IntelliPad CRM Product Development in 2020

There is one release in development in 2020, with a possible release date in the summer.

Release 7.0.5.1

Release 7.0.5.1 includes a major technical change which is not visible to the users—the IntelliPad COM programs have been converted to 64-bit. It is optional to use the 64-bit programs, which require the 64-bit version of Outlook. This change will result in fewer batch errors. The other major enhancement is a user interface for management of IntelliPad's scheduled tasks. The Active Users page has been changed to remove the obsolete Form Conversion display, and there are several enhancements to logs, as well as new logs, on the Management Menu.

Enhancements in the Web Interface

- **Active Users page**

  The obsolete Form Conversion display was removed; the Notify Email Address for each user (i.e. attorney) was added.

- **Management menu logs**
  - Selection Criteria: Added Quick Date choices Today and Yesterday.
  - Display pages: Added Print View button for all logs, and Export Results to Excel button for some logs (such as Batch Cycle, Application Messages, Outlook Tasks).
  - Mail Actions: Added Type "Unlink" to Selection Options

- **New Business Development log**

  Provides easy access to Activity entries by person, user, and date range; authorized users can edit the entries directly from this log view page.

- **Edit Company**

  "Contacts with No Address" are included in the address section at bottom of the page.

- **Mail task Exceptions page, duplicate email addresses**

  Users can now keep one of the duplicates in the mail task, and remove the other one(s).

- **Scheduled Tasks utility**

  This new utility makes setup and maintenance of the system scheduler easier and specific to IntelliPad tasks. The administrator can edit, pause/resume, and execute all the IntelliPad scheduled tasks, as well as add new scheduled tasks. There is one new task type: Purge PeopleTemp—this task removes orphaned records from the temporary tables.

From 7.0.4.1 Patches

- **Company Consolidation by Batch (p8)**

  Users can now select and process multiple groups of company records that have identical names.

- **Contact Changes Review "Contacts" option (p11, p12)**

  The Contact Changes Review main page has a new display option "Contacts", with choices All, Existing, New, or New Links (i.e. new with at least one link to an Event or Mailing List). This option enables the reviewer to focus on the type of review records of interest, instead of having to page through all records alphabetically.

- **Contact Removal utility, new option (p15)**

  Users can now select contacts that once had at least one linked Outlook user, but no longer have any. This will enable the removal of contacts, from the IntelliPad database, that attorneys have unshared in Outlook.

Enhancements in Outlook Marketing page

All enhancements are in the Activity Log for Business Development:

- Creation of log entry: As applicable to the Activity Code, recurrences are created and displayed for 12 months from the original entry Start Date.

- Editing of log entries with recurrences: Removed the "Select Edit Type" popup window; instead, the choice is made in the edit window itself.

- Open Activity Report: The link to "Edit Business Development Activities" was moved to the top of the report for easier access; the resulting edit page sorts in ascending order like the report.

Enhancement in ContactLink

In the Multiple Events/Lists menu selection: The "Show My Links" and "Show All Links" buttons have been added to the contact list pages. "My Links" means logged in user's or selected attorney's contacts only, "All Links" means all the firm's contacts, that are linked to at least one of the chosen Events and/or Lists.