



# Release Notes: September 2017 (4.97)

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.

## Giving Data now included in Wealth Capacity Formula

In this release, you can now include giving data — from NOZA, FEC, and individual giving — in the wealth capacity calculation. The Add capacity formula screen and Edit capacity formula screen now include a **Giving** tab that you can use to specify one or more types of data to include in the calculation:

- **Philanthropic gifts** – Uses giving data from NOZA
- **Political donations** – Uses giving data from Federal Election Commission (FEC)
- **Giving to my organization** – Uses giving data synchronized from Raiser's Edge or manually entered in the Giving to my Organization section on the Wealth and Ratings page

On the Prospects page, select **Capacity formula management** under Configuration. On the Capacity Formula Management page, select **Add** to add a new capacity formula — or select an existing formula's menu and select **Edit** — then select the **Giving** tab.

**Add capacity formula**

Name/Description Assets **Giving** Calculations

Giving options to include in capacity

- Philanthropic gifts
- Political donations
- Giving to my organization

**Philanthropic gifts calculation settings**

Data source(s) to include: NOZA, Inc.

Use confirmed records only

Multiply value by: 1.0000

If less than: \$0.00

Multiply value by: 0.0000

Otherwise multiply by: 0.0000

Value to use in calculation: Largest low range value

Help Save Cancel

For the **Philanthropic gifts** and **Political donations** settings, you can select which data sources to include, select whether to include only confirmed sources, and customize the mathematical formula. For the **Giving to my organization** setting, you can select the value to use in the calculation, then customize the mathematical formula. For example, you can multiply a prospect's wealth value by greater or less than 1.000 to increase or decrease an aspect of wealth.

On the prospect's Wealth Summary tab, under **Giving capacity**, the major giving capacity basis is now shown.

The screenshot shows the 'Wealth Summary' tab with the following data:

Assets	Total identified	Confirmed	Other indicators
Real estate:	\$36,294,062		Wealth indicators:
Businesses:	\$0	\$0	Biographical data: <b>NEW</b>
Securities:	\$4,035	\$4,035	Political donations:
Income/compensation:			Philanthropic gifts:
Other assets:			Nonprofit affiliations: <b>NEW</b>
<b>Total assets:</b>	<b>\$36,298,097</b>	<b>\$4,035</b>	Foundation affiliations: <b>NEW</b>

Below the assets table, the 'Giving capacity (System)' section is visible, showing:

- Capacity formula: Top capacity comparing assets and giving
- Major giving capacity basis: **Philanthropic giving** (highlighted with a red box)
- Estimated wealth: \$1 - \$5,000 (\$4,035)
- Major giving capacity: \$10,001 - \$25,000 (\$25,000)
- Overall rating:

At the bottom, the 'Model scores and ratings (6)' section is partially visible with columns for Name, Score, Maximum score, and Updated on.

For more details about adding and editing wealth capacity formulas, see the **ResearchPoint** online help.

## Changes to Single Sign-on (SSO)

**ResearchPoint** now supports two-step authentication with your Blackbaud ID.

While your email address and password help secure your Blackbaud ID used to sign in to **ResearchPoint**, you can now add an extra layer of security! With two-step authentication, your Blackbaud ID requires a unique verification code — received on your personal device, to confirm your identity — in addition to your usual credentials.

To add this extra layer of security, select the **Welcome** drop-down in the omnibar, then select **Blackbaud ID profile**. Under **Two-step authentication**, select **Turn on**. When you turn on two-step authentication, you can choose:

- How to receive your verification codes — as text messages, or through a [mobile authenticator](#) such as [Google Authenticator](#) or [Auth0 Guardian](#).
- Whether to exempt a device and browser — like one you frequently use — from requiring a verification code for 30 days.

If you have any trouble, check out the [Troubleshoot Two-step Authentication Help](#).

## Target Analytics Data Updates

Since our 4.96 release, we have refreshed the data for NOZA, CoreLogic, Dun & Bradstreet, Federal Elections Commission (FEC), 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, 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!