

Releases Update Summary

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

- ✓ The IntelliPad Outlook form was updated to work in Outlook 2013
- ✓ A new type of mail task outputs a file of selected contact data for upload to any webmail service provider
- ✓ Added "Mail Type Source" and "Mail Type Note" contact data fields, for use by firms required to show permission from contacts and clients to receive emails or mailed materials
- ✓ New "Mail Actions Import" functionality, to import mail-related information for contacts
- ✓ Contact, and Company, Consolidation by "Duplicate Grouping" provides the ability to search for possible duplicates using name and email, or company, fields with a specified letter range and number of letters that must match exactly
- ✓ ContactLink and IntelliPad Mobile: Both the contact and company detail popups include a lot more information, and provide one-click access to Google maps of the addresses
- ✓ Added a new processing rule for automatic acceptance of new contacts, from Outlook or imported, designed to catch more potential matches already in the IntelliPad database
- ✓ New tools added to the data steward's review page, to assist in finding potential matches when accepting new contacts
- ✓ Additional management logs provide more detailed troubleshooting

New type of mail task outputs file for upload to any webmail service provider

In a "Data Source Email" task, for a selected Event or Mailing List, all contact data fields are available for selection and inclusion in the output file. More choices are provided for selection of the linked contacts to include in the task, such as: Contacts not included in any mail task, contacts not included in "mail task X" (i.e. any mail task already created).

The output file can be viewed from within IntelliPad, and can be uploaded to the website of any webmail service provider, according to the provider's instructions.

"Mail Type Source" and "Mail Type Note" contact data fields

These fields are for use by firms required to show that contacts and clients have given permission to receive emails or mailed materials. Use of these fields is optional; they can be ignored by firms not required to show permission.

There is a Source Codes table for user definition of the Source Codes to be used; the Note is a text entry. Default values can optionally be set for all Mail Type fields, to be automatically entered for all new contacts added in Outlook or imported. Sample Default Values are shown on the following page:

+ Companies			
+ Events			
- People			
Field Name	Field Value	Req	Opt
Mail Type	Email Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mail Type Exceptions	<input checked="" type="radio"/> Allowed <input type="radio"/> Not Allowed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mail Type Source	Webpage subscription	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mail Type Note	Please enter any pertinent comments, when requesting an Override	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+ Tasks			
+ Users			

Sample Mail Type fields in Outlook. **NOTE:** These Mail Type fields can be hidden, and if shown, access to changing them can be prevented (i.e. when the default values are used).

Basic Marketing Information	
Contact Name	James Falconi
Contact Type	Prospect
Practice Area	Accounting and Consulting
Mail Type	Email Only
<small>Note: Changing the Mail Type Exceptions setting will alter the Marketing Events and M... order to see the change's effect on these sections, click the "Save Changes" button at the</small>	
Mail Type Exceptions	<input type="radio"/> Allowed <input checked="" type="radio"/> Not Allowed
Mail Type Source*	Webpage subscription
Mail Type Note*	Jim does not wish to receive any printed materials or letters

“Mail Actions Import” for contacts

Data is imported from Excel worksheets. IntelliPad provides a detailed guide to the column names, and the type of data or specific data values required in each column. Mail Actions that can be imported include:

- ✓ Mail Type field values
- ✓ Links to Events and Mailing Lists
- ✓ “Sign card” links for attorneys (e.g. for the Holiday Card mailing list)
- ✓ Override Mail Type values for specific contact-Event or contact-Mailing List links (if allowed)
- ✓ “Mail Actions” from a webmail service provider’s tracking report, in response to emails sent (e.g. Open, Bounce, OptIn, OptOut)

There is a log for each import procedure. Sample verification of file prior to import:

Verify CSV Data File Results						
The selected CSV file was parsed with the following results (only the first 10 lines are shown).						
ActionNote	ActionSource	ActionTime	ActionType	Email1Address	Events	PersonID
			Link	hackerley@band	358	
			Link	adelbertsmitter@	358	
			OptOut	pcicala@kgcoco		
			OptIn	kflorek@triggen.		
Will try to make i			Response	hklum@klumvar	358	
			Open	hdouane@balde	358	
			Open	kallen@malmov.	352	
Verified OK	Meeting with Cor		OptIn	kalaimo@yahoo.	358	

Contact, and Company, Consolidation by “Duplicate Grouping”

In Contact Consolidation, the First Name, Last Name, Email1 Address, and Company ID fields are available for use. For the names and email address, the user specifies the range of letters from A to Z as well as the number of letters that must match exactly. For Company ID, just a number range is needed.

In Company Consolidation, the letters A to Z and number of letters that must match exactly are specified for the Company Name only.

Sample Contact Consolidation using Last Name and Email 1 fields:

Select Contact Fields for Grouping					
Select the contact fields and corresponding significant character count to use for finding duplicates.					
<input checked="" type="checkbox"/> Last Name	4	<input type="checkbox"/> First Name	all	<input checked="" type="checkbox"/> Email 1	3
				<input type="checkbox"/> Company ID	
Choose the selection range in order to limit the results. Leave empty to include all.					
Last Name:	a	-	m	First Name:	-
Email 1:	a	-	z	Company ID:	-
<i>Example: Last Name 'a' - 'c' for all last names beginning with 'a' or 'b'. Last Name '' - 'bz' would yield the same result.</i>					
Allow Users in Selection					
If set, only groups with a single user will be selected.					
<input type="checkbox"/> Allow Users in Contact Selection					
				<input type="button" value="Start Duplicate Search"/>	<input type="button" value="Cancel"/>

ContactLink and IntelliPad Mobile: Popup detail information and Google address maps

The contact detail window, opened from ContactLink and IntelliPad Mobile, now includes Activity Log (Business Development) entries, Linked Attorneys (with Email link), Linked Events, Linked Mailing Lists, Past Events and Categories. Both contact and company detail windows include Created and Last Modified information. In both windows, placing the cursor over any address makes it clickable to open the Google map.

Contact Information

Contact

Mailing Address Karol xBasewood
President
xBasewood and Jones LLC
569 Park Place
Ste 50
Tucson, AZ 85712

Full Name Karol xBasewood

Job Title President

Company xBasewood and Jones LLC

Type of Work Education

Created By Attorney Jones on 07/22/15 03:26 PM

Last Modified By Attorney Smith on 01/07/16 10:35 AM

Phones

Business (520) 224-3947

Email

Email 1 kbasewood@gmail.com

Addresses

Company 569 Park Place Ste 50 Tucson, AZ 85712

Shared By

[Jones, Attorney](#) (Primary, Managing Partner) [Email](#)

Public Notes

>>> Attorney Jones wrote on 12/01/2015: First Note

Activities

Display Current Entries (1) Hide Completed Display Future Entries (2)

Start Time	Activity - Comment	User	Status
01/11/16 09:00 AM	Monthly Follow-up - Try to schedule a meeting <i>Recurrence: Repeats monthly until 9 entries have been created</i>	Jones, Attorney	Open
02/11/16 09:00 AM	Monthly Follow-up - Try to schedule a meeting <i>Recurrence: Repeats monthly until 9 entries have been created</i>	Jones, Attorney	Open

Mailing Lists

ERISA Group Client Advisory

Holiday Card

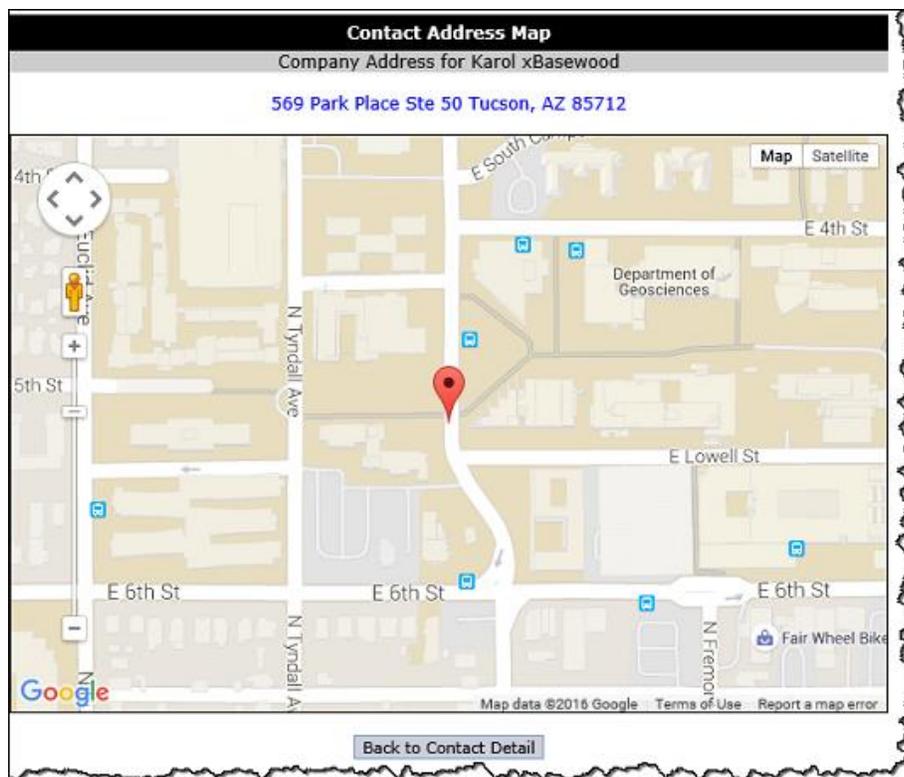
Events

02/13/16 2016 Winter Seminar 3

01/15/16 2016 Client Open House

Close
Print

After placing the cursor on the Company address and clicking:



New processing rule for automatic acceptance of new contacts

Not all firms use automatic acceptance of new contacts, from Outlook or imported. The new “IntelliMatch” rule is designed to catch more potential matches already in the IntelliPad database and thus avoid creation of duplicates. It consists of a 4 step process; in each step, the program uses a different group of data fields to try to find a match:

- ✓ Email1Address and LastName
- ✓ FirstName, LastName, CompanyName
- ✓ FirstName, MiddleName, LastName
- ✓ FirstName, LastName, MailingAddressStreet

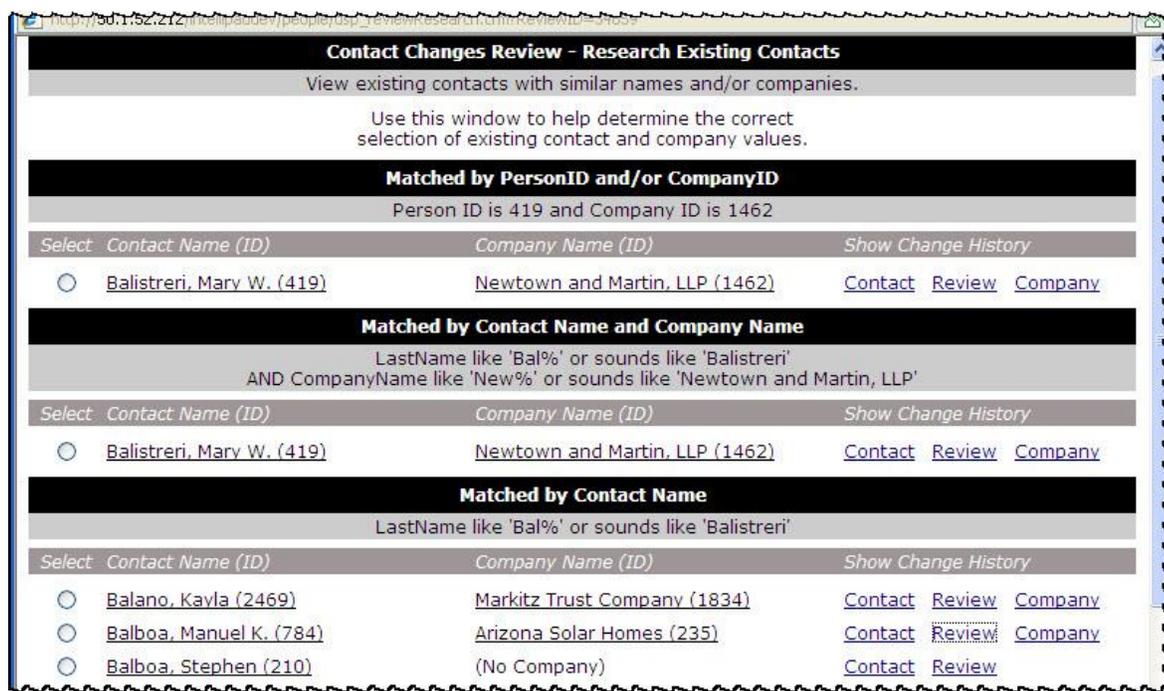
New tools added to the data steward’s review page

These are intended to assist in finding potential matches when accepting new contacts—either because they have failed the firm’s automatic acceptance rules OR if automatic acceptance is not used. In the Research window:

- ✓ The contact and company names are clickable to open the read-only detail popup windows.
- ✓ The Show Change History column includes links to the Contact, Review, and Company logs.

The Contact and Company links open the standard Changes window, with choices of Data Changes, Link Changes, and Company Name Changes; the Review link opens the Reviewed Changes log (history of new contacts/contact changes accepted from Outlook or imported).

Sample Research window:



Additional management logs provide more detailed troubleshooting

✓ Batch Cycle Messages

This log accumulates application trace messages for a single cycle; it is cleared with the start of each cycle.

✓ Outlook Tasks

This log records IntelliPad task processing that changes Outlook Contacts folders and Outlook contact records. For example: Company Name Change, Convert Forms, Outlook Duplicates, and Removed Shared.

✓ Application Trace Messages

This log is activated in the Registry Settings. It records detailed processing messages from IntelliPad COM+ Applications and the web interface.

✓ Application SQL Trace

This is not a separate log; but when activated in the Registry Settings, all the programs' SQL statements are included in the Application Trace Messages log, making it huge. This should only be activated for specific research purposes.

Partial listing of other changes and additions

- ✓ Outlook and IntelliPad: The Data Changes and Link Changes logs show the first 50 entries only; a "Show All" link is provided so the user can view more entries if desired (log entries are sorted by descending date)
- ✓ Outlook and ContactLink: "No Mail" contacts show a red text "Opt Out" if they are linked to an Event or Mailing List
- ✓ Outlook, Activity Log display: Added an option to show or hide completed entries by default
- ✓ IntelliPad: People Add Links filter includes option to "Include Users"
- ✓ IntelliPad: Added a utility to create a company record from a Custom field number value, and link it to selected contacts