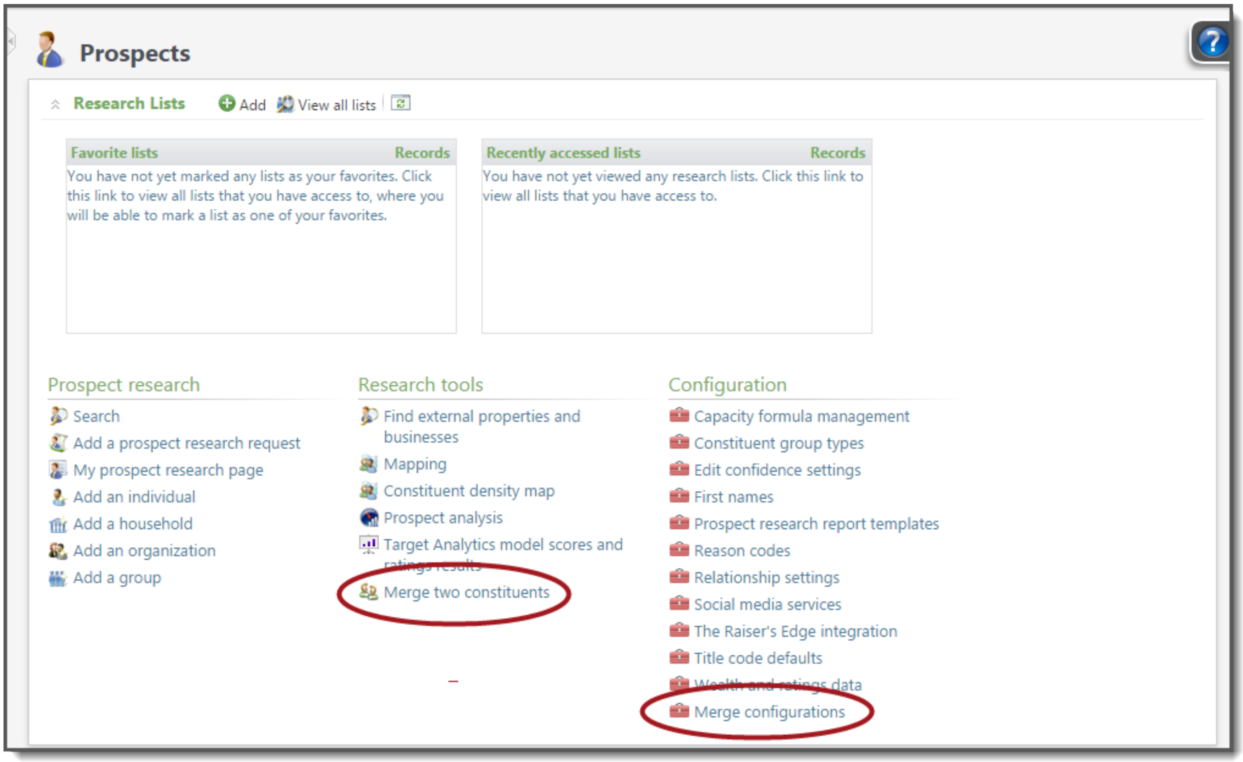
Release Notes: June 2017 (4.96)

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.

New Constituent Merge Feature

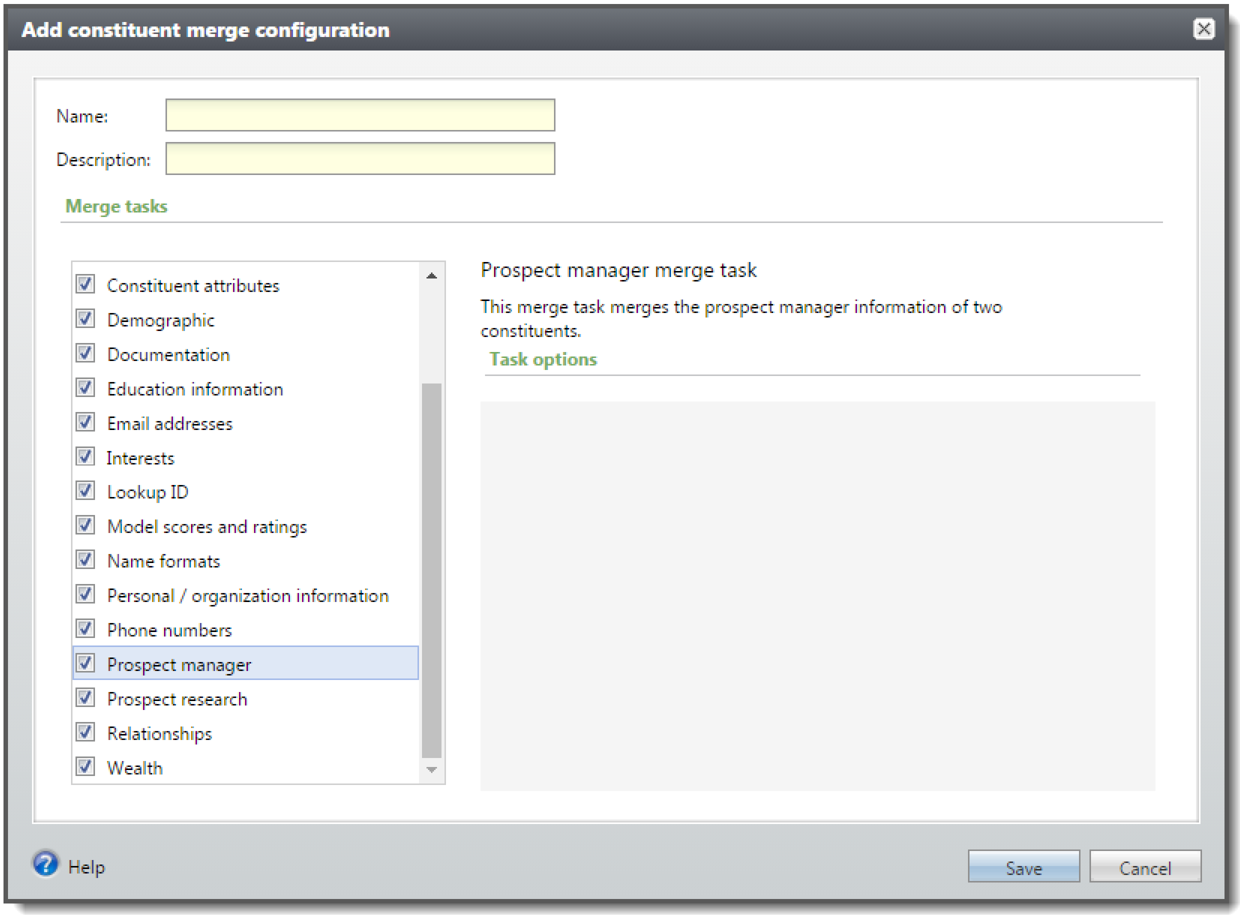
In this release, we're introducing our new Constituent Merge feature that enables you to merge duplicate constituent prospect records in your ***ResearchPoint*** database. After you find duplicate constituents saved in your database, you can remove duplicates by consolidating information on matched records through merge processes. You can configure how merge processes handle conflicting data on duplicates.

The Prospects page now includes links to merge two constituents and to set up a merge configuration.

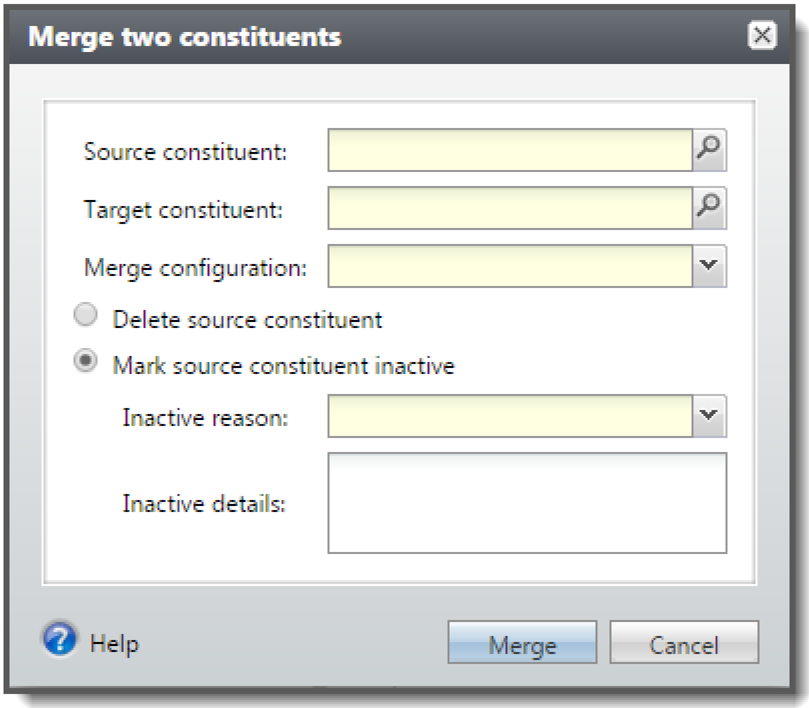


Use the **Merge configurations** link under Configurations to add or edit a merge configuration. Merge configurations determine the data that is merged from source constituent records to target constituent records when a merge process is run. When you add or edit a configuration, you can specify the type of information that is merged by a process.

To merge different types of constituent information, you can add multiple merge configurations and select different merge tasks for each.



To merge two constituents, use the **Merge two constituents** link under Research Tools. ***ResearchPoint*** removes duplicates by consolidating information on matched records through merge processes. On the *Merge two constituents* screen, you can configure how a merge process handles conflicting data. For example, if names are different on matched constituents, you can choose whether to keep the target's name, source's name, or whichever name is most complete. You can also choose whether to delete the source constituent or mark it inactive after the merge.



For more details about merging constituents, see the ResearchPoint online help.

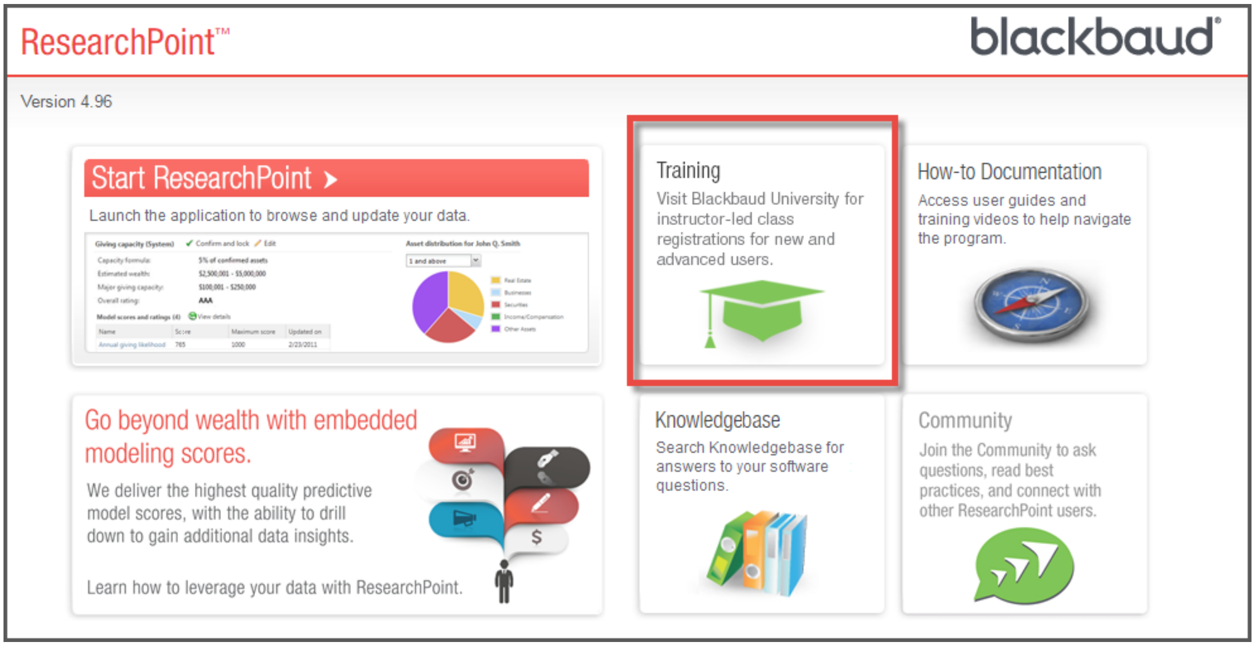
Configure Inactive Reason Codes

In preparation for using the new merge functionality, you'll need to configure ***ResearchPoint*** to specify a reason code for constituent records that are marked as inactive. Since ***ResearchPoint*** requires you to select a reason code from an existing list, you'll need to add Inactive reason codes to your ***ResearchPoint*** database ahead of time.

For detailed instructions, check out the blog post on Target Analytics Community.

ResearchPoint Training Update

ResearchPoint training is now available through Blackbaud University. We've updated the ***ResearchPoint*** start page so when you select the Training link, you're connected directly to Blackbaud University, where you can get information or take a class.



For more details, visit the ResearchPoint Training Renovation blog post in the Target Analytics Community.

Geocode Issue Resolved

We resolved the periodic failure that was occurring when attempting to geocode addresses.

Target Analytics Data Updates

Since our 4.95 release, we have refreshed the data for NOZA, CoreLogic, Dun & Bradstreet, Federal Elections Commission (FEC), Who's Who, and Thomson Reuters Business Intelligence (TRBI) in our Target Analytics database.

Now, when you perform WealthPoint screenings on a prospect's wealth and ratings record, or when you perform a screening on your research lists, you'll have the latest philanthropic gifts, real estate assets, business assets, political donations, biographical data for industry leaders, and income records.

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!