

IntelliPad CRM Product Development 2007 Through 2017

August 2007

This summary includes IntelliPad CRM development efforts during the first half of 2007. Highlights of the new functionality as listed below are also described in more detail following.

- Holiday Card – optional signature feature
- Easy modification of “Primary” Professional for a contact
- Blackberry integration, an additional option
- Virtual User settings, and vCard “drag and drop” automation

“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. The professional is offered an additional checkbox with a description based on the User Link Caption, e.g. “Want to Sign Card?”.

Easy modification of “Primary” Professional for a contact

A new IntelliPad option allows change of the Primary Professional designation directly on the Outlook Marketing tab, which already shows all professionals who share the contact and which one has primary responsibility for the accuracy of the contact’s information. This change is fully audited with information about who made the change and when.

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.

Virtual User settings and vCard (*.vcf) “drag and drop” automation

Administrative assistants, 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.

January 2009

This summary includes IntelliPad CRM development efforts during 2008. Highlights of the new functionality as listed below are also described in more detail following.

- Automated Data Steward and Data Cleansing
- Efficient Company Address Management
- Other significant enhancements

Automated Data Steward and Data Cleansing

Each firm can choose how to handle automatic acceptance of new contacts and contact changes from Outlook into IntelliPad, in order to minimize the need for “human” review in the People Review function. The Automated Data Steward features enable each firm to fine-tune the automatic acceptance process according to its needs and policies.

New features are: Automatic Accept Rules, Substitution Rules, Text Extension Rules, Alternate Value Rules, and Data Cleansing Rules. These user-defined rules assist the program in matching review records to existing IntelliPad person and company records. Data Cleansing Rules change incoming data so that the database will have consistent values, for example changing “Street” to “St.” or “VP” to “Vice President”.

Efficient Company Address Management

The new Company Addresses table is provided to manage company addresses for IntelliPad person records. If two contacts linked to the same company have different addresses, then that company will have two addresses in the table.

In the Outlook custom form, when users add a new contact or change the company name for a contact: the program searches the IntelliPad database for a matching Company Name. If an existing Company is selected and that Company has more than one known address, IntelliPad presents a list of available addresses for selection.

Other Significant Enhancements

- **Management Menu and Active Users page**

The Management Menu has been completely redesigned with clickable headings for the submenus. The Active Users page replaces the former Home page, providing access to editing of the user records, change of the users' Synchronize and Form Conversion options, as well as access to the Delegates.

- **Increased Exchange Integration for Easier User Management**

Added the ability to select users from the GAL (global address list) on the Exchange server, and to add an IntelliPad person record automatically for a new user; overhauled the User Groups and User Access rights.

- **Primary User Review: more automated acceptance choices**

With automatic review processing only: The Primary User Review web page has choices of "Accept As Is" and "Accept With Changes". "As Is" – eligible for automatic acceptance based on the firm's rules; "With Changes" – will require a manual review.

- **Use interface for code definition and editing**

The user interface has been completely changed, to make it easier to review and edit.

- **Contact Link: an easy cut/paste version of the mailing address**

The full mailing address label is now displayed in one text box at the top of the contact detail page in ContactLink.

November 2009

This summary includes development efforts during 2009. Highlights of the new functionality as listed below are also described in more detail following.

- Contact Activity tracking
- Data Consolidation simplifies data management
- Personalized messages from attorneys for email

Contact Activity tracking

Activity Log: Attorneys can log business development and other significant activities with contacts in Outlook with the new Activity Tracking feature. The logged activities can be used to monitor business development activity, with activity types set up to meet firm objectives.

Data Consolidation simplifies data management

- **Person**

Even with automatic Outlook searches as new contacts are being entered, automated and selected human reviews, and powerful data matching and data cleansing features, occasional mistakes can result in duplicate database records for the same person. This new feature finds possible duplicates by matching on selected data such as email address. The feature then provides a means to manage these possible sets of similar contact records with a manually controlled merge of available contact information. All database links to attorneys, events, mailing lists, and companies are automatically updated and logged.

- **Company**

A new administrative feature allows review of selected companies by searching for "starts with", "ends with", or any part of the name. Within the query results, just by clicking on company names where a duplicate exists in the database, the application deletes the duplicate company data, re-aligns all internal links between the company and related people and company-related addresses. All database updates are fully logged for future reference.

- **Company Address**

Sometimes extra addresses are created in the database because of slight inconsistencies in how they are entered (even though the application shows available addresses for a company when a new person is added – and data cleansing features help to manage this information). All addresses for a company are shown and can be easily modified and consolidated as may be appropriate.

Personalized messages from attorneys for email

When invitations are sent out by email to attorneys' contacts, attorneys sometimes want to add a personal note to the email. This new feature allows attorneys to add or edit that note for an upcoming event in the Outlook contact form (on the IntelliPad marketing tab). They can also add or edit the personal message when reviewing their own list of shared contacts where a checkbox indicates which contacts will be invited.

May 2010

This summary includes development efforts during the first quarter of 2010. Highlights of the new functionality as listed below are also described in more detail following.

- IntelliPad Unicode upgrade
- New IntelliView Queries

IntelliPad Unicode upgrade

Outlook contact information entered in Chinese or Japanese characters, or most other world language scripts, is now supported and correctly displayed in the IntelliPad database, which has been fully upgraded to a Unicode-capable product.

New IntelliView Queries

IntelliPad Query Views and Reports have been renamed from “Prequel” to “IntelliView”. More importantly, the underlying functionality has been rewritten and expanded significantly in the following ways:

- IntelliView does not have any practical limitations on how many tables are used in a query.
- All system views/reports can be used to create firm-specific adaptations.
- The browser support has been expanded from being limited to Internet Explorer to embrace, at minimum, Firefox and Chrome.
- On-screen query results are easier to read with improved formatting.
- Queries now complete a lot faster because of improved internal methodology.

January – November 2011

This major release includes over a year of development work. There were interim small releases to add requested features and to make corrections where needed. Highlights of the new functionality are summarized below and described in some additional detail following.

- New Outlook form: IntelliPad Add-in
- IntelliMap for Outlook contacts
- Contact Import
- Filter by View in Add Links
- Email notifications to users
- Link Management utilities
- Contact, Company, and Outlook Duplicate Removal
- Primary User Review
- Outlook Searches Log

New Outlook form: IntelliPad Add-in

This release introduces a new design of the IntelliPad features used in Outlook. The IntelliPad Add-in program uses the standard Outlook form and adds “regions” to it—IntelliPad General, Marketing, and IntelliTab. It can only be used with Outlook 2003 and above. The purpose is to enable users to take advantage of newer Outlook features such as contact pictures, business cards, and ribbons. These new features are not supported by the old “legacy” form, which is a replacement for the Outlook form built with older technology.

IntelliMap for Outlook contacts

This feature provides, on the “IntelliTab” page, the ability to do Google searches on the contact and company names, and to display the Google map of the company address (and home address if present).

Contact Import

This feature supports data replication of contact information from sources other than Outlook. There is a new “Contact Import” heading on the Management Menu, containing all programs. Contact data can now be imported from a comma-separated values file. The Import Contacts program treats these contacts as if they had come from Outlook, so all features associated with regular review record processing are applicable. There is an Imported Changes log. Contact records with errors are identified by the import program; an Editor is provided so these contacts can be corrected and re-processed (or deleted).

The import program includes the new ability to link users to a new or existing contact, so there are new Site Settings to determine how the export program finds and handles potential duplicate contacts in Outlook. The program also links the imported contacts to Events and Mailing Lists, if any. All contact records now have a Source designation - Outlook or Contact Import - shown in the review detail page and in the resulting person records.

Filter by View in Add Links

The Add Links function now includes a filter choice of “IntelliView”, so that users can link the records in a selected View to an Event, Company, Task, or Person. Examples of Views: People added this month, People with Zip Code 85710, Companies with Category “Real Estate”.

Email notifications to users

Any type of message can be sent, from the IntelliPad web interface, to all or selected Outlook users at any time. For example: meeting reminders, notifications about system maintenance, etc.

Link Management utilities

There is a new “Link Management” heading on the Management Menu. For IntelliPad links, all link types can be searched; invalid links will then be removed and missing links will be created. For Outlook links, the OutlookIDs table can be rebuilt, followed by a search by user; invalid links will then be removed, missing links will be created, and invalid CreatedByID values will be corrected.

Contact, Company, and Outlook Duplicate Removal

The Contact and Company Removal utilities provide deletion of multiple inactive contacts, or companies, at one time. Selection is by link types that the contact or company does not have, and by creation date range and/or last modified date range. Outlook Duplicate Removal provides a search for duplicate contacts by user. Each removed duplicate is moved from the user’s Outlook folder to the Deleted Items folder. The program retains the oldest link, based on creation date, and removes the extraneous person-user link from the Person-Person links table.

Primary User Review

Additional Site Settings for the Primary User Review feature:

- Primary’s changes to his/her own contacts can be not subject to review
- The Time Limit can be specified in days or weeks
- With use of “allow full editing”: Features available on the Edit Contact Detail page can be restricted

There is a new online help file for Primary User Review, opened from both the Primary Review Web page and the Edit Contact Detail page.

Automatic Log Purging

New Site Settings determine the number of days each log type is kept online. Data and Link Changes logs are not available for automatic purging.

Outlook Searches Log

This log provides information on searches that were done by users either in Outlook or in Contact Link, with selection by search type Person, Company, Person-Company, or All. A new Site Setting activates this feature. Attorneys can see who searched for their contacts.

January – December 2012

This summary includes IntelliPad CRM development efforts during 2012. There were interim releases to add requested features and to make corrections where needed. Highlights of the new functionality as listed below are also described in more detail following.

- Google News for Company, Person, or both
- Driving Directions to Contact Company
- “Mail Type” with Notes for Preferences and Unsubscribes
- Prior Company and/or Additional Company Information
- Daily Outlook Search Log Emails for Primary Attorneys
- Juris Financial Data Automated Import
- Attorney Visibility of Firm-wide Contact Participation in Mailings

Google News for Company, Person, or both

In addition to the available IntelliPad Google name searches, IntelliPad now also offers the opportunity to quickly search for News. This feature is located on the IntelliMap page.

Driving Directions to Contact Company

This feature is located on the IntelliMap page. IntelliPad uses the office address of the attorney as the starting location, unless it is changed.

“Mail Type” with Notes for Preferences and Unsubscribes

Contacts can now have a Mail Type of Email and Letters (default), Email Only, Letters Only, or No Mail. Exceptions can optionally be allowed. A Mail Type can also be assigned to an Event or Mailing List. The Mail Type determines which kind of mail task each contact may be included in. If a contact has exceptions allowed, then a different Mail Type can be used—for the Event or List itself, or as overridden by respective professionals for a contact.

Prior Company and/or Additional Company Information

If a contact’s primary company is changed, whether in Outlook or IntelliPad, the link to the former company can optionally be kept every time the company is changed. This information is visible, and can be added or changed, in Outlook. Additional Companies can now be recorded for contacts in Outlook.

Daily Outlook Search Log Emails for Primary Attorneys

If activated: This new menu selection provides a report of contact searches done, by other attorneys or staff, in both Outlook and ContactLink. An optional daily summary of detailed views and/or downloads of contacts can be emailed to professionals for contacts for which they are designated as the Primary User. Or, Primary Users can look-up the search history about their own contacts.

Juris Financial Data Automated Import

IntelliPad offers a Business Information Financial summary in Outlook which can be used to see a snapshot of the client-level economics related to each contact. Typically this information is updated daily and can be seen within Outlook for each client-related contact. The most recently completed integration is for Juris.

Attorney visibility of firm-wide contact participation in Mailings

IntelliPad has always enabled professionals to easily manage participation of their contacts in any upcoming mailing or marketing event. One click in Outlook brings up a browser view where they can select an event or mailing and see all of their contacts, with a check to indicate the ones included. Marketing staff can send an email to all professionals, containing a link for a new event or list; one click in the email message takes the professional to the browser page with the new event or list pre-selected. They can now also see, for any selected event or list in the browser view, all firm contacts who are participating. Both lists can be sorted by contact or by company.

January 2013 – February 2014

This summary covers the releases provided in 2013 through February of 2014. Highlights of the new functionality are summarized below and described in some additional detail following.

- Constant Contact Email Integration – including automated response tracking
- IntelliPad Mobile Access – smartphone and tablet access (with security) to shared contacts
- Business Development – management of recurring communication for key contacts
- Automated User Setup from an Import Table
- Feature Visibility Control - for selected Outlook Users
- Juris Accounting Data Import – for user-selected visibility in Outlook

Constant Contact Email Integration

Versys Software has partnered with Constant Contact, the premier web mail service provider with over 500,000 clients world-wide, to provide more email services to IntelliPad clients. By using Constant Contact together with IntelliPad to send out email campaigns, your firm avoids exposing its own URL for possible designation as a source of spam. IntelliPad automatically communicates with Constant Contact servers from your server to update contact information and email campaign participation and to pull back email response information for Opens, Bounces, Forwards, and Opt-Outs.

IntelliPad Mobile Access

While travelling to another city, it would be convenient for an attorney to see all of the shared firm contacts in that city, look up contacts by name or company name, and then be able to call on the phone or send an email with a single-click, see a map of their location, or check with another attorney in the firm for a question about the contact by phone or email.

The optional IntelliPad Mobile phone access fulfills all of these needs and more. It does not require an application installation and works on both Android and iPhones, utilizes Windows Authentication, allows control over what each user can see (firm attorneys only, their own shared contacts, or all shared contacts), and is fully audited as are all other accesses to the IntelliPad CRM database. Additional information includes participation in firm mailings and marketing events, shared notes, and business development activities.

Business Development

Important contacts need frequent attention and less critical contacts need attention periodically. The strategy of entering a follow-up date for a contact on a calendar is only efficient when the activity is accomplished exactly as planned. That is often not what happens, so the calendar entry has to be moved to a new date.

With IntelliPad Contact Follow-up Management, all of this becomes a lot easier. For each contact, attorneys can set the frequency of how often to communicate. IntelliPad provides a means to log follow-up activity and provides periodic email notifications to each attorney for follow-ups that have not occurred and for follow-ups that are planned for the near term. Each contact in Outlook also displays a history of how each follow-up was done and allows the attorney to be creative in how the next follow-up is accomplished. Attorney notification emails for follow-ups can be redirected to respective administrative assistants so they can work with attorneys as business development teams. With IntelliPad mobile phone access, follow-up information is also included for each contact. This business development activity can be shared with all attorneys, selected attorneys, or kept private between the attorney and the marketing department.

Automated user setup, from an Import Table

To facilitate larger clients, IntelliPad now provides the needed documentation and can automatically import new users from a SQL table populated by a local inter-application utility or other process.

Feature visibility control

The Business Information feature, which shows client-level accounting information in Outlook, now can be turned on or off for selected attorneys (typically, only partners are allowed to see this information). The Business Development functionality in Outlook can also be selectively turned on or off for individual attorneys (this is helpful in rolling out the capability to the firm on a departmental basis).

Juris Accounting Data import

On an automated recurring basis, Juris client-level accounting information can be pulled into the IntelliPad client summary table for viewing in Outlook by authorized professionals (in the Business Information view as mentioned above).

June – December 2014

This summary covers the releases provided in the second half of 2014. Highlights of the new functionality are summarized below and described in some additional detail following.

- The IntelliPad Outlook contact form was updated to work in Outlook 2013 (and Exchange 2013)
- A new type of mail task outputs a file of selected contact data for upload to any webmail service provider
- Added “Mail Type Source” and “Mail Type Note” contact data fields, for use by firms required to show permission from contacts and clients to receive emails or mailed materials
- New “Mail Actions Import” functionality, to import mail-related information for contacts
- Contact, and Company, Consolidation by “Duplicate Grouping” for easier identification of duplicates
- ContactLink and IntelliPad Mobile: More detail in name and company popups, one click access to Google maps
- A new processing rule for automatic acceptance of new contacts is designed to catch more potential matches already in the IntelliPad database
- New tools added to the data steward’s review page, to assist in finding potential matches when accepting new contacts
- Additional management logs provide more detailed troubleshooting

New type of mail task outputs file for upload to webmail service provider

In a “Data Source Email” task, for a selected Event or Mailing List, all contact data fields are available for selection and inclusion in the output file. More choices are provided for selection of the linked contacts to include in the task, such as Contacts not yet included in any mail task.

The output file can be viewed from within IntelliPad, and can be uploaded to the website of any webmail service provider, according to the provider’s instructions.

Added “Mail Type Source” and “Mail Type Note” contact data fields

These fields are for use by firms required to show that contacts and clients have given permission to receive emails or mailed materials. Use of these fields is optional; they can be ignored by firms not required to show permission. There is a Source Codes table for user definition of the Source Codes to be used; the Note is a text entry. Default values can optionally be set for all Mail Type fields, to be automatically entered for all new contacts added in Outlook or imported.

The Mail Type fields can be shown or hidden in Outlook. If shown, access to changing them can be prevented (i.e. when the default values are used).

New “Mail Actions Import” functionality

Data is imported from Excel worksheets or comma-separated values files. IntelliPad provides a detailed guide to the column names, and the type of data or specific data values required in each column. There is a log for each import procedure. Mail Actions that can be imported include:

- Mail Type field values
- Links to Events and Mailing Lists
- “Sign card” links for attorneys (e.g. for the Holiday Card mailing list)
- Override Mail Type values for specific contact-Event or contact-Mailing List links (if allowed)

- “Mail Actions” from a webmail service provider’s tracking report, in response to emails sent (e.g. Open, Bounce, OptIn, OptOut)

Contact, and Company, Consolidation by “Duplicate Grouping”

This feature provides the ability to search for possible duplicates using name and email, or company, fields with a specified letter range and number of letters that must match exactly. In Contact Consolidation, the First Name, Last Name, Email1 Address, and Company ID fields are available for use. For the names and email address, the user specifies the range of letters from A to Z as well as the number of letters that must match exactly. For Company ID, just a number range is needed.

In Company Consolidation, the letters A to Z and number of letters that must match exactly are specified for the Company Name only.

ContactLink and IntelliPad mobile: more detail and one click access to Google maps

The contact detail window, opened from ContactLink and IntelliPad Mobile, now includes Activity Log (Business Development) entries, Linked Attorneys (with Email link), Linked Events, Linked Mailing Lists, Past Events and Categories. Both contact and company detail windows include Created and Last Modified information. In both windows, placing the cursor over any address makes it clickable to open the Google map.

New processing rule for automatic acceptance of new contacts

Not all firms use automatic acceptance of new contacts, from Outlook or imported. The new “IntelliMatch” rule is designed to catch more potential matches already in the IntelliPad database and thus avoid creation of duplicates. It consists of a 4 step process; in each step, the program uses a different group of data fields to try to find a match:

- Email1Address and LastName
- FirstName, LastName, CompanyName
- FirstName, MiddleName, LastName
- FirstName, LastName, MailingAddressStreet

New tools added to the data steward review page

These are intended to assist in finding potential matches when accepting new contacts—either because they have failed the firm’s automatic acceptance rules OR if automatic acceptance is not used. In the Research window:

- The contact and company names are clickable to open the read-only detail popup windows.
- The Show Change History column includes links to the Contact, Review, and Company logs.

The Contact and Company links open the standard Changes window, with choices of Data Changes, Link Changes, and Company Name Changes; the Review link opens the Reviewed Changes log (history of new contacts/contact changes accepted from Outlook or imported).

Additional management logs provide more detailed troubleshooting

- Batch Cycle Messages
This log accumulates application trace messages for a single cycle; it is cleared with the start of each cycle.
- Outlook Tasks
This log records IntelliPad task processing that changes Outlook Contacts folders and Outlook contact records. For example: Company Name Change, Convert Forms, Outlook Duplicates, and Removed Shared.
- Application Trace Messages
This log is activated in the Registry Settings. It records detailed processing messages from IntelliPad COM+ Applications and the web interface.
- Application SQL Trace
This is not a separate log; but when activated in the Registry Settings, all the programs’ SQL statements are included in the Application Trace Messages log, making it huge. This should only be activated for specific research purposes.

Partial listing of other changes and additions

- Outlook and IntelliPad: The Data Changes and Link Changes logs show the first 50 entries only; a “Show All” link is provided so the user can view more entries if desired (log entries are sorted by descending date).
- Outlook and ContactLink: “No Mail” contacts show a red text “Opt Out” if they are linked to an Event or Mailing List.
- Outlook, Activity Log display: Added an option to show or hide completed entries by default.
- IntelliPad: People Add Links filter includes option to “Include Users”.
- IntelliPad: Added a utility to create a company record from a Custom field number value, and link it to selected contacts.

January – December 2015

This summary covers the releases provided in 2015. Highlights of the new functionality are summarized below and described in some additional detail following.

- ContactLink: Ability to link contacts to multiple events and mailing lists in one pass; ability to link all an attorney’s contacts to an event or mailing list
- Outlook: Optional requirement to link one event, mailing list, or both for all new contacts
- IntelliPad Mail Manager: Provides access to managing the contact links and Holiday Card signatures; provides history of mail tasks; includes entry of new user-defined Response Codes and optional Response Note for linked contacts
- IntelliPad Review page: Added ability to show records awaiting Primary Attorney review
- Added logs for Mail Actions and Consolidations; and new “Application Statistics”
- Added the ability to have separate schedules for the release of IntelliPad emails to the administrator, and to attorneys/assistants
- Automatic import of contact, and/or mail actions, information on a regularly scheduled basis

ContactLink: Multiple Events and Lists, and Link All contacts

In the new “Multiple” menu selection, users can select any number of Events and Mailing Lists, and then link all, or specific, contacts to them in one pass. The “Link All Contacts” feature has been added in the Events and Mailing Lists menu selections, and is also present in the multiple detail page (can be restricted to authorized users). Link All Contacts has an associated filter by Mail Type. If one of the selected Lists has a “Sign Card” box, it will be included so the attorney can check that box if desired.

Outlook: Optionally require at least one Event, Mailing List, or both

If required, the user will not be able to save a new contact without going to the Marketing page and linking an Event, Mailing List, or both. A user-defined prompt popup will explain the restriction.

IntelliPad Mail Manager

There are several major enhancements to this menu selection, used to create mail tasks for selected Events and Mailing Lists, to link more contacts to the Event or List, and to record contacts’ responses.

- Large list of linked contacts not shown at the top; the number of linked contacts and a “Show All” link is provided
Speeds up the display, because the list need not be shown for creation of mail tasks or any other functionality except adding contact responses.
- Provides access to managing the contact links, and Holiday Card signatures

The “Manage People Links” page shows the linked contacts from all attorneys; a specific attorney can be selected. Contacts can be unlinked, and an Override Mail Type and/or Address Type can be added. With specific attorney display, contacts can be linked. For the Holiday Card Mailing List, the “Sign” box can be checked or unchecked for the contacts’ linked attorneys, and, if present, the User Text (e.g. “My Comment”) can be added.

NOTE: Access to the Override Mail Type fields can be restricted (they will be grayed out)

- History (of mail tasks for Event or List) available to view, by Contact or by Date

- User-defined Response Codes and optional Response Note can be added for each linked contact

Creation of mail tasks (any type) now provides selection of linked contacts by Response Code, e.g. “Contacts who have responded ‘Yes’”. Response Codes and Notes can be imported with other Mail Actions.

IntelliPad Review Page: Ability to show records awaiting Primary User review

The IntelliPad data steward’s review page now provides display of change review records that are awaiting Primary User review. A button opens a popup window showing the submitter names, dates and times, contact names, and changes.

Added logs for Mail Actions, Consolidations, and new “Application Statistics”

The Mail Actions log can optionally be shown in Outlook on the Marketing page (i.e. for each contact).

The Consolidations log offers choice of People, Company, Company Addresses, or all types.

The Application Statistics log provides statistics on both Outlook and IntelliPad contacts, for one or multiple months and for all users or a selected user. Sorting can be By User By Period or By Period By User. The contents can be printed or exported to a csv file. Outlook information includes number of contacts added, shared, linked to events and lists, searches and matches. IntelliPad information includes number of recurring activities, and data and link changes. Firm totals are provided at the end.

Ability to have separate schedules for the release of IntelliPad emails to the administrator, and to attorneys/assistants

Emails from IntelliPad can now have separate release schedules depending on their addressees. For example, emails to the Administrator (address from the Site Setting) can be sent daily. Emails to all other recipients (i.e. attorneys and assistants) can be sent once per week.

Automatic import of contact, and/or mail actions, information on a regularly scheduled basis

New contacts and contact changes, mail actions, or both can be imported automatically on a regularly scheduled basis. The firm must develop a procedure to get the information into the IntelliPad temporary tables—interested firms please contact Versys.

Partial listing of other changes and additions

- Outlook: Show a warning if the user removes the company name and does not replace it; IntelliPad Review: Show a warning if the Outlook user has removed the company name
- IntelliPad Events: Create duplicate Events with or without the copied one’s contact links; manage contact links from the Edit Event page
- Pending email tasks are listed at top of the Mail Manager selection page
- Added a utility to remove empty lines from address blocks
- IntelliPad: If there are more than 50 items in any list (e.g. links, or people to be linked), only the total number of items is displayed with a “Show All” link for the user to open, when needed

January – October 2016

This newsletter covers the releases provided in 2016. Highlights of the new functionality are summarized below and described in some additional detail following.

- Summarized emails from IntelliPad to attorneys, with user-defined content and frequency, and new IntelliPad Review Summary report
- “Non-Outlook” links between attorneys and contacts
- Edit Activity Log entries directly from the Open Activity Report
- Enhancements in IntelliViews: Additional filter conditions, ability to prompt on a text field, user-defined prompt captions, and suppression of repeated column values
- Email mail task: One email, per recipient, from multiple linked attorneys
- Email Marketing Automation for Event Responses and Subscription Management

- Contact Link: Search by Categories, add contacts to Non-Outlook Links, optionally show Application Statistics Graphs and selected IntelliViews
- IntelliPad Mobile App: Add contacts to users' Outlook folders
- Custom fields for events, tasks, and users
- Optional purchase Case Management module

Summarized emails from IntelliPad

The Email Notification scheduled task now has additional parameters for frequency, summarization strategy, and inclusion of users by Group or Access code. The summarization strategies enable consolidation of 2 or more emails into a single email to an addressee. So for example, a summarized email can be sent weekly to each User Admin user, but once every other week to each user with no Access code or Group (i.e. attorneys or their "notify email" persons). The summarized email contains links to each specific email report.

The Review Summary Report contains new contacts or contact changes, submitted in the past 24 hours, and not yet accepted in IntelliPad. It also contains an "aged summary" of all review records, submitted by the user, that are awaiting acceptance. Only the numbers of records are shown, no names. This report will be included in Summarized Emails, if used.

"Non-Outlook" links between attorneys and contacts

Non-Outlook links can be added in IntelliPad, in ContactLink after searching for contacts; and can be imported with contact information from CSV files. All IntelliPad functionality, such as linking to Events and Mailing Lists, can be done for Non-Outlook contacts in both IntelliPad and ContactLink.

Edit Activity Log entries directly from the Open Activity Report

An "Edit Business Development Activities" link can optionally be placed at bottom of all Open Activity Reports. Users will click this link to go to an edit window where they can edit all log entries, from all contacts, that are included in the report.

Enhancements in IntelliViews

- New filter conditions: "Find All" or "Find Any" -- by comma, semicolon, or space
- Other filter enhancements:
 - By text field, e.g. Public Notes
 - User-defined prompt caption specified in the filter
 - The Value can be another column, instead of a literal—to compare the values in two different columns
- Display: Redundant column values suppressed from left to right, "go to" letter selection added for navigation
- Export to CSV, Excel; or Print: There is a popup prompt to suppress redundant values
- IntelliViews made available in ContactLink, for authorized users only

Email mail task: One email, per recipient, from multiple linked attorneys

If an email invitation or card recipient has multiple person-event-user links for the event or mailing list (i.e. a "Sign" or other caption box for attorneys to check): Just one email can be sent, with a "From" value of All Linked Users, and with the merge field "AllLinkedUserNamesAndText" in the message body, to show each attorney name with his/her personal message to contact from the event or list link details.

Email Marketing Automation for Event Responses and Subscription Management

There are two features: Email Invitation Automated Response Tracking, and Email Subscription Management.

- Email Invitation Automated Response Tracking

A URL can be embedded in the email message, to provide either a button or a clickable link to an external webpage. This can be used with emails sent directly by IntelliPad, or using Constant Contact or other email service providers. The recipient clicks the button or link in the email to go to the webpage, where there can be an RSVP option plus options for choice of meal type. Data from this webpage can be imported into IntelliPad.

- **Email Subscription Management**

A URL is embedded in the email message, as described above. A new merge field, EncodedEvents, contains the list of all past and future events, and mailing lists, each recipient is linked to. This information is passed to the designated webpage, for example the firm's Subscription Management page, where it can show the recipient their own subscriptions and allow them to add or remove publications or Alerts topics as provided on the page. Data can be imported into IntelliPad.

Enhancements in ContactLink

- Added the ability to search by Categories
- After search: Add contacts to users' Non-Outlook links
- Optionally show Application Statistics Graphs for User, and selected IntelliViews by authorized user

IntelliPad Mobile App: Add contacts to Outlook

The feature is activated in a Site Setting. In the Contact Detail, at bottom of the Contact display area, there is a link "Add to My Outlook Contacts" if the contact is not already present.

Custom fields for events, tasks, and users

Custom data fields can now be defined for events, tasks, and users (i.e. as well as for people and companies). When fields exist, there will be a "Custom" button in the edit page, e.g. Edit Event.

Optional purchase Case Management module

This application, available for separate purchase, provides a new type of Event (Case Management). When purchased, the Edit Event window allows creation of Case Management Type events and the IntelliTab page of the Outlook custom form and Add-in can be configured to show the IntelliPad - Case Management content. Contacts are linked to the Case Management Events in Outlook on the Case Management page.

April 2017

This newsletter covers the first release provided in 2017. Highlights of the new functionality are summarized below and described in some additional detail following.

- Contact Restriction by Primary Attorney
- Relationship Strength for contact-attorney links
- Template messages in Email Mail Tasks
- Multiple events in notification emails to attorneys
- Enhancements in ContactLink: Past Events filter by Response Code, export and print Views
- Non-Reviewed fields in Review Detail page
- Custom Field Groups
- Custom fields for Activities
- Support for ActOn® webmail service provider

Contact Restriction by Primary Attorney

In Outlook, there is a new optional checkbox for "Primary Restriction," available for new contacts only. If checked, other users will not have any access to the contact, for example when searching in ContactLink or the IntelliPad Mobile application, or when running Views in ContactLink. After the contact is saved, the checkbox is disabled—it may not be unchecked, but the contact may be unshared or deleted.

In IntelliPad Edit Person, there is a red text warning at top of page that a contact is Primary Only. Administrative users may delete PO persons or remove the PO restriction, but these contacts are automatically filtered out of selections in Contact Consolidation and Change Primary User.

Relationship Strength for contact-attorney links

There is a new Relationship Strength codes table, for optional creation of codes to describe the relationships between attorneys and their contacts. An RS code can be entered in Outlook, ContactLink, or IntelliPad Edit Person. The RS code can be different for each of a contact's linked attorneys. The RS code can be shown or hidden on the Outlook Marketing page.

Template messages in Email Mail Tasks

An email message can now be saved as a template, and used over and over. The message can contain all formatting, graphics, URLs, marketing automation features, encoded fields, People table variables, and prompts to be shown when the template is loaded in the future, i.e. for variable information such as Event Name, Date, Time, and Location.

Multiple events in email notifications to attorneys

The new Notify menu selection, in Events, enables users to select multiple Events and Lists for attorney notification. There is no need to edit a specific Event in order to send a notification. When the recipients click the link in their emails, the ContactLink Multiple Events/Lists feature opens, with pre-selection of the events and lists included in the Notify email.

Enhancements in ContactLink

- Past Events filter by Response Code: The filter choices are all the defined Response Codes. The result listing includes the Response Texts if any.
- Export and print Views: "Keep Line Breaks" means there will be separate lines in the file as in the View, e.g. a line for each contact name linked to the company. "Remove Line Breaks" means that the values will be merged into one cell with separation by semicolons.

Non-Reviewed fields in Review Detail page

This new feature, in the Contact Detail section, opens a window showing all non-reviewed field and Marketing page values, from Outlook or imported, for new contacts. For example: Category, Contact Type, Referral, Activity log entries, linked Events and Mailing Lists.

Custom Field Groups

Custom Field Groups can be defined for all entity types, including Activity Log and Users. Custom fields are then assigned to a Group, which determines the fields shown by default in the Custom entry window. The People Custom Group can be assigned to a contact when added in Outlook, or in IntelliPad Edit Person, or can be imported.

Custom Fields for Activities

Custom fields for Activities can now be defined, as well as Custom Field Groups for them. The custom fields can be shown right in the entry window, or there can be a Custom button to open the popup window. If the popup window is used, there is a Filter By choice for selection of the Custom Field Group, which just determines the fields displayed.

Support for ActOn® webmail service provider

This is optional, available for a slight addition to the IntelliPad monthly maintenance fee. When present, there is an ActOn mail task type in the Mail Manager. Linked contacts are uploaded to the selected draft on the ActOn website; feedback data is periodically downloaded, into IntelliPad tables, from the ActOn site, e.g. emails Opened, Bounced, OptIn, OptOut.