

What is Donor Search FAQ

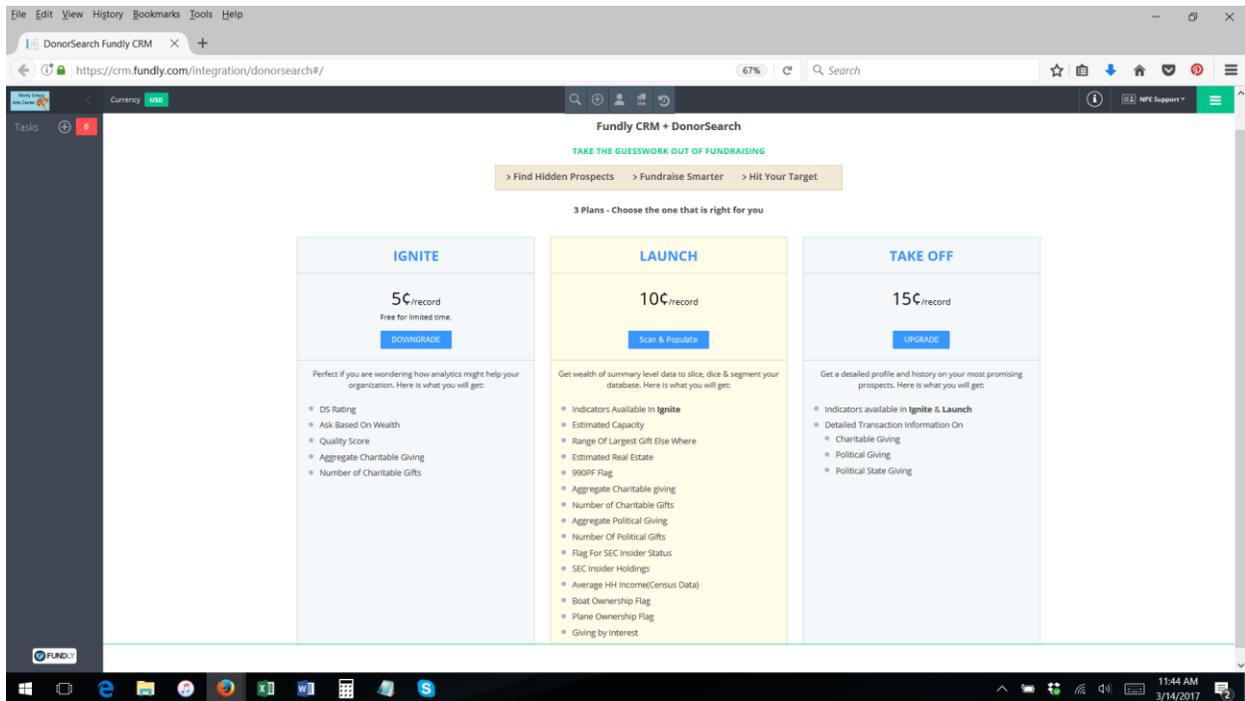
1. Donor Search is a third-party company that provides wealth and philanthropic giving history information pulled from a variety of sources including the FEC Political Database, the SEC Political Giving Database, and the IRS 990PF Profiles.
2. The Donor Search-Fundly CRM integration will search the Donor Search database for your existing contacts and populate wealth and philanthropic giving information to the contact's record if matching information is found.
3. Donor Search matches your contacts to the Donor Search database based on: First Name, Last Name, Mailing Address Line 1, City, State, Zip, AND Country **(these fields are required to pull Donor Search information for a contact)**.
4. Since there could be multiple people with the same first and last name living in the same city/zip code, Donor Search also provides a confidence score (called a "Quality Score" for each contact record, indicating how confident it feels that the data found is for that specific person/contact. A Quality Score of 18 or higher indicates a high degree of confidence the contact matches the data found.

The screenshot displays the Fundly CRM interface for a contact's details. The 'Wealth Profile' section is highlighted with a red box, showing the following information:

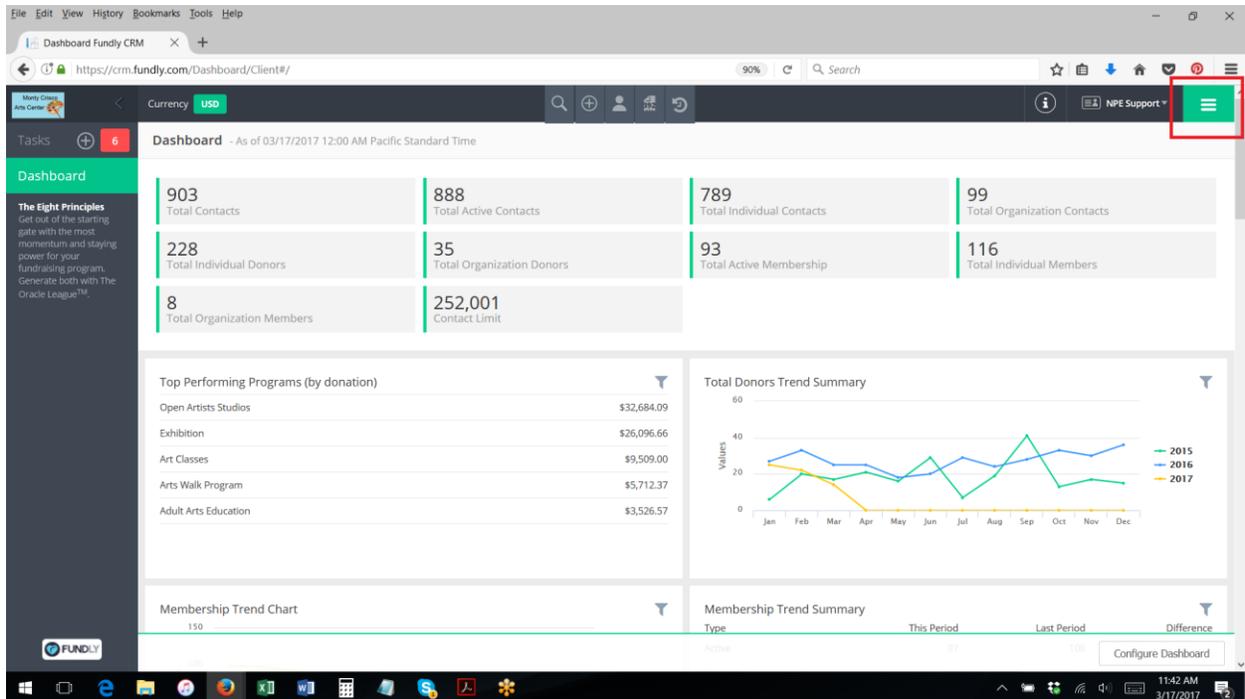
DS Rating	Ask Based On Wealth	Quality Score	Aggregate Charitable Giving	Number Of Charitable Gifts
DS3	\$5,000 - \$9,999	0	\$0.00	0

The 'Quality Score' of 0 is circled in red. Other sections visible include 'Communication Preferences', 'Special Comments', and 'Stage of Development'. The 'Special Comments' section shows two entries: 'NPE Support' dated Aug 22, 2016, and 'NPE Support' dated Oct 12, 2016. The 'Stage of Development' section shows a table with columns for Stage Of Development, Start Date, End Date, and Interaction Count, but it contains no records.

5. Donor Search provides three levels of wealth and giving information on contacts:



6. Donor Search integration is a “pay per use” service, with users charged per contact record searched. You will only be charged for Donor Search when you scan records (to populate initial data or to update existing data).
7. The Donor Search integration was automatically turned on for all clients who had logged into their CRM v2 account within the last 30 days as of March 22, 2017. For all other clients, the Donor Search integration must first be turned on to be used. To do this, from the **Main Menu**, select **Integrations**, then select **Donor Search**.



File Edit View History Bookmarks Tools Help

Dashboard Fundy CRM

https://crm.fundly.com/Dashboard/Client#

- Active Modules
- Integrations**
- Add-ons

Configurations

- Dashboard
- File Import Processing
- Import Utility
- Financials
- Pages
- Donation Widget
- The Eight Principles

Fundraising

- Appeals
- Batch Gift Entry
- Batch Pledge Entry
- Gifts
- Grants
- Pledges
- Premium Fulfillment

Communications

- Labels & Letters
- Manage Templates
- Newsletter
- Send Acknowledgements
- Year End Thank You

Memberships

- Benefit Fulfillment
- Manage Membership
- Batch Renewal

Meal

- Package Configuration
- Meal Planner
- Delivery Planner
- Labels & Letters

Contacts

- Add Individual
- Add Organization
- Manage Duplicates
- Advanced Search

Reports

- Agency Reports
- Default Reports
- Enhanced Reports
- View All

Chapters

- Chapter Creation
- Chapter List

Events

- Create Event
- Events
- Quick Ticketing

Settings

- Acknowledgment Settings
- Default Salutation
- Invoice Number
- Invoice Setting
- Financial Settings
- Hygiene Rules
- Payment Gateway Settings

Arts Walk Program	\$5,712.37
Adult Arts Education	\$3,526.57

Membership Trend Chart

Membership Trend Summary

Configure Dashboard

File Edit View History Bookmarks Tools Help

View Contact Details Fund... Integrations - Fundly Sup...

https://crm.fundly.com/ContactManagement/Individual/Details/#view/409561/5c35d7bf-1266-4f02-b4ec-5e8a2e22c20c

- Active Modules
- Integrations**
- Add-ons

2017 Annual Fund - Gift Card to Hallmark Store 03/14/2017 \$75.00

View Chart View All Giving Details

Wealth Profile
Summary as on Mar 22, 2017 12:00:00 AM

DS3	\$5,000 - \$9,999	0	\$0.00	0
DS Rating	Ask Based On Wealth	Quality Score	Aggregate Charitable Giving	Number Of Charitable Gifts

View Summary

Powered by @2017 DonorSearch

Communication Preferences

Phone Call - Yes Send Mail - Yes Send Email - Yes

Edit Contact Layout Configuration Actions

8. Donor Search Basic/Ignite Level information will appear on the View Contact screen, below the contact's financial information.

The screenshot shows the 'View Contact Details' page in Fundly CRM. The 'Wealth Profile' section is highlighted with a red box. It displays a summary as of Mar 22, 2017 12:00:00 AM with the following metrics:

DS3	\$5,000 - \$9,999	0	\$0.00	0
DS Rating	Ask Based On Wealth	Quality Score	Aggregate Charitable Giving	Number Of Charitable Gifts

Below the wealth profile, there are 'Communication Preferences' (Phone Call: Yes, Send Mail: Yes, Send Email: Yes) and 'Special Comments' (NPE Support, TEST).

9. By default, Donor Search information is only viewable by system Admins. Other users' access to the Donor Search information can be set in the User Roles/Permissions area.

The screenshot shows the 'Application Roles' configuration page in Fundly CRM. The 'Donor Search' role is selected. The 'Basic View' and 'Summary View' sections show permissions for 'View' with radio buttons for 'Allow' and 'Deny'.

View	View	Allow	Deny
BasicView	View	<input type="radio"/>	<input type="radio"/>
SummaryView	View	<input type="radio"/>	<input type="radio"/>

10. If you have bought the Launch or Take-Off level Donor Search data, click the **View Summary** button to see the detailed donor profile (to upgrade or downgrade your Donor Search subscription/data access level, see our [Donor Search: How to Upgrade/Downgrade Your Subscription](#) tutorial).

The screenshot shows the Fundly CRM interface for a donor's contact details. The page is titled "View Contact Details Fund..." and includes a navigation sidebar on the left with options like "Tasks", "Contacts", "Add Individual", "Add Organization", "Manage Duplicates", and "Advanced Search". The main content area is divided into several sections:

- Gift Summary:** A table showing gift history.

Gift Type	Amount	Date
First Gift (Aug 17, 2016)	\$546.00	12/4/2017
Lifetime Gift	\$27.30	
Average Gift	\$25.00	
Most Common Gift	\$25.00	-8 Recency (Months)
Largest Gift	\$101.00	20 Number of Gifts
- Wealth Profile:** A section titled "Wealth Profile" with a sub-header "Summary as on Mar 22, 2017 12:00:00 AM". It contains several metrics:

DS3 (DS Rating)	\$5,000 - \$9,999 (Ask Based On Wealth)	0 (Quality Score)	\$0.00 (Aggregate Charitable Giving)	0 (Number of Charitable Gifts)
-----------------	---	-------------------	--------------------------------------	--------------------------------

 A red box highlights the "View Summary" button in this section.
- Communication Preferences:** A section with checkboxes for "Phone Call: Yes", "Send Mail: Yes", and "Send Email: Yes".
- Special Comments:** A table of notes, including "NPE Support" and "TEST".
- Stage of Development:** A section for tracking the donor's development stage, currently showing "No records found."

11. This will show the contact's detailed giving profile. To see a definition for each item, see our [Donor Search: Wealth Information Profile Terms/Definitions](#) tutorial.

The screenshot shows the Fundly CRM interface displaying a "Summary of Abby Jacks" dialog box. The dialog box is titled "Summary of Abby Jacks" and includes a close button in the top right corner. It features a green banner at the top stating "Your Current Plan is Launch." Below this, the profile is organized into two main sections: "Wealth Profile" and "By Interest".

Wealth Profile:

DS3 (DS Rating)	0 (Quality Score)	\$6,771.00 (Estimated Capacity)	\$0.00 - \$0.00 (Range Of largest Gift Else Where)
\$0.00 (Estimated Real Estate)	NA (990PF Flag)	\$0.00 (Aggregate Charitable giving)	0 (Number of Charitable Gifts)
\$0.00 (Aggregate political giving)	0 (Number of Political Gifts)	NA (Flag for SEC Insider Status)	\$0.00 (SEC Insider Holdings)
\$67,705.00 (Average HH Income(census data))	NA (Boat Ownership Flag)	NA (Plane Ownership Flag)	

By Interest:

0 (Number of Gifts in Higher Education)	\$0.00 (Higher Education Total)	0 (Number of Education Gifts)	\$0.00 (Aggregate Education Giving)
0	\$0.00	0	\$0.00

The dialog box also includes a "Close" button at the bottom right.

Summary of Abby Jacks

\$67,705.00 Average HH Income(census data)	NA Boat Ownership Flag	NA Plane Ownership Flag
---	---------------------------	----------------------------

By Interest

0 Number of Gifts in Higher Education	\$0.00 Higher Education Total	0 Number of Education Gifts	\$0.00 Aggregate Education Giving
0 Number of Philanthropy and Grant Gifts	\$0.00 Aggregate Philanthropy And Grant Giving	0 Number of Healthcare Gifts	\$0.00 Aggregate Healthcare Giving
0 Number of Arts Gifts	\$0.00 Aggregate Arts Giving	0 Number of REP Gifts	\$0.00 Aggregate REP Giving
0 Number of DEM Gifts	\$0.00 Aggregate DEM Giving	0 Number of Other Political Gifts	\$0.00 Aggregate Other Political Giving
0 Number of Society Benefit Gifts	\$0.00 Aggregate Society Benefit Giving	0 Number of Gifts for Religion	\$0.00 Aggregate Giving for Religion

Close

12. If you have the Take Off Level data subscription, click the **Detail Profile Button** in the upper right to see the details of individual donations made by the contact, grouped by category.

Summary of Abby Jacks

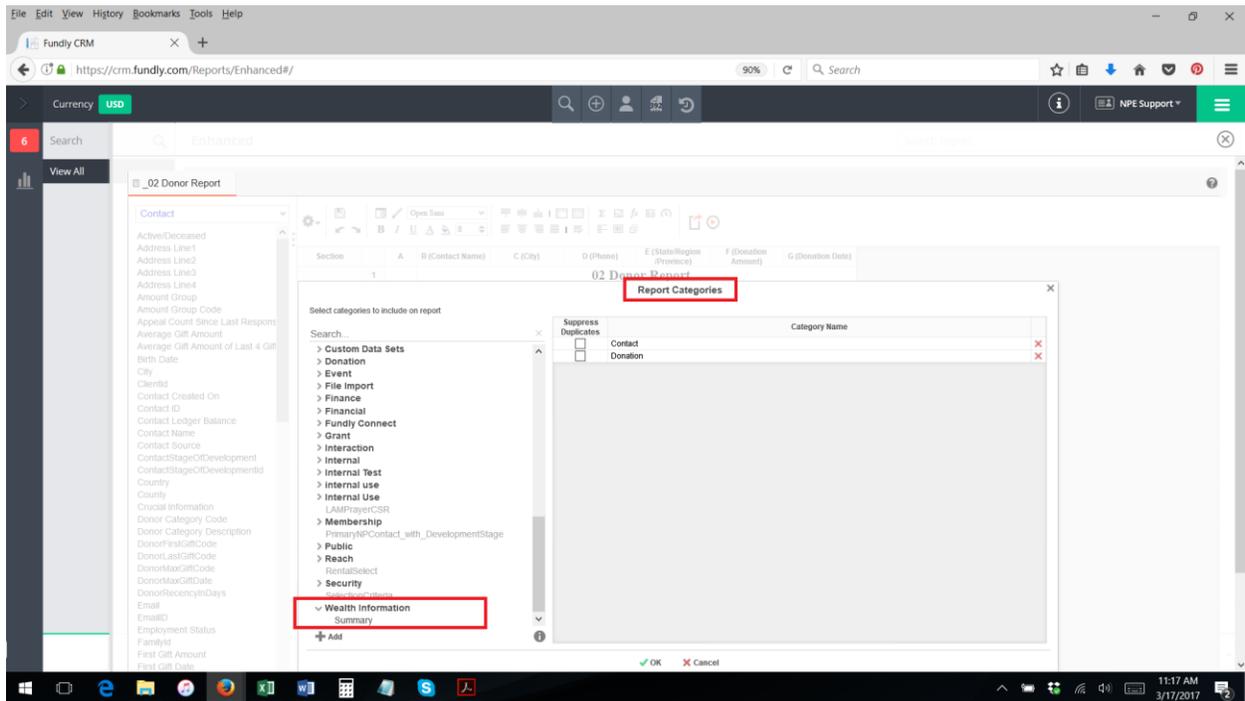
Your Current Plan is **Take off**. Detail Profile

DS3 DS Rating	\$5,000 - \$9,999 Ask Based On Wealth	0 Quality Score	\$6,771.00 Estimated Capacity
\$0.00 - \$0.00 Range Of largest Gift Else Where	\$0.00 Estimated Real Estate	NA 990PF Flag	\$0.00 Aggregate Charitable giving
0 Number of Charitable Gifts	\$0.00 Aggregate political giving	0 Number of Political Gifts	NA Flag for SEC Insider Status
\$0.00 SEC Insider Holdings	\$67,705.00 Average HH Income(census data)	NA Boat Ownership Flag	NA Plane Ownership Flag

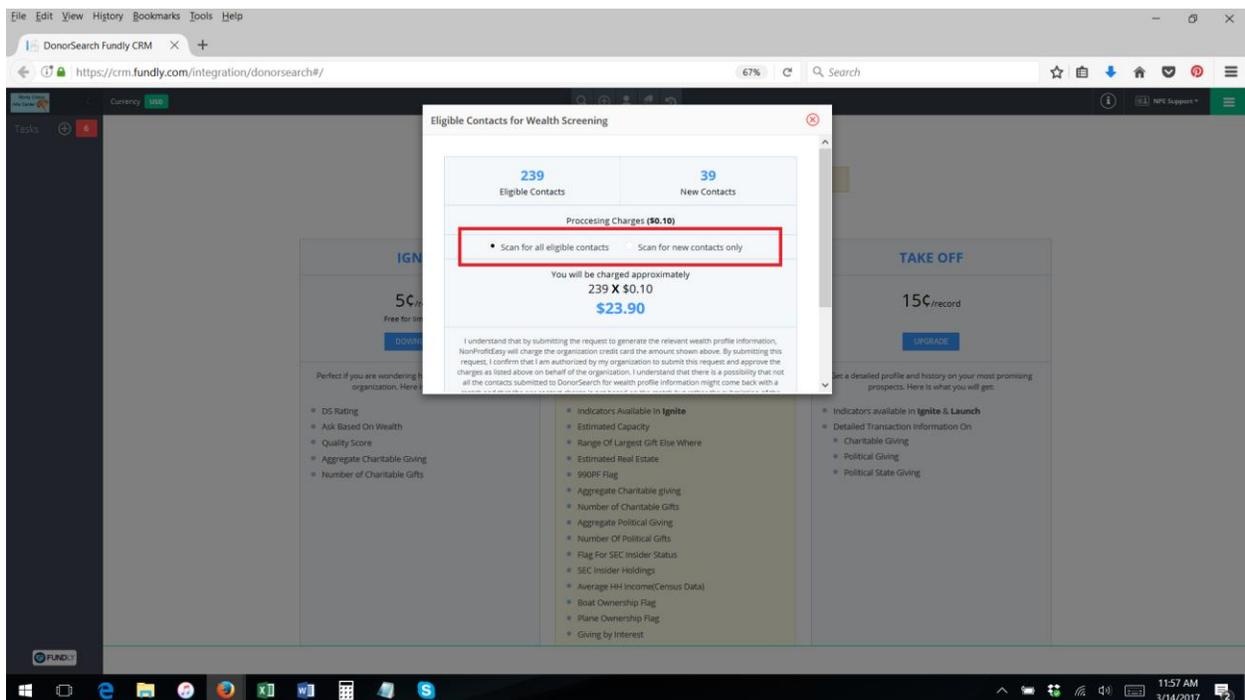
By Interest

0 Number of Gifts in Higher Education	\$0.00 Higher Education Total	0 Number of Education Gifts	\$0.00 Aggregate Education Giving
0 Number of Philanthropy and Grant Gifts	\$0.00 Aggregate Philanthropy And Grant Giving	0 Number of Healthcare Gifts	\$0.00 Aggregate Healthcare Giving

Close



14. You can refresh/update the wealth/donor information as frequently as you like (see the [“Donor Search: How to Add/Update Donor Search Wealth Information to Contact Records”](#) tutorial for details). Generally, it is not necessary to rescan contacts more frequently than every 6-12 months.
15. You can scan the Donor Search database for all existing contacts or just for contacts added to your CRM since the last time you scanned the Donor Search database.



16. See also our [Donor Search: Frequently Asked Questions](#) tutorial.