Release Notes: July 2015 (4.4)

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 Target Analytics ***ResearchPoint*** users in your organization.

Historical Real Estate Improvements

In this release, we resolved an issue where CoreLogic real estate records could be incorrectly marked historical during a wealth screening process. If you believe a prospect record may have CoreLogic real estate records incorrectly marked as historical, we recommend you re-screen the individual affected. If the property record remains historical, it's likely an accurate result based on either an address change by the constituent or a county APN change.

APN (assessor parcel number) is a unique identifier for real estate. However, APNs can change and without a consistent pattern because individual counties determine how to format their APN. For example, an APN county identifier changed from 01261801440000 to 123119. The issue does not affect new prospect wealth screenings, only when you re-screen an existing prospect who lives in a county whose APN has changed. We want to give you the opportunity to track historical and current properties to accurately determine the potential of your prospect as a major giver to your organization. We do not want to take data away from you to prevent these duplicates from occurring when APNs change.

The record state column will use the following logic to prevent duplicates when addresses change:

- **New** – When you wealth screen, if a property doesn't match an existing record in your database but exists in CoreLogic, the property asset is marked as "New." Once a user views this record, the status updates to "Current."
- **Historical** – When you wealth screen, if a property was in your database before the screen but doesn't match any records in CoreLogic, the property asset is marked as "Historical."
- **Current** – When you wealth screen, if an existing property in your database matches a record in CoreLogic, the property asset is marked as "Current."

Target Analytics Data Updates

Since our 4.2 release, we have updated the following Target Analytics data sources:

NOZA: The world's largest database of public charitable donations. This information is stored on the constituent's wealth and ratings record, Giving tab, under Philanthropic gifts. For each donation, a gift

range, organization donated to, organization category, gift year, and name on the gift returns. You can use the web address or source material to help you confirm the data belongs to your prospect.

FEC: Federal Elections Commission data, from the Internal Revenue Service, contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns. Information includes the amount of the contribution, the recipient, and the date. This information is stored on constituent's wealth and ratings record, Giving tab, under the Political donations section.

CoreLogic: Tracks the constituent's real estate holdings including real estate valuation estimates. Identifies properties owned for a deed, parcel, and mortgage. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

Dun & Bradstreet: The world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies. Provides you with data about the constituent's employment. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Businesses section.

Latest Data Record Counts for ResearchPoint

As the industry leader in comprehensive individual wealth and philanthropic insights, we continue to work diligently to keep the WealthPoint data current. Target Analytics provides you a searchable database of more than 110 million US households, and 200 million consumers. Here's a snapshot of our latest data counts:

Vendor	Record Count
NOZA	109 million +
FEC	24 million +
Dun & Bradstreet	22 million +
CoreLogic	148 million +
Experian	326 million +
GuideStar	26 million +
Marquis Who's Who	1.28 million +
Larkspur	8.5 million +
Thomson Reuters	13 million +

Unlimited Users for ResearchPoint

Great news for existing and new *ResearchPoint* customers. We are now supporting unlimited user accounts across all contract levels. Now, you can share ResearchPoint searches within your organization, including giving your fundraisers access to *ResearchPoint*. To help you determine how to assign the appropriate permission levels for new *ResearchPoint* users, review our *Manage Application Users Guide*. You can also learn how to add, edit, and remove application users.

Expand and Collapse Query Folders

To help you better sort and find your queries, we added the ability to expand all or collapse all query folders in the Information Library. To easily view your folders and sub-folders, click **Expand all** and **Collapse all**. When you collapse all, only first-level folders are displayed. When you expand all, you see all query folders and sub-folders.

To access your queries, from *Analysis*, click **Information library**.