ResearchPoint™

Release Notes: September 2015 (4.5)

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.

Target Analytics Data Updates

Since our 4.4 release, we have refreshed the data for NOZA, Federal Elections Commission (FEC), Experian, and Thomson Reuters Business Intelligence (TRBI) in our Target Analytics database. TRBI appears in *ResearchPoint* as MarketGuide.

We saw an increase in record counts for all data sources and we made a performance improvement to the GuideStar recursive matches.

Now, when you perform WealthPoint screenings on a constituent's wealth and ratings record, you'll have the latest philanthropic gifts, political donations, and income/compensation information.

Also, an important note from the Experian data. On the home page, when you perform a search of the Target Analytics prospecting database, if a prospect has more than one contact address found, the first address shown is now the "best mailable" one. So, if you search for a prospect in New York, but the best mailable address is in California, the California address is shown first. The New York address matching your criteria will appear if you click through the results.

Performance Enhancements

To improve WealthPoint screening times, we made improvements to how we process GuideStar and NOZA wealth screening results.

Windows 10 Compatibility

For this release, we tested *ResearchPoint's* compatibility with *Windows 10*. We found a couple *Microsoft* issues to make you aware about, if you switch to *Windows 10* and the *Edge* internet browser.

- In *Edge*, we found an issue where the browse to upload file option doesn't always work. This is a known bug in *Edge*. Some users report the issue is fixed if you update *Edge* to the latest version.

In **ResearchPoint**, the browse to upload file option affects the following areas: upload a profile picture for a constituent and add a documentation attachment on the Biographical Information tab. If you encounter this issue, we recommend you use an alternative browser like *Firefox* or *Chrome*, or upgrade *Edge* to the latest non-beta version.

- In *Edge*, we also observed an issue on the launch page for **ResearchPoint**. The **Start ResearchPoint** link to launch the login screen, does not work. We recommend you use a direct login URL instead.

  While we recognize this is not ideal, if you want to use *Edge*, we do have a workaround. We recommend you open another internet browser and click **Start ResearchPoint**. After the page redirects, copy and paste the URL link into *Edge*. Once you navigate to the page, bookmark the link for future use, or until *Microsoft* fixes this issue.

ResearchPoint in Development

Our goal is to keep you informed of what we're working on to make your prospect research better. Each release, we're going to use this section as an opportunity to share what we've been in development on for you!

- As you may have seen in the community, discovery on notifications began in July. The **ResearchPoint** team has begun research into how we could use notifications to help you stay up-to-date on your prospects. In late July and August, Jackie Koesters, your **ResearchPoint** Product Manager, and Michael Stallings, your User Experience Designer, attended APRA and met with some of you to learn your thoughts about notifications. In September, Jackie and Michael continued research with remote online meetings. As we progress in development, we'll share more details.

- Up next, we have some compatibility testing for **ResearchPoint** with **Raiser's Edge 7.95** and **Blackbaud Web Services** releases.

- We also have a plan to complete a data refresh of your Larkspur data. Larkspur is our provider of wealth indicators data. Larkspur is the leading provider in comprehensive wealth information including the identification of luxury items such as yachts and planes, and millionaire codes.

ResearchPoint How-to Help

Did you miss a release? Going forward, we added a new feature to your What's New page in your **ResearchPoint** Help. In the program, to open the help, click the question mark in the top right corner of the page. From any topic, click the **What's New** link at the top of the help pane. At the bottom of the What's New page, you'll see a link to **What's Recent**. Click this link to see what we've been up to in the last year with **ResearchPoint**!

For this release, we also created two new, updated videos to help you with how to use the **ResearchPoint** home page for your one-stop prospect search and add. Even if the prospects are known to you, we recommend you use the home page to make finding and adding prospects easier and faster, with an initial set of accurate, highly confident information.

- One-Stop Prospect Search and Add
- Deep Dive into the Target Analytics Prospecting Database Search

For more **ResearchPoint** how-to information, see the How-to Documentation page.