Release Notes: Q1 2020 (January) Release

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.

Stay Organized with Research List Folders

If you've been using ***ResearchPoint*** for any length of time, then you know that the default Research Lists can get fairly long over time. To help you stay organized, we now have a way to create folders here, similar to what ***ResearchPoint*** uses for **Query** from **Information Library** under **Analysis**.

Use the **Manage folders** option to add, edit, or delete new folders for the Research List. In addition, a **Move** button can be used to modify existing lists to put them in newly created folders.

Reorganized Wealth and Ratings

To start the year off fresh, we've updated and reorganized the Wealth and Ratings Page.

So what's changed? Here's the list:

- **WealthPoint Search History** is now the first tab. We've also added new **WealthPoint Setup**, **Subscription status**, **Update screening status**, and **Edit WealthPoint configuration** buttons here as well. **Subscription**, **Group screens remaining**, and **Wealth records to return** have been moved here.
- For the **Data Refresh** tab, **Disable Data Refresh** and **Start a Data Refresh** tasks have been added to the section title.
- The **WealthPoint Audit Reports** tab now features the **Enable WealthPoint Audit** task.

Query on Research Request Date Completed

Research managers can now query on **Research Request Date Completed** against the **Date Entered**. This should help to determine the efficiency of the research team as well as seeing how fast the turnaround was.

Target Analytics Affluence Scores Come to Prospect Analysis

Users now have the option to use the **Target Analytics Affluence Model Score Attributes** when working within **Prospect Analysis** (if they have purchased the TA Affluence Models). Previously, this feature contained model scores that could not be changed or updated.

Thomson-Reuters Vendor Update

Within this release and going forward, the Thompson-Reuters Financial & Risk vendor will now be known as Refinitiv. This change was implemented as of December 31, 2019.

Target Analytics Data Updates

Since our Q4 2019 release, we have refreshed the data for NOZA, GuideStar, CoreLogic, Dun & Bradstreet, Federal Elections Commission (FEC), and Refinitiv 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,(NOZA) nonprofit and foundation affiliations, self-reported biographical data, business assets, political donations, biographical data for industry, 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!