

IntelliPad Release 5.0.1

1. Automated Data Steward and Data Cleansing

Each firm can now 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".

2. More Efficient Company Address Management

The new Company Addresses table is now 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.

3. 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 (formerly Permissions).

✓ **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.

✓ **User 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.