Release Notes: Q1 2019 (January) Release

Before you begin to use Target Analytics *ResearchPoint*, take a moment to review the following notes. It is important to share this information with all *ResearchPoint* users in your organization.

Save Information from Wealth Search

This release introduces the ability to add data taken from a wealth search and add it to a primary record. After running a wealth search, select **+ Add to Constituent** to quickly select which data to add to the prospect record.

You'll be able to save wealth search information from **Real Estate and Business** under **Assets**, **Biographical Information**, **Giving**, **Wealth Indicator**, **Foundation affiliations**, and more.
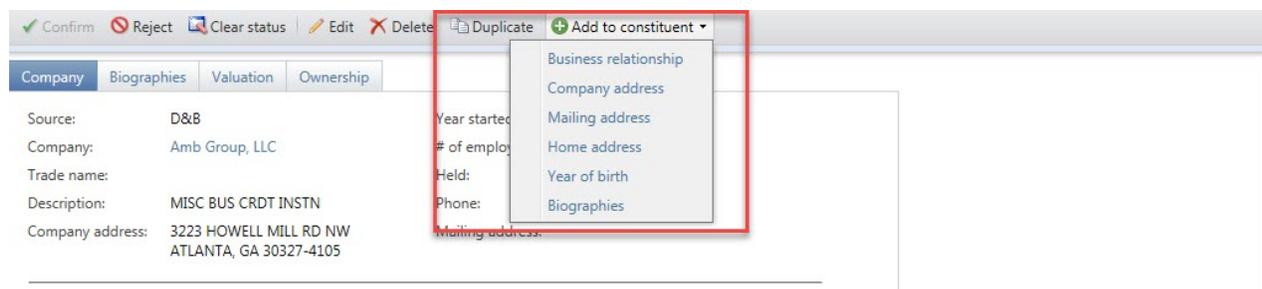
## Copy Information from a Wealth Detail Match

In addition, we've also added a way to duplicate existing information from a wealth search. Select **Duplicate** to open a new modal window with fields from the existing match already populated. From here, you can change the information as needed and then save a new version without having to first create a new form from scratch.

Timestamp Confirmed Research Statuses

When enabling the **Research status** checkbox, a timestamp is now added to the field to show when this confirmation was made.

Reorganized and Newly Added Major Giving Capacity Values

We've updated the **Major Giving Capacity** value ranges to make it easier to capture higher wealth. The smaller values have been combined into a new range from **$1 - $10,000**, while the maximum value range has been increased to **$50,000,000 and up**.
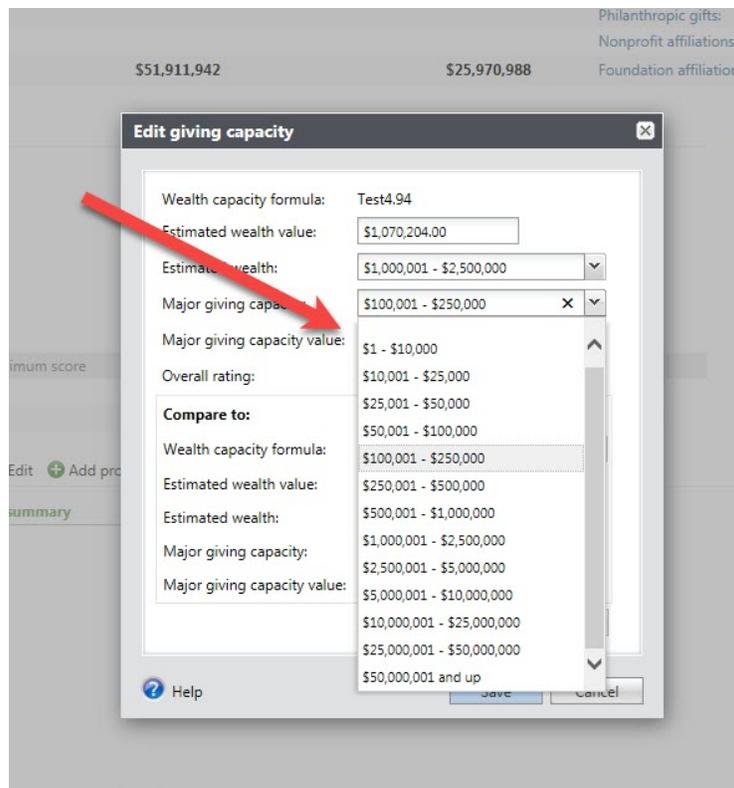
Prospect Manager Details and Historical Data

Prospect Manager Details is now separated from **Research details** and expanded to allow capturing of new information such as historical information. **Prospect Manager Details** displays the current staff member assigned to a specific prospect, their role, and when they started in this role.

Prospect Manager History keeps a record of all the changes to this role over the years. You are able to see each person assigned to the prospect including when they started in this role and when they finished. Select **Replace prospect manager** to not only assign a new individual, but add the person being replaced to this history section.

Customize Name Displays

Users now have the option to customize and configure how constituent names appear. Under **Prospects** and then **Configuration**, two new options have been included: **Wealth page display name** and **Manage name formats**.

Manage name formats is where you can build out brand new display options. All previously created formats are listed here and can be edited or deleted as needed. Select **Add** to bring up a new modal where new fields can be selected such as first name, last name, and many more. To add custom values, select **Add new text field**. From here, you can add customized words that can just display as they are written such as *and*.

Wealth Page display name is where you select the format to be used to display the prospects name. Keep in mind that this is a system wide change and cannot be applied individually.

ResearchPoint Bug Fixes

1. Income now returns in a wealth search as expected.
2. Previously, after **Affluence data** was synced, the **Currency** field in *ResearchPoint* was imported as text, preventing it from being correctly sorted when viewed from a list. This is fixed.
3. **Confidential Indicator** is now added to a report when enabled from **Advanced Settings**.
4. The **Research Summary** is no longer listed at the top of a prospect research report.

Target Analytics Data Updates

Since our Q4 2018 release, we have refreshed the data for NOZA, Larkspur, GuideStar, Federal Elections Commission (FEC), Who's Who, and Thomson Reuters Business Intelligence (TRBI) in our Target Analytics database.

ResearchPoint Feedback

Do you want to influence the direction of the product? You can in the Target Analytics Community. We're there with you in the community and we're listening for which features you want added or which existing functionality needs to be improved.

You can add a new idea, vote for ideas you want to see implemented, or respond to an existing idea with comments about what you need specifically. The more you tell us, the better we can prioritize and design the product around your organization's needs.

How do ideas get implemented? Ideas with the most likes are more heavily favored when we consider what we should put on our roadmap for *ResearchPoint*. To see all the current user-posted ideas, from the Target Analytics Community home page, in the **Navigation Menu**, click **Ideas**. We look forward to hearing from you on how you need *ResearchPoint* improved!