

IntelliPad CRM Product Development in 2018

There were two IntelliPad releases in 2018: 7.0.0.1 (June) and 7.0.2.1 (October).

Release 7.0.0.1

Release 7.0.0.1 provides support for a new feature and service for IntelliPad Marketing Automation Landing Pages. Major enhancements are provided for Mailing List Management, Linking of Contacts to Events and Lists, Contact Changes Review, ContactLink, and a new and faster integration with Constant Contact. Support for the Emma® webmail service provider has also been added. There is a new Outlook Add-in, release 1.1.5.0. To see more information about the Marketing Automation Landing Pages features and the related service, click the following link:

<http://intellipadcrm.com/intellipad-landing-pages/>

Enhancements in the web interface

- **Manage Event Links in Edit Person**

The new feature enables users to link the person to multiple Events and Lists with selection of link details and with checking a “Sign” box and adding a text for linked attorneys where applicable.

- **Edit Events features**

- Option to automatically check the “Sign” box when the contact is linked (also affects Outlook and ContactLink)
- Option to allow use of IntelliView filters in ContactLink, for selection of contacts to link to Events and Mailing Lists
- Option to allow the Event on custom Landing Pages, e.g. for RSVP or for Subscription Management
- Add Links feature moved into the Manage Links window
- Event duplication, person-event links: The Comments, Categories, Override Address, and Override Salutation can be included. Person-event-attorney links (i.e. card signers): The User Text (personal messages) can be included.

- **Mailing Lists: End Date**

Mailing lists can now have an End Date. The Past Mailing Lists section can optionally be shown in the Outlook Marketing page, and there is a new menu selection for them in ContactLink. They are included in the Mail Manager main selection window, in the IntelliPad web interface, so users can review the contacts that were linked to them.

- **Mail Manager, Manage People Links**

- Automatic opening of link details when Mail Type Override is required (i.e. yellow link box—contact has No Mail with Exceptions Allowed).
- Automatic check of “Sign” box when contact is linked to an Event or Mailing List: This is a new option in the Event definition.

- **Custom fields for Person-Event Links**

These fields can be defined for Events, Mailing Lists, IntelliPad Only, or any combination. They can be included in IntelliViews. Fields can also be defined for Case Management links, if this module has been purchased (as cases are setup as Events in IntelliPad).

- **Mail Task features**

- People Selection by “signers” – contacts that have at least one person-event-attorney link.
- All Email Mail Task types, Duplicate Email Errors: New option to report duplicate email addresses as errors; contacts with duplicates must then be removed before the task can be created.
- All Email Mail Task types: New Landing Page fields added for creation of a URL to provide a clickable link in the message, so that recipients can click it to go to a designated “landing page” on the firm’s website, e.g. to RSVP to an Event they have been invited to.
- DS Mail Tasks: MailingAddressLabel field name changed to “Salutation”; new fields added for “Salutation or FullName” and “Override Salutation or Full Name”.
- Mail Task Exceptions: The total number of duplicate email addresses, and of other errors, are shown at top of the page.

- **Contact Changes Review features**

- Consolidation of review records for same contact

Multiple review records for the same contact, from multiple submitters, can now be consolidated. A review detail page shows all values, from all submitters, with selection of the field values to be saved.

- Accept Selected/All processing done by scheduled task (i.e. in “background”)

Reject Selected also. Clients can specify the frequency of this task, e.g. every 10 minutes. The new “Processing” button opens a display showing the review records included; the button changes to “Results” upon completion.

- **Find View button in all Manage Views screens**

This button enables users to search for a View by words in the description.

- **Contact Consolidation, empty fields**

If the user is leaving some fields empty, but there are values for those fields in the other contacts being consolidated: A warning window shows the field names with empty values.

- **Consolidations Log display options**

New options added for display of Detail or Summary, Sentence or Paragraph format, and Show or Hide field changes.

- **Application Statistics log:** Provides selection of multiple users

- **New User Notifications log**

Includes Event notifications to users, general user notifications (from Management menu, Users), and all notifications logged by the ColdFusion code.

- **Administrator notification if CFBatch process has stopped**

If the CFBatch process has not run for more than 24 hours, an email is sent to the Administrator and an entry is logged in the Application Messages log, Other.

- **Multiple Administrative Email addresses**

The Site Setting can contain multiple addresses for the Administrator, separated by semicolons. The Notifications task can be setup to send emails to these addresses based on each user’s access rights, i.e. so different users receive different notification emails.

- **Edit User features**

- Prompt on change of Active to “No”

A prompt informs the user of the difference between changing the Active value to “No” and deleting the user, and explains the processing choices available with deletion.

- Exclude from Application Statistics

This new option lets the attorney be excluded from the Application Statistics log and graphs. This feature is also available in Add Users from GAL (i.e. when multiple users are being added at one time).

- IntelliView Filters

A new Filter button opens a window for selection of IntelliViews that the attorney can use to filter contacts for linking to Events and Mailing Lists in ContactLink. This feature is also available in Add Users from GAL.

- **Mail Actions Import**

- Create a comma separated values file for unrecognized contacts: This new option is provided in the Mail Actions Import page. The .csv file so created can then be imported. This is useful when clients are importing a large number of contacts with mail actions, but some of these contacts might not yet exist in the database, or might be duplicates with different name spelling or different company name.

- Company name match option: Users can specify the number of characters to match when finding contacts by name and company name because the email address does not exist.

- **Batch Add to Outlook utility**

This new utility offers selection of multiple person records for adding to an Outlook user's folder; for example, person records that were imported but with no linked users in the comma separated values file.

- **Convert Non-Outlook Links to Outlook Links utility**

This new utility offers selection of multiple users, with optional selection criteria for contacts (SQL query). The process adds the formerly Non-Outlook linked persons to the users' Outlook folders, and changes the link type in IntelliPad.

- **Constant Contact**

- New interface provides bulk upload if there are more than 70 contacts
- Changed the Settings to work with the new option tables

- **Emma interface**

As with Constant Contact and ActOn: The Mail Manager has a new Mail Task type for Emma, with upload of contacts to a draft campaign on the Emma website, and download of statistics to IntelliPad tables after the emails have been sent. Interested clients: Please contact Versys for more information.

- **Custom “landing pages”, within firm’s web page, that update the IntelliPad database**

This is a custom feature available for purchase. There can be custom “landing pages”—for new contact information, subscription management, and event RSVP—implemented within the firm's web page. Email Mail Tasks (all types) have an added section for creation of the URL for the clickable link to be placed within the recipients' messages. The new IntelliPad API updates information from these landing pages to the IntelliPad database. These pages will be available from smart phones. Interested clients: Please contact Versys for more detailed information.

Enhancements in Outlook Marketing page

- **IntelliMap feature changed to a link**

IntelliMap will no longer be located on the IntelliTab page. Instead, there will be a link to open it in the IntelliPad General area. (Shared contacts only.)

- **Case Management section (optional purchase)**

If purchased, “Case Management” will be activated in the Site Settings and displayed below Basic Marketing Information. Custom Person-Event link fields can be defined for use in this section only. This feature enables attorneys to link contacts to specific cases.

- **Custom Person-Event fields in link details**

These can be defined for use in Event, Mailing List, or both types of link details in Outlook. For example: Meal Selection, Topics of Interest, Type of Business, Monthly or Quarterly Subscription.

- **Automatic check of “Sign” box when contact linked to an Event or Mailing List**

A new option in the Event or Mailing List definition provides this feature.

- **Automatic opening of link details when Mail Type Override required**

When a contact is linked but a Mail Type Override is needed (i.e. yellow link box—the contact has No Mail but Exceptions Allowed), the link details open automatically.

- **Email to administrator for users not authorized to link or unlink**

Optional: When a user tries to link or unlink a contact, but the link boxes are red (i.e. No Mail No Exceptions) or gray (i.e. not authorized for this contact), a prompt asks if they wish to send an email to the administrator. If Yes, the email window opens and they can write any message and send it.

- **Past Mailing Lists**

Since Mailing Lists can now have End Dates: This section can optionally be included on the Marketing page. As with Past Events, users can see the link details for all contacts, if any.

- **Activity Log entries are sorted in descending date order (both current and future)**

Enhancements in ContactLink

- **Added contact search by email address**
- **Additional data display options in Events, Mailing Lists, and Multiple Events/Lists**

Job Title, Email, and Mailing Address options are available, both in the main selection page and in the contact list pages. The chosen data values will be shown for every contact.

- **Filter contacts by IntelliView in Events, Mailing Lists, and Multiple Events/Lists**

Each attorney's authorized IntelliViews are set in the IntelliPad user record. (Allowing this filter is a new feature in the Event definition.) After choosing an Event or Mailing List, the attorney can choose an IntelliView to filter contacts by.

- **Custom Person-Event link fields**

Custom Person-Event link fields can be defined for Event, Mailing List, or both types of link details; they are available for data entry in ContactLink. Examples: Meal Selection, Bringing Guest, Subscription Type, Topics of Interest.

- **Person-person links shown in the new Other Contact Links section in the contact detail window**

This means links between contacts, and is also true in the IntelliPad Mobile App.

- **Company Contacts listing:** Added the ability to show or hide details of linked users (i.e. attorneys)
- **Print button added in Show My Links and Show All Links windows**
- **Past Mailing Lists menu selection added**

Mailing Lists can now have an End Date. Users can view their contacts that were linked, with the link details if any.

Release 7.0.2.1

The purpose of Release 7.0.2.1 is to support the use of Lucee with IntelliPad, including the Constant Contact interface. Technical changes made are for this purpose. There are three changes unrelated to Lucee, as follows:

- Changed Mail Actions and Contacts Import to try using "," as a separator for events and users lists. The "," is used if all the elements of the list are numeric, otherwise the ";" is used. For example, the Users column can contain a list of User IDs such as "6,10,25". Or, it can contain the names such as "Lynda Hendrell;Mark Rogers;Jean Smith."
- Set a limit of 20 columns per IntelliView report
This is intended for Export to Excel or to CSV, not for viewing onscreen.
- Added "contains all" and "contains any" choices to the filter capabilities of IntelliView

The argument is a comma or semi-colon delimited list of values to find in the field. For example: A "contains any" filter value of "chief,president" (or "chief;president") would find contacts with a Job Title value of President, Chief Executive Officer, Chief Financial Officer, Chief Operations Officer, Chief of Staff, or President and Chief Executive Officer, etc. The "contains all" filter with the same value would only find contacts with the Job Title value President and Chief Executive Officer, President and Chief Operations Officer, etc.