

TheRaiser'sEdge[®]

Web Services Installation and Set Up Guide

051409

©2009 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

The Raiser's Edge, MatchFinder, ParaGon, RE:Alum, RE:Event, RE:Member, RE:Queue, RE:Tribute, RE:Volunteer, RE:Zip, RE:Open, and *Blackbaud* are registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE-WebServices-051409

Web Services Installation and Set Up Guide

WEB SERVICES INSTALLATION	1
Install Web Services	2
Update Web Services	4
Run a Web Service	4
Edit Search Option Criteria	4
Track Account Status	5
WealthPoint for The Raiser's Edge	6

Contents

Web Services Installation

Contents

Install Web Services	2
Update Web Services	4
Run a Web Service	4
Edit Search Option Criteria	4
Track Account Status	5
WealthPoint for The Raiser's Edge	6
How WealthPoint Works	6
WealthPoint Data Sources	7
Dun & Bradstreet	7
Lexis-Nexis Property Records	7
SEC Stock Information by Thomson Financial	7
Campaign Contributions by Federal Elections Commission	7
Nonprofit Officer/Director Data by Guidestar	7
MarketGuide	7
Philanthropic Gifts by Waltman's Charitable Gifts	8
Marquis Who's Who	8
Millionaire/Pension Information by Larkspur Data	8
Foundation Assets	8
Data Matching	8
Training for WealthPoint for The Raiser's Edge	9

Procedures

Installing Web Services	2
Changing search criteria options	5
Tracking account status	5

Chapter 1

 Before installing *WealthPoint for The Raiser's Edge*, you must have either a WealthPoint Primary or WealthPoint User role. Call Customer Support if the role was not set up when you purchased the service.

The Raiser's Edge includes support for several **Web Services**: *WealthPoint for The Raiser's Edge*, *PhoneFinder*, *PeopleFinder*, *Data Health Center*, and *Nonprofit Central*.

- With *WealthPoint for The Raiser's Edge*, you can perform an integrated, online wealth profile search using individual records in *The Raiser's Edge*.

In addition, if you have *Prospect Research Management*, Blackbaud's prospective- and major-donor management module, you can easily copy the *WealthPoint* information to your *Raiser's Edge* database. *Prospect Research Management* is standard functionality with *The Raiser's Edge Enterprise* and an optional module available with *The Raiser's Edge*.

When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to “unlock” or activate the optional module. For more information about unlocking an optional module, see the *Program Basics Guide*; for more information about *Prospect Research Management*, see the *Prospect Research Management Guide*. You can access both guides through *The Raiser's Edge* help file.

- *PeopleFinder* provides address updates and address histories for selected *Raiser's Edge* constituents.
- *PhoneFinder* provides updated phone information for selected *Raiser's Edge* constituents.
- The *Data Health Center* houses update services, such as **AddressAccelerator**, **AddressFinder**, and **PeopleFinder**. It also includes a free data checkup service. At no charge, you can submit an export file to Blackbaud for analysis. Once Blackbaud finishes its analysis, we give you an overview of your data's general health and recommend actions you should take to update your data.
- You can now use the *Nonprofit Central* web service to view and print information about the organization from the *Nonprofit Central* database from within *The Raiser's Edge*. The *Nonprofit Central* database is available to community foundations who purchase an annual subscription. For more information about this service, contact your affiliated Community Foundation.

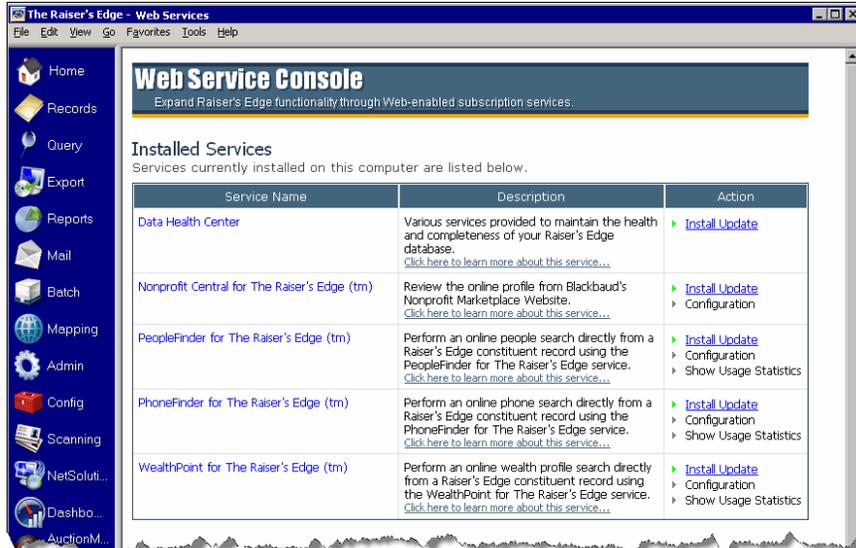
Install Web Services

To use the **Web Services**, you must subscribe to the service and enter the **User Name** and **Password** provided you by Blackbaud.

➤ Installing Web Services

1. Open *The Raiser's Edge*.
2. On the Raiser's Edge bar, click **Web Services**. The Web Services screen appears.

- Under **Available Services**, in the **Service Name** column, click the link to the Web service you want to install. The installation process begins. After the selected Web service installs, the service name appears under **Installed Services**.



- Before you can use the service, you must enter the **Username** and **Password** provided you by Blackbaud. To enter this information, on the Web services Console screen, in the **Action** column of the corresponding Web service, click the **Configuration** link. The Configuration Options screen appears.

The screenshot shows the 'WealthPoint for The Raiser's Edge - Options' dialog box. The title bar reads 'WealthPoint for The Raiser's Edge - Options'. The main content area is titled 'Configuration Options' and includes the following sections:

- Connectivity**: A button labeled 'Test Connection to WealthPoint Server'.
- Login Information**: Two input fields labeled 'Username:' and 'Password:'.
- Search Options**: A checked checkbox labeled 'Use strict search method' with a note below it: 'Using the strict search method will limit your results to those which most closely match the constituent information, possibly omitting desired close matches.'

At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

- Enter the **Username** and **Password** provided you by Blackbaud.
- Click **OK** to save your information.

Update Web Services

Updating the various Web services is easy. Before running a service, visit the Web Services Console screen by clicking the **Web Services** link on the Raiser's Edge bar. Look in the **Action** column of the corresponding Web service. If the **Install Update** link is enabled, an update exists for that Web service; if the **Install Update** link is disabled, no update exists.

Run a Web Service

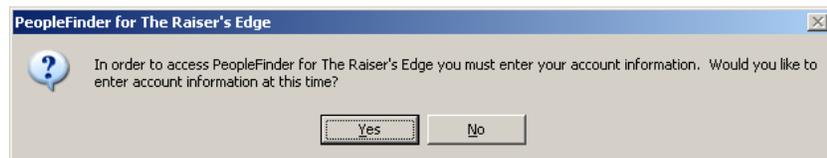
All Web services except *Data Health Center* are accessed from the constituent record. *Data Health Center* services are accessed from the **Data Health Center** link on the Raiser's Edge bar. For more information about using this product, see the *Data Health Center User Guide* or click F1 from any screen in the health center to open the help file.

➤ Running a Web service

1. Open the constituent record for which you want to run the Web service.
2. From the action bar, click the **Run Web Service** button.



3. If you already entered your login information, the selected Web service opens; if you have not entered your login information, a screen similar to the one below appears.



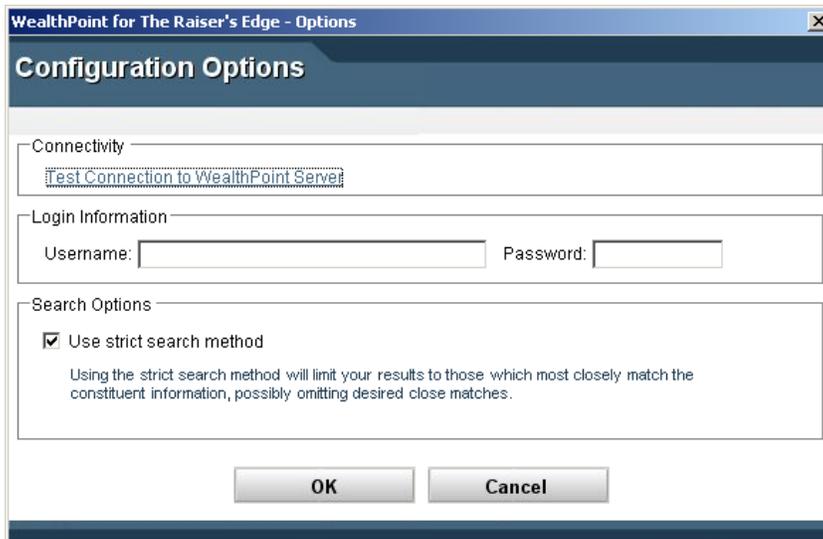
4. Click **Yes** to open the login screen. After you enter your login information, click **OK**. The selected Web service opens.

Edit Search Option Criteria

You can change the search criteria options at any time, using the **Configuration** link on the Web Services Console screen.

➤ Changing search criteria options

1. From the Web Services Console screen, in the **Action** column of the corresponding Web service, click the **Configuration** link. The Configuration Options screen appears.



The screenshot shows a dialog box titled "WealthPoint for The Raiser's Edge - Options" with a close button (X) in the top right corner. The main title is "Configuration Options".

- Connectivity:** A section with a button labeled "Test Connection to WealthPoint Server".
- Login Information:** A section with two text input fields: "Username:" and "Password:".
- Search Options:** A section containing a checked checkbox labeled "Use strict search method". Below the checkbox is a note: "Using the strict search method will limit your results to those which most closely match the constituent information, possibly omitting desired close matches."

At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. In the **Search Options** frame, mark **Use strict search method** if you want to limit your results to only those closely matching information entered in the constituent record. To use a less strict criteria, do not mark this column.
3. Click **OK** to save your changes and close the Configuration Options screen.

Track Account Status

The **Show Usage Statistics** link accessed from the Web Services Console screen, allows you to keep track of the number of searches remaining in your Web services accounts.

➤ Tracking account status

1. From the Web Services Console screen, in the **Action** column of the corresponding Web service, click the **Show Usage Statistics** link. If you are logged into your Web service, the Account Usage screen appears, displaying account information.

If you are not logged into the Web service, a screen appears allowing you to enter your login information. After you enter your information and click **OK**, the Account Usage screen appears.



2. Click **OK** to close the screen.

WealthPoint for The Raiser's Edge

This section provides general information about working in *WealthPoint for The Raiser's Edge*.

How WealthPoint Works

The *WealthPoint* analysis begins when you send Blackbaud a copy of your database, including individual giving histories. The information you provide is cross-referenced against the *WealthPoint* database. *WealthPoint* first identifies the wealthiest constituents in your database and then adds a broad array of data about those individuals.

- Biographical information
- Employment data
- Income and assets
- Real estate
- Financial holdings
- Charitable gifts
- Philanthropic interests
- Associations

 For a list of useful prospecting resources, visit our Web site: <http://www.wealthpoint.com/resources.html>.

WealthPoint Data Sources

The information gathered by *WealthPoint* is based on the following data sources.

Dun & Bradstreet

Understanding a prospect's professional life is a crucial part of identifying the major gift prospects in your file. *WealthPoint* leverages three files from **Dun & Bradstreet** to provide you with data about the prospect'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.

Lexis-Nexis Property Records

This is the largest property database in the United States, containing over 150 million property records, representing more than 94% of all U.S. properties. The full real estate record is provided, which includes title of property, sale date, market price, and sale price. Multiple properties are included, as well as properties held in trust.

SEC Stock Information by Thomson Financial

This file includes current insiders who have traded since 1991. The Current Insider File from Thomson Financial provides stockholding information on public company officers, directors, and major shareholders. You are provided with the latest holdings, stock type, and type of ownership.

Campaign Contributions by Federal Elections Commission

The Federal Elections Commission database contains detailed information about 2,000,000 federal election contributions. This information includes the amount of the contribution and the recipient of the contribution.

Nonprofit Officer/Director Data by Guidestar

Data extracted from Guidestar.com contains the names of 220,000 nonprofit board members and executives from 275,000 organizations. Information includes the nonprofit organization, as well as the affiliation and address of the donor.

MarketGuide

MarketGuide contains 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.

Philanthropic Gifts

Because philanthropic gift information is vitally important to nonprofit organizations, Blackbaud uses DonorBank. This data service contains information on charitable donations to thousands of nonprofit organizations covering all 50 states. Donor name, type of gift, contribution date, and gift size are included in these detailed reports. DonorBank includes triple the number of current gifts that can be found in any similar data source and is available exclusively via Blackbaud Analytics.

Marquis Who's Who

This source includes detailed biographical information on over 1,000,000 individuals. Your file is matched 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*.

Millionaire/Pension Information by Larkspur Data

A number of indicators can suggest the presence of wealth in a household. For example, the presence of luxury items like luxury automobiles, yachts, and private planes, or a high-balance personal retirement (Keogh) plan indicate wealth. Larkspur compiles this type of information from over 70 different data sources, and isolates 3.4 million high net-worth individuals nationwide.

Foundation Assets

Private foundation data is extracted from Guidestar.com. Information includes the foundation name and address and total assets (fair market value) along with the prospect's title and compensation.

Data Matching

To ensure the accuracy of the information we send you, Blackbaud returns only records where an exact match exists. We use several "possible exact match" combinations.

- A1 First Name, Last Name, Home Address, Zip Code
- A1S Spouse First Name, Spouse Last Name, Spouse Home Address, Spouse Zip Code
- A2 Last Name, Home Address, Zip Code
- A2S Spouse Last Name, Spouse Home Address, Spouse Zip Code
- A3 First Name, Last Name, exact Birth Date
- A3S Spouse First Name, Spouse Last Name, Spouse exact Birth Date
- A4 First Name, Last Name, Company Name, Company Address
- A4S Spouse First Name, Spouse Last Name, Spouse Company Name, Spouse Company Address
- A5, Full Name, Phone Number
- A5S, Spouse Full Name, Spouse Phone Number
- B1 Full Name, Zip Code

- B1S Spouse Full Name, Spouse Zip Code
- B2 Full Name, Zip Proximity
- B2S Spouse Full Name, Spouse Zip Proximity
- N1 First Name, Last Name
- N1S Spouse First Name, Spouse Last Name
- Z1 First name, Last Name, first three digits of home ZIP Code
- Z1S Spouse First name, Spouse Last Name, Spouse first three digits of home ZIP Code
- Z4 First name, Last Name, first three digits of company (business) ZIP Code
- Z4S Spouse First name, Spouse Last Name, Spouse first three digits of company (business) ZIP Code

Training for WealthPoint for The Raiser's Edge

After you purchase *WealthPoint for The Raiser's Edge*, Web-based training is available online until the end of the month following your purchase. Anyone in your organization can use the training. During this time, you can access it as often as necessary to refresh your understanding of data, match codes, and features. To access the training, go to www.blackbaud.com/files/training/wbt/wpre/index.aspx.

