Run add opportunities process screen appears.
3. From this screen you can change basic information such as the opportunity name, type, or expected ask amount. To make changes to any other fields, see Add an Add Opportunities Process Screen on page 302.
4. Click **Start**. The process runs and the process page appears.

Edit an "Add opportunities" process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Add Opportunities Process tab, select the process and click **Edit**. The Edit an add opportunities process screen appears.
3. Make any necessary changes. All items included on this screen are the same as those included on the Add an add prospect plan process screen. For information, see Add an Add Opportunities Process Screen on page 302.
4. Click **Save**. You return to the Add Opportunities Process tab of the Manage prospects and plans in bulk page.
5. To run the process, select the process and click **Start process**.

Delete an "Add opportunities" process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Add Opportunities Process tab, select the process and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Add Opportunities Process tab of the Manage prospects and plans in bulk page.

Go to an "Add opportunities" process page

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Add Opportunities Process tab, select the process and click **Go to process**. The process page appears.

Add an Add Opportunities Process Screen

Field name	Description
Name	Name of the bulk opportunities process. This displays in the **Name** column of the Add Opportunities Process tab.
Description	Description to help you identify the purpose of the process.
Prospect plan selection	Selection of prospect plans you want associated with the opportunity identified in the bulk process. Click the search icon at the end of the field to access the Selection Search screen. From here, you can search for and select the selection of records to use. Selections are created in *Query*.

Field name	Description
Status	You can specify a status for the opportunity: either Unqualified, Qualified, or Response pending.
Expected ask amount	Enter the estimated amount you intend to request from the constituents included in the bulk process.
Ask amount	Enter the amount most closely representing the amount you intend to request from the constituents included in the bulk process.
Likelihood	Select a percentage to represent the likelihood that the opportunity will be accepted.
Type	Opportunity type to add to the plans included in this process. Opportunity types are created in **Code tables** in *Administration*.
Currency	With *Multicurrency*, the **Currency** field appears. Use this field to determine how you want to view transaction amounts in the report. "Base" is the base currency of the associated account system. "Organization" is the organization currency, and "Transaction" is the revenue's transaction currency. When you add revenue, the program calculates and stores the base currency and organization currency amounts, along with the original transaction currency amount. When you switch currencies on the report, the amounts displayed are the original currency amounts calculated when the transactions were added.
Expected ask date	Enter the estimated date you intend to request from the constituents included in the bulk process.
Ask date	Enter the date most closely representing the date you intend to request from the constituents included in the bulk process.

Field name	Description
Response date	Select a response date.
Designations	In the **Designation** column, identify the area you intend to use the money generated from this bulk opportunity process. Click the search icon at the end of the field to access the Designation Search screen. From this screen, you can search for and select the designation you want to use. You can enter as many designations as necessary in the **Designation** column. In the **Amount** column, enter the amount of the gift you want allocated to the corresponding designation. To split the amount equally among all designations selected, click **Distribute evenly**. You can also enter additional information, such as a funding method, category, type, or use code. The total of the designations must match the total **Expected ask amount** or **Ask amount**. In the **Funding Method** column, select how the prospect will fund the gift such as pledge or planned gift bequest. To define how you will use the revenue from the prospect opportunity, in the **Category**, **Type**, and **Use code** columns, select the categories, types, and use codes within each designation to which to apply the revenue.
Comments	Enter any comments related to the opportunities process.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of "Did not finish." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh**.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and and click **Delete**.

Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

> ***Note:*** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

> ***Note:*** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.
2. In the **Job name** field, enter a name for the scheduled process.

3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
   a. For a process that runs once, select the date and time to run it.
   b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
   c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to Create Job Screen on page 441.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.

Screen Item	Description
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

Generate a Windows Scripting File

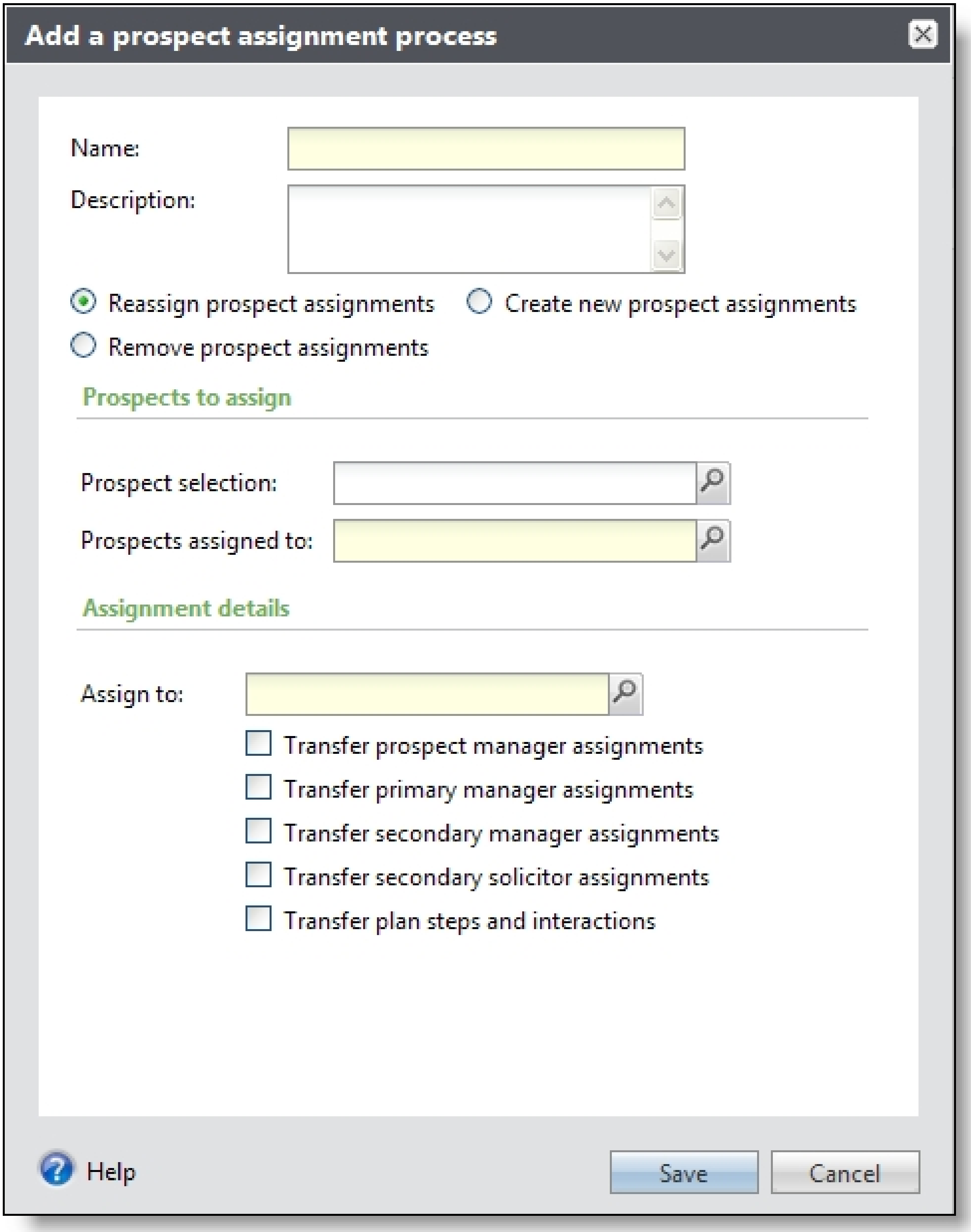
1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

Add Prospect Assignments in Bulk

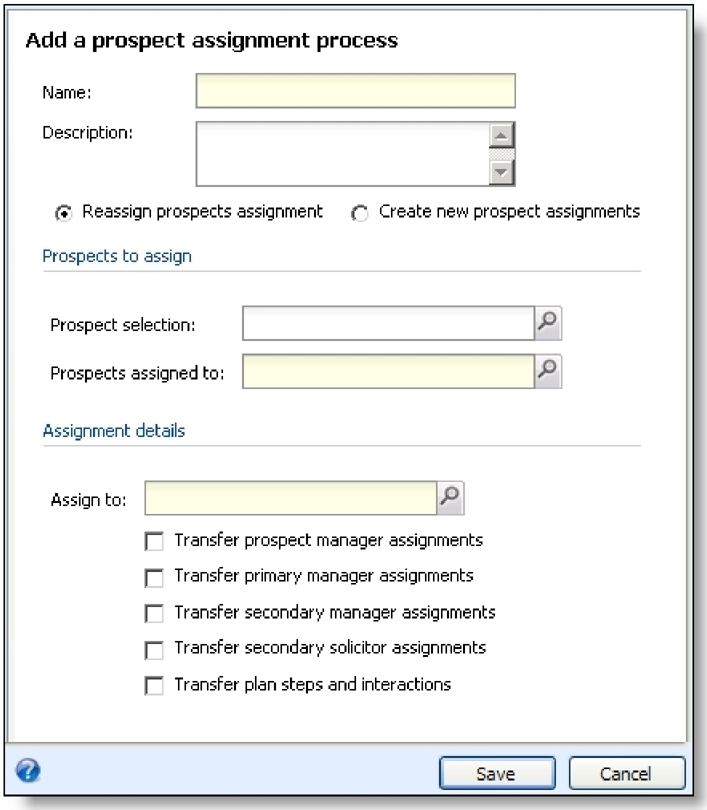
With the **Add a prospect assignment process**, you can assign a large number of prospects to fundraisers in your database. You can also reassign and remove prospects using this process.

Access the **Add a prospect assignment process** from the Prospect Assignment Process tab on the Manage prospects and plans in bulk page.


Add a prospect assignment process
Name:
Description:
Reassign prospect assignments
Create new prospect assignments
Remove prospect assignments
Prospects to assign
Prospect selection:
Prospects assigned to:
Assignment details
Assign to:
Transfer prospect manager assignments
Transfer primary manager assignments
Transfer secondary manager assignments
Transfer secondary solicitor assignments
Transfer plan steps and interactions
Help
Save
Cancel

Add a “Prospect assignment” process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Prospect Assignment Process tab, click **Add**. The Add a prospect assignment process screen appears.



3. Enter the necessary information. For detailed explanations of all items included on this screen, see Add a Prospect Assignment Process Screen on page 311.
4. Click **Save**. You return to the Manage prospects and plans in bulk page. Your new process displays in the **Prospect assignment processes** grid.
5. To run the process, click **Start process**.

Run an existing “Prospect assignment” process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Prospect Assignment Process tab, in the **Prospect assignment processes** grid, select the process you want to run.
3. Click **Start process**. The Run prospect assignment process screen appears.

4. From this screen you can change the **Name**, **Description**, prospect selections, and assignment details.
5. Click **Start**. The process runs and the process page appears.

Edit a "Prospect assignment" process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Prospect Assignment Process tab, in the **Prospect assignment processes** grid, select the process you want to edit.
3. Click **Edit**. The Edit prospect assignment process screen appears.
4. Make any necessary changes. All items included on this screen are the same as those included on the Add a prospect assignment process screen. For information, see Add a Prospect Assignment Process Screen on page 311.
5. Click **Save**. You return to the Manage prospects and plans in bulk page.
6. To run the process, select the process in the grid and click **Start process**.

Delete an "Prospect assignment" process

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Prospect Assignment Process tab, in the **Prospect assignment processes** grid, select the process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. You return to the Manage prospects and plans in bulk page. The process you just deleted no longer displays in the grid.

Go to a "Prospect assignment" process page

1. From the Prospects page, click **Manage prospects and plans in bulk**. The Manage prospects and plans in bulk page appears.
2. On the Prospect Assignment Process tab, in the **Prospect assignment processes** grid, select the process you want to view.
3. Click **Go to process**. The process page appears.

Add a Prospect Assignment Process Screen

Field name	Description
Name	Name of the prospect assignment process. This displays in the **Name** column of the Prospect Assignment Process tab.

Field name	Description
Description	Description to help you identify the purpose of the process. This displays in the **Description** column of the Prospect Assignment Process tab.
Reassign prospect assignments	Select this to reassign existing prospects with a new fundraiser.
Create new prospect assignments	Select this to create new prospect assignments for prospects with no fundraiser.
Remove prospect assignments	Select this to remove prospect assignments from fundraisers. When you select this option, the **Assignment details** options at the bottom of the screen change.
Prospect selection	Select the prospect records you want associated with the bulk process. The prospect selection you specify includes prospects and their associated plans. Click the search icon at the end of the field to access the Selection Search screen. From here, you can search for and select the selection of records to use. Selections are created in *Query*.
Prospects assigned to	When you select to reassign prospect assignments, the **Prospects assigned to** field appears. Use this field to select the current fundraiser associated with the prospects and prospect plans you are reassigning.
Assign to	When you select to reassign prospects assignments, use this field to select the fundraiser to whom you want to reassign prospects assignments. When you select to create new prospect assignments, use this field to select the fundraiser for whom you want to create new prospect assignments.
Transfer prospect manager assignments	When you select to reassign prospects assignments, you can select to transfer prospect manager assignments on the prospect record.
Transfer primary manager assignments	When you select to reassign prospects assignments, you can select to transfer primary manager assignments on the prospect plan record.
Transfer secondary manager assignments	When you select to reassign prospects assignments, you can select to transfer secondary manager assignments on the prospect plan record.
Transfer secondary solicitor assignments	When you select to reassign prospects assignments, you can select to transfer secondary solicitor assignments on the prospect plan record.
Transfer plan steps and interactions	When you select to reassign prospects assignments, you can select to transfer plan steps, interactions, as well as interactions not associated with a plan on the prospect plan record.

Field name	Description
Fill prospect manager vacancies	When you select to create new prospect assignments, you can select to fill prospect manager vacancies on the prospect record. The checkbox appears only when you select **Create new prospect assignments**.
Fill primary manager vacancies	When you select to create new prospect assignments, you can select to fill primary manager vacancies on the prospect plan record. The checkbox appears only when you select **Create new prospect assignments**.
Fill secondary manager vacancies	When you select to create new prospect assignments, you can select to fill secondary manager vacancies on the prospect plan record. The checkbox appears only when you select **Create new prospect assignments**.
Remove prospect manager assignments	When you select to remove prospect assignments, you can then select to remove prospect manager assignments from the prospect record. The checkbox appears only when you select **Remove prospect assignments**.
Remove primary manager assignments	When you select to remove prospect assignments, you can then select to remove primary manager assignments from the prospect record. The checkbox appears only when you select **Remove prospect assignments**.
Remove secondary manager assignments	When you select to remove prospect assignments, you can then select to remove secondary manager assignments from the prospect record. The checkbox appears only when you select **Remove prospect assignments**.
Remove secondary solicitor assignments	When you select to remove prospect assignments, you can then select to remove secondary solicitorassignments from the prospect record. The checkbox appears only when you select **Remove prospect assignments**.
Remove plan steps and interactions	When you select to remove prospect assignments, you can then select to remove plan steps and interactions from the prospect record. The checkbox appears only when you select **Remove prospect assignments**.

Tabs of a Process Page

For more information about the status page for the Prospect assignment business process, see Tabs of a Process Status Page on page 439.

Prospect Plans

The Plan page, accessed from the Plans tab of a prospect, tracks the prospect's plan activity including step details, ask opportunities, fundraisers associated with the prospect plan, and any planned gifts. From this page, you can view steps, mark steps "Complete", edit a step, and more.

Any changes you make to a plan from in the prospect do not affect the general plan. The changes appear only on the selected prospect's plan.

Details Tab

The Details tab on the Plan page is divided into three sections. From the **Narrative** section you can enter any notes or comments you want to record about this plan and prospect. The **Planned and pending steps** section lists all pending planned steps. From this section, you can edit, add, view, and delete steps. You can also mark a step complete and add documentation, such as an attachment or media link. The **Completed steps** section lists all completed, canceled, and declined steps. From this section, you can edit, add, view, and delete steps. You can also add documentation, such as an attachment or media link.

Edit Narrative

In the **Narrative** section, you can access a text editor and enter any information you want associated with this plan. Click **Edit** and the Edit plan narrative screen appears. In this text editor, you can maintain detailed notes about this plan.

Write a Letter

From the Details tab of a prospect plan, you can write a quick letter to the prospect using a Microsoft *Word* template you previously saved to the Letter Template Library in *Configuration*. In the **Planned and pending steps** grid, select the individual to whom to send the letter. On the action bar click **Write a Letter**. The Write a letter screen appears. For information about the fields and options included on this screen, click the help icon provided on the screen.

For information about the Write a letter screen, see the Constituent Page Tasks section of the help file.

Mark Step Complete

From the **Planned and pending steps** sections on the Details tab of the Plan page, you can mark a selected step complete and record date and status information for the completed step. The step is then moved into the **Completed steps** section.

Mark a selected step complete

1. From the **Planned and pending steps** sections on the Details tab of the Plan page, select the step you want to mark as “Complete”.
2. Click the drop-down arrow next to **Step** and select **Mark complete**. The Mark step complete screen appears.
3. In the **Date** field, today’s date defaults. If the completion date is different from today’s date, enter the date on which the step was completed.
4. Click **Save** to save the information and return to the Overdue steps tab.

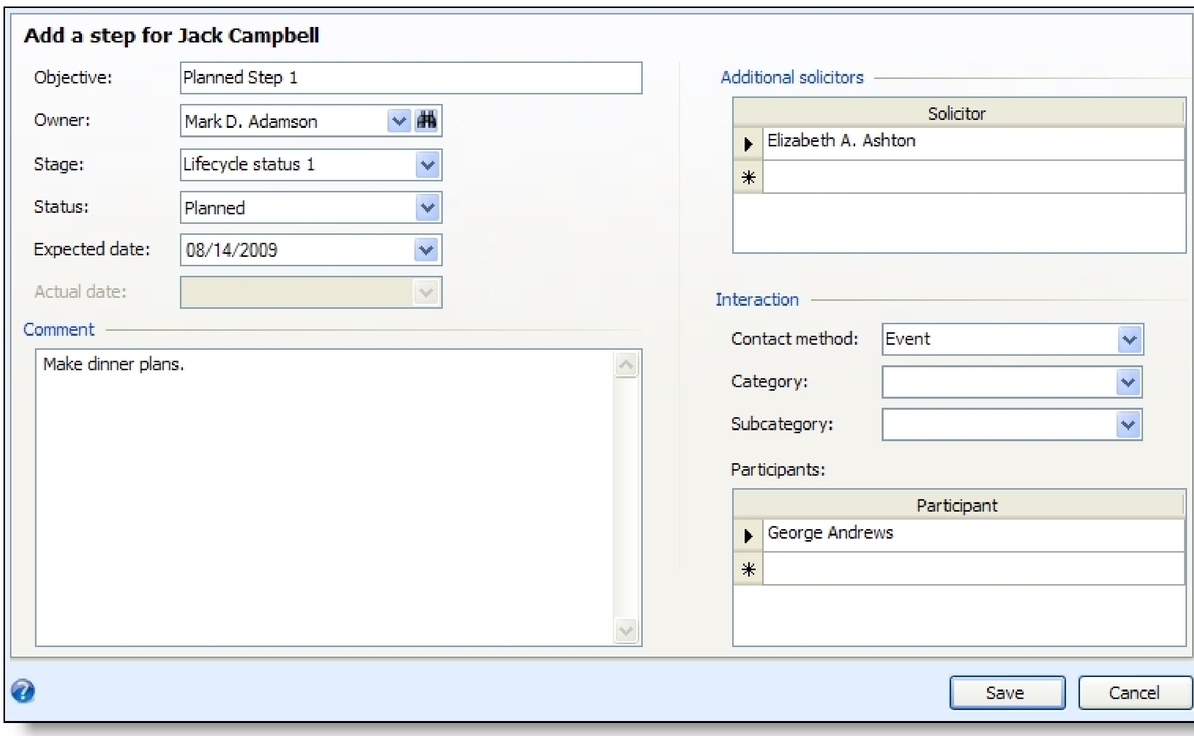
Add Prospect Plan Steps

From either the **Planned and pending steps** or **Completed steps** section on the Details tab of the Plan page, you can add prospect steps.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Add a prospect step from the prospect

1. From either the **Planned and pending steps** or **Completed steps** section on the Details tab of the Plan page, click **Add step**. The Add a step screen appears.



2. Enter the necessary information.
3. Click **Save** to save the information and return to the Plan page.

Add a Step Screen Fields

You can add a new step to an existing plan from the Add step screen.

Screen Item	Description
Objective	The purpose or purpose code for the step.
Owner	Click the binoculars to access the Search screen and assign a fundraiser to the step.
Stage	Select the stage of the step.
Status	Select the status of the step, such as planned or pending. If you select a status of “Completed,” “Canceled,” or “Declined,” the program automatically moves the step to the **Completed steps** section.
Expected date	Enter the date you expect the step to take place.
Actual date	If the step took place, enter the date it actually took place.
Comments	Enter any additional information you want to include with the step.
Additional solicitors	Click the binoculars to access the Search screen and assign additional solicitors if necessary.
Contact method	Select how you intend to contact the prospect for this step.
Category	Select a category to further define the contact method.
Subcategory	Select a subcategory to further define the contact method.
Participants	List all prospects that will participate in this step. This is especially helpful if you are working with a constituent group prospect.

Edit Prospect Steps

From either the **Planned and pending steps** or **Completed steps** section on the Details tab of the Plan page, you can edit existing prospect steps. In addition, from the **Planned and pending steps** section, you can choose to **Edit all** steps included in the section.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Edit a prospect step from the prospect

1. From either the **Planned and pending steps** or **Completed steps** section on the Details tab of the Plan page, select the step you want to edit.
2. Or in the **Planned and pending steps** section click **Edit steps** to edit all steps in the section.

3. Click the drop-down arrow next to **Step** and select **Edit**. The Edit a step screen appears.
4. Enter the necessary information. The fields and options included on the Edit a step screen are the same as those included on the Add a step screen.
5. Click **Save** to save the information and return to the Plan page.

Edit Steps Screen Fields

Screen Item	Description
Add steps from plan outline	If on the Plan outline tab in **Major Giving Setup** you created an outline of the plan you want to implement for certain **Plan type**(s), click the **Add steps from plan outline** drop-down arrow and select the outline you want used for this prospect. The selected outline defaults in the grid. If no outlines exist in the program, the button is grayed out and reads **No plan outlines defined**.
Expected date	The date on which you intend to execute the associated step.
Objective	What you hope to accomplish during the planned step.
Owner	The individual responsible for executing the planned step. Click the binoculars to access the Search screen and locate the individual.
Stage	Where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
Status	Status of associated step: planned, pending, complete.
Actual date	If in the **Status** column you selected "Completed", enter the completion date. A date must be assigned to all "Completed" steps.
Contact method	How you intend to contact the prospect: email, phone call, meeting.
Additional solicitors	"Yes" = additional solicitors are assigned; blank = no additional solicitors assigned.
Participants	"Yes" = participants are assigned; blank = no participants assigned.
Update status	Select an updated status to apply to any selected row in the **Steps** grid.
Insert step	In the **Steps** grid, select the row beneath where you want to add an additional step and click **Insert step**. A blank row appears above the selected row.
Edit additional details	In the **Steps** grid, select the step you want to edit and click **Edit additional details**. The Edit a step screen appears, and you can make any necessary changes.
Adjust expected dates	To adjust **Expected date** entries, select the step or steps you want to change and click the plus and minus buttons to adjust the dates.

Opportunities Tab

The Opportunities tab on the Plan page houses information about ask opportunities. From this tab, you can view, add, edit, or delete opportunities.

Edit an Opportunity

From the Opportunities tab of the Plan page, you can edit information included in existing ask opportunities.

Opportunity Search

To apply a revenue transaction toward an opportunity, you select the applicable opportunity when you add or edit the transaction. By default, the **Opportunity** field displays opportunities with statuses of accepted, qualified, unqualified, and response pending that are associated with the constituent, the constituent’s household, or other members of the constituent’s household. To apply the transaction to another opportunity, you can search for the applicable opportunity in the database.

When you apply a transaction to an opportunity with a status of qualified, unqualified, or response pending, the program automatically updates the status to accepted. The amount of the transaction appears in the **Revenue committed** field on the corresponding Opportunity page. For qualified and unqualified opportunities, the program automatically updates the ask date and response date to the transaction date. For opportunities with a response pending status, the program updates the response date to the transaction date.

Screen Item	Description
Last/Org/Group name and **First name**	Enter the name of the constituent to find. You can enter an entire name or only the beginning letters. For example, if you enter “Sm”, all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith.
Lookup ID	Enter the primary identifier used at your organization. You can enter the entire ID or only the beginning digits. For example, if you enter “1”, all lookup IDs that begin with the number 1 appear.
Designation/Ask amount/Ask date/Status	You can further limit your opportunity search by entering a specific designation, ask amount, ask date, or opportunity status associated with the opportunity you want to locate.
Match all criteria exactly	To use search criteria exactly as entered, select this checkbox. If you select this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered.
Check nickname	When you click **Show advanced search options**, this checkbox appears. To include nicknames from the Personal tab of individual constituent records in your search, select this checkbox and enter the nickname in the **First name** field.

Screen Item	Description
Check aliases	When you click **Show advanced search options**, this checkbox appears. To include aliases from the Names tab of constituent records in your search, select this checkbox and enter the alias in the name fields.
Check alternate lookup IDs	When you click **Show advanced search options**, this checkbox appears. To include alternate lookup IDs in your search, select this checkbox and enter the alternate lookup ID in the **Lookup ID** field.
Include deceased	When you click **Show advanced search options**, this checkbox appears. To include constituents marked as deceased in the search, select this checkbox.
Include inactive	When you click **Show advanced search options**, this checkbox appears. To include constituents marked as inactive in the search, select this checkbox.
Results	When you click **Search**, this grid displays the constituents that match the search criteria entered. For searches that return more than 100 constituents, only the first 100 appear.
Select	To select a constituent in the search results, select the constituent in the **Results** grid and click this button on the action bar.

Opportunity Page

From the Opportunities tab on the Plan page, you can view a selected opportunity from the **Go to opportunity** link.

From the Opportunity page, you can view and manage information about the prospect's opportunities. For example, you can view and access designation information and add revenue toward the opportunity.

Details

The Details tab of the prospect Opportunity page displays information about the Opportunity and any designations (annual campaign, building fund, camp program) associated with the opportunity.

This Opportunity details section of the Details tab displays the status, ask amount, amount committed, date, and other pertinent information associated with the prospect's opportunity.

Designation

This section of the Details tab displays any designations associated with the prospect opportunity.

Designations represent donor intent and track how you intend to use the revenue associated with the designation. You can manage designations from one central location—the Designation Hierarchies page. From *Fundraising*, select **Designation Hierarchies** to view this page. For more information, see the *Fundraising Guide*.

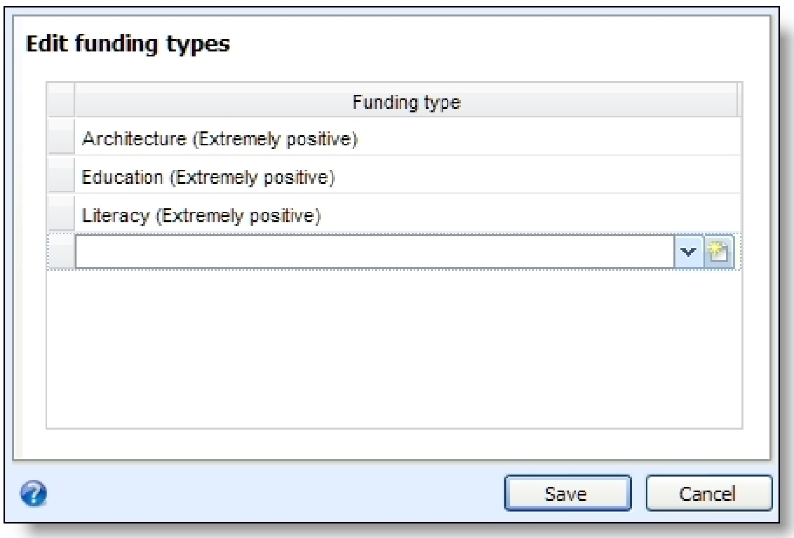
Funding Types

When you create a prospect record, you can specify which organizations, affiliations, activities, or pursuits the prospect expresses some interest in, and whether the response is positive or negative. For each funding interest you add to a prospect, you can define the level of interest, such as "Extremely positive," "Somewhat positive," or "Extremely negative."

Once you identify funding interests for a prospect, you can add these interests to the opportunities you add to the prospect's plans. You can use this information to determine which designations will eventually receive the prospect's gifts.

Manage Funding Types

1. Expand the **Funding Types** section on the opportunity record Details tab.
2. Click **Edit funding types**. The Edit funding types screen appears.



3. Select one or more funding types to associate with the opportunity.

   Note: Only funding types you added to the prospect record associated with the opportunity appear in the list. For information about how to add funding interests to a prospect, see Add Funding Interests on page 1.

4. Click **Save**. You return to the Details tab.

Associated Revenue

You can add and view revenue information associated with the opportunity from the Associated Revenue tab located at the bottom of the Opportunity page.

When you apply a pledge, payment, or grant award to an opportunity or associate existing revenue with an opportunity that has a status of qualified, unqualified, or response pending, the program automatically updates the status to accepted. The amount of the payment appears in the **Revenue**

committed display in the **Opportunity details** section on the Details tab. For qualified and unqualified opportunities, the program automatically updates the ask date and response date to the payment date. For opportunities with a response pending status, the program updates the response date to the payment date.

Add Pledge or Payment to an Opportunity

From the Associated Revenue tab on the Opportunity page, you can add a pledge or payment to the opportunity. Under **Associated revenue**, click **Add** and select the applicable type of revenue transaction. For information about how to add revenue transactions, see the *Revenue Guide*.

Add a Grant Award to an Opportunity

In certain situations, you may pursue funding for a grant program as a major giving opportunity. Or, a major giving prospect may accept an opportunity with the understanding that the gift will be applied to a specific grant program. From the Associated Revenue tab on the Opportunity page, you can add a grant award to the opportunity to track the gift as a grant award. Under **Associated revenue**, click **Add**, **Grant award**. When you add the gift as a grant award, you must add the prospect as a grantor or create a funding request to replace the major giving opportunity. For information about how to add grant awards, see the *Corporate and Foundation Fundraising Guide*.

Add Existing Revenue to an Opportunity

From the Associated Revenue tab on the Opportunity page, you can associate existing revenue to the opportunity. Under **Associated revenue**, click **Add**, **Existing revenue**. The Opportunity Unassociated Revenue Search screen appears. You can enter a constituent to search for revenue that has not been associated with an opportunity. You can limit the search to include just pledges or just donations. You can also mark **Only include revenue with matching designations** to limit the search. Find the revenue item and click **Select**. Once the revenue is associated, it appears on the on the Associated Revenue tab and you can click **Go to revenue** to see more information.

Naming Opportunities

Some organizations use naming opportunities to help with raising funds. Smaller value, higher volume opportunities may include things like bricks in a courtyard or seats in an auditorium. Higher value, lower volume opportunities may include things like buildings or exhibits. Using naming opportunities, you can track information about the opportunities, as well as information about the constituents who take part in the opportunities.

Note: For information about naming opportunities, see the Naming Opportunities chapter in the *Fundraising Guide*.

If your organization uses the **Naming Opportunities** functionality available in *Fundraising*, you can include naming opportunities in a prospect's opportunity record, if you believe the prospect a good potential donor for the naming opportunity.

Add Naming Opportunity

You can associate a prospect with a specific naming opportunity by adding the naming opportunity to the prospect's opportunity record.

Add a naming opportunity to a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.
2. Click **Add**. The Add naming opportunity screen appears.
3. Click the binoculars in the **Naming opportunity** field. The Naming Opportunity for Major Giving Search screen appears.
4. Enter your search criteria and click **Search** to locate an existing naming opportunity record. If the record does not already exist in the system, click **Add** to access the Add a naming opportunity screen.
5. Once you select or add the naming opportunity, you return to the Add naming opportunity screen. Click **Save** to return to the Opportunity page.

Edit Naming Opportunity

You can change any naming opportunity associated with a prospect opportunity. The changes affect the naming opportunity in the system, not just in the selected prospect opportunity.

Edit a naming opportunity from a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.
2. Select the naming opportunity you want to change.
3. Click **Edit**. The Edit naming opportunity screen appears.
4. Make your necessary changes.
5. Click **Save** to save the naming opportunity and return to the Opportunity page.

Add Recognition to a Naming Opportunity

Use the recognition functionality to record specifics on the naming opportunity, including inscription and special request information.

Add recognition information to a naming opportunity from a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.
2. Select the naming opportunity to which you want to add recognition information.
3. Click **Add recognition**. The Add a naming opportunity recognition screen appears.

4. Enter your recognition information.
5. Click **Save** to save the naming opportunity recognition information and return to the Opportunity page. A green checkmark appears in the Recognized column of the Naming opportunities grid.

Campaigns

Campaigns associated with an opportunity display in the **Opportunity campaign** section on the Campaigns tab. In addition, if designations are associated with the opportunity the designations display in the **Designation campaigns** section of the Campaigns tab.

Opportunity Campaigns

This section displays all campaigns currently associated with the opportunity. Campaigns represent your organization's planned efforts to raise money for specific programs or causes.

Designation Campaigns

This section displays all designations and the designation campaigns currently associated with the opportunity. Each designation and the amount related to the designation display in separate sub-sections. The sub-sections display the campaign to which the designation is associated and any campaign subpriority.

Designations represent donor intent and how you intend to use the revenue raised.

Go to Campaign Record

To open a campaign record associated with a designation included in an opportunity, from the opportunity record, select the Campaigns tab. In the **Designation campaigns** grid, click on the campaign you want to open. The campaign record displays, and you can make any necessary changes.

To open a campaign record associated with an opportunity, from the opportunity record, select the Campaigns tab. In the **Opportunity campaigns** grid, select the campaign you want to open and click **Go to campaign**. The campaign record displays, and you can make any necessary changes

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about accessing an opportunity record, see Opportunity Page on page 319.

Edit Campaigns

To change the campaigns associated with the opportunity, in the **Opportunity campaigns** grid of the Campaigns tab, click **Edit campaigns**. The Edit opportunity campaigns screen appears and you can add additional campaigns to the opportunity.

To change a campaign record associated with a designation included in an opportunity, in the **Designation campaigns** grid of the Campaigns tab, expand the campaign you want to edit and click **Edit campaigns**. The Edit opportunity campaigns screen appears and you can add additional campaigns.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about accessing an opportunity record, see Opportunity Page on page 319.

Opportunity Solicitors

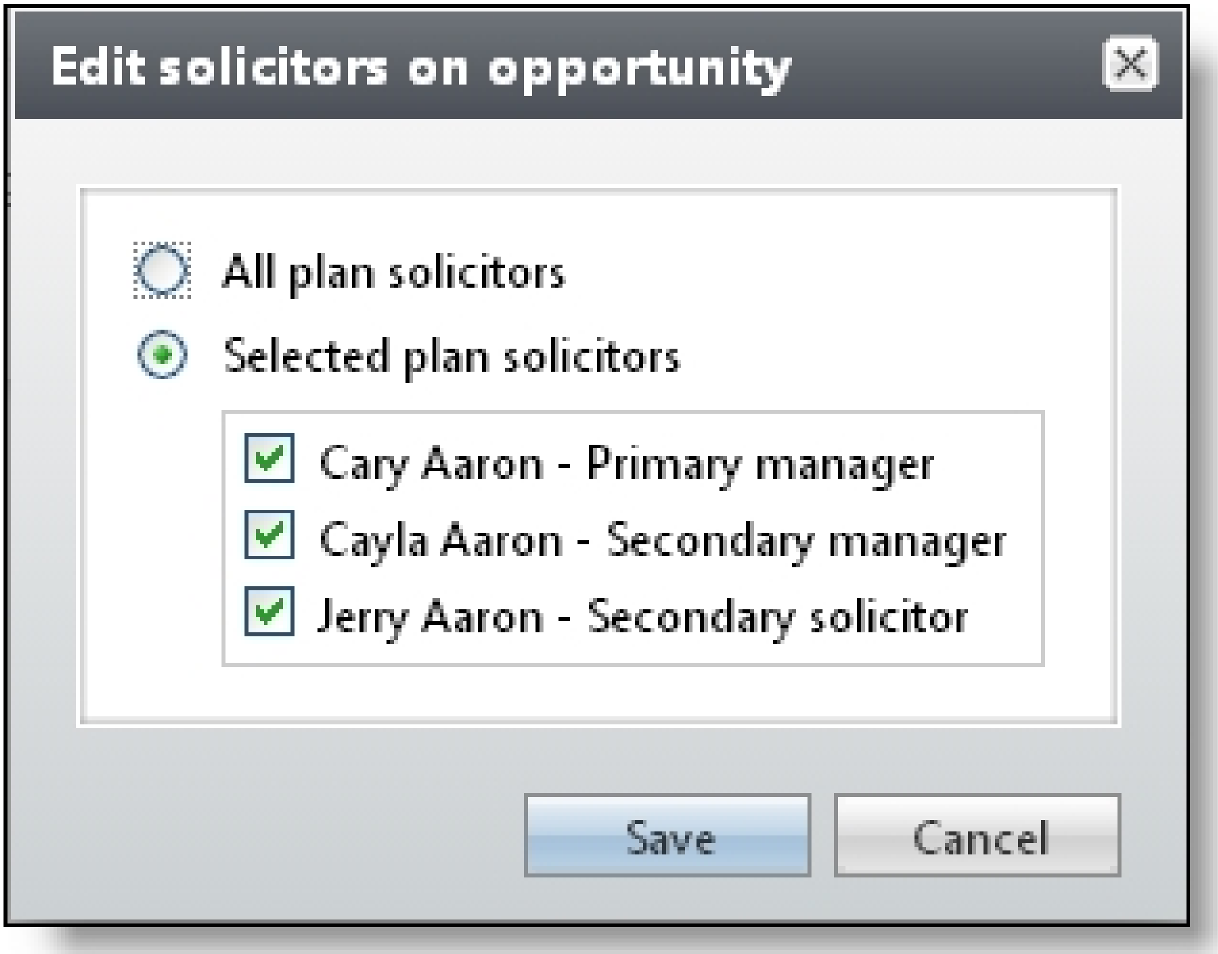
By default, all fundraisers associated with a major giving plan are credited for all revenue raised for every opportunity on the plan. However, if you want to credit individual fundraisers for only the opportunities of which they were a part, you can do so on the Solicitors tab of the Opportunity. This gives your organization the ability to track the revenue individual fundraisers generate in greater detail.

Once you add solicitors to an opportunity, you can view them on the Solicitors tab on the Opportunity page, and in the Opportunity details view on the Plan page. The solicitors and their opportunity totals also display on the Fundraiser and Major Giving Management pages. When the opportunity is linked to revenue, only those solicitors will default onto the revenue.

To assign solicitors to an opportunity, go to the Solicitors tab on the Opportunity page and select **Edit**.

Edit solicitors on opportunities

1. From the Solicitors tab of the Opportunity page, select **Edit**. The Edit solicitors on opportunity appears.



2. The **All plan solicitors** option is marked by default. Keep this option marked if you want all plan solicitors to receive credit for the revenue raised.
3. Mark **Selected plan solicitors** if you want to associate specific solicitors with this opportunity. With this option marked, you can select specific solicitors from the list. All active plan solicitors are displayed.
4. Click **Save** and return to the Solicitors tab.

Edit Opportunity from the Opportunity Page

From an opportunity page, you can edit the existing opportunity information. From the **Tasks** pane on the left side of the screen, click **Edit opportunity**. The Edit opportunity screen appears.

Edit Opportunity Screen Fields

Screen Item	Description
Plan name	Displays the plan associated with this prospect opportunity. You cannot edit the name from this screen.
Status	Status for the selected opportunity: qualified, unqualified, accepted.
Opportunity type	Opportunity types - Outright gift, Corporate gift, Planned gift - are created in **Code tables** in *Administration*.
Expected ask amount	Amount you plan to request from the prospect.
Expected ask date	Date you plan to ask for a gift.
Ask amount	Actual amount you asked for. This field is not activated if the opportunity's **Status** is "Unqualified".
Ask date	Date you asked for the amount enter in the **Ask amount** field.
Likelihood	Rate the likelihood of receiving the entered amount from this prospect: High, Medium, Low.
Accepted amount	Amount the prospect agreed to give. This field is activated only if the opportunity's **Status** is "Accepted".
Response date	Date the prospect agreed to the amount entered in the **Accepted amount** field.
Designation column	Area you intend to use the money (Annual Campaign, Youth Program). Click the binoculars at the end of the field to access the Designation Search screen. From this screen, you can enter a Campaign, Program, Initiative, Project, or Fund to which you want the money designated. You can enter as many designations a necessary in the **Designation** column.
Amount column	Enter the amount of the gift you want allocated to the corresponding designation. For example, if you asked for $100,000 and you enter two designations - Annual Campaign and Endowment Campaign - you can allocate $50,000 to the Annual Campaign by entering this amount in the **Amount** column row that corresponds to the Annual Campaign.
Constituent column	If you are working with a constituent group prospect, you can assign group members to the specific designations, or.if each member of the group is donating a specific amount to the same designation, you can track that information here.
Distribute evenly	Click this button to evenly distribute the amount entered in the **Amount** field among all the selected **Designations**.
Comments	Comments or notes related to the opportunity.

Solicitors and Participants Tab

The Solicitors and Participants on the Plan page includes lists all secondary solicitors associated with the prospect. For group and household constituents, it also displays all members and their roles.

Secondary Solicitors

The **Secondary solicitors** section of the Solicitors and Participants tab lists all secondary solicitors currently assigned the prospect. From this section, you can add, edit, and delete secondary solicitors associated with the plan.

Add a Secondary Solicitor

From the **Secondary solicitors** section of the Solicitors and Participants tab, you can assign fundraisers to the selected prospect. The assignment is immediately committed.

Add a secondary solicitor to a prospect

1. From the Solicitors and Participants tab on the prospect plan, click **Add**. The Add secondary solicitor screen appears.
2. In the **Solicitor** field, click the binoculars to assess the Fundraiser Search screen. From here you can locate the fundraiser you want to assign as the secondary solicitor.
3. You can also enter a role for the new solicitor and a date range defining the solicitor's assignment to the prospect.
4. Click **Save** to save the addition and return to the Solicitors and Participants tab.

Edit a Secondary Solicitor

From the **Secondary solicitors** section of the Solicitors and Participants tab, you can edit any existing fundraisers assignments.

Edit a secondary solicitor prospect assignment

1. From the Solicitors and Participants tab on the prospect plan, in the **Secondary solicitors** section, select the fundraiser you want to edit.
2. Click **Edit**. The Edit secondary solicitor screen appears.
3. In the **Solicitor** field, click the binoculars to assess the Fundraiser Search screen. From here you can locate the new fundraiser you want to assign as the secondary solicitor.
4. You can also change the role of the solicitor and date range defining the solicitor's assignment to the prospect.
5. Click **Save** to save the changes and return to the Solicitors and Participants tab.

Plan Participants

The **Plan participants** section of the Solicitors and Participants tab, list all group members, organization contacts, and other related constituents to be cultivated as part of the plan. From this section you can add, edit, and delete participants and view participant constituent records.

Note: If someone is a plan participant, that plan is listed on the Plans tab of the prospect record. For example, a constituent who is a financial planner may be a participant on the plans of multiple other constituents. The plans for the other constituents appear on the Plans tab of the financial planner, in addition to any of his own plans.

Add Plan Participant

You can add constituents to be contacted as part of this cultivation plan - representatives for the prospect, advisors, influential contacts. This is especially helpful when cultivating groups, but may also prove beneficial with organizations and individual prospects.

Note: If someone is a plan participant, that plan is listed on the Plans tab of the prospect record. For example, a constituent who is a financial planner may be a participant on the plans of multiple other constituents. The plans for the other constituents appear on the Plans tab of the financial planner, in addition to any of his own plans.

Add a plan participant

1. From the Solicitors and Participants tab on the Plan page, in the **Plan participants** section, click **Add**. The Add plan participant screen appears.

2. Select the **Constituent** you want to add. Any related constituent appears in the drop-down menu.
   - Constituent group: members of the group and any relationship directly associated to the group
   - Individual: related constituents
   - Organization: contacts and relationships

   To search for a new constituent to add, click the binoculars to access the search screen. You can then locate the participant you want to add.
3. Enter the new participant's **Role**.

4. Click **Save** to return to the Solicitors and Participants tab. The new participant appears in the **Plan and Participants** section.

Edit Plan Participant

You can edit the list of existing constituents to be contacted as part of this cultivation plan.

Edit plan participant list

1. From the Solicitors and Participants tab on the Plan page, in the **Plan participants** section, select the constituent you want to edit.
2. Click **Edit**. The Edit plan participant screen appears.
3. Select the **Constituent** you want to add. Any related constituent appears in the drop-down menu.
    - Constituent group: members of the group and any relationship directly associated to the group
    - Individual: related constituents
    - Organization: contacts and relationships

    To search for a new constituent to add, click the binoculars to access the search screen. You can then locate the participant you want to add.
4. Enter the participant's **Role**.
5. Click **Save** to return to the Solicitors and Participants tab. The edited participant appears in the **Plan and Participants** section.

Documentation Tab

From the Documentation tab, you can add notes, attachments such as Word documents, and media objects to your plan record.

Planned Gifts Tab

From the Planned Gifts tab you can add planned gift (also known as a deferred gift) to the prospect's opportunity. You can include information specific to numerous types of planned gift vehicles, record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of multiple beneficiaries and relationships for a planned gift. In addition, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets.

For a detailed explanation of this tab, see Planned Gifts Tab on page 281.

Manager History

This tab displays a list of previous primary and secondary managers along with the dates they served as a manager for the plan. Managers displayed on this tab have been replaced as managers through the **Replace primary manager** and **Replace secondary manager** functions.

From this tab, you can edit the dates associated with the manager, go to the manager's Fundraiser page, and delete the manager from the plan record.

Edit Plan Details

From the prospect plan, you can edit the plan name, and change any site or plan type information associated with the plan.

The site information is useful for organizations working out of more than one office. Site designations help track which office is responsible for specific tasks.

Note: You create site options in *Administration*. For more information, see the *Administration Guide*.

To access the Edit prospect plan details screen and make these changes, from the prospect plan, click **Edit plan details** in the **Tasks** frame.

Make a Plan Historical

If you want to remove a plan from use but not delete it from your system, the **Make historical** option in the **Tasks** frame deactivates the plan, removing if from your user's access, but the plan remains in your system, should you need to refer back to it for information or need to reactivate it at some later date.

If after a plan is designated "historical" you want to reactivate it, click the **Make active** link in the **Tasks** frame. This link replaces the **Make historical** link after a plan is designated "historical".

Edit Primary Manager

From the Plan or Fundraiser page, you can change the primary manager information associated with the selected prospect. You can change the dates of the current manager's assignment and change the existing manager. These changes are not recorded on the Manager History tab of the prospect plan.

Edit a prospect plan primary manager

1. From the prospect Plan page, in **Tasks**, select **Edit primary manager** or from the Prospects and Plans tab on a fundraiser record select **Edit**, **Primary manager**. The Edit primary manager screen appears.
2. The existing manager defaults in the **Primary manager** field. You can enter a new manager. Click the binoculars at the end of the field to access a search screen a locate a new manager.
3. Enter a new **Start date** and **End date** for the existing or new manager.
4. Click **Save** to save your changes and return to the Plan or fundraiser page.

These changes are recorded on the Prospect Manager History tab of the prospect record.

Replace Primary Manager

From the Plan or Prospect Research page, you can replace the existing manager. These changes are recorded on the Manager History tab of the prospect plan.

Replace a prospect plan primary manager

1. From the prospect Plan page, in **Tasks**, select **Replace primary manager** or from the Prospects and Plans tab on a fundraiser record select **Replace**, **Primary manager**. The Replace primary manager screen appears.
2. The **Current manager** displays at the top of the screen. If start and end dates are entered for this manager, they default into the **Start date** and **End date** fields in the top half of the screen.
3. You can enter a new **Start date** and/or **End date** for the existing manager.
4. If you want to replace the existing manager, do not enter or edit data in the **Start date** and **End date** fields in the **Current manager information section**. Instead, in the **New manager information** section, in the **New manager** field enter the name of the new primary manager. Click the binoculars at the end of the field to access a search screen a locate a new manager.
5. Today's date defaults in the **Start date** field, designating it the beginning of the new manager's term. You can edit this date. If known, you can enter an **End date**, designating it the end of the new manager's term.
6. Click **Save** to save your changes and return to the Plan or fundraiser page. These changes are recorded on the Manager History tab of the prospect plan.

Edit Secondary Manager

From the Plan or Fundraiser page, you can change the secondary manager information associated with the selected prospect plan. You can change the dates of the current manager's assignment and change the existing manager. These changes are not recorded on the Manager History tab of the prospect plan.

Edit a prospect plan secondary manager

1. From the prospect Plan page, in **Tasks**, select Edit secondary manager or from the Prospects and Plans tab on a fundraiser record select **Edit**, **Secondary manager**. The Edit secondary manager screen appears.
2. The existing manager defaults in the **Secondary manager** field. You can enter a new manager. Click the binoculars at the end of the field to access a search screen a locate a new manager.
3. Enter a new **Start date** and **End date** for the existing or new manager.

4. Click **Save** to save your changes and return to the Plan or fundraiser page. These changes are not recorded on the Manager History tab of the prospect plan.

Replace Secondary Manager

From the Plan or Prospect Research page, you can replace the existing manager. These changes are recorded on the Manager History tab of the prospect plan.

Replace a prospect plan secondary manager

1. From the prospect Plan page, in **Tasks**, select **Replace secondary manager** or from the Prospects and Plans tab on a fundraiser record select **Replace**, **Secondary manager**. The Replace secondary manager screen appears.
2. The **Current manager** displays at the top of the screen. If start and end dates are entered for this manager, they default into the **Start date** and **End date** fields in the top half of the screen.
3. You can enter a new **Start date** and/or **End date** for the existing manager.
4. If you want to replace the existing manager, do not enter or edit data in the **Start date** and **End date** fields in the **Current manager information section**. Instead, in the **New manager information** section, in the **New manager** field enter the name of the new secondary manager. Click the binoculars at the end of the field to access a search screen a locate a new manager.
5. Today's date defaults in the **Start date** field, designating it the beginning of the new manager's term. You can edit this date. If known, you can enter an **End date**, designating it the end of the new manager's term.
6. Click **Save** to save your changes and return to the Plan or fundraiser page. These changes are recorded on the Manager History tab of the prospect plan.

Delete a Plan

If you find you no longer need a plan and you want to permanently remove it from your system, click **Delete plan** under **Tasks**.

Manage Major Giving Opportunities

In *Prospects*, you manage your fundraising operation primarily from **Major giving management**. This area of the program provides quick and comprehensive overviews of the major giving information in your system, which includes dashboards displaying information about steps - planned, pending, completed, canceled, and declined - along with information about your fundraisers, prospects, and opportunities.

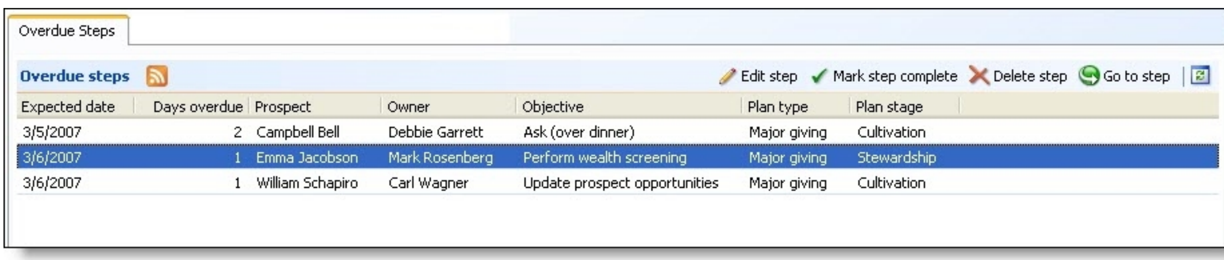
View Major Giving Management

Major giving management pages house information helpful in managing a major giving operation. From these pages, you can view information about steps, fundraisers, prospects, opportunities, and much more.

View Major giving management pages

1. From the *Prospects* drop-down menu, click **Major giving management**, and select the area in **Major giving management** you want to access: Fundraisers and steps, Prospects, or Opportunities. The selected Major giving management screen appears.

   For example, if you selected **Fundraisers and steps**, the Major Giving Management - Manage Fundraisers and Steps screen appears.



2. From the Mange Fundraisers and Steps page, you can do the following:
   - Manage Overdue Steps on page 334
   - View Steps Planned on page 343
   - View Steps Completed on page 344
   - Manage Canceled/Declined Steps on page 339
   - Manage Fundraisers on page 345
3. From the Opportunities and Asks page, you can do the following:
   - Track Major Giving Opportunities and Asks on page 348
   - View Opportunities Page on page 351
4. From the Prospects page, you can do the following:
   - View Prospect Plans in Pipeline on page 362
   - Manage Unassigned Prospects on page 364
   - Manage Prospects with No Recent Steps on page 366

Manage Fundraisers and Steps

From the Manage Fundraisers and Steps page, you can keep track of steps fundraisers have planned with prospects, steps the fundraiser completed with prospects, overdue steps, and track fundraisers in your system.

Manage Overdue Steps

The Overdue Steps tab tracks steps not marked “completed” by the assigned **Expected date**. The grid displays the **Expected date**, number of **Days overdue**, **Prospect** name, fundraiser responsible for the step (**Owner**), **Objective** of the step, **Plan type**, and **Plan stage**.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

You can select to view overdue steps assigned to members of your team or specific fundraisers. If you select **Only show steps owned by this fundraiser**, the results include only steps the fundraiser owns and excludes any steps on which the fundraiser appears as an additional solicitor. You can also limit the results to a specific date range and site.

Edit Overdue Step

From the Overdue Steps tab in **Major giving management**, you can edit a selected overdue prospect step.

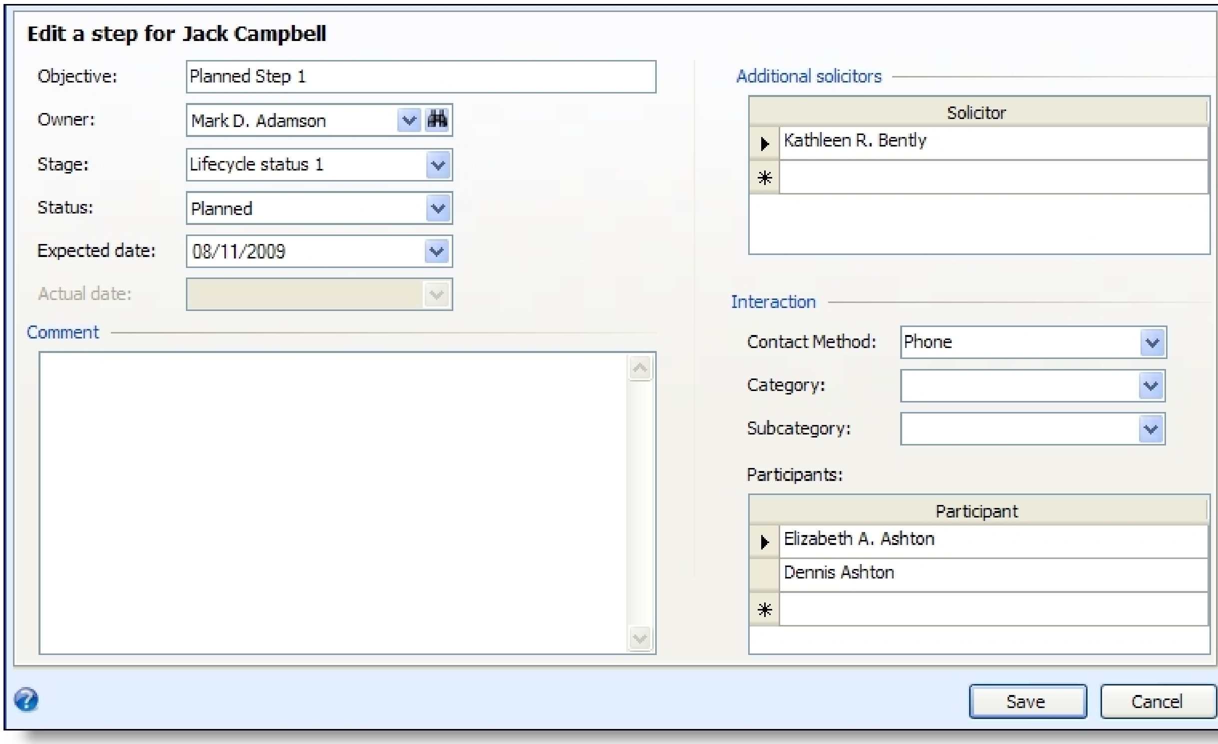
Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

Edit overdue prospect steps from Major giving management

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Overdue Steps tab.

   Note: For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

2. From the grid, select the step you want to edit.
3. Click **Edit step**. The Edit a step screen appears.



4. Make any necessary changes.

   For information about the items on this screen, see Edit a Step Screen on page 335.

5. Click **Save** to save the information and return to the Overdue Steps tab.

Edit a Step Screen

From the Edit a step screen, you can change information regarding steps planned between your fundraiser and prospect.

Mark Overdue Step Complete

From the Overdue Steps tab in **Major giving management**, you can mark a selected overdue prospect step as "Complete".

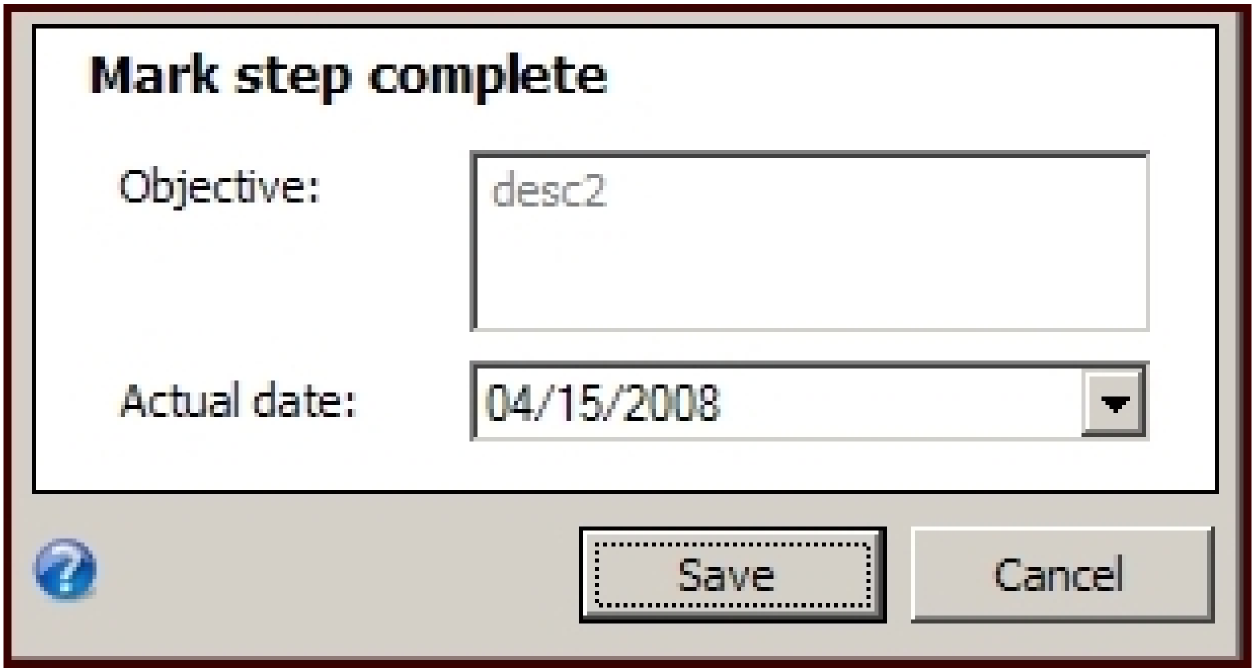
Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

Mark an overdue step "complete" from Manage major giving

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Overdue Steps tab.

   Note: For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

2. From the grid, select the step you want to mark as complete.
3. Click **Mark step complete**. The Mark step complete screen appears.



4. In the **Date** field, today's date defaults. If the completion date is different from today's date, enter the date on which the step was completed.
5. Click **Save** to save the information and return to the Overdue Steps tab.

Mark Step Complete Screen

From this screen, you can change the status of a step to "Complete"

Screen Item	Description
Objective	Purpose for the step.
Date	Date the step took place.

Delete Overdue Step

You can easily delete overdue steps from your system.

Delete overdue steps from Major giving management

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Overdue Steps tab.

Note: For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

2. Select the step you want to delete.
3. Click **Delete step**. A confirmation screen appears.
4. Click **Yes** to delete the step.

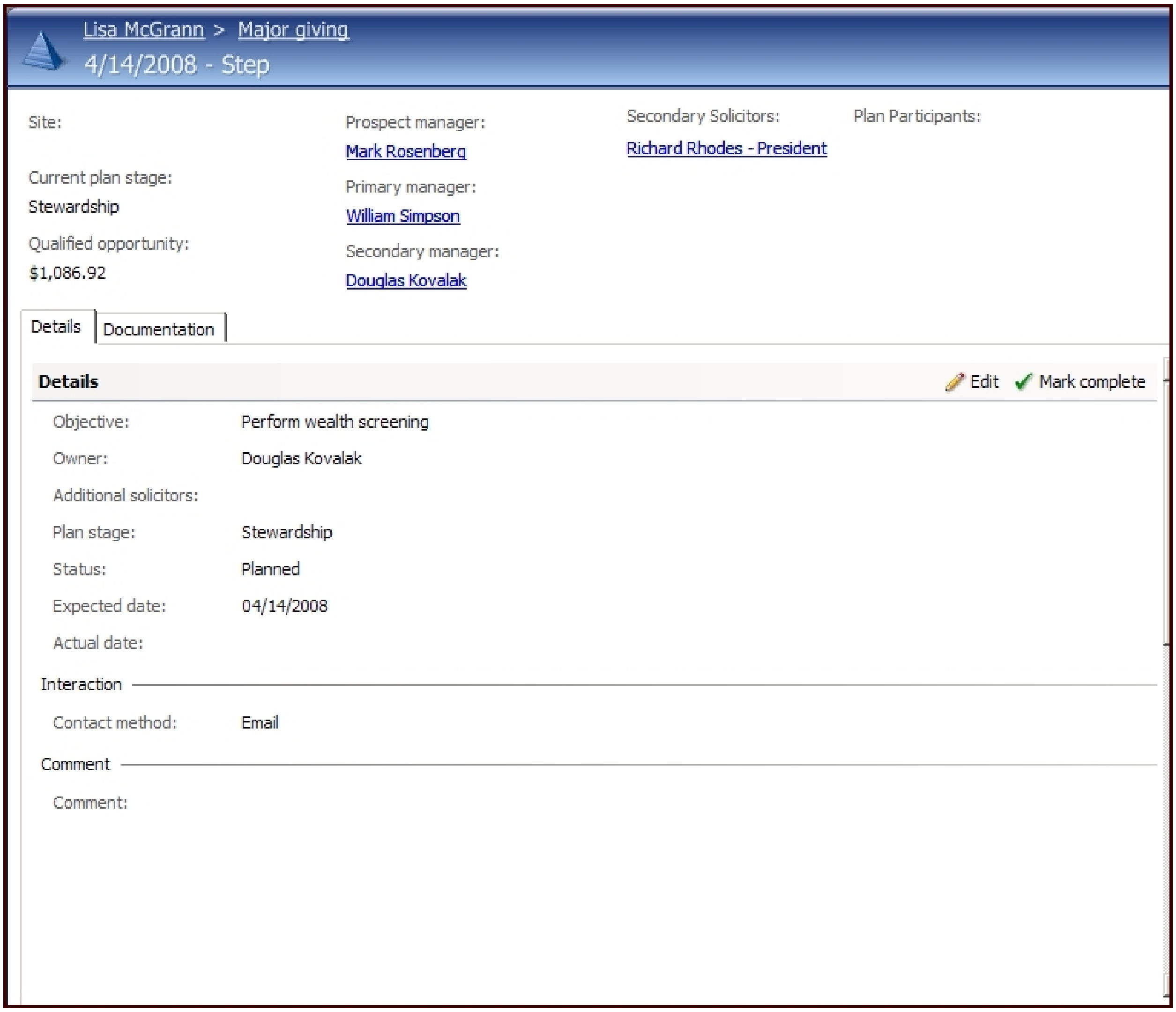
View Overdue Steps

You can view selected overdue steps. From the step, you can also enter comments, edit the step, and mark the step complete.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

View steps

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Overdue Steps tab.
2. Select the step you want to view.
3. Click **Go to step**. The Step page appears, displaying details of the selected step.



The top of the step page, displays information about the step, such as the plan's stage and management information.

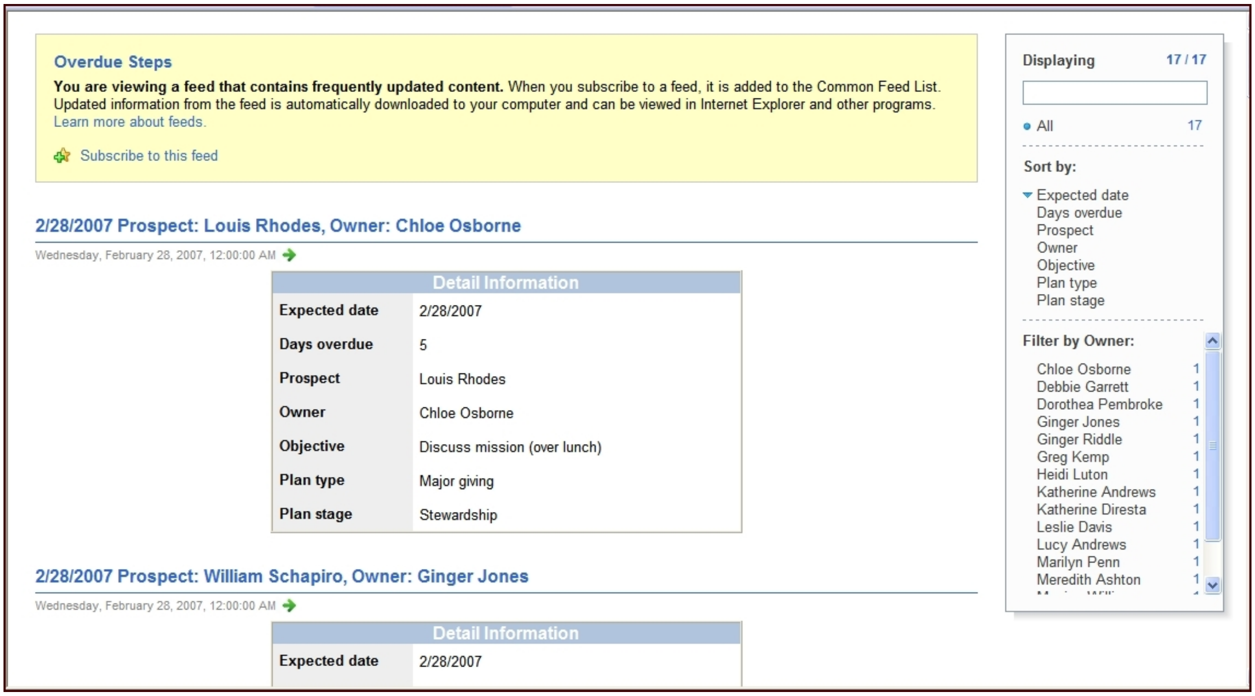
The bottom half of the step page, includes two tabs.

4. To return to the Fundraiser and Steps page, click **Back**.

Manage RSS Feed

With the **View RSS feed** button included on the Overdue Steps tab, data consumers can monitor overdue step information without logging in and running the program.

Simply click the **View RSS feed** link on the tab. The overdue steps included on the tab are displayed in the dashboard format in your Web browser.



Provide the Web page address to your data customers. They can then subscribe to the feed, adding it to their **Microsoft Feeds** list and generate up-to-date overdue step data from their Web browser at any time.

Manage Canceled/Declined Steps

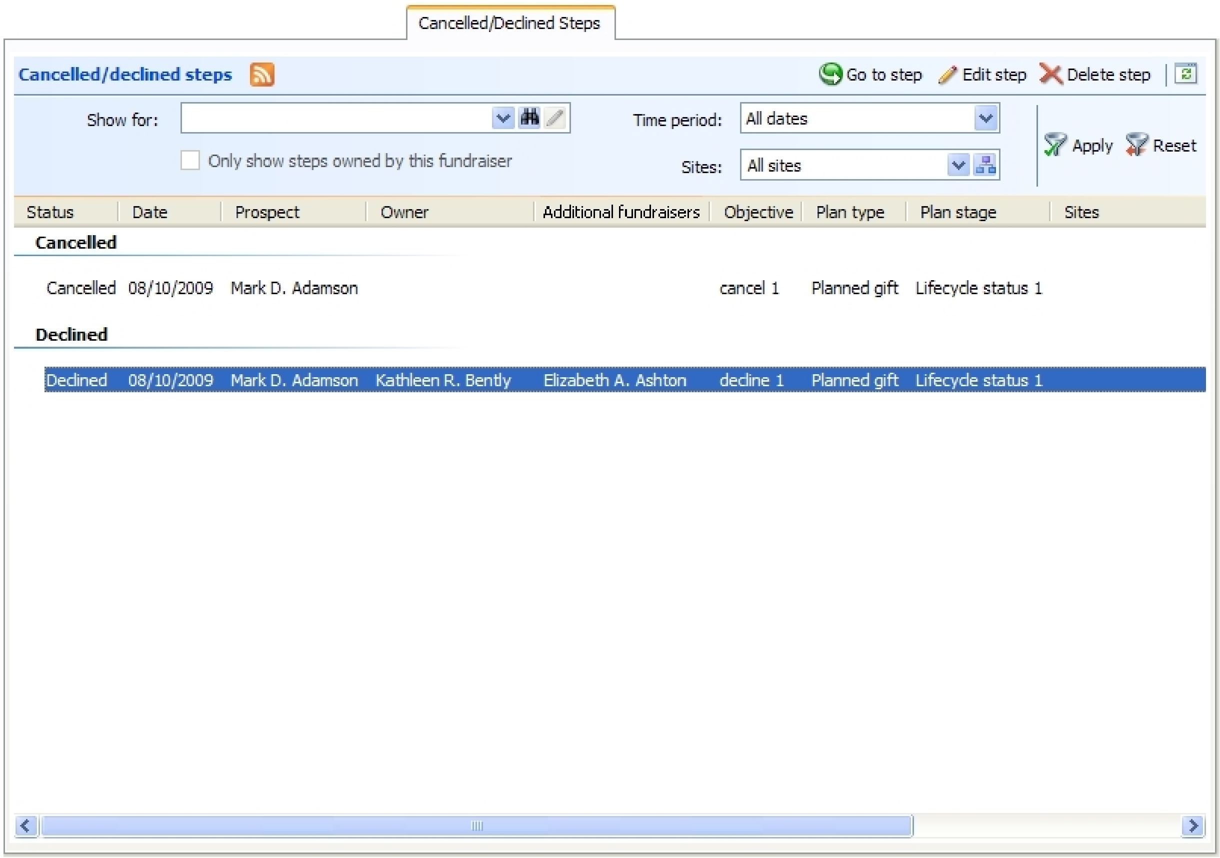
The Canceled/Declined Steps tab tracks steps that have been canceled or declined. The grid displays the **Status**, **Date**, **Prospect** name, **Owner** responsible for the step, **the Fundraiser (solicitor associated with the step), Objective** of the step, **Plan type**, **Plan stage**, and the **Sites** associated with the step.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

If you can access multiple sites, use the **Sites** field to filter and select the sites to view. Steps associated with sites you can access appear in the grid. For information about site security, see the Sites and Site Security chapter of the *Security Guide*.

Note: You can select sites for a prospect plan from the Plans tab of a prospect record. For more information about creating plans, see Prospect Plans on page 313.

You can select to view overdue steps assigned to members of your team or specific fundraisers. If you select **Only show steps owned by this fundraiser**, the results include only steps the fundraiser owns and excludes any steps on which the fundraiser appears as an additional solicitor. You can also limit the results to a specific date range and site.



Edit Canceled/Declined Step

From the Canceled/Declined Steps tab in **Major giving management**, you can edit a selected canceled or declined prospect step.

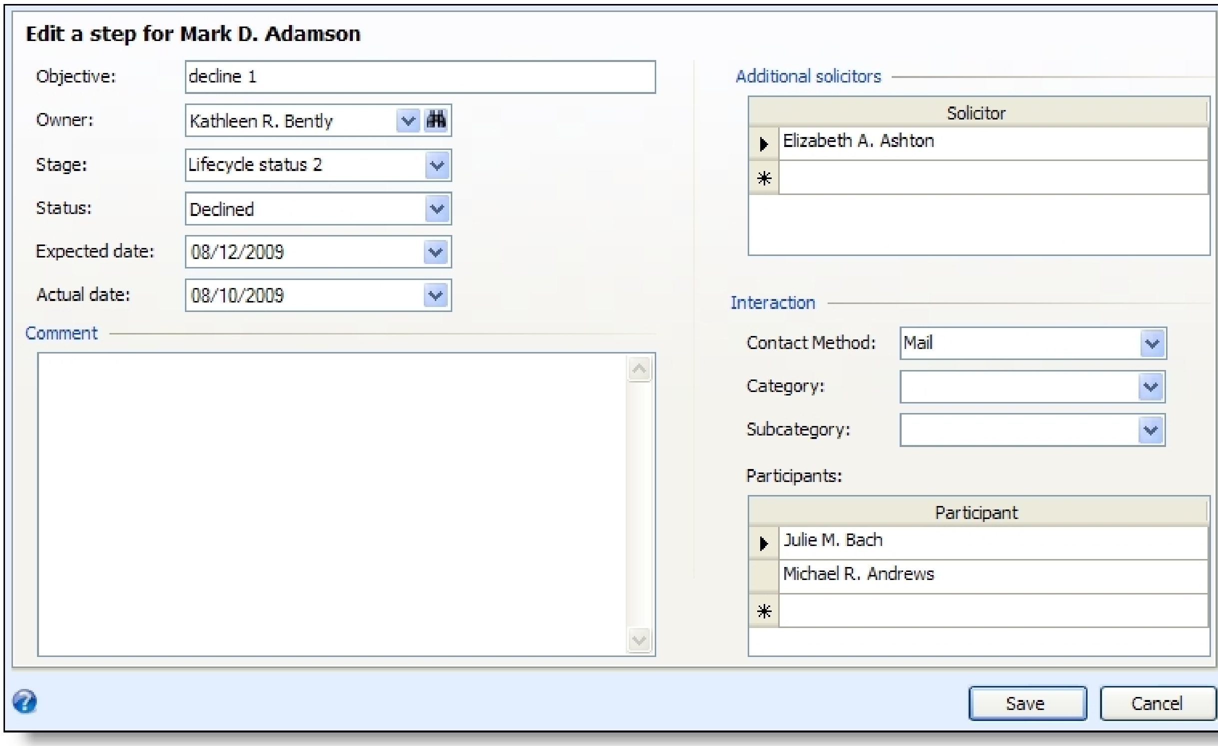
> ***Note:*** Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

Edit canceled or declined prospect steps from Major giving management

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Canceled/Declined Steps tab.

   > ***Note:*** For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

2. From the grid, select the step you want to edit.
3. Click **Edit step**. The Edit a step screen appears.



4. Make any necessary changes.

   For information about the items on this screen, see Edit a Step Screen on page 341.

5. Click **Save** to save the information and return to the Canceled/Declined Steps tab.

Edit a Step Screen

From the Edit a step screen, you can change information regarding steps planned between your fundraiser and prospect.

Screen Item	Description
Objective	The purpose for the step.
Owner	Click the binoculars to access the Search screen and assign a fundraiser to the step.
Stage	Select the stage for this step: cultivation, solicitation
Status	Select the status: completed, not completed.
Expected date	Enter the date you expect the step to take place.
Actual date	If you change the status of the step to “Completed,” you can enter the date the step occurred.
Comment	Enter any additional information you want to include with the step.

Screen Item	Description
Additional solicitors	Enter any additional solicitors to assign to the step. These solicitors also receive credit for the step.
Interaction	Enter the contact method to use for this step. You can also select a category or subcategory.
Participants	Enter all prospects that will participate in this step. This is especially helpful if you are working with a constituent group prospect.

Delete Canceled/Declined Step

You can easily delete canceled or declined steps from your system.

Delete canceled or declined steps from Major giving management

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Canceled/Declined Steps tab.

Note: For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

2. Select the step you want to delete.
3. Click **Delete step**. A confirmation screen appears.
4. Click **Yes** to delete the step.

View Canceled/Declined Steps

You can view selected canceled or declined steps. From the step you can view details, such as prospect and primary manager and you can edit the step.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

View steps

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Canceled/Declined Steps tab.
2. Select the step you want to view.
3. Click **Go to step**. The Step page appears, displaying details of the selected step.

   The top of the step page, displays information about the step, such as the plan’s stage and management information.

   The bottom half of the step page, includes two tabs.
4. To return to the Fundraisers and Steps page, click **Back**.

Manage RSS Feed

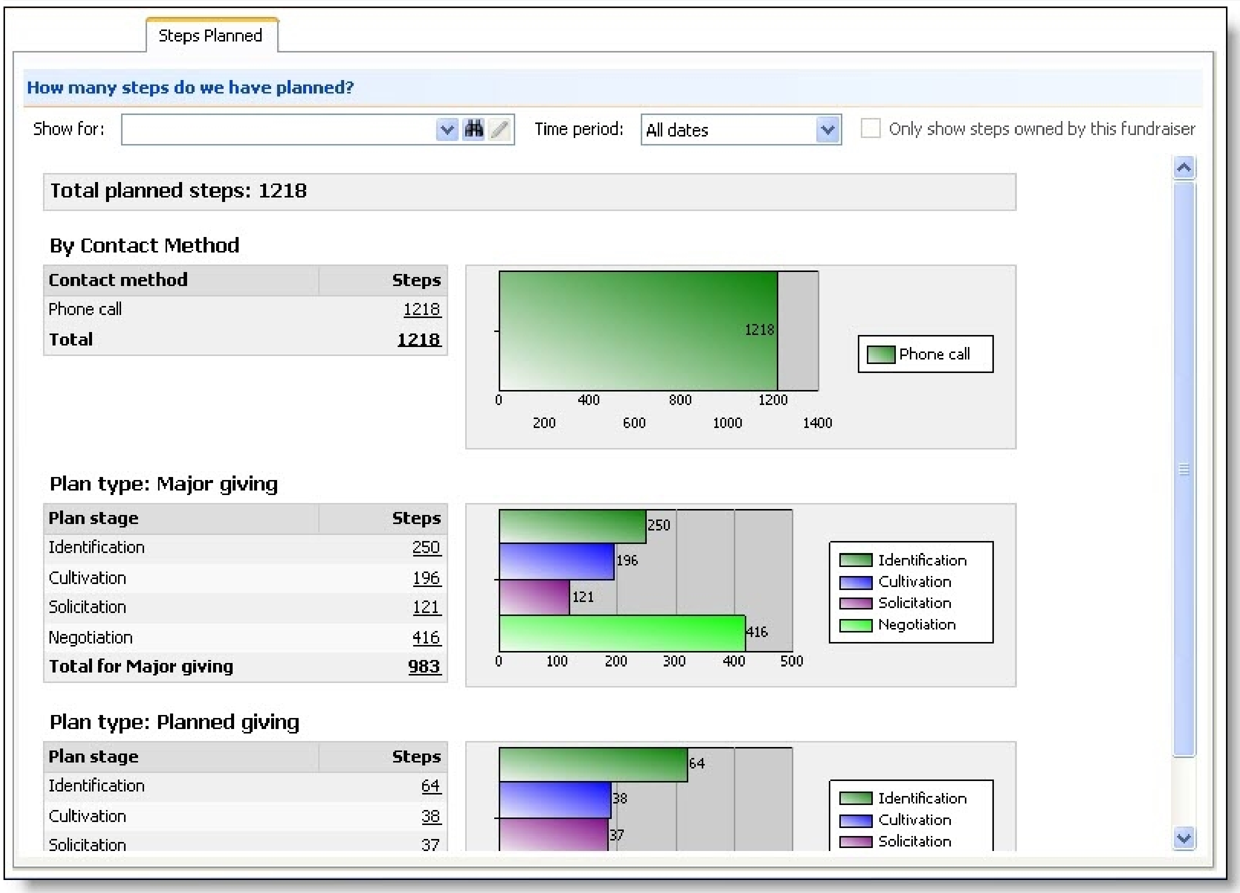
With the **View RSS feed** button included on the Canceled/Declined Steps tab, data consumers can monitor canceled or declined step information without logging in and running the program.

You can view RSS feeds from both the Overdue Steps tab and Canceled/Declined Steps tab. For more information about viewing RSS feeds, see Manage RSS Feed on page 338.

View Steps Planned

The Steps planned tab tracks information about upcoming prospect steps, including overdue steps, using the data displayed in the grids on the left side of the screen and graphically on the right side of the screen.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.



You can select to view planned steps assigned to members of your team or specific fundraisers. If you select **Only show steps owned by this fundraiser**, the results include only steps the fundraiser owns and excludes any steps on which the fundraiser appears as an additional solicitor. You can also limit the results to a specific date range.

The first grid and graph display planned steps based on the step type (meeting, phone call). Any additional grids and graphs display planned steps based on the plan assigned to the step. For example, if your organization planned steps for both major giving and planned giving plan types, a grid and graph appears for each plan. If your organization planned steps for just major giving, only one grid and graph appear for major giving.

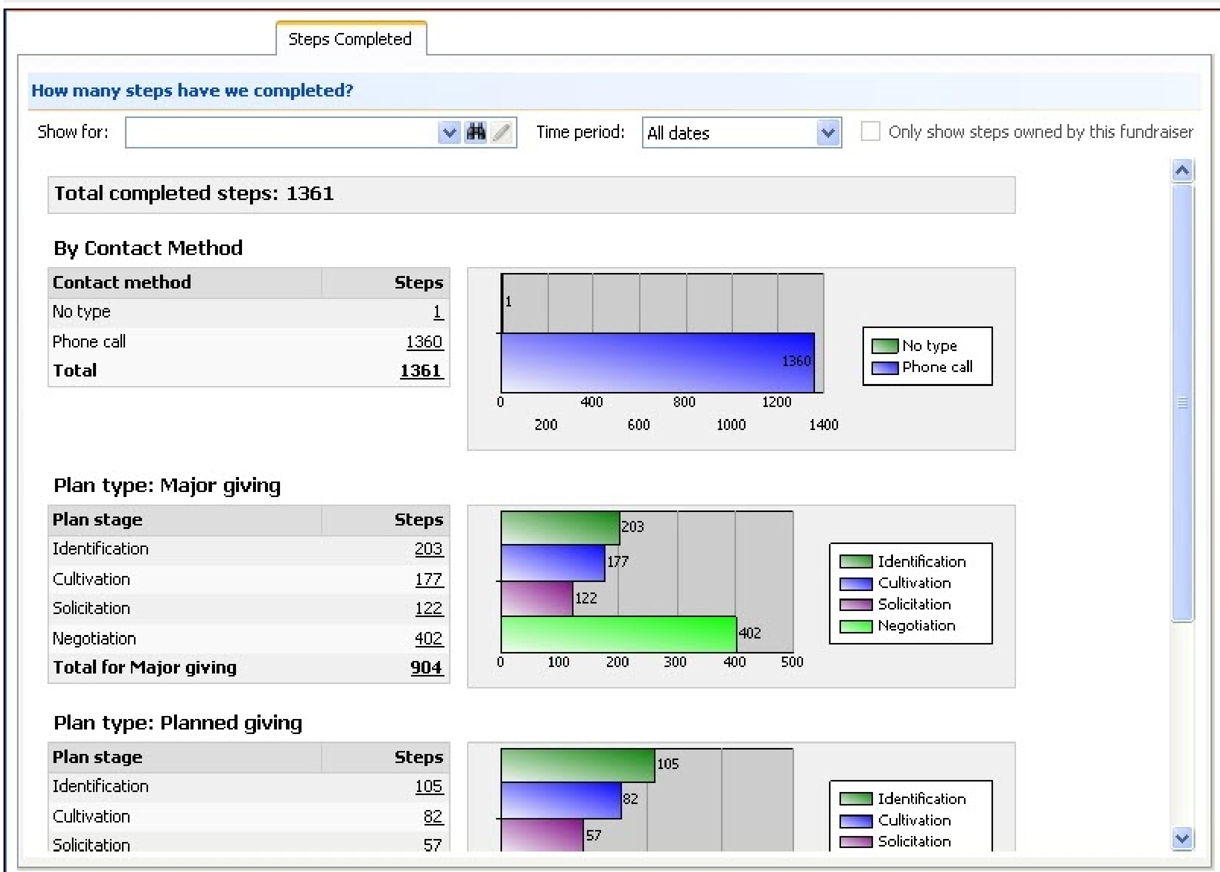
To see information about a specific step, click the number link in the **Steps** column. The Prospect Steps page appears. For more information about the Prospect Steps page, see Track Prospect Steps on page 346.

Note: For more information about plans, see Prospect Plans on page 313.

View Steps Completed

The Steps Completed tab tracks information about completed prospect steps both statistically - using the data displayed in the grids on the left side of the screen - and graphically.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.



You can select to view completed steps assigned to members of your team or specific fundraisers. If you select **Only show steps owned by this fundraiser**, the results include only steps the fundraiser owns and excludes any steps on which the fundraiser appears as an additional solicitor. You can also limit the results to a specific date range.

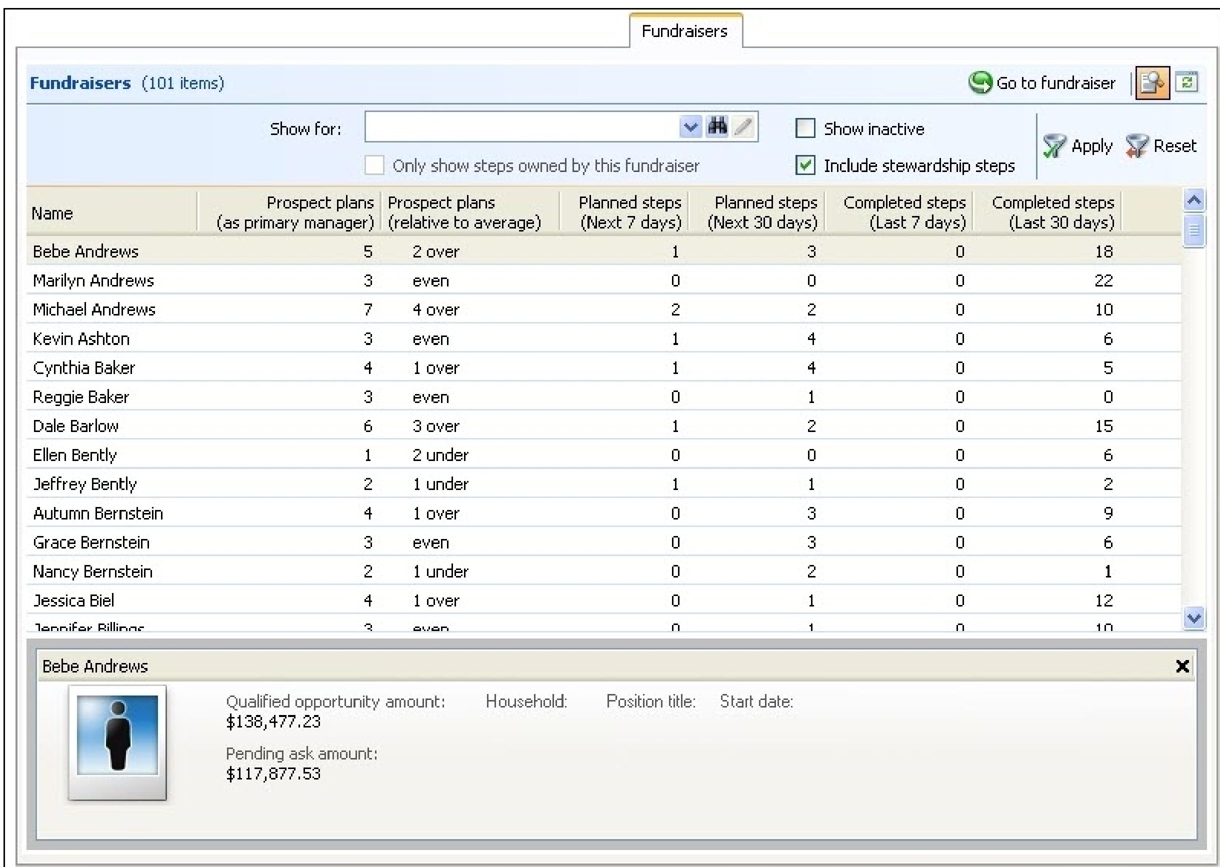
The first grid and graph display completed steps based on the step type (meeting, phone call). Any additional grids and graphs display completed steps based on the plan. For example, if your organization completed steps for both major giving and planned giving plans, a grid and graph appears for each plan. If your organization completed steps for just the major giving plan, only one grid and graph appear for major giving.

To see information about a specific step, click the number link in the **Steps** column. The Prospect Steps page appears. For more information about the Prospect Steps page, see Track Prospect Steps on page 346.

Note: For more information about plans, see Prospect Plans on page 313.

Manage Fundraisers

The Fundraisers tab on the Major giving management - Manage Fundraisers and Steps page houses information about all fundraisers working in **Major Giving**.



You can select to view prospect plan steps assigned to members of your team or specific fundraisers. If you select **Only show steps owned by this fundraiser**, the results include only steps the fundraiser owns and excludes any steps on which the fundraiser appears as an additional solicitor. To include stewardship plan steps in the results, select **Include stewardship steps**. To include steps that were marked inactive, select **Show inactive**. The Fundraisers grid displays the fundraiser's name, the number of prospect plans to which the fundraiser is assigned, the fundraiser's number of planned steps for the next seven days and the next 30 days, and the fundraiser's completed steps for the pervious seven days and the previous 30 days.

View Fundraiser Records

From a fundraiser, you can view the status of a fundraiser's various assignments. For example, you can see how many prospects the fundraiser has in the pipeline, the number of steps completed, the number of steps planned, and more.

Security settings established by your system administrator determine which users can assess a fundraiser.

View a fundraiser from Major giving management

1. From the Major giving management - Manage Fundraisers and Steps page in *Prospects*, select the Fundraisers tab.

Note: For information about accessing the Major giving management - Manage Fundraisers and Steps page, see View Major Giving Management on page 333.

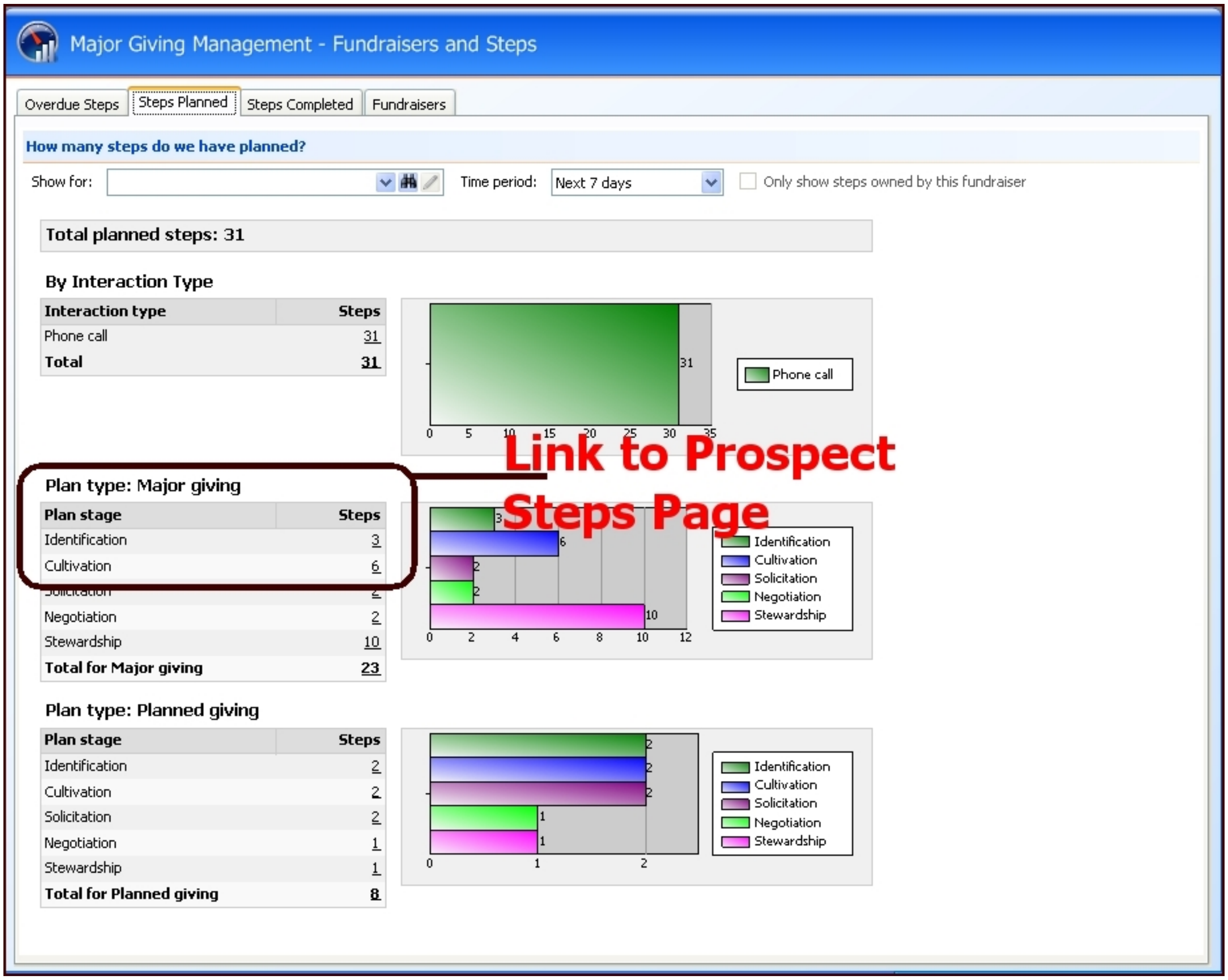
2. In the grid, select the fundraiser you want to view.
3. Click **Go to fundraiser**. The fundraiser appears.

Track Prospect Steps

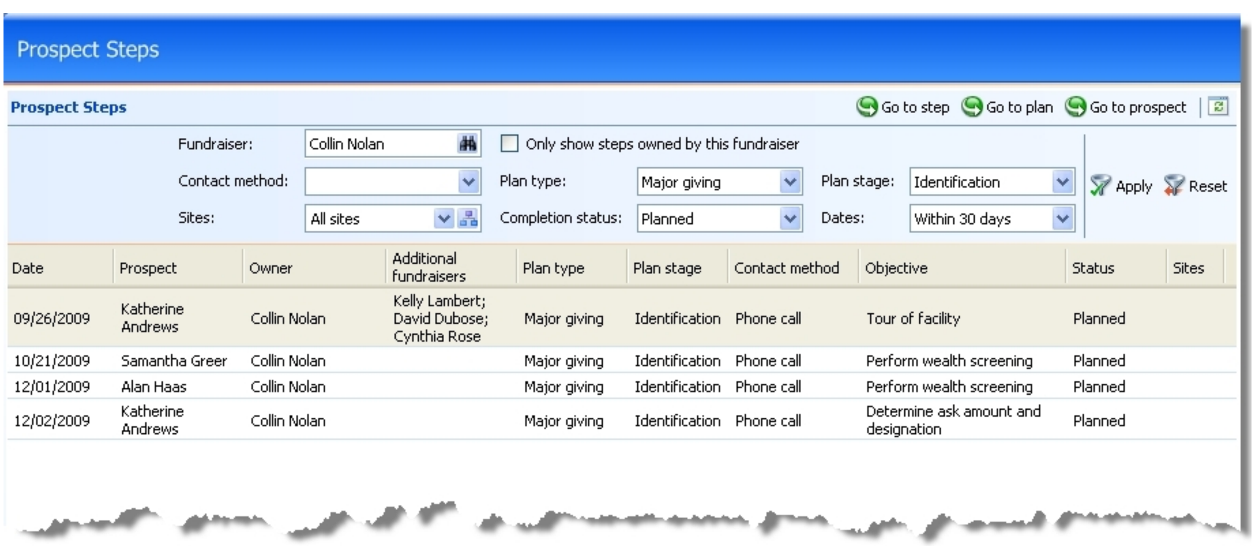
The Prospect Steps page displays detailed information about prospect steps. For example, in **Major giving management**, if you access the Prospect Steps page by clicking in the **Identification** row of the **Plan type: Major Giving** grid on the Steps Planned tab, the Prospect Steps page displays all planned prospect steps in the "Identification" stage of the Major Giving plan. From the Prospect Steps page, you can then further refine your results based on the assigned fundraiser, dates, etc.

View prospect steps

1. From the Major Giving Management - Fundraisers and Steps page in *Prospects*, select either the Steps Planned or Steps Complete tab
2. Click the number link in the **Steps** column. For example, on the Steps planned tab, you want to view a list of prospects in the "Identification" stage of the Major Giving plan. In the **Plan type: Major giving** grid, click the number displayed in the **Steps** column of the **Identification** row.



The Prospect Steps page appears, listing all planned prospect steps in the "Identification" stage of the Major Giving plan.



3. You can further filter the steps displayed based on the following:

- **Fundraiser** (steps owned only or steps owned and steps assigned to as additional solicitor)
- **Contact method** (phone call, meeting)
- **Sites**
- **Plan type**
- **Completion status**
- **Plan stage**
- **Dates**

4. If you enter filtering information, click **Apply** to update the page. To return to the original page settings, click **Reset**.
5. To view a step, select the step in the grid and click **Go to step**. The selected step opens.
6. To view a plan, select a step associated to the **Plan type** you wish to view and click **Go to plan**. The selected plan opens.
7. To view a prospect, select a step associated to the **Prospect** you wish to view and click **Go to prospect**. The selected prospect opens.

Track Major Giving Opportunities and Asks

From **Major giving management** in *Prospects*, you can track all opportunities for your organization to ask for a gift. Opportunities are designated by your organization and based on criteria established in your plan outline, determining when you should ask a prospect for a donation and how much to request. From the Opportunities and Asks page in **Major giving management**, you can track opportunities and asks; overdue, outstanding, completed, and accepted ask amounts; and much more.

Summary Information

From the Summary tab, you can keep track of the following information:

Note: This information is accessed by selecting **Major giving management** from the *Prospects* drop-down menu, and clicking “Opportunities”. The Opportunities and Asks page appears, displaying the Summary tab

- **Organizational team**: If your organization uses teams, you can select an **Organizational team** on which to base the opportunity summary. Teams are created in **Manage Organization Hierarchy** in *Administration*. For more information, see the *Administration Guide*.
- **Plan type**: To filter the summary information based on a specific plan, such as a major giving plan or a planned gift, in the **Plan type** field select the plan you want to use. The summary information updates and displays data specific to the selected plan.
- **Overdue**: The number of overdue asks and responses displays in this frame along with the amount of money the overdue items represent.

To view a list of the overdue asks, click the number displayed in the **Overdue ask** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the overdue ask.

To view a list of overdue responses, click the number displayed in the **Overdue responses** field. The Opportunities page appears. From this page you can access the prospect, plan, and opportunity associated with the overdue response.

- **Completed**: In the **Show for** field, select the time period for which you want to view completed opportunity information. The number of accepted and rejected ask displays along with the amount of money represented by each. Total data is also displayed.

To view a list of the accepted asks, click the number displayed in the **Accepted** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the accepted ask.

To view a list of the rejected asks, click the number displayed in the **Rejected** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the rejected ask.

To view a list of the total completed asks, click the number displayed in the **Total** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the selected completed ask.

- **Qualified and response pending**: In the **Show for** field, select the time period for which you want to view qualified/response pending opportunity information. The number of qualified/response pending ask displays along with the amount of money represented by each. Total data is also displayed.

To view a list of qualified asks, click the number displayed in the **Qualified** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the qualified ask.

To view a list of the response-pending asks, click the number displayed in the **Response pending** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the ask.

To view a list of the asks associated with total revenue committed, click the number displayed in the **Total revenue committed** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the ask.

To view a list of the asks associated with the total amount paid, click the number displayed in the **Total paid** field. The Opportunities page appears. From this page, you can access the prospect, plan, and opportunity associated with the ask.

Opportunities by Amount Range

Note: This information is accessed by selecting **Major giving management** from the *Prospects* drop-down menu, and clicking “Opportunities”. The Opportunities and Asks page appears, displaying the Summary tab. Select the Opportunities by Amount Range tab.

The Opportunities by Amount Range tab displays ask opportunities and the various gift ranges associated with the asks based on the selected criteria.

- **Show for**: Select an organizational team for which you want to view information. Teams are created in **Manage Organization Hierarchy** in *Administration*. For more information, see the *Administration Guide*.

- **Time period**: You can view information for a variety of time periods, including Next 12 months and Next 7 days.
- **Plan type**: Filter information based on the Plan type associated with the opportunity ask.
- **Statuses**: Filter information based on the status associated with the opportunity ask. You can select as many status options as apply.
- **Selected Likelihoods**: Limit the results to opportunities based on selected likelihood percentages.

In the grid under the graph, the following information displays:

- **Amount Range:** Set up in Major Giving Setup
- **Likelihood**: Displays the likelihood associated with each opportunity in an amount range. The dashboard uses the percentage associated with the likelihoods you selected on the Likelihoods to include screen to calculate the projected revenue for each amount range. For example, if you have a likelihood of "Excellent" that corresponds to a 100% likelihood, you expect to receive the full amount that appears in the **Amount** column for these entries.
- **Amount:** For opportunities that have a defined:

  Expected ask amount, but no Ask amount or no Accepted amount

  Ask amount, but no Accepted amount

  Accepted amount
- Number of opportunities: The number of opportunities included in the **Amount range** and **Amount**. Click the number link in this column to access the Opportunities page. For more information about this page, see View Opportunities Page on page 351.
- **Projected revenue**: Amount expected based on the likelihood percentage assigned to the opportunities in the corresponding amount range. The projected revenue amount equals the **Amount** column entry times the likelihood percent. For example, you have ten opportunities in the $1,000 - $5,000 range with a 50% likelihood assigned. The total ask amount for these opportunities is $40,000. However, since the opportunities have only a 50% likelihood of being fulfilled, the projected revenue amount is $20,000.

Opportunity Pyramid

The Opportunity Pyramid tab tracks opportunities and asks in a pyramid, based on the filtering criteria you select.

- **Show for**: Select the type of opportunity you want represented on the pyramid. For example, you can select "All" and all opportunities - accepted, qualified, pending - are included. Or you can select a specific opportunity type.
- **Organizational team**: Select an organizational team for which you want to view information. Teams are created in **Manage Organization Hierarchy** in *Administration*. For more information, see the *Administration Guide*.

Reconcile Opportunities

When you create an opportunity for a major giving prospect, you specify the status and the expected ask amount. If the opportunity has a status of "Accepted," you must also select a designation. You will apply any revenue made toward the opportunity to the selected designation. For opportunities with a status other than "Accepted," you are not required to enter a designation. When you receive a pledge or a payment for an opportunity that does not have a designation specified, the opportunity appears on the Reconcile Opportunities tab. From this tab, you can select the entry to reconcile and click **Edit opportunity**. From the Edit opportunity screen, you can enter a designation for the opportunity. Click **Save** to update the opportunity and remove the entry from the **Reconcile opportunities** grid.

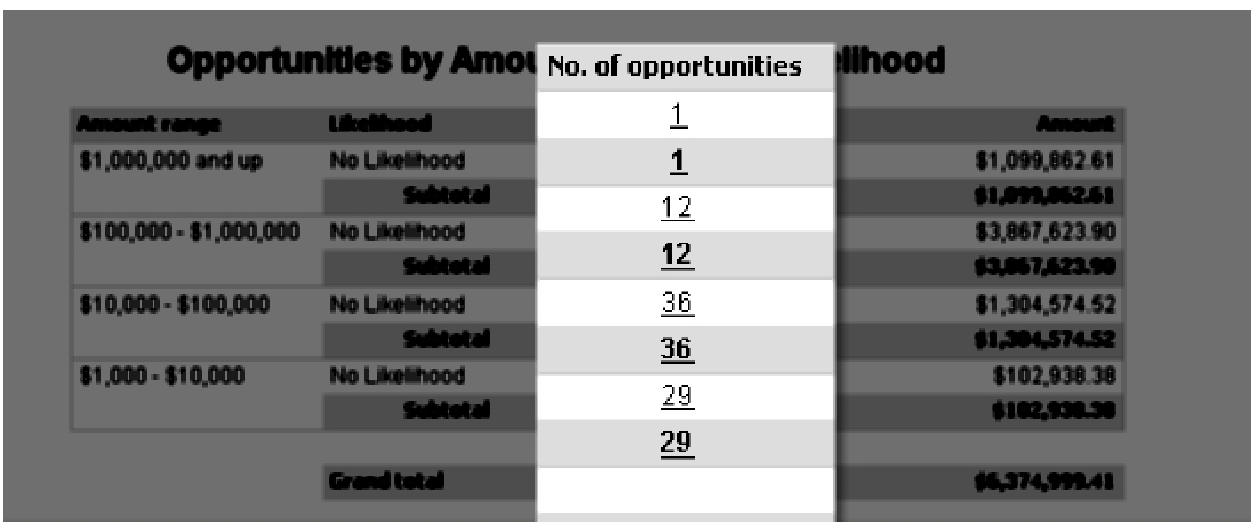
View Opportunities Page

The Opportunities page lists all opportunities in your system. You can filter the opportunities displayed based on **Plan type**, **Status**, or **Dates**. For example, if you want to view only opportunities associated with your major giving plan, in the **Plan type** field, select "Major Giving"; if you want to view "Unqualified" opportunities, in the **Status** field, select "Unqualified". After you select your criteria, click the **Apply** button to update your view.

You can access the Opportunities page from the Major Giving Management - Opportunities and Asks page. Both the Summary and Opportunities by Amount Range tabs provide links.

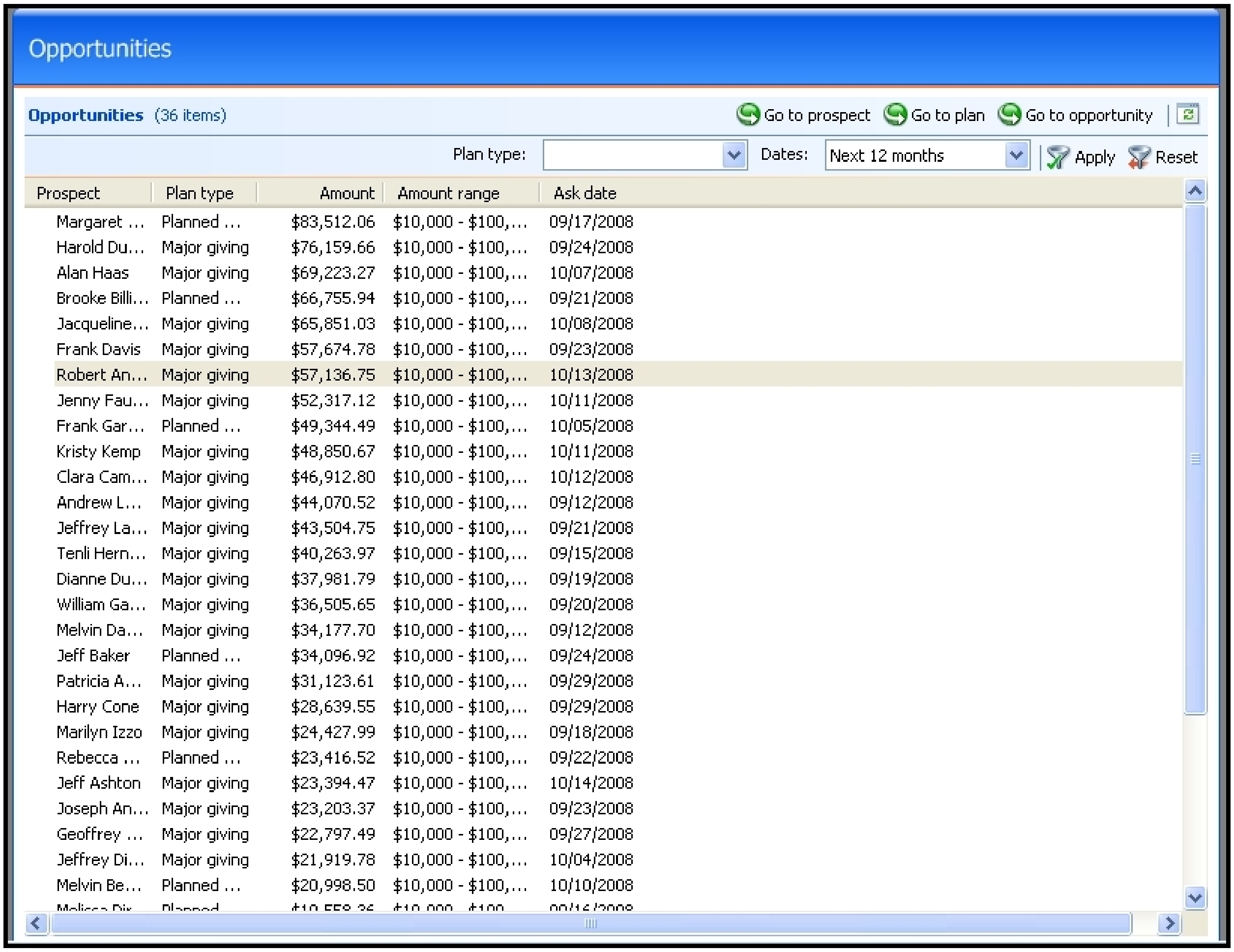
From the Summary tab, click any number link provided in the various frames to view a list of opportunities associated with the frame in which the number is housed. For example, if you want to view a list of all overdue ask opportunities, click the number link in the **Overdue asks** field of the **Overdue** frame.

From the Opportunities by Amount Range tab, in the grid near the bottom of the tab, in the **No. of opportunities** column, click the number link in the row corresponding with the information you want to view.



The Opportunities page appears. For information about working on this page, see Opportunities Page on page 352.

Note: For information about accessing **Major giving management**, see View Major Giving Management on page 333.



Prospect	Plan type	Amount	Amount range	Ask date
Margaret ...	Planned ...	$83,512.06	$10,000 - $100,...	09/17/2008
Harold Du...	Major giving	$76,159.66	$10,000 - $100,...	09/24/2008
Alan Haas	Major giving	$69,223.27	$10,000 - $100,...	10/07/2008
Brooke Billi...	Planned ...	$66,755.94	$10,000 - $100,...	09/21/2008
Jacqueline...	Major giving	$65,851.03	$10,000 - $100,...	10/08/2008
Frank Davis	Major giving	$57,674.78	$10,000 - $100,...	09/23/2008
Robert An...	Major giving	$57,136.75	$10,000 - $100,...	10/13/2008
Jenny Fau...	Major giving	$52,317.12	$10,000 - $100,...	10/11/2008
Frank Gar...	Planned ...	$49,344.49	$10,000 - $100,...	10/05/2008
Kristy Kemp	Major giving	$48,850.67	$10,000 - $100,...	10/11/2008
Clara Cam...	Major giving	$46,912.80	$10,000 - $100,...	10/12/2008
Andrew L...	Major giving	$44,070.52	$10,000 - $100,...	09/12/2008
Jeffrey La...	Major giving	$43,504.75	$10,000 - $100,...	09/21/2008
Tenli Hern...	Major giving	$40,263.97	$10,000 - $100,...	09/15/2008
Dianne Du...	Major giving	$37,981.79	$10,000 - $100,...	09/19/2008
William Ga...	Major giving	$36,505.65	$10,000 - $100,...	09/20/2008
Melvin Da...	Major giving	$34,177.70	$10,000 - $100,...	09/12/2008
Jeff Baker	Planned ...	$34,096.92	$10,000 - $100,...	09/24/2008
Patricia A...	Major giving	$31,123.61	$10,000 - $100,...	09/29/2008
Harry Cone	Major giving	$28,639.55	$10,000 - $100,...	09/29/2008
Marilyn Izzo	Major giving	$24,427.99	$10,000 - $100,...	09/18/2008
Rebecca ...	Planned ...	$23,416.52	$10,000 - $100,...	09/22/2008
Jeff Ashton	Major giving	$23,394.47	$10,000 - $100,...	10/14/2008
Joseph An...	Major giving	$23,203.37	$10,000 - $100,...	09/23/2008
Geoffrey ...	Major giving	$22,797.49	$10,000 - $100,...	09/27/2008
Jeffrey Di...	Major giving	$21,919.78	$10,000 - $100,...	10/04/2008
Melvin Be...	Planned ...	$20,998.50	$10,000 - $100,...	10/10/2008

Opportunities Page

From the Opportunities page, you can filter the opportunities based on the following:

- **Plan type**
- **Status**

If you enter filtering information, click **Apply** to update the page. To return to the original page settings, click **Reset**.

View Prospect from Opportunities Page

To view a prospect, select the **Prospect** you wish to view and click **Go to prospect**. The selected prospect opens.

View Plan Information from Opportunities page

To view a plan associated with an opportunity, select the **Plan type** you wish to view and click **Go to plan**. The selected plan opens. For more information about plan records, see Prospect Plans on page 313.

View Fundraising Opportunity from Opportunities Page

To view an opportunity, select the opportunity in the grid and click **Go to opportunity**. The selected opportunity opens. An overview of the amounts, designations, and associated revenue appears.

Prospect Opportunity Page

The Opportunity page displays details about a selected prospect opportunity, including designation information, and any associated revenue, naming opportunities, and campaigns. You access this page by clicking **Go to opportunity** on the Opportunities page. For information about accessing the Opportunities page, see View Opportunities Page on page 351.

Edit Opportunity from the Opportunity Page

From an opportunity page, you can edit the existing opportunity information. From the **Tasks** pane on the left side of the screen, click **Edit opportunity**. The Edit opportunity screen appears.

Edit Opportunity Screen Fields

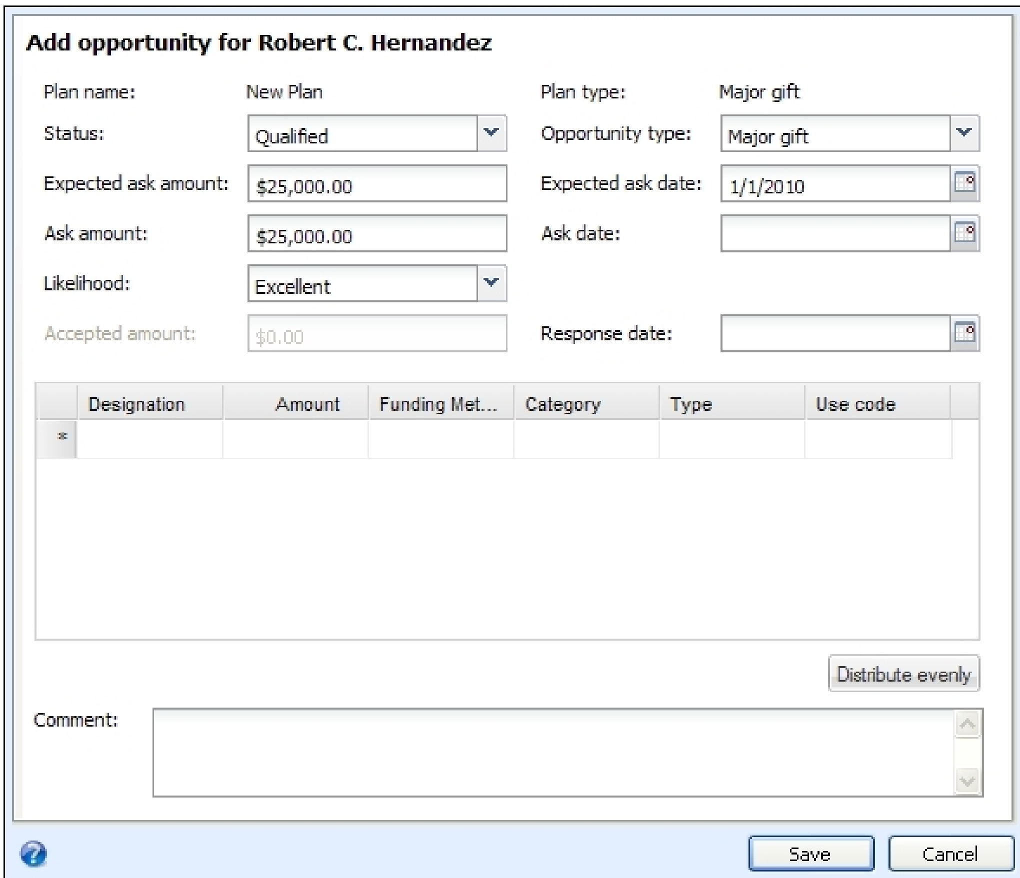
Screen Item	Description
Plan name	Displays the plan associated with this prospect opportunity. You cannot edit the name from this screen.
Status	Status for the selected opportunity: qualified, unqualified, accepted.
Opportunity type	Opportunity types - Outright gift, Corporate gift, Planned gift - are created in **Code tables** in *Administration*.
Expected ask amount	Amount you plan to request from the prospect.
Expected ask date	Date you plan to ask for a gift.
Ask amount	Actual amount you asked for. This field is not activated if the opportunity's **Status** is "Unqualified".
Ask date	Date you asked for the amount enter in the **Ask amount** field.
Likelihood	Rate the likelihood of receiving the entered amount from this prospect: High, Medium, Low.
Accepted amount	Amount the prospect agreed to give. This field is activated only if the opportunity's **Status** is "Accepted".
Response date	Date the prospect agreed to the amount entered in the **Accepted amount** field.
Designation column	Area you intend to use the money (Annual Campaign, Youth Program). Click the binoculars at the end of the field to access the Designation Search screen. From this screen, you can enter a Campaign, Program, Initiative, Project, or Fund to which you want the money designated. You can enter as many designations a necessary in the **Designation** column.
Amount column	Enter the amount of the gift you want allocated to the corresponding designation. For example, if you asked for $100,000 and you enter two designations - Annual Campaign and Endowment Campaign - you can allocate $50,000 to the Annual Campaign by entering this amount in the **Amount** column row that corresponds to the Annual Campaign.
Constituent column	If you are working with a constituent group prospect, you can assign group members to the specific designations, or.if each member of the group is donating a specific amount to the same designation, you can track that information here.
Distribute evenly	Click this button to evenly distribute the amount entered in the **Amount** field among all the selected **Designations**.
Comments	Comments or notes related to the opportunity.

Add an Opportunity

From the Opportunities tab of the Plan page, you can add information about opportunities to help you better track prospect steps and gift requests.

Add an ask opportunity from a prospect

1. On the Plan page, select the Opportunities tab.
2. Click **Add**. The Add opportunity screen appears.



3. Enter the necessary information.
4. Click **Save** to save the opportunity and return to the Plan page.

Add or Edit Opportunity Screen Fields

Screen Item	Description
Plan name	Displays the plan associated with this prospect opportunity. You cannot edit the name from this screen.
Status	Status for the selected opportunity: qualified, unqualified, accepted.
Opportunity type	Opportunity types - Outright gift, Corporate gift, Planned gift - are created in **Code tables** in *Administration*.
Expected ask amount	Amount you plan to request from the prospect.
Expected ask date	Date you plan to ask for a gift.
Ask amount	Actual amount you asked for. This field is not activated if the opportunity's **Status** is "Unqualified".
Ask date	Date you asked for the amount enter in the **Ask amount** field.
Likelihood	Rate the likelihood of receiving the entered amount from this prospect: High, Medium, Low.
Accepted amount	Amount the prospect agreed to give. This field is activated only if the opportunity's **Status** is "Accepted".
Response date	Date the prospect agreed to the amount entered in the **Accepted amount** field.
Designation column	Area you intend to use the money (Annual Campaign, Youth Program). Click the binoculars at the end of the field to access the Designation Search screen. From this screen, you can enter a Campaign, Program, Initiative, Project, or Fund to which you want the money designated. You can enter as many designations a necessary in the **Designation** column.
Amount column	Enter the amount of the gift you want allocated to the corresponding designation. For example, if you asked for $100,000 and you enter two designations - Annual Campaign and Endowment Campaign - you can allocate $50,000 to the Annual Campaign by entering this amount in the **Amount** column row that corresponds to the Annual Campaign.
Constituent column	If you are working with a constituent group prospect, you can assign group members to the specific designations, or.if each member of the group is donating a specific amount to the same designation, you can track that information here.
Distribute evenly	Click this button to evenly distribute the amount entered in the **Amount** field among all the selected **Designations**.
Comments	Comments or notes related to the opportunity.

Delete Opportunity

From an opportunity page, you can delete the opened opportunity. From the **Tasks** pane on the left side of the screen, click **Delete opportunity**. A confirmation screen appears. Click **Yes** to remove the opportunity from your system.

Details Tab

The Details tab of the prospect Opportunity page displays information about the Opportunity and any designations (annual campaign, building fund, camp program) associated with the opportunity.

Opportunity Details

This display-only section of the Details tab houses status, amount, date, and other pertinent information associated with the prospect's opportunity.

Designation

This section of the Details tab displays any designations associated with the prospect opportunity.

Designations represent donor intent and track how you intend to use the revenue associated with the designation. Designations can also be associated with campaigns to track performance toward a goal. You can manage designations from one central location—the Designation Hierarchies page. From *Fundraising*, select **Designation Hierarchies** to view this page. For more information, see the *Fundraising Guide*.

Go to Designation

From the Designation section of the Details tab on the prospect's Opportunity page, you can access any designation associated with the opportunity. From the grid, select the designation you want to access. Click **Go to designation**. The Designation page appears. For more information about working with Designations, see the *Fundraising Guide*.

Associated Revenue Tab

You can add and view revenue information associated with the opportunity from the Associated revenue tab located at the bottom of the Opportunity page.

Add Pledge or Payment to an Opportunity

From the Associated Revenue tab on the Opportunity page, you can add a pledge or payment to the opportunity. Click the drop-down menu under **Add** and select revenue option. The Add a payment or Add a pledge screen appears, depending on which add option you selected.

For information about adding pledges and payments, see the *Revenue Guide*.

Go to a Revenue Record from an Opportunity

From the Associated Revenue tab on the Opportunity page, you can access any revenue record associated with the opportunity by selecting revenue item in the grid and clicking **Go to revenue**.

For information about adding pledges and payments, see the *Revenue Guide*.

Naming Opportunities

Some organizations use naming opportunities to help with raising funds. Smaller value, higher volume opportunities may include things like bricks in a courtyard or seats in an auditorium. Higher value, lower volume opportunities may include things like buildings or exhibits. Using naming opportunities, you can track information about the opportunities, as well as information about the constituents who take part in the opportunities.

Note: For information about naming opportunities, see the Naming Opportunities chapter in the *Fundraising Guide*.

If your organization uses the **Naming Opportunities** functionality available in *Fundraising*, you can include naming opportunities in a prospect's opportunity record, if you believe the prospect a good potential donor for the naming opportunity.

Add Naming Opportunity

You can associate a prospect with a specific naming opportunity by adding the naming opportunity to the prospect's opportunity record.

Add a naming opportunity to a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.

   Note: For information about accessing the prospect's Opportunity page, see Prospect Opportunity Page on page 353.

2. Click **Add**. The Add naming opportunity screen appears.
3. Click the binoculars in the **Naming opportunity** field. The Naming Opportunity for Major Giving Search screen appears.
4. Enter your search criteria and click **Search** to locate an existing naming opportunity record. If the record does not already exist in the system, click **Add** to access the Add a naming opportunity screen.
5. Once you select or add the naming opportunity, you return to the Add naming opportunity screen. Click Save to add the naming opportunity to the prospect opportunity record and return to the Opportunity page.

Naming Opportunity for Major Giving Search

Screen Item	Description
Name	You can enter the whole and partial name information.
Type	Type of item the name will appear on - building, bench, brick.
Campaign	Campaign associated with the naming opportunity.
Fundraising purpose	Fundraising purpose associated with the naming opportunity.
Area	Geographic location of the naming opportunity.
Unit	Department or unit location of the naming opportunity.
Facility	Building or campus of the naming opportunity.
Minimum gift amount	Enter the minimum amount range you are interested in.
Add	Opens the Add a naming opportunity screen. You can add a new naming opportunity to associate with the prospect opportunity.
Search screen	Locate the record you want to use from this screen. Enter the criteria on which you want to base your search. Complete as many fields as you like, and you do not have to completely fill in any field. Click **Search** to start the search. All records satisfying your criteria appear in the Results grid in the bottom half of the screen. Select the record you want, and click **Select**.

Edit Naming Opportunity

You can change any naming opportunity associated with a prospect opportunity. The changes affect the naming opportunity in the system, not just in the selected prospect opportunity.

Edit a naming opportunity from a prospect opportunity record

1. From the prospect’s Opportunity page, select the Naming Opportunities tab.

> ***Note:*** For information about accessing the prospect’s Opportunity page, see Prospect Opportunity Page on page 353.

2. Select the naming opportunity you want to change.
3. Click **Edit**. The Edit naming opportunity screen appears.
4. Make your necessary changes.
5. Click **Save** to save the naming opportunity and return to the Opportunity page.

Delete Naming Opportunity

You can delete naming opportunities from a prospect opportunity record.

Delete a naming opportunity from a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.

Note: For information about accessing the prospect's Opportunity page, see Prospect Opportunity Page on page 353.

2. Select the naming opportunity you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to remove the naming opportunity and return to the Opportunity page.

Add Recognition

Use the recognition functionality to record specifics on the naming opportunity, including inscription and special request information.

Add recognition information to a naming opportunity from a prospect opportunity record

1. From the prospect's Opportunity page, select the Naming Opportunities tab.

Note: For information about accessing the prospect's Opportunity page, see Prospect Opportunity Page on page 353.

2. Select the naming opportunity to which you want to add recognition information.
3. Click **Add recognition**. The Add a naming opportunity recognition screen appears.
4. Enter your recognition information.
5. Click **Save** to save the naming opportunity recognition information and return to the Opportunity page. A green checkmark appears in the Recognized column of the Naming opportunities grid.

Go to Naming Opportunity Record

Click this button to access the Naming Opportunity record. For information about the naming opportunity record, see the Naming Opportunities chapter in the *Fundraising Guide*.

Campaigns

Campaigns associated with an opportunity display in the **Opportunity campaign** section on the Campaigns tab. In addition, if designations are associated with the opportunity the designations display in the **Designation campaigns** section of the Campaigns tab.

Opportunity Campaigns

This section displays all campaigns currently associated with the opportunity. Campaigns represent your organization's planned efforts to raise money for specific programs or causes. You can associate multiple designations with a campaign.

Designation Campaigns

This section displays all designations currently associated with the opportunity. Designations represent donor intent and how you intend to use the revenue raised.

Go to Campaign Record

To open a campaign record associated with a designation included in an opportunity, from the opportunity record, select the Campaigns tab. In the **Designation campaigns** grid, select the campaign you want to open and click **Go to campaign**. The campaign record displays, and you can make any necessary changes.

To open a campaign record associated with an opportunity, from the opportunity record, select the Campaigns tab. In the **Opportunity campaigns** grid, select the campaign you want to open and click **Go to campaign**. The campaign record displays, and you can make any necessary changes

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about accessing an opportunity record, see Prospect Opportunity Page on page 353.

Edit Campaigns

To change the campaigns associated with the opportunity, in the **Opportunity campaigns** grid of the Campaigns tab, click **Edit campaigns**. The Edit opportunity campaigns screen appears and you can add additional campaigns to the opportunity.

To change a campaign record associated with a designation included in an opportunity, in the **Designation campaigns** grid of the Campaigns tab, click **Edit campaigns**. The Edit opportunity campaigns screen appears and you can add additional campaigns.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about accessing an opportunity record, see Prospect Opportunity Page on page 353.

Manage Major Giving Prospects

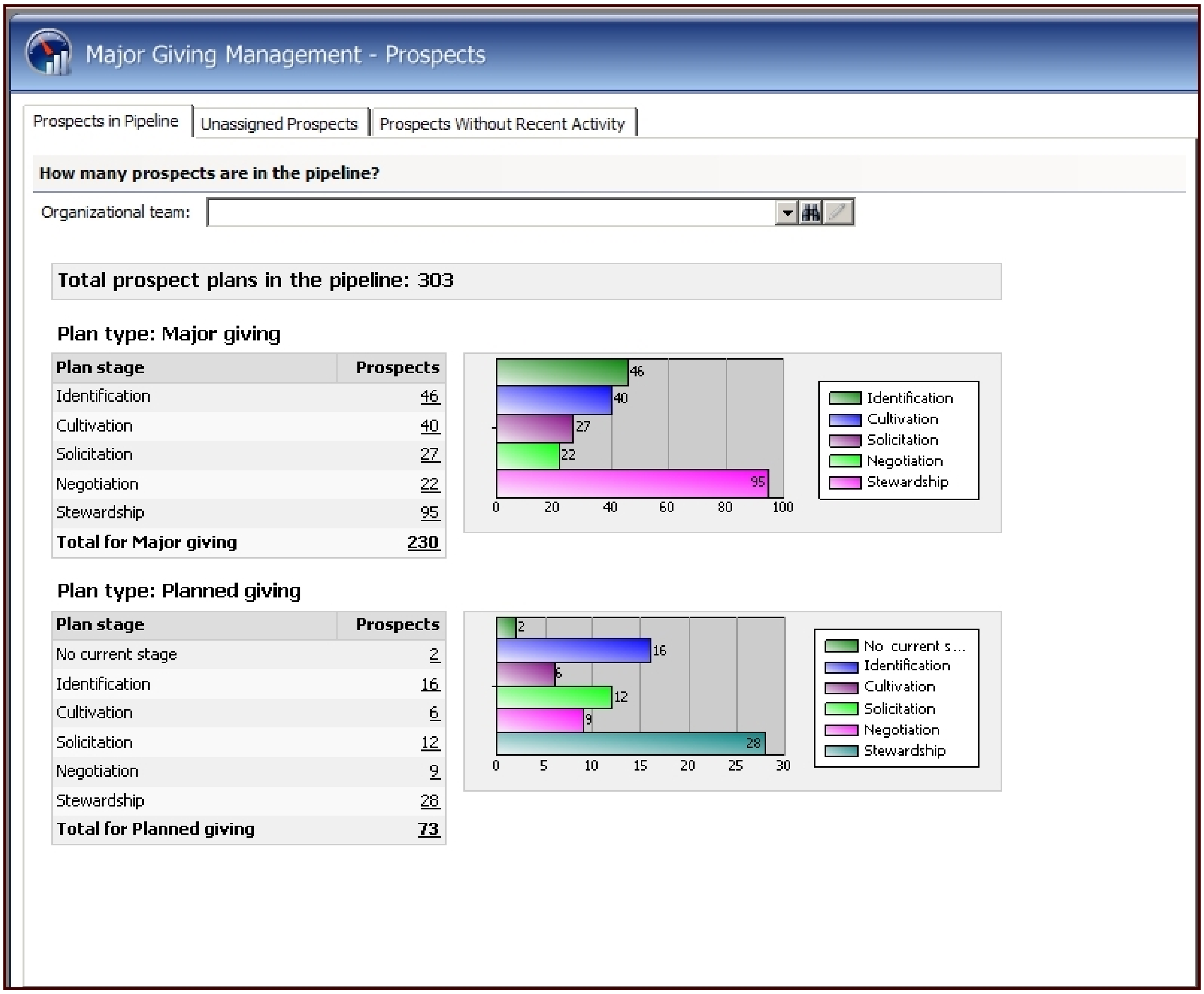
The Major giving management - Prospects page houses detailed information about the prospects in your system: how many prospect plans are currently in the *Prospects* pipeline, prospects that have not yet been assigned to a fundraiser, and prospects that have no recent steps recorded.

View Prospect Plans in Pipeline

The prospect plan pipeline displays the total number of prospect plans currently in the pipeline along with a breakdown of prospects based on plan types. The breakdown displays the number of prospects at each plan stage for each plan type. You can also access the Prospects page from here. The Prospects page lists all prospect names and allows you to open a selected prospect’s record.

View the prospect plan pipeline

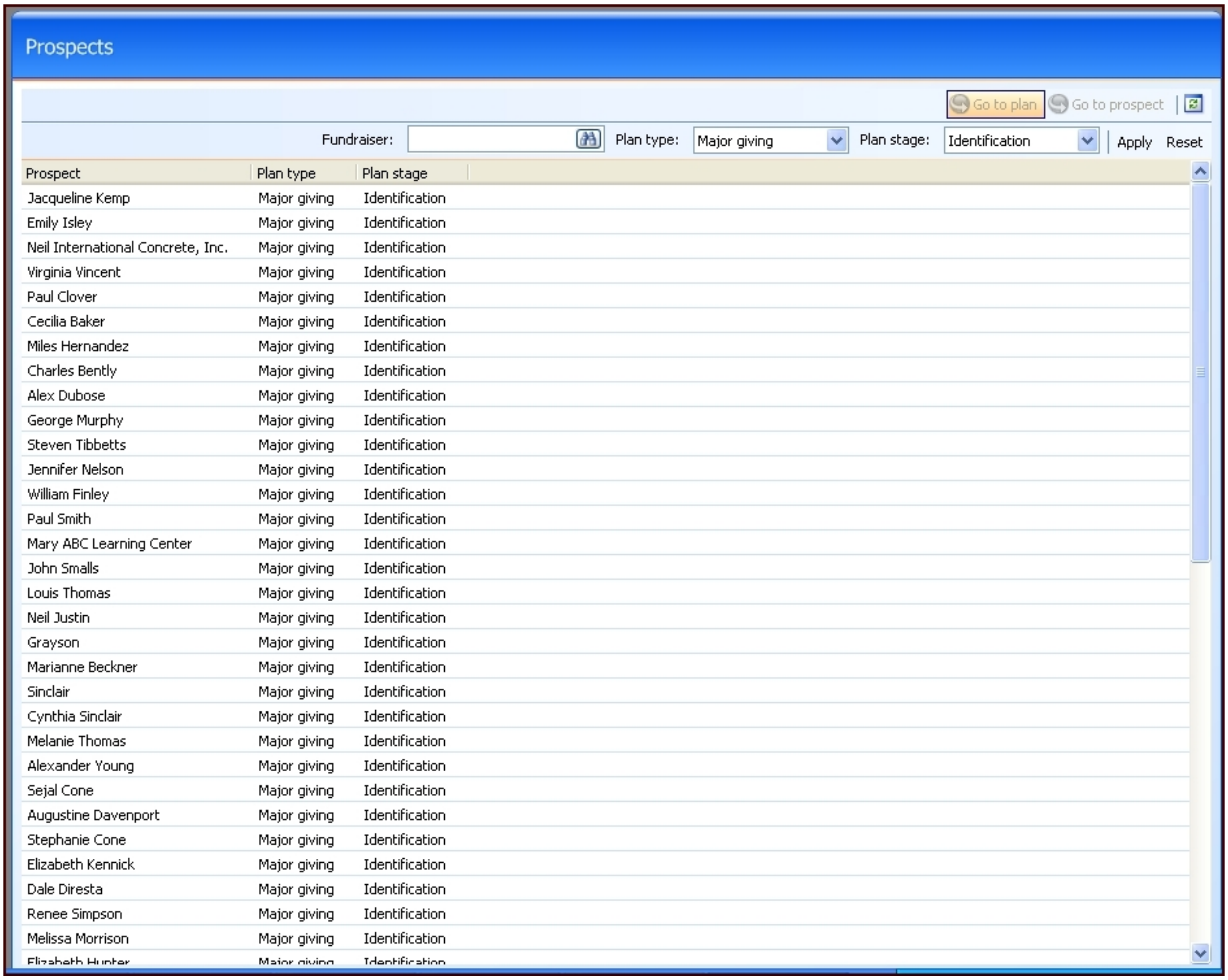
1. From the *Prospects* drop-down menu, click **Major giving management**, and select “Prospects”. The Prospects page appears, displaying the Prospects in Pipeline tab.



If your organization uses teams, you can select an **Organizational team** on which to base the summary information. Teams are created in **Manage Organization Hierarchy** in *Administration*. For more information, see the *Administration Guide*

At the top of the tab, the **Total prospect plans in the pipeline** displays. The rest of the tab is composed of grids and graphs, one for each **Plan type** to which prospects are assigned, displaying details about where your prospects stand in the plan. For example, you can see how many prospects are in the "Identification" stage of the major giving plan and how many are in the "Cultivation" stage.

2. To view a list of prospects in a specific **Plan stage**, click on the number displayed in the corresponding **Prospects** column. For example, if you want to view a list of prospects in the "Identification" stage of the major giving plan, in the **Plan type: Major giving** grid, click on the number in **Prospects** column of the **Identification** row. The Prospects page appears.



Prospect	Plan type	Plan stage
Jacqueline Kemp	Major giving	Identification
Emily Isley	Major giving	Identification
Neil International Concrete, Inc.	Major giving	Identification
Virginia Vincent	Major giving	Identification
Paul Clover	Major giving	Identification
Cecilia Baker	Major giving	Identification
Miles Hernandez	Major giving	Identification
Charles Bently	Major giving	Identification
Alex Dubose	Major giving	Identification
George Murphy	Major giving	Identification
Steven Tibbetts	Major giving	Identification
Jennifer Nelson	Major giving	Identification
William Finley	Major giving	Identification
Paul Smith	Major giving	Identification
Mary ABC Learning Center	Major giving	Identification
John Smalls	Major giving	Identification
Louis Thomas	Major giving	Identification
Neil Justin	Major giving	Identification
Grayson	Major giving	Identification
Marianne Beckner	Major giving	Identification
Sinclair	Major giving	Identification
Cynthia Sinclair	Major giving	Identification
Melanie Thomas	Major giving	Identification
Alexander Young	Major giving	Identification
Sejal Cone	Major giving	Identification
Augustine Davenport	Major giving	Identification
Stephanie Cone	Major giving	Identification
Elizabeth Kennick	Major giving	Identification
Dale Diresta	Major giving	Identification
Renee Simpson	Major giving	Identification
Melissa Morrison	Major giving	Identification
Elizabeth Hunter	Major giving	Identification

From the Prospects page, you can do the following:

- Filter the prospects list based on **Fundraiser**, **Plan type**, or **Plan stage**. Click **Apply** to update the page display based on your new criteria. Click **Reset** to return the page to its original condition.
- Select an entry in the grid and click **Go to plan** to view the plan assigned the selected prospect.
- Select an entry in the grid and click **Go to prospect** to view the selected prospect.
- Click **Back** to return to the Prospect pipeline tab.

Manage Unassigned Prospects

The Unassigned Prospects tab displays all prospects in your system that have yet to be assigned a primary manager fundraiser. From this tab, you can view plans and prospect records, assign fundraisers, and change and view steps.

View unassigned prospects

1. From the *Prospects* drop-down menu, click **Major giving management**, and select “Prospects”. The Prospects page appears, displaying the Prospects in Pipeline tab.
2. Select the Unassigned Prospects tab. All prospects not yet assigned to a fundraiser appear.

   From the Unassigned Prospects tab, you can do the following:

   - Select an entry in the grid and click **Go to prospect** to view the selected prospect. From the prospect, you can assign a plan to the prospect. Once a plan is assigned, the other buttons on the tab activate.
   - Select an entry in the grid and click **Go to plan** to view the plan assigned the selected prospect.
   - Select an entry and **Assign fundraisers**.
   - Edit the next step for a selected entry.
   - Select an entry in the grid and click **Go to next step** to view the next step planned for the prospect.

Assign Fundraiser

The Unassigned Prospects tab on the Prospects page in **Major giving management** allows you to assign fundraisers to any prospects in your system not yet assigned.

Assign a fundraiser to unassigned prospects

1. From the *Prospects* drop-down menu, click **Major giving management**, and select “Prospects”. The Prospects page appears, displaying the Prospects in Pipeline tab.
2. Select the Unassigned prospects tab.
3. In the **Unassigned prospects** grid, select the prospect to which you want to assign a fundraiser.
4. Click **Assign fundraiser**. The Fundraiser screen appears.

   Note: If the prospect has not yet been assigned a plan, the **Assign fundraiser** button is not activated. To assign the prospect a plan, select the prospect and click **Go to prospect**. The prospect opens, and you can assign a plan to the prospect.

5. Enter the necessary information.

Fundraisers Screen

From this screen, you can assign fundraisers to selected prospects currently unassigned in your system.

Screen Item	Description
Primary manager	Click the binoculars button to access the Search screen and locate the primary prospect manager you want to assign this prospect plan.
Secondary Manager	Click the binoculars button to access the Search screen and locate the fundraiser you want to assign as a backup or secondary manager (if any) for this prospect plan.
Secondary solicitors	In this grid, click the binoculars button to access the Search screen and locate the fundraiser you want to assign as Secondary solicitor (if any) for this prospect plan.
Role	Select the **Role**, if any, the **Secondary solicitor** plays. For example, the S**econdary solicitor** may be a "Board Member" or "Volunteer".
Search Screen	Locate the record you want to use from this screen. Enter the criteria on which you want to base your search. Complete as many fields as you like, and you do not have to completely fill in any field. For example, if you know the last name begins with Sm, you can enter "Sm"in the **Last/Org name** field. To run a search based strictly on your search criteria, mark **Match all criteria exactly**. You can also choose to **Include Deceased** and **Inactive** individuals. If you choose to include address information in your search, mark **Only search primary address** if you want the program to look only in address records designated as "Primary" on the constituent record. Click **Search** to start the search. All records satisfying your criteria appear in the Results grid in the bottom half of the screen. Select the record you want, and click **Select**.

Edit Next Planned Prospect Step

The Unassigned Prospects tab on the Prospects page in **Major giving management** allows you to edit the next planned step in the unassigned prospect.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters. For more information about creating plans, see Prospect Plans on page 313.

Edit next planned prospect step

1. From the *Prospects* drop-down menu, click **Major giving management**, and select "Prospects". The Prospects page appears, displaying the Prospects in Pipeline tab.
2. Select the Unassigned prospects tab.
3. Select the prospect for which you want to change the next planned step.
4. Click **Edit next step**. The Edit step screen appears.

   For information about working on this screen, see Edit Step Screen on page 366.

5. After you complete your edits, click **Save** to save the step and return to the Unassigned prospects tab.

Edit Step Screen

From this screen, you make any necessary changes to the planned prospect step.

Manage Prospects with No Recent Steps

The Prospects With no Recent Activity tab displays all prospects in your system that have no step activity recorded within the past 90 days. From this tab, you can view plans and prospect records.

View prospects with no recent steps recorded

1. From the *Prospects* drop-down menu, click **Major giving management**, and select "Prospects". The Prospects page appears, displaying the Prospects in Pipeline tab.
2. Select the Prospects With no Recent Activity tab. All prospects with no step activity recorded within the past 90 days display.

   From the Prospects With no Recent Activity tab, you can do the following:

   - Select an entry in the grid and click **Go to prospect** to view the selected prospect.
   - Select an entry in the grid and click **Go to plan** to view the plan assigned the selected prospect.

Prospect Plan Step Page

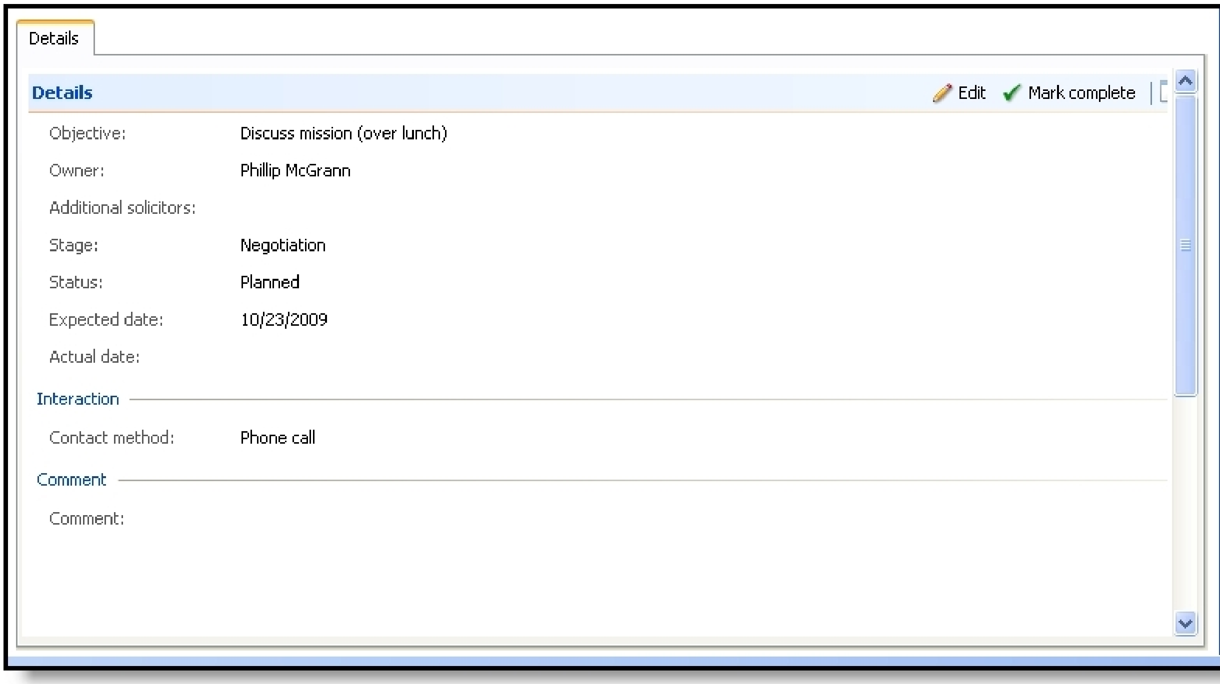
You access the Step page from various locations in the program in which step information is displayed. For example, you can access the Steps page from the Prospects Steps page in **Major giving management**; or you can access the page from the Pending Activity tab of a fundraiser record.

From this page, you can view and manage steps you organization has in place to win donations from prospects.

Note: Steps are measures taken in a *Prospects* cultivation plan. Often times steps are interactions the fundraiser has with the prospect. For example, steps in your *Prospects* plan may include meetings, phone calls, letters.

Step Details

The Details tab on the Step page displays information about the selected step. You can view the objective of the step and the step owner, determine if step includes multiple solicitors or prospects, view the stage and status of the step, as well as the type of interaction involved and any participants in the step. To update the step's details, click **Edit**. If the step has been completed, click **Mark complete**.



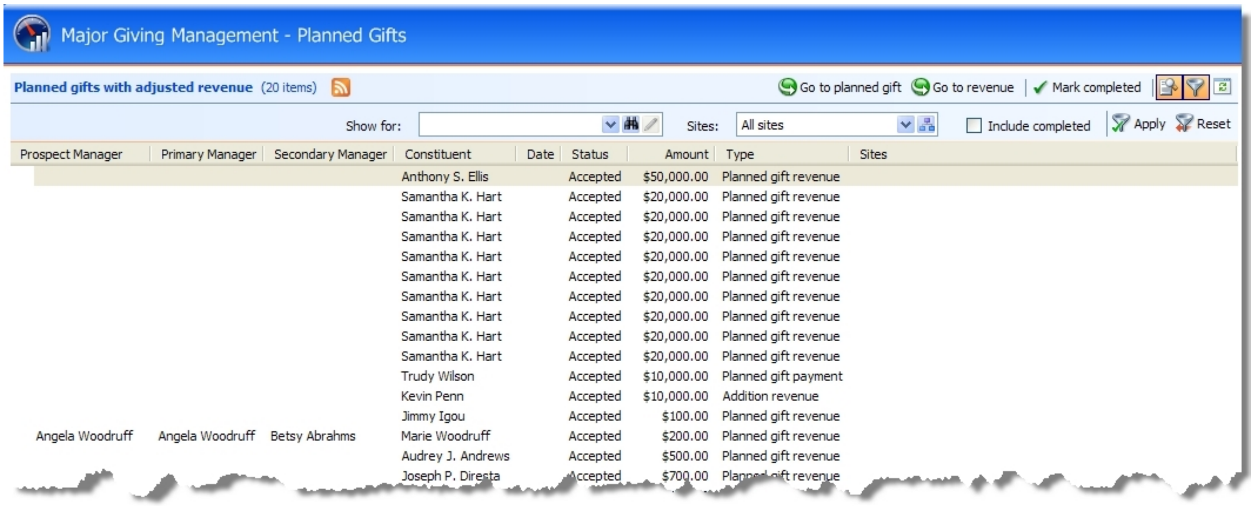
For more information about how to edit a step, see Edit a Step Screen on page 335.

Manage Planned Gifts

From the Planned Gifts page of Major Giving Management, you can view all planned gifts with adjusted revenue. For example, when the revenue amount, date, or designation is adjusted, the associated planned gift appears in the grid. From the grid, you can then update related planned gift information, such as planned gift amount, realized amount, net present value recognition amount and associated date fields.

The **Planned gifts with adjusted revenue** grid displays information associated with the planned gifts, such as prospect manager, primary and secondary managers, constituent, planned giving date, planned giving amount, and the type of transaction and revenue.

From the Planned Gifts page you can access the planned gift record or associated revenue record, mark the planned gift complete, and set up RSS feeds to notify users that planned gift records have been edited or need further review.



To make locating planned gifts easier, use the filters located just above the **Planned gifts with adjusted revenue** grid. For example, you can specify that only "completed" planned gifts appear in the grid. Once you select your filters, click **Apply** to filter the grid.

To access the Planned Gifts page, select **Planned Gifts** on the Major giving management page.

View Planned Gifts and Additions

You can access planned gift records and planned gift additions from the Planned Gifts page.

View planned gifts and additions

1. From the Major Giving Management - Planned Gifts page in *Prospects*, select the planned gift or planned gift addition you want to view from the grid.
2. Select **Go to planned gift** or **Go to planned gift addition**. The planned gift record appears.
3. To return to the Planned Gifts page, click **Back**.

View Planned Gift Revenue

You can access planned gift revenue and payments from the Planned Gifts page.

View planned gift revenue

1. From the Major Giving Management - Planned Gifts page in *Prospects*, select the planned gift revenue you want to view from the grid.
2. Select **Go to planned revenue**. The planned gift revenue record appears.
3. To return to the Planned Gifts page, click **Back**.

Mark Planned Gift Complete

From the Planned Gifts page in **Major giving management**, you can mark a selected planned gift as "Complete". Once a planned gift is marked "Complete," it is removed from the grid.

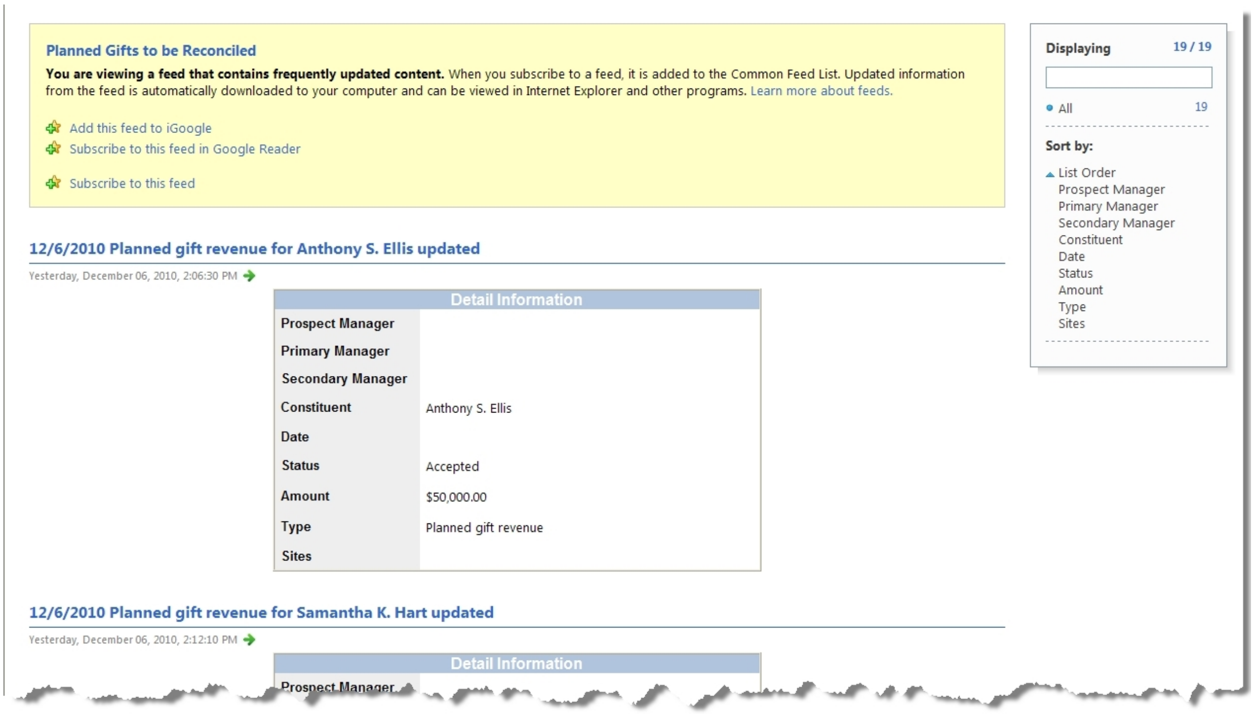
Mark planned gift "complete" from Manage major giving

1. From the Major giving management - Planned Gifts page in *Prospects*, select the planned gift you want to mark complete.
2. Select **Mark completed**. A confirmation screen appears.
3. Select **Yes**.
4. The planned gift is marked as complete and removed from the grid.

Manage Planned Gift RSS Feed

With the **View RSS feed** button included on the **Planned gifts with adjusted revenue** grid, data consumers can monitor planned gift information without logging in and running the program.

Simply click the **View RSS feed** link on the grid. The planned gifts that appear in the grid are displayed in the dashboard format in your Web browser.



Provide the Web page address to your data customers. They can then subscribe to the feed, adding it to their **Microsoft Feeds** list and generate up-to-date planned gift data from their Web browser at any time.

Mapping

To geographically locate prospects and constituents on an interactive map, you can use the integrated mapping functionality, powered by Microsoft *Bing Maps*.

You can access the Mapping page from various locations in the system, including *Prospects*, *Constituents*, the Wealth & Ratings page, and the Members tab of a Research Group record.

Note: To map an address, you must have mapping credentials entered. The system administrator enters the credentials for the Mapping functionality through the **Mapping** configuration task in *Administration*

On the Mapping page, you can access the mapping tool and begin to create maps with the addresses stored in your database. For example, you can enter criteria to locate a group of constituents in a specific area. In addition, you can navigate to specific records in your database from mapped locations. To access the Mapping page from *Constituents*, click **Constituent map**. To access the Mapping page from *Prospects*, click **Mapping**.

To indicate a location on the map, you can add a pushpin or map entity. After you add pushpins or entities, you can create route directions between multiple locations or perform a radius search to find known addresses within a specific distance from a location.

To help keep track of mapped records, you can create static output queries for either the full set of mapped records or a subset of records. The queries appear on the Query page and can be used with other functions, such as *Analysis*, or to create additional maps.

Mapping Tools

From the Mapping page, you can use multiple tools to find locations and add and save mapped entities.

Screen Item	Description
Enter business name or category	To find the location of an organization on the map, enter the name or category of the business and click **Search**.
Enter city, address or landmark	To find the location of a city, specific address, or landmark on the map, enter the name or address of the location and click **Search**.
Add	To add an entity to the map, click this button and select the type of entity to add.
Open a saved map instance	To open a previously saved map instance, click this button. The Map Instance Search screen appears so you can select the map to open.
Save	To save an instance of the map, click this button. You can also select to save a group of mapped records as a research group or selection.
Print	To print a copy of the map, click this button. If you map a route between multiple locations, you can select to print directions for the route.
Refresh map	To refresh the map and remove all added entities, click this button.

Screen Item	Description
Pushpins tab	This tab displays name and address information associated with any pushpins included on the map. Using the **Sort by** field, you can sort records by name, state, and post code.
Groups tab	This tab displays information about all groups associated with any pushpins included on the map, including total number of records and the total number of mapped records. Using the **Sort by** field, you can sort records by name and number of records.

Mapping Interactions

When you map locations and view records on the interactive map, you can use these tools to navigate the map, change views, mark locations, and view driving directions.

Screen Item	Description
Directional arrows	Click the directional arrows to pan in any direction.
Zoom	Click the magnifying glass icons to zoom in and out from the map.
Map views	Select how to display the map: **Road**, **Aerial**, and **Bird's eye**.
Labels	Click this button to hide the labels on the map.
Add pushpin	To indicate a location with a pushpin, right-click at the location and select **Add pushpin**.
Center map here	To center the map around a location, right-click at the location and select **Center map here**.
Start route and **End route**	To create driving directions between two locations on the map, hover your cursor over each location and select whether it is the start or end point.
Radius search	You can create a radius on the map to locate addresses from your database within a specific distance from a location. To create a radius around a location, hover your cursor over a pushpin or map entity at the location and select **Radius search**.

Constituent Density Map

On the Constituent Density Map page, you can view a heat map of selected constituent addresses, such as to determine the ideal location for an event or a marketing effort. To access the Constituent Density Map page, from *Marketing and Communications*, click **Constituent density map**.

On the heat map, you can view the density of multiple constituent selections at one time. To add a constituent selection to the map, click **Add** on the action bar and search for the selection. The map indicates, by color, areas on the map more heavily represented by addresses in the selections. If a constituent appears in multiple selections on the map, the program counts the constituent only one time in the density.

Address Geocodes

Before an address can be mapped, it must have a geocode. You can assign geocodes when you create new records or import records into the system. For existing records, we recommend you use the global change functionality to assign geocodes.

Add address geocodes

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Add Global Change Instance screen appears.
3. Select **Address Geocode** and click **OK**. The Add global change screen appears.
4. Enter a unique name and selection for the global change. If necessary, click the binoculars to locate an existing selection of records.
5. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

   When you select a site and save the process:

   - Only users with access to the selected site can run the global change process.
   - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
   - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen).
   - On the Global Change page, an **Owner** column displays, so you can see who created the process.
6. Select whether to process only primary addresses in the global change.
7. Click **Save**. You return to the Global Changes page.
8. To process the records, select the global change you created and click **Process global change**.

Map Entities

From the Mapping page, you can add entities such as constituents and selections to the map. After you add entities, you can save the map instance for future use. You can also save the mapped entities as a research group or selection or create route directions between two entities.

Add a map entity

From the Mapping page, you can add addresses of constituents, research lists, and selections as entities. After you add entities, you can save the map of their locations for future use.

Tip: Before you can map an address, it must be assigned a geocode. You can assign geocodes when you create new records or import records into the database. For existing records, we recommend you use the Address Geocode global change process to assign geocodes

1. On the Mapping page, click **Add** on the action bar and select the type of entity to add, such as **Constituent** or **Selection**. A search screen appears.

2. Search for and select the record to add. You return to the Mapping page.
3. On the map, an indicator appears at the location of the selected address. To view address information about the entity, hover your cursor over the indicator.
4. To further identify the location, right-click on the indicator and select **Add pushpin**. For information about how to add a pushpin, see Manage Pushpins on page 373.
5. To center the map around the location, right-click on the indicator and select **Center map here**.
6. To change views and navigate the map, use the mapping tools on the action bar. For information about these tools, see Mapping Tools.

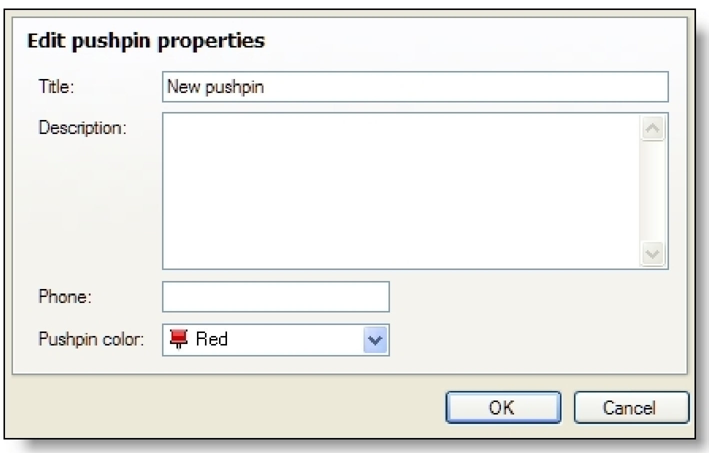
Manage Pushpins

To indicate a location on the map, you can add a pushpin. When you add a pushpin, you can select its color, such as to help differentiate multiple types of locations or entities.

Add or edit a pushpin

1. On the Mapping page, select the location of the pushpin.
2. To add a pushpin, right-click on the location to indicate with the pushpin and select **Add pushpin**.
3. To edit the properties of an existing pushpin, hover your cursor over the pushpin and select **Edit pushpin properties**.

   The Edit pushpin properties screen appears.



4. Enter a unique title and description to help identify the location.
5. In the **Phone** field, enter the phone number for the location.
6. Select the color to assign the pushpin.
7. Click **OK**. You return to the Mapping page.

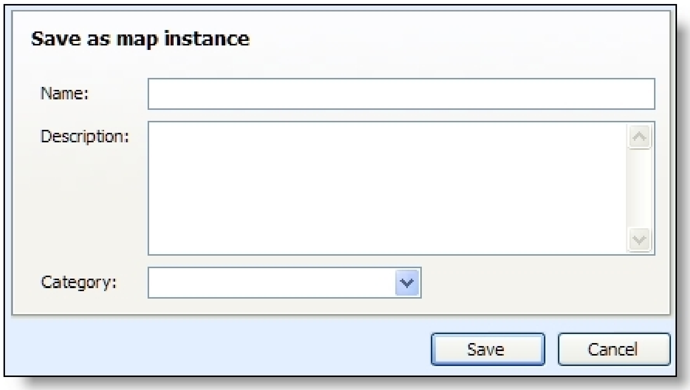
Save an Instance of a Map

You can save a copy of the map for later use, such as after you add multiple entities or pushpins.

After you save a map instance, you can manage it from the Map instance page.

Save a map instance

1. On the Mapping page, click **Save** on the action bar. The Save as map instance screen appears.



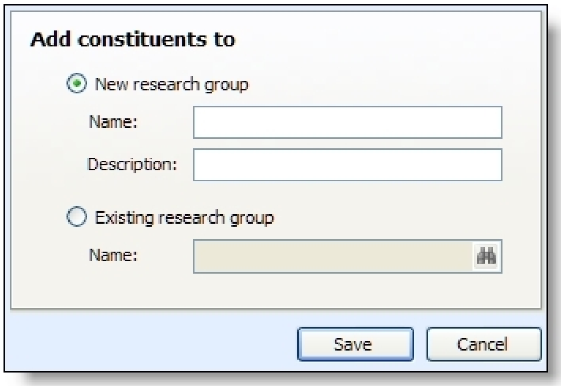
2. Enter a unique name and description to help identify the map instance.
3. To group the map with other similar maps, in the **Category** field, select the category of the map. Your system administrator configures the available categories.
4. Click **Save**. You return to the Mapping page.

Save Mapped Constituents

When you map multiple constituents, you can save the records as a selection or research group.

Save records as a research group

1. On the Mapping page, click **Save** on the action bar and select **Save to research group**. The Add constituents to screen appears.



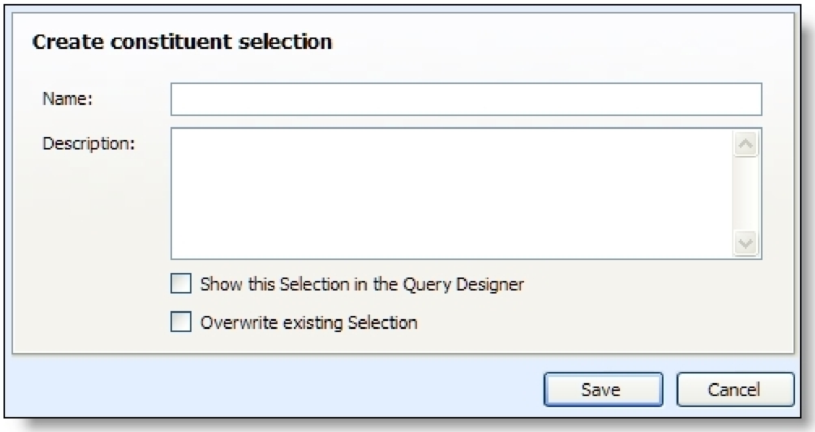
2. Select whether to save the records to a new research group or an existing research group.
   - To create a new research group, select **New research group** and enter a unique name and description to help identify the group.

- To add the records to an existing group, select **Existing research group** and search for the group to add the records to.

3. Click **Save**. You return to the Mapping page.

Save records as a selection

1. On the Mapping page, click **Save** on the action bar and select **Save to selection**. The Create constituent selection screen appears.



2. Enter a unique name and description to help identify the selection.
3. Select whether to display the selection in the Query Designer.
4. To overwrite an existing selection with the same name, select **Overwrite existing Selection**.
5. Click **Save**. You return to the Mapping page.

Create Route Directions Between Two Entities

To create the route directions between two locations on a map, you can use the **Start route** and **End route** functionality accessed from mapped entities and pushpins. On the Mapping page, hover your cursor over the origination location and select **Start route**. Then, hover your cursor over the destination and select **End route**. On the map, the route appears between the two locations. Under **Directions**, the driving directions for the route appear. You can print, reverse, and clear the directions as necessary.

Radius Search

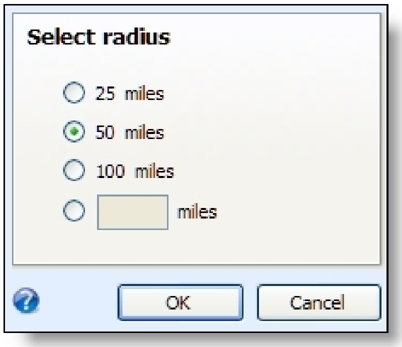
From a pushpin, you can create a radius around a location to locate addresses from your database within a specific distance from the location.

Note: From *Administration*, you can configure whether distance within a radius search appears in miles or kilometers.

Before you can perform a radius search, you must first mark the location to use as the center of the radius. For information about how to add a pushpin or map entity at the location, see Manage Pushpins on page 373 orMap Entities on page 372.

Create a radius search on a regular constituent map

1. Hover your cursor over the pushpin or entity to use as the center of the radius and select **Radius search**. The Select radius screen appears.

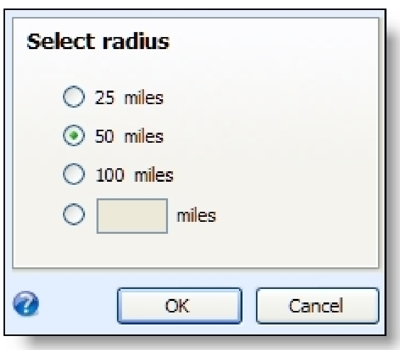


2. Select the distance from around the pushpin to include in the search. For example, to locate all known addresses within 50 miles of the pushpin location, select **50 miles**.
3. Click **OK**. You return to the Mapping page. On the map, the records that exist within the radius appear as map entities.

Note: To remove the radius, hover over the radius circle and click **Remove radius**.

Create a radius search on a density map

1. Hover your cursor over the pushpin or entity to use as the center of the radius and select **Radius search**. The Select radius screen appears.

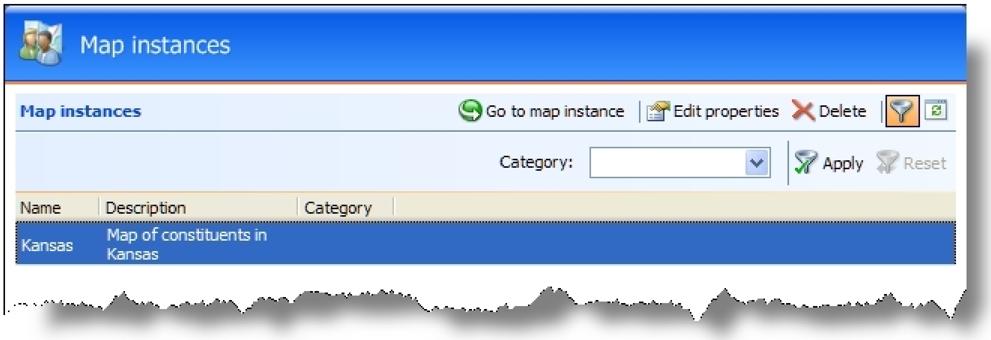


2. Select the distance from around the pushpin to include in the search. For example, to locate all known addresses within 50 miles of the pushpin location, select **50 miles**.
3. Click **OK**. You return to the Mapping page.
4. To create a selection of records included in this radius search, click the disk icon, then click **Save to selection**. A screen appears allowing you to name and save a selection of all records located in the defined radius. Select **Show this Selection in Query Designer** if you want to access this selection from the Query functionality.

Note: To remove the radius, hover over the radius circle and click **Remove radius**.

Map Instances

From the Map instances page, you can manage the maps you have saved. To access the Map instances page from the Mapping page, click **Manage map instances** under **Tasks**.



Under **Map instances**, the saved maps appear. To help find a specific map instance, you can filter the grid by map category. To filter the grid, click **Filter** on the action bar, select the category of maps to view, and click **Apply**. To remove the filter and display all map instances, click **Reset**.

Edit the Properties of a Map Instance

After you save a map instance, you can edit its properties, such as name, description, or category, as necessary.

Edit map instance properties

1. On the Mapping page, click **Manage map instances** under **Tasks**. The Map instances page appears.
2. Under **Map instances**, select the map with the properties to edit.
3. On the action bar, click **Edit properties**. The Edit map instance properties screen appears. The items on this screen are the same as the Save as map instance screen.
4. Edit the information as necessary.
5. Click **Save**. You return to the Map instances page.

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.

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.

Delete a social media service

If a social media or social networking service closes and no constituent records have accounts with the service, you may want to delete the service. You can not delete services configured by*Blackbaud*.

1. From *Constituents*, click **Social media services** under **Configuration**. The Social Media Services page appears.
2. Select the service to delete and click **Delete**. A message appears to ask whether to delete the service.
3. Click **Yes**. You return to the Social Media Services page.

Solicitation Preparation

As you prepare for the key moment when you ask the prospect for a major gift, your development officer may ask your researcher to complete some additional research. You may also want to look into the prospect analysis tools and if purchased, custom model scores and ratings from Target Analytics. These tools can help you determine how much to ask for in a gift, in addition to who in your database is a good prospect to cultivate.

Prospect Analysis

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

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

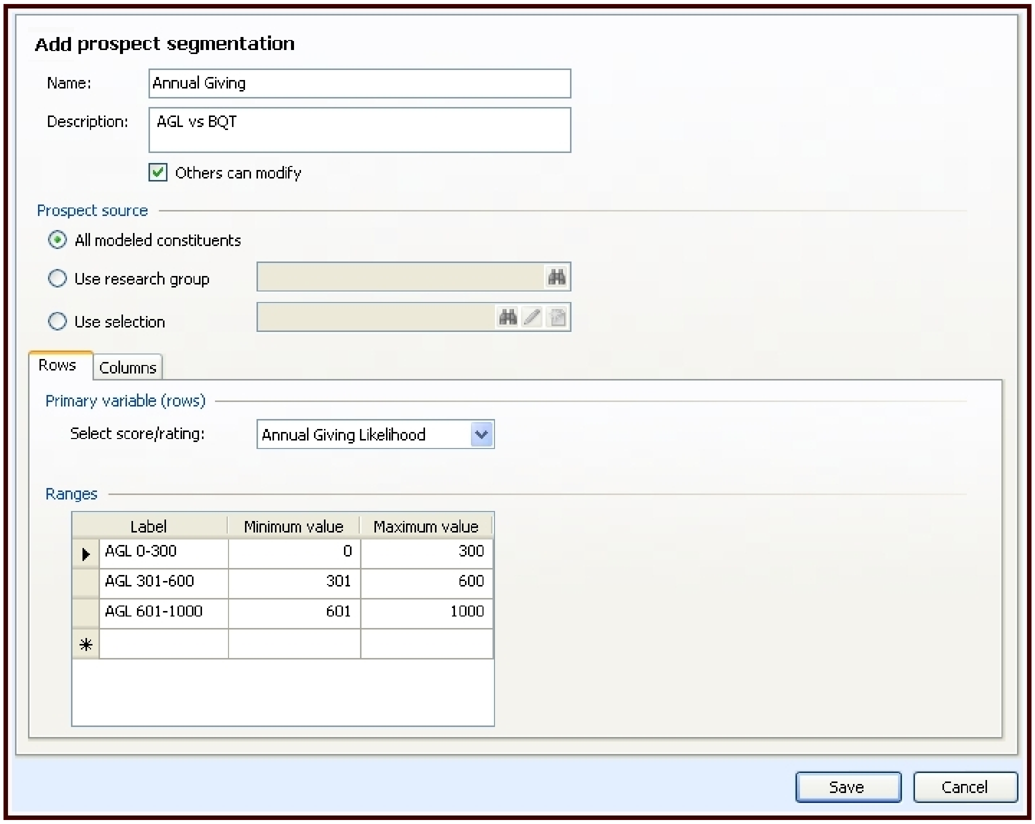
Add or Edit Prospect Analysis Dashboards

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

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

Add a prospect analysis segmentation

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



2. Define your prospect analysis dashboard.
3. The segmentation report is designed to display values from low to high, so make sure you enter your column and row information to correspond with this rule. For example, if you select Annual giving likelihood for rows, in the **Ranges** grid, make sure your first entry is the lowest AGL rating you want included in the report. The next grid entry should be the second lowest and so on.
4. Click **Save**. You return to the Prospect analysis page. The new dashboard displays in the **Prospect analysis dashboard** grid.

Add a Prospect Segmentation Screen Fields

Screen Item	Description
Name	You must name the prospect analysis dashboard. The name appears in the **Prospect analysis dashboard** grid on the Prospect analysis page.
Description	You can enter a description of the dashboard to help you identify it later. The description appears in the **Prospect analysis dashboard** grid on the Prospect analysis page.
Others can modify	Select if you want to allow other users to make changes to this definition.
Prospect source	Select the constituents you want to include in your dashboard. **All modeled constituents**: Any constituent in your database with modeling or rating information that satisfies the variables selected. **Use Research List:** Any constituent included in the selected Research List with modeling or rating information that satisfies the variables selected. **Use selection**: Any constituent included in the chosen query selection with modeling or rating information that satisfies the variables selected.
Rows tab	Define the rows to be included in the Prospect Analysis cross tabs report: • **Select score/rating**: Select the score or rating variable on which you want to base the rows displayed in your report. Ratings added by your organization are not available as variables. Also, you cannot select the same score or rating used on the Columns tab. • **Ranges**: You must define at least one row using the columns provided in the **Ranges** frame. Each row must include a **Label**, **Minimum value**, and **Maximum value**. For example, if you select “Annual Giving Likelihood” in the **Select score/rating** field, for ranges to display in your report rows, you can enter “AGL 0-300” as a row **Label**, “0” as a **Minimum value**, and “300” as a **Maximum value**. To the right side of the **Ranges** grid, use the up and down arrows to arrange entries in the grid. You must select the entire row you want to move to activate the arrows.

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

Research List Search Screen

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

Update Prospect Analysis Dashboards

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

Prospect Segmentation Page

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

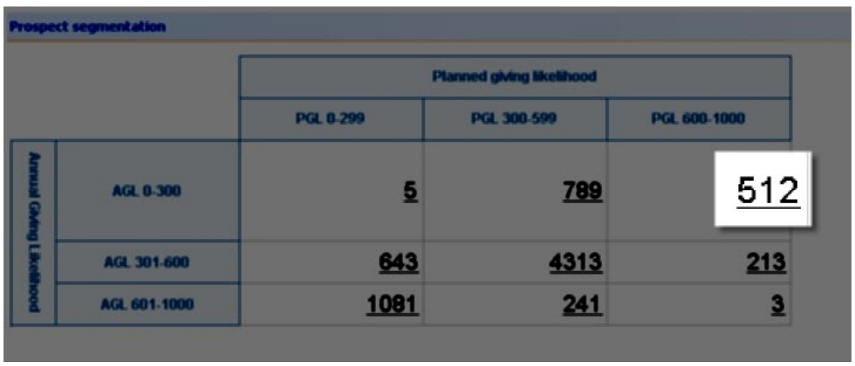
View Segment Page

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

Access Segmentation Page

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

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

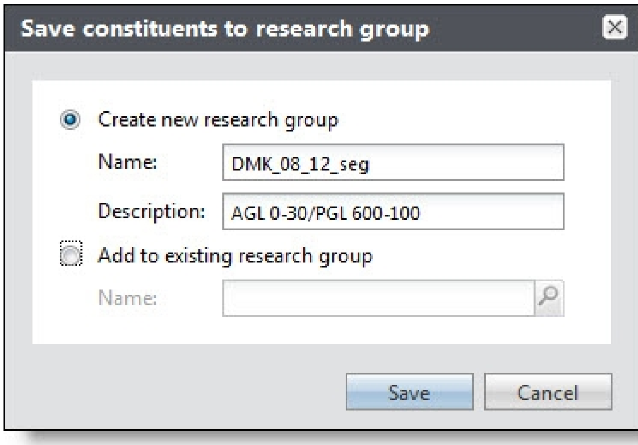


Click on the number included in this segment block to access the segment page displaying prospects satisfying the variable scores.

Save Segment Prospects to Research List

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

1. From the segmentation dashboard, open the segment page.
2. Click **Save constituents** and select **Research List**. The Save constituents to Research List screen appears.

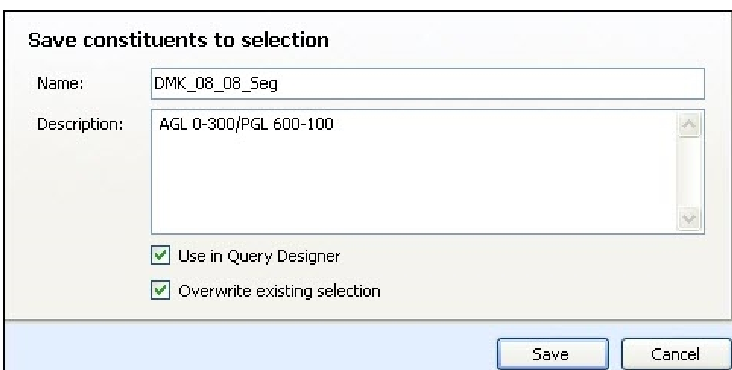


3. To save the prospects to a new Research List, select **Create a new Research List** and enter a name and description.
4. To add the prospects to an existing Research List, select **Add to existing Research List** and click the binoculars in the **Name** field to search for the Research List you want to use.
5. Click **Save**.

Save Segment Prospects to Selection

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

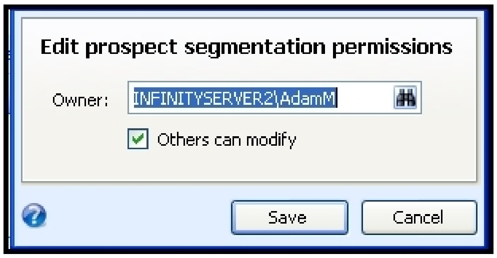
1. From the segmentation dashboard, open the segment page.
2. Click **Save constituents** and select **Selection**. The Save constituents to selection screen appears.



3. Enter a enter a name and description.
4. You can also choose to make the new selection available for use in Query Designer and to overwrite any existing selection that shares this selection name.
5. Click **Save**. The next time you visit **Query**, the new selection displays in the **Constituent** frame of the Selections tab.

Edit Prospect Segmentation Permissions

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



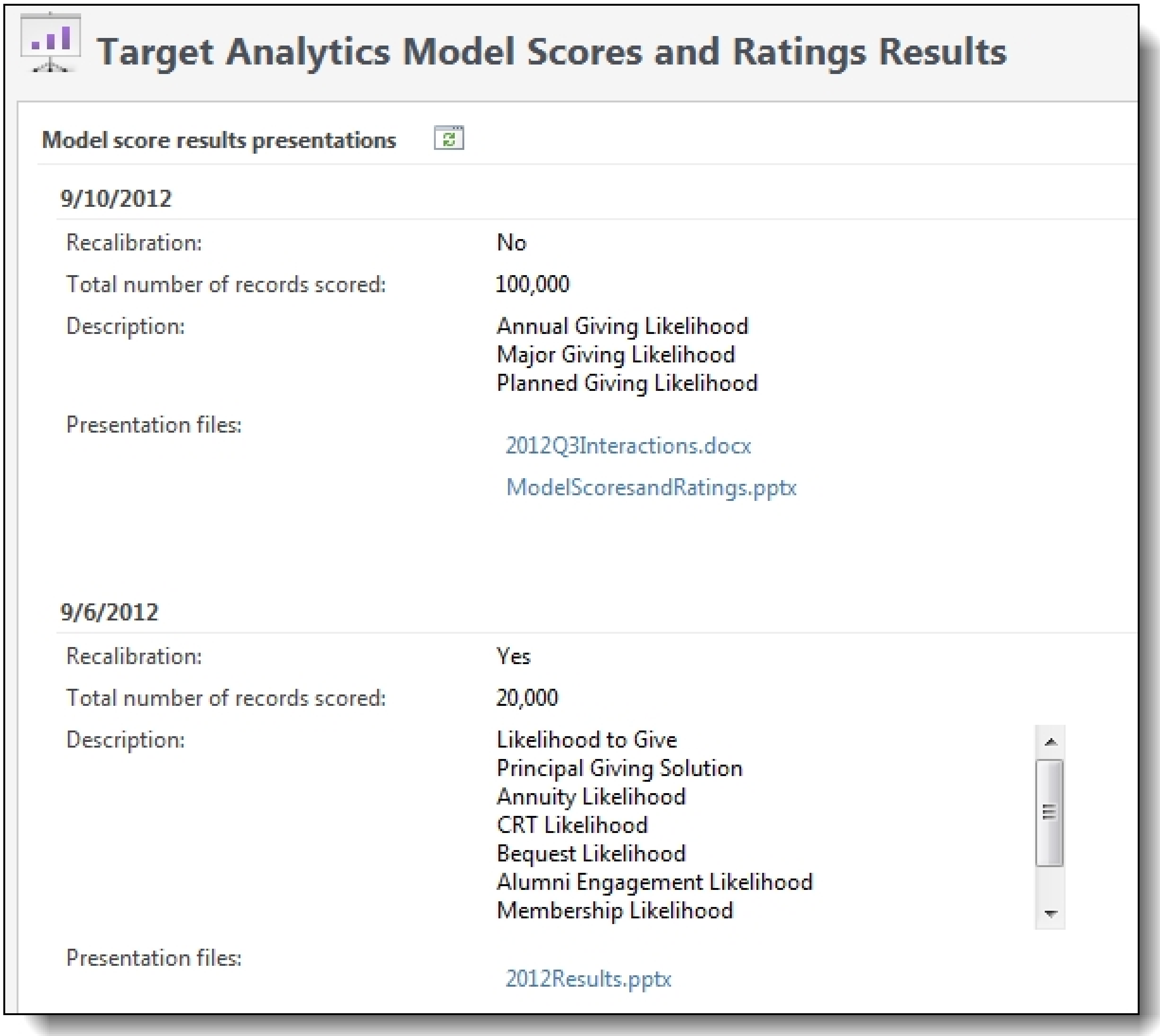
In the **Owner** field, click the binoculars to access the Application users search screen. From this screen, you can assign an owner. Mark the **Others can modify** checkbox if you want to allow anyone other than the assigned owner to make changes. Click **Save** to save the permissions.

Target Analytics Model Scores and Ratings Results

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

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

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


Target Analytics Model Scores and Ratings Results
Model score results presentations
9/10/2012
Recalibration:
No
Total number of records scored:
100,000
Description:
Annual Giving Likelihood
Major Giving Likelihood
Planned Giving Likelihood
Presentation files:
2012Q3Interactions.docx
ModelScoresandRatings.pptx
9/6/2012
Recalibration:
Yes
Total number of records scored:
20,000
Description:
Likelihood to Give
Principal Giving Solution
Annuity Likelihood
CRT Likelihood
Bequest Likelihood
Alumni Engagement Likelihood
Membership Likelihood
Presentation files:
2012Results.pptx

Closing

Hopefully, you've just completed a successful major gift ask of one of your major giving prospects. In addition to regular fundraising gift activities, you may need to complete the last steps of your major gift plan and prepare your prospect for stewardship. Most of the closing tasks, like thank yous and formal recognition, may take place outside the software but you can still track this activity on the prospect record and generate reports about how you performed. You may also want to confirm that those who deserve credit for the major gift received it in the software.

And, if your major gift ask resulted in a planned gift, review the planned gift documentation to ensure the details of the gift are documented completely.

By the end of this stage, you're ready for stewardship and, if the gift was successful, a celebratory dinner for the development team - from researcher to fundraiser, be sure to congratulate the team who worked together to make this donation possible. Our software empowers teams who develop and follow through on major giving plans!

However, before you get back to your daily tasks, we recommend you complete a retrospective to determine what went well, what you could do better, and then put those lessons learned into improving your major giving and prospect research tasks in CRM.

Planned Gift Record

The planned gift record displays details about the selected planned gift. Whenever you create and save a planned gift, the planned gift record automatically opens. You can also access the planned gift record by selecting the record and clicking **Go to planned gift** from the Planned Gifts tab in the prospect. From the record, you can make changes, add comments, and more.

Planned Giver View

From a constituent record, you can easily access the accepted planned gifts of the constituent. Under **View as**, click **Planned giver**. The Revenue Information page for the constituent appears, open to the Planned Gifts tab. To access the record of a planned gift from this tab, select the planned gift under **Accepted planned gifts** and click **Go to planned gift** on the action bar.

Note: **Planned giver** appears under **View as** only for constituents with at least one accepted planned gifts with a designation and designation amount.

To return to the constituent record, click **Back** on the navigation bar, or click **Constituent** under **View as**.

Enable the Automatic Calculation of the Realized Amount

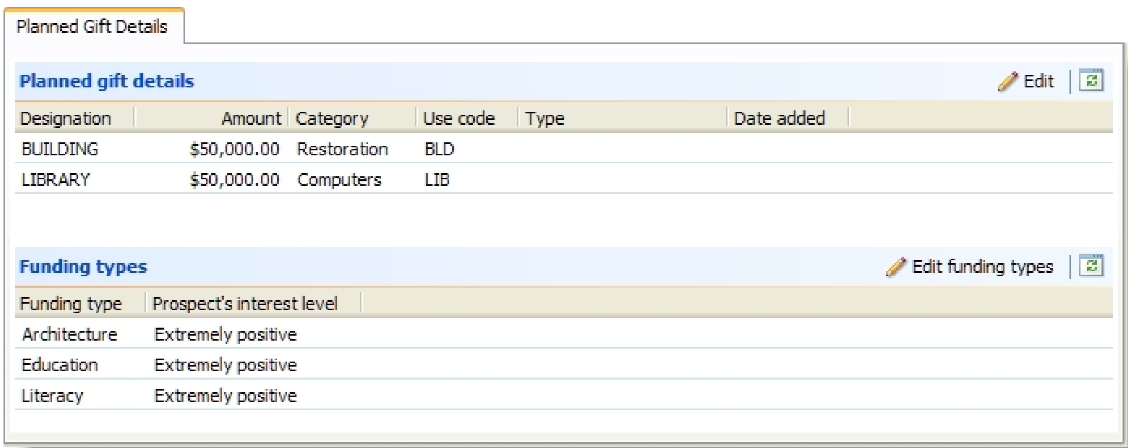
From *Prospects*, you can configure the planned gift vehicle options and select whether to enable the option to automatically calculate the realized amount as your organization receives revenue toward a planned gift.

> ***Note:*** When you select this option on the configuration task for the planned gift vehicle type, the realized amount for a planned gift of this vehicle type is not automatically calculated. Instead, the task to enable the automatic calculation is available from the planned gift under **Tasks**.

In order to have the realized amount automatically calculated for planned gift revenue, the planned gift vehicle type must be set up to enable the automatic calculation. After you add a planned gift of that vehicle type you can click to enable the calculation for revenue for that planned gift.

Planned Gift Details

On the Planned Gift Details tab of a planned gift record, you can view information about how the prospect wants your organization to use the gift.



Planned Gift Details

Planned gift details — Edit

Designation	Amount	Category	Use code	Type	Date added
BUILDING	$50,000.00	Restoration	BLD		
LIBRARY	$50,000.00	Computers	LIB		

Funding types — Edit funding types

Funding type	Prospect's interest level
Architecture	Extremely positive
Education	Extremely positive
Literacy	Extremely positive

Under **Planned gift details**, you can view information about the designations to which to apply the planned gift. The designations determine how your organization uses the gift. For each designation, you can view the amount of the planned gift it receives, its category and use code, type of designation, and the date your organization added it to the planned gift. For information about how to edit this information, see Edit Planned Gift Details on page 389.

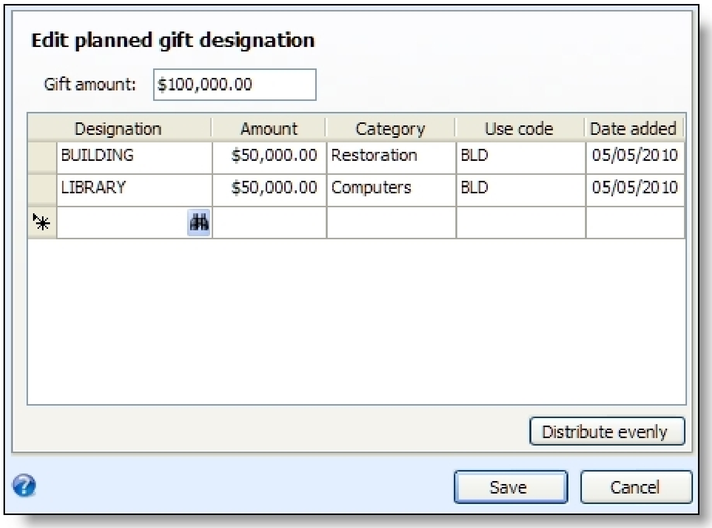
When you create a prospect record, you can specify which organizations, affiliations, activities, or pursuits the prospect expresses interest in and whether the response is positive or negative. For each funding interest you add to a prospect, you can define the level of interest such as Extremely positive, Somewhat positive, or Extremely negative. Under **Funding types**, you can view the funding interests of the prospect to help determine to which designations to apply the planned gift revenue. For information about how to edit this information, see Edit Planned Gift Funding Types on page 390.

Edit Planned Gift Details

From the Planned Gift Details tab of a planned gift, you can specify the designations to which to apply the planned gift revenue. When you add a designation to a planned gift, you can enter how much of the revenue it receives. To help further identify how to use the revenue, you can also assign the designation a category and use code.

Manage planned gift designations

1. Access the record of the planned gift for which to manage the designations. For information about how to access a planned gift record, see Planned Gift Record on page 388.
2. Select the Planned Gift Details tab.
3. Under **Planned gift details**, click **Edit** on the action bar. The Edit planned gift designation screen appears.



4. In the **Gift amount** field, edit the total revenue amount of the planned gift as necessary.
5. In the grid, search for and select the designations to which to apply the gift amount.
6. In the **Amount** column, enter the amount of the gift amount to apply to each designation. To split the gift amount evenly between multiple designations, click **Distribute evenly**.
7. To further define how to use the planned gift revenue, in the **Category** and **Use code** fields, select the categories and use codes within each designation to which to apply the revenue.
8. In the **Date added** column, select the date you add each designation to the planned gift.
9. Click **Save**. You return to the Planned Gift Details tab.

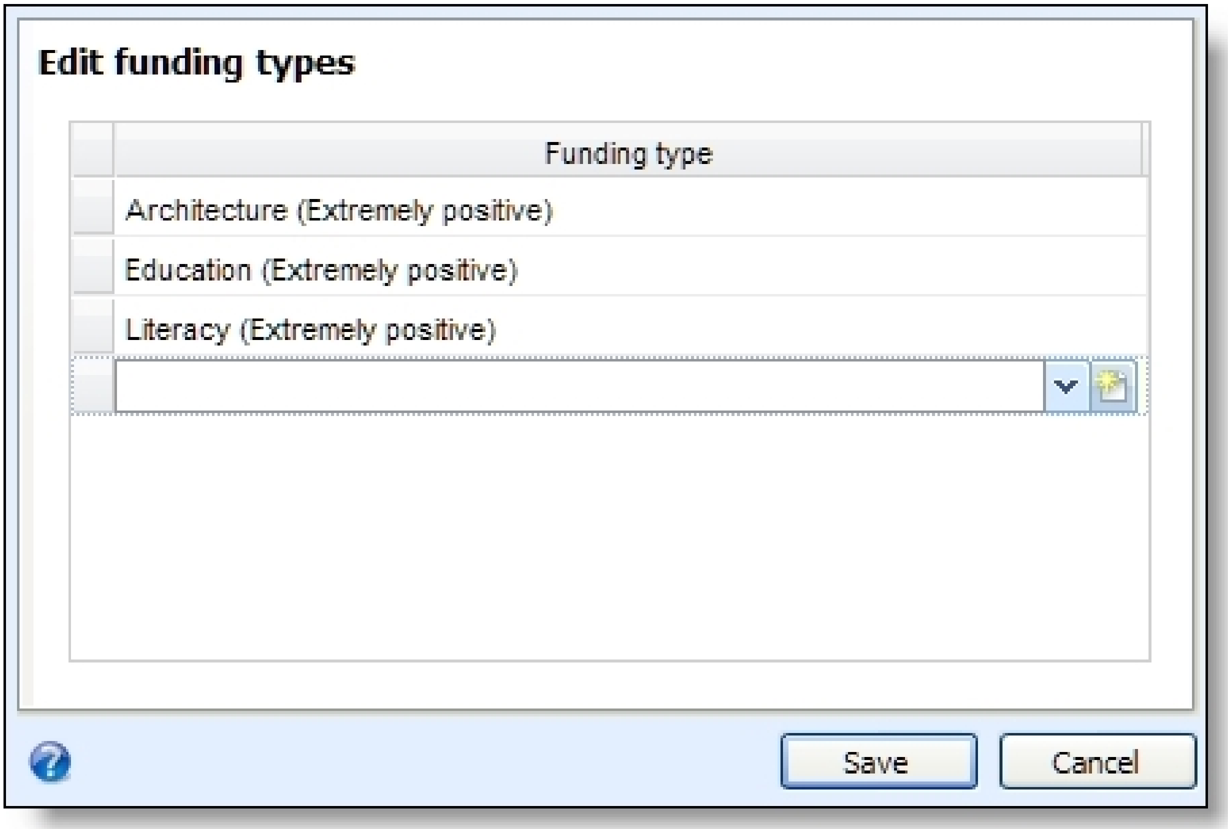
Edit Planned Gift Funding Types

When you create a prospect record, you can specify which organizations, affiliations, activities, or pursuits the prospect expresses interest in and whether the response is positive or negative. For each funding interest you add to a prospect, you can define the level of interest, such as Extremely positive, Somewhat positive, or Extremely negative. From the Planned Gift Details tab, you can use this information to help determine to which designations to apply revenue from a planned gift.

Manage funding types

1. Access the record of the planned gift for which to manage the funding types. For information about how to access a planned gift record, see Planned Gift Record on page 388.

2. Select the Planned Gift Details tab.
3. Under **Funding types**, click **Edit funding types** on the action bar. The Edit funding types screen appears.



4. Select the funding types to associate with the planned gift.

Note: Only the funding interests added to the record of the prospect associated with the opportunity appear as available funding types. For information about how to add a funding interest to a prospect, see Add Funding Interests on page 1.

5. Click **Save**. You return to the Planned Gift Details tab.

Planned Giving Relationships

On the Planned Giving Relationships tab, you track any prospect relationships relevant to the planned gift, such as an attorney or family member. From this tab, you can access the relationship's constituent record and edit the relationship entry. On the constituent record, when you click **Revenue** under **More information**, there is a Planned Gifts tab. The planned gift will appear for the prospect, as well as any constituents listed as planned giving relationships.

Open a relationship's constituent record from a planned gift

1. From the Planned Giving Relationships tab in the planned gift record, select the relationship entry you want to open.

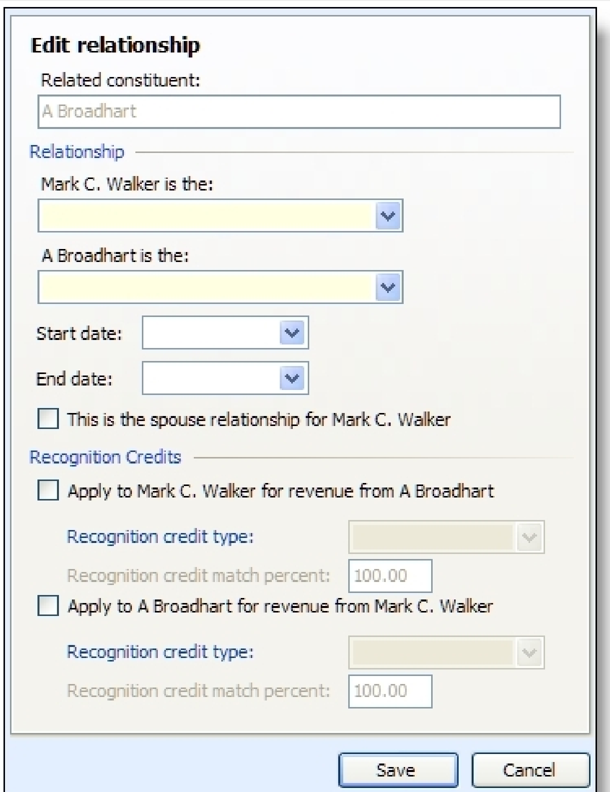
> ***Note:*** For information about how to access a planned gift record, see Planned Gift Record on page 388.

2. Click **Go to constituent**. The relationship's constituent record opens. For information about working in a constituent record, see the *Constituents Guide*.

Edit a planned gift relationship entry

1. From the Planned Giving Relationships tab in the planned gift record, click **Edit**. The Edit relationship screen appears.

> ***Note:*** For information about how to access a planned gift record, see Planned Gift Record on page 388.



2. Make any necessary changes/additions. For more information about the fields and options included on this screen, see Planned Giving Relationships Tab on page 289.
3. Click **Save** to save the changes and return to the Planned giving relationship tab in the planned gift.

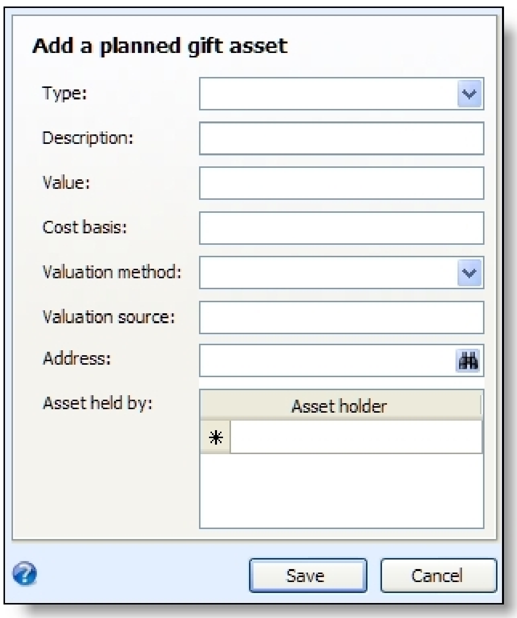
Planned Gift Assets

On the Assets tab, you track any prospect assets relevant to the planned gift. Under **Assets**, you can view its description and value of each asset.

From this tab, you can add and manage assets for the planned gift.

Add an asset to a planned gift

1. Access the record of the planned gift to which to add an asset. For information about how to access a planned gift record, see Planned Gift Record on page 388.
2. Select the Assets tab.
3. Under **Assets**, click **Add** on the action bar. The Add a planned gift asset screen appears. For information about the items on this screen, see Assets Tab on page 289.



4. Select the type of asset to add, such as House or Car.
5. In the **Description** field, enter a unique description to help identify the asset. For example, for a car, enter its make and model information.
6. In the **Value** field, enter the market value for the asset.
7. In the **Cost basis** field, enter the cost of the asset when your organization receives it, such as broker fees or other expenses for an asset of stock or property.
8. In the **Valuation method** and **Valuation source** fields, select how you determine the asset value, and enter the source of this method.
9. In the **Address** field, search for and select which of the prospect's addresses to associate with the asset.

10. Under **Asset holder**, select the related constituents that hold the asset for the prospect. You can search for and select a constituent as necessary.
11. Click **Save**. You return to the Assets tab.

Edit Asset Entry

Edit an asset entry

1. Access the record of the planned gift for which to edit an asset. For information about how to access a planned gift record, see Planned Gift Record on page 388.
2. Select the Assets tab.
3. Under **Assets**, select the asset to edit.
4. On the action bar, click **Edit**. The Edit planned gift asset screen appears. The items on this screen are the same as the Add a planned gift asset screen. For information about the items on this screen, see Assets Tab on page 289.
5. Edit the information as necessary.
6. Click **Save**. You return to the Assets tab.

Delete Asset Entry

Delete an asset entry

1. Access the record of the planned gift from which to delete an asset. For information about how to access a planned gift record, see Planned Gift Record on page 388.
2. Select the Assets tab.
3. Under **Assets**, select the asset to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the asset.
5. Click **Yes**. You return to the Assets tab.

Planned Gift Attributes

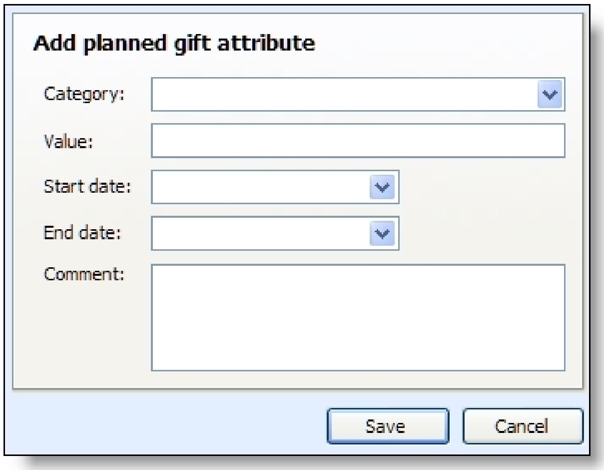
You can use attributes to store specialized information about a planned gift when no field or tab exists for that information. Attributes help track the planned gift information that best meets your organization's needs. For example, you may use attributes to record the constituent's interests to help determine how to apply the gift when your organization receives it. To view the attributes associated with a planned gift, select the Attributes tab.

Note: The Attributes tab appears only if your system administrator configured planned gift attributes. For information about how to add attribute categories, see the *Administration Guide*.

Under **Attributes**, you can view attributes assigned to the planned gift. For each attribute, you can view its value, group, and valid date range. You can also view any comments entered about the attribute. From the grid, you can also manage the attributes assigned to the planned gift.

Add attributes for a planned gift

1. On the record of the planned gift to which to add an attribute, select the Attributes tab.
2. Under **Attributes**, click **Add** on the action bar. The Add planned gift attribute screen appears.



3. In the **Category** field, select the type of attribute to assign to the planned gift. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the planned gift.
5. If the attribute applies to the planned gift for a specific duration, select the start and end dates of the attribute.
6. In the **Comments** field, enter any additional information to record about the attribute.
7. Click **Save**. You return to the Attributes tab.

Edit Planned Gift Attribute

Edit a planned gift attribute

1. On the record of the planned gift with the attribute to edit, select the Attributes tab.
2. Under **Attributes**, select the attribute to edit and click **Edit** on the action bar. The Edit planned gift attributes screen appears. The items on this screen are the same as the Add planned gift attribute screen.
3. Edit the information as necessary.
4. Click **Save**. You return to the Attributes tab.

Delete Planned Gift Attribute

Delete a planned gift attribute

1. After you add an attribute to a planned gift, you can delete it as necessary. To delete an attribute from the record of a planned gift, on the Attributes tab, select the attribute to delete.
2. On the action bar, click **Delete**.
3. When a message appears to ask whether to delete the attribute, click **Yes**. You return to the Attributes tab.

Planned Gift Beneficiaries

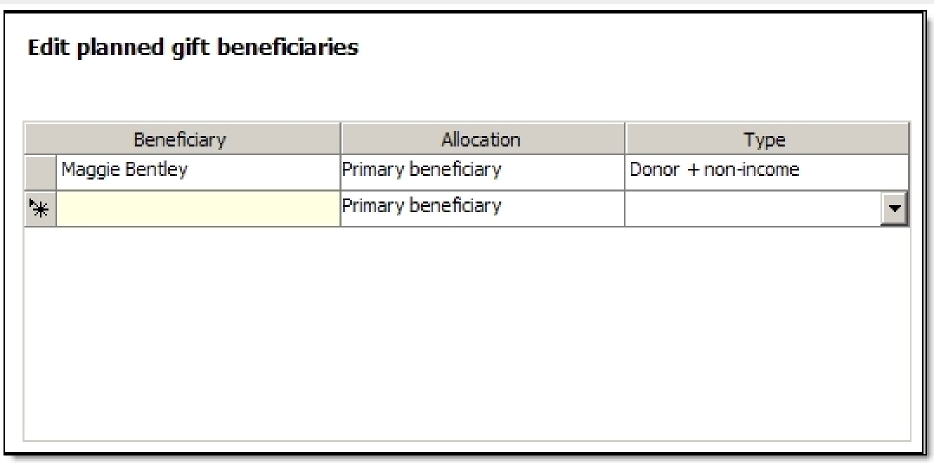
On the Beneficiaries tab, you view information about any beneficiaries associated with the planned gift. From this tab, you can edit beneficiary entries.

Note: The Beneficiaries tab appears for only planned gift vehicles that allow for beneficiaries, such as life insurance.

Edit a beneficiary entry

1. From the Beneficiaries tab in the planned gift record, click **Edit**. The Edit planned gift beneficiaries screen appears.

Note: For information about how to access a planned gift record, see Planned Gift Record on page 388.



2. Make any necessary changes/additions. For more information about the fields and options included on this screen, see Beneficiaries Tab on page 290.
3. Click **Save** to save the changes and return to the Beneficiaries tab in the planned gift.

Planned Gift Revenue Information

On the Revenue tab, you can view any planned gift revenue transactions and the payment transactions applied to the planned gift.

To access a revenue record, in the **Revenue** grid select the record you want to view and click **Go to revenue**. From the revenue record, you can make and save any changes. Click **Back** to return to the Planned Gift record.

Planned Gift Sites

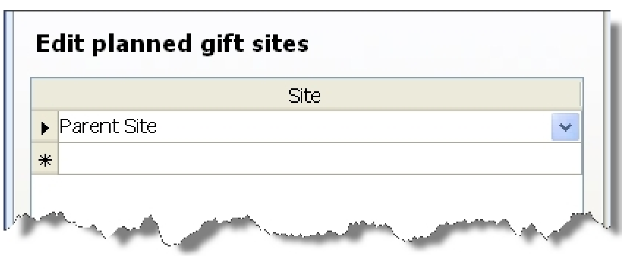
On the Sites tab, you can view and edit any site/location information associated with the planned gift.

Edit Site

From the Sites tab on the planned gift record, you can edit site information associated with the record.

Edit planned gift site information

1. From the Sites tab on the planned gift record, click **Edit**. The Edit planned gift sites screen appears.



2. In the **Site** column, select the site you want to add. To delete an existing site, select the entire row and press **DELETE** on your keyboard.

> ***Note:*** System administrators can add sites to the system using the **Sites** feature located in *Administration*.

3. Click **Save** to save the changes and return to the Sites tab.

Planned Gift Letters

When a prospect makes a gift/payment, you can use **Acknowledgements** to send a letter to thank the prospect for the revenue. On the Letters tab, you can track whether you sent a letter to the prospect and which type of letter the prospect receives. When you run an Acknowledgement process, the program automatically updates the **Letters** grid with the applicable letter information. To view a history of the acknowledgement letters related to a planned gift, select the Letters tab.

Depending on your security rights and system role, you can manage the letters that appear in the **Letters** grid.

Add an Acknowledgement Letter to a Planned Gift

When you run an acknowledgement process to send a letter to thank a prospect for a planned gift, the program automatically tracks information about the letter on the Letters tab of the planned gift record. If necessary, you can manually add an acknowledgement letter to a planned gift. For example, if you hand-write an acknowledgement letter to a prospect, you can add the letter and record the date you mail the letter.

Add a letter to a planned gift

1. From the Letters tab in the planned gift record, click **Add**. The Add a letter screen appears.

> ***Note:*** For information about how to access a planned gift record, see Planned Gift Record on page 388.

2. In the **Letter** field, select the type of acknowledgement letter the prospect receives. If the letter type you require does not appear in the drop-down list, consult your IT Administrator.
3. In the **Acknowledge date** field, enter the date you mail the acknowledgement letter to the prospect.
4. Click **Save**. You return to the Letters tab. In the **Letters** grid, the new acknowledgement letter appears.

Edit Letter Information on a Planned Gift

When you run an acknowledgement process to send a letter to thank a prospect for a planed gift, the program automatically tracks information about the letter on the Letter tab of the planned gift. If necessary, you can edit the information that appears in the **Letters** grid on the Letters tab.

Edit a planned gift letter

1. From the Letters tab in the planned gift record, select the letter entry you want to edit.

> ***Note:*** For information about how to access a planned gift record, see Planned Gift Record on page 388.

2. Click **Edit**. The Edit a letter screen appears. Make any necessary changes.
3. Click **Save**. You return to the Letters tab.

Delete a Letter Action from a Planned Gift

When you remove an acknowledgement letter from a planned gift, you can delete its action from the Letters tab. For example, you hand-write an acknowledgement letter to a prospect but decide to not mail it and instead generate a General Thank You. You can delete the action of the hand-written letter from the planned gift.

Delete a letter action from a planned gift

1. From the Letters tab in the planned gift record, select the letter entry you want to delete.

> ***Note:*** For information about how to access a planned gift record, see Planned Gift Record on page 388.

2. Click **Delete**. A confirmation screen appears.
3. Click **Yes**. You return to the Letters tab. The selected letter no longer appears in the **Letters** grid.

Clear the Process Date and Acknowledge Date for an Letter on a Planned Gift

Once you run an acknowledgement process for a planned gift, you can include the planned gift in another acknowledgement process, such as if the address is incorrect or formatted incorrectly. To include the planned gift in another acknowledgement process, you must first clear the process date and acknowledge date generated from the previous process.

Clear the dates for a letter on a planned gift

1. From the Letters tab in the planned gift record, select the letter entry with the dates to clear.
2. Click **Clear dates**. A message appears to confirm you want to clear the process and acknowledge dates.
3. Click **Yes**. You return to the Letters tab. In the **Letters** grid, the **Process date** and **Acknowledge date** of the selected letter are clear.

Screen Item	Description
Type	Select the type of media link that you are adding. You create **media link types** in **Code Tables** in *Administration*. For more information, see the *Administration Guide*.
Date	Today's date defaults into the **Date** field. Click the down arrow to access the calendar to select another date.
Title	Enter a title for the media link.
Author	To enter an author for the media URL, click the binoculars. The Constituent Search screen appears. On this screen, you can enter the search criteria you want to use in locating the author.
Media URL	Enter the path of the media link in this field.

Planned Gift Campaigns

If designations are associated with the planned gift and specific campaigns are associated with the designations, these campaigns display on the Campaigns tab. From this tab you can go to the campaign record or edit the campaigns associated with the designation - adding additional campaigns, changing a campaign, or deleting a campaign.

Go to Campaign Record

To open a campaign record associated with a designation that is included in a planned gift record, from the planned gift record, select the Campaigns tab. In the **Campaigns** grid, select the campaign you want to open and click **Go to campaign**. The campaign record displays, and you can make any necessary changes.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about how to access a prospect planned gift record, see Planned Gift Record on page 388.

Edit Campaigns

From the planned gift record, you can change the campaigns associated with the gift.

Edit campaign associated with planned gift

1. From the planned gift record, select the Campaigns tab.
2. Click **Edit campaigns**. The Edit planned gift designation screen appears.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*. For information about how to access a prospect planned gift record, see Planned Gift Record on page 388.

3. In the **Campaign** column, click the binoculars at the end of the field to access the Campaign Search screen. From here, you can locate the campaign you want to add.
4. If subpriorities are established for the campaign, you can select a specific subpriority or goals in the **Campaign subpriority** column.
5. To delete and entry, select the entire row and press **DELETE** on your keyboard.

6. Click **Save**. You return to the Campaigns tab.

Edit Planned Gift Designation Campaigns Screen

This screen displays all campaigns currently associated with the planned gift designation. To change or add a campaign, click the binoculars in the **Campaign** column. The Campaign Search screen appears, and you can locate a new campaign.

In the **Campaign subpriority** column, you can select a subpriority - if any exist - for the corresponding campaign.

Note: For information about working in a campaign record, see the Fundraising Campaigns chapter in the *Fundraising Guide*.

Edit Planned Gift Designation Screen

Screen Item	Description
Designation	Select the constituent’s desired use for the money. For example, a prospect agrees to a bequest of $100,and wants half to go to the Building fund and the other half to the Lab fund. Click the binoculars at the end of the field in the **Designation** column. A search screen appears. Locate the “Building” fund. In a new row in the **Designation** column locate the “Lab” fund.
Amount	Enter the amount the prospect wants allocated to each designation. If the constituent wants the total gift split evenly between the two designations, click the **Distribute evenly** button.
Category	You can further allocate the money to a specific category within the designation. **Category** entries are defined in **Code Tables** in *Administration*. See the **Use code** description below for more information.
Use code	If your organization includes **Use codes** with its designations, you can enter the code in this column. In addition, **Use codes** can be helpful if the real designation for the planned gift is not yet available. For example you receive a bequest to create a scholarship fund, but you do not expect to get the money for another 30 years. In this case, you do not want to create the scholarship fund account yet, so instead you use an existing broader designation, such as College fund, as a placeholder designation. You can then create a **Use Code** and **Category** to capture the real designation. Entries are defined in **Code Tables** in *Administration*
Date added	Enter the date you added the designation to the planned gift.

Planned Gift Additions

Certain types of planned gifts can have additions. You can use the tab to track additions or modifications to the original planned gift. For example, a donor may set up a bequest for a certain amount and later modify it to include more than the initial amount. In this case, you would have the original planned gift for the initial amount. You would also go to the Additions tab of the bequest and add the additional amount. Additions to planned gifts can have their own designations and assets.

The Additions tab appears on the planned gift record for planned gifts of type:

- Charitable remainder unitrust
- Charitable lead unitrust
- Pooled income fund
- Life insurance
- Bequest
- Retirement plan assets
- Testamentary charitable trust
- Living trust
- Other

Other types of planned gifts cannot have additions. If a donor’s planned gift was a charitable gift annuity or a outright gift, for example, you would need to create a second planned gift rather than an addition on the original planned gift.

> ***Note:*** Additions must be of the same planned gift type as the original planned gift. If the donor has a planned gift of a different type, you would create a second planned gift rather than an addition on the original planned gift.

Add a planned gift addition

1. From a planned gift that allows additions, select the Additions tab.
2. On the Additions tab, click **Add**. The Add a planned gift addition screen appears.
3. In the **Gift amount** and **Recognition amount** fields, enter the amount of the addition along with the recognition credit amount.
4. Enter the date of the addition.
5. **Do not receipt** matches the setting on the planned gift. It may be editable:

   If you configure planned gift receipts for specific vehicle types from the Major Giving Setup page, **Do not receipt** is enabled for planned gifts with those vehicle types. But if **Revocable** or **Trust held outside** are selected, **Do not receipt** is selected and disabled.
6. In the Planned Gift Addition Details grid, search for and select the designations to which to apply the gift amount.
7. In the Assets grid, enter any assets to associate with the addition. For information about the fields in the grid, see Assets Tab on page 289.
8. Click **Save**. You return to the Additions tab.

Edit Planned Gift Addition

Edit a planned gift addition

1. From a planned gift that allows additions, select the Additions tab.
2. On the Additions tab, select the addition and click **Edit**. The Edit a planned gift addition screen appears.
3. In the **Gift amount** and **Recognition amount** fields, enter the amount of the addition along with the recognition credit amount.
4. Enter the date of the addition.
5. **Do not receipt** matches the setting on the planned gift. It may be editable:

   If you configure planned gift receipts for specific vehicle types from the Major Giving Setup page, **Do not receipt** is enabled for planned gifts with those vehicle types. But if **Revocable** or **Trust held outside** are selected, **Do not receipt** is selected and disabled.
6. In the Planned Gift Addition Details grid, search for and select the designations to which to apply the gift amount.
7. In the Assets grid, enter any assets to associate with the addition.
8. Click **Save**. You return to the Additions tab.

Delete Planned Gift Addition

Delete a planned gift addition

If no revenue has been added for the planned gift addition, you can delete the addition. On the Additions tab of the planned gift, select the addition and click **Delete**.

Planned Gift Addition Details

On the planned gift addition record, you can view information about the addition, such as the designations and amounts for the addition, the assets, and the campaigns. Changing the designations, assets, and campaigns for an addition is the same as for a planned gift. For more information, see:

- Edit Planned Gift Details on page 389
- Planned Gift Assets on page 393
- Planned Gift Campaigns on page 400

History

From a planned gift record, click the **History** link displayed in the **More information** pane on the explorer bar. The Planned Gift History page appears displaying revenue addedto the planned gift, as well as any associated payments. You can filter information displayed on this page by selecting a specific **User**, one of the **Actions**, and/or a **Date**. If you select any of these filtering criteria, click the **Apply** button to refresh your display. Click **Reset** to return to the original display.

Note: You can also access the history of a planned gift addition. From a planned gift addition, click **History** under **More information**.

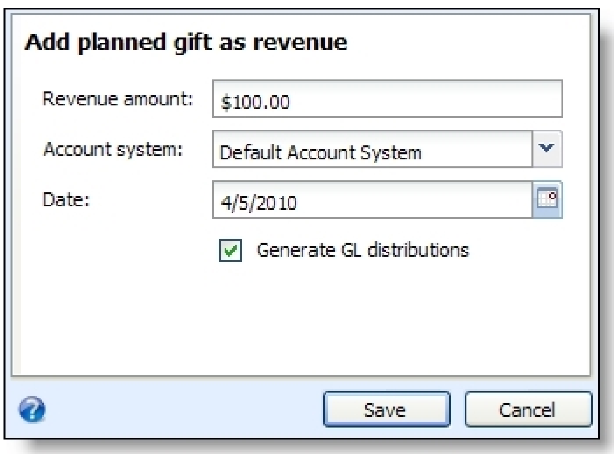
Add a Planned Gift as Revenue

Note: The **Add a Planned Gift** option displays under **Tasks** only if the planned gift **Status** is set to "Matured."

To add a planned gift as revenue, the planned gift must have a status of Accepted and apply toward at least one designation entry. There are additional requirements based on the vehicle type. For more information, see Planned Gift Vehicle Types: Requirements to Add Planned Gifts as Revenue on page 288. On the planned gift record, **Add as revenue** appears under **Tasks** only when the required criteria are satisfied. When you add a planned gift as revenue, you can select whether to generate general ledger distributions for the gift.

Add a planned gift as revenue

1. Access the record of the planned gift to add as revenue. For information about how to access a planned gift record, see Planned Gift Record on page 388.
2. Under **Tasks**, click **Add as revenue**. The Add planned gift as revenue screen appears.



3. In the **Revenue amount** field, the total gift amount appears. Edit the amount of the revenue transaction as necessary.
4. If the planned gift is set to produce a receipt, the **Receipt amount** field appears.
5. If your organization configures multiple general ledger account systems and you have rights to multiple account systems, the **Account system** field appears. Select the account system to which to apply the revenue.
6. Select whether to generate general ledger distributions for the revenue transaction. On the revenue record, distributions appear on the GL distributions tab.

   To generate distributions at a later date, do not select **Generate GL distributions**.

7. If the planned gift is set to produce a receipt, the **Do not receipt** field appears. If this was set in error, you can select **Do not receipt** to correct the setting on the planned gift.
8. Click **Save**. The revenue record of the planned gift appears.

   For information about the revenue record, see the *Revenue Guide*.

Stewardship

Stewardship is a means to cultivate relationships with constituents who currently contribute to your organization or who may contribute in the future. To initiate and manage contact with constituents, you can create stewardship plans. A stewardship plan is a series of steps that plan stewards complete as part of the stewarding process. Each plan details how often plan stewards should contact the constituent, the contact method, and the objective. A plan also provides information about the constituent so stewards can coordinate personal and meaningful interactions.

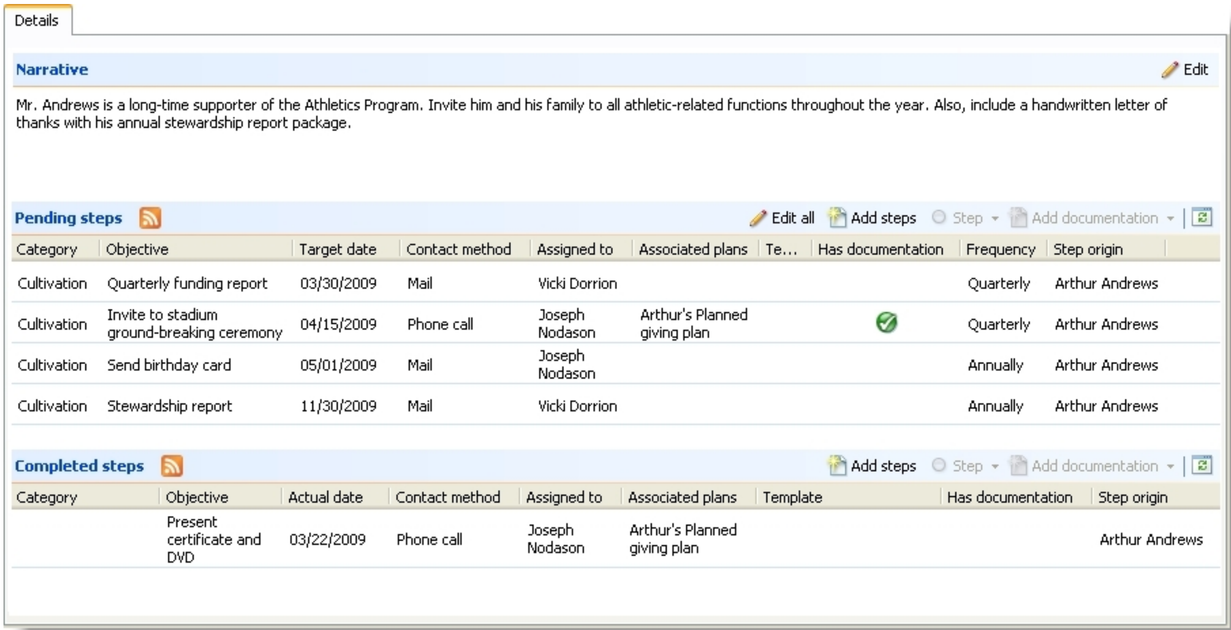
If you configure stewardship packages for your fundraising purposes, you can add a plan step to create and distribute a package to donors on a regular basis to demonstrate what your organization accomplished with the donor's gifts. A stewardship package is a mail merge process that includes a cover letter and a stewardship report. For information about stewardship packages, see the *Fundraising Guide*.

Stewardship Plan Page

The Stewardship Plan page tracks your organization's stewardship activity related to the constituent and provides information to help the plan's stewards make interactions personal and meaningful. For constituents who have a stewardship plan, click **Stewardship plans** under **More information** on the constituent record to access the Stewardship Plan page. All of the stewardship plans for the constituent are displayed. You can go to an individual stewardship plan to view more details about the plan, including plan steps. You can also add and delete stewardship plans from the constituent.

Details

The Details tab displays the plan's objective and the pending and completed plan tasks. From this tab, you can view and manage the steps associated with the stewardship plan.



From **Narrative**, you can enter notes or comments about the plan. The **Pending steps** grid lists plan steps that have not occurred. From this grid, you can add, edit, or delete steps, as well as add documentation or media links to selected steps. The **Completed steps** grid lists the steps you marked as complete. From this grid, you can add, edit, delete, or attach documents or links to steps.

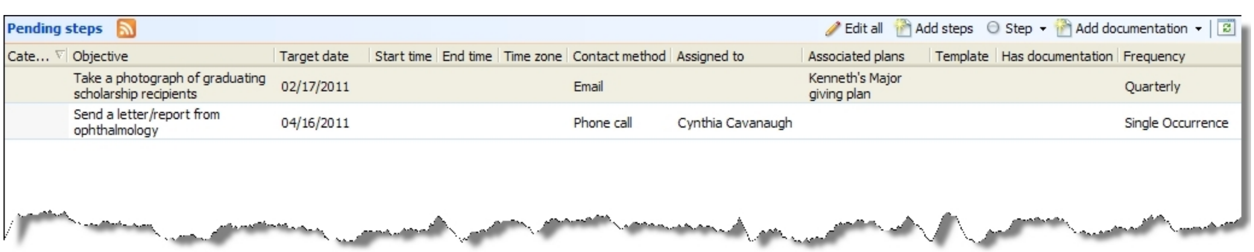
Edit Narrative

In the **Narrative** frame of the Details tab, you can access a text editor and enter the plan's purpose or other information. Click **Edit** and the Edit plan narrative screen appears. You can enter notes about the plan at any time.

Pending Steps

From **Pending steps** on the Details tab, you can add plan steps from a template, create new steps, assign steps to specific stewards, and attach important notes, links, or files to a step. For organizations that have subsidiaries, select **View subsidiaries** to include pending steps from each subsidiary's stewardship plan in the grid. This provides a complete view of current and future stewardship activity across the organization.

Pending and completed stewardship steps are also displayed on the constituent's interactions page. From the constituent, click **Interactions** under **More information**.



You indicate an organization is a parent corporation from the Relationships tab of the organization's content record. For information about adding organization relationships, see the *Constituents Guide*.

You indicate an organization is a parent corporation from the Relationships tab of the organization's content record. For information about adding organization relationships, see the Relationships section of the help file.

Note: To notify stewards about upcoming stewardship assignments, a system administrator can configure a calendar synchronization process to generate calendar items in Microsoft *Outlook* for pending steps. For information about how to create a calendar synchronization process, see the *Exchange Integration Guide*.

Completed Steps

From **Completed steps** on the Details tab, you can view plan steps that have been completed. You can also add steps the plan's stewards performed that were not previously included in **Pending steps**, manage these steps, and add notes, links, or files related to a step.

Pending and completed stewardship steps are also displayed on the constituent's interactions page. From the constituent, click **Interactions** under **More information**.

For organizations, select **View subsidiaries** to include completed steps from each subsidiary's stewardship plan in the grid. This provides a complete view of stewardship activity performed across the organization.

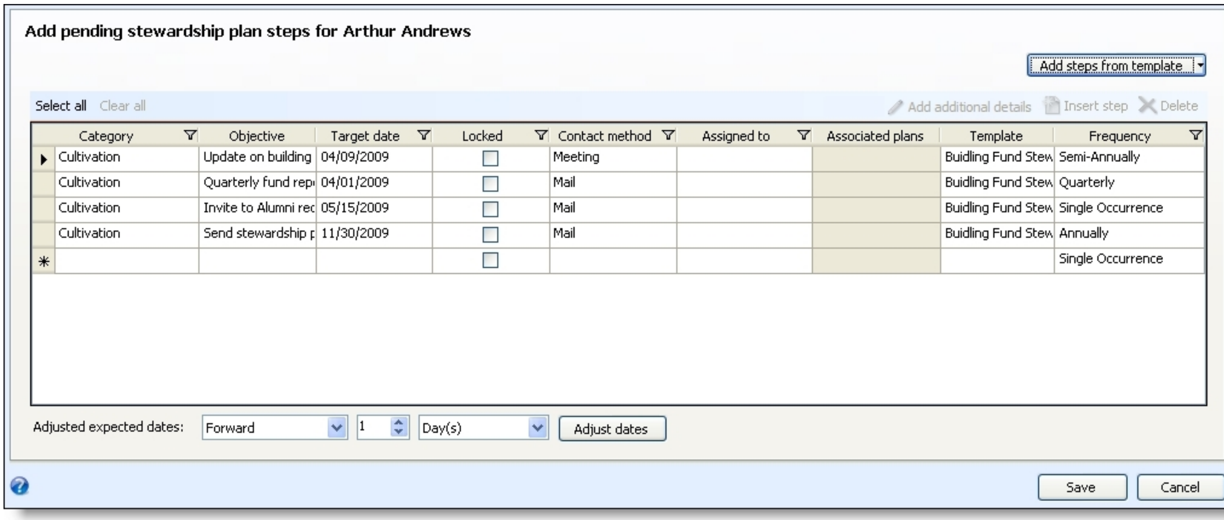
Add Stewardship Steps

From **Pending steps** or **Completed steps** on the Stewardship Plan page, you can import steps from predefined templates or you can add individual steps to the stewardship plan. You can then customize each step.

Note: For organizations, you can select to view steps added to a subsidiary's stewardship plan from the Details tab of the parent corporation's stewardship plan. This allows you to view stewardship activity for all areas of the company from the parent corporation's plan.

Add pending or completed steps to a stewardship plan

1. In the **Pending steps** or **Completed steps** grid on the Details tab of the Stewardship Plan page, click **Add steps**. An Add stewardship plan steps screen appears.



2. Enter the necessary information. For a detailed explanation of the options on this screen, see Add Pending or Completed Stewardship Plan Steps Screen on page 409.

   Pending and completed stewardship steps are also displayed on the constituent's interactions page. From the constituent, click **Interactions** under **More information**.

3. Click **Save**. You return to the Stewardship Plan screen.

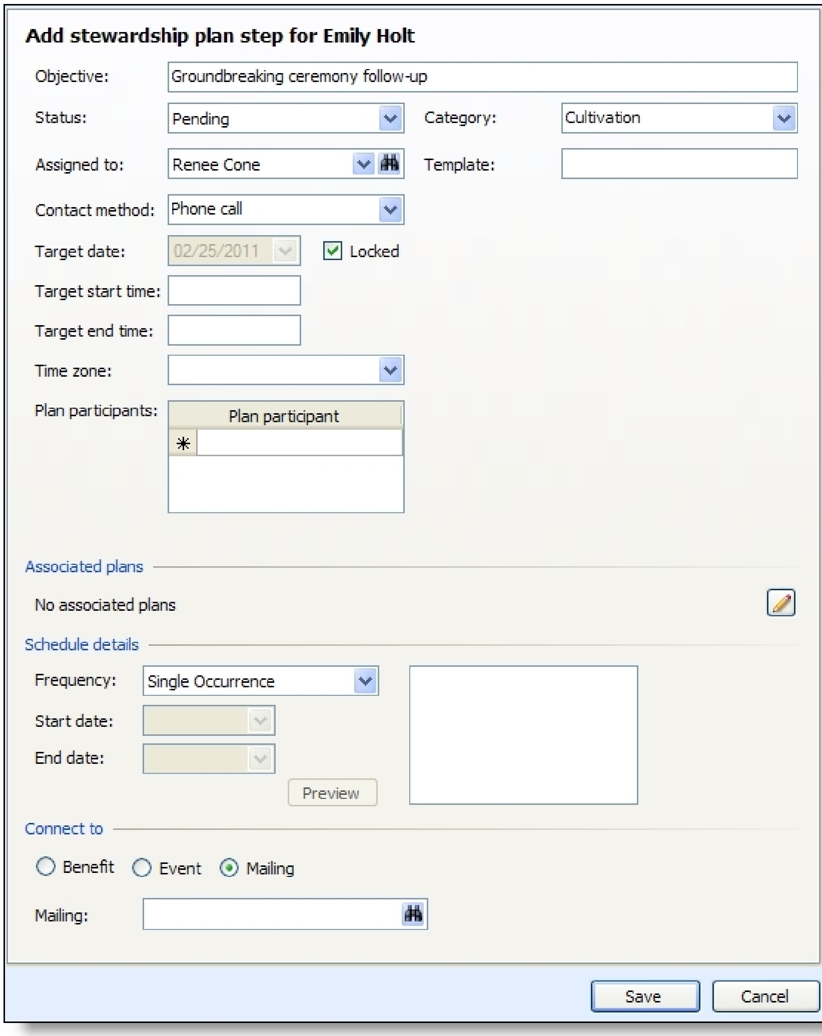
Add Pending or Completed Stewardship Plan Steps Screen

Screen Item	Description
Add steps from template	Click to select the template to add to this plan. The template steps appear in the grid. When available, you can filter the grid by sites. If no templates exist, this button is not available. You must manually add steps to the plan.
Category	Enter a category for the step.
Objective	Enter the purpose for the step.
Target date	Enter the date when the step should occur.
Locked	Select to disable date fields for the step. When you move the dates forward or backward in the **Adjust expected dates** fields, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step. The program automatically creates a stewardship plan for the contact and adds the step to the contact's plan.
Contact method	Enter how to contact the constituent for this step.

Screen Item	Description
Assigned to	Select a steward to perform the step. If you enter a constituent who is not a steward, the program adds the individual to the stewardship plan's Stewards tab.
Associated plans	Displays the name of the prospect plan associated with the step or the number of plans if you linked the step to more than one.
Template	Enter the name of the template associated with the step. When you add steps from a stewardship plan template, the name of the template automatically appears in this column.
Frequency	Select how often the step occurs.
Step origin	Displays the name of the constituent you originally added the step for in this plan. For example, if you select to view plan steps for subsidiary organizations on a parent organization's stewardship plan, you can easily determine the steps associated with each organization from the **Step origin** column.
Adjust expected dates	Select the steps that require target date updates. From **Adjust expected dates**, select "Forward" or "Backward." Enter the interval of time in days, weeks, or months. To apply your changes, click **Adjust dates**. You cannot adjust locked dates.
Add additional details	Click **Add additional details** to access the Add or Edit stewardship plan screen. From here, you can add details for the step, such as associating prospect plans with steps.
Insert step	Click **Insert Step** to add a step to the template. If you select a current row in the grid and click **Insert Step**, a row appears above the row you select.
Delete	Select a row in the grid and click **Delete** to remove the step.

Add a new step from the Add stewardship plan steps screen

1. From the Add stewardship plan steps screen for pending or completed steps, click **Add additional details**. The Add stewardship plan step screen appears.



2. Enter the necessary information. For a detailed explanation of the options on this screen, see Add Stewardship Plan Step Screen on page 411.
3. Click **Save**. You return to the Stewardship plan steps page.

Add Stewardship Plan Step Screen

Screen Item	Description
Objective	Enter the purpose for the step.
Status	If you select "Completed," when you click **Save** the step moves to **Completed steps**.
Assigned to	Enter a steward to perform the plan step. When you assign a step to a constituent other than a current plan steward, the program adds the individual as a steward on the stewardship plan's Stewards tab.

Screen Item	Description
Target date	Enter the date when the step should occur.
Target start time	Enter the target start time.
Target end time	Enter the target start time.
Time zone	Specify a time zone to associate with this step.
Plan participants	Select constituent participants to associate with this step. Click the binoculars to access the Constituent Search screen.
Locked	Select locked if the step has a fixed date.
Category	Enter a category for the step.
Template	When you add plan steps from a template, the template name appears in this field.
Contact method	Enter how to contact the constituent for this step.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step. The program automatically creates a stewardship plan for the contact and adds the step to the contact's plan.
Associated plans	For major giving prospects, click **Edit plans** to link the step to any of the constituent's prospect plans that resulted in an accepted opportunity. Select **Associated** for each plan you do not want to associate with the step. When you click **OK**, the step appears on the Stewardship Steps tab of the selected prospect plans. Linked steps inherit security settings from the prospect plan, so users who do not have permission to view the prospect plan cannot view stewardship steps linked to the plan.
Schedule details	Select how often the step occurs in **Frequency**. You can then enter the start and end dates for the step. Click **Preview** to view the dates for the step based on the frequency you selected.
Connect to	Select the **Benefit**, **Event**, or **Mailing** to associate with the step. The linked item name appears with the Details tab of the Step page. When you link to a specific item, the steward knows immediately which benefit or mailing to send to the constituent or which event is related to the step.

Add Documentation to a Step

You can attach specific types of documents to a step. Details for all documents attached to the plan steps appear on the Documentation tab.

Edit All Steps

From the **Planned and pending steps** grid on the Details tab of the Stewardship Plan page, you can edit individual steps or all steps in the plan. For organizations, you can choose to edit plan steps for only the organization or you can include plan steps for the organization's subsidiaries.

Edit all steps in a stewardship plan

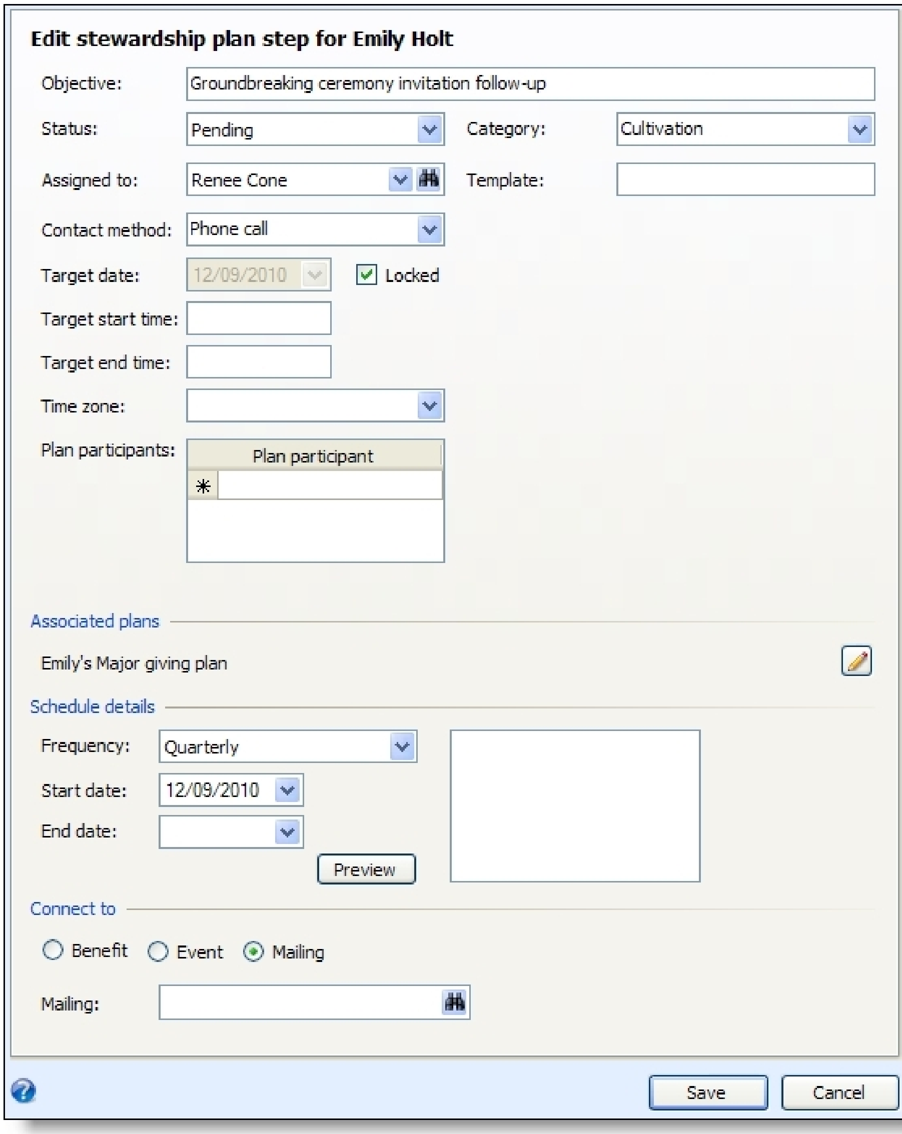
1. In the **Planned and pending steps** grid on the Details tab of the Stewardship Plan page, click **Edit all**. The Edit pending stewardship plan steps screen appears.
2. Enter the necessary information. For a detailed explanation of the options on this screen, see Add Pending or Completed Stewardship Plan Steps Screen on page 409.
3. Click **Save**. You return to the Details tab.

Edit Steps

You can edit individual steps to customize the plan for the constituent.

Edit a stewardship step

1. From the Details tab of the Stewardship Plan page, select a step.
2. Click **Step**, **Edit**. The Edit stewardship plan step screen appears.



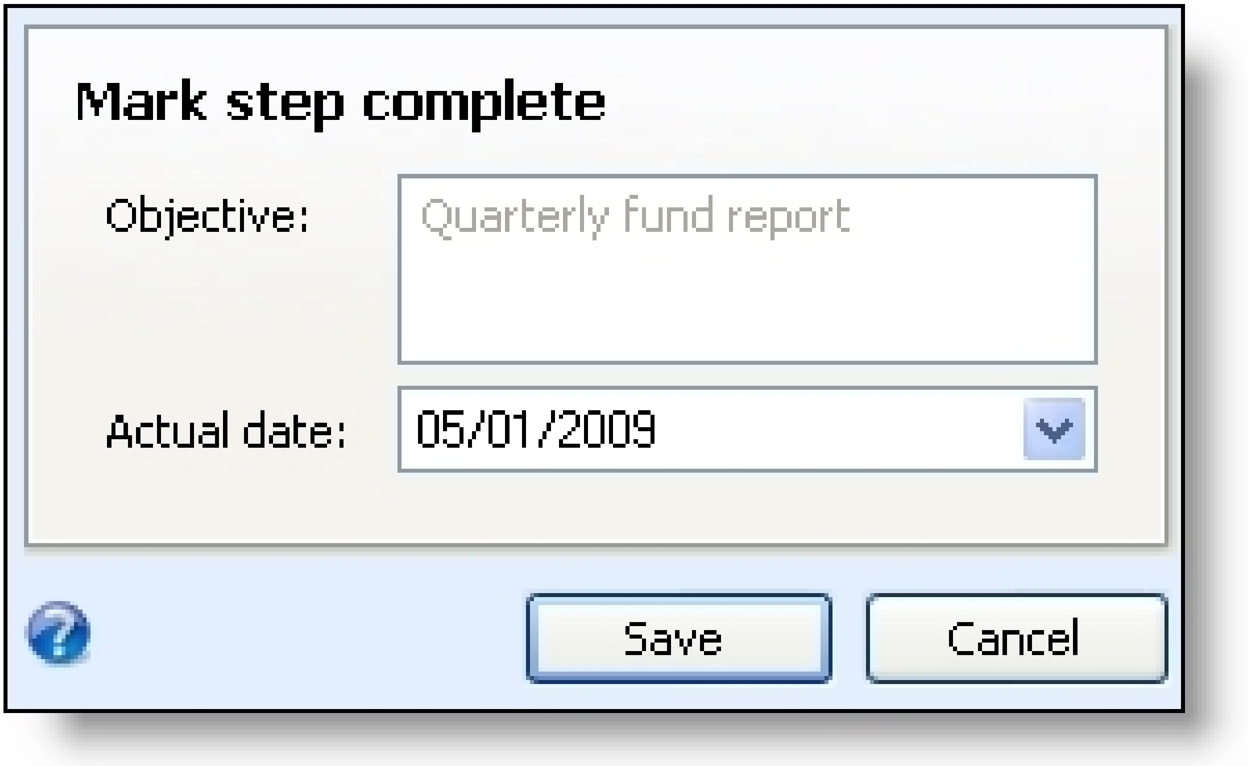
3. Enter the necessary information. The items on this screen are the same as the Add a stewardship plan step screen. For more information, see Add Stewardship Plan Step Screen on page 411.
4. Click **Save**. You return to the Stewardship Plan page.

Complete Steps

Under **Planned and pending steps** on the Details tab of the Stewardship Plan page, you can mark a step as complete. The step moves to the **Completed steps** grid.

Mark a step complete

1. In the **Planned and pending steps** grid on the Details tab of the Stewardship Plan page, select a step.
2. Select Step, **Mark complete**. The Mark step complete screen appears.



3. Enter the Date the step was completed.
4. Click **Save**. You return to the Details tab.

Delete Steps

From the **Planned and pending steps** or **Completed steps** grids on the Details tab of the Stewardship Plan page, you can delete plan steps.

Delete a stewardship step

1. From the Details tab of the Stewardship Plan page, select the step to delete.
2. Click **Step**, **Delete**. A confirmation screen appears.
3. Click **Yes**. You return to the Stewardship Plan page.

Benefits and Interests

From the **Benefits** grid on the stewardship plan's Benefits and Interests tab, you can view all benefits the constituent has received from your organization. The information in this grid is read-only. From the **Interests** grid, you can view and manage information about activities or pursuits the constituent enjoys.

For information about how to create and associate benefits with gifts, see the Revenue Records chapter of the *Revenue Guide*.

Benefits

From **Benefits**, you can view all items the constituent has received for donations made to your organization. For example, if the constituent gave in response to an appeal that has benefits defined, or if you manually added a benefit to a revenue record for the donor's gift, the benefit details appear in this grid. This information is read-only.

Interests

To maintain meaningful contact with constituents, you can capture hobbies, pursuits, or areas of interest that apply to donors. For example, if you know that a constituent enjoys photography, you can add stewardship plan steps related to this field, such as sending the donor tickets to a photography exhibit. Your entries in the **Interests** grid also appear in the **Interests** grid on the Details tab of the constituent record.

Add a constituent interest

1. In the **Interests** grid on the Benefits and Interests tab, click **Add**. The Add interest screen appears.
2. In the **Type** field, enter an interest for the constituent.
3. In the **Comments** field, enter details.
4. Click **Save**. You return to the Benefits and Interests tab.

Purposes

The Purposes tab contains information about purposes the constituent contributed to or established. From the **Purposes donated to** grid, you can view information about the constituent's contributions and go directly to a purpose record. A checkmark in the Founder column indicates the constituent is a benefactor for the purpose. Benefactors are donors who establish a fundraising purpose.

Note: You can identify benefactors for only fundraising purposes based on fundraising purpose types that include donor and financial information. For information about how to configure fundraising purpose types, see the *Fundraising Guide*. For information about assigning benefactor status to a donor, see the Fundraising Purposes chapter of the *Fundraising Guide*.

Recognition Programs

If an individual, organization, or household's donations qualify the constituent for a recognition program, this information appears on the Recognition Programs tab. From the Recognition Programs tab, you can add recognitions, make recognitions inactive, or remove recognition programs from the constituent's record.

Add Recognitions

You can add a recognition to the constituent.

Add a Constituent Recognition Screen

Screen Item	Description
Recognition program	Select a recognition program.
Recognition level	Select the level of the recognition program to apply to the constituent.
Date achieved	Enter the date the contestant reached this level.
Comments	Enter any details about the recognition.
Anonymous	Select if the donor does not want to be publicly recognized.

Remove Recognitions

If a recognition program no longer applies to the constituent, you can make the recognition inactive or delete it from the constituent's stewardship record. To keep the recognition details on the stewardship record but not apply the recognition, click **Drop** on the action bar. The status of the recognition changes to "Dropped." To restore the recognition, click **Go to recognition** to open the recognition record. From **Tasks**, click **Make active**. The status changes from "Dropped" to "Active."

To delete the recognition from the constituent's stewardship record, click **Delete** on the action bar. When you delete a recognition, you remove the entry from this tab and the information no longer appears on the Recognition Programs tab of the constituent's giving recognition record.

Stewards

The Stewards tab on the Stewardship Plan page lists all fundraisers associated with the plan and their stewardship roles, if defined. From this tab, you can select to go to a selected steward's constituent record, edit the stewards assigned to the plan or change a steward's role, and you can delete a steward from the plan.

If a plan steward has a constituency of "Fundraiser," any assigned stewardship steps also appear on the steward's My Fundraiser page in *Prospects*. On the navigation bar, select **Prospects**, **My fundraiser page** to view this information.

Note: If your system administrator configures an Exchange server to create calendar items for pending stewardship plan steps, this information appears on the steward's Outlook calendar.

Add Plan Stewards

You can add stewards to a plan.

Add a steward

1. From the Stewards tab on the Stewardship Plan page, click **Add.** The Add a steward screen appears.
2. Search for and select a steward.
3. Select a role for the steward such as "Primary steward" or "Secondary steward."
4. If known, enter start and end dates.
5. Click **Save**. The steward appears on the Stewards tab on the Stewardship Plan page.

Manager History

The Manager History tab on the Stewardship Plan page lists historical managers associated with the plan and their start and end dates. From this tab, you can select to go to a selected manager's constituent record, edit the managers previously assigned to the plan, and you can delete a manager from the plan.

Edit Historical Stewardship Plan Manager

You can delete historical stewardship plan managers when necessary.

Edit historical stewardship plan manager

1. On the Manager History tab of the Stewardship Plan page, highlight an historical manager and click **Edit**. The Edit historical stewardship plan manager screen appears.
2. Adjust the start and end dates as necessary.
3. Click **Save**. You return to the Manager History tab.

Delete Historical Stewardship Plan Manager

You can delete historical stewardship plan managers when necessary.

Delete an attachment

1. Open the record with the attachment to delete.

2. Select the Documentation tab.
3. Under **Documentation**, select the attachment to delete.
4. On the action bar, click **Delete**. A message to appears to ask whether to delete the attachment.
5. Click **Yes**. You return to the Documentation tab.

Edit Plan Manager

You can assign a new manager to a stewardship plan from the Stewardship Plan page. You can select a constituent currently associated with the plan or search for a new manager.

Change the manager assigned to the stewardship plan

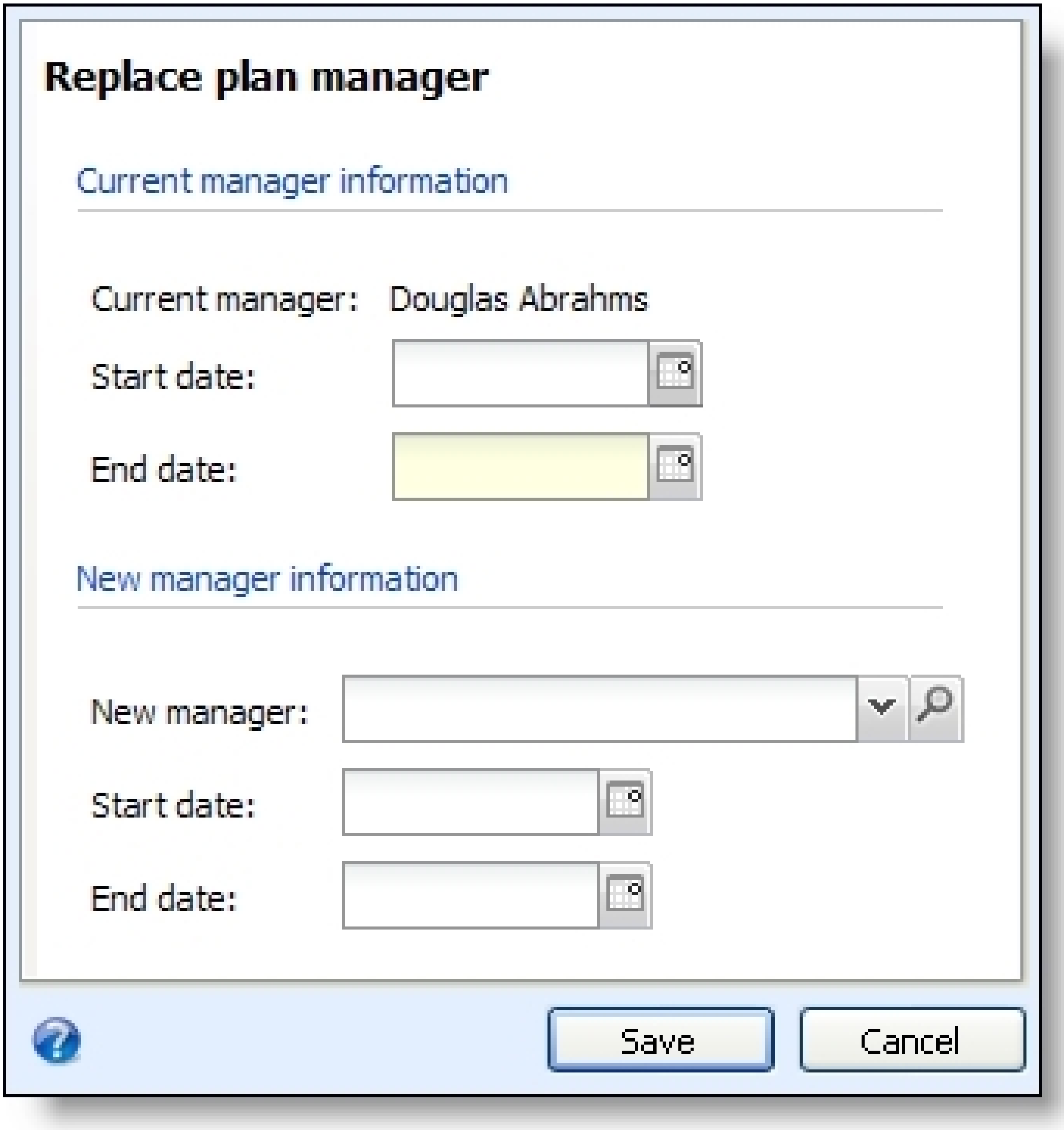
1. Under **Tasks** on the Stewardship Plan page, click **Edit plan manager**. The Edit stewardship plan manager screen appears.
2. Enter a new name in **Manager**.
3. Select the start and end dates as necessary.
4. Click **Save**. You return to the Stewardship Plan page.

Replace Plan Manager

You can replace a plan manager for a stewardship plan from the Stewardship Plan page. You can select a constituent currently associated with the plan or search for a new manager. When you replace a plan manager you can specify the start and end dates for the current plan manager and the start date for the new plan manager.

Replace the manager assigned to the stewardship plan

1. Under **Tasks** on the Stewardship Plan page, click **Replace plan manager**. The Replace plan manager screen appears.



2. Enter the start date for the current manager if necessary.
3. Enter the end date for the current manager.
4. Enter a name in **New manager**.
5. Enter start and end dates for the new manager if known.
6. Click **Save**. You return to the Stewardship Plan page.

Delete Stewardship Plans

If you no longer need a stewardship plan for a constituent, you can permanently remove the plan. To delete a stewardship plan, open the plan you want to remove and click **Delete plan** under **Tasks**.

Add Stewardship Plans

From *Prospects*, you can create a stewardship plan for any constituent. Click **Stewardship plan** under **More information** on the constituent record to access the plan. If the constituent is also a prospect, the plan appears on the Plans tab of the prospect record.

Add a stewardship plan for a constituent

1. On the navigation bar, select **Prospects**, **Add stewardship plan**. The Add stewardship plan screen appears.

> ***Note:*** You can create a stewardship plan for any constituent in your database. Although you create stewardship plans in *Prospects*, the constituent does not have to be a major giving prospect.

2. Enter the necessary information. For a detailed explanation of the options on this screen, see Add Pending or Completed Stewardship Plan Steps Screen on page 409.
3. To add and edit plan steps, select the Plan steps tab. For more information about items on this tab, see Add Pending or Completed Stewardship Plan Steps Screen on page 409.
4. Click **Save**.

Add Stewardship Plan Screen

Screen Item	Description
Constituent	Enter the constituent to steward. You can select any individual, organization, group, or household in your database, not just major giving prospects.
Manager	Enter a constituent to coordinate the efforts of the plan's stewards. There is a **Start date** field next to **Manager**. This is the manager's start date, not to be confused with **Start date** for the stewardship plan.
Plan type	Select a plan type to further define the stewardship plan.
Plan subtype	Select a plan subtype to further define the stewardship plan.
Start date	Select a start date for the stewardship plan. The other **Start date** field on this screen is for the manager.

Screen Item	Description
Stewards	In the **Plan stewards** column, enter each constituent associated with the plan. In the **Role** column, select the steward's role for this plan. If you have numerous steps, you may need to assign multiple stewards to the plan.
Sites	You can associate the stewardship plan with one or more sites, if needed. For example, different sites within your organization may collaborate when deciding how to steward an important donor.

Edit Stewardship Plan Details

Once you add a stewardship plan, you can edit the details, such as the plan name and the plan manager. From a stewardship plan, click **Edit plan details** under **Tasks**.

Search for Constituents with Stewardship Plans

You can locate a constituent's stewardship plan from the Stewardship Plan Search page. To access this page, select **Prospects**, **Stewarded donor search** from the navigation bar. Enter the search criteria for the constituent linked to the plan, such as name or address, then apply any combination of the available filters. Click **Search** to locate the stewardship plans that meet your criteria.

Select the constituent whose plan you want to view and click **Select** to open the Stewardship Plan page. You can also add a stewardship plan for a constituent from the Stewardship Plan Search page.

Add Stewardship Plans on page 421

Stewardship Plan Page on page 406

Step Page

From the Step page, you can view information about a stewardship plan step and customize the details. You can also link the step to a benefit, event, or mailing you previously created.

To access the Step page, from the **Pending steps** or **Completed steps** grids on the Details tab, select a step and click **Step**, **Go to step**.

Details

The Details tab displays information about the step. From this tab, you can manage step details. For information about how to edit a step, see Edit Steps on page 413. To show that a steward has performed the step, click **Mark complete**.

Documentation

From the Documentation tab, you can view and add notes to track helpful or interesting pieces of information related to a step. You can save links to relevant websites or related materials stored outside of the program or include attachments. When you attach a file, a copy of the file is stored in the database.

Plan Step Attributes

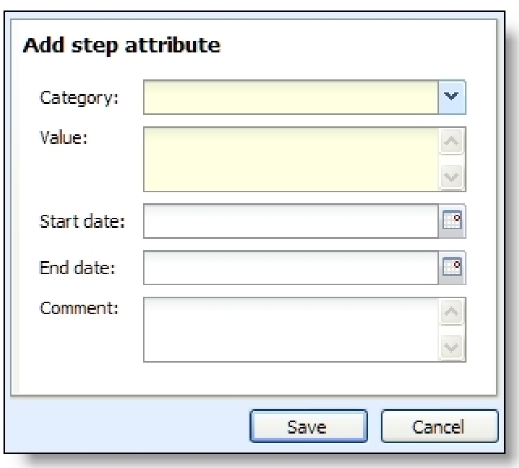
You can use attributes to store specialized information about a plan step when no field or tab exists for that information. Attributes help track the plan step information that best meets your organization's needs. For example, you may use attributes to record the interests of the prospect discussed during an interaction. To view the attributes associated with a plan step, select the Attributes tab.

Note: The Attributes tab appears only if your system administrator configured applicable attributes. For information about how to add attribute categories, see the *Administration Guide*.

Under **Attributes**, you can view attributes assigned to the plan step. For each attribute, you can view its value, group, and valid date range. You can also view any comments entered about the attribute. From the grid, you can also manage the attributes assigned to the stewardship plan step.

Add attributes for a plan step

1. On the record of the plan step to which to add an attribute, select the Attributes tab.
2. Under **Attributes**, click **Add** on the action bar. The attribute screen appears.



3. In the **Category** field, select the type of attribute to assign to the plan step. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the plan step.
5. If the attribute applies to the plan step for a specific duration, select the start and end dates of the attribute.
6. In the **Comment** field, enter any additional information to record about the attribute.

7. Click **Save**. You return to the Attributes tab.

Edit a plan step attribute

1. On the record of the plan step with the attribute to edit, select the Attributes tab.
2. Under **Attributes**, select the attribute to edit and click **Edit** on the action bar. The Edit step attribute screen appears. The items on this screen are the same as the Add step attribute screen.
3. Edit the information as necessary.
4. Click **Save**. You return to the Attributes tab.

Delete a plan step attribute

1. After you add an attribute to a plan step, you can delete it as necessary. To delete an attribute from the record of a plan step, on the Attributes tab, select the attribute to delete.
2. On the action bar, click **Delete**.
3. When a message appears to ask whether to delete the attribute, click **Yes**. You return to the Attributes tab.

Delete Steps

If you no longer need a stewardship plan step, you can remove it from the plan. To delete a stewardship step, click **Delete** under **Tasks**. The step no longer appears on the stewardship plan's Details tab.

Pending Step Notifications

To make certain stewards receive notification of upcoming stewardship assignments, a system administrator can create a calendar synchronization process that includes pending stewardship plan steps. When run, the synchronization process creates and updates calendar items for pending steps in Microsoft *Outlook*.

For information about how to create a calendar synchronization process, see the *Exchange Integration Guide*.

View Stewardship Plans

You can access stewardship plans from *Constituents* and *Prospects*.

- From a constituent record in *Constituents*, if the constituent has a stewardship plan, click **Stewardship Plans** under **More information**.
- From a prospect record in *Prospects*, if the constituent's prospect plan has an accepted opportunity, click **Stewardship plans** under **More information**.
- From the Prospects page, click **Stewardship plan search** to search for a specific plan.

- From various areas in *Prospects*, click **Go to Stewardship plan**.

View as Links on the Stewardship Plan Page

In the explorer bar, **View as** contains links to other areas where the constituent has a record. For example, **Constituent** provides easy access to the donor's constituent information, such as phone numbers, addresses, spouse name, and other personal data. To return to the constituent's stewardship plan, from the constituent view, click **Stewardship** under **More information**.

Manage Stewardship Plans in Bulk

To more easily manage multiple stewardship plans and steps at once, you can add plans and steps in bulk. You can add a new plan to a group of constituents. You can also add a new step to an existing plan for a group of constituents.

Add Stewardship Plans in Bulk

With **Add Plans and Steps Process**, you can create stewardship plans for a selection of constituents. For example, you want to associate stewardship plans to many constituents, and you do not want to go through the extra work involved to create plans specific to each individual. Instead, you want to define a plan and automatically assign the same plan to all constituents included in your selection.

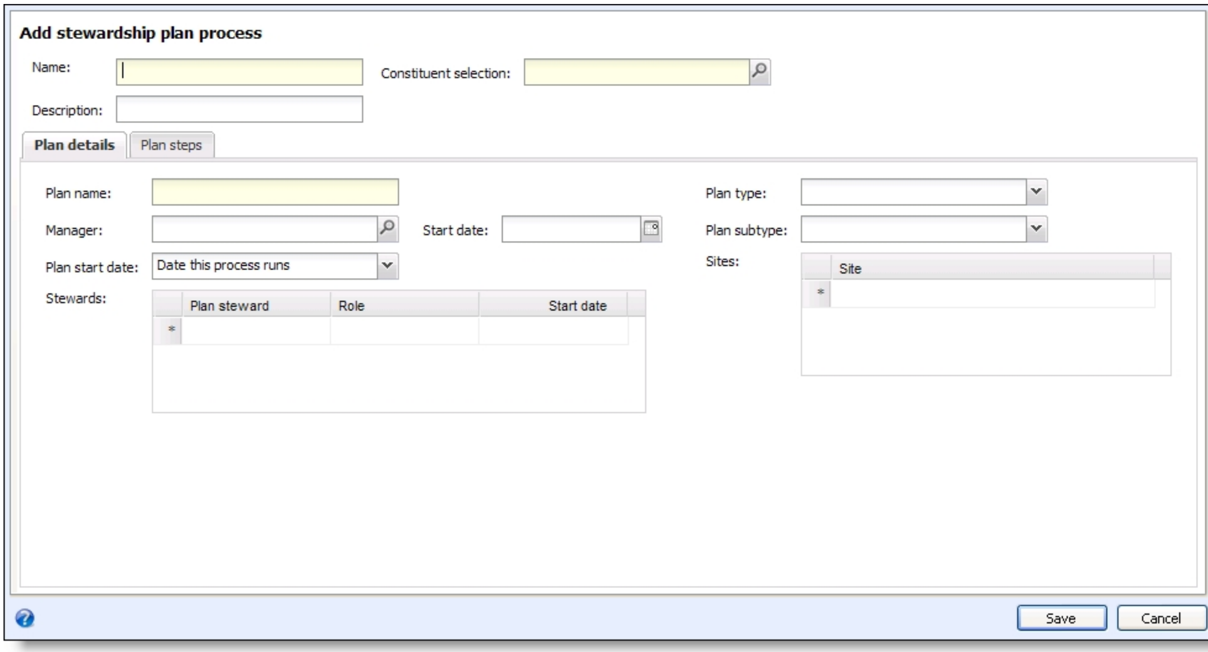
The **Add Plans and Steps Process** function, allows you to create a process that:

- Identifies the constituent selection which contains the records to which you want to bulk assign the plan
- Assigns managers and stewards
- Designates a plan start date
- Restricts the process to a specific site
- Adds steps

From the Add Plans and Steps Process tab of the Manage stewardship plans page, you can complete the following actions:

Add stewardship plan process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Add Plans and Steps Process tab, click **Add**. The Add stewardship plan process screen appears.



3. Enter the necessary information. For detailed explanations of all items included on this screen, see Add a Stewardship Plan Process Screen on page 428.
4. Click **Save**. You return to the Manage stewardship plans page. Your new process displays in the **Add plans and steps process** grid.

Note: This process does not create a plan of the designated name and type if the same name and type is already included on an existing constituent. In this situation, an exception appears on the process report.

5. To run the process, click **Start process**.

Run an existing stewardship plan process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. In the **Add plans and steps process** grid, select the plan process you want to run.
3. Click **Start process**. The Run add stewardship plans process screen appears.
4. From this screen you can change the **Plan name**, **Description**, and **Plan start date**. To make changes to any other definition fields, see Edit a stewardship plan process on page 426.
5. Click **Start**. The process runs and the process page appears.

Edit a stewardship plan process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. In the **Add plans and steps process** grid, select the plan process you want to edit.
3. Click **Edit**. The Edit stewardship plan process screen appears.

4. Make any necessary changes. All items included on this screen are the same as those included on the Add a stewardship plan process screen.
5. Click **Save**. You return to the Manage stewardship plans page.
6. To run the process, select the process in the grid and click **Start process**.

Delete a stewardship plan process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. In the **Add plans and steps process** grid, select the plan process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. You return to the Manage stewardship plans page. The process you just deleted no longer displays in the grid.

Add a Stewardship Plan Process Screen

Field name	Description
Name	Enter the name of the bulk plan process. This displays in the **Name** column of the Add Plans and Steps Process tab.
Description	Enter a description to help you identify the purpose of the process. This displays in the **Description** column of the Add plans and Steps Process tab.
Constituent selection	Select the selection of constituent records to associate with the plan identified in the bulk process. Click the search icon at the end of the field to access a search screen to select the selection of records. Selections are created in *Query*.

Plan Details Tab

Field name	Description
Plan name	Enter the name of the plan you want to assign to the constituents included in your selection.
Manager	Search for and select a constituent to coordinate the efforts of the plan's stewards. Also, enter the start date for the manager.
Plan start date	Select the start date for the plan.

Field name	Description
Stewards	In the **Plan stewards** column, search for and select each constituent associated with the plan. In the **Role** column, select the steward's role for this plan, such as "Primary Steward" or "Secondary Steward." If you have numerous steps, you may need to assign multiple stewards to the plan.
Plan type	Select a plan type to further define the stewardship plan.
Plan subtype	Select a plan subtype to further define the stewardship plan.
Sites	Select sites in your organization to which the process is associated. **Note:** Administrators can set up security access to stewardship plans based on sites. Any security settings your administrators established for the site you specify in the **Site** field take effect for this stewardship plan as soon as you click **Save**.

Add a Stewardship Plan Process Screen

Field name	Description
Name	Enter the name of the bulk plan process. This displays in the **Name** column of the Add Plans and Steps Process tab.
Description	Enter a description to help you identify the purpose of the process. This displays in the **Description** column of the Add plans and Steps Process tab.
Constituent selection	Select the selection of constituent records to associate with the plan identified in the bulk process. Click the search icon at the end of the field to access a search screen to select the selection of records. Selections are created in *Query*.

Plan Details Tab

Field name	Description
Plan name	Enter the name of the plan you want to assign to the constituents included in your selection.
Manager	Search for and select a constituent to coordinate the efforts of the plan's stewards. Also, enter the start date for the manager.
Plan start date	Select the start date for the plan.

Field name	Description
Stewards	In the **Plan stewards** column, search for and select each constituent associated with the plan. In the **Role** column, select the steward's role for this plan, such as "Primary Steward" or "Secondary Steward." If you have numerous steps, you may need to assign multiple stewards to the plan.
Plan type	Select a plan type to further define the stewardship plan.
Plan subtype	Select a plan subtype to further define the stewardship plan.
Sites	Select sites in your organization to which the process is associated. **Note:** Administrators can set up security access to stewardship plans based on sites. Any security settings your administrators established for the site you specify in the **Site** field take effect for this stewardship plan as soon as you click **Save**.

Plan Steps Tab

On this tab you can define steps you want to include in this bulk process.

Field name	Description
Category	Enter a category for the step.
Objective	Enter the purpose for the step.
Target date	Enter the date when the step should occur.
Locked	Select to disable date fields for the step. When you move the dates forward or backward in the **Adjust expected dates** fields, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Start time	Enter the time that the plan step begins.
End time	Enter the time that the plan step ends.
Time zone	Specify a time zone to associate with this step.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step. The program automatically creates a stewardship plan for the contact and adds the step to the contact's plan.
Contact method	Enter how to contact the constituent for this step.
Assigned to	Select a steward to perform the step. If you enter a constituent who is not a steward, the program adds the individual to the stewardship plan's Stewards tab.
Associated plans	Displays the name of the stewardship plan associated with the step or the number of plans if you linked the step to more than one.

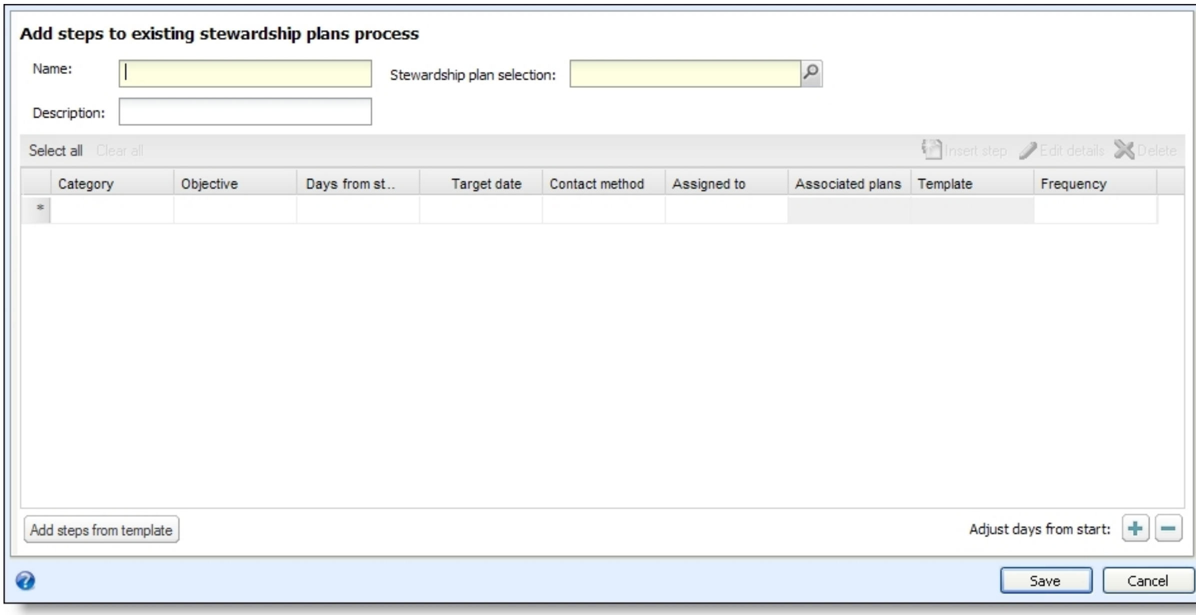
Field name	Description
Template	Enter the name of the template associated with the step. When you add steps from a stewardship plan template, the name of the template automatically appears in this column.
Frequency	Select how often the step occurs.
Step origin	Displays the name of the constituent you originally added the step for in this plan. For example, if you select to view plan steps for subsidiary organizations on a parent organization's stewardship plan, you can easily determine the steps associated with each organization from the **Step origin** column.
Add steps from template	Click to select the template to add to this plan. The template steps appear in the grid. When available, you can filter the grid by sites. If no templates exist, this button is not available. You must manually add steps to the plan.
Adjust target dates	Select the steps that require target date updates. From **Adjust target dates**, select "Forward" or "Backward." Enter the interval of time in days, weeks, or months. To apply your changes, click **Adjust dates**. You cannot adjust locked dates.

Add Steps to Existing Plans Process in Bulk

With **Add Steps to Existing Plans Process**, you can add steps for a selection of stewardship plans. For example, you want every stewardship plan of certain type to have the same step, and you do not want to go through the extra work involved to create steps specific to each individual and plan. Instead, you want to define a step and automatically assign the same step to all stewardship plans included in your selection.

Add steps to existing stewardship plans process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Add Steps to Existing Plans Process tab, click **Add**. The Add steps to existing stewardship plans process screen appears.



3. Enter the necessary information. For detailed explanations of all items included on this screen, see Add Steps to Existing Stewardship Plans Process Screen on page 432.
4. Click **Save**. You return to the Add Steps to Existing Plans Process tab of the Manage stewardship plans page.
5. To run the process, click **Start process**.

Run an add steps to existing stewardship plans process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Add Steps to Existing Plans Process tab, select the process and click **Start process**. The Run add opportunities process screen appears.
3. From this screen you can change basic information such as the opportunity name, type, or expected ask amount. To make changes to any other fields, see Add Steps to Existing Stewardship Plans Process Screen on page 432.
4. Click **Start**. The process runs and the process page appears.

Edit an add steps to existing stewardship plans process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Add Steps to Existing Plans Process tab, select the process and click **Edit**. The Edit add steps to existing stewardship plans process screen appears.
3. Make any necessary changes. All items included on this screen are the same as those included on the Add steps to existing stewardship plans process screen. For information, see Add Steps to Existing Stewardship Plans Process Screen on page 432.

4. Click **Save**. You return to the Add Steps to Existing Plans Process tab of the Manage stewardship plans page.
5. To run the process, select the process and click **Start process**.

Delete an add steps to existing stewardship plans process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Add Steps to Existing Plans Process tab, select the process and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Add Steps to Existing Plans Process tab of the Manage stewardship plans page.

Add Steps to Existing Stewardship Plans Process Screen

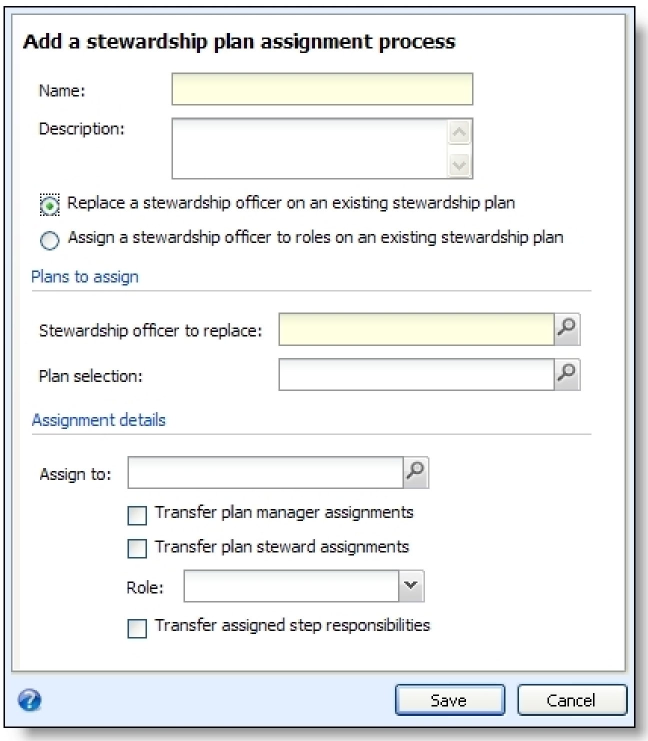
Field name	Description
Category	Enter a category for the step.
Objective	Enter the purpose for the step.
Days from start	Enter the number of days from start of the plan that the step begins.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step. The program automatically creates a stewardship plan for the contact and adds the step to the contact's plan.
Contact method	Enter how to contact the constituent for this step.
Assigned to	Select a steward to perform the step. If you enter a constituent who is not a steward, the program adds the individual to the stewardship plan's Stewards tab.
Associated plans	Displays the name of the stewardship plan associated with the step or the number of plans if you linked the step to more than one.
Template	Enter the name of the template associated with the step. When you add steps from a stewardship plan template, the name of the template automatically appears in this column.
Frequency	Select how often the step occurs.
Add steps from template	Click to select the template to add to this plan. The template steps appear in the grid. When available, you can filter the grid by sites. If no templates exist, this button is not available. You must manually add steps to the plan.

Stewardship Plan Assignments in Bulk

With a **Stewardship plan assignment process**, you can replace a stewardship officer or assign a stewardship officer to roles on an existing stewardship plan.

Add a stewardship plan assignment process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Stewardship plan assignment process tab, click **Add**. The Add a stewardship plan assignment process screen appears.



3. Enter the necessary information. For detailed explanations of all items included on this screen, see Add a Stewardship Plan Assignment Process Screen on page 434.
4. Click **Save**. You return to the Manage stewardship plans page. Your new process displays in the **Stewardship plan assignment process** grid.
5. To run the process, click **Start process**.

Edit a stewardship plan assignment process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Stewardship plan assignment process tab, in the **Stewardship plan assignment process** grid, select the process you want to edit.

3. Click **Edit**. The Edit a stewardship plan assignment process screen appears.
4. Make any necessary changes. All items included on this screen are the same as those included on the Add a stewardship plan assignment process screen.
5. Click **Save**. You return to the Manage stewardship plans page.
6. To run the process, select the process in the grid and click **Start process**.

Delete a stewardship plan assignment process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Stewardship plan assignment process tab, in the **Stewardship plan assignment process** grid, select the process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. You return to the Manage stewardship plans page. The process you just deleted no longer displays in the grid.

Add a Stewardship Plan Assignment Process Screen

Field name	Description
Name	Name of the stewardship plan assignment process. This displays in the **Name** column of the Stewardship plan assignment process tab.
Description	Description to help you identify the purpose of the process. This displays in the **Description** column of the Stewardship plan assignment process tab.
Replace a stewardship officer on an existing stewardship plan	Select this to replace a stewardship officer on and existing stewardship plan with a new constituent.
Assign a stewardship officer to roles on an existing stewardship plan	Select this to assign a stewardship officer to roles on an existing stewardship plan.
Stewardship officer to replace	If you select **Replace a stewardship officer on an existing stewardship plan**, search for and select the stewardship officer to replace.

Field name	Description
Plan selection	Select the stewardship plans you want associated with the bulk process. Click the search icon at the end of the field to access the Selection Search screen. From here, you can search for and select the selection of records to use. Selections are created in *Query*. When you do not select a plan selection, the process updates all plans without a plan manager or those with unassigned steps.
Assign to	If you select **Replace a stewardship officer on an existing stewardship plan**, use this field to select the replacement stewardship officer. If not selected, the constituent you select in **Stewardship officer to replace** will be removed but not replaced with another. If you select **Assign a stewardship officer to roles on an existing stewardship plan**, select the constituent to assign as a stewardship officer.
Transfer plan manager assignments	You can select to transfer plan manager assignments to the new officer.
Transfer plan steward assignments	You can select to transfer plan steward assignments to the new officer. If you select this field, from the **Role** field, select the role to transfer.
Transfer assigned step responsibilities	You can select to transfer assigned step responsibilities to the new officer.

Generate Step Update Batch Process

You can use the Generate step update batch process to create a batch to update multiple plan steps at one time. A regular update batch requires manual entry of each individual transaction you want to change, whereas an update batch created from the Generate step update batch process allows you to populate the Stewardship plan step update batch with multiple steps.

You access the Generate step update batch task from the Manage stewardship plans page.

Add a Generate Step Update Batch Process

To create a Stewardship plan step update batch from the Generate step update batch process, you must first create the business process. You create and manage Generate revenue update batch processes from the Generate Step Update Batch Process tab of the Manage stewardship page. From this page, you can add, edit, mark as active/inactive, and start your Generate step update batch processes.

Depending on your security rights and system role, you can also delete processes from this page.

To access the Generate Step Update Batch tab, select Manage stewardship plans under Prospect management on the Prospects page.

Add a generate step update batch process

1. From the Prospects page, under Prospect management, click **Manage stewardship plans**. The manage stewardship plans page appears.
2. Select the Generate Step Update Process tab.
3. Click **Add**. The Generate step update batch screen appears.
4. In the **Name** field, enter a unique name for the batch.
5. In the **Batch template** field, select the template to use for this batch. Your choices include any templates associated with Stewardship Plan Step Update Batch type.
6. In the **Batch number** field, enter a unique number to identify the batch. Once you save a batch, you can no longer use its number to identify a new batch. If you enter a number that another batch uses, when you click **Save**, a message appears to remind you that the batch number must be unique. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark **Override**.
7. In the **Description** field, enter a unique description to identify the batch. The description appears in the **Uncommitted batches** grid so you can determine the purpose of the batch before you open it.
8. In the **Owner** field, select the user who owns the batch in its initial status.

Tip: The program automatically assigns the person creating the batch as the batch owner. The selected owner owns the batch in its initial status. When you update the status of a batch, you can assign the batch to a new owner.

9. Mark **Enable auto save** if you want the batch to automatically save each row as you work.
10. In the **Step selection** field, enter the selection that contains steps you want to update. You can use the Selection Search to locate an existing selection, or to add a new selection. If the selection is created from an ad-hoc query or a smart query instance, you can click the pencil icon to edit the query used to generate the selection.
11. Under **Updates**, select fields and their values to update.
12. To move target dates, next to **Move target dates**, select "forward" or "backward, the number of units and the units such as "day(s)" or "week(s)."
13. Click **Save** to save the process and return to the Generate Step Update Batch Process tab. The new process appears in the grid.

Run a generate step update batch process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. On the Generate Update Batch Process tab, in the **Generate Step Update Batch Process** grid, click the expand arrow next to the process you want to run.
3. Click **Start process**. The Run generate step update batch process screen appears.

4. From this screen you can override the batch number, and change the step selection, updates, setting to move target dates. To make changes to any other definition fields, see Generate Step Update Batch Screen on page 437.
5. Click **Start**. The process runs and the process page appears.

Edit a generate step update batch process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. From the Generate Step Update Batch Process tab, in the **Generate step update batch process** grid, click the expand arrow next to the plan process you want to edit.
3. Click **Edit**. The Generate step update batch screen appears.
4. Make any necessary changes. For more information about the items on this screen, see Generate Step Update Batch Screen on page 437.
5. Click **Save**. You return to the Manage stewardship plans page.
6. To run the process, select the process in the grid and click **Start process**.

Delete a generate step update batch process

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. From the Generate Step Update batch Process tab, in the **Generate step update batch process grid** grid, click the expand arrow next to the plan process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. You return to the Manage stewardship plans page. The process you just deleted no longer displays in the grid.

Mark generate step update batch process active or inactive

1. From the Prospects page, click **Manage stewardship plans**. The Manage stewardship plans page appears.
2. From the Generate Step Update batch Process tab, in the **Generate step update batch process grid** , click the expand arrow next to the plan process you want to mark active or inactive.
3. Click **Mark inactive** or **Mark active**.

Generate Step Update Batch Screen

The table below explains the items on the Generate step update batch screen.

Screen Item	Description
Name	Enter a unique name for the batch.

Screen Item	Description
Batch template	Select the batch template to use to create the batch. The batch template defines the fields and any default values used in the batch. Typically, a batch processing manager creates the batch template. If the batch template you want does not appear, consult your batch processing manager. For information about how to add a batch template, see the Batch Configuration chapter or the Batch Configuration section of the help file. You can adjust the fields and default settings selected for the batch template. To adjust the fields included in the selected batch template, click Field options. The Customize fields for batch screen appears. After you add the batch to the database, you cannot change its selected batch template.
Batch number	Select whether to use an automatically generated number or a custom number to identify the batch. When you open a batch, the batch number appears in the top corner of the screen. On the Batch Entry page, the batch number appears next to each corresponding batch in the grids. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark Override. For information about batch numbering schemes, see the Batch Configuration chapter or the Batch Configuration section of the help file. If you selected “Manual”, enter a unique number to identify the batch in the field. Once you save a batch, you can no longer use its batch number to identify a new batch. After you add the batch to the database, you cannot automatically generate a new number for the batch.
Description	Enter a description to help identify the batch and explain why you enter the records in the database. You can enter up to 255 characters in this field. The description you enter appears in the Uncommitted batches grid so you can determine the purpose of the batch before you open it.
Owner	Select the user to process the batch in its initial status. The user you select in this field owns the batch in its initial status. When you update the status of the batch to next status in the workflow, you can assign it to a new owner. You can configure system alerts to automatically notify application users by email when they become batch owners. For information about how to configure system alerts for batches, see the *Administration Guide*.
Enable auto save	Mark Enable auto-save if you want the batch to automatically save each row as you work.
Step selection	Click the search icon to access the selection search screen. From here you can search for and select the selection of records you want to include in the process. If after selecting a selection you need to make changes, click the edit icon to open the selection and make an necessary edits.

Screen Item	Description
Updates	Select the **Field to update** from the drop-down in the grid. Available fields are based on output fields included in the selected selection. In the **Changes** column of the grid, enter the new value for the related field.
Move target dates	You can move target dates associated with the steps included in the process backward or forward. You can select to move the dates a selected number of days, weeks, months, or years.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of "Did not finish." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh**.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and and click **Delete**.

Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

> ***Note:*** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

> ***Note:*** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.
2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
    a. For a process that runs once, select the date and time to run it.
    b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
    c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to Create Job Screen on page 441.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

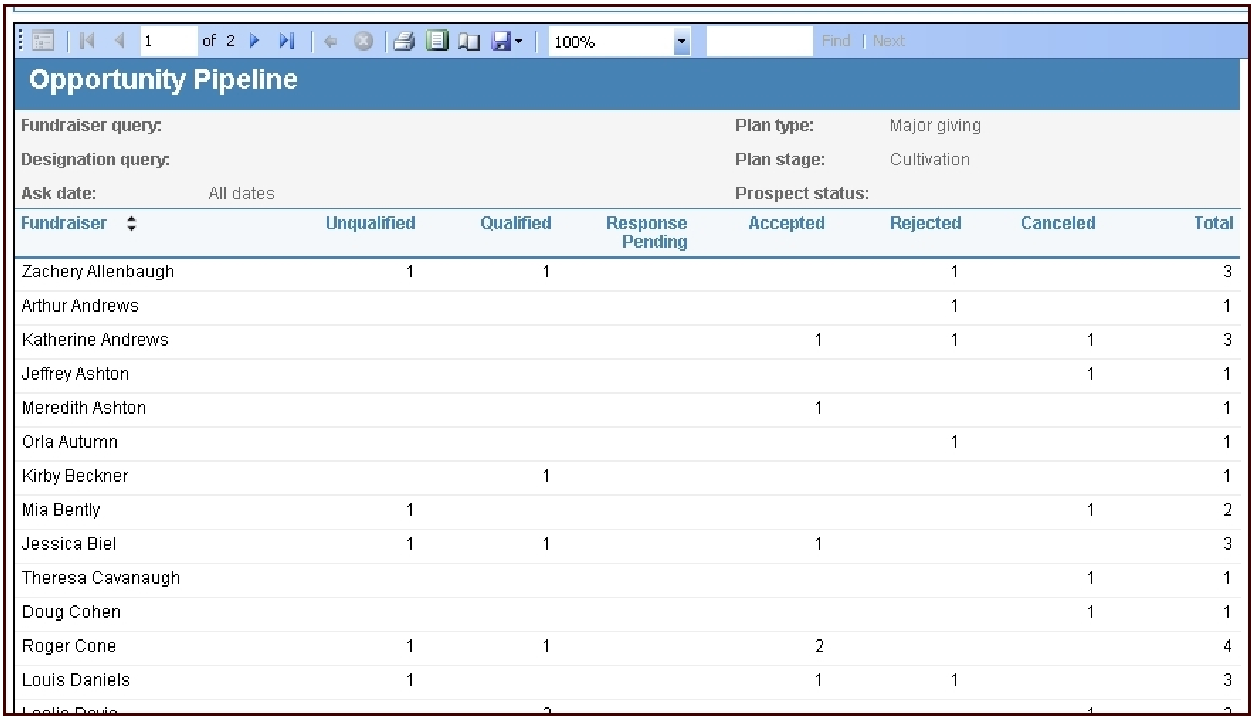
Note: The download process varies according to the browser you use.

Prospect Research Reporting

Major Giving includes several tracking and reporting options, enabling you to quickly and easily generate basic reports tracking a variety of major giving activities. For example, you can generate a **Prospect Plan Analysis** to review details about the various plan types included in your system, including status and ask amount information; you can generate an **Opportunity Pipeline Report** to review details about your fundraisers and ask opportunities; and much more.

Opportunity Pipeline Report

The **Opportunity Pipeline** report helps you track all ask opportunities in your fundraiser pipeline. You can see which opportunities are Accepted, Rejected, Qualified, Unqualified, or Canceled along with the name of the fundraiser responsible for the opportunity. You can filter the report based on a fundraiser or designation query, ask date, plan type, plan stage, and prospect status.



Opportunity Pipeline

Fundraiser query:

Designation query:

Ask date: All dates

Plan type: Major giving

Plan stage: Cultivation

Prospect status:

Fundraiser	Unqualified	Qualified	Response Pending	Accepted	Rejected	Canceled	Total
Zachery Allenbaugh	1	1			1		3
Arthur Andrews					1		1
Katherine Andrews				1	1	1	3
Jeffrey Ashton						1	1
Meredith Ashton				1			1
Orla Autumn					1		1
Kirby Beckner		1					1
Mia Bently	1					1	2
Jessica Biel	1	1		1			3
Theresa Cavanaugh						1	1
Doug Cohen						1	1
Roger Cone	1	1		2			4
Louis Daniels	1			1	1		3

Generate an Opportunity Pipeline Report

1. From the Major Giving page, under **Reports**, select **Opportunity pipeline report**. The Opportunity Pipeline Report screen appears.

Note: You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Opportunity pipeline** from the menu.

2. In the **Fundraiser query** field, click the binoculars. The Search screen appears so you can search for the selection of fundraisers to include in the report. Once you select the selection, you return to the Opportunity Pipeline Report screen. The report will include information about only fundraisers included in the selected selection. To include all fundraiser in your report, leave this field blank.

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

3. In the **Designation query** field, you can select a query of designations on which to base your report. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the designation query. Once located, select the query in the **Results** grid and click **Select**. You return to the Opportunity Pipeline Report screen. The report will include information about only the selected designations. To include information about all designations, leave this field blank.

4. In the **Ask date** field, select the ask date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year”.

If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.

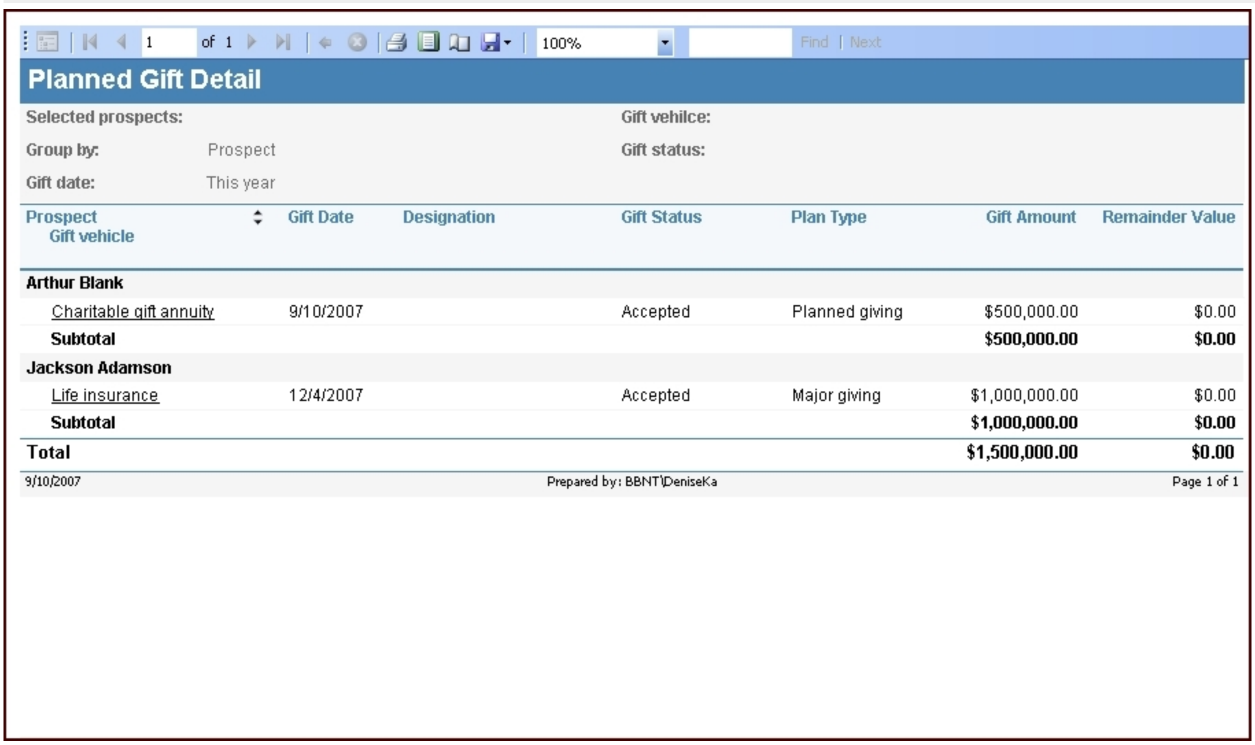
5. In the **Plan stage** field, select the stage on which you want to base your report: Cultivation, Solicitation, Stewardship. Leave the field blank to include all plan stage options.
6. In the **Plan type** field, select the plan on which you want to base your report: Major Giving, Planned Giving, Foundation Giving. Leave the field blank to include all plan type options.
7. In the **Prospect status** field, select the status on which you want to base your report: Assigned, Identified, Qualified. Leave the field blank to include all status options.
8. Select an **Opportunity status**: Unqualified, Qualified, Response Pending, Accepted, Rejected, Canceled. You must select an opportunity status.
9. Click **Refresh** to generate your report.

Note: After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

Planned Gift Detail Report

The **Planned Gift Detail** Report helps you track planned gifts in your system. You can filter the report based on the gift status, gift vehicle, and gift date. You can also select which prospects to include in the report and how you want information grouped.

Note: If a planned gift has additions, the main planned gift is displayed. The gift date is the date of the original planned gift and the amount is the total of the original planned gift plus any additions.



1 of 1 100% Find | Next

Planned Gift Detail

Selected prospects:
Gift vehilce:
Group by: Prospect
Gift status:
Gift date: This year

Prospect / Gift vehicle	Gift Date	Designation	Gift Status	Plan Type	Gift Amount	Remainder Value
Arthur Blank						
Charitable gift annuity	9/10/2007		Accepted	Planned giving	$500,000.00	$0.00
Subtotal					**$500,000.00**	**$0.00**
Jackson Adamson						
Life insurance	12/4/2007		Accepted	Major giving	$1,000,000.00	$0.00
Subtotal					**$1,000,000.00**	**$0.00**
Total					**$1,500,000.00**	**$0.00**

9/10/2007 Prepared by: BBNT\DeniseKa Page 1 of 1

Generate a Plan Gift Detail Report

1. From the Major Giving page, under **Reports**, select **Planned gift detail**. The Planned Gift Detail screen appears.

Note: You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Planned gift detail report** from the menu.

2. In the **Selected planned gifts** field, click the binoculars. A search screen appears, and you can search for the selection you want to include in the report. Once you select the selection, you return to the Planned Gift Detail screen. The report will include information about only planned gifts included in the selected query. To include all planned gifts in your report, leave this field blank.

   For information about creating a selection, see the Query chapter of the *Query and Export Guide*.

3. In the **Gift vehicle** field, select the gift vehicle on which you want to base your report: Life Insurance, Charitable gift annuity, Pooled income fund. Leave the field blank to include all vehicle options.
4. In the **Gift status** field, select the status on which you want to base your report: Proposal, Accepted, Rejected. Leave the field blank to include all status options.
5. In the **Group by** field, select the method by which you want information included in the report grouped: Prospect, Gift vehicle, Gift status. You must select a grouping option.
6. In the **Gift date** field, select the date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year”.

   If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.

7. In the **Include data for associated households**, you can select:

Note: These checkboxes appear only when "Prospect" is selected in **Group by parameter**.

- **Show member data for each household** to base your report on the household
- **Show household data for each member** to base your report on each member of the household

8. Click **Refresh** to generate your report.

Note: After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

Prospect Plan Analysis

The **Prospect Plan Analysis** provides details about selected or all plan types in your system. You can base the report on selected prospects or all prospects and filter on a variety of options: prospect status, opportunity status, plan type, plan stage, and dates. You can even select how you want information grouped.

Note: When an opportunity, such as an unqualified opportunity, does not have an **Ask date**, the report displays the 's **Expected ask date** instead.

Prospect Plan Analysis

Selected prospects:		Plan type:		Group by:	Prospect Manager
Prospect status:		Plan stage:		Date range:	This year
Opportunity status:		Include inactive plans:	No	Date to use:	Ask date

Prospect Manager / Prospect	Plan Type	Opportunity Status	Ask Amount	Response Amount	Difference	Ask Date	Response Date	Days Open
Gretta Yang								
Florian Daniels	Major giving	Canceled	$315,369.12	$0.00	$315,369.12	9/7/2007	9/14/2007	7
Benjiman Davenport	Major giving	Rejected	$136,996.59	$0.00	$136,996.59	8/25/2007	9/1/2007	7
Willa Graack	Major giving	Qualified	$125,906.85	$0.00	$125,906.85	9/12/2007	9/19/2007	7
George Payne	Major giving	Response Pending	$1,122.14	$0.00	$1,122.14	7/29/2007	8/5/2007	7
Sub total			**$579,394.70**	**$0.00**	**$579,394.70**			
Dianne Wilson								
Andrea Avdeenko	Planned giving	Qualified	$12,617.19	$0.00	$12,617.19	8/3/2007	8/10/2007	7
Elizabeth Baker	Major giving	Response Pending	$1,083.16	$0.00	$1,083.16	10/6/2007	10/13/2007	7
George Daly	Major giving	Accepted	$1,039.35	$1,039.35	$0.00	7/29/2007	8/5/2007	7
Gretta Ferber	Major giving	Qualified	$1,544.34	$0.00	$1,544.34	8/31/2007	9/7/2007	7
Anthony Jacobson	Major giving	Unqualified	$16,719.67	$0.00	$16,719.67	9/6/2007	9/13/2007	7
Isabelle Simpson	Major giving	Qualified	$1,086.92	$0.00	$1,086.92	8/2/2007	8/9/2007	7
Clarice Smith	Major giving	Rejected	$6,302.77	$0.00	$6,302.77	8/25/2007	9/1/2007	7
Frederick Taylor	Major giving	Response Pending	$22,797.49	$0.00	$22,797.49	9/23/2007	9/30/2007	7

Generate a Prospect Plan Analysis

1. From the Major Giving page, under **Reports**, select **Prospect Plan Analysis**. The Prospect Plan Analysis screen appears.

   Note: You can also access the report by clicking **Reports** on the navigation bar and selecting **Major Giving reports**, **Prospect Plan Analysis** from the menu.

2. In the **Selected prospects** field, click the binoculars. A search screen appears, and you can search for the prospect selection you want to include in the report. Once you select the selection, you return to the Prospect Plan Analysis screen. The report will include information about only prospects included in the selected query. To include all prospects in your report, leave this field blank.

   For information about creating a selection, see the Query chapter of the *Query and Export Guide*.

3. In the **Prospect status** field, select the status on which you want to base your report: Assigned, Identified, Qualified. Leave the field blank to include all status options.

4. In the **Opportunity status** field, select the status on which you want to base your report: Qualified, Unqualified, Response pending. Leave the field blank to include all status options.

5. In the **Plan type** field, select the plan on which you want to base your report: Major Giving, Planned Giving, Foundation Giving. Leave the field blank to include all plan type options.

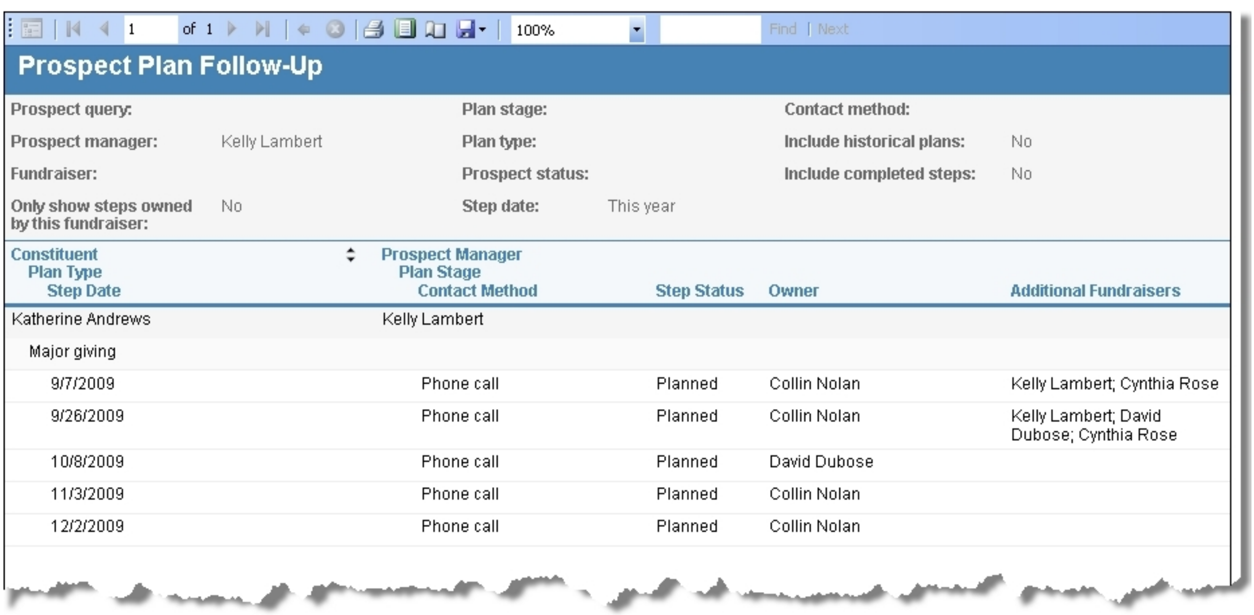
6. In the **Plan stage** field, select the stage on which you want to base your report: Cultivation, Solicitation, Stewardship. Leave the field blank to include all plan stage options.
7. In the **Group by** field, select the method by which you want information included in the report grouped: Primary manager, Secondary manager, Plan stage. You must select a grouping option.
8. In the **Date to use** field, select the plan date on which you want to base your report: Ask date or Response date. You must select a **Date to use** option.
9. In the **Dates** field, select the date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select “This year”.

   If you select “Specific date,” you can select a start date and an end date in the date fields to report on a specific date range.
10. Mark the **Include historical plans** checkbox to include plans designated as “Historical” on the prospect. Do not mark this checkbox if you wish to not include historical plans.
11. Click **Refresh** to generate your report.

Note: After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message “Report processing was canceled” appears. For information about all buttons included in the report, see the *General Features Guide*.

Prospect Plan Follow-Up Report

The **Prospect Plan Follow-up report** helps you track planned, pending, or completed steps for selected prospects. You can view steps for a specific plan stage or type, and limit the results to a certain contact method or fundraiser assigned to the step. With this report, you can easily determine the status of all or selected prospect plan steps.



Generate a Prospect plan follow-up report

1. From the Major Giving page, under **Reports**, select **Prospect plan follow-up**. The Prospect Plan Follow-Up screen appears.
2. In the **Prospect query** field, click the binoculars. A search screen appears, and you can search for the selection of prospects to include in the report. Once you select the selection, you return to the Prospect Plan Follow-Up screen. The report will include information about only prospects included in the selected query. To include all prospects in your report, leave this field blank.

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

3. In the **Prospect status** field, select the status on which you want to base your report. Leave the field blank to include all status options.
4. In the **Prospect manager** field, you can select a prospect manager on which to base your report. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the prospect manager. Once located, select the manager in the **Results** grid and click **Select**. You return to the Prospect Plan Follow-Up screen. The report will include information about only the selected prospect manager. To include information about all prospect managers, leave this field blank.
5. In the **Plan stage** field, select the stage on which you want to base your report. Leave the field blank to include all plan stage options.
6. In the **Plan type** field, select the plan on which you want to base your report. Leave the field blank to include all plan type options.
7. Select **Include historical plans** to include plans designated as "Historical" on the prospect. Do not mark this checkbox if you wish to not include historical plans.
8. In the **Fundraiser** field, you can select to limit the report results to a fundraiser who is either the step owner or who appears as an additional solicitor on the plan step. Click the binoculars to access the Search screen. Enter search criteria and click **Search** to locate the fundraiser. Once located, select the fundraiser in the **Results** grid and click **Select**. You return to the Prospect Plan Follow-Up screen. The report will include information about only the selected fundraiser. To include information about all fundraisers in your report, leave this field blank.
9. Select **Only show steps owned by this fundraiser** to display only plan steps the fundraiser owns. To also include steps on which the fundraiser is an additional solicitor, clear this checkbox.
10. In the **Contact method** field, select the contact method on which you want information included in the report based, such as a meeting, phone call, or mailing. Leave the field blank to include all contact methods.
11. In the **Step date** field, select the step date(s) you want used when filtering information for your report. For example, if you want only information dated during the current year, select "This year."

    If you select "Specific date," you can select a start date and an end date in the date fields to report on a specific date range.

12. Select the **Include completed steps** checkbox to include steps marked as "Completed" in the plan. Clear this checkbox to include only planned and pending steps in the report.
13. Click **Refresh** to generate your report.

Note: After you click **Refresh**, you can stop the program from generating the report by clicking the **Stop Rendering** button on the toolbar. The message "Report processing was canceled" appears. For information about all buttons included in the report, see the *General Features Guide*.

Manage Fundraiser KPIs

Key Performance Indicators (KPIs) enable fundraisers to quickly check their performance. For example, the major giving manager wants his fundraisers to keep an eye on their performances based on the dollar amount of each fundraiser's "Qualified" gift opportunities. The manager makes this request to the KPI administrator, who creates a KPI instance for each fundraiser. Because "Opportunities Amount" is a context-sensitive definition, KPI links are added to each fundraiser's record, allowing him easy access to the KPI data.

Depending on the fundraiser's permissions, a context-sensitive KPI definition adds a **KPI Dashboard** and a **Manage KPI** link to the selected fundraiser's record. The **Manage KPI** link appears on all fundraiser records. For more information about working with KPIs, see the KPI chapter of the *Reports and KPIs Guide*.