Release Notes: September 2016 (4.92)

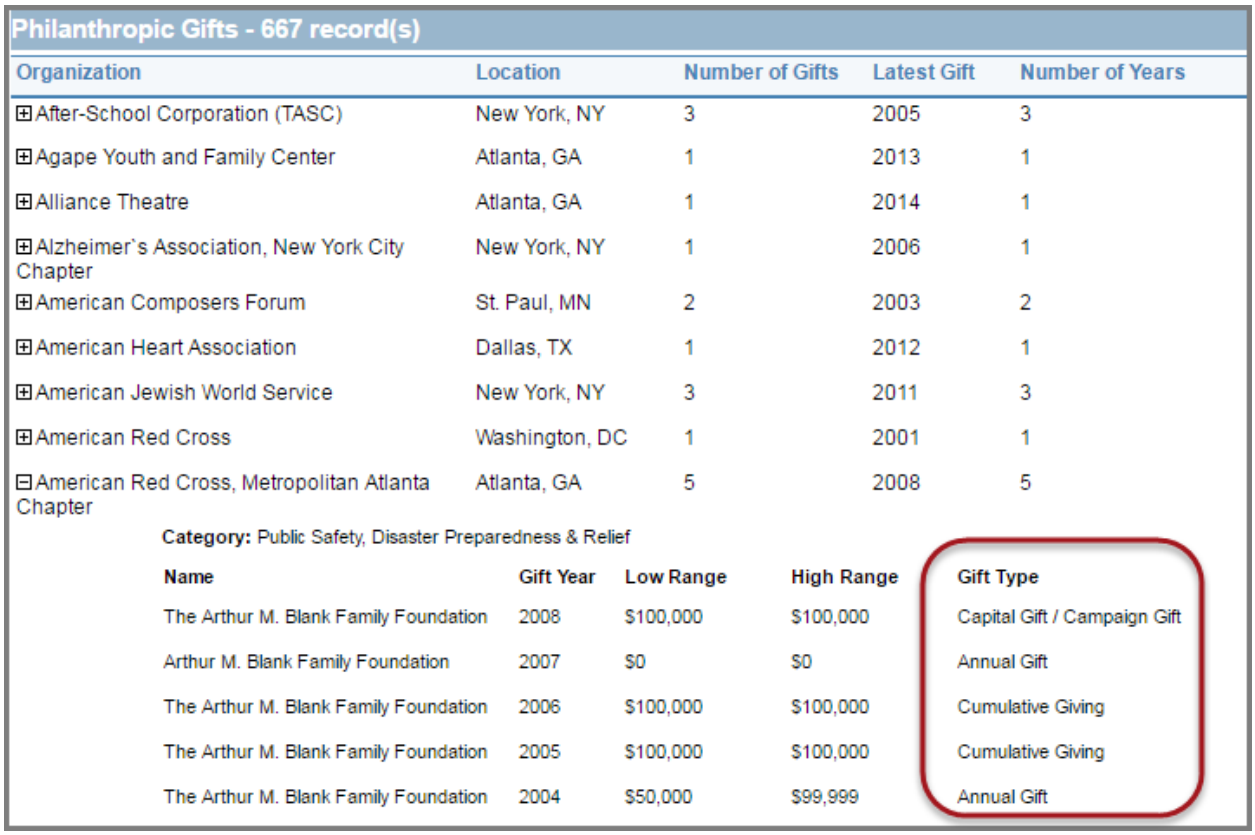
Before you begin to use Target Analytics ResearchPoint, take a moment to review the following notes. It is important to share this information with all Target Analytics ResearchPoint users in your organization.

Philanthropic Giving Report Enhancements

We've made updates around Philanthropic Gifts and reporting by enhancing the prospect research report templates to improve the way you view **Philanthropic gifts** data. To access the report templates, click **Prospects**, then click **Prospect research report templates** under *Configuration*.

Gift Type is Now Available on the Report

We've updated the subsection of the **Philanthropic Gifts** section to list specific gift types (for example, annual or cumulative). By seeing the type of gifts that a prospect has given to other organizations, you'll now have more information to help you decide how to approach that prospect.



Philanthropic Gifts - 667 record(s)

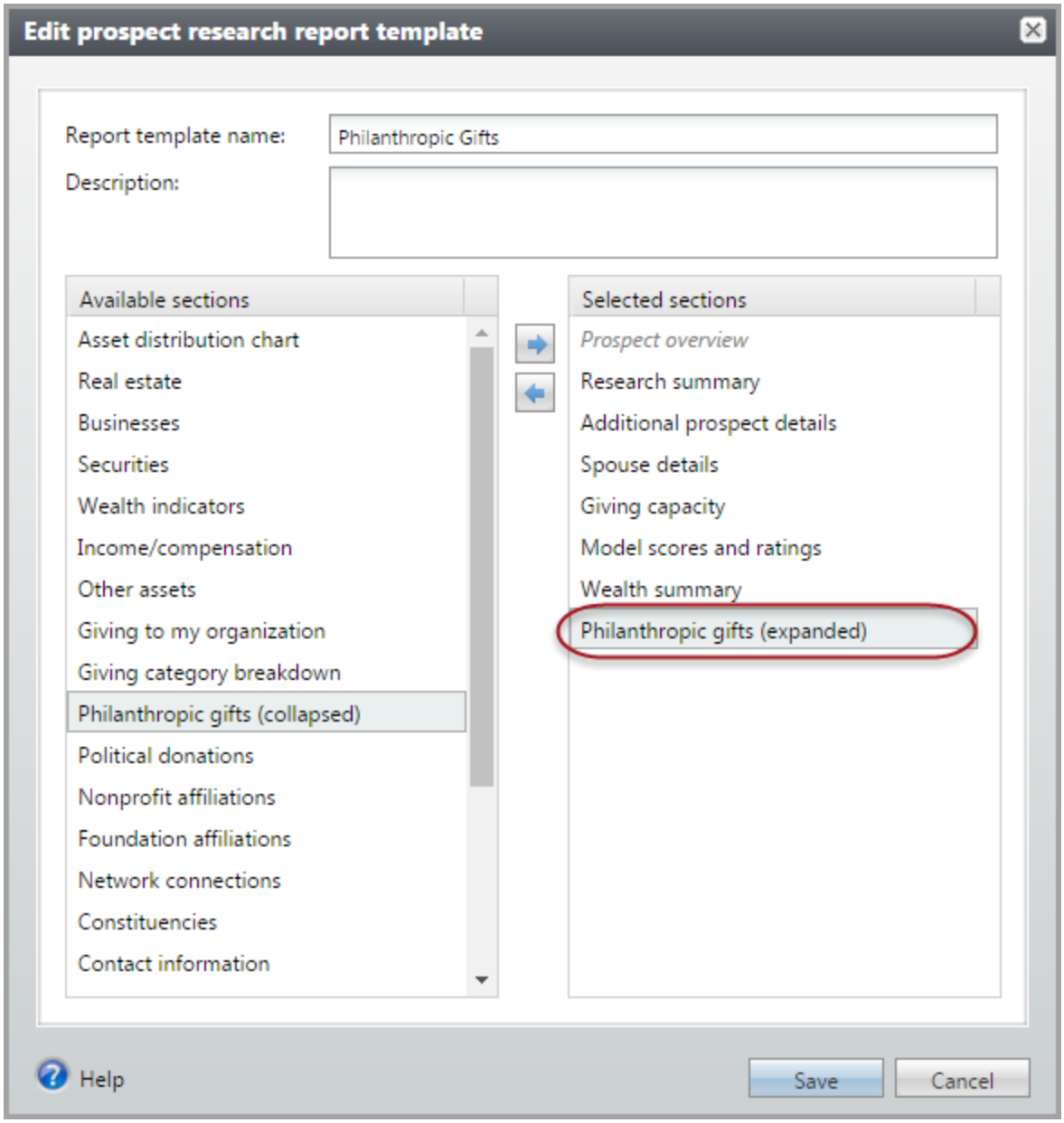
Organization	Location	Number of Gifts	Latest Gift	Number of Years
⊞After-School Corporation (TASC)	New York, NY	3	2005	3
⊞Agape Youth and Family Center	Atlanta, GA	1	2013	1
⊞Alliance Theatre	Atlanta, GA	1	2014	1
⊞Alzheimer`s Association, New York City Chapter	New York, NY	1	2006	1
⊞American Composers Forum	St. Paul, MN	2	2003	2
⊞American Heart Association	Dallas, TX	1	2012	1
⊞American Jewish World Service	New York, NY	3	2011	3
⊞American Red Cross	Washington, DC	1	2001	1
⊟American Red Cross, Metropolitan Atlanta Chapter	Atlanta, GA	5	2008	5

Category: Public Safety, Disaster Preparedness & Relief

Name	Gift Year	Low Range	High Range	Gift Type
The Arthur M. Blank Family Foundation	2008	$100,000	$100,000	Capital Gift / Campaign Gift
Arthur M. Blank Family Foundation	2007	$0	$0	Annual Gift
The Arthur M. Blank Family Foundation	2006	$100,000	$100,000	Cumulative Giving
The Arthur M. Blank Family Foundation	2005	$100,000	$100,000	Cumulative Giving
The Arthur M. Blank Family Foundation	2004	$50,000	$99,999	Annual Gift

Expand All Gifts with a New Template Option

To help you better view the **Philanthropic gifts** data included in your prospect research reports, we've added a new section to the prospect research report templates called *Philanthropic gifts (expanded)*. Previously, there was one existing section called *Philanthropic gifts* that you could expand to view more details; that section has been renamed to *Philanthropic gifts (collapsed)*.



Now, if you want to have the **Philanthropic Gifts** section in your prospect research report expanded by default, include the *Philanthropic gifts (expanded)* section in the template. If you prefer not to have the section expanded by default, include the *Philanthropic gifts (collapsed*) section instead. Typically, you only need to include one of these sections in the template, depending on your preference to either show or hide the details by default.

Target Analytics Data Updates

Since our 4.91 release, we have refreshed the data for NOZA, Federal Elections Commission (FEC), Experian, TRBI, Larkspur, and Guidestar in our Target Analytics database.

Overall, when you perform WealthPoint screenings on a constituent's wealth and ratings record, you'll have the latest philanthropic gifts, political donations, nonprofit affiliations, real estate assets, wealth indicators, self-reported biographical data, and business affiliation records.

Duplicate Addresses in Constituent Update Batch Imports

We fixed an issue where an error occurred when importing existing constituents into a constituent update batch, with addresses of the same type and address block, city, state, and zip code that matched an existing address. Previously, after resolving the duplicate, the message "The address you entered already exists for this constituent" would display and one of the addresses would be duplicated in the address collection field. Now, after resolving the duplicate, the address is matched to the existing one as expected.

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!