

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

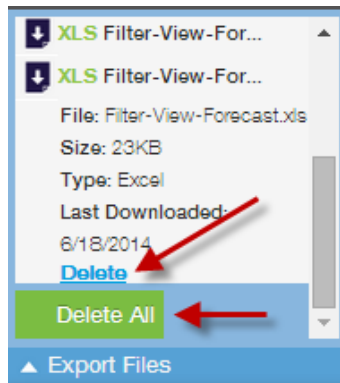
Forecast

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.

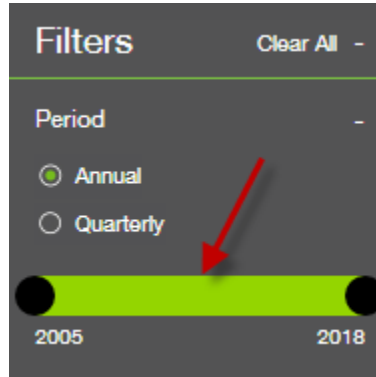


- **Deleting exports** – the “Export Files” menu now includes an option to “Delete All” export files in the menu, as well as an option to delete individual files.



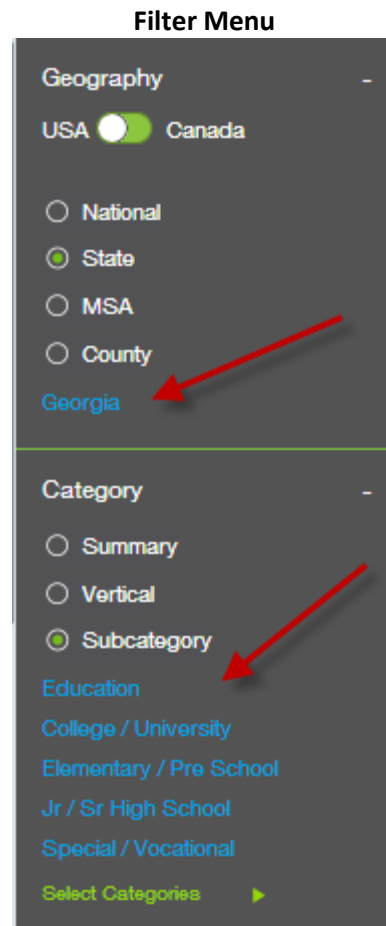
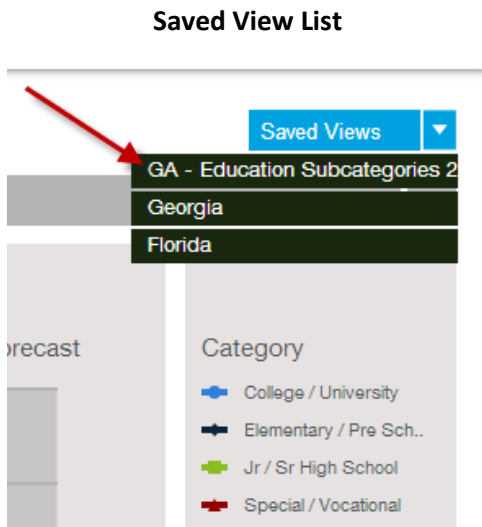
Period Filter

- **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.

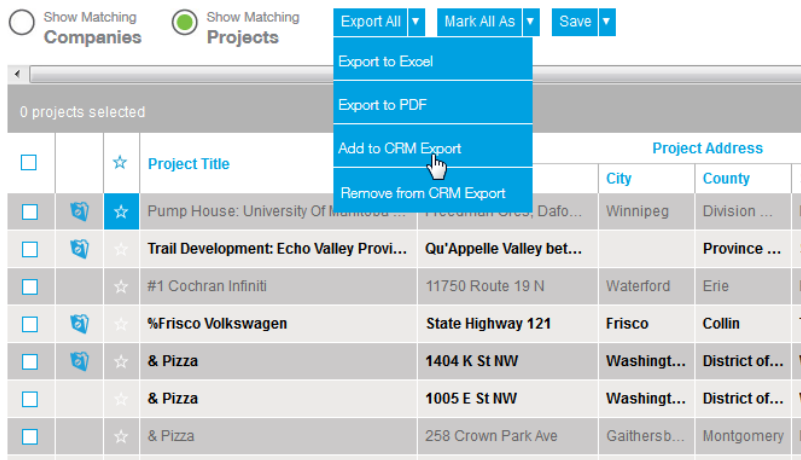


Intelligent Leads

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.

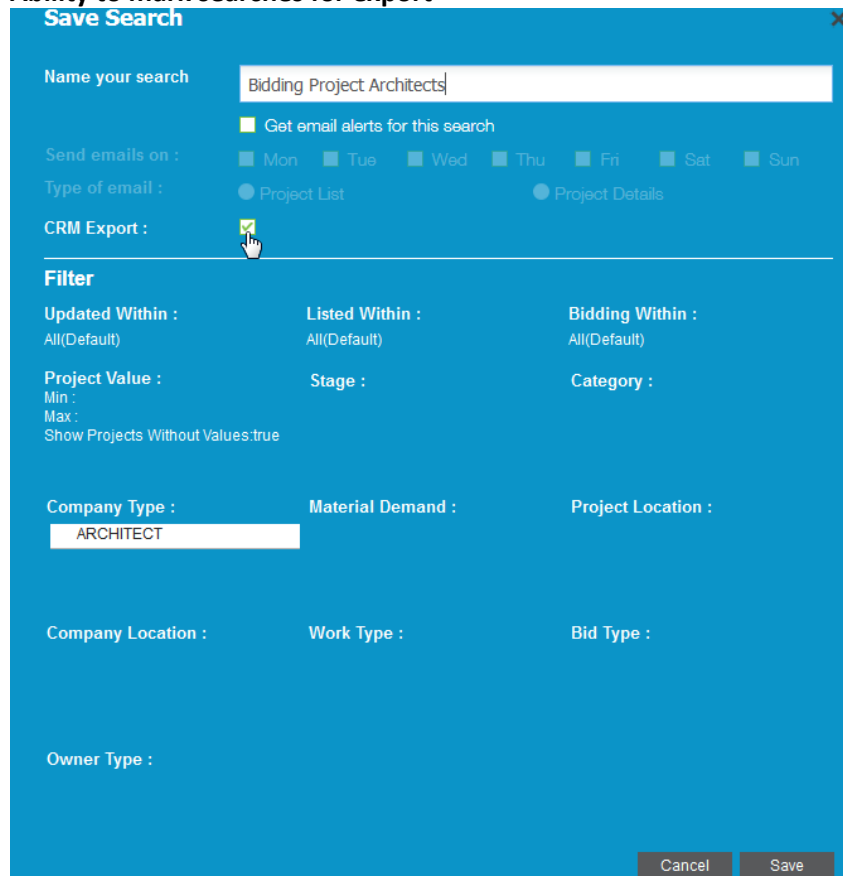
○ Ability to mark projects for export



The screenshot shows a web interface for managing projects. At the top, there are radio buttons for 'Show Matching Companies' and 'Show Matching Projects', along with buttons for 'Export All', 'Mark All As', and 'Save'. A dropdown menu is open, showing options: 'Export to Excel', 'Export to PDF', 'Add to CRM Export' (highlighted with a mouse cursor), and 'Remove from CRM Export'. Below the menu is a table of projects with columns for selection, project details, and project address.

		Project Title		Project Address	
<input type="checkbox"/>				City	County
<input type="checkbox"/>		Pump House: University Of Manitoba...	Winnipeg	Division ...	M
<input type="checkbox"/>		Trail Development: Echo Valley Provi...	Qu'Appelle Valley bet...	Province ...	S
<input type="checkbox"/>		#1 Cochran Infiniti	11750 Route 19 N	Waterford	Erie
<input type="checkbox"/>		%Frisco Volkswagen	State Highway 121	Frisco	Collin
<input type="checkbox"/>		& Pizza	1404 K St NW	Washingt...	District of...
<input type="checkbox"/>		& Pizza	1005 E St NW	Washingt...	District of...
<input type="checkbox"/>		& Pizza	258 Crown Park Ave	Gaithersb...	Montgomery

○ Ability to mark searches for export



The screenshot shows a 'Save Search' dialog box. The search name is 'Bidding Project Architects'. There are options to 'Get email alerts for this search' and to select days for email alerts. The 'Type of email' is set to 'Project List'. The 'CRM Export' checkbox is checked. Below are filter options for 'Updated Within', 'Listed Within', 'Bidding Within', 'Project Value', 'Stage', 'Category', 'Company Type' (set to 'ARCHITECT'), 'Company Location', 'Work Type', 'Bid Type', and 'Owner Type'. 'Cancel' and 'Save' buttons are at the bottom.

- **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
- **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**

- **multiple words treated as a phrase**
Concrete wall will now auto-correct to "concrete wall"

- **ascii quotes changed to proper quotes**

curved quotes in a search will be changed to quotes like this: " to prevent errors

- **operators capitalized**

entering wall and panel will now change the filter to wall AND panel, unless the operator was in a quoted phrase

- **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.

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

The screenshot shows the REED Insight dashboard. At the top left is the REED Insight logo and a 'MENU' button. At the top right, it says 'Welcome Claire Stubblefield'. Below the logo is a search bar with the text 'Search Project details with keywords or by project ID'. On the left is a vertical navigation menu with icons for Snapshot, Forecast, Analyze, Leads, Track, and Exports. The main content area is split into two columns. The left column shows statistics: 'New Projects 2,003', 'Updated Projects 10,682', 'Your Subscribed Projects 528,725 of 631,064', and 'Your Subscribed Companies 364,372 of 364,604'. The right column features a map of the USA with a legend for project counts by region. Below the map is a table with columns for Search Name, New/Updated, All, Architect, Engine, and General contractor. A red arrow points to a 'Feedback' button in the 'Engine' column of the table. The table also includes a 'Last refreshed 0 seconds ago' indicator.

Search Name	New/Updated	All	Architect	Engine	General contractor
claire personal notes >	-	14	2	3	1