

Release Notes: Q2 2019 (April) 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.

Improve Audit Tracking with WealthPoint Audit Reports and more

This release introduces the **WealthPoint Audit Report** under **Wealth and Ratings Data**. This report enables you to view wealth changes to prospect records. Filters can also be applied to return data that’s more specific to what you need including a start and end date, maximum rows per data, and a specific application, or user.

In addition, the **History** section under **Biographical Information** on a record now features the field type **Wealth**. This area records a history of changes logged for wealth related events including who was working in the record as well as what they updated. Keep in mind that this feature is disabled by default and needs to be enabled from the **Wealth and Ratings Data** toolbox.

The screenshot shows the 'History' section of a record in ResearchPoint. The 'Field type' is set to 'Wealth' and the 'Action' is 'All'. The report shows a list of changes:

Date	User	Action	Field changed	Value before	Value after	Process	Application
4/10/2019 9:33:23 AM	Anthony Pisano - anthony.pisano@blackbaud.com	Edit	Wealth:CONFIRMED	False	True	Application	Blackbaud App Server (WebShell)
	Anthony Pisano - anthony.pisano@blackbaud.com	Edit	Wealth:CONFIRMEDBYAPPUSERID		Anthony Pisano - anthony.pisano@blackbaud.com	Application	Blackbaud App Server (WebShell)
	Anthony Pisano - anthony.pisano@blackbaud.com	Edit	Wealth:DATECONFIRMED		2019-04-10T09:33:23	Application	Blackbaud App Server (WebShell)
4/10/2019 9:32:28 AM	TESTAppPoolD5740ARE08	Edit	Wealth:VIEWED	False	True	Application	Blackbaud App Server
4/10/2019 9:32:26 AM	Anthony Pisano - anthony.pisano@blackbaud.com	Add	Wealth:AIRCONDITIONING	n/a		Application	Blackbaud App Server (WebShell)

Rasier’s Edge Integration Updates

This release also brings several changes to the ResearchPoint Raiser’s Edge Integration:

- The constituent's spouse in *The Raiser's Edge* now syncs over when adding records from a **Raiser's Edge Query** to a **Research List**. A new checkbox option is on by default for those who want to sync the spouse data.
- **Deceased Status** and **Deceased Date** now sync to *ResearchPoint* with the *Raiser's Edge* integration. We've also updated the description in the *Raiser's Edge* integration **Settings** under **Biographical Information**.
- When syncing *ResearchPoint* and *The Raiser's Edge*, the birth date value in *ResearchPoint* is no longer removed if the *Raiser's Edge* value is empty. In addition, when creating a record in *Raiser's Edge*, the birth date will be pulled in from *ResearchPoint*.

ResearchPoint User Interface Changes

In this update, we've also made a few user interface changes. First off, we've changed the vendor names listed when selecting a source under **Edit confidence settings**. Instead of displaying the specific vendor names, we've replaced them with the type of result they provide. For example, *CoreLogic* is now listed as **Real Estate**.

As part of this UI change, we've combined some Vendors who operate within the same field into one new type:

- *Who's Who* and *Experian* are now located under **Biographical Data**.
- *NOZA* and *DonorBank* (if applicable) are now located under **Philanthropic Giving**.

Issues Resolved for ResearchPoint

1. Users were previously able to select attributes other than **Model Scores and Ratings** when trying to sync from *ResearchPoint* to *Raiser's Edge*. These other types have now been removed.
2. *Raiser's Edge Integration* Solicitor Sync now interacts correctly with the newly added **Prospect Manager History** section.

Target Analytics Data Updates

Since our Q1 2019 release, we have refreshed the data for NOZA, GuideStar, Experian, 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, nonprofit and foundation affiliations, self-reported biographical data, real estate assets, business assets, political donations, 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!