IntelliPad CRM Product Development in 2019

There were two IntelliPad releases in 2019: 7.0.3.1 (March) and 7.0.4.1 (September)

Release 7.0.3.1

Major enhancements in Release 7.0.3.1 include: The ability to link contacts to multiple clients in the accounting database, and to have Implied Consent Status expire and be changed automatically based on the last invoice date of a contact's linked client. Other enhancements involve ContactLink, Contact and Mail Actions Imports, Events, Views, Logs, and custom RSVP landing pages.

Enhancements in Outlook Marketing page

- **Accounting Client Relationships**

  If clients are imported from the firm's accounting database to an IntelliPad table, this new section can be activated. There can be one link between a contact's primary company and an accounting client, and multiple links between a contact and additional accounting clients. NOTE: Firms already using the Business Information section for links to accounting clients will not activate this new section; contact Versys for assistance in order to change.

- **Automatic expiration of Implied Consent Status based on last invoice date**

  This feature is of interest to firms that allow Implied Consent Status for contacts (i.e. to receive emails). The links to accounting client(s) provide the last invoice date for each contact. Based on this date, a new scheduled task will change the Consent Status to "Withdrawn" after a designated time period such as 24 months—e.g. to comply with the Canadian Anti-Spam Law. An optional feature is email notification to the contact, prior to the scheduled expiration date, and giving them the choice to "OptIn" to further communications from the firm.

- **Additional Companies section heading changed**

  The section heading is now "Additional Companies and Clients Linked to Contact". Firms using the new Accounting Client Relationships section: Linked accounting clients are also shown under this section with "Client:" prefixed to the client names.

Enhancements in ContactLink

- **Search by Categories and "Categories" caption from Site Settings**

  The Site Setting that activates display of Categories on the Outlook Marketing page is now used by ContactLink as well—if it is not displayed in Outlook, there will be no Categories search in ContactLink. The alternative caption for "Categories" from the Site Setting is also used for the search caption in ContactLink—for example: "Area of Practice", "Line of Business."

- **Contact restriction in Views**

  For Views allowed in ContactLink, a new option provides restriction by logged in (or selected) user, i.e. attorney. Contacts not linked to the attorney will be left out when he or she runs Views in ContactLink.

Enhancements in the Web Interface

- **Accounting Client Links in Edit Person**

  Even if the new Accounting Client Relationships section is not activated for Outlook, the feature is always available in Edit Person if the Clients table contains records. Both Accounting and Business buttons will be enabled. The Accounting window provides selection of one client link for the person's primary company, and of one or more client links for the person.

- **Automatic change of Implied Consent Status based on last invoice date**

  As described above. If the Implied Consent Type (and Mail Type) are automatically changed by the new scheduled task, on the expiration date, the dates and program-generated note will be shown in the Edit Person page. Each firm can create a View of upcoming expirations.

- **Events**

  1. The default Time Zone comes from a new Site Setting, where it is selected from the table of international zones
  2. A new button provides verification that the AutoReplyEmail requirements have been setup correctly
  3. When duplicating an Event, the new Event Name is specified prior to saving

- **View Options**

  1. A new display option allows setting the width of columnar reports. Depending on the user's monitor display resolution, larger widths may require horizontally scrolling the browser window to see the rightmost columns.
  2. Two new options provide for exclusion of contacts whose first name is “Company:”, and of companies whose name starts with either “Contact:” or “Client:” (These are company-only contacts, and linked accounting clients.)
  3. As described on page 1, an option enables restriction of View contents by logged in (or selected) user, i.e. attorney, when run in ContactLink.

- **Marketing Administrator email address for notifications**

  A new Site Setting records this address, to receive notifications from marketing-oriented scheduled tasks (i.e. instead of the IntelliPad Administrator receiving them).

- **Contact and Company Consolidation**

  1. Company Consolidation: Added an option to ignore "Client: " and "Contact: " prefixes in company name when searching by group (i.e. to ignore accounting clients).
  2. Contact Consolidation: Added an option to ignore contacts with a first name value of "Company:" when searching by group (i.e. to ignore company-only contacts).

- **Import of Contact and Mail Actions CSV files**

  1. Alternate CSV Column Names table

     Any number of possible column headings, for both contact and mail actions comma separated values (CSV) files, can be defined in this table. The import program now automatically removes blank spaces, periods, and commas when trying to match column names in CSV files to the People and MailActionsImports tables; in addition, the program will try all column names in this table. Any column headings that still cannot be identified will be marked as “Ignore”.

  2. CSV file “Source” column may contain any value to override the default “Contact Import” or “Automatic Contact Import” provided by the import program
  3. Selection of column headings in the Import CSV Data screens

     The Verify page now provides selection of column headings, so that any column marked “Ignore” can be identified based on the data in that column, which the user can see. A new option allows the import of CSV files without any column headings, since all can be selected in the Verify page.

  4. More contact data fields in Mail Actions CSV files, with automatic creation of PeopleImports records

     CSV files for Mail Actions Import can now contain all contact information fields, i.e. for new contacts. Additionally, the CSV import program now optionally creates records for unrecognized contacts directly in the PeopleImports table, ready for import (i.e. instead of creating a CSV file as previously).

  5. Automatic processing for both Contact and Mail Actions CSV file imports

     This means the entire import process can now be automated, with user-definable parameters. Only the acceptance in review of new contacts imported, i.e. as created by Mail Actions Import, will be needed (if automatic acceptance of new contacts in review is not used).

- **New Contact Communications log**

  This log shows the number of times each contact has been included in any kind of email task

- **Other log enhancements**

  1. Quick Date Selection, all logs

     The default is “Custom” with Start and End Dates to be chosen or typed; and there are new choices like “Month to Date”, “Year to Date”, “Prior Week”, “Prior Month”, etc.

2. Data Changes log, Deletion

   The deleted person, company, event and task names are clickable to open a popup showing all links that were deleted.

Enhancements in custom landing pages

- **Custom field groups available for custom person-event link fields**
- **Custom person-event field group selected for an Event that has an RSVP landing page**

  The fields are displayed on the landing page, with their choices, and the contact responses are downloaded to IntelliPad. For example: Choice of meal, bringing a guest, topics of interest.

- **Source for new contacts that sign up on the web page**

  If the firm's custom landing page, whether RSVP or Subscription Management type, allows new contacts to sign up: The Source entry in the imported records will be "Website sign-up form."

Release 7.0.4.1

Release 7.0.4.1 includes major enhancements in ContactLink, Event and Mail management, and Contact Changes Review. The ability to import clients from the Elite® database has been added.

Enhancements in ContactLink

- **Edit contact information**

  In Event and Mailing List contact listings, authorized users can now edit the contact information—there is an Edit icon left of each contact name. Fields enabled for editing can be restricted. The changes are treated like changes from Outlook.

- All of the following display options have selection of firm-wide defaults in the new Site Settings; overrides can be selected for individual Events and Mailing Lists.

  - Default display options, with ability to hide

    Default values can be chosen for the Show Only Primary and Show Restricted Mail filters, and for the data options such as Email Addresses, Job Titles, and Mail Count. The options can be hidden in ContactLink, so that users cannot change them.

  - New Show Mail Count option

    If shown, the Mail Count is below each contact name--a clickable line showing the number of mailings for the past 24 months, with the earliest and latest dates. The link opens a popup showing more detail, and the option to show all mailings for the contact.

  - Default IntelliView filter

    An IntelliView filter can be selected, to be used for all Events and Mailing Lists, for all users, unless there is an override for a specific Event or Mailing List.

  - Show or hide link details

    With link details hidden by default, no users can open the link detail fields and select Override Mail values; they can only create the links.

Enhancement in Outlook

Users may receive email notification from IntelliPad when their contacts have responded to an Event invitation. This feature can be used for all or selected Events.

Enhancements in the Web Interface

- **Marketing Page Update Rules**

  Each firm can now decide how updates to Marketing Page field values—such as Consent Type, Mail Type, Referral—will be handled for "new" contacts from Outlook that are matched to existing contacts in Review. For Imported and Website source contacts, these rules are also used for changes to existing contacts.

- **Contact Changes Review**
  1. Edits are allowed in the Non-Reviewed window, based on the new Marketing Page Update rules. Values to be overwritten are color-coded in red text, and the reviewer may change the values to be saved.
  2. A larger warning screen is shown when acceptance of a change will affect other contacts
- **User notification for contact responses to invitations**

  The primary only, or all linked users, can receive an email from IntelliPad when a contact's Response to an Event invitation has been received. This feature can be used for all or selected Events.

Additional changes

- Edit Events
  - New ContactLink section provides overrides for all new Site Settings, and for the Response Notifications
  - Verify AutoReply looks for addresses in the Auto Reply Email Site Settings, i.e. to verify that the required addresses are present
- Contact Changes Review

  Both Source and Submitter are shown for each contact in the list, e.g. "Lynda Hendrell / Outlook"
- Views

  The New/Edit View screen opens with all sections closed
- Logs

  The Reviewed Changes log opens with details hidden and [+] buttons to open them. The new Settings Changes log audits changes to Site Settings, Interface Settings, Marketing Page Update Rules, and Data Steward options and match fields.
- Site Settings
  - New design with collapsible sections; the screen opens with all sections closed
  - New ContactLink section; and Response Notification and OptOut Mail Type Exceptions in the Mail Management section

Import Clients from Elite ® Database

Interested firms please contact Versys for more detailed information