

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 your constituent relationship management software, **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, 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.

Integration with the Raiser's Edge

If you use **The Raiser's Edge**, you can identify, research, and cultivate constituents whose philanthropic giving and previous engagement makes them major giving prospects. With **ResearchPoint**, we guide you in how to take a large pool of donors, narrow your focus, assign major giving ratings, and develop research reports for development officers. **ResearchPoint** enables you to use data and research to better understand your donors and develop meaningful relationships.

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.
- To integrate with **The Raiser's Edge**, use **The Raiser's Edge 7.92.5508 Patch 5** or higher.
- 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](#).

How to Log in to ResearchPoint

Your administrator contact should receive an email from Blackbaud with an invitation to join your new **ResearchPoint** hosted database.

URL – Log into your hosted **ResearchPoint** database from the latest version of your preferred Internet browser. Replace ##### with your organization's site ID.

Example:

<https://login.blackbaudondemand.com?SiteID=#####>

or

<https://login.blackbaudondemand.com?SiteID=#####RP>

The administrator will then be invited by email to your new site. Once your administrator logs in with his or her Blackbaud single sign-on credentials, the individual application users can then be invited by email from *Administration*, **Application Users**.

Add ResearchPoint Users

As you begin to use **ResearchPoint**, it's important to review program roles and invite users in your organization who need to complete research or view research results. When you add users, if the user already has an account for the Blackbaud.com website, invite the email address associated with that account.

How to Add Users

1. As your organization's **ResearchPoint** administrator or assigned Prospect Research Manager, log in to **ResearchPoint**.
2. From **Administration**, click **Application users**.
3. Click **Add**. Enter the full name and email address of the user to invite.
Tip: If the user already has an account for the Blackbaud.com website, invite the email address associated with that account.
 To determine the email address used for a Blackbaud.com website account, have the user click the **Welcome** in the upper right corner. Then, click the **Account** option. The email address used appears at the top of the page.
4. If a user is also a fundraiser, you need to link the user to a constituent record to see the My Fundraiser page. If a constituent record doesn't exist yet, you can still add the application user and link the records later.
5. Select which role or roles the user needs to perform tasks in **ResearchPoint**. If you

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 are the administrator and do not have an email address associated with your user name yet, contact [ResearchPoint Customer Support](#) for assistance.

assign someone as a Prospect Research Manager, you also need to select the Prospect Research role.

6. Click **Save & Invite**. The new user receives an email with a link to join **ResearchPoint**.
7. If you click **Save** only, the new user is created but they will not receive an invite to join until you send the invitation.
8. When the application user receives an email to join **ResearchPoint**, to accept the invitation they must confirm the email.
Tip: Only the email address that was invited can click confirm. If the wrong email address was invited, edit the email address in **ResearchPoint**, do not forward the invite. You will receive an error message when you attempt to log in, if you log in with a different email address than the one invited.
When you click confirm, the Blackbaud Account Sign in page opens.
9. Sign in with your existing Blackbaud single sign-on account or click **Sign up!** to create a new account.
10. After you sign in or sign up, the **ResearchPoint** home page appears. To edit your name or email address, click **Welcome, Account** from the Omnibar at the top of the page.

ResearchPoint User Roles

Prospect Research – This is the main role in **ResearchPoint**. Assign prospect research 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.

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

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) – This role builds on the Development Officer - View Only role. 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.

Email Services Administrator and Email Services User - A system role that comes with the program, but not necessary for you to use.

When you add and invite users to have access to **ResearchPoint**, they are also linking their **ResearchPoint** credentials to their Blackbaud single sign-on account. With this account, users can switch between **ResearchPoint**, Blackbaud.com website, and other single sign-on enabled products without having to log in and log out with different credentials. You only have one login credential to remember.

Connect ResearchPoint to your Raiser's Edge Database

If you actively use both **ResearchPoint** and the **Raiser's Edge**, we recommend you integrate them to enhance your major giving research and development capabilities. To learn about the integration and how to configure the two databases, use the following resources:

How-to PDF

Set Up Raiser's Edge Integration



How-to PDF

Raiser's Edge Integration Guide



Quick Tips for Successful Integration

- In the **Raiser's Edge**, create queries of constituents to research. In **ResearchPoint**, create new research lists from those queries.
- After you link **ResearchPoint** and **Raiser's Edge** records, perform a wealth screen. The program uses the latest biographical and address information from the **Raiser's Edge** to match data in Target Analytics.
- On a prospect record Biographical Information tab, view the **Raiser's Edge** phone numbers, email addresses, and addresses below the **ResearchPoint** contact information. No syncing required to see the latest data from **Raiser's Edge**!
- When you configure the fields for integration, use the descriptions for each option to confirm the data you want to sync to and from the **Raiser's Edge**.

Tip: To use a query from **The Raiser's Edge** in **ResearchPoint** for research lists, you need to include the **RE system record ID** in **The Raiser's Edge** query output.

Overview of ResearchPoint Resources

Learning a new program can present both opportunities to enhance skills and frustrations when you encounter an error. No matter the situation, we're here to help. Use the chart below to determine which resource fits your need.

Troubleshooting	How-to	Training & Services	Peer-to-Peer
<p>Knowledgebase</p> <ul style="list-style-type: none"> • Answers to software problems • Search here before you contact Customer support • For greater accuracy, filter results by product 	<p>In-Product Tips & Help Panel</p> <ul style="list-style-type: none"> • Look for tips icon for helpful instructions • Use help icon in upper right corner of the page to access the ResearchPoint help 	<p>Blackbaud Learn</p> <ul style="list-style-type: none"> • Free and paid training on common tasks • Annual subscriptions with access to instructor-led classes • Role-based curriculum • Strategy and best practice sessions 	<p>Target Analytics Community</p> <ul style="list-style-type: none"> • Get answers to your questions from your peers • Discuss best practices with peers and Blackbaud experts • Latest product news • Provide feedback directly to ResearchPoint product development team
<p>Customer Support Chat</p> <ul style="list-style-type: none"> • Available: Mon-Thu 8:30am to 8:00pm and Fri 9:00am to 8:00pm • Instant message Support Analysts to troubleshoot your program questions 	<p>ResearchPoint How-to Page</p> <ul style="list-style-type: none"> • User guides, tip sheets, release notes, and more • Access helpful how-to videos and information about the latest new features <p>Blackbaud Hosting Services How-to Page</p> <ul style="list-style-type: none"> • A resource page about your Blackbaud Hosting Services • Check the status of hosting 	<p>Consulting</p> <ul style="list-style-type: none"> • Seasoned consultants provide 1:1 custom implementation consulting to help you develop effective strategies • Ensure your team fully utilizes data with your Target Analytics project • Contact Blackbaud Account Representative for pricing and packages 	

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!