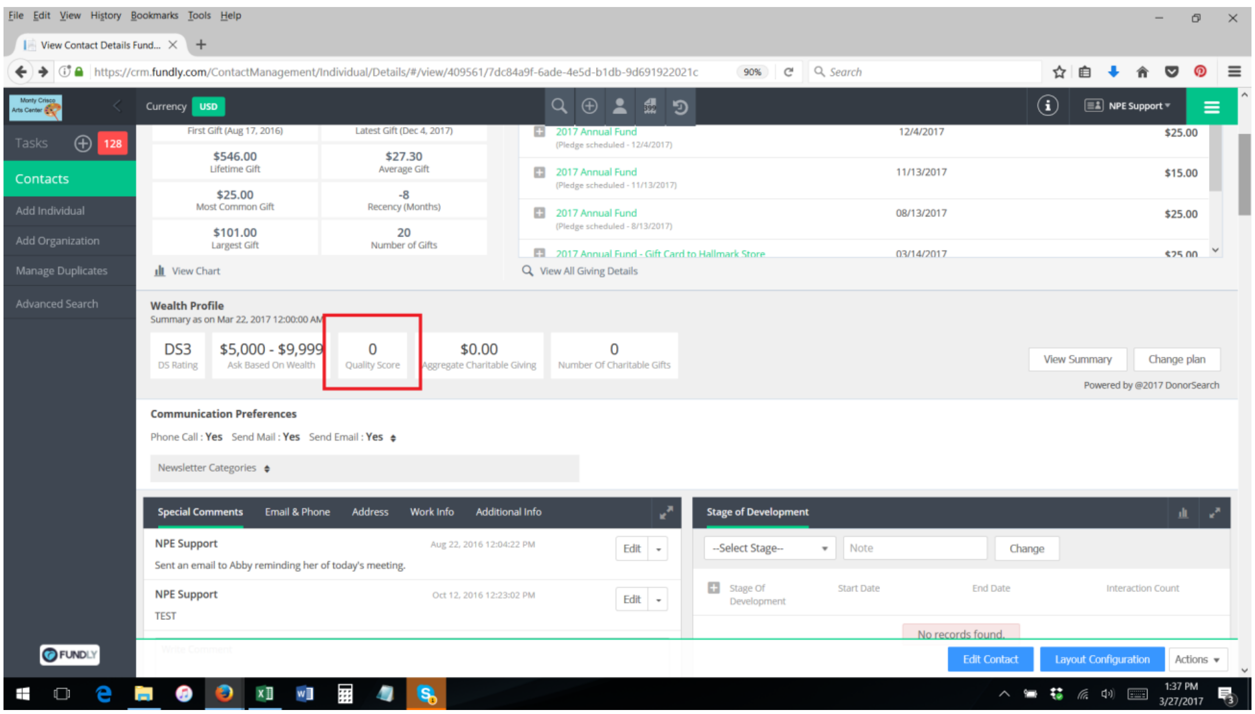
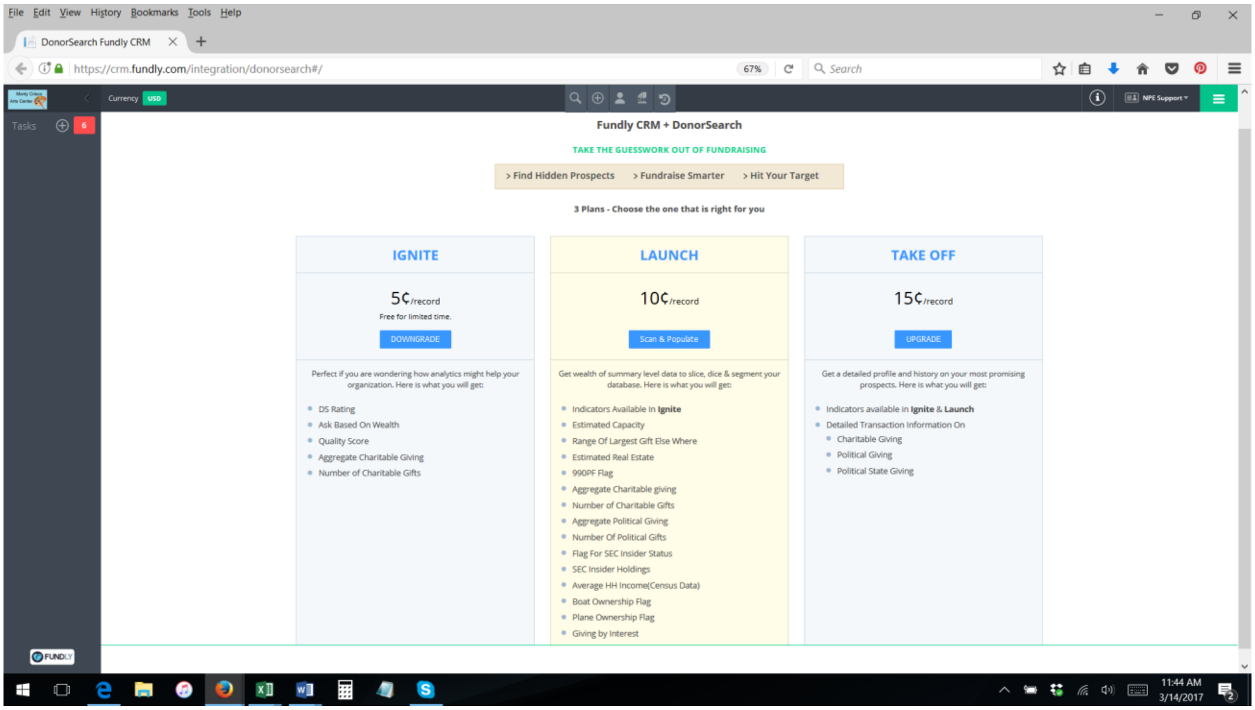
**What is Donor Search FAQ**

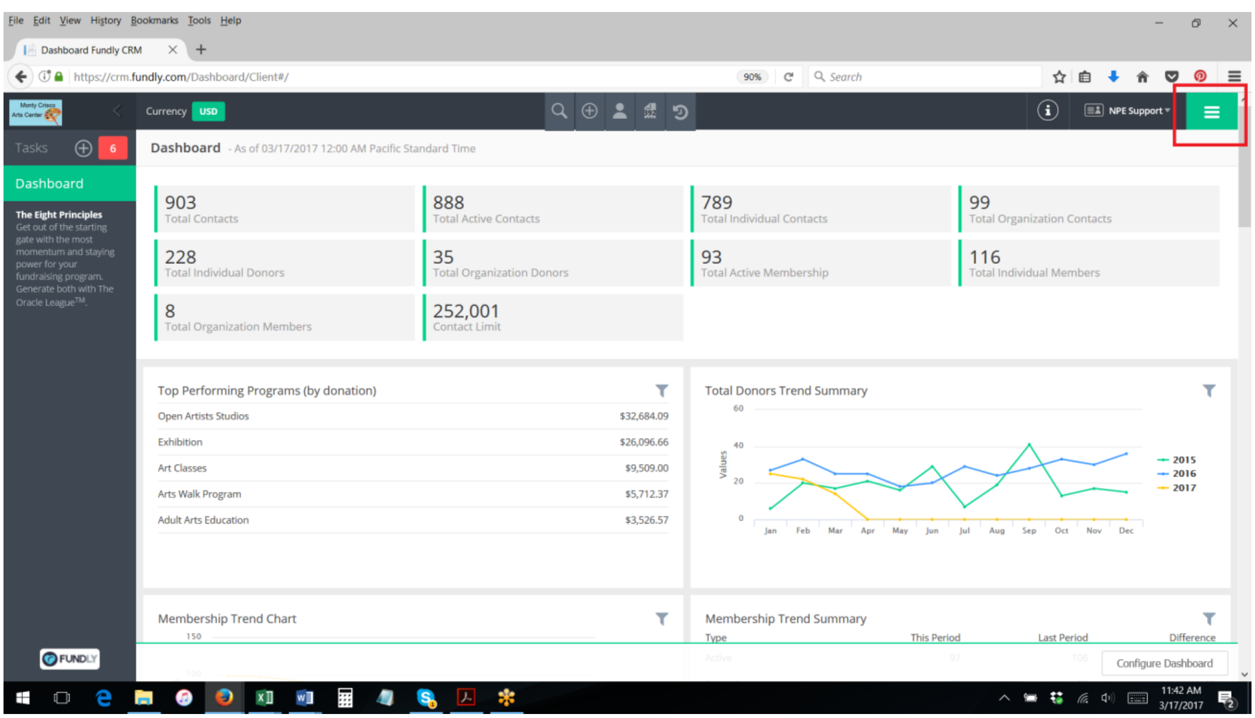
1. Donor Search is a third-party company that provides wealth and philanthropic giving history information pulled from a variety of sources including the FEC Political Database, the SEC Political Giving Database, and the IRS 990PF Profiles.
2. The Donor Search-Fundly CRM integration will search the Donor 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.

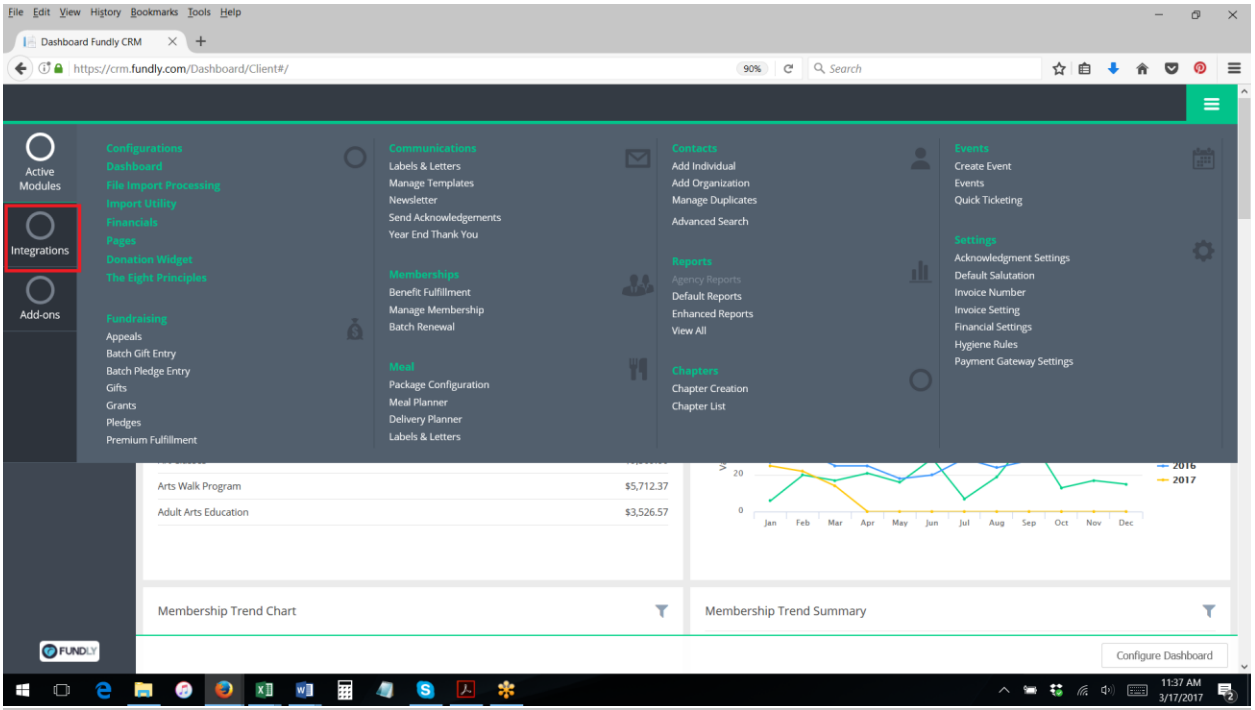


5. Donor Search provides three levels of wealth and giving information on contacts:




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
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Active Modules
Integrations
Add-ons
Configurations
Dashboard
File Import Processing
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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
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Agency Reports
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Acknowledgment Settings
Default Salutation
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Invoice Setting
Financial Settings
Hygiene Rules
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Membership Trend Chart
Membership Trend Summary
Configure Dashboard
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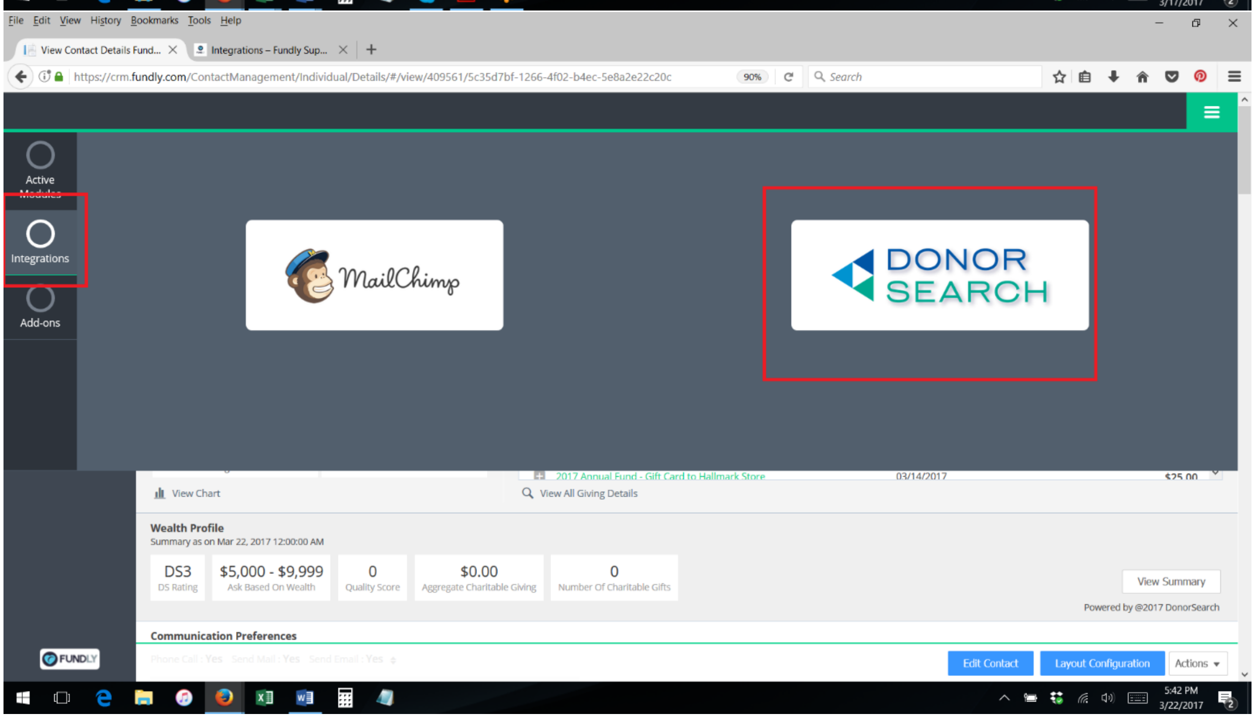
File Edit View History Bookmarks Tools Help
View Contact Details Fund...
Integrations – Fundly Sup...
https://crm.fundly.com/ContactManagement/Individual/Details/#/view/409561/5c35d7bf-1266-4f02-b4ec-5e8a2e22c20c
Active Modules
Integrations
Add-ons
MailChimp
DONOR SEARCH
View Chart
View All Giving Details
Wealth Profile
Summary as on Mar 22, 2017 12:00:00 AM
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View Summary
Powered by @2017 DonorSearch
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Edit Contact
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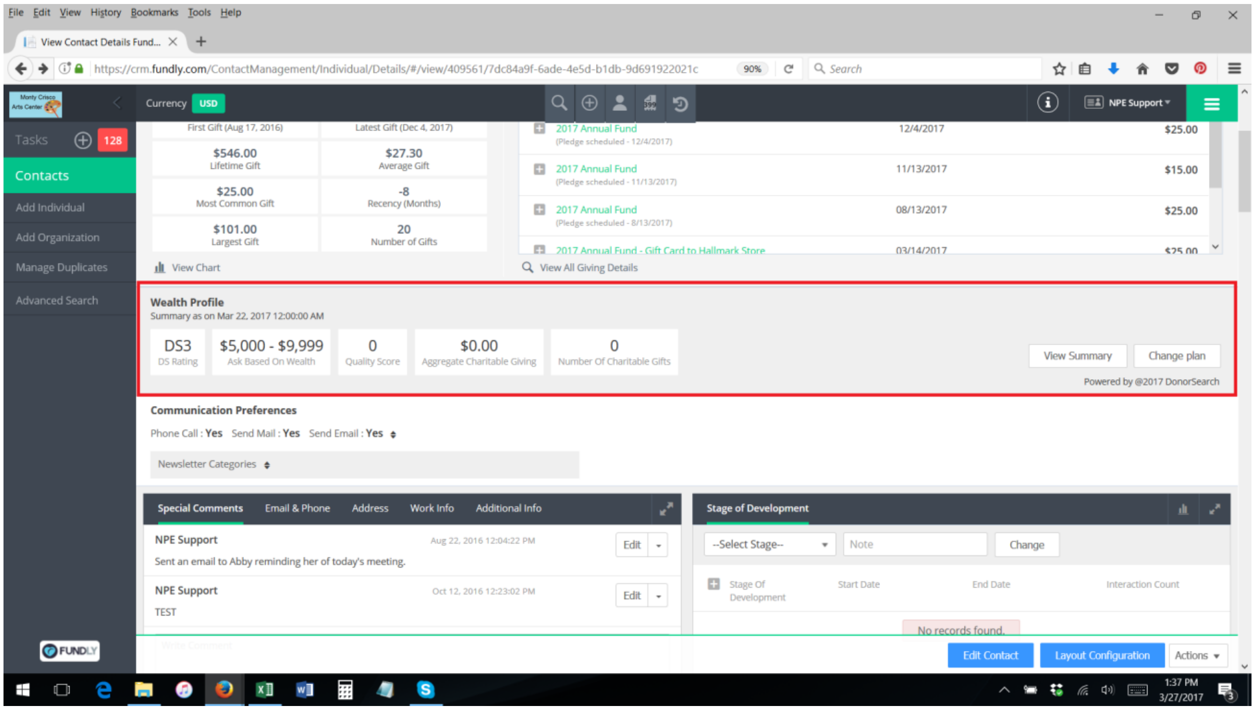
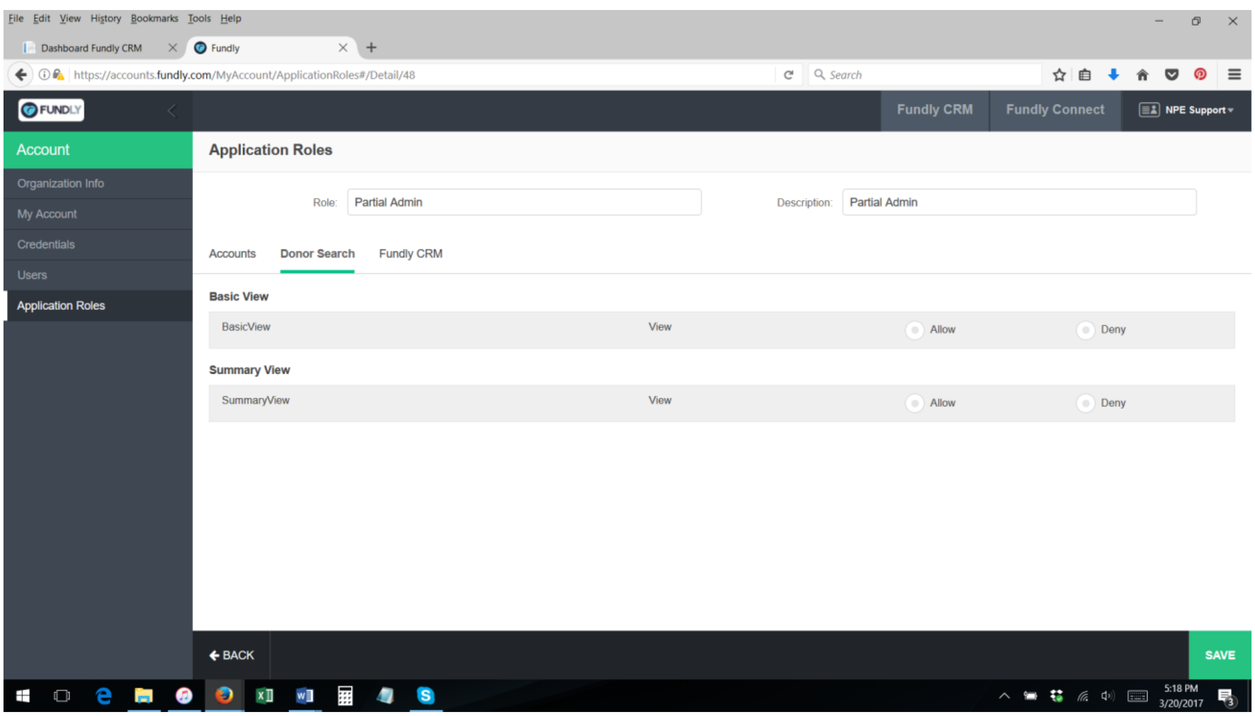
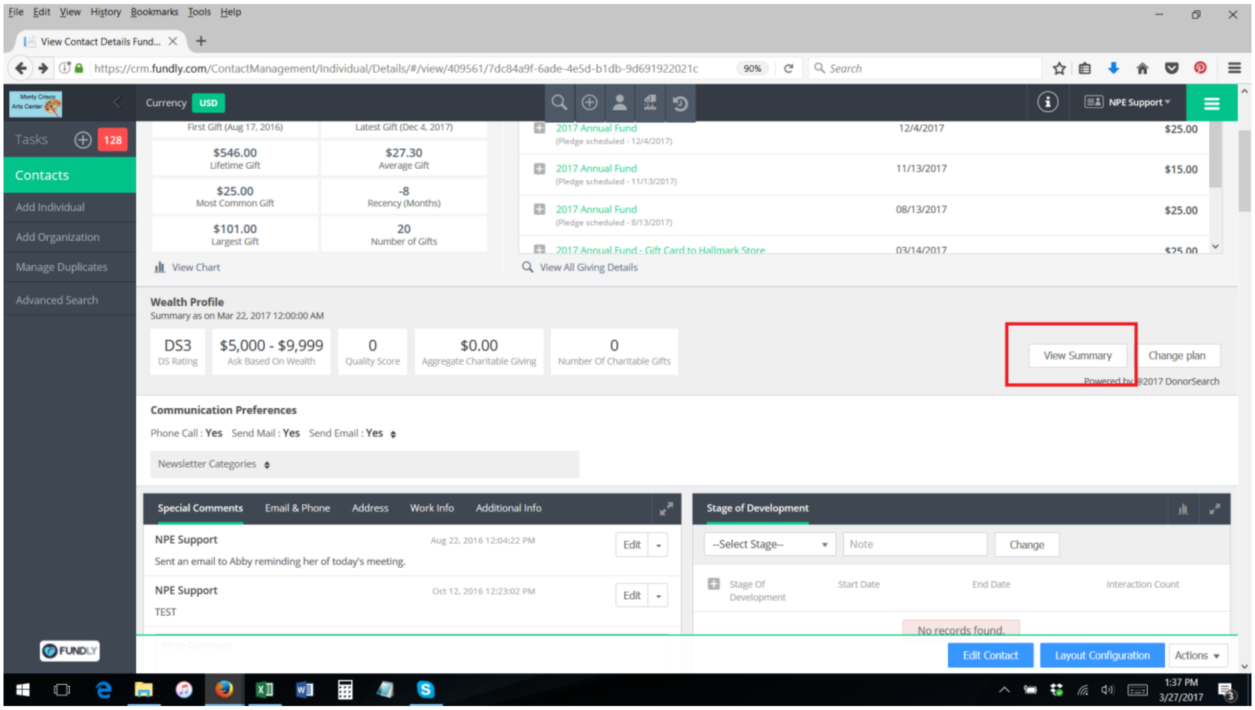
8. Donor Search Basic/Ignite Level information will appear on the View Contact screen, below the contact's financial information.



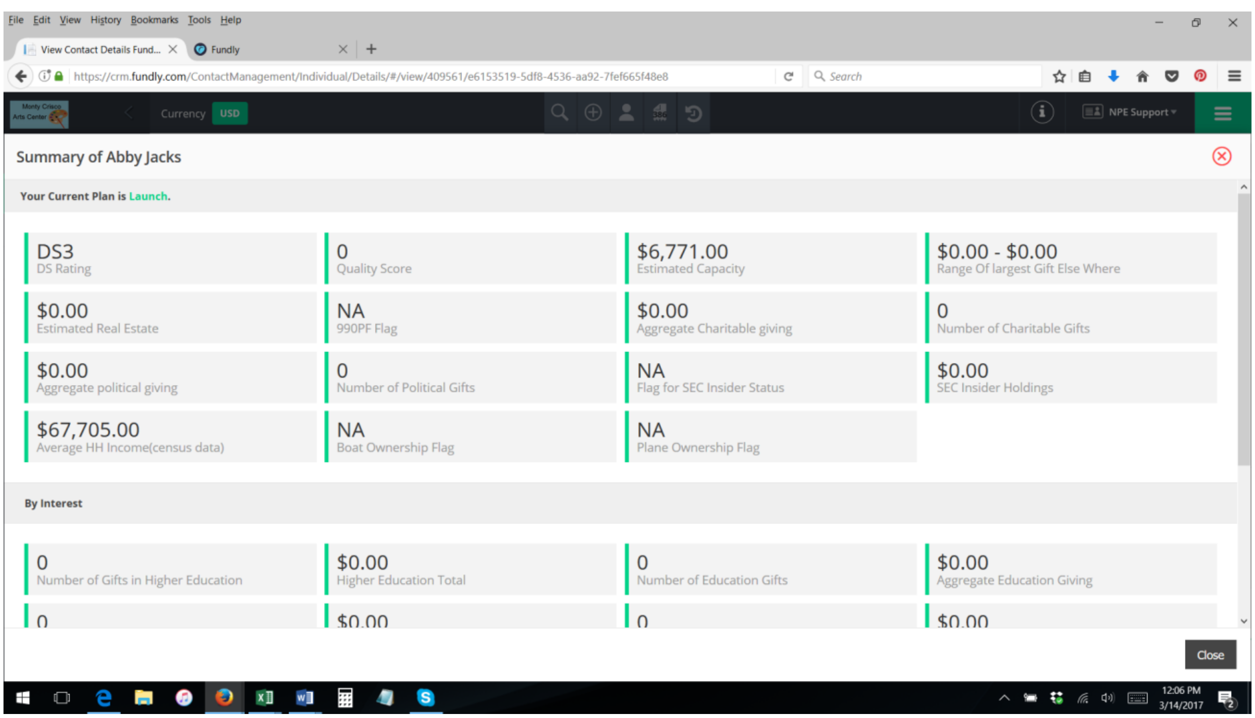

9. **By default, Donor Search information is only viewable by system Admins**. Other users' access to the Donor Search information can be set in the User Roles/Permissions area.

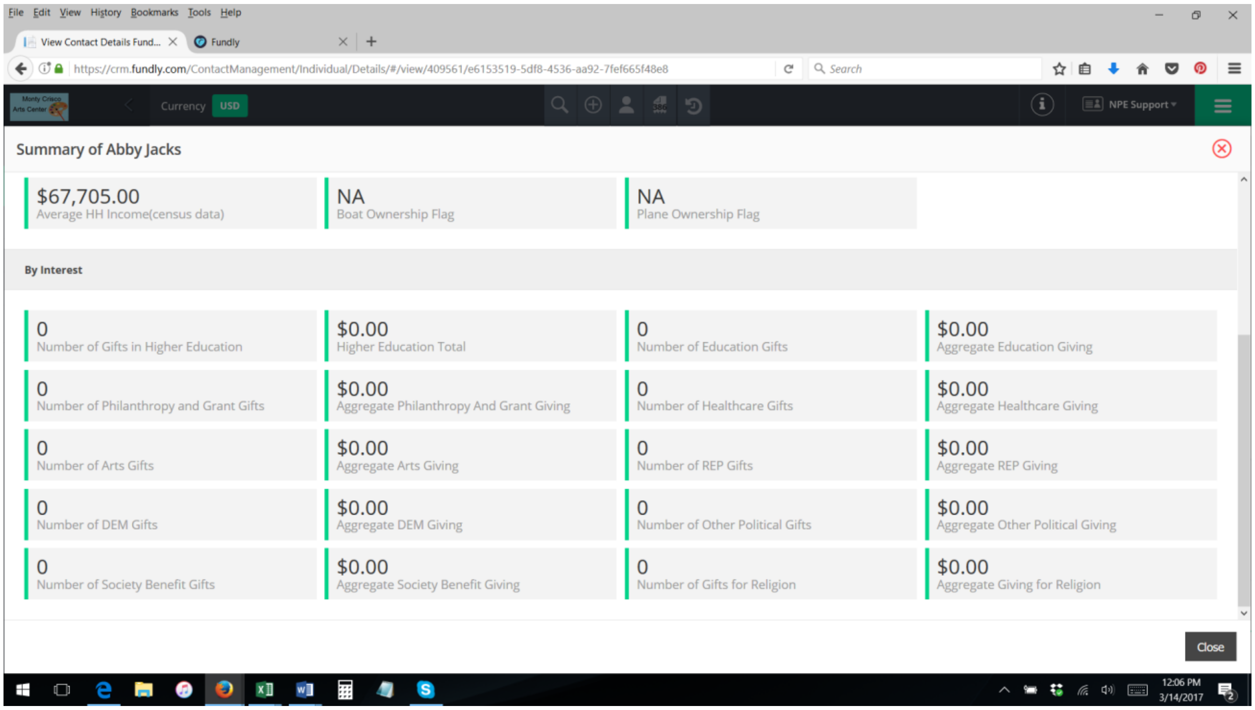


10. If you have bought the Launch or Take-Off level Donor Search data, click the **View Summary** button to see the detailed donor profile (to upgrade or downgrade your Donor Search subscription/data access level, see our **Donor Search: How to Upgrade/Downgrade Your Subscription** tutorial).

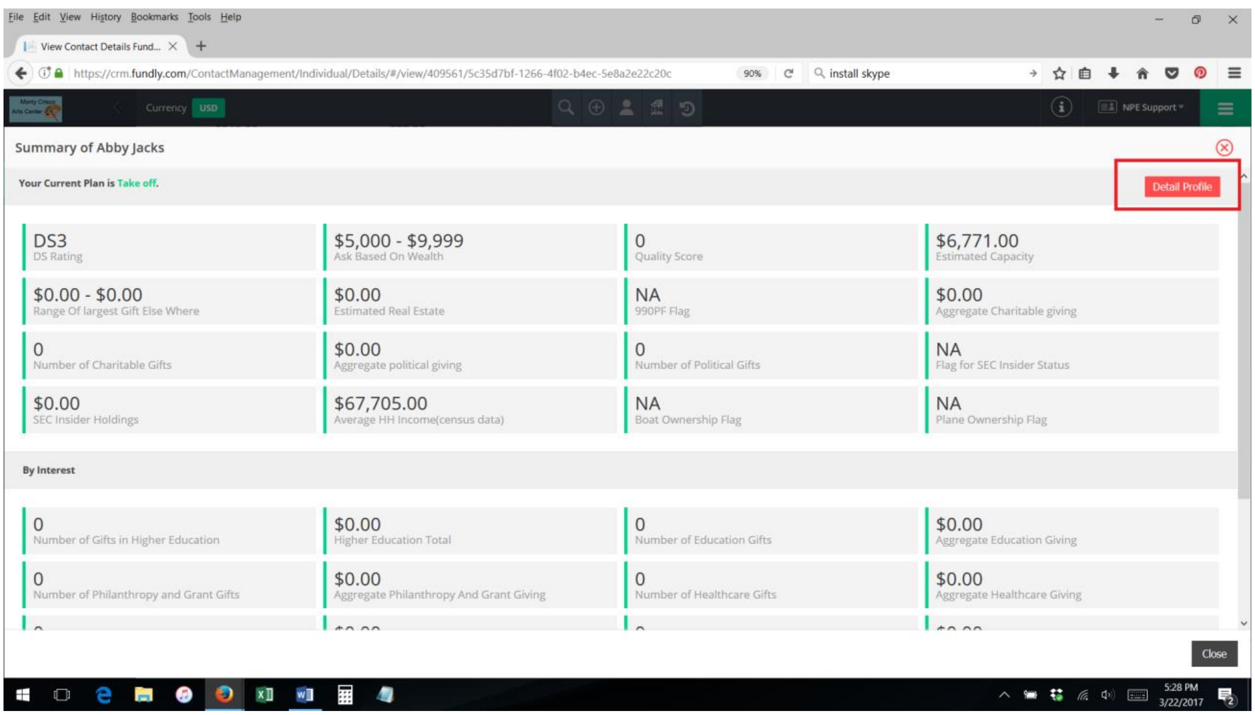


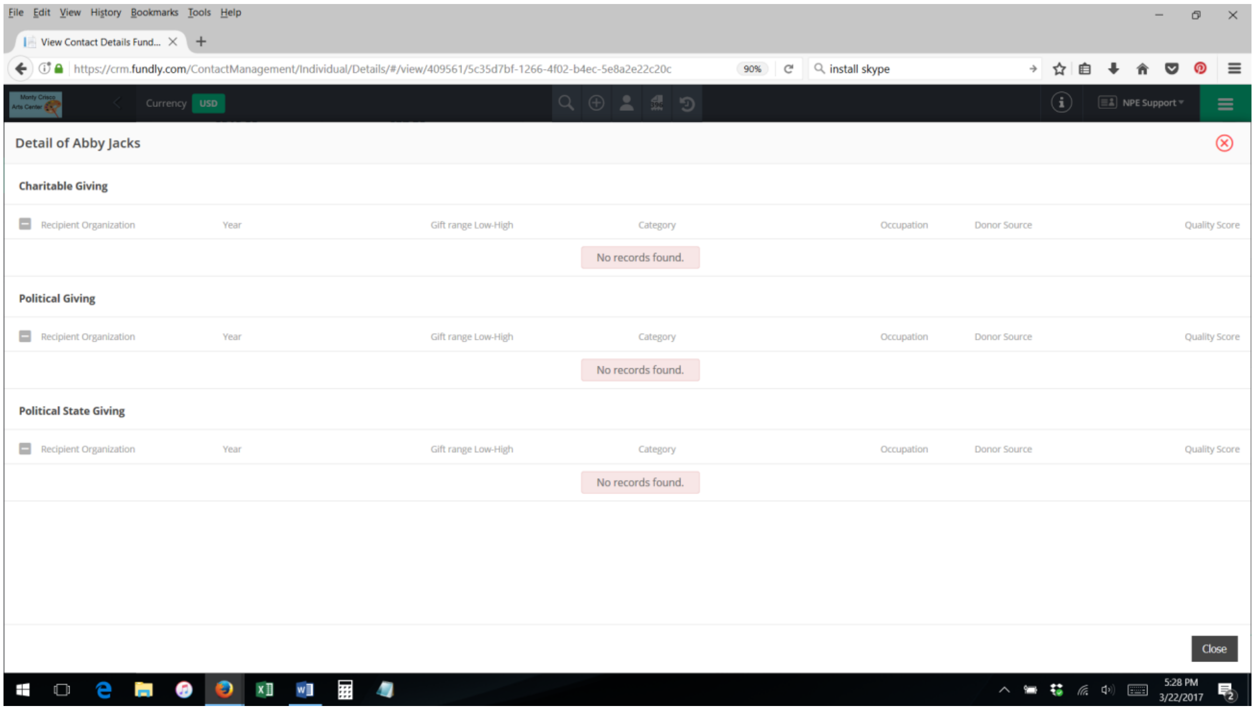
11. This will show the contact's detailed giving profile. To see a definition for each item, see our **Donor Search: Wealth Information Profile Terms/Definitions** tutorial.



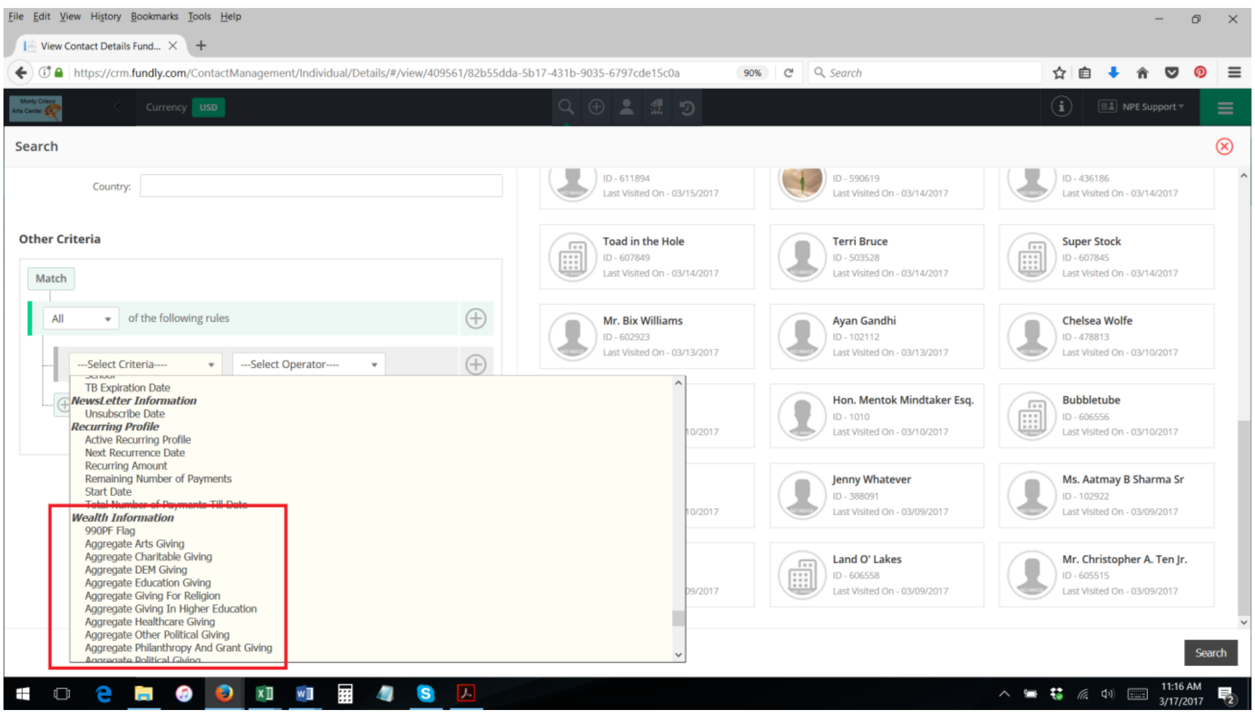


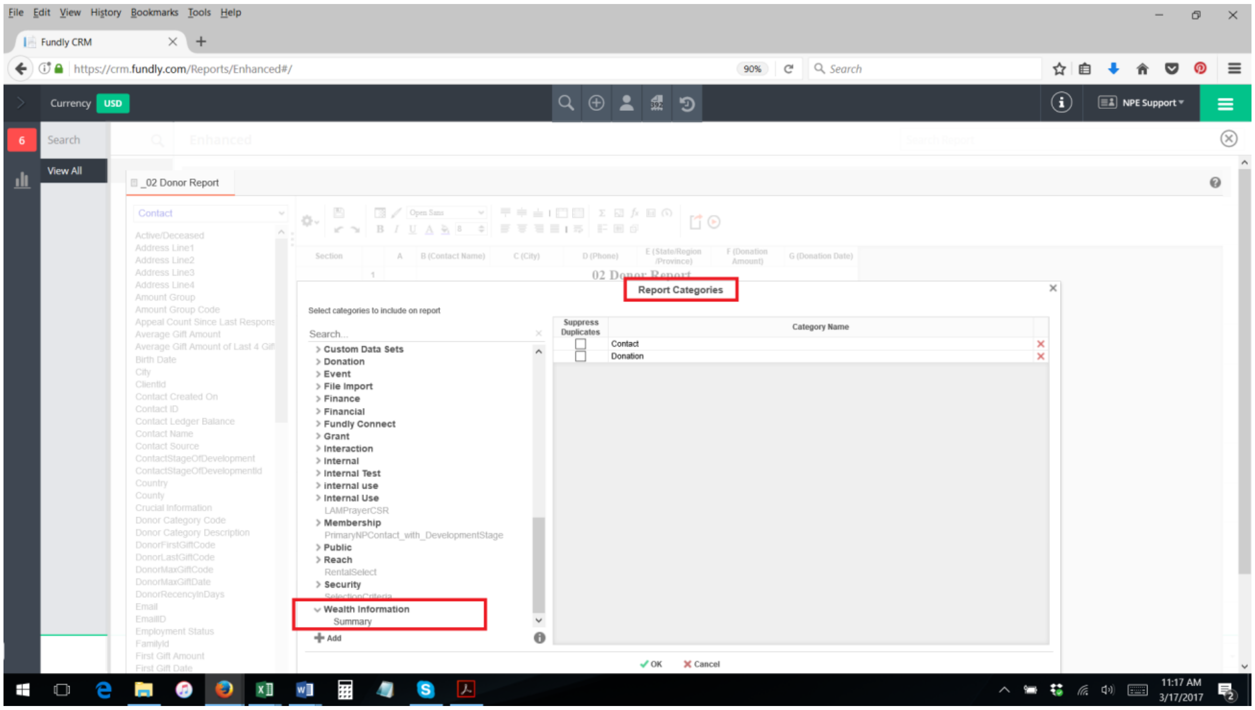
12. If you have the Take Off Level data subscription, click the **Detail Profile Button** in the upper right to see the details of individual donations made by the contact, grouped by category.



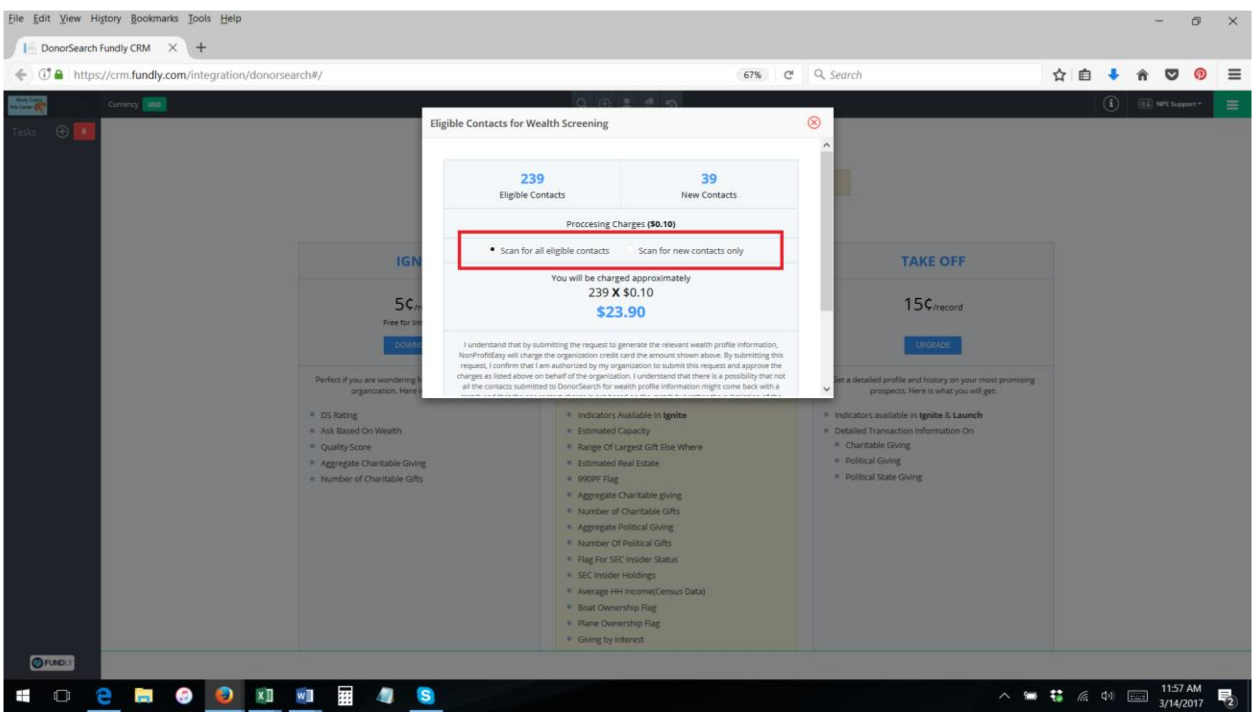


13. You can search on Donor Search wealth information in Advanced Search and in Reports.






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.