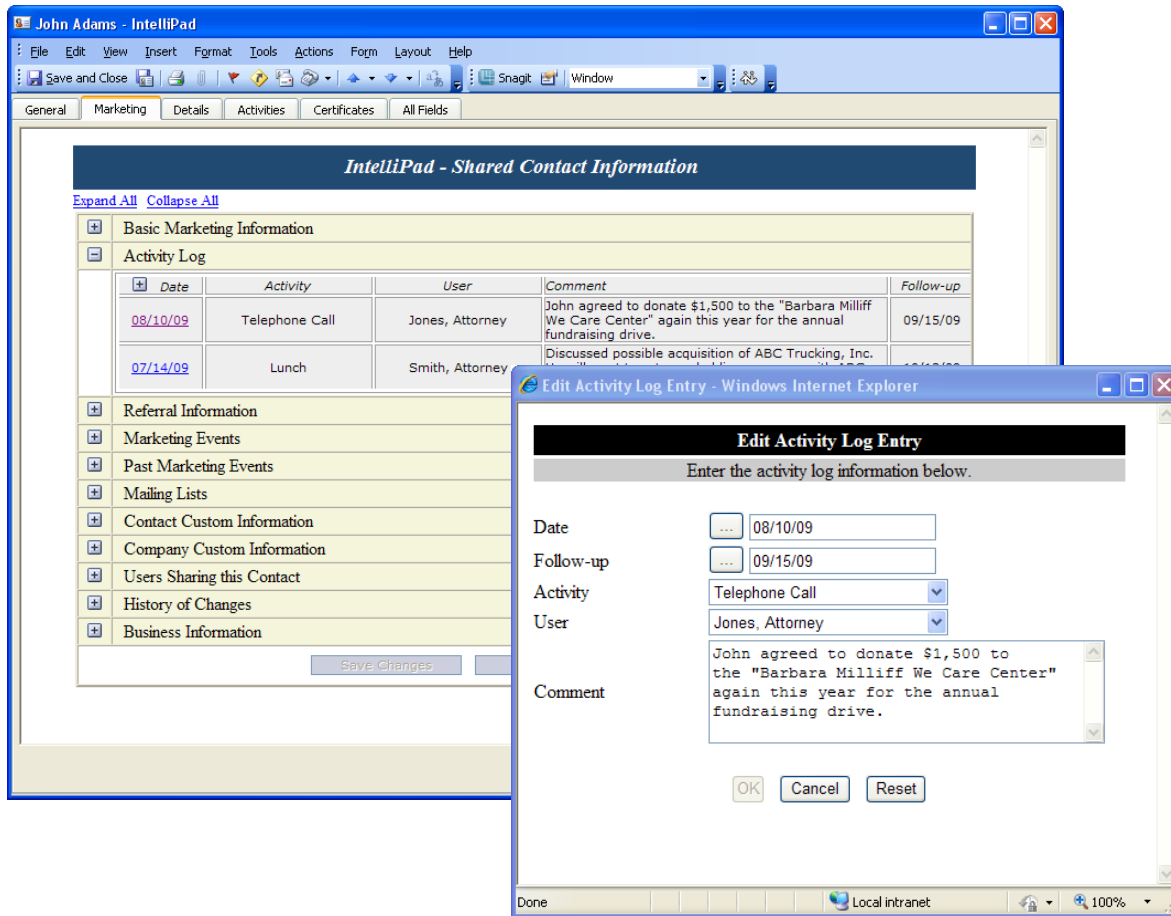


Contact Activity Tracking



Activity Log: Attorneys can log business development and other significant activities with contacts in Outlook with the new Activity Tracking feature (as shown above in Outlook 2007). The logged activities can be used to monitor business development activity, with activity types set up to meet firm objectives.

Data Consolidation Simplifies Data Management

✓ Person

Even with automatic Outlook searches as new contacts are being entered, automated and selected human reviews, and powerful data matching and data cleansing features, occasional mistakes can result in duplicate database records for the same person. This new feature finds possible duplicates by matching on selected data such as email address. The feature then provides a means to manage these possible sets of similar contact records with an intelligent and manually controlled merge of available contact information. All database links to attorneys, events, mailing lists, and companies are automatically updated and logged.

Data Consolidation Simplifies Data Management, Continued

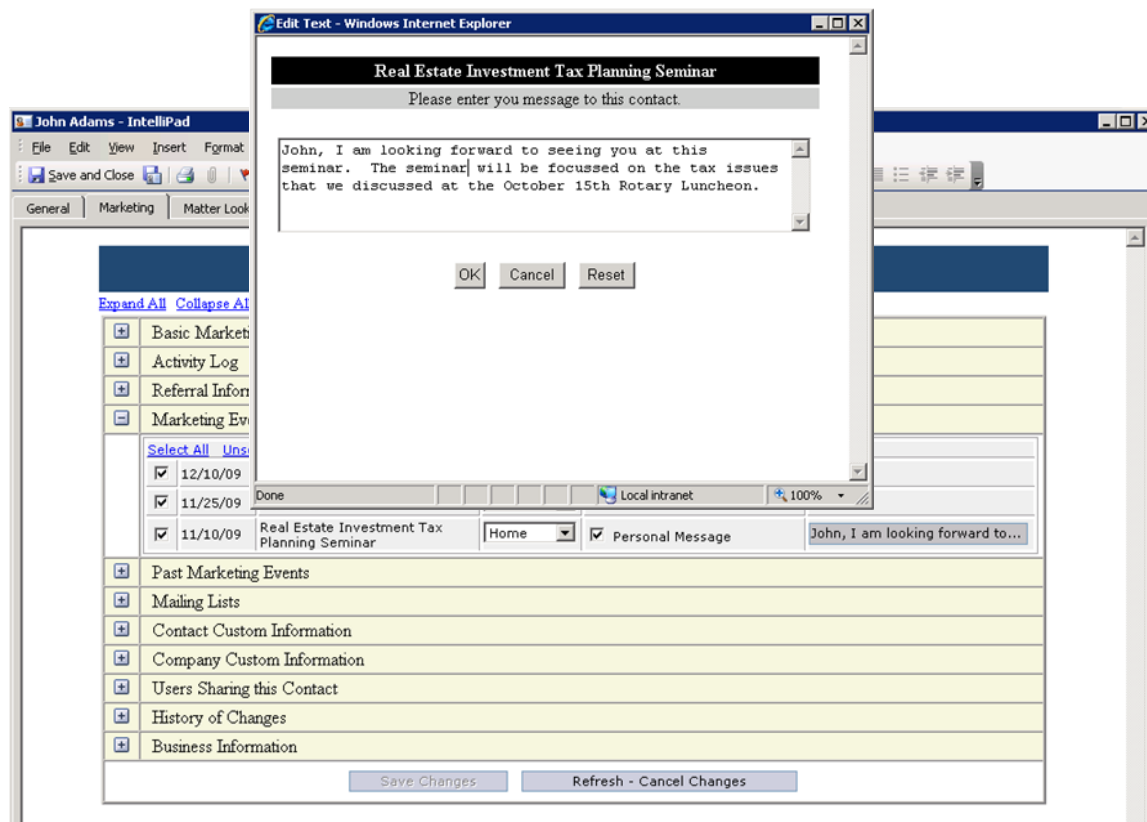
✓ Company

A new administrative feature allows review of selected companies by searching for "starts with", "ends with", or any part of the name. Within the query results, just by clicking on company names where a duplicate exists in the database, the application deletes the duplicate company data, re-aligns all internal links between the company and related people and company-related addresses. All database updates are fully logged for future reference.

✓ Company Address

Sometimes extra addresses are created in the database because of slight inconsistencies in how they are entered (even though the application shows available addresses for a company when a new person is added – and data cleansing features help to manage this information). All addresses for a company are shown and can be easily modified and consolidated as may be appropriate.

Personalized Messages from Attorneys for Email



When invitations are sent out by email to attorney's contacts, attorneys sometimes want to add a personal note to the email. This new feature allows attorneys to add or edit that note for an upcoming event in the Outlook contact form (on the IntelliPad marketing tab as shown above in Outlook 2003). They can also add or edit the personal message when reviewing their own list of shared contacts where a checkbox indicates which contacts will be invited.