

Release Update Summary

This newsletter covers the releases provided in 2013 through February of 2014. Highlights of the new functionality are summarized below and described in some additional detail following.

- ✓ Constant Contact Email Integration – including automated response tracking
- ✓ IntelliPad Mobile Access – smartphone and tablet access (with security) to shared contacts
- ✓ Business Development – management of recurring communication for key contacts
- ✓ IntelliMap for Outlook Contacts – upgraded to include Driving Instructions and Google News
- ✓ Automated User Setup from an Import Table
- ✓ Feature Visibility Control - for selected Outlook Users
- ✓ Juris Accounting Data Import – for user-selected visibility in Outlook
- ✓ And, upgraded for Outlook 2013 and Exchange 2013 with over 30 other enhancements

Constant Contact Email Integration

Versys Software has partnered with [Constant Contact](#), the premier web mail service provider with over 500,000 clients world-wide to provide more email services to IntelliPad clients. By using Constant Contact together with IntelliPad to send out email campaigns, your firm avoids exposing its own URL for possible designation as a source of spam. IntelliPad automatically communicates with Constant Contact servers from your server to update contact information and email campaign participation and to pull back email response information for Opens, Bounces, Forwards, and Opt-Outs.



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EMAIL MARKETING,

and your customers'll
get hooked **ON YOU.**

That's because **Constant Contact Email Marketing** is an easy way to create email newsletters that draw your customers and prospects in to do more business with you.

They'll love hearing from you, and you'll love seeing what Email Marketing does to your bottom line. Ask us, if you want to learn more. And be sure to [try it out, risk-free](#), for 60 days.

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GET HOOKED



IntelliPad Mobile Access

While travelling to another city, it would be convenient for an attorney to see all of the shared firm contacts in that city, look up contacts by name or company name, and then be able to call on the phone or send an email with a single-click, see a map of their location, or check with another attorney in the firm for a question about the contact by phone or email.

The optional IntelliPad Mobile phone access fulfills all of these needs and more. It does not require an application installation and works on both Android and iPhones, utilizes Windows Authentication, allows control over what each user can see (firm attorneys only, their own shared contacts, or all shared contacts), and is fully audited as are all other accesses to the IntelliPad CRM database. Additional information not shown in the examples below include participation in firm mailings and marketing events, shared notes, and business development activities.



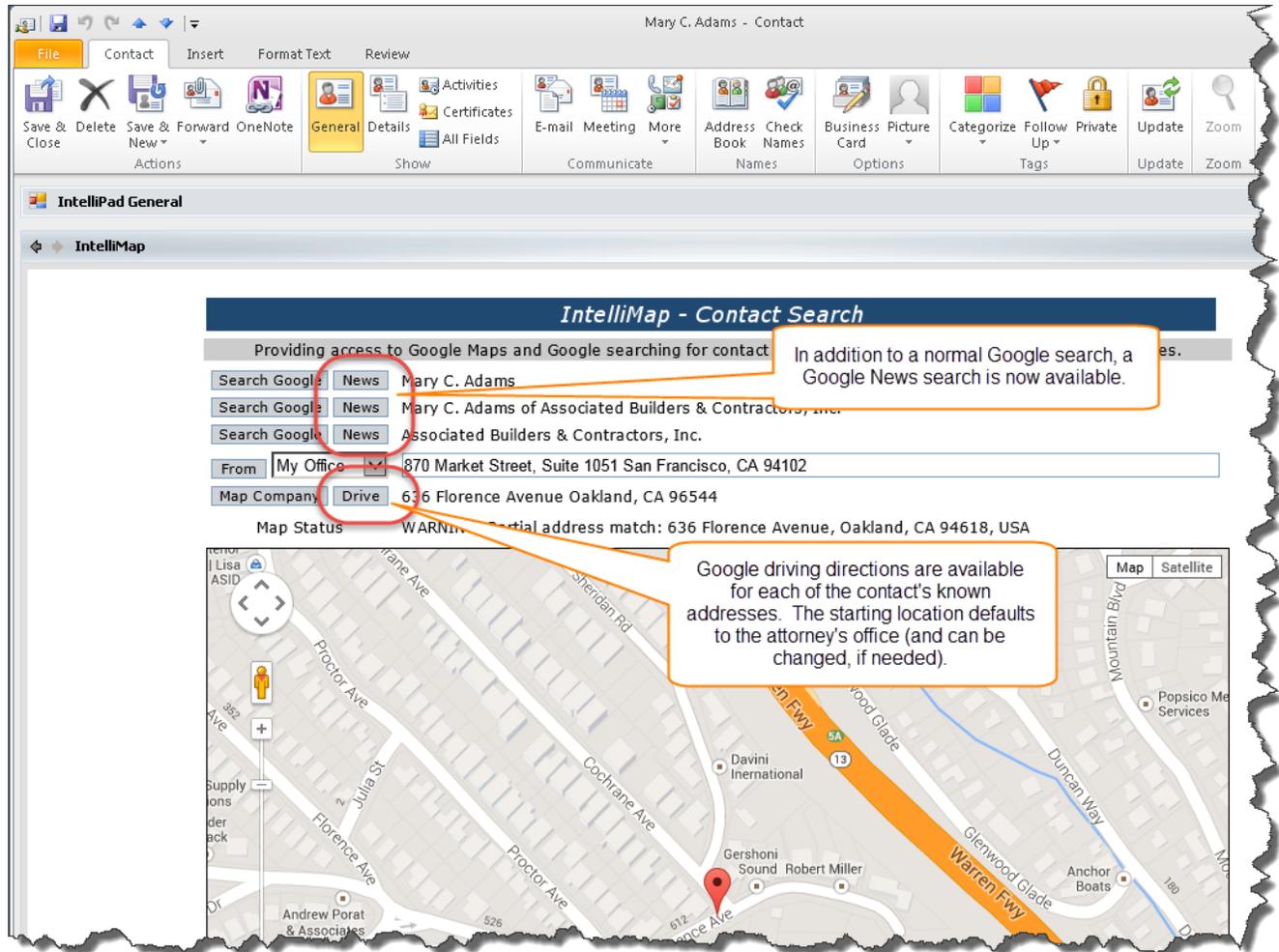
Business Development

Important contacts need frequent attention and less critical contacts need attention periodically. The strategy of entering a follow-up date for a contact on a calendar is only efficient when the activity is accomplished exactly as planned. That is often not what happens, so the calendar entry has to be moved to a new date.

With IntelliPad Contact Follow-up Management, all of this becomes a lot easier. For each contact, attorneys can set the frequency of how often to communicate. IntelliPad provides a means to log follow-up activity and provides periodic email notifications to each attorney for follow-ups that have not occurred and for follow-ups that are planned for the near term. Each contact in Outlook also displays a history of how each follow-up was done and allows the attorney to be creative in how the next follow-up is accomplished. Attorney notification emails for follow-ups can be redirected to respective administrative assistants so they can work with attorneys as business development teams. With IntelliPad mobile phone access, follow-up information is also included for each contact. This business development activity can be shared with all attorneys, selected attorneys, or kept private between the attorney and the marketing department.

IntelliMap for IntelliPad Contacts

This feature is available in Outlook for all shared IntelliPad contacts.



Automated User Setup from an Import Table

To facilitate larger clients, IntelliPad now provides the needed documentation and can automatically import new users from a SQL table populated by a local inter-application utility or other process.

Feature Visibility Control

The Business Information feature which shows client-level accounting information in Outlook now can be turned on or off for selected attorneys (typically, only partners are allowed to see this information). The Business Development functionality in Outlook can also be selectively turned on or off for individual attorneys (this is helpful in rolling out the capability to the firm on a departmental basis).

Juris Accounting Data Import

On an automated recurring basis, Juris client-level accounting information can be pulled into the IntelliPad client summary table for viewing in Outlook (in the Business Information view as mentioned above).