

Getting Started with ResearchPoint™

An Introduction to your Prospect Research Solution

Welcome to ResearchPoint, your new tool to manage prospect research data. In combination with **Altru**, **ResearchPoint** can be a powerful asset as you research, understand, and connect with donors. Our software helps you make decisions in prospect development based on data and analytics. From any Internet browser, you can log in, research, and send reports to development officers and key organization leaders.

Overview

WealthPoint Screening

Your research in **ResearchPoint** is powered by *WealthPoint*. With an array of comprehensive data sources — CoreLogic, Dun & Bradstreet, Experian, Federal Election Commission, Guidestar, Larkspur Data, MarketGuide, Marquis Who's Who, NOZA, and Thomson Financial Corporate Insider Database — *WealthPoint* enables you to complete your wealth research. During a wealth screening, Target Analytics searches all these sources of public data for your constituent.

More is More! — When you provide as much criteria as you know, like name, address, spouse, and date of birth, you'll have improved data results return with higher confidence ratings on a wealth screening. You can then analyze total publicly identifiable wealth, real estate, business, and philanthropic giving as you determine a prospect's capacity and inclination for a major gift to your organization.

Where to Get Started?

As you begin, review the basic product information and become familiar with the different resources available. No matter the situation — troubleshooting, new to prospect research, best practices, and more — we are here to help you get the most out of **ResearchPoint**.

Learn with ResearchPoint Training

All ResearchPoint users are able to take two introductory ResearchPoint training classes at no cost — **ResearchPoint: Introductory Essentials** and **ResearchPoint: Introduction to WealthPoint**. After you take the introductory classes, we offer 7 regular classes in three levels — Introductory, Intermediate, and Advanced.



To sign up, see the [ResearchPoint Learn class schedule](#).

You can also watch a video on how to use [Training Central](#).

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System Requirements

- For optimum performance, use the latest version of your preferred Internet browser.
- Set screen resolution display to 1024 x 768 or higher.
- Connect to the application web server via HTTPS.
- Use a workstation with a minimum of 2GB memory (RAM).

For full Blackbaud hosting recommendations, refer to [System Requirements](#).

Subscription Levels

Features	Starter*	Essentials*	Professional*
Group (Batch) Screens		2,500	7,500
Individual Wealth Screens	500	Unlimited	Unlimited
Custom Research Lists	•	•	•
Extended Network Features	•	•	•
Advanced Giving Matching		•	•
Prospect Research Requests			•
Advanced Search Capabilities			•

*For the latest subscription plans and pricing information, see [ResearchPoint pricing](#).

Add ResearchPoint Roles to Altru Users

As you begin to use **ResearchPoint**, it's important to review program roles and create user names for each individual in your organization who needs to complete research or view research results. When you add users, we recommend you create a unique user name for each individual instead of sharing login information.

Benefits of Adding Unique Users

- For database security, it's easier to disable a single user than make adjustments when an individual separates from your organization.
- From **Prospects**, under **Configuration**, click **Wealth and ratings data** to track who performed WealthPoint screens.
- When you create queries to track and report on prospect data research, include the **Added by user name** and **Changed by user name** fields to verify who worked on a specific record.
- On the Biographical Information tab of a prospect's wealth and ratings record, you can track and report on the history of changes to a prospect's record.
- You can assign users to a research list, prospect research request, batches, and more!

How to Add Users

1. As your organization's **ResearchPoint** administrator or assigned Prospect Research Manager, log in to **ResearchPoint**.
2. From **Administration**, under **Configuration**, click **Organizational Units**. The Domain Users page appears.
3. Click **Add**. Enter the user name, description, and password for each user. The system automatically appends your Blackbaud site ID to the end of the user names you create. For description, we recommend you enter the role type you plan to assign to the user.
4. Click **Save**. You return to the Domain Users page. Before you add another user, we recommend you first assign security permissions to the user you created.
5. To open the user's **ResearchPoint** profile, click the name.
6. On the System Roles tab, click **Add** and select a system role.
7. To enable email alert settings, click **Edit** on the Email Preferences tab, to enter the email address.

Questions about Subscriptions?

Want to upgrade your subscription or have questions about your package? Contact your Blackbaud account representative, or email solutions@blackbaud.com.

Tip: If you manage many users, we recommend you add the Domain Users page link to your shortcuts.

Tip: On the Domain Users page, if you click the double arrows next to a user's name, you can use the **Reset password** to change a user's password for them.

8. To add another new user, return to the Domain Users page.
After you add a user, you can access the profile from two places — the Domain Users page, or from **Administration, Security**, click **Application Users**.

Important! From **Application Users**, you can access key tasks for your ResearchPoint users. Next to the login name, click the double arrows to access the action bar. On the action bar, you can edit the application user's link to a constituent record and enter an email address. If you save an email address, you can send a link to users so they can reset their own passwords.

ResearchPoint User Roles

Prospect Research Manager – Assign this administrator role to individuals who need the greatest level of access to functionality. This role builds on the prospect researcher role. To assign someone prospect research manager rights, you should also give them the prospect researcher role. Prospect research managers can add new users to the system and control user access.

Prospect Researcher – This is the main role in **ResearchPoint**. Assign prospect researcher to individuals who perform prospect research tasks. For example, the most important task of a prospect researcher is to confirm and reject results from a WealthPoint screen. If you have an individual who performs part-time research, such as a development officer, assign them this role.

Development Officer (View Only) – As a view-only role, assign these rights to development officers who need to view ResearchPoint data. View-only enables development officers to search and review prospects and print prospect research reports. However, these users cannot add, edit, or delete content.

Development Officer (Advanced Rights) – Used with the development officer, you assign both these roles to users who need more than view-only rights, but not as much as a prospect researcher. Advanced Rights enables development officers to screen records and access a limited amount of add and edit rights, in addition to the view-only rights.

Connect with ResearchPoint Peers

You're Invited to the [Target Analytics Online Community](#). Join today to ask questions, get answers, talk to peers, submit product ideas, and get the best advice from experts!

Have a question? Want to share a great idea?
Be a part of the conversation.

[Join the community >](#)



Target Analytics®

> To learn more about ResearchPoint How-to Documentation, visit: www.blackbaud.com/howto/ResearchPoint.