Reed Insight 2.0.1 Release Notes

Reed Insight 2.0 was released on Saturday, June 21, 2014. Below please find details concerning upgrades to the Reed Insight platform. For questions, please contact customerrelations@reedbusiness.com or
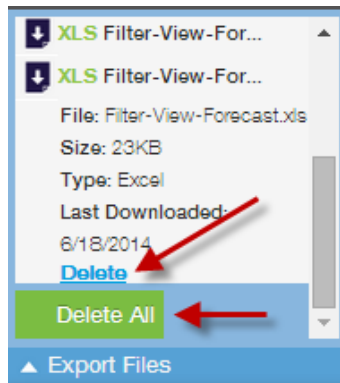 US: (800)424-3996, CAN: (800)959-0502

Forecast

Data Table Exports
- **Using Export Filtered View** – the "Export Filtered View" option on the data table is now functioning properly for all combinations of filters selected.
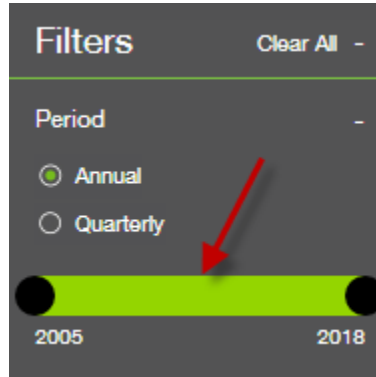

- **Deleting exports** – the "Export Files" menu now includes an option to "Delete All" export files in the menu, as well as an option to delete individual files.
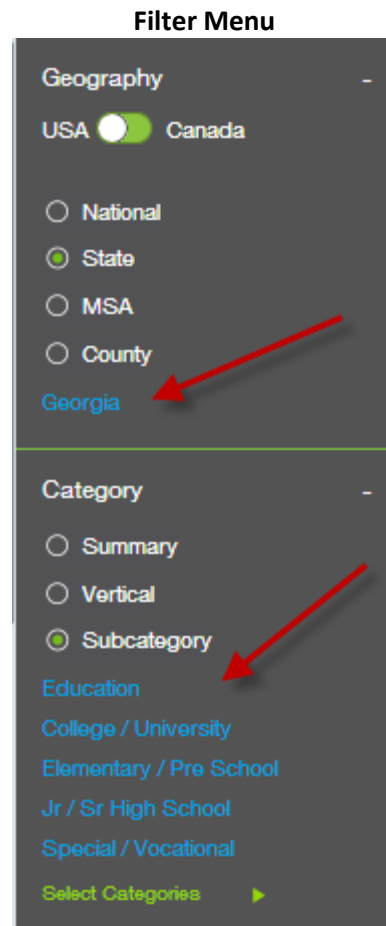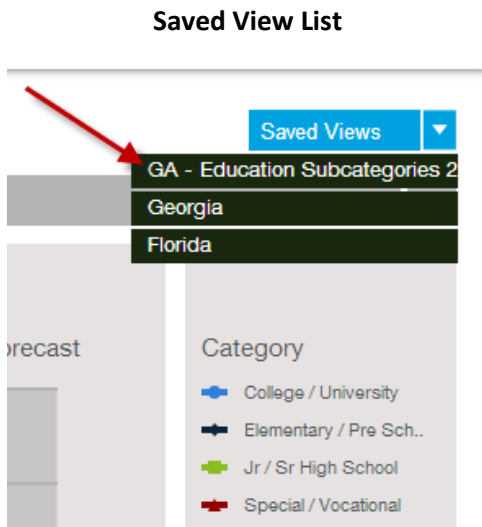
Period Filter

- **Changing the date range** – bug fixes and performance improvements have been applied to improve the response of the date range slider bar.

Saved Views

- **Selected filters** – when a Saved View is selected, the associated filters are now displayed in the Filter Menu.

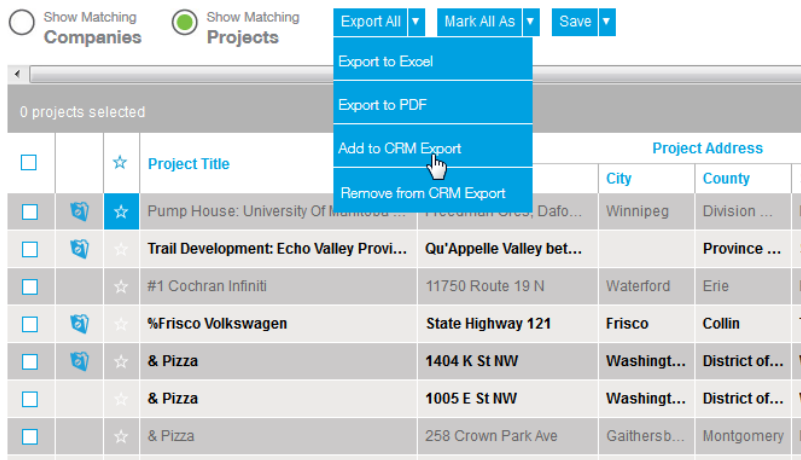**Saved View List**   **Filter Menu**

Intelligent Leads

CRM Integration Upgrade Available

Reed's data integration services allow your company to export summary level project data from Reed Insight for use in Customer Relationship Management (CRM) or Salesforce Automation (SFA) solutions. Data can be exported daily, weekly, or on a customized scheduled in multiple formats.
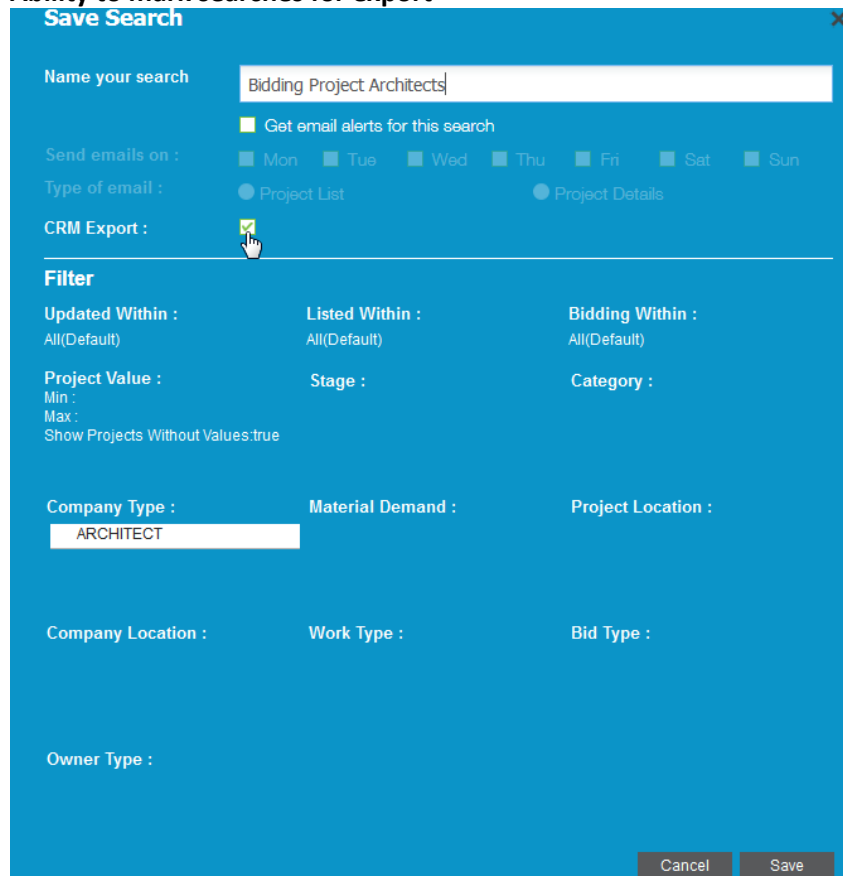
- o **Ability to mark projects for export**

- o **Ability to mark searches for export**

- o **Feed Options** - Ability to choose between "Legacy" type XML file based on DataLink, or new 1.3 schema that utilizes new data features of Insight like email addresses
  - o **Delivery Options** - Ability to send XML file any day of the week or combination of days of the week

- **NEAR searching**
Now users have the ability to search for words NEAR other words- within 25 words forward and backward, to be exact. This operator can be used on any filter.

- **Wildcard phrase searching**
Users can also end a phrase with a wildcard – so searching "community cente*" would return results for community centers, community center, community centering, etc. This can be done with any filter type.

- **New: Auto-correct the most common search errors**
  - o **multiple words treated as a phrase**
    C*oncrete wall* will now auto-correct to "concrete wall"
  - o **ascii quotes changed to proper quotes**
    curved quotes in a search will be changed to quotes like this: " to prevent errors
  - o **operators capitalized**
    entering wall and panel will now change the filter to wall AND panel, unless the operator was in a quoted phrase
  - o **friendly error messaging implemented**

- **New Export section** - This section holds all of your PDF and Excel exports for re-download – even if you log out after starting an export! Access this area with the left menu "Exports" button.

Exported Documents   ✕

Delete All

☐	File Name	Format	Date	Size
☐	ProjectList_a75e8a46-44a5-4f57-9b8f-5cdacf8b8a46	PDF	6/21/2014 1:52 PM	2.65 MB
☐	ProjectList_522299aa-0bef-4496-994d-4d0a2403f988	PDF	6/21/2014 1:43 PM	0.09 MB
☐	ProjectList_62d8c2d3-697f-42a8-9bbc-a6010ba23131	PDF	6/21/2014 1:42 PM	0.31 MB
☐	CompanyList_a9f7830a-a112-422e-b7fd-bd0affb2aff6	EXCEL	6/21/2014 1:38 PM	0.01 MB

- **New Feedback button** on every page – tell us what you like, let us know about any missing information, and more