WEALTHENGINE
An Altrata company

ALTRATA

WE Insights for Salesforce Userguide

Version 2.3 February - 2023

WEALTHENGINE™
An Altrata company

ALTRATA

WE_Insights for Salesforce package can be installed from the link provided in the installation guide. The product that enables Leads, Contacts and Person Accounts stored in Salesforce to be analyzed and scored using the WealthEngine Platform. This document is intended for users of Salesforce to understand how to use the WE_Insights for Salesforce app.

- **Table of Contents**

1. Introduction to WE Insights for Salesforce

WE Salesforce Connector establishes a powerful link between our WealthEngine Platform and Salesforce, providing you valuable and easy access to comprehensive wealth insight. Salesforce users get direct accessto more than 50 WE data elements and proprietary wealth scores and ratings. With WE Salesforce Connector you have what you need to take your marketing, business development or fundraising efforts tothe next level with new insight and productivity.

Powerful Capabilities

- **OneClick**: Add wealth intelligence to exiting lead, contact or person account records with click of abutton
- **Bulk Append**: Not only get wealth data on a single lead, contact or person account but also on an entire list with a click of a button from within Salesforce
- **Reporting**: Easily report on wealth data and your data using standard SF reporting and analytics tools
- **Prospecting**: Direct integration with WE's prospecting tool, WE Prospect
- **Search**: The ability to send new leads directly to Salesforce from WE Search
- **Auto-Append**: Option to automatically append the wealth data upon insertion of new record
- **Report Screening**: Automatically screen from any reports that exists within the Salesforce one-time or ona scheduled basis
- **List View Screening:** End-users can screen single or multiple records from Salesforce Contact and Lead Listviews, without going into a record.
- **Available Credits**: Visibility of remaining credit amount within the Salesforce app for

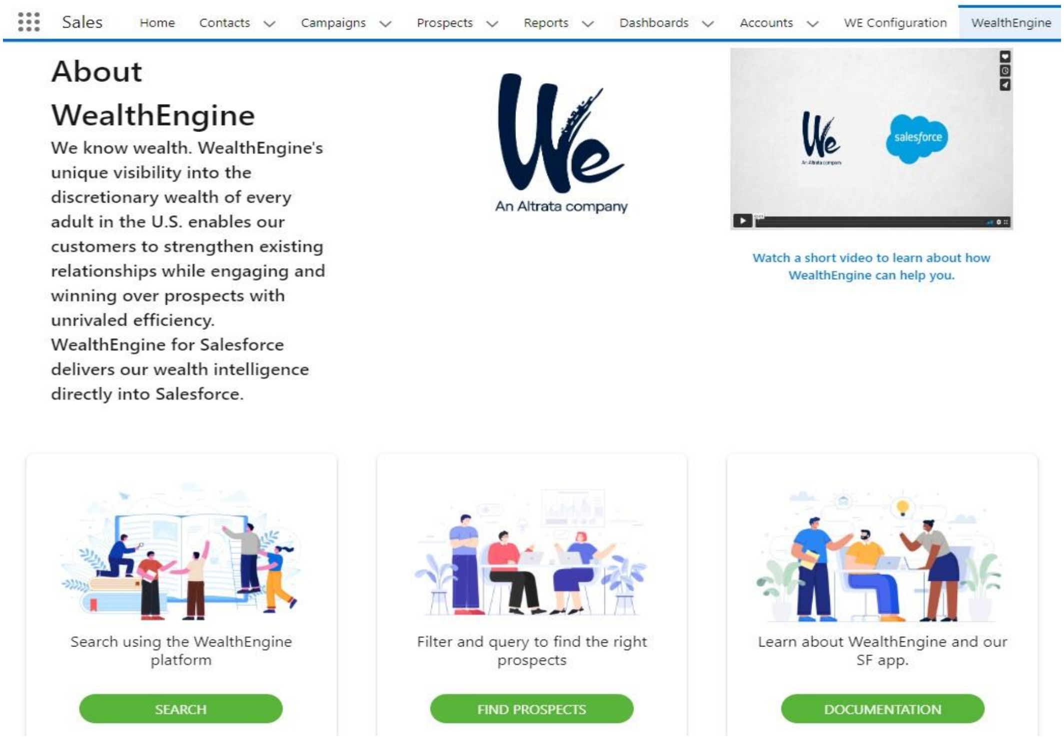
Admins

- **Customizable**:

a) Ability to customize viewable fields and page layout per your needs

b) Choose which fields are used for searching against WealthEngine

c) User based permissions and usage metrics



2. Add Wealth Data for Individual Records

Score and Rate Contacts/Leads/Person Accounts

To pull in WealthEngine scores and ratings, click on the **Get Current Results** or **Get Wealth Info button**. Clicking this button will pass name and address information to WealthEngine for analysis. The person's information will be analyzed, and the results will be returned and displayed in the WealthEngine section or the Results related list, depending upon your configuration.

WealthEngine

WEScoreAndRateForContact

Get Current Results | Research Details

	Created Date	P2G Score	P2G Description	Wealth Score	Gift Capacity Range	Est. Annual Donations	Net Worth	Total Assets	Cash on Hand	Age

Usage Note: When you click the Get Current Results button, the button will be greyed out to indicate the query is in progress. The query can take anywhere from a few seconds to a minute. Please be patient. The performance will vary based on the network connections and the volume of information available on the individual. Individuals with a lot of data matches will take longer to analyze and return the results.

Once the analysis is completed, WealthEngine will return the results and they will be displayed as below.

WealthEngine

WEScoreAndRateForContact

Get Current Results | Research Details

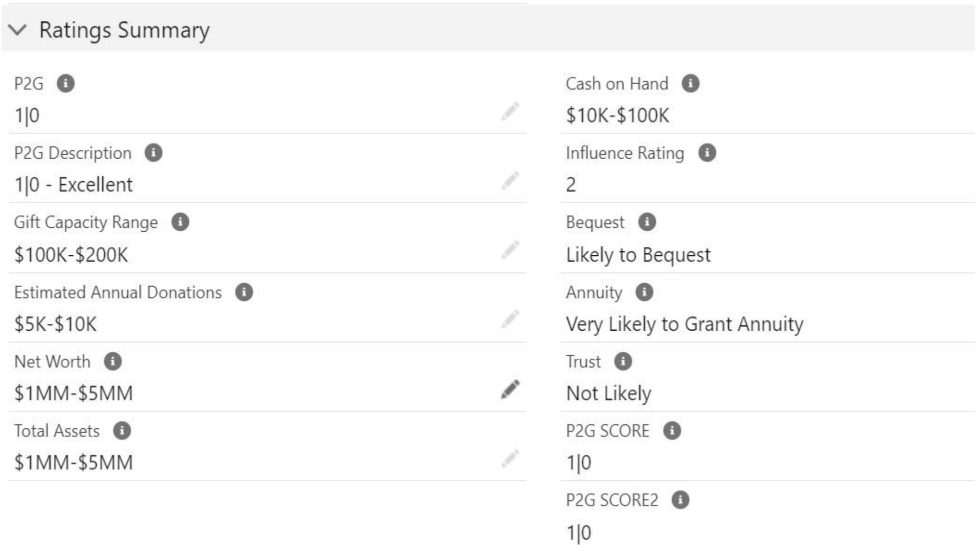
	Created Date	P2G Score	P2G Description	Wealth Score	Gift Capacity Range	Est. Annual Donations	Net Worth	Total Assets	Cash on Hand	Age
View | Del	10/11/2022	1|0	1|0 - Excellent	95	$100K-$200K	$5K-$10K	$1MM-$5MM	$1MM-$5MM	$10K-$100K	73

View Record's Full WE Scores and Ratings–Result Detail Page

Get Current Results | Research Details

	Created Date	P2G Score	P2G Description	Wealth Score
View | Del	10/11/2022	1|0	1|0 - Excellent	95

To view the details of the scores and ratings, click on the **View** button on the far left of the record to drilldown into the details. The resulting page is called the Result Detail



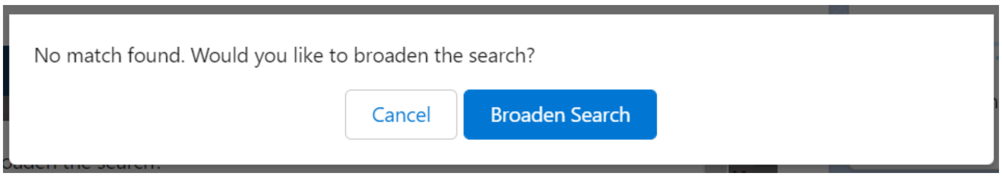
To learn more about the definitions of WealthEngine ratings and scores pulled into Salesforce, please see our [Ratings and Scores] guide.

View Research Details

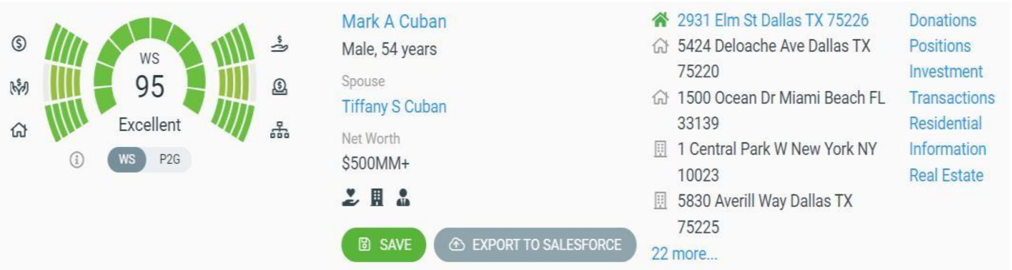
Using the **Research Details** button, you can bring up a new browser window containing a WE Platform session. The WE Platform result window is the same functionality and capabilities you get when you log directly into WealthEngine.com and conduct a search. This will perform a search as of today and take you directly to the WE profile.
Broaden Search

Broaden Search

When you attempt to get wealth data on a record in Salesforce, sometimes the record will be unmatched due to insufficient data or unable to find a match with the data provided. For example, If you do not have a full address or an old address in SF for an individual they may not match to the WE database. In this case, you will receive a pop-up which will give you the option to **Broaden** your search.



To broaden your search, click on the **Broaden Search** button or click on **Cancel** button to exit. When you Broaden Search, a new tab will open in WealthEngine and land you on the search result page. Choose the individual that matches your search and then click on **Export to Salesforce** button to save the WealthEngine results to the original record in Salesforce.



Search in WealthEngine and Export to Salesforce

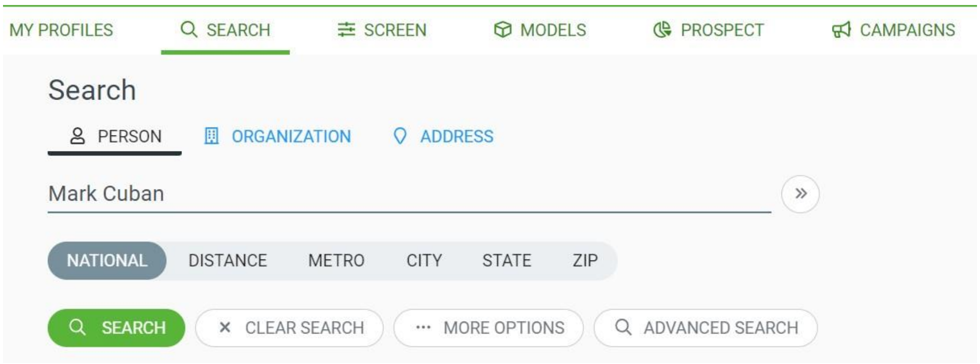
You also have the option to search for a new individual in WealthEngine and then add that new prospect as a lead to Salesforce. When you add a lead to Salesforce, it will bring in name, contact information and wealth data.

Since WE offer nationwide searches, so this is a great option if you just met someone and want to learn more about them before adding them to Salesforce.

To perform a new **Search** in WealthEngine, navigate to the **WealthEngine** tab in Salesforce and click the **Search** button.

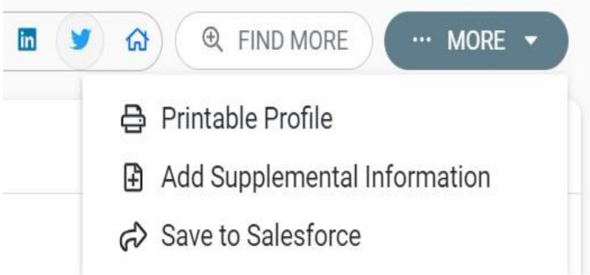
Note: We suggest you to go through our **WE Prospect List best practices** article

Clicking this button will launch the **WealthEngine Search** in a new tab. Perform your search using whatever identifying information you have (name, address, demographics etc.)



Select your individual from the search result page which will take you to the WE profile. On the right, byclicking on **MORE** button you will have the option **Save to Salesforce**.

This will save the name, contact and wealth data directly to Salesforce as a lead with the Lead Source ofWE.

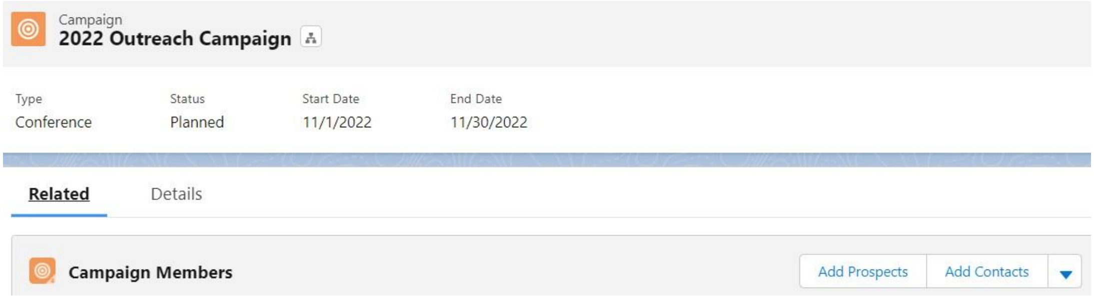


This will save the name, contact and wealth data directly to Salesforce as a lead with the Lead Source of WE.

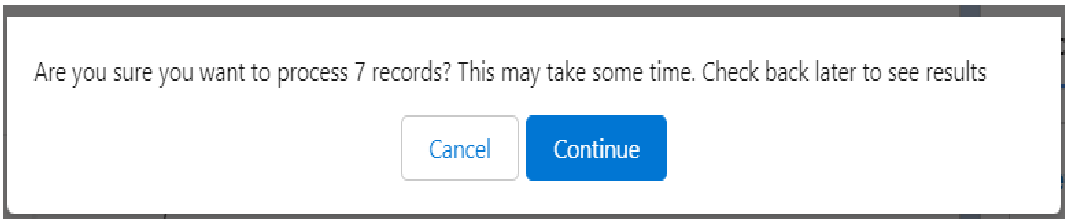
3. Add Wealth Data for a List of Records –Screening

The WE Connector for Salesforce app allows you to send a list of records to WealthEngine to append wealth data with a click of a button. This uses the Salesforce object **Campaign** which allows you to group records. This functionality requires Data Services -Screening credits purchased with WealthEngine.

Navigate to the Campaign object in Salesforce and create a new campaign. Add members to the campaign untilyou get your list complete. This service can handle up to 50,000 records per list. If you would like to do more records, you will need to create separate campaigns. Once ready, send that list to WealthEngine for bulk append by click on the **Get Wealth Info** button.



Click on **Continue** on the pop-up to confirm if you would like to send the list to WealthEngine.8

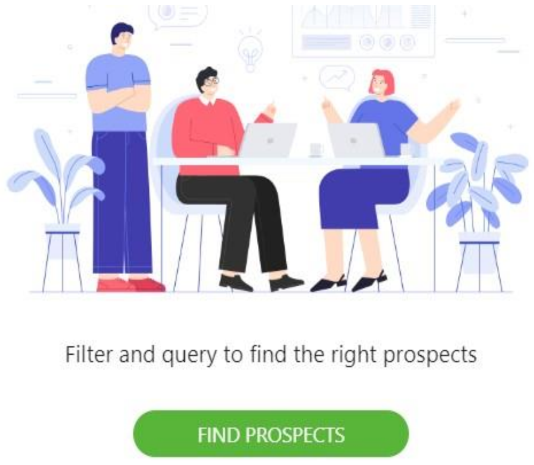


Upon receiving the list, WealthEngine will process it, and once it has been processed, you will receive a confirmation email from WealthEngine, and your results will be available in both WE & Salesforce.
The Records sent to WE will have WE scores & ratings appended to them, and in WE the results are available under
My Profiles>API list.

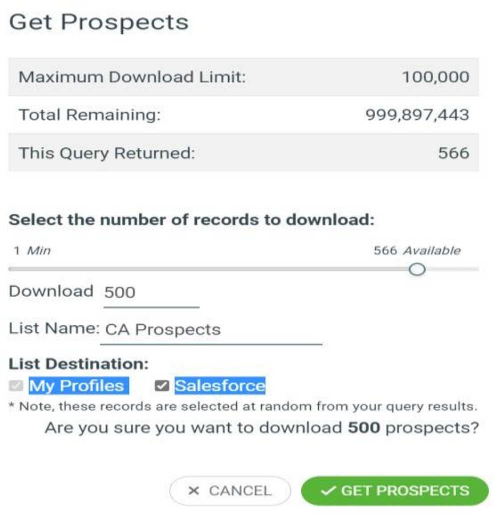
4. Finding New Prospects with WE Insights for Salesforce

WE Prospect offers a simple way to find, understand and contact wealthy prospects with a high chance of conversion –all based on wealth and affinity. With the WE Insights for Salesforce app you can easily access the WE Prospect tool and push new leads straight to Salesforce. This feature requires **WE Prospect credits** purchased with WealthEngine.

To open the **WE Prospect** tool, navigate to the WealthEngine tab in Salesforce and click on Find Prospects. If this is your first time using, WE Prospect, we suggest you go through our **WE Prospect List best practices** article



Apply query to pull your perfect prospect list and on the final Get Prospects page, you will have the option to send your **list to Salesforce** as well as **WE's My Profiles** section using a checkbox.



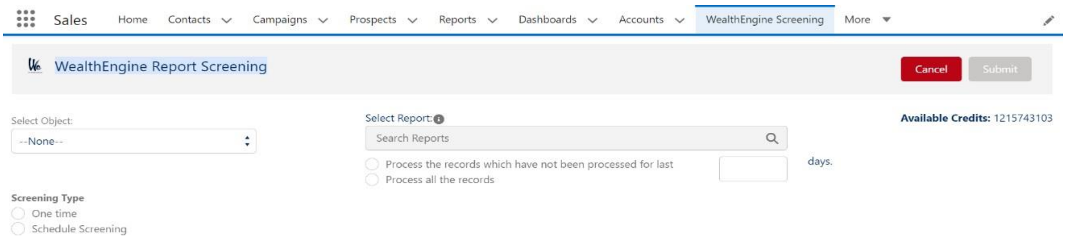
All the individuals from the list will now load in Salesforce as new **Leads** with name, contact and wealth data, as well as the WE Prospect List Name and a Lead Source of, WE.

5. Report Screening

Using this feature, you can automatically screen any Salesforce reports one-time or on a scheduled basis. One-off or Scheduled screening of reports hourly/daily/weekly/monthly. In addition, it enables automated screening of Contacts/Leads that meet the filter criteria.

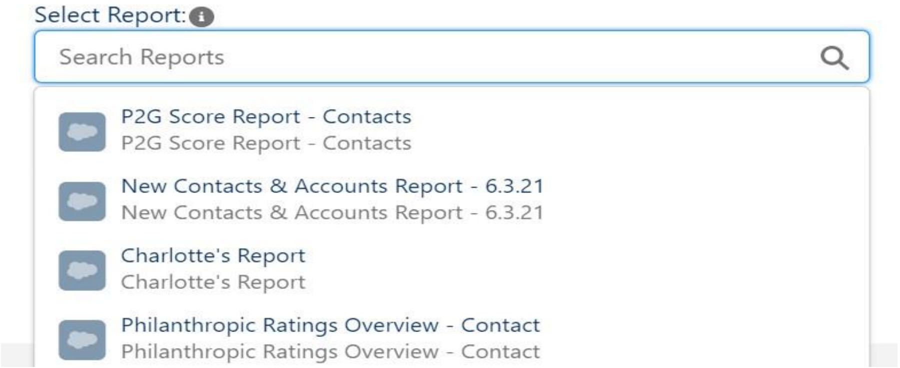
This feature requires WE Screening credits purchased with WealthEngine. To open the Report Screening tool, navigate to the **WealthEngine Screening** tab in Salesforce.

Note: This feature should be set up by SF Admin, and it's suggested to move Reports right under Campaign as they share the same purpose.

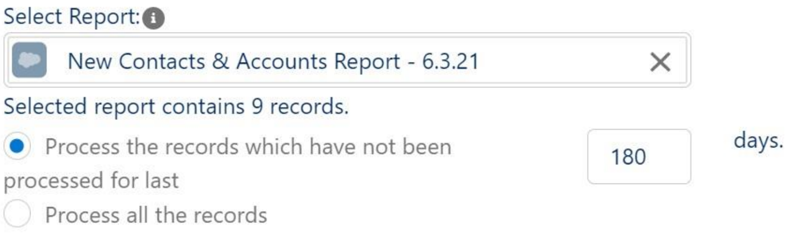


Step 1: Select the Object - Lead/Contact

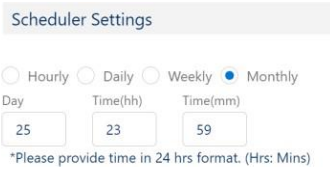
Step 2: Select the prepopulated Report you would like to Screen



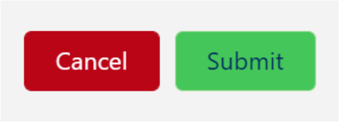
Step 3: Apply the filter/rules to process the records which have not been screened in last 180 days or all the records



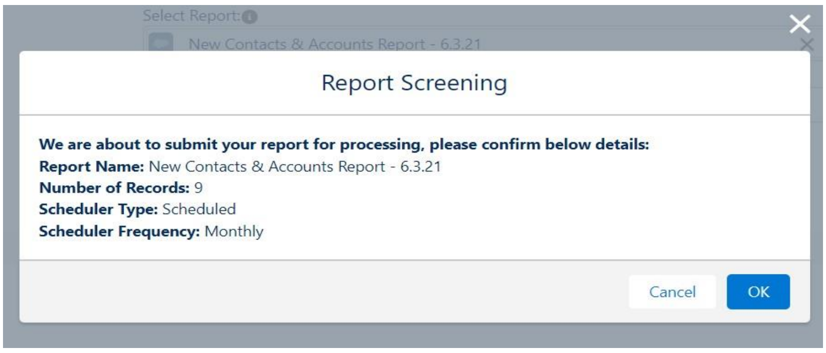
Step 4: Choose the type of screening you want, whether it's a one-time or scheduled screening



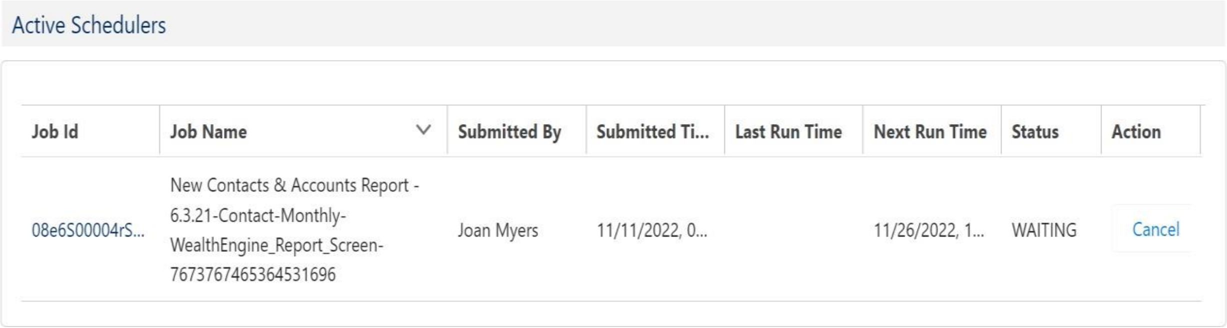
Step 5: Submit



Note: The available credits limit indicates how many credits are available for an account



Click on OK to submit the report for processing


Active Schedulers

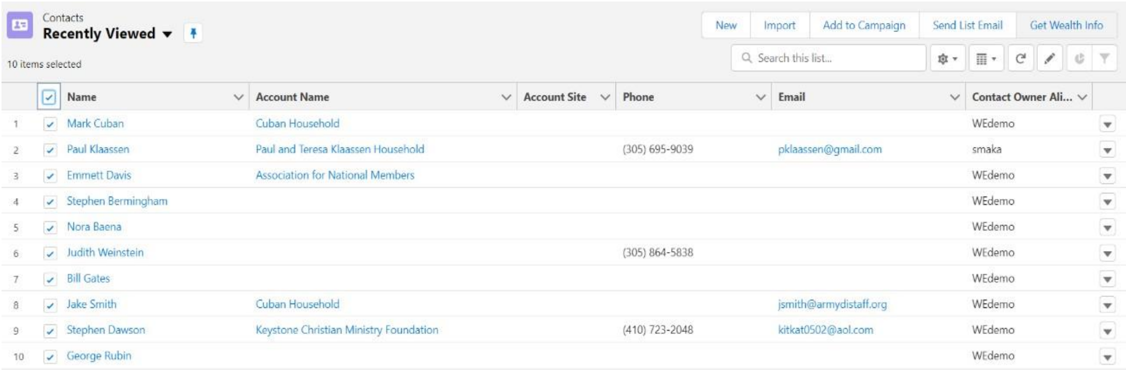
Job Id	Job Name	Submitted By	Submitted Ti...	Last Run Time	Next Run Time	Status	Action
08e6S00004rS...	New Contacts & Accounts Report - 6.3.21-Contact-Monthly-WealthEngine_Report_Screen-7673767465364531696	Joan Myers	11/11/2022, 0...		11/26/2022, 1...	WAITING	Cancel

Under Active Schedulers, you should be able to see the status of the job

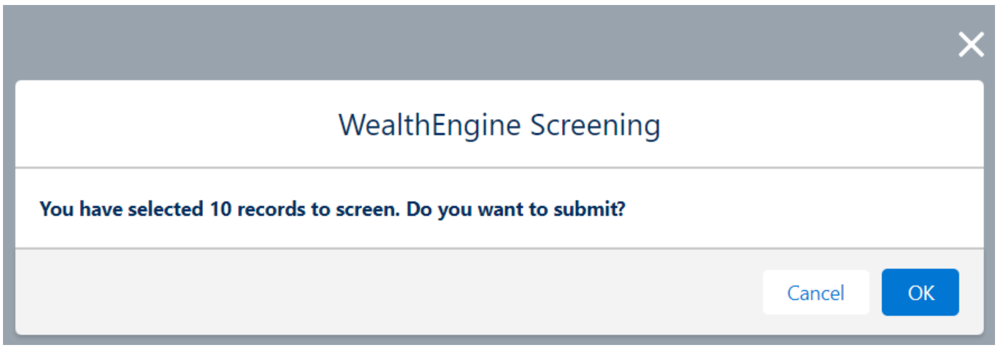
6. List View Screening

This feature allows us to screen standard or customized lists of **Leads**, **Contacts**, and **Person's account** objects.

The end-user can screen single or multiple records from Salesforce Contact and Lead List views, without going into a record. Users can select multiple (up to 200 at a time) records to screen with one click.


Contacts
Recently Viewed
10 items selected
New | Import | Add to Campaign | Send List Email | Get Wealth Info
Search this list...

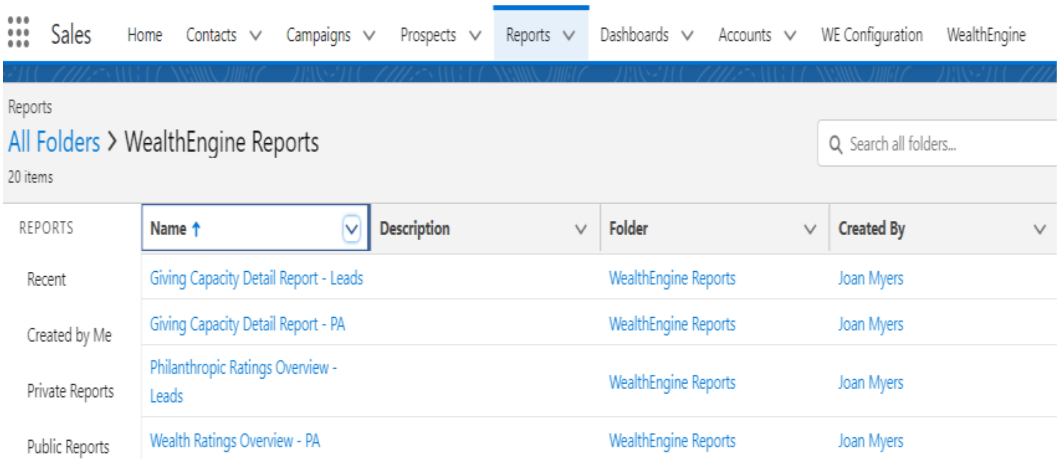
	Name	Account Name	Account Site	Phone	Email	Contact Owner Ali...
1	Mark Cuban	Cuban Household				WEdemo
2	Paul Klaassen	Paul and Teresa Klaassen Household		(305) 695-9039	pklaassen@gmail.com	smaka
3	Emmett Davis	Association for National Members				WEdemo
4	Stephen Bermingham					WEdemo
5	Nora Baena					WEdemo
6	Judith Weinstein			(305) 864-5838		WEdemo
7	Bill Gates					WEdemo
8	Jake Smith	Cuban Household			jsmith@armydistaff.org	WEdemo
9	Stephen Dawson	Keystone Christian Ministry Foundation		(410) 723-2048	kitkat0502@aol.com	WEdemo
10	George Rubin					WEdemo



Click on OK to submit the records for Screening

7. WE_Insights for Salesforce Reports

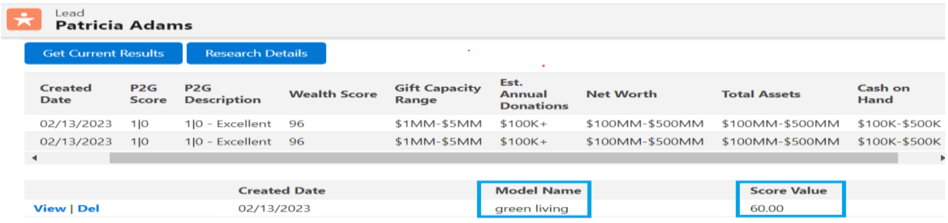
AppExchange application. The reports can be found in the **Reports** tab menu under the name WealthEngine Reports. The reports provided with the WE Insights for Salesforce



The reports are segmented by type of record; Leads, Contacts and Person Accounts. The reports will contain results only on individuals that have been analyzed by WealthEngine. For example, all contacts where you have clicked on the Get Current Results button. The results for each individual will only display the latest results. Thus, If a contact has three WealthEngine entries in the Scores and Ratings panel, only the latest set of scores will be displayed in the report. The WealthEngine supplied reports can be modified just as you would any report in Salesforce. To render any report, click on the Report name. Click on Customize to add or remove WealthEngine Result fields from the report.

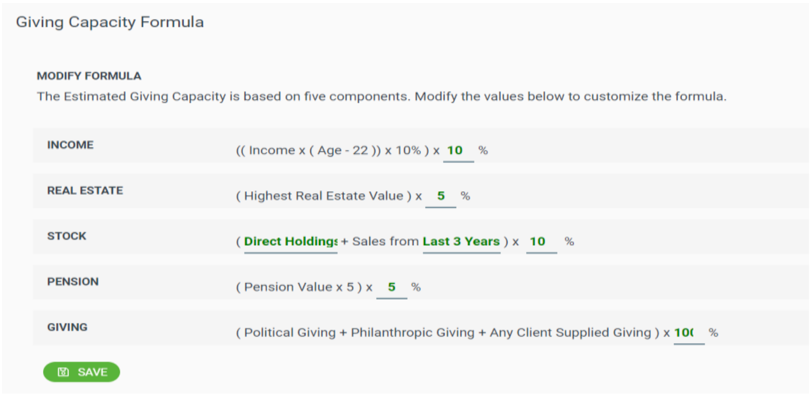
8. Model Screening

The Model Scoring feature helps each organization to score any **L**ead, **C**ontact or **P**erson account against the models built within the WealthEngine platform. Each record can be scored against the **Model**, and the scoring returns a value between 1 and 100, with 1 = least similar, and 100 = most similar.

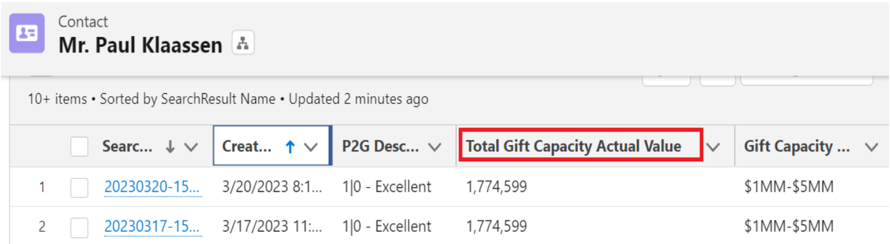


9. Customized EGC scores in Salesforce

The Customized Estimated Giving Capacity scores can now be imported into SF to provide a more targeted report. The Gift Capacity estimates how much your person can afford to give in a five-year period to all the institutions they support, in total. Five major components make up the score and a formula are used for each to determine which information is included and in what amounts.



In WE you can customize the EGC formula and view the scores under the field name **Total Gift Capacity Actual Value** in Salesforce



10. Troubleshooting Document

For more information on troubleshooting, check out our troubleshooting guide