

# Prospect Research Search

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# One-Stop Prospect Search and Add



The Search in **ResearchPoint** enables you to quickly open an existing prospect record or search for new prospects from the same page. This one-stop prospect search from one location not only saves you time but can help prevent duplicates.

We recommend you search your saved prospects first. Then, if the prospect is not found, you can also access the Target Analytics prospecting database and search for new prospects. If you find a new prospect in the search results, you can add and screen the record from the Search page.

**Tip:** If you integrate with **The Raiser's Edge**, you also have the option to search all saved prospects. This search will look for your prospect in both **ResearchPoint** and **The Raiser's Edge** at the same time.

The Target Analytics prospecting database is available for all subscription levels. Based on your subscription level, your search options and data access may vary. For information about how the subscription levels affect the Target Analytics prospecting database, review the subscription chart.

**Prospecting Database** ✕

With Starter you get...	With Essentials you get...	With Professional you get...
<ul style="list-style-type: none"> <li>✓ 500 individual WealthPoint screens</li> <li>✓ Prospect database search with:               <ul style="list-style-type: none"> <li>▪ Prospect name, DOB, marital status and occupation</li> <li>▪ Additional household members</li> <li>▪ Known addresses</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Unlimited individual WealthPoint screens</li> <li>✓ 2,500 group WealthPoint screens</li> <li>✓ NOZA advanced matching</li> <li>✓ Prospect database search with:               <ul style="list-style-type: none"> <li>▪ Prospect name, DOB, marital status and occupation</li> <li>▪ Additional household members</li> <li>▪ Known addresses</li> <li>▪ Confirmed wealth</li> <li>▪ Confirmed real estate</li> <li>▪ Confirmed businesses</li> <li>▪ Confirmed securities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Unlimited individual WealthPoint screens</li> <li>✓ 7,500 group WealthPoint screens</li> <li>✓ NOZA advanced matching</li> <li>✓ Prospect research requests</li> <li>✓ Prospect database search with:               <ul style="list-style-type: none"> <li>▪ Prospect name, DOB, marital status and occupation</li> <li>▪ Additional household members</li> <li>▪ Known addresses</li> <li>▪ Confirmed wealth</li> <li>▪ Confirmed real estate</li> <li>▪ Confirmed businesses</li> <li>▪ Confirmed securities</li> <li>▪ Confirmed NOZA giving</li> <li>▪ Household Mosaic</li> <li>▪ Household income estimate</li> <li>▪ Discretionary spending estimate</li> </ul> </li> </ul>

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Close

Did you search your saved prospects and the external prospecting database but didn't find your constituent? From the Search page, you can also manually add a new prospect record and screen.

**Show Me:** Want to learn about the Target Analytics Prospecting Database? Watch [One-Stop Prospect Search and Add](#) [6:32] and [Deep Dive into the Target Analytics Search](#) [9:09] to become a pro at finding and adding your prospects.

## ➤ How to Search for Prospects

1. From the Home page, select which database you want to search.
  - **Search saved prospects** - Searches for prospects already added to **ResearchPoint**.
  - **Search all saved prospects** - If you integrate with **The Raiser's Edge**, this option enables you to search for existing records in both **ResearchPoint** and **The Raiser's Edge**.
  - **The Raiser's Edge only** - If you integrate with **The Raiser's Edge**, this option enables you to open or add a constituent record in **ResearchPoint**.

**Tip:** If a constituent record was previously added and linked from *The Raiser's Edge* to *ResearchPoint*, a "View RP" link appears for the search result. If the constituent record is not in *ResearchPoint* yet, an "Add to RP" link appears for the search result. All *Raiser's Edge* records in the search results grid will have a large RE icon in the search result row.

- **ResearchPoint only** - If you integrate with *The Raiser's Edge*, this option enables you to search for prospects already added to *ResearchPoint* but does not search for existing constituent records in *The Raiser's Edge*.
  - **Find new prospects** - Searches for new prospects in the Target Analytics prospecting database.
2. In the **Name or ID...** field, enter the prospect's ID or name. You do not have to provide the full name. For example, you can enter "smi" for Smith. However, wildcard characters such as "\*" can only be used in the advanced search.

**Tip:** To improve the search speeds when you search for new prospects in the Target Analytics prospecting database, include both the name and location.

3. In the **Location** field, enter any location information you have for the prospect: city, state, zip code.
4. To access additional search criteria, click **Show advanced search**.
5. Click **Search**. The search results grid displays any records that satisfy your search criteria.

# Advanced Search

The fields available for an advanced search are based on the type of search you run.

If a field is grayed out or does not appear, it means that field is not part of the search type you've selected. By default, results can return that are similar to what you entered. For example, if you enter "Sam," we also will return results for "Samuel," "Samantha," and all other variations. To search based exactly on how you entered the information on the Advanced search screen, select **Exact match only**.

## ➤ Search Parameters

When you search for saved prospect records, you can set criteria for how the application searches. You can limit the search by record type, limit the number of results that return, and whether to include inactive or deceased records. For example, if you want to search for a household, it helps to limit by record type so you do not have to sort through individual and household results.

## ➤ Biographical Search Fields

The biographical criteria are especially helpful when you know the prospect you are looking for, whether it's in your database or when you search the Target Analytics external prospecting database. For new prospects, the more information you provide, the easier it is to find your prospect with confidence.

Field Name	Description
<b>Last name, First name, Middle name, Nickname, Spouse last name, Spouse first name, HH member last name, and HH member first name</b>	We recommend you start with as much name information as you know to help you find your prospect. If no results return, then we recommend you remove information.  When you search for new prospects, we do not search by spouse since Experian can return additional household members. Instead, the name you enter here will be matched to all household members on the Experian record. When you add and screen the individual, you can choose which household member is the spouse.
Address information	Enter as much of the address as you know. However, a more broad search by ZIP or state may help you find a prospect when an exact address in a large metropolitan area is not known.
<b>Business name</b>	Do you know the business name but not the prospects associated with the business? You can enter a business name and leave the prospect name fields blank. The search results will include all prospects with a business ownership association to the name you entered.
<b>Business identified?</b>	Select if you want to include prospects linked to a Dun & Bradstreet record.
<b>Age range</b>	We have you search by age range instead of date of birth to provide the best possible results. Date of birth is more important when you perform a WealthPoint screen later.


Field Name	Description
<b>Class of</b>	Enter a class of year on which to base your search. This field is helpful if you want to cast a wider net of prospects in ResearchPoint from a specific class year and a minimum amount of estimated wealth.

## ➤ Wealth & Giving Search Fields

Wealth and giving criteria in the Advanced search screen can especially help you find a group of prospects. While it's not often that you search for someone not known to your organization previously, we do provide this capability so you can search for new prospects who meet your wealth and giving criteria. Name information is not required on the Advanced search screen. However, most wealth and giving criteria are only available when you search for new prospects.

Field Name	Description
<b>Overall rating</b>	When you search for prospect records in <b>ResearchPoint</b> , you can select an overall rating on which to base your search.
<b>Min. estimated wealth</b>	When you search for prospect records in <b>ResearchPoint</b> , select an estimated wealth rating on which to base your search. For example, you can search all prospects in your database that include a primary address in Charleston, SC with an estimated wealth of more than \$1 million.
<b>Min. confirmed wealth and Max. confirmed wealth</b>	Select an amount to filter the search results. Confirmed wealth is data that has a confidence rating of 5.
<b>Total giving, Largest gift, and Giving categories</b>	If you enter giving criteria, the Target Analytics prospecting databases searches NOZA data for prospects who meet your requirements.
<b>Real estate value</b>	Select a real estate value range. The Target Analytics prospecting database searches CoreLogic data for prospects who meet your requirements.
<b>Securities value</b>	Select a securities value range. The Target Analytics prospecting database searches Thomson Reuters data for prospects who meet your requirements.
<b>Household income est. and Discretionary spending est.</b>	Select an income and discretionary spending estimate range. The Target Analytics prospecting database searches Experian data for prospects who meet your requirements.
<b>Household Mosaic</b>	Select the household mosaic on which you want to base the search. For example, you can search for all A02-Power Elite prospects in Charleston, SC by completing the <b>City, State</b> , and selecting the <b>A02-Power Elite</b> option on the Household Mosaic screen. <a href="#">Household Mosaic rankings</a> are provided by Experian.

# Prospecting Database Search Results Grid

When you search for new prospects, each search result in the grid 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**.

**Search**

Find new prospects

Show advanced search

Prospect not found? [Add a new prospect and screen now](#)

1 result(s) displayed for "Arthur Blank" in "Atlanta, GA"

**Prospecting Database results** Sort by: Full name

**ARTHUR M BLANK (Age 71)**   **Add and wealth screen a prospect!**

Confirmed Wealth	Biographical	HH Members
Confirmed wealth: \$3,164,422,516	DOB: 1/1943	STEPHANIE V BLANK
Real estate: \$30,996,481	Marital status unknown	DOB: 1971 (Age 43)
Businesses: \$0	Occupation unknown	Marital status unknown
Securities: \$3,133,426,035		Occupation unknown


Addresses (1 of 3)	Giving	Real Estate (1 of 5)
1080 W PACES FERRY RD NW ATLANTA, GA 30327	Largest gift: \$1,000,000 EDUCATION \$4,325,000 HOSPITAL, HEALTH CENTER \$2,401,000 INTERNATIONAL, FOREIGN AFFAIRS, \$2,200,000	1080 W PACES FERRY RD NW ATLANTA, GA 30327 Value: \$13,698,600 Owner: BLANK ARTHUR M

Businesses (1 of 5)	Securities (1 of 3)	Demographic Models
Arthur M Blank Foundation PRESIDENT Company valuation: \$6,353,284 Ownership value: \$0	HOME DEPOT INC Chairman of the Board Total value: \$3,376,291,941 Direct value: \$3,197,570,192 Indirect value: \$178,721,749	Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262

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 Search Results

After running a prospect search, click the export icon located at the top of the results grid . Your search results download as a .CSV file.



# Add New Prospect from Search Results

After you run a Target Analytics search and locate an interesting prospect, you can add the new prospect to **ResearchPoint**.

**Warning:** When importing new prospect information that includes Experian data, we add suffixes to **ResearchPoint** records only if the suffix already exists in the **ResearchPoint** database, so make sure all suffix code table values are in place in your code tables before you save the record to **ResearchPoint**, or you can choose an appropriate code table value from your existing options when you confirm the Experian record. If you have rights to add code table values, you can also add values to satisfy any Experian needs.

1. From the **Prospecting Database results** grid, in the row of the prospect you want to add, click **Screen now**. The Add new individual screen appears.
2. If a spouse or business are associated with the prospect in the search results, you can add them easily to the new record by selecting the spouse and/or business name from the drop down menu in the **Select spouse's name** and **Select a primary business** fields. Because Experian can return up to five additional household members, the first person listed may not be the spouse. If this information is not included in the search results, but you know the spouse or primary business, click **or enter manually**. You can then either search your system for the relation or open the add screen and add the relation to your system.
3. To run a WealthPoint screening on this record when you save, select **Screen record on save**.
4. Click the **Set Relationships** tab to view reciprocating relationships entered for the prospect. You can edit these entries if necessary.
5. Click **Save**. The new prospect's wealth and ratings record appears. If you chose to perform a WealthPoint screening, an alert will appear when the screening is complete.

## Add a New Prospect and Screen

If the search for new prospects did not find your person, you can still add them and perform a WealthPoint screening.

### > Individual Tab

Enter as much name and contact information as you know about the prospect. Enter the name of the individual exactly as it should appear throughout your database, such as on pages and reports. Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed.

### > Household Tab


If known, enter the household and relationship information for the prospect. To quickly find a constituent in the **Related individual** field, enter the name of the constituent and press **TAB**. If the

program matches the name to a constituent in the database, the constituent's name appears in the field. If the program matches the name to multiple constituents, the Individual Search screen appears and displays the matched records in the **Results** grid. Select the correct constituent or start a new search. If the individual is not already a constituent in the database, you can add the constituent from the search screen.

### > Business Tab

If known, enter the business and employment information for the prospect. To quickly find an organization in the **Related organization** field, enter the name of the business and press **TAB**. If the program matches the name to an organization in the database, the organization's name appears in the field. If the program matches the name to multiple organizations, the Organization Search screen appears and displays the matched records in the **Results** grid. Select the correct organization or start a new search. If the organization is not already a constituent in the database, you can add the constituent from the search screen.

# 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.

## 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 constituent 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.

## 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

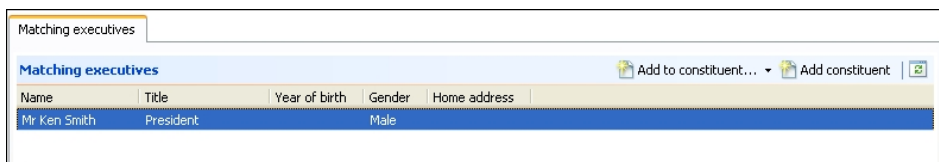
The **Business ownership summary** section displays at the top of the page and includes general information about the business, such as:

Business ownership summary			
Company:	Instron	DUNS:	1007855
Trade name:	Instron Satec	SIC code:	3829
Description:	Meas Ctng Dvcs N	Year started:	2005
Phone:	(781) 828-2500	# of employees:	1329
Company address:	825 University Ave Norwood, MA 02062	Held:	Public
Mailing address:		Sales:	\$116,800,000.00
		Ratio:	0.00
		Valuation:	\$0.00

- 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

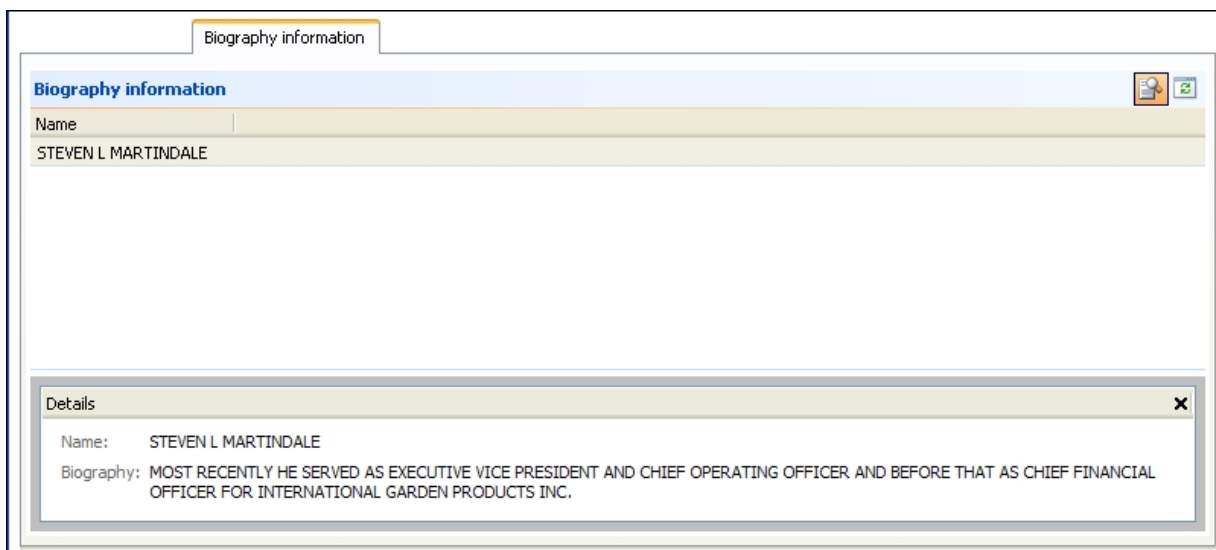
### > Matching Executives Tab

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.



## ResearchPoint 4.91 Prospect Research Search US

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