

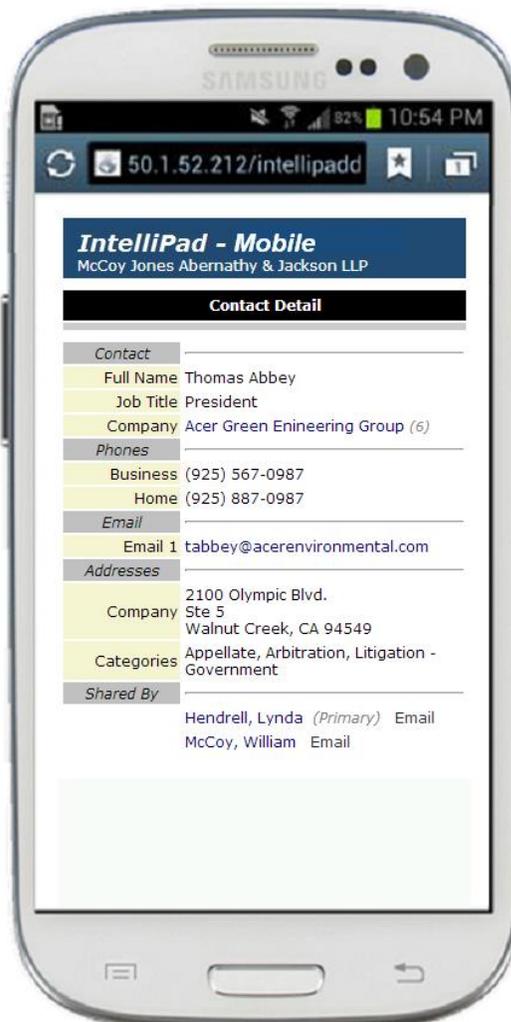
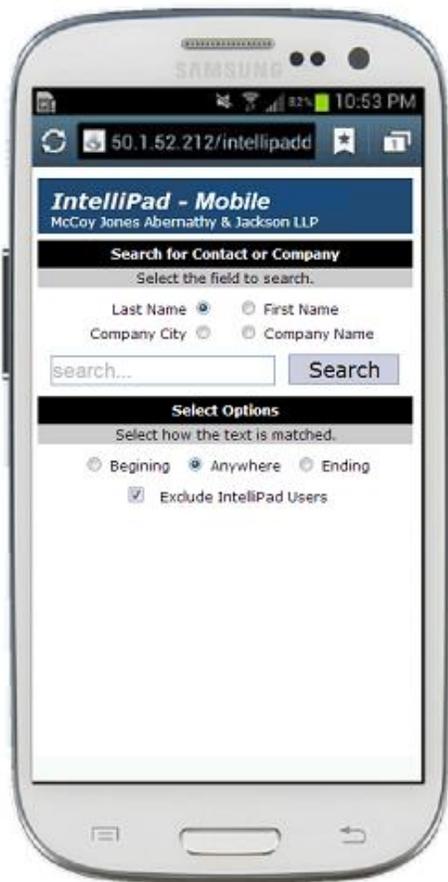
# IntelliPad CRM from Versys Software, Inc.

## Mobile Access

With the IntelliPad Mobile Access, professionals can easily access the shared IntelliPad contact information using their Smart Phones: iPhones and Androids. The IntelliPad Mobile Access is an optional module for IntelliPad.

While travelling to another city, a professional can easily see all firm contacts in that city, be able to call them with a single-click, check with another firm attorney on a question about the contact by phone or email, send an email to the contact, or see a Google map with directions to the contact's address. The IntelliPad Mobile Phone Access utilizes Windows Authentication, accesses the firm's CRM data via a secure VPN, and is fully audited as are all other accesses to the IntelliPad CRM database.

The Administrator will provide the correct URL for the Mobile Access to each user by email. After opening the first page of the IntelliPad Mobile (the search page) by clicking a link in the email, the user can set the URL as a favorite (or bookmark) in their phone and can also put it on their phone's first page for single-click access.



Clicking on a contact name after doing a search opens details of all Outlook contact information, mailing list and marketing event participation, business development activities, which attorneys work with the contact, and shared notes about the contact.

If needed, information about any attorney linked to the contact can also be shown, by clicking the attorney name under the "Shared By" heading.

A feature has been added which is not shown. The Contact Details page optionally provides a link "Add to My Outlook Contacts" if the contact being viewed is not in the user's Outlook Contacts; and shows the message "This contact is in your Outlook Contacts Folder" if applicable.

## Features

- **Search for a contact**

By contact first or last name, by company city, or by company name. See next page, bottom, for additional company city search results features.

- **View contact details**

Contact detail includes contact's company (with Priority Company Categories, if applicable) and job title, phone numbers, addresses, categories, email addresses (with one click to open an email message), and attorneys sharing the contact (with one-click opening of attorney detail, or an email message to attorney).

If the contact's company has other linked contacts, the company name is clickable to open a list of them with their job titles—the user can then view the detail for each of these contacts. If a contact is linked to multiple companies, the non-main companies are also listed.

- **“Add to My Outlook Contacts” link**

If the contact being viewed is not in the user's Outlook Contacts, click this link to add it.

- **View company details**

The company name search produces a list of companies in which the company name is clickable to see the list of contacts linked to it; the contact details can then be viewed. If Job Titles are present for attorneys and other staff members, in IntelliPad, they will be shown for each linked attorney in the Company Contacts List.

- **Easy return to search page**

After viewing details of contacts, etc. users can easily return to the main search page by clicking the word “IntelliPad” in the banner.

- **If logging is turned on, these searches are also logged**

As with searches done in Outlook or in ContactLink, all contact and company searches done in the IntelliPad Mobile app are logged, and are available in the ContactLink Search Results log.

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- **Restrict access to contacts, or to other professionals only**

Attorneys can be allowed to access all firm contacts, or can be restricted to their own linked contacts only. Access can be further restricted to other attorneys (or other firm professionals) only. In IntelliPad there is an overall site setting, with individual user level override.

- **Google map, directions, and views of contact addresses**

Clicking any address in the contact detail view opens the Google map view, which includes satellite and street view options.



## Company City Search

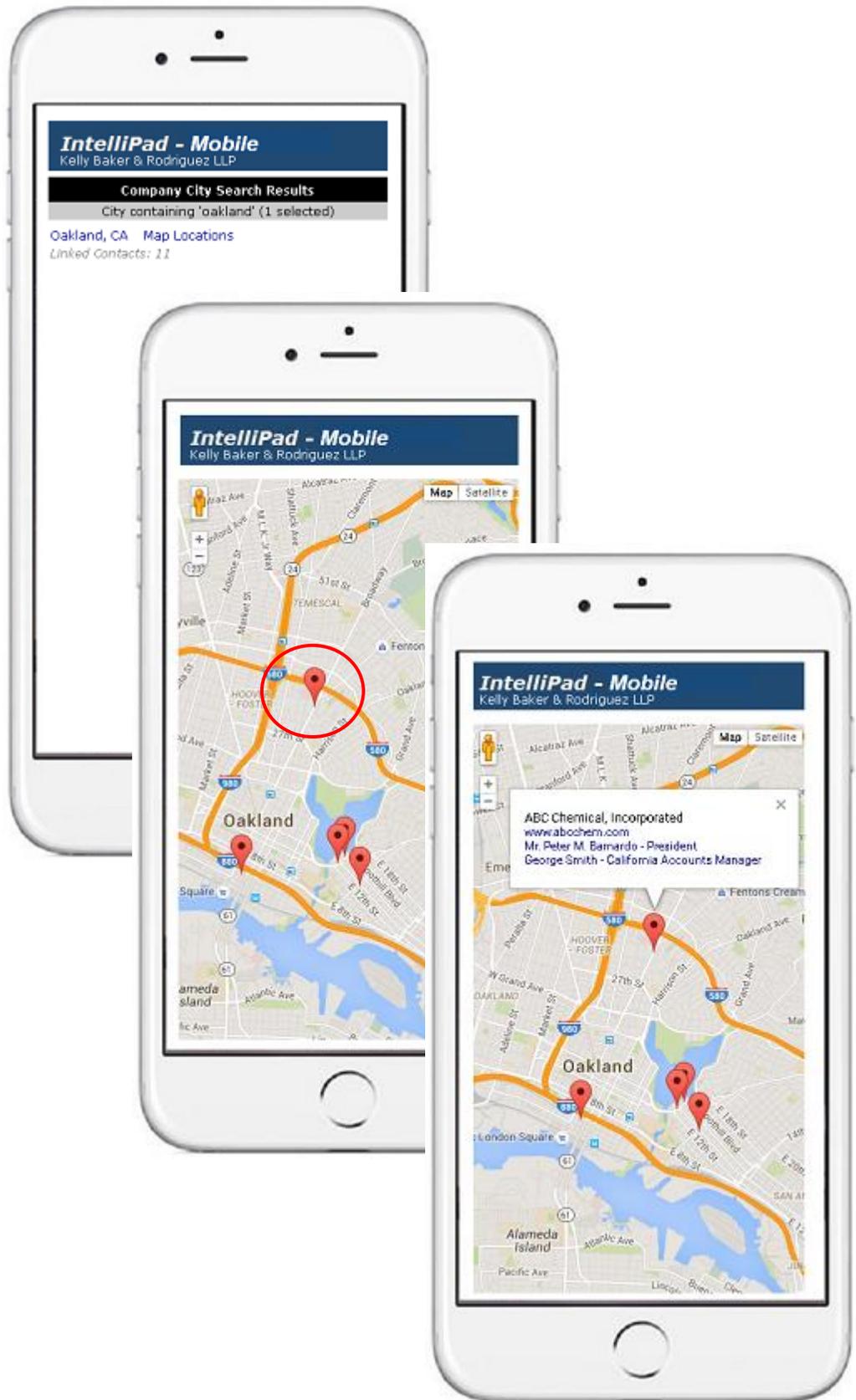
This feature is helpful for attorneys to see who the firm knows while visiting another city.

The company city search results includes the link “Map Locations”, and shows just the total number of contacts below the city name.

Clicking “Map Locations” opens a city map page that pinpoints the location of each company in the city search results. The sample screens are from an iPhone.

Clicking on a company location on the map opens a list of the firm’s contacts at that company.

Then, individual contact information can be seen, or the firm’s website link can be clicked.



## Versys Software, Inc.

Versys Software and its predecessor company have a long history of providing high quality products accompanied by full service to clients in the legal community. Prior to focusing on the legal profession in 1985, the company developed professional billing software for the medical profession, full accounting and project management software for construction companies, and inventory and parts management for the auto dealership business. This varied background provided the basis for the development of the Legal Insight billing, accounting, and practice management software – and more recently, the IntelliPad CRM software.

The company is headquartered in San Francisco, with support offices in New Jersey, Massachusetts, South Dakota, and Arizona. On-site and web-based consulting and training are available for new software installations and support services. Our clients consistently report that our staff is friendly, capable, and responsive.



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