

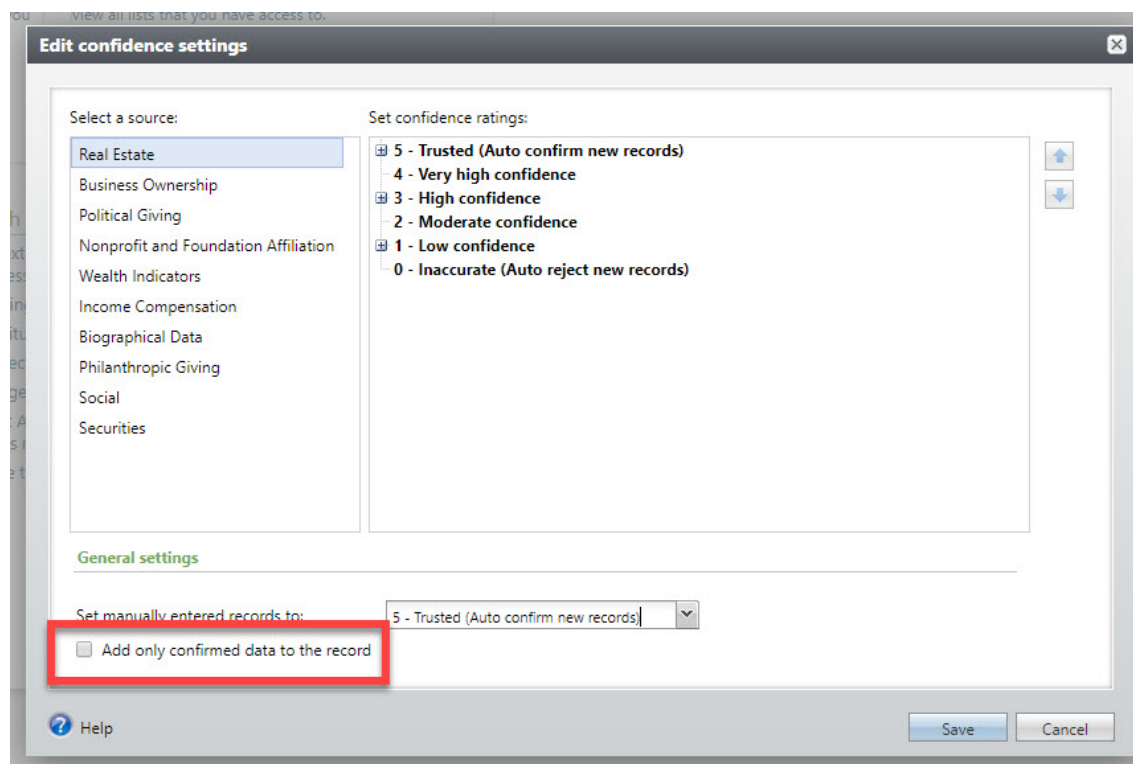
# Release Notes: Q3 2019 (July) Release

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.

## Confirmed only matches returned from a wealth search

This update features a new setting that can be enabled that will only return confirmed data when a wealth screening is run. From **Prospects, Edit Confidence Settings**, a new checkbox can be enabled under **General settings** that when checked will only return data on match codes that you have set at **5 - Confirmed**.

Some sources, like **Political Giving**, do not have a default **Confirmed** match option. In this case, unless the user moves match codes to different confidence levels, no data would return if this new box is checked.



# Add, edit, or delete your Wealth Sources

We've also added a **Wealth Sources** tab to **Capacity Formula and Source Management** page under **Prospects**. This new page gives you the ability to manage wealth sources that have been manually added to the system over time including **Add new sources** and **Edit/Delete** existing sources. You can also reconcile sources that may be misspelled or where you have added the same source to multiple wealth types such as *Google* which is listed both as **Real Estate** and as **Philanthropic Giving**.

The other benefit to this change is that this field is now considered a table field which makes querying specific data in a report much easier than previously.

Please note that **System sources** are not included here.

**Capacity Formula and Source Management**

Capacity formulas | **Wealth Sources**

**Wealth Sources (16)** + Add | Filters | More ▾

Source	Category
Fidelity Data Services	Real Estate
GS Bio	Biographical Data
GS BO	Business Ownership
GS IC	Income Compensation
GS NP	Nonprofit and Foundation Affiliation
GS Other	Other Assets
GS Phil	Philanthropic Giving
GS Pol	Political Giving
GS RE	Real Estate
GS Real Estate	Real Estate
GS Securities	Securities
GS WI	Wealth Indicators
LexisNexis	Real Estate
Other Assets	Other Assets
Test BD	Biographical Data, Business Ownership
www.google.com	Income Compensation

## Target Analytics Data Updates

Since our Q2 2019 release, we have refreshed the data for NOZA, GuideStar, 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, nonprofit and foundation affiliations, 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!