

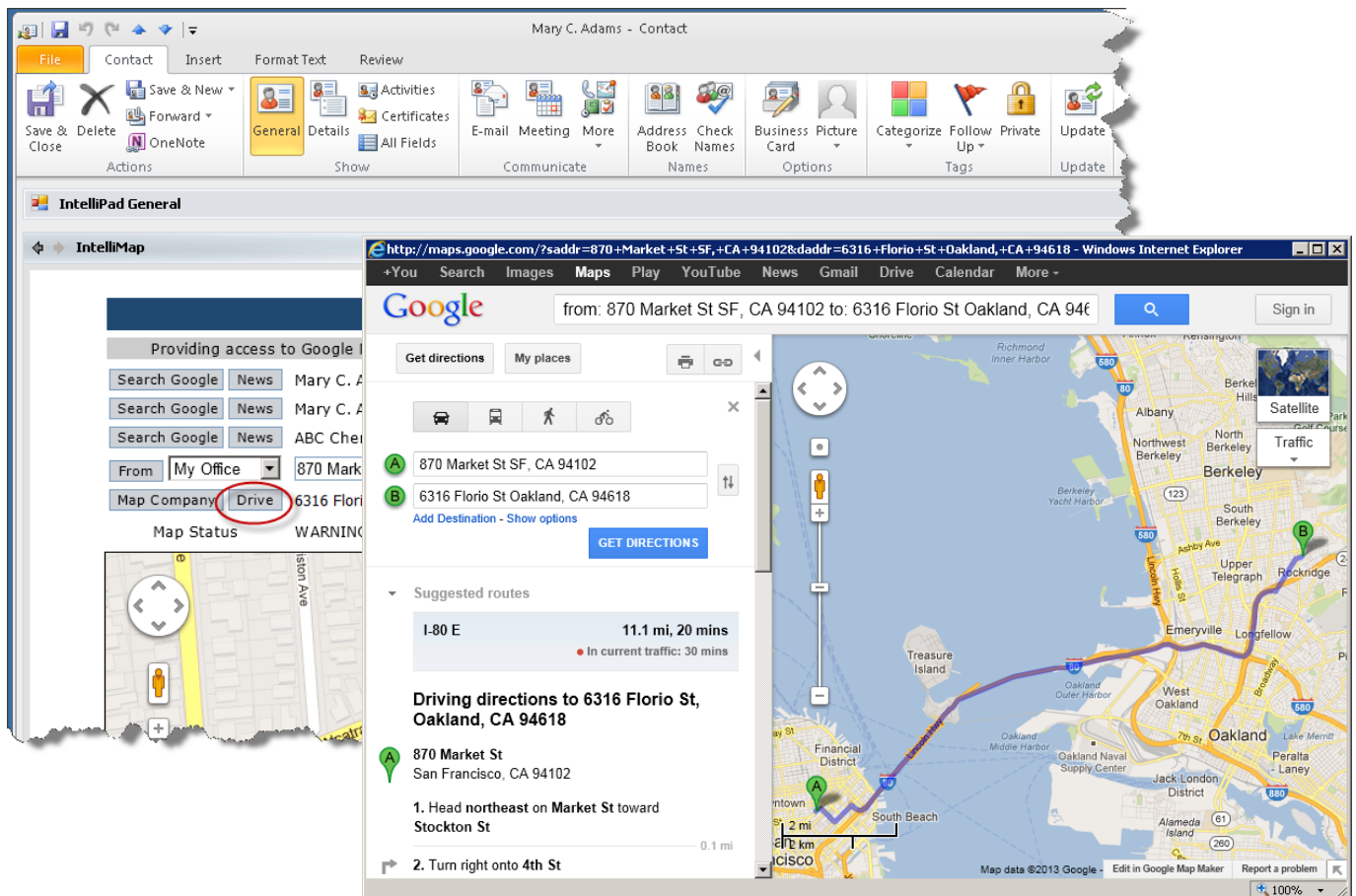
New Release Introduction

This release summary includes IntelliPad CRM development efforts during 2012. There were interim releases to add requested features and to make corrections where needed. Highlights of the new functionality as listed below are also described in more detail.

- ✓ Google News for Company, Person, or both Person and Company
- ✓ Driving Directions to Contact Company (from attorney office or other location)
- ✓ "Mail Type" with Notes for Preferences and Unsubscribes
- ✓ Prior Company and/or Additional Company Information
- ✓ Daily Outlook Search Log Emails for Primary Attorneys
- ✓ Juris Financial Data Automated Import
- ✓ Attorney Visibility of Firm-wide Contact Participation in Mailings

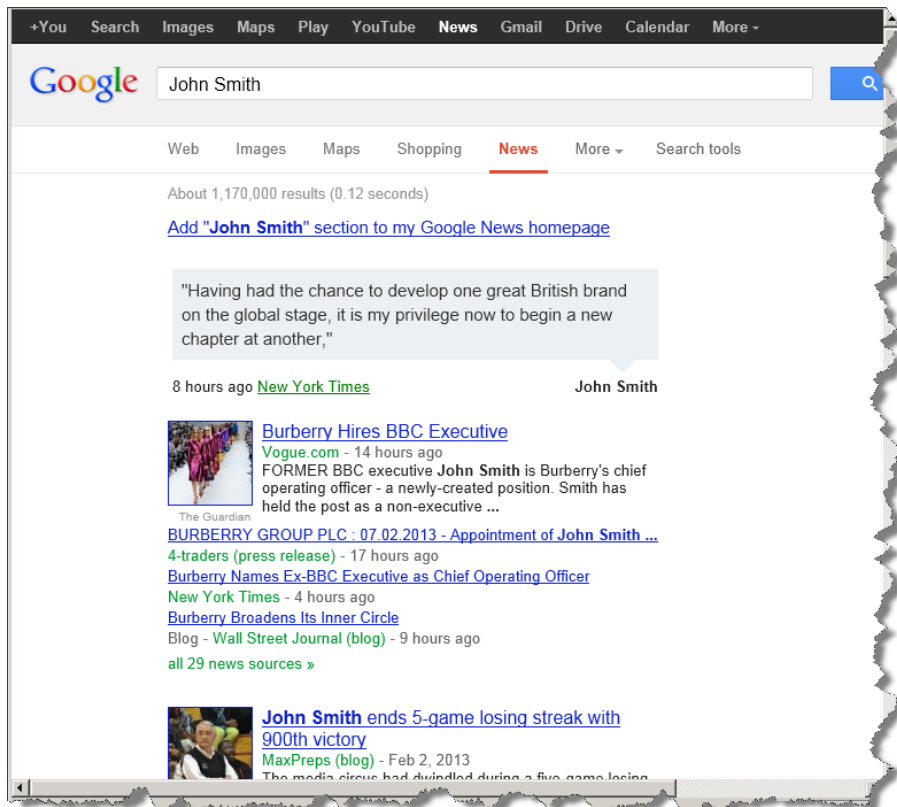
Driving Directions to Contact Company

Available from Google from within the Outlook contact, IntelliPad uses the office address of the attorney as the starting location, unless it is changed.



Google News for Company, Person, or both Person and Company

In addition to the available IntelliPad Google name searches, IntelliPad now also offers the opportunity to quickly search for News.



"Mail Type" with Notes for Preferences and Unsubscribes

Contacts can now have a Mail Type of Email and Letters (default), Email Only, Letters Only, or No Mail. Exceptions can optionally be allowed. A Mail Type can also be assigned to an Event or Mailing List. The Mail Type determines which kind of mail task each contact may be included in. If a contact has exceptions allowed, then a different Mail Type can be used—for the Event or List itself, or as overridden by respective professionals for a contact.

Prior Company and/or Additional Company Information

If a contact's primary company is changed, whether in Outlook or IntelliPad, the link to the former company can optionally be kept every time the company is changed. This information is both visible and can be added or changed in Outlook.

Daily Outlook Search Log Emails for Primary Attorneys

If activated: This new menu selection provides a report of contact searches done, by other attorneys or staff, in both Outlook and ContactLink. An optional daily summary of detailed views and/or downloads of contacts can be emailed to professionals for contacts for which they are designated as the Primary User. Or, Primary Users can look-up search history about their own contacts.

Juris Financial Data Automated Import

IntelliPad offers a Business Information Financial summary in Outlook which can be used to see a snapshot of the client-level economics related to each contact. Typically this information is updated daily and can be seen within Outlook for each client-related contact. The most recently completed integration is for Juris.

Professional's Visibility of Firm-wide Contact Participation in Mailings

IntelliPad has always offered the ability for each professional to easily manage participation of their contacts in any upcoming mailing or marketing event. This can be accomplished by clicking a link in Outlook to bring up a browser view where they can select an event or mailing and see all of their own contacts with a check box on the left to indicate whether or not that contact is included. With a single click by the marketing staff, the same web page view of contacts for a particular mailing list or upcoming marketing event can be provided by email to all professionals – to allow them to efficiently update their preferences for their own contacts.

Now, IntelliPad has extended the information provided to professionals to include firm-wide visibility of contacts set to participate in an upcoming marketing event or mailing. Both the non-editable firm-wide view and the professional's editable contacts can be sorted by person or by company.

The image displays two screenshots of the IntelliPad ContactLink web interface. The left screenshot shows a user's view of contacts for a mailing list, with a table of contact names and company names. The right screenshot shows a firm-wide view of all linked contacts for the same mailing list, with a table of contact names and company names. Both screenshots show a 'Contacts Linked to Mailing List' header and a table of contacts with checkboxes and company names.

IntelliPad - ContactLink®
Hawthorne Smith LLP
Attorney Jones (ajones, 2)

Find/Add Contacts | Marketing Events | Past Marketing Events | Mailing Lists | Delegate Rights | Search Results

Contacts Linked to Mailing List "Estate Planning" (ID: 143)
Only User "Attorney Jones" Linked Contacts Included (excluding No Mail, No Exceptions)
Currently, 77 of your contacts are linked out of 139
Default Mailing Address: not selected

Rows per Page: 15 Order By: Contact

Contact Name	Company Name
<input checked="" type="checkbox"/> Abernathy, Robert	London Drugs
<input type="checkbox"/> Adams, John	SourceMedia
<input checked="" type="checkbox"/> Adams, Mary C.	ABC Chemical
<input type="checkbox"/> Adams, Robert	ABC Chemical
<input checked="" type="checkbox"/> Adamson, Paula H.	Vicker Compar
<input checked="" type="checkbox"/> Anderson, Robert	London Drugs
<input checked="" type="checkbox"/> Barkman, Alfred R.	Kindred Hospil
<input type="checkbox"/> Baum, Harvey P.	Endeavor Mar
<input checked="" type="checkbox"/> Bocaccio, Lawrence J.	Cooperman Ci
<input checked="" type="checkbox"/> Bonanno, Robert J.	London Drugs
<input checked="" type="checkbox"/> Bullins, George T.	Cameron Asso
<input type="checkbox"/> Cargill, Henry	Cargill Electric
<input checked="" type="checkbox"/> Carson, David B.	Johnson Enter
<input type="checkbox"/> Caruthers, Donald	Caruthers Dev
<input checked="" type="checkbox"/> Cole, Veronica	ABC Chemical

Save Changes * Cancel Changes Print List

* Note: Changes are automatically saved when you click on a contact.

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Contacts Linked to Mailing List "Estate Planning" (ID: 143)
All Linked Contacts Included
145 contacts are linked.
Default Mailing Address: not selected

Rows per Page: 10 Order By: Company Name Redisplay List

Contact Name	Company Name
<input checked="" type="checkbox"/> Smith, Attorney	Abbey, Wentworth & Littlejohn LLP
<input checked="" type="checkbox"/> Adams, Mary C.	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Appleton, Craig R.	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Barnardo, Peter	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Bonfoey, Claire B.	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Cole, Veronica	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Jackson, John	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Smith, George	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> White, Janice	ABC Chemical, Incorporated
<input checked="" type="checkbox"/> Wilson, George Bryon	ABC Chemical, Incorporated

Close Window