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Overview

This article walks through the steps to connect your **DonorSearch** (wealth screening) account with your **Trail Blazer** account.

**If* you have an existing DonorSearch account, you are all set and can begin the integration. If you don't, we offer a variety of different price points with our DonorSearch partnership that fit a variety of needs. You can learn more on our Additional Services page:

<https://www.trailblz.com/Support/AdditionalServices>

 **Tip:** new to wealth analysis? You can learn more on how these services can help you to raise more money for your cause:

<https://www.trailblz.com/Non-Profit-Donor-Management-Software/Wealth-Screening> & on the DonorSearch website:

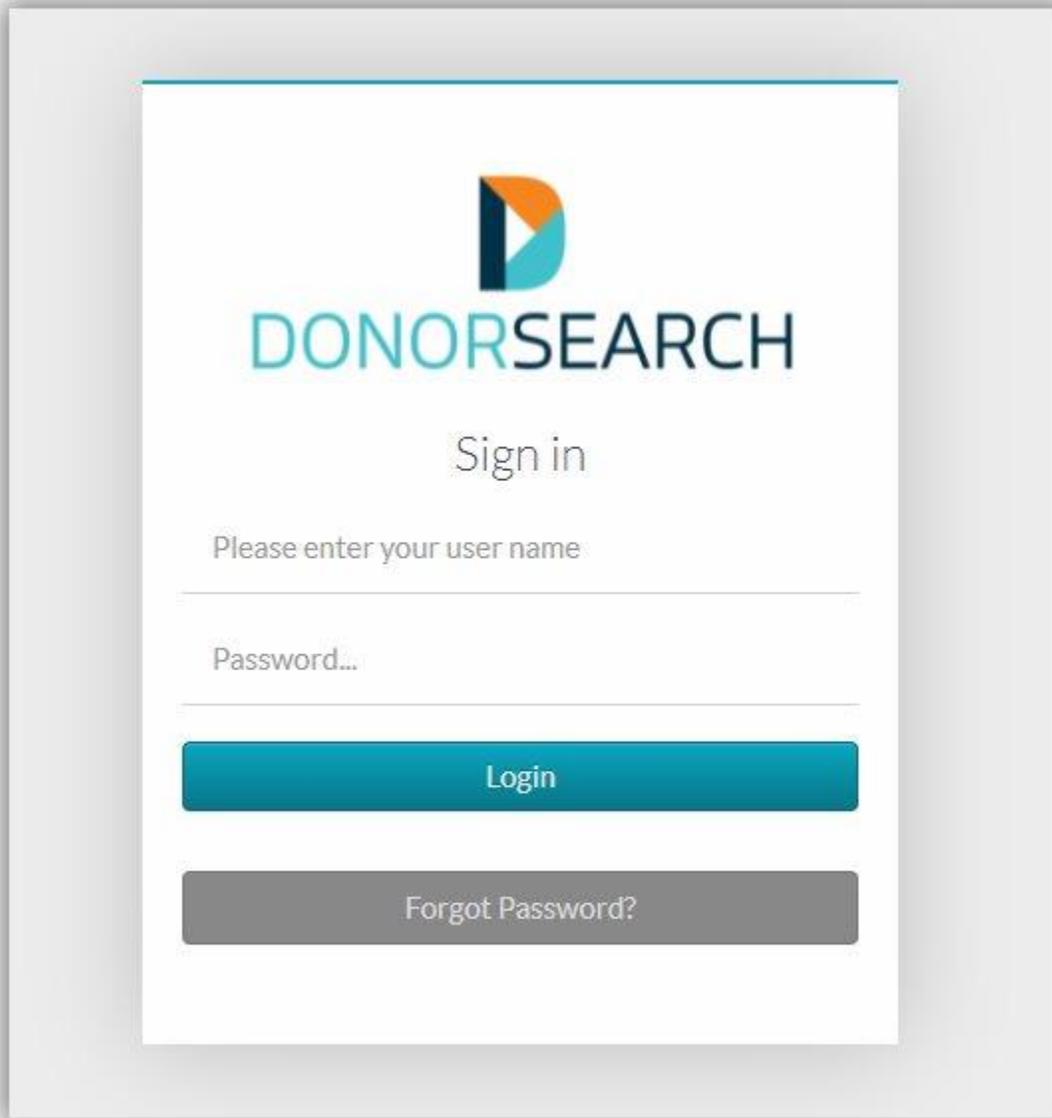
<https://www.donorsearch.net/our-data/>

Outline

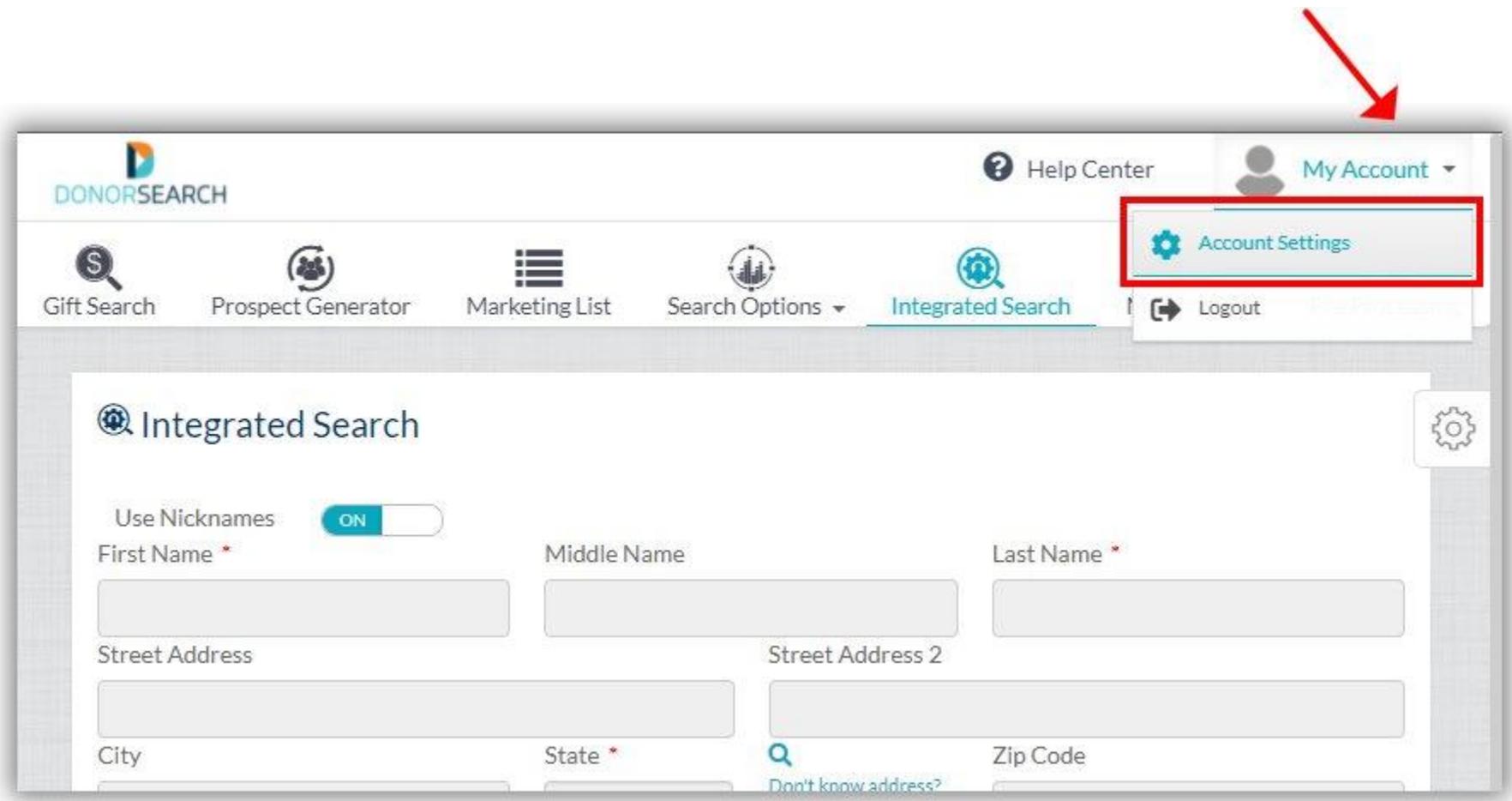
1. Linking your DonorSearch and Trail Blazer Accounts
2. Definitions of DonorSearch Fields and their Meanings
3. Related Resources

#1 – Linking your DonorSearch and Trail Blazer Accounts

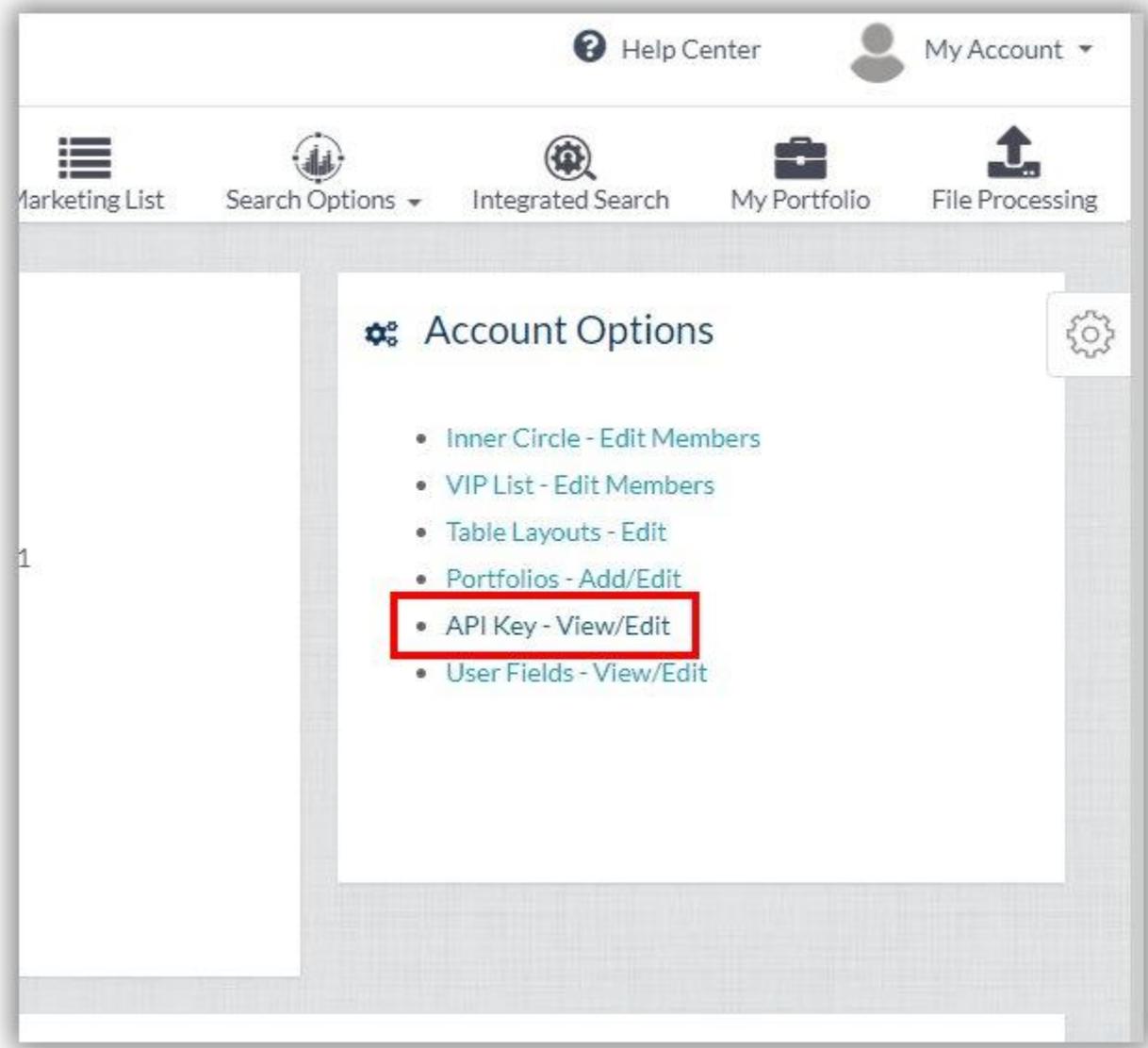
Log into your DonorSearch account: <https://www.donorlead.net/user/login>



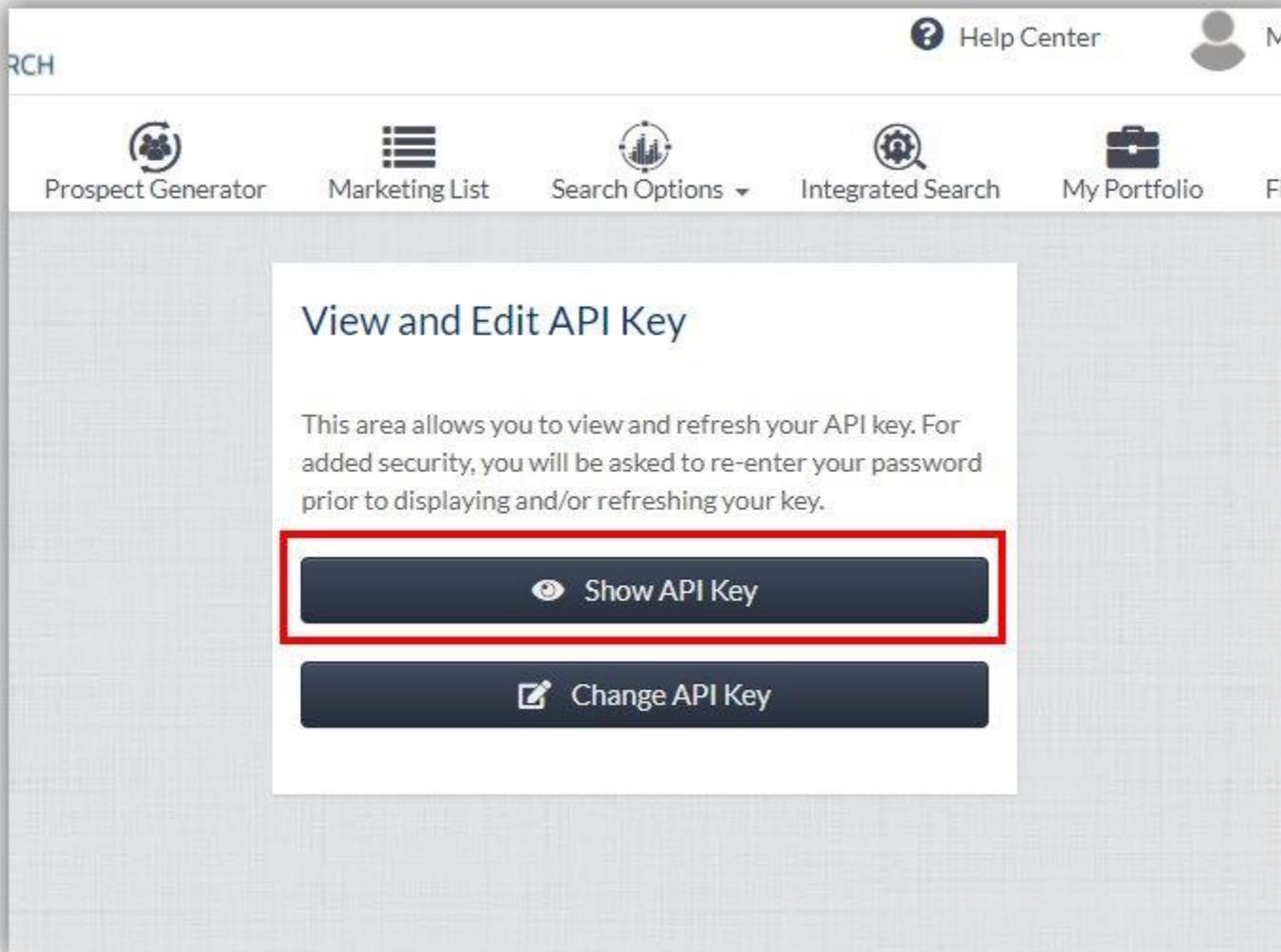
Click the **My Account** drop-down in the upper-right and select **Account Settings**.



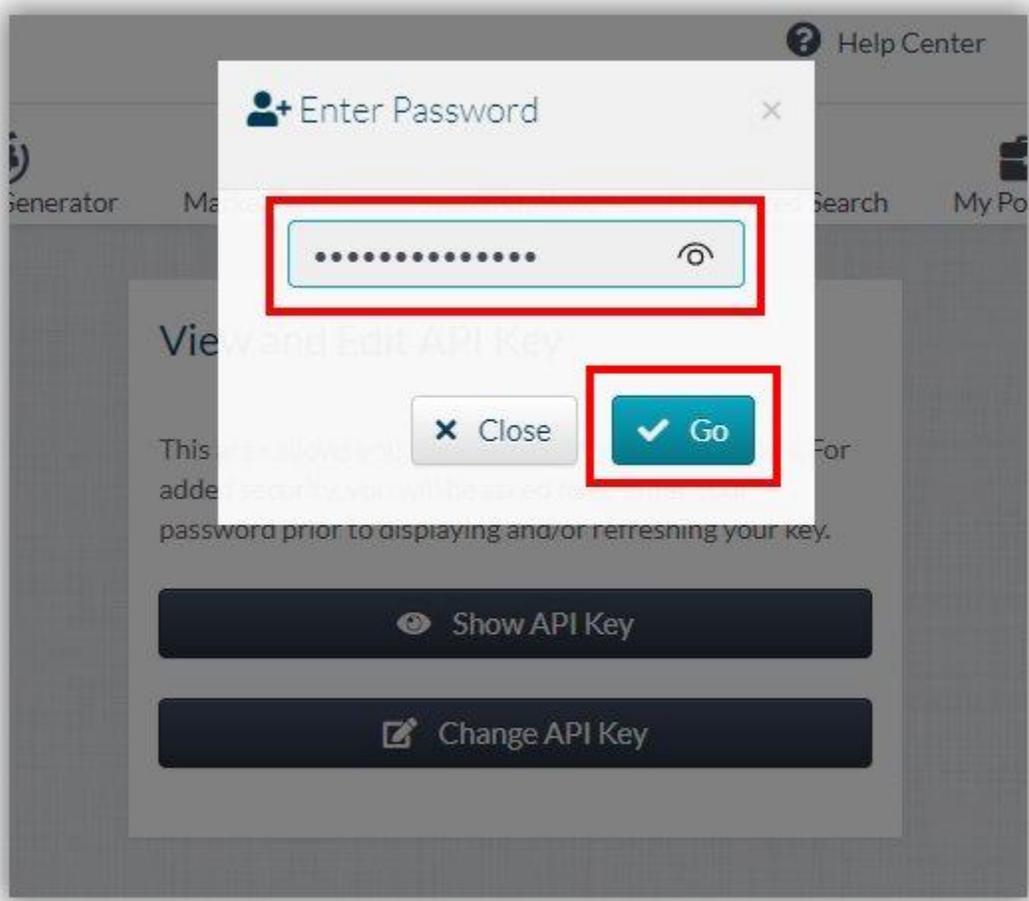
Under **Account Options**, Click the link for **API Key – View/Edit**.



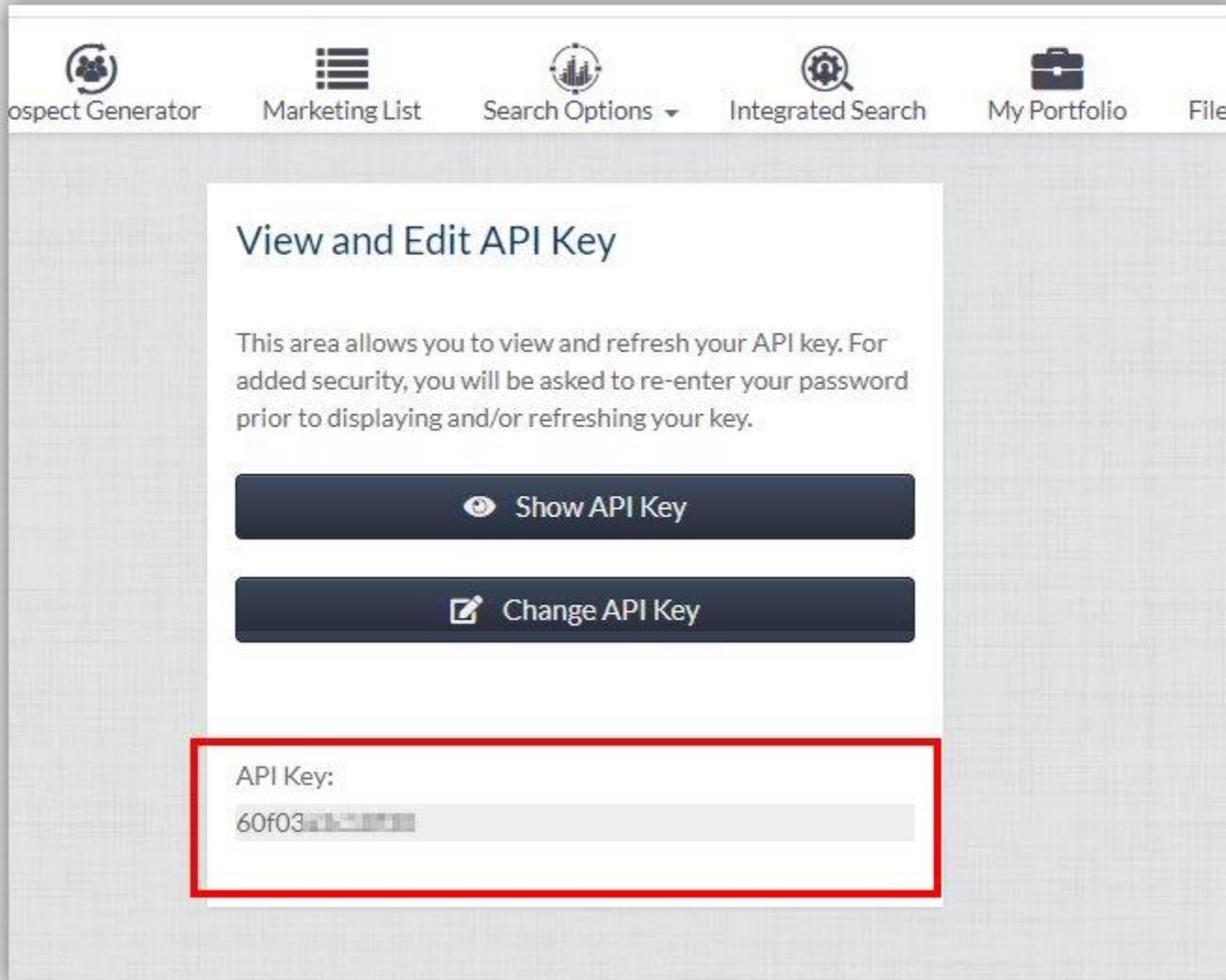
Click the **[Show API Key]** button.



Enter your DonorSearch password and then click **[Go]**.



Copy the API Key into your clipboard.



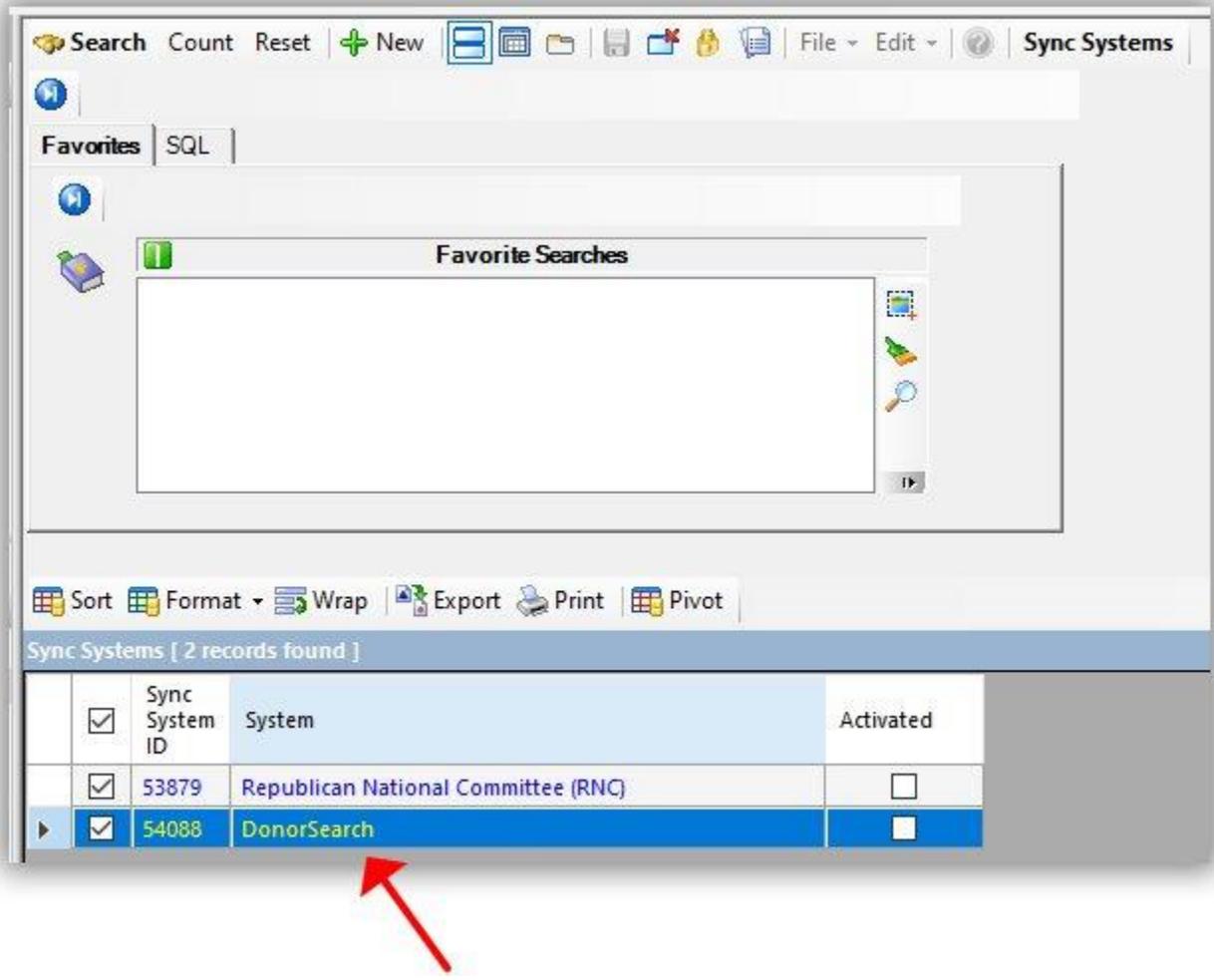
Log into your **Trail Blazer** desktop account.



Navigate to **System Manager > Lists > Sync Systems**. *You need system admin permissions to access this part of the application.*

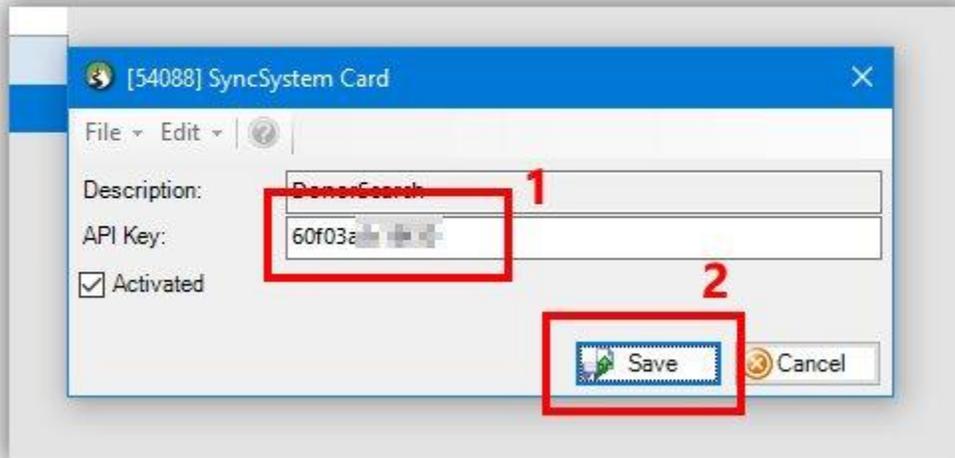


Click on the **DonorSearch** option in the list.

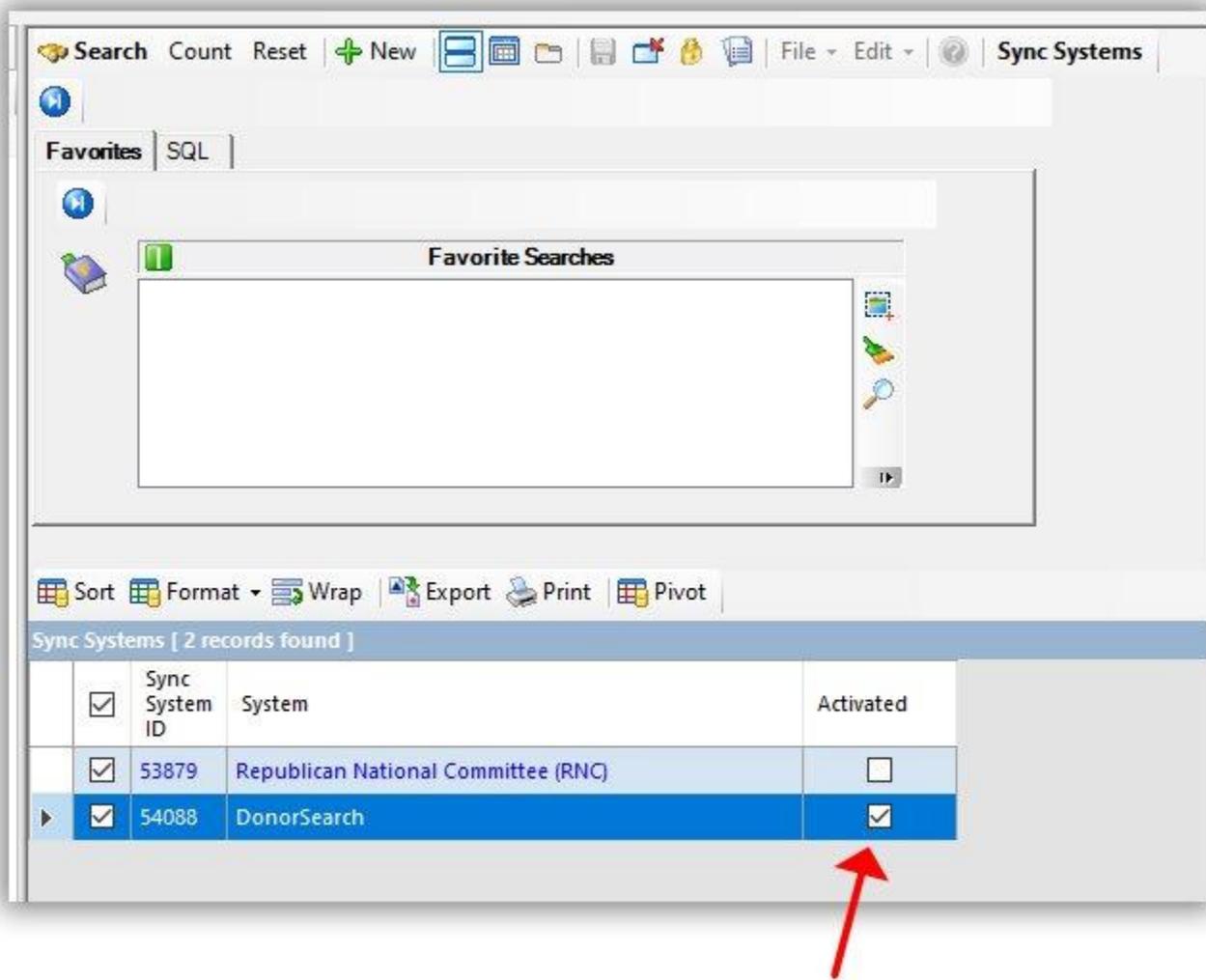


Paste in the DonorSearch API Key and then click **[Save]**. *My example is below.*

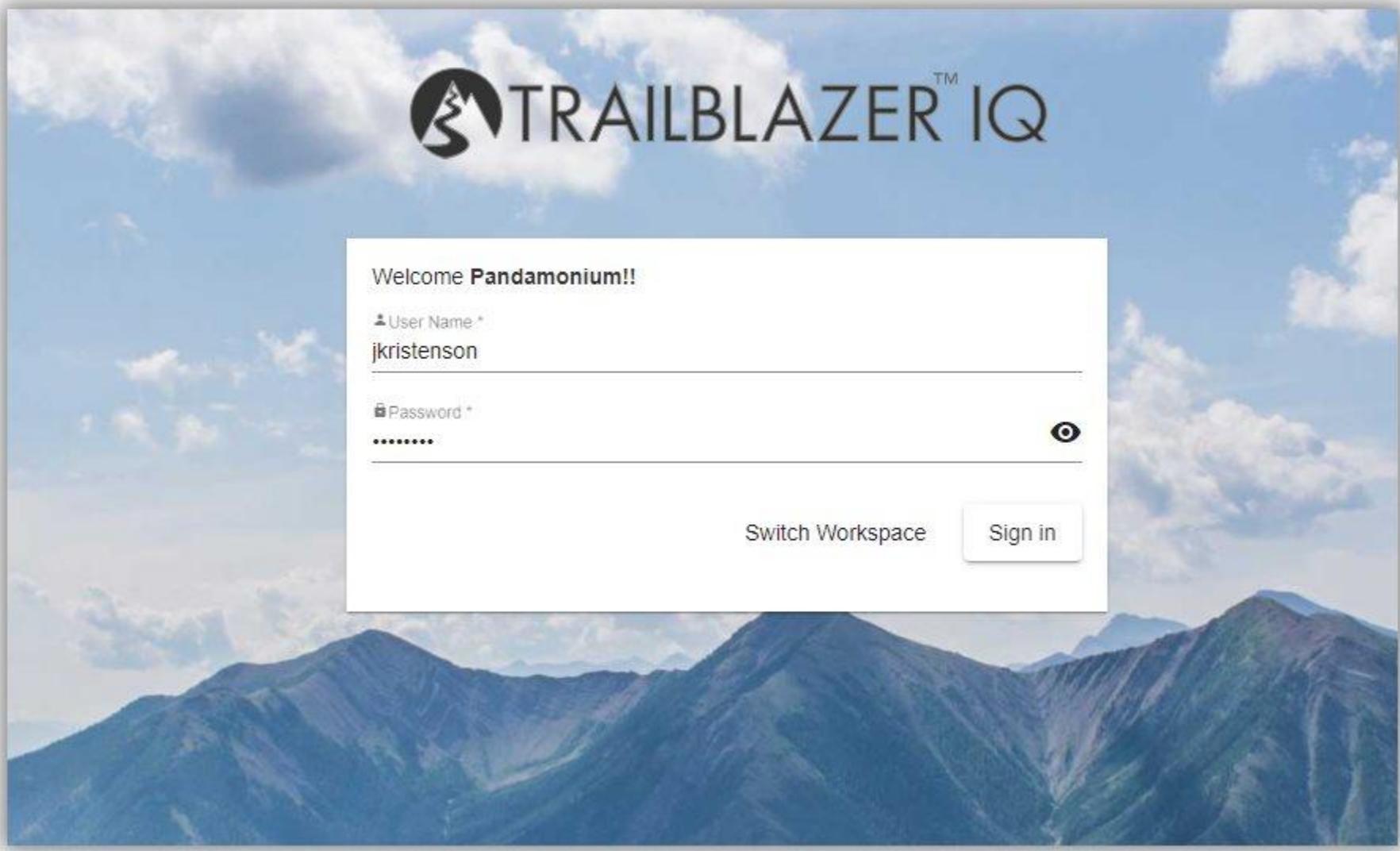
Paste in the API key and click [Save].



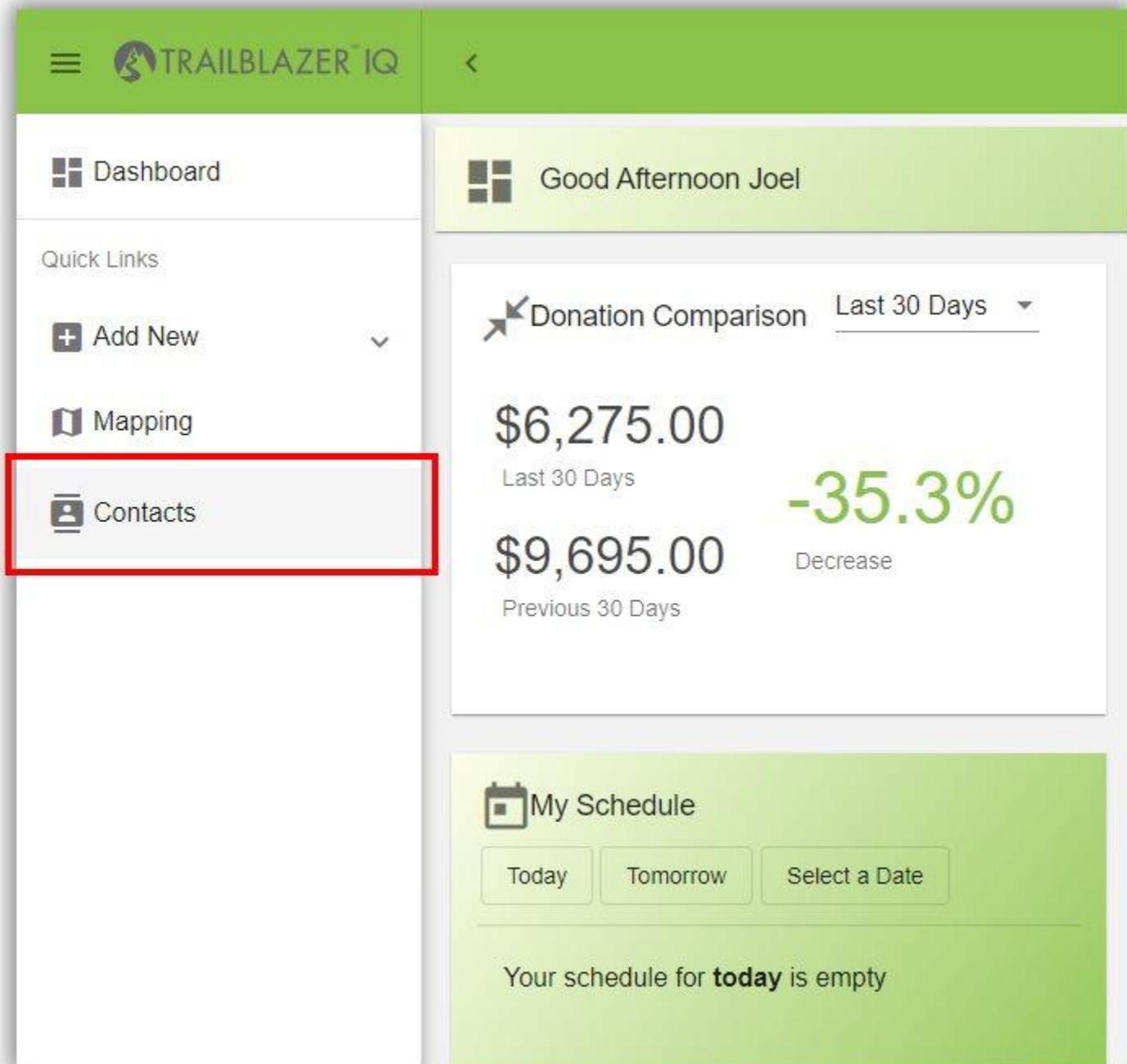
The **Activated** checkbox will display once the setup is complete.



You can now begin wealth screening inside of the **Trail Blazer IQ** web app. To start, [log in](#).

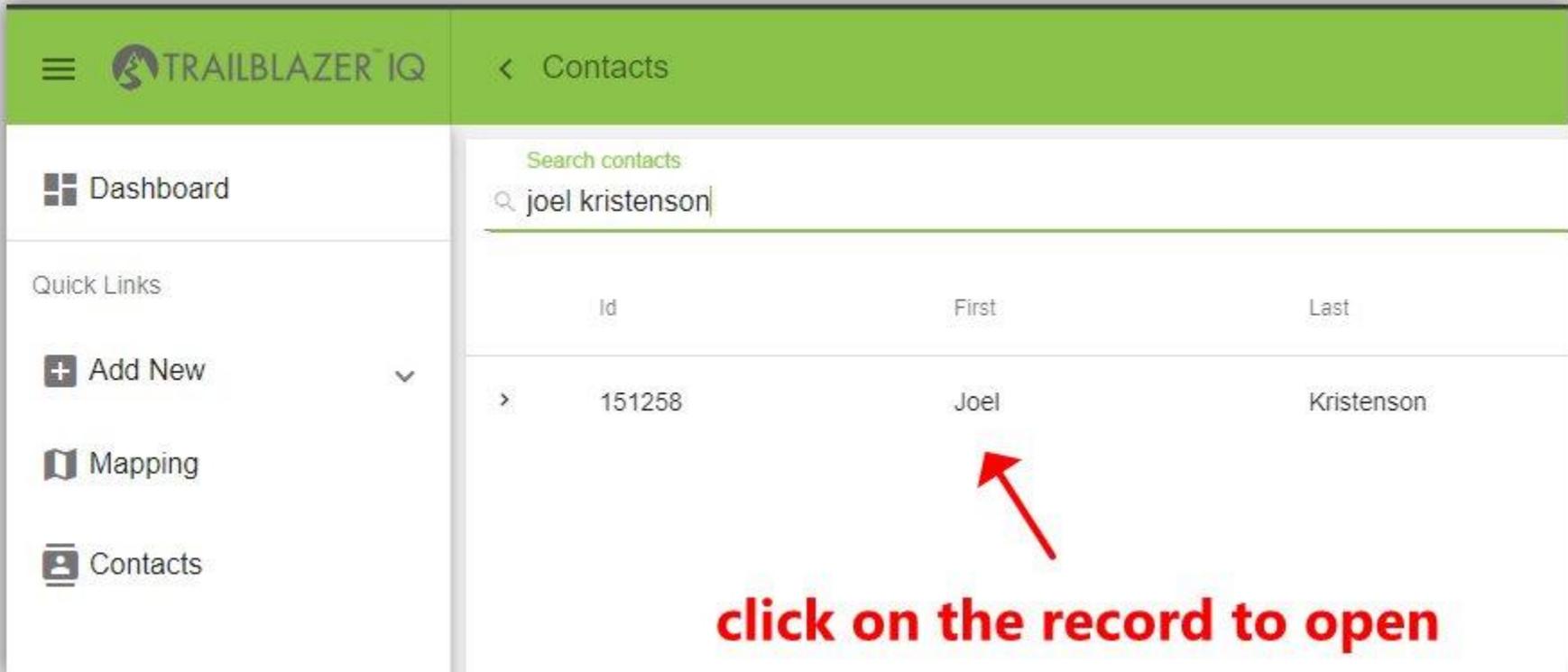


Navigate to **Contacts** to search for the person you want to perform wealth screening on (or add a new record).



The screenshot shows the TrailBlazer IQ dashboard interface. On the left is a navigation menu with the following items: Dashboard, Quick Links, Add New (with a dropdown arrow), Mapping, and Contacts. The 'Contacts' item is highlighted with a red rectangular border. The main content area on the right features a header 'Good Afternoon Joel' and a 'Donation Comparison' widget. This widget shows a decrease of 35.3% from \$9,695.00 (Previous 30 Days) to \$6,275.00 (Last 30 Days). Below this is a 'My Schedule' section with buttons for 'Today', 'Tomorrow', and 'Select a Date', followed by the text 'Your schedule for today is empty'.

In this example I searched for an opened my own record.



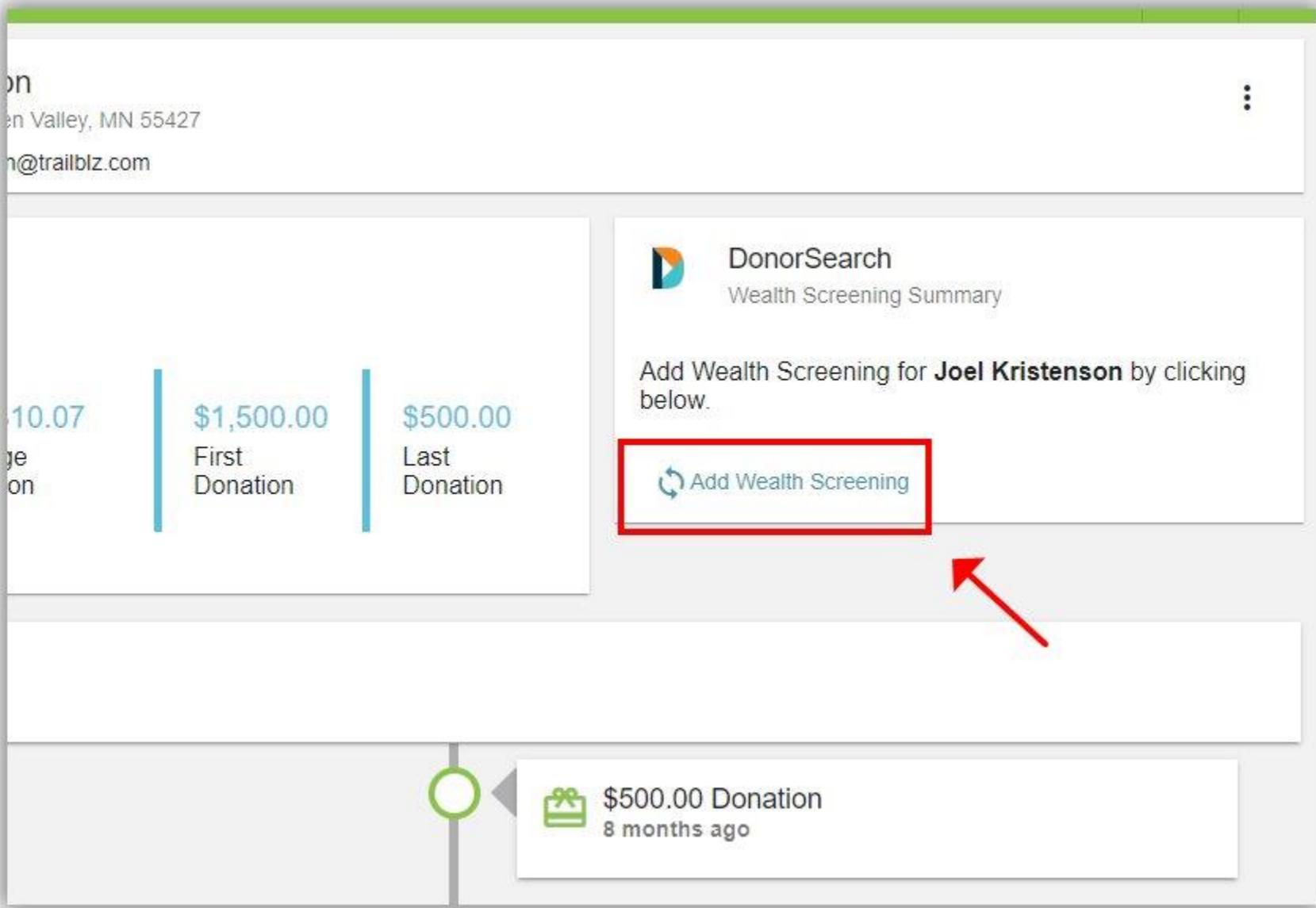
The screenshot shows the TrailBlazer IQ interface. On the left is a navigation menu with 'Dashboard', 'Add New', 'Mapping', and 'Contacts'. The main area is titled 'Contacts' and contains a search bar with 'joel kristenson' entered. Below the search bar is a table with columns 'Id', 'First', and 'Last'. A single record is shown with 'Id' 151258, 'First' Joel, and 'Last' Kristenson. A red arrow points to the name 'Joel' in the table. Below the table, the text 'click on the record to open' is written in red.

Id	First	Last
> 151258	Joel	Kristenson

click on the record to open

Inside of the contact's profile, click on the **Add Wealth Screening** button.

Note: the more complete a profile is, the better the match will be when the data is pulled back from DonorSearch. For instance, having a full name, middle initial, address, spouse, and employer, will be key data points for returning an accurate match.



on
en Valley, MN 55427
n@trailblz.com

10.07 | \$1,500.00 | \$500.00
ge | First Donation | Last Donation
on

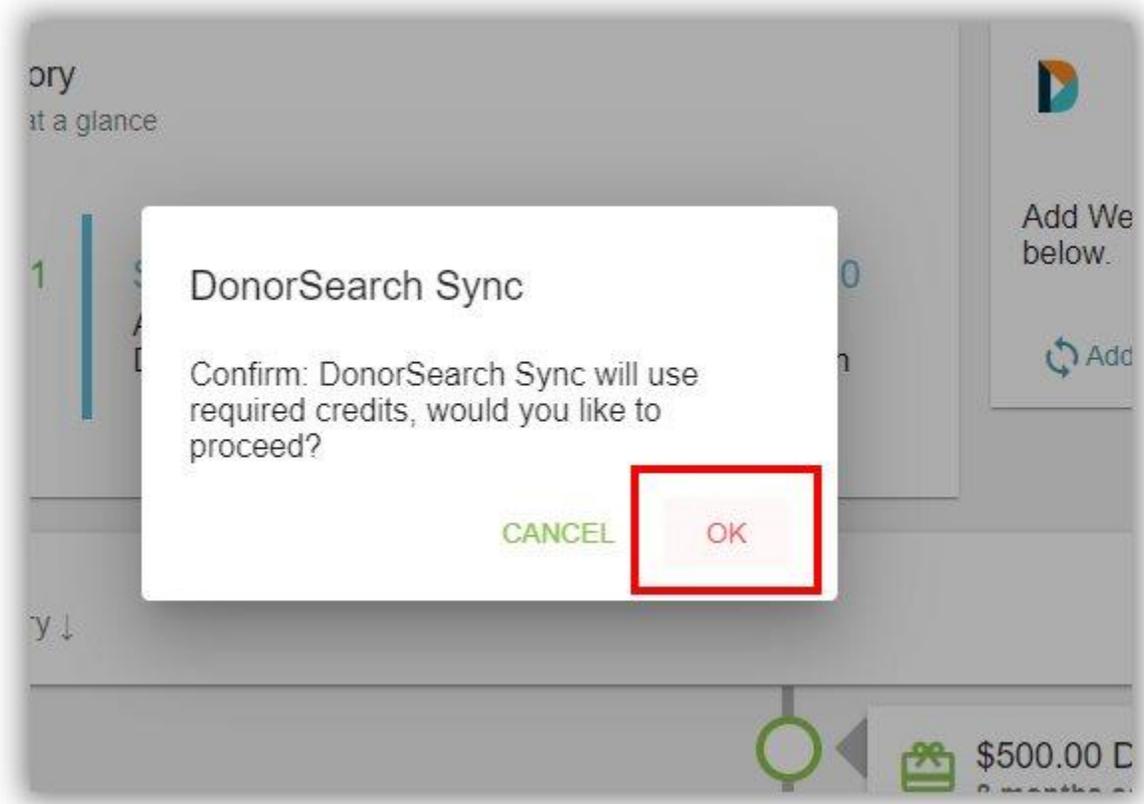
 **DonorSearch**
Wealth Screening Summary

Add Wealth Screening for **Joel Kristenson** by clicking below.

[Add Wealth Screening](#)

 \$500.00 Donation
8 months ago

Click **[OK]** once prompted. This will run the DonorSearch sync process.



You'll receive a prompt at the bottom of the screen when the DonorSearch lookup is complete. The data available from DonorSearch will now display on the screen. My *example* is below.

Example profile after DonorSearch sync is complete.



 **DonorSearch**
Wealth Screening Summary

Annual Fund Likelihood: **62** Average Home Value: **186071** Business Revenues: **0**

Capacity Range Based On Wealth: **\$5,000 - \$9,999** D S Rating: **DS3** Estimated Capacity: **6351**

Major Gift Likelihood: **18** Median Household Income: **63513** New Q S: **0** Pgi D Rating: **7**

Real Estate Est: **0** Sec Insider: **N** States Have Real Estate: **1**

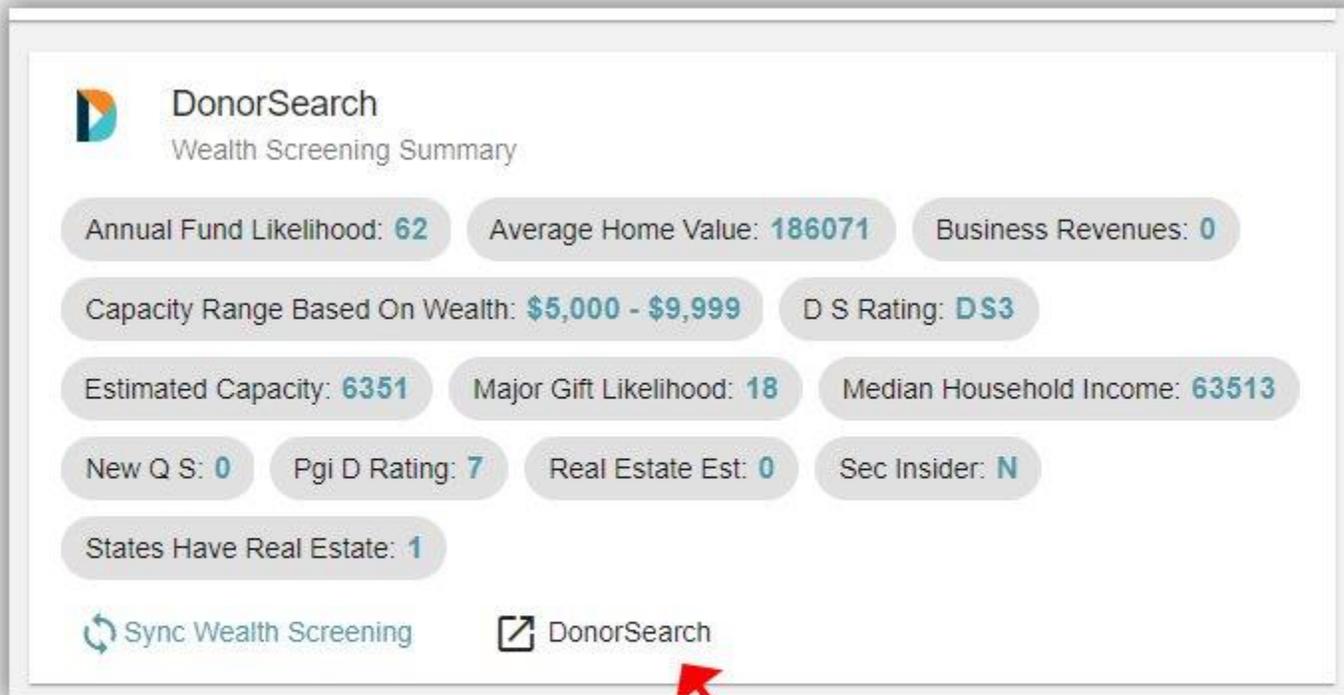
 Sync Wealth Screening  DonorSearch

5.00
Donation

 **DonorSearch**
20 seconds ago
Wealth screening synced.

Note: Section #2 of this article provides definitions for the different data points that DonorSearch provides when syncing.

You also have the ability to click on the **DonorSearch** hyperlink in order to open the full profile in a new tab. This will allow you to view all of the information DonorSearch provides on the matched record.



The screenshot shows a 'DonorSearch Wealth Screening Summary' interface. It features a header with the DonorSearch logo and title. Below the header, there are several data points presented in rounded rectangular buttons: Annual Fund Likelihood: 62, Average Home Value: 186071, Business Revenues: 0, Capacity Range Based On Wealth: \$5,000 - \$9,999, D S Rating: DS3, Estimated Capacity: 6351, Major Gift Likelihood: 18, Median Household Income: 63513, New Q S: 0, Pgi D Rating: 7, Real Estate Est: 0, Sec Insider: N, and States Have Real Estate: 1. At the bottom of the summary, there are two buttons: 'Sync Wealth Screening' with a refresh icon and 'DonorSearch' with an external link icon. A red arrow points to the 'DonorSearch' button.

Open the full profile record in DonorSearch.

You'll need to be **logged into DonorSearch** to complete this process. My *example* is below.

← → ↻ 🏠 🔒 https://www.donorlead.net/ProspectView/Profile/Profile.... ☆ ⌵ 🗄 InPrivate

Identification Profiles (IDP) ⌵

Joel Kristenson (32) Na

6018 Wentworth Ave
Minneapolis MN 55419

Action ⌵

- Switch to Advanced
- Print View
- Refresh Data
- Goto Top of Page
- Open All Sections
- Close All Sections
- Mark Very High ***
- Mark High **
- Mark Low *
- Get Demographic
- Delete Selected
- Undelete All
- Export Profile
- Hide Action Bar

No data

Target Ask Based on Giving ?	\$0 - \$0
Target Ask Based on Wealth ?	\$5,000 - \$9,999

DS Rating: ?	DS3
Overall High Quality Score: ?	0
Assessed: ?	Not Assessed Edit
Assessment Questions: ?	None Edit
VIP: ?	No
RFM: ?	0
Annual Likelihood: ?	62
Major Gift Likelihood: ?	18

	High Quality	All Possible
Real Estate: ?	\$0	\$273,500
Number Of Properties: ?	0	1
Total Charitable Giving: ?	\$0	\$0
Number Of Charitable Gifts: ?	0	0
FEC Gift Total Amount: ?	\$0	\$0
Number Of FEC Gifts: ?	0	0
SEC Stock: ?	\$0	\$0
SEC Options: ?	\$0	\$0
SEC Compensation: ?	\$0	\$0

[Close All Section](#)

Client Supplied Fields

Charitable Giving

Results Found

0 Results Found

The next section details what the different fields mean that DonorSearch provides.

#2 – Definitions of DonorSearch Fields and their Meanings

Click here to download a PDF of DonorSearch field definitions: [Donor Search Definitions.pdf](#)

This page provides an overview on key DonorSearch Fields, along with descriptions of each: <https://www.donorsearch.net/donorsearch-ratings-system/>

Taken from the PDF above. Below is the **definition of each item** that appears in a contact's Donor Search Wealth Profile

DS Rating: An overall rating for the profile based on the detail found. DS1-1, DS1-2 and DS1-3 are high scores indicating that the individual has above average major gift potential. To see the definitions for all DS Ratings, go to: <https://www.donorsearch.net/donorsearch-ratings-system/>

Quality Score: This is a subjective assessment of the report accuracy. Two quality scores are calculated, one for matches based on wealth and another for matches based on giving. A good quality score is 18.0 or higher and is strong evidence that the content is the person who was searched. A low quality score at or below 17.0 is an alert for the user that the profile content requires closer scrutiny.

Estimated Capacity: An estimated 10% of the individual's net worth. If an individual fully commits to an organization, the thought is the individual will donate 10% of their assets over a 3 to 5 year period. This is an estimated 10% of their net worth based on the wealth information found.

Range of Largest Gift Elsewhere: Upper limit/range of amount of largest gift ever given (from all collected data).

Estimated Real Estate: The dollar total is the sum of all properties currently owned/found. Contains market and assessed value.

990PF Flag: Search against all of the 990PF documents, Lists the private foundation names that are the same as an input name.

Aggregate Charitable Giving: Sum total of all charitable giving found for the contact searched **MINUS POLITICAL GIVING**.

Number of Charitable Gifts: This is the count of the number of Charitable Giving gifts totaled in the Aggregate Charitable giving field for the contact.

Aggregate Political Giving: This is the sum of the lower gift for all political gifts found for the contact. Data is pulled from SEC filings. Contains all federal and state political giving; may contain some municipal political giving, depending on size of municipality.

This amount is the sum total of the REP Giving, DEM Giving, and Other Political Giving categories.

Number of Political Gifts: This is the count of the political gifts totaled in the Aggregate Political Giving field found for the contact.

Flag for SEC Insider: Flag for individuals that own a minimum of 5% of a publicly traded company, or are policymakers (C-level, board members, etc.) have a regulatory obligation to publicly report their stockholdings in companies where they have that position.

SEC Insider Holding: Current holdings for individuals that own a minimum of 5% of a publicly traded company, or are policymakers (C-level, board members, etc.) have a regulatory obligation to publicly report their stockholdings in companies where they have that position. SEC stock or insider.

Average HH Income: Average household income from most recent Census (2010).

Plane Ownership Flag: Flag for anyone who is a probable or exact match to owning an airplane registered with the FAA (all planes must be registered).

Number of Gifts in Higher Education: Number of gifts to Higher Education institutions totaled below (defined as organizations/institutions classified as a Higher Education Institution on form 990).

Higher Education Total: Number of gifts to Higher Education institutions totaled below (defined as organizations/institutions classified as a Higher Education Institution on form 990).

Number of Education Gifts: Number of gifts to K-12 educational institutions, literacy organizations, Head Start, and similar types of organizations.

Aggregate Education Giving: Total dollar amount of giving to educational institutions as defined above.

Number of Philanthropy and Grant Gifts: Number of gifts to “re-gifting” organizations such as Charitable Foundations/Trusts and United Way.

Aggregate of Philanthropy and Grant Giving: Total dollar amount of giving to philanthropy and grant giving organizations as defined above.

Number of Healthcare Gifts: Number of gifts to healthcare related institutions including hospitals, clinics, birthing centers, hospices, transplant services, Alzheimer’s Association, research organizations, Susan G. Komen Foundation, sex education and family planning services, Planned Parenthood, etc.

Aggregate of Healthcare Giving: Total dollar amount of giving to healthcare organizations as defined above.

Number of Arts Gifts: Number of gifts to arts organizations including art museums, symphonies/orchestras, theaters, and theater groups.

Aggregate of Arts Giving: Total dollar amount of giving to arts organizations as defined above.

Number of REP Gifts: Number of political giving gifts to Republican political candidates.

Aggregate of REP Giving: Total dollar amount of giving to Republican political candidates.

Number of DEM Gifts: Number of political giving gifts to Democratic political candidates.

Aggregate of DEM Giving: Total dollar amount of giving to Democratic political candidates.

Number of Other Political Gifts: Number of political giving gifts to third-party political candidates and to PACs.

Aggregate of Other Political Giving: Total dollar amount of giving to third-party political candidates and to PACs.

Number of Society Benefit Gifts: Number of gifts to “society benefit” gifts, which is an amalgam of all other charitable gifts not listed above, including human service organizations, youth development, and food banks.

Aggregate of Society Benefit Giving: Total dollar amount of giving to society benefit organizations as defined above.

Number of Gifts for Religion: Number of gifts to religious institutions including churches and religious organizations such as Catholic Charities and The Jewish Federation.

Aggregate Giving for Religion: Total dollar amount of giving to religious organizations as defined above.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Additional Services](#)

3rd Party Resource: [DonorSearch Field Definitions.pdf](#)

3rd Party Resource: [DonorSearch Data \(an overview\)](#)

3rd Party Resource: <https://https://www.donorsearch.net/donorsearch-ratings-system/>

3rd Party Resource: [Donor Search Fields](#)

Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** support@trailblz.com

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. You can sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive training classes.*

** This service is included in your contract.*