

Release 4.0.7 is now available

In addition to the features discussed below, releases 4.0.6 and 4.0.7 of IntelliPad provide enhanced sorting for standard views such as the Review for the data steward, as well as other administrative improvements.

1. "Holiday Card" - Optional Signature feature

Professionals can designate whether or not they want to sign a Holiday Card, for contacts in their Outlook folder. This feature makes the routing of Holiday Cards for signatures a much more efficient process. Previously, all professionals that have a contact in their folder would be on the routing slip when that contact is designated to receive a Holiday Card. The feature is implemented with a "User Link Caption" text field for events and mailing lists; and it can be used for purposes other than Holiday Cards. With this new feature, the professional is offered an additional checkbox with a description based on the User Link Caption, e.g. "I want to sign it" or "Want to sign Card?".



2. Easier modification of "Primary" Professional for a contact

A new IntelliPad option, if desired by the firm, allows modification of the Primary Professional designation directly on the Outlook Marketing tab. (The Outlook Marketing tab already shows who else knows the same contact and which professional has the primary responsibility for the accuracy of information about that contact.) This change, as is true for all changes, is fully audited with information about who made the change and when the change was made. Previously, this information was set by default when the first professional added a contact to the shared marketing database – and, could be changed as needed by someone with IntelliPad administrative rights.

2. Blackberry Integration, an additional option

Another new IntelliPad option offers the maintenance of all shared contact information into a designated Exchange Public folder. This feature can be used by smaller firms that want to publish all contact information into Blackberry units from this Public Folder. Then, all professionals, at all times, can have access to a full list of contact information about shared firm contacts. Blackberry users in larger firms synchronize their own Outlook contacts to their Blackberry units.

3. Virtual User settings and VCF "drag and drop" automation

Secretaries, as a new "Virtual User" designation, can be set up with rights to use IntelliPad, but only to the extent that they have Outlook Delegate rights to work in a professional's Outlook contact folder. This new feature simplifies IntelliPad administration.

When VCF's are dropped into Outlook Contact folders being monitored by IntelliPad, they now automatically convert to the appropriate contact form.