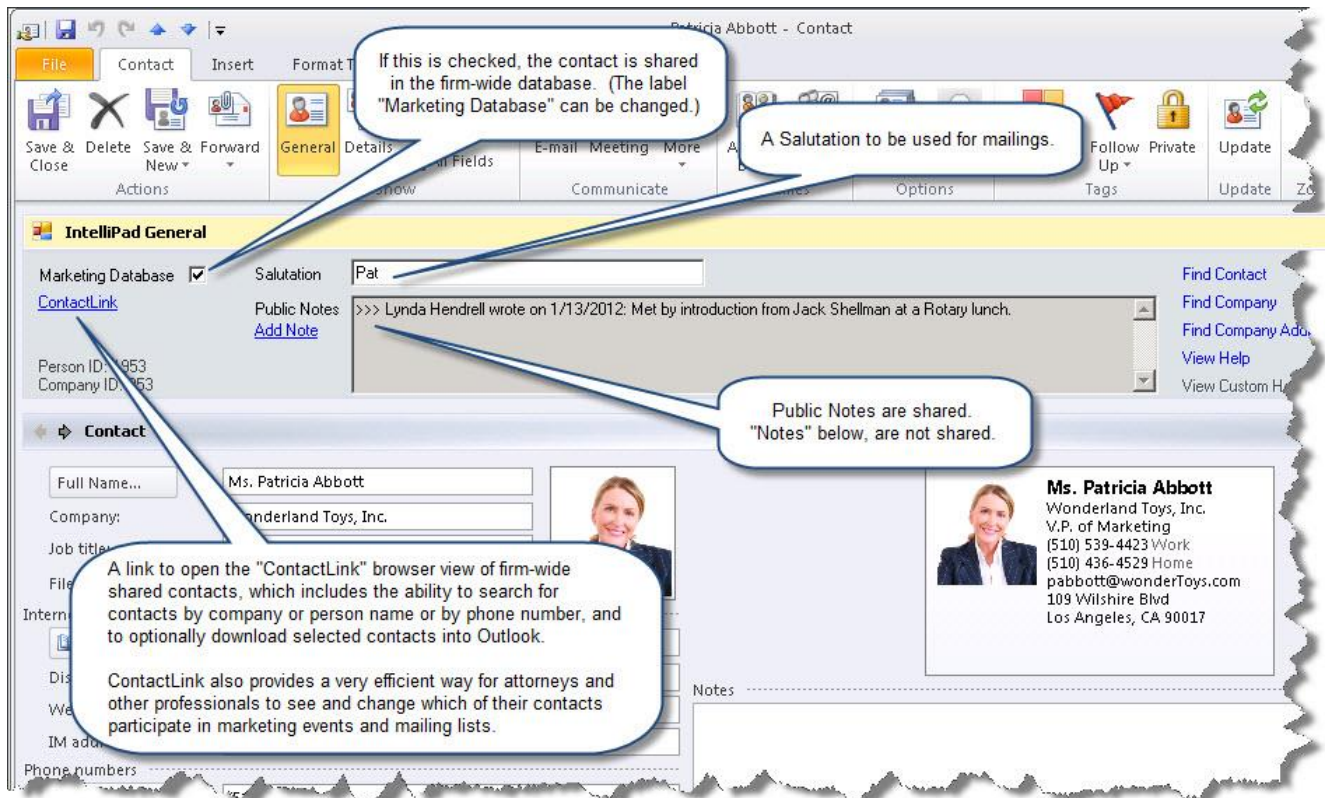


New Release Introduction

This major release includes over a year of development work. There were interim small releases to add requested features and to make corrections where needed. Highlights of the new functionality are summarized below and described in some additional detail following.

- ✓ New Outlook form: IntelliPad Add-in
- ✓ IntelliMap for Outlook contacts
- ✓ Contact Import
- ✓ Filter by View in Add Links
- ✓ Email notifications to users
- ✓ Link Management utilities
- ✓ Contact, Company, and Outlook Duplicate Removal
- ✓ Primary User Review
- ✓ Outlook Searches Log

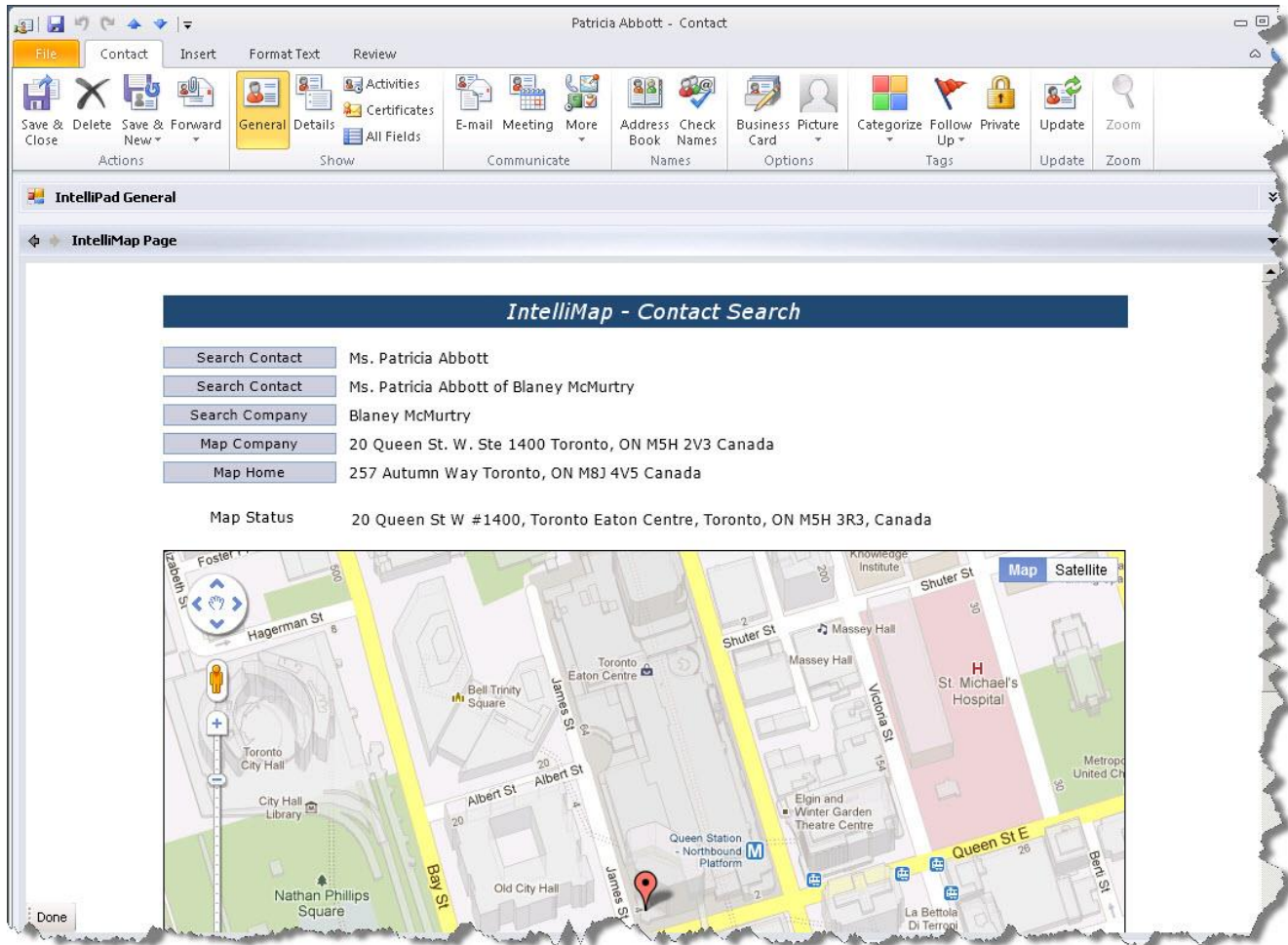
New Outlook form: IntelliPad Add-in



This release introduces a new design of the IntelliPad features used in Outlook. The IntelliPad Add-in program uses the standard Outlook form and adds "regions" to it—IntelliPad General, Marketing, and IntelliTab. It can only be used with Outlook 2003 and above. The purpose is to enable users to take advantage of newer Outlook features such as contact pictures, business cards, and ribbons. These new features are not supported by the old "legacy" form, which is a replacement for the Outlook form built with older technology. Upgrading to the Add-in is optional.

IntelliMap for Outlook contacts

This feature provides, on the IntelliTab page, the ability to do Google searches on the contact and company names, and to display the Google map of the company address (and home address if present). It can be used with both the old "Legacy" form and the new IntelliPad Add-in form.

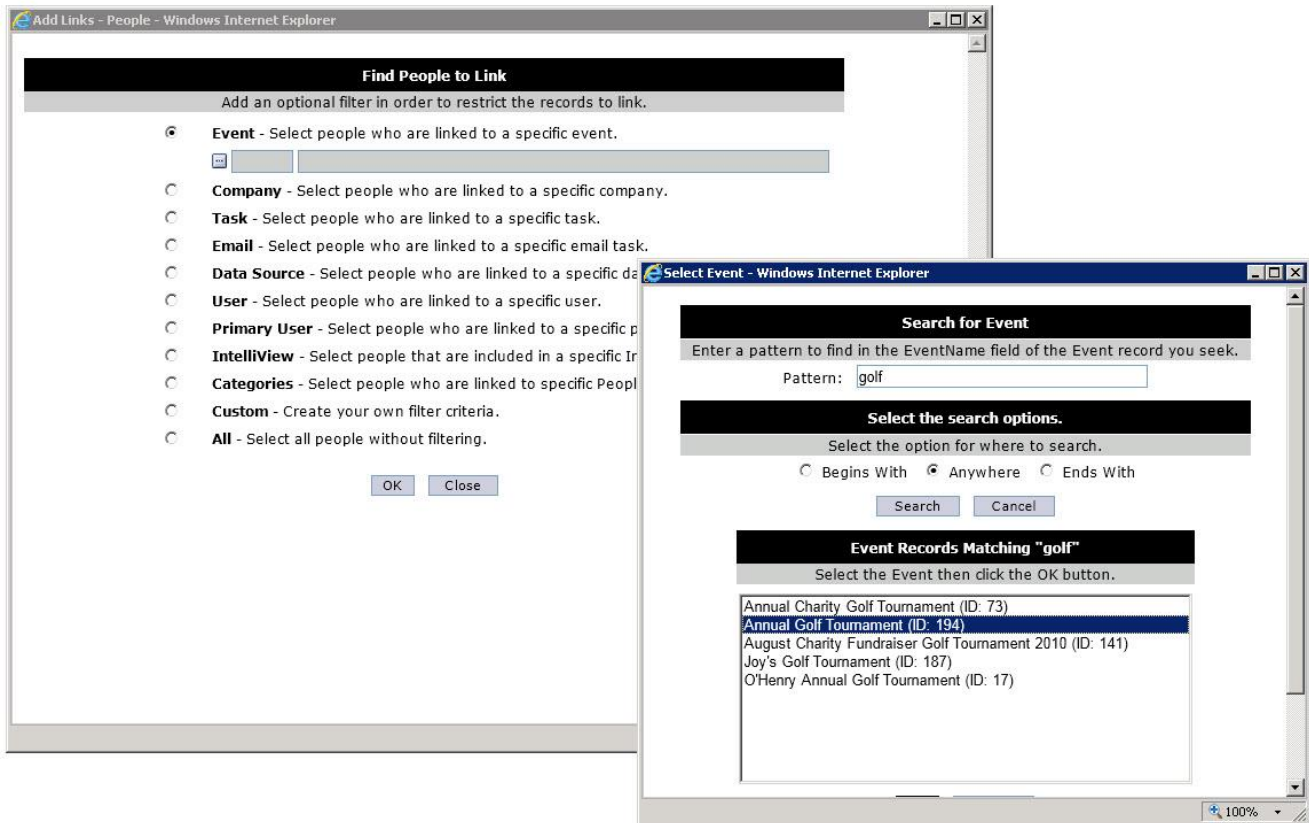


Contact Import

This feature has been enhanced to serve as a means of supporting data replication of contact information from sources other than Outlook. There is a new "Contact Import" heading on the Management Menu, containing all programs. Contact data can now be imported from a comma-separated values file into the People Imports table. The Import Contacts program treats these contacts as if they had come from Outlook, so all features associated with regular review record processing are applicable - the program creates review records which go to automatic processing, if used, or to Contact Changes Review. There is an Imported Changes log. Contact records with errors are identified by the import program; an Editor is provided so these contacts can be corrected and re-processed (or deleted). The import program includes the new ability to link users to a new or existing contact, so there are new Site Settings to determine how the export program finds and handles potential duplicate contacts in Outlook. The program also links the imported contacts to Events and Mailing Lists, if any. All contact records now have a Source designation - Outlook or Contact Import - shown in the review detail page and in the resulting person records.

Filter by View in Add Links

The Add Links function now includes a filter choice of "IntelliView", so that users can link the records in a selected View to an Event, Company, Task, or Person.



Email notifications to users

Any type of message can be sent to all or selected Outlook users at any time. For example: meeting reminders, notifications about system maintenance, etc.

Link Management utilities

There is a new "Link Management" heading on the Management Menu. For IntelliPad links, all link types can be searched; invalid links will then be removed and missing links will be created. For Outlook links, the OutlookIDs table can be rebuilt, followed by a search by user; invalid links will then be removed, missing links will be created, and invalid CreatedByID values will be corrected.

Contact, Company, and Outlook Duplicate Removal

The Contact and Company Removal utilities provide deletion of multiple inactive contacts, or companies, at one time. Selection is by link types that the contact or company does not have, and by creation date range and/or last modified date range.

Outlook Duplicate Removal provides a search for duplicate contacts by user. Each removed duplicate is moved from the user's Outlook folder to the Deleted Items folder. The program retains the oldest link, based on creation date, and removes the extraneous person-user link from the Person-Person links table.

Primary User Review

Additional Site Settings for the Primary User Review feature:

- Primary's changes to his/her own contacts can be not subject to review
- The Time Limit can be specified in days or weeks
- With use of "allow full editing": Features available on the Edit Contact Detail page can be restricted

There is a new online help file for Primary User Review, opened from both the PU Web page and the Edit Contact Detail page.

Automatic Log Purging

New Site Settings determine the number of days each log type is kept online. Data and Link Changes logs are not available for automatic purging.

Outlook Searches Log

This log provides information on searches that were done by users either in Outlook or in Contact Link, with selection by search type Person, Company, Person-Company, or All. A new Site Setting activates this feature.

Selected: Outlook Searches

The Outlook Searches log is used to record searches performed by users while in ContactLink, the Legacy IntelliPad Outlook custom form, or the IntelliPad Outlook Add-in. This log also records when the detail is viewed from each search and whether the detail view was printed. Note: Contact lists associated with events are not considered searches and thus not recorded, and detailed views of contacts or companies from links on these lists are also not recorded.

Selected: Outlook Searches

Select	View Type
<input type="radio"/>	Detail - Show the search de
<input type="radio"/>	Summary Search - Show a
<input type="radio"/>	Summary Matched - Show
<input checked="" type="radio"/>	Summary Viewed - Show a
<input type="radio"/>	Summary Printed - Show a

Outlook Searches - Person Searches in ContactLink and Outlook - By Detail Viewed

View Detail	Submitter Name	Search Count	Detail Matched	Detail Viewed	Detail Printed
Detail	George Wilson	7	9	5	0
	George Wilson (OL)	4	4	4	0
	Bill McCoy (OL)	13	68	4	0
Detail	William McCoy	5	314	2	0
Detail	Lynda Hendrell	5	104	2	0
	Lynda Hendrell (OL)	1	1	1	0

[Return to Selection Criteria](#)

Outlook Searches Log - Submitter Detail - Windows Internet Explorer

Date	Type	Submitter Name	Search Criteria	Match	Print
02/01/12 08:07 AM	Person	George Wilson	FileAs Begins With 'aus%, cod%'	<u>2</u>	No
02/01/12 08:09 AM	Person	George Wilson	FileAs Begins With 'aus%, cod%'	<u>1</u>	No
	Detail Viewed	Person Name (ID) Austin, Cody R. (1924)			Printed No
02/01/12 09:48 AM	Person	George Wilson	FileAs Begins With 'aus%, cod%'	<u>1</u>	No
	Detail Viewed	Person Name (ID) Austin, Cody R. (1924)			Printed No
02/01/12 10:41 AM	Person	George Wilson	FileAs Begins With 'aus%, cod%'	<u>1</u>	No
	Detail Viewed	Person Name (ID) Austin, Cody R. (1924)			Printed No
02/01/12 03:03 PM	Person	George Wilson	FileAs Begins With 'aus%, cod%'	<u>1</u>	No
	Detail Viewed	Person Name (ID) Austin, Cody R. (1924)			Printed No
02/06/12 11:15 AM	Person	George Wilson	Last Name Contains 'geo'	<u>2</u>	No
02/07/12 09:53 AM	Person	George Wilson	Last Name Begins With 'cavuto'	<u>1</u>	No
	Detail Viewed	Person Name (ID) Cavuto, Victor Y. (372)			Printed No

[Close Window](#)

Search Type

Person search, where conta

Person-Company

Company search,

All search types.

Criteria

Select: All Source Types

Source: All Source Types

Submitter: []

Earliest: []

Latest: []

[View Selected Log](#)