# April 2017

Release 6.6.1.1 has just been released, and the major enhancements are described in this newsletter. These include: Contact restriction by Primary Attorney, Relationship Strength codes for contact-user links, saving of email messages as templates, custom field groups, and support for the ActOn® webmail service provider.

## Release Update Summary

This newsletter covers the first release provided in 2017. Highlights of the new functionality are summarized below and described in some additional detail following.

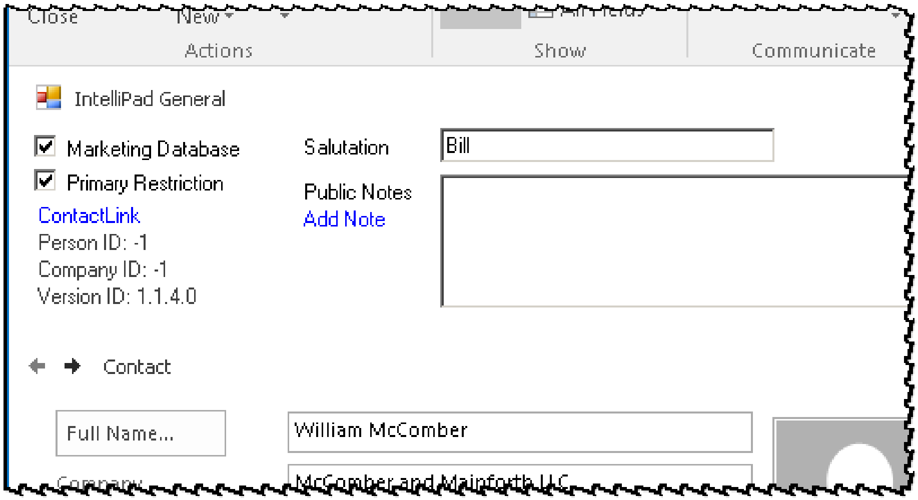
- Contact Restriction by Primary Attorney
- Relationship Strength for contact-user links
- Template messages in Email Mail Tasks
- Multiple events in notification emails to users
- Contact Link: Past Events filter by Response Code
- Contact Link: Export and print Views
- Non-Reviewed fields in Review Detail page
- Custom Field Groups
- Custom fields for Activities
- Support for ActOn® webmail service provider

## Contact restriction by Primary Attorney

In Outlook, there is a new checkbox for Primary Restriction, available for new contacts only. This checkbox and its user-defined caption appear directly below the Marketing Database checkbox. If checked, other users will not have any access to the contact, for example when searching in ContactLink or the IntelliPad Mobile application, or when running Views in ContactLink. After the contact is saved, the checkbox is disabled—it may not be unchecked, but the contact may be unshared or deleted.

In IntelliPad Edit Person, there is a red text warning at top of page that a contact is Primary Only. Administrative users may delete PO persons or remove the PO restriction, but these contacts are automatically filtered out of selections in Contact Consolidation and Change Primary User.

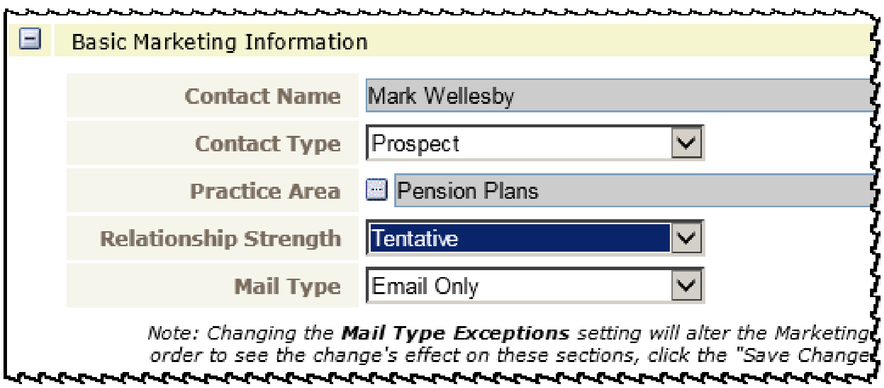
**NOTE:** Existing contacts cannot be made restricted to Primary; contact Versys for assistance in making existing contacts restricted.



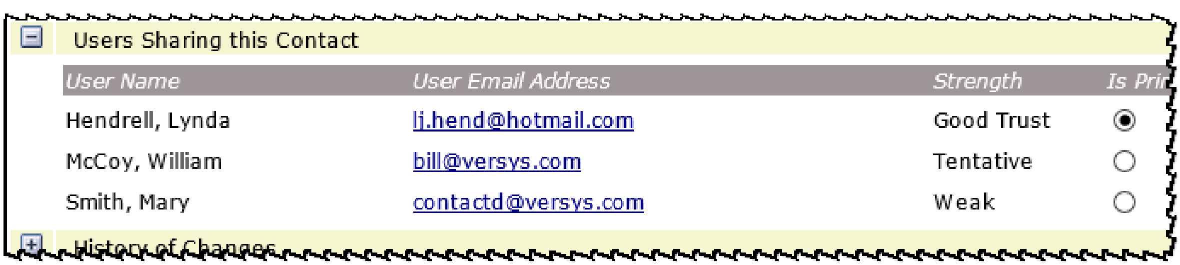

## Relationship Strength for contact-user links

There is a new Relationship Strength codes table. An RS code can be entered in Outlook, ContactLink, or IntelliPad Edit Person. The RS code can be different for each of a contact's linked users.

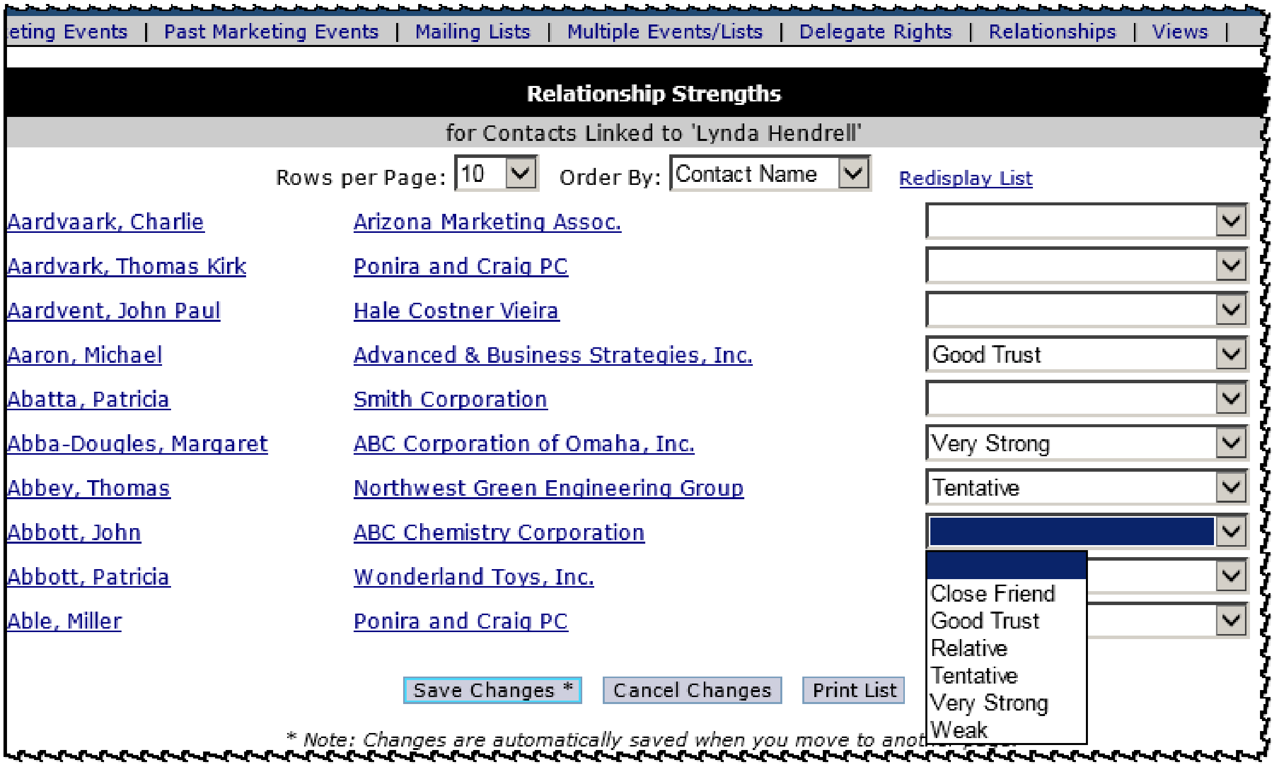
- Outlook Marketing page, Basic Marketing Section (if activated in Site Settings)



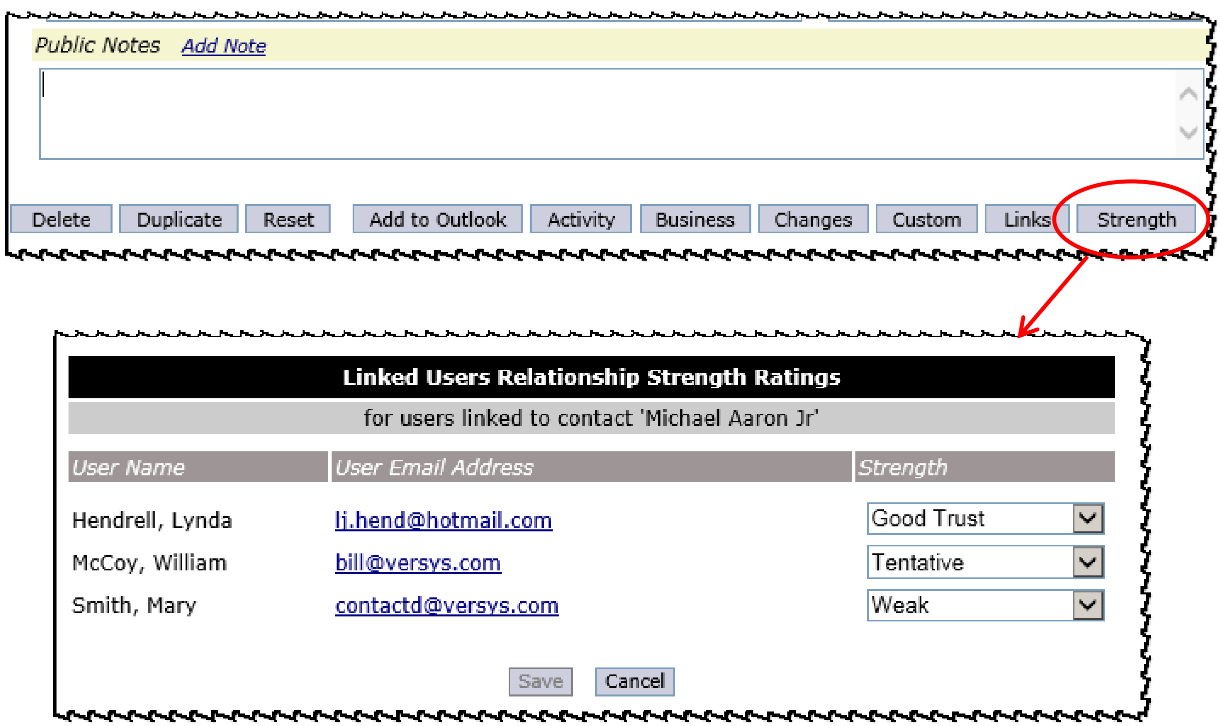

- Outlook Marketing Page, Users Sharing this Contact (read only)



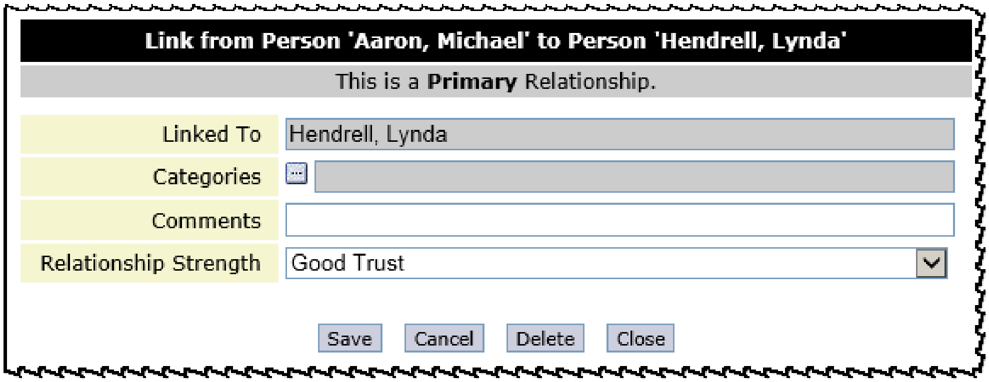
- ContactLink, new Relationships menu selection




- IntelliPad Edit Person, new Strength button

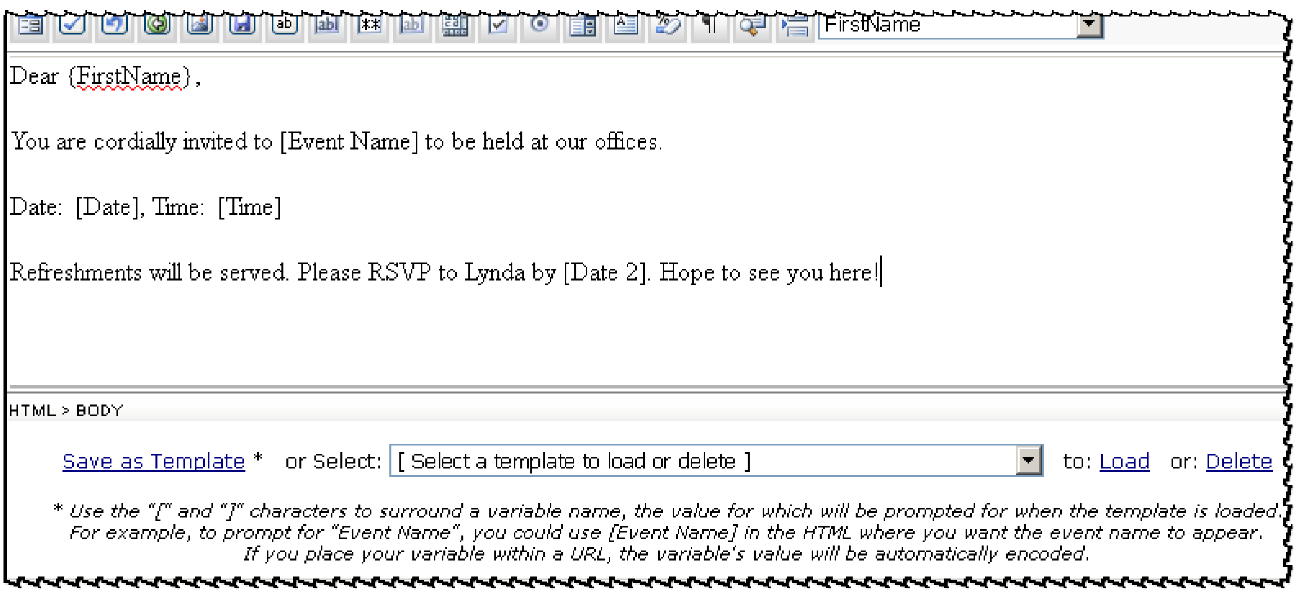


- IntelliPad, Edit Person, Links, edit a person-user link – in link details, and can be changed here

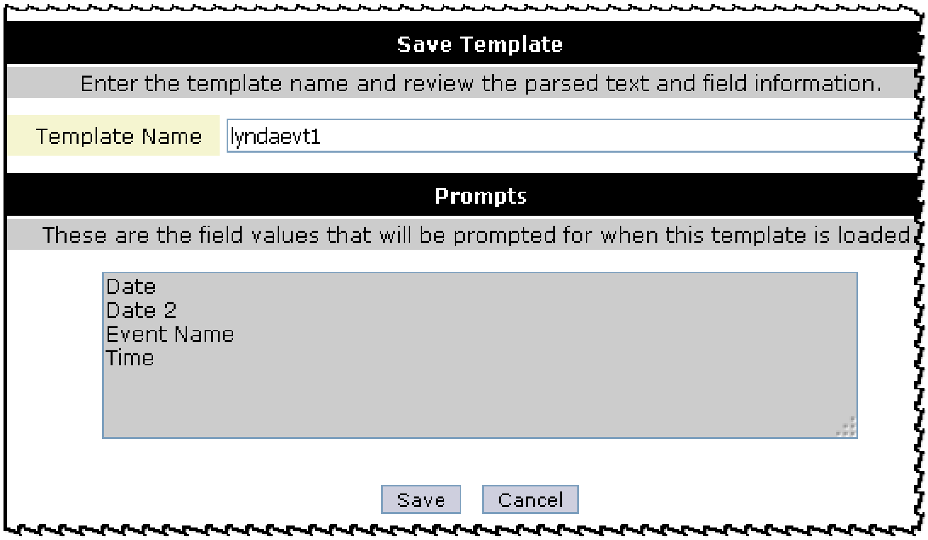



## Template messages in email mail tasks

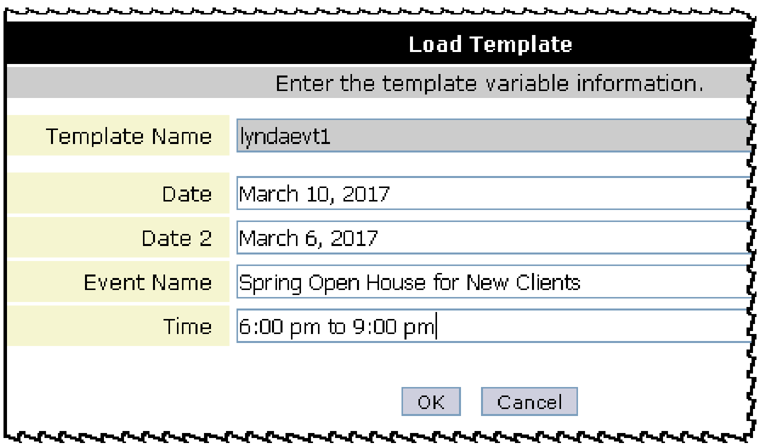
An email message can now be saved as a template, and used over and over. The message can contain all formatting, graphics, URLs, marketing automation features, encoded fields, People table variables, and prompts to be shown when the template is loaded in the future, i.e. for variable information such as an Event Name and a Date and Time. Prompts must be indicated by words in square brackets in the text, e.g. “[Event Name]”. When the message is saved as template, a popup window shows the prompts that will be used. The sample is very simple, to show the features.



After Save as Template: Users enter a name, and the prompts are shown:



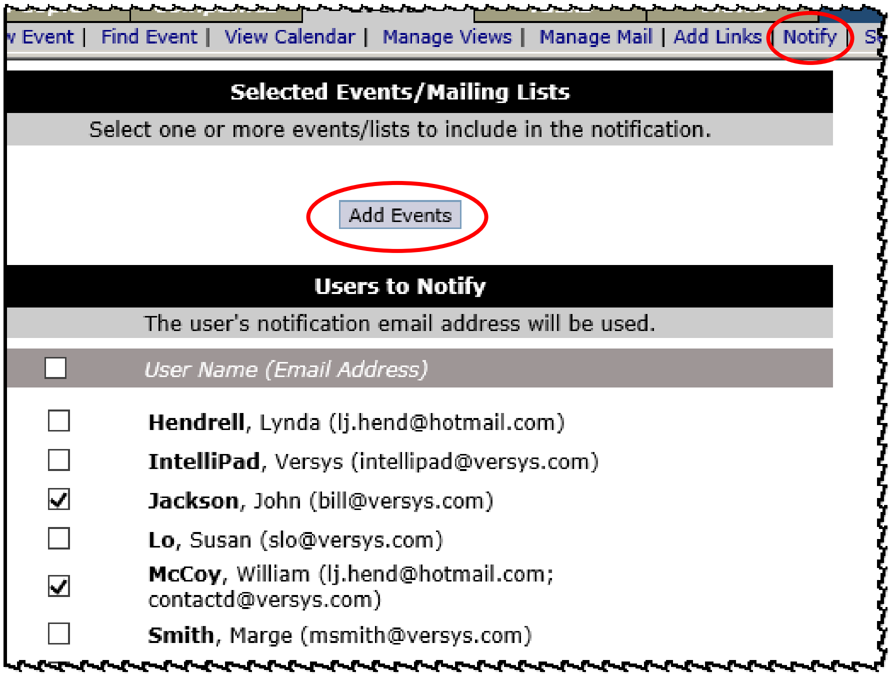

When the template is selected and Loaded in the future, prompt window showing user's entries:



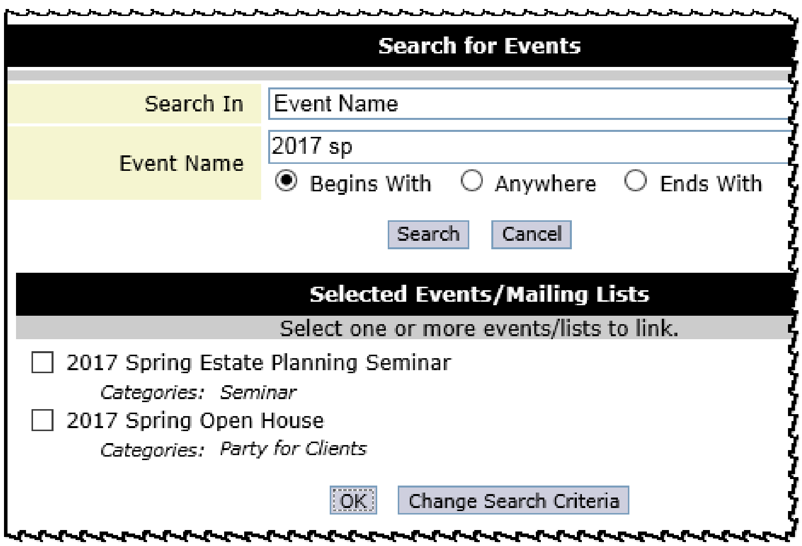

On OK, the template is loaded into the message with the prompt values.

## Multiple events in notification emails to users

The new **Notify** menu selection, in Events, enables users to select multiple Events and Lists for user notification. There is no need to edit a specific Event in order to send a notification. When the recipients click the link in their emails, the ContactLink Multiple Events/Lists feature opens, with pre-selection of the events and lists included in the Notify email.

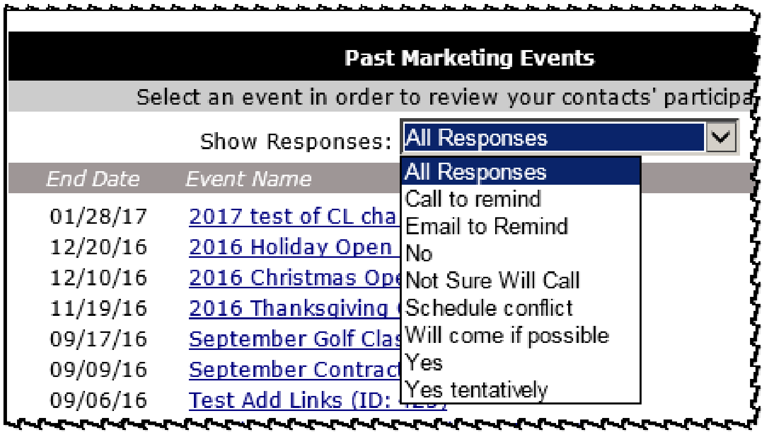



Add Events opens a search window; events or mailing lists are then chosen in the results listing.



## Contact Link:  Past Events filter by Response Code

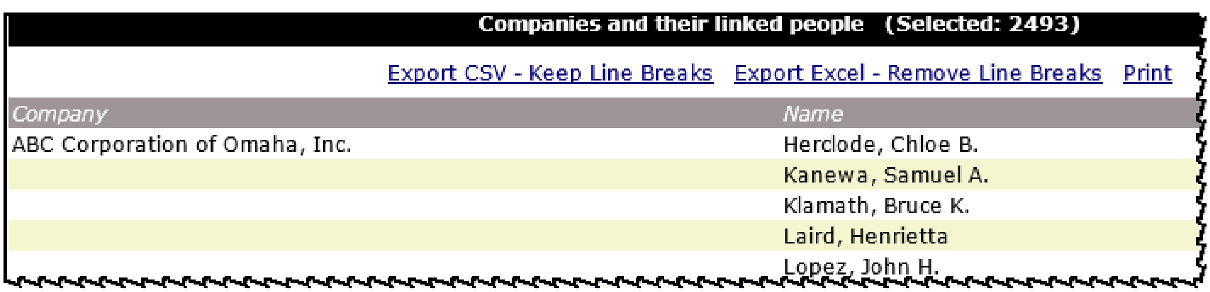
The filter choices are all the defined Response Codes. The result listing includes the Response Texts if any.





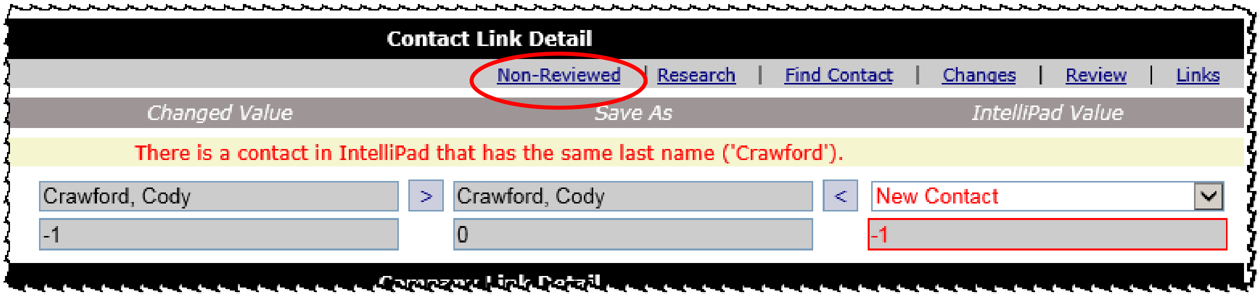
## Contact Link: Export and print Views

“Keep Line Breaks” means there will be separate lines in the file as in the View; in the example below, a line for each contact name linked to the company. “Remove Line Breaks” means that the values will be merged into one cell with separation by semicolons.

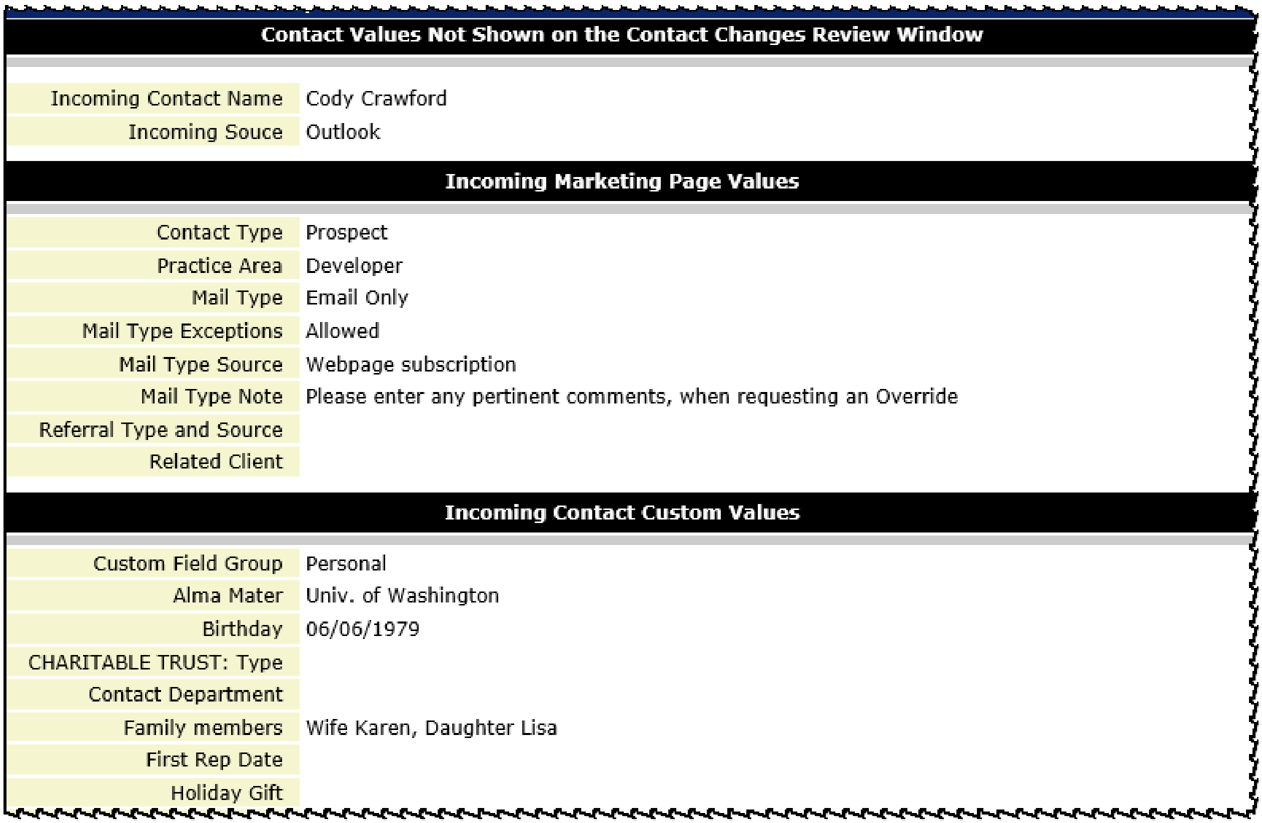


## Non-reviewed fields in Review

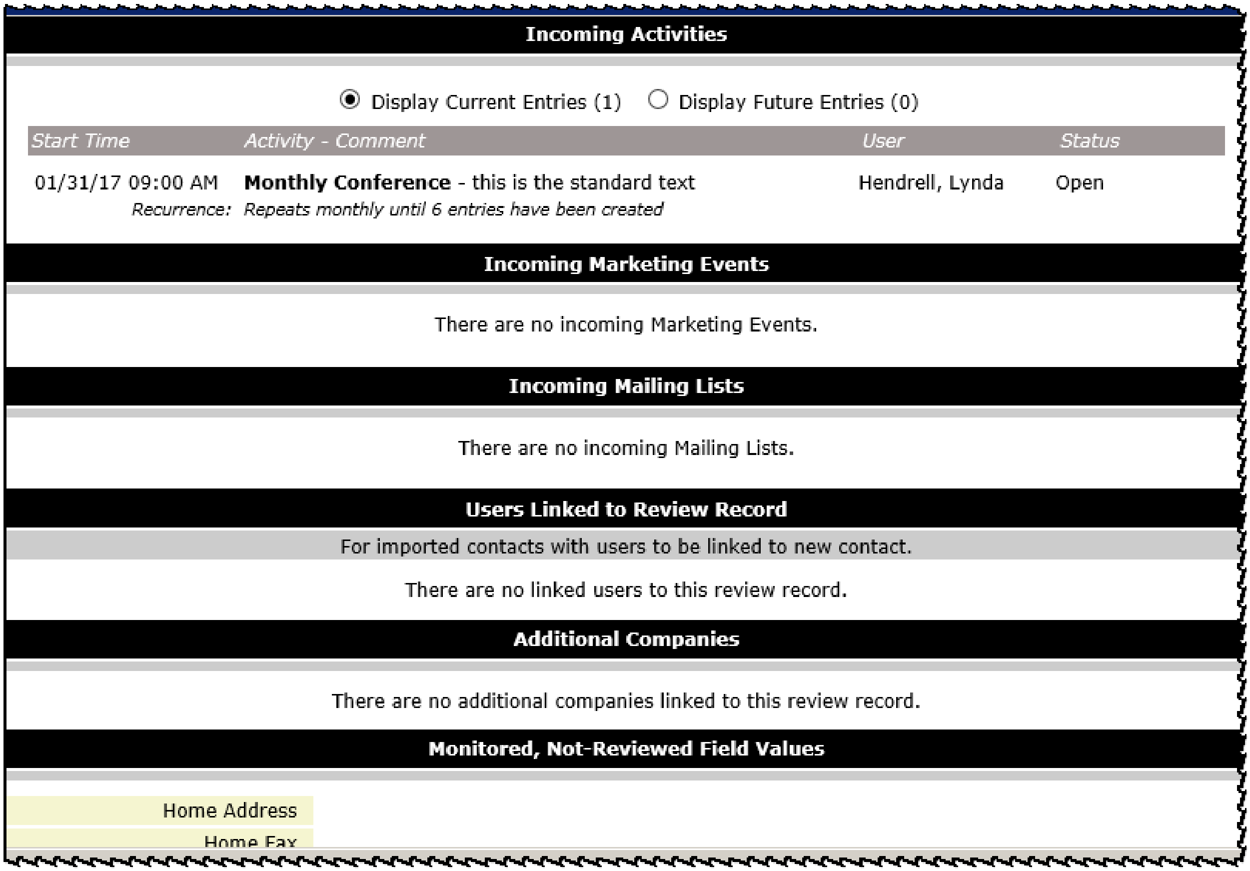
This new feature opens a window showing all non-reviewed field and Marketing page values, from Outlook or imported, for new contacts. For example:  Category, Contact Type, Referral, Activity log entries, linked Events and Mailing Lists.  The new “Non-Reviewed” link is in the Contact Link Detail section.




Sample partial window:

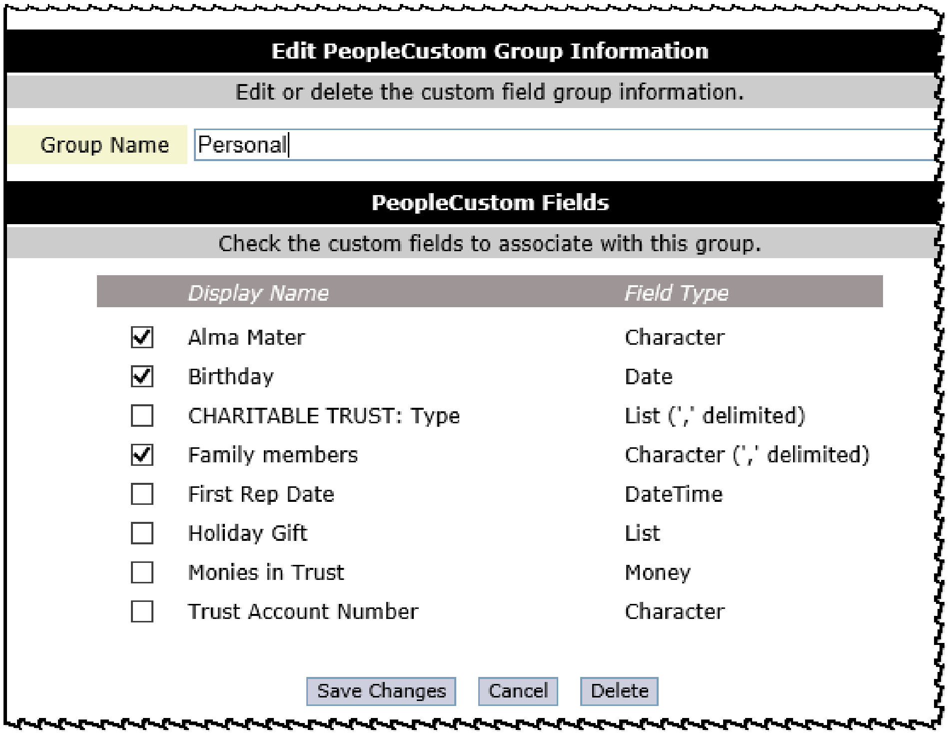


| Contact Values Not Shown on the Contact Changes Review Window | |
|---|---|
| Incoming Contact Name | Cody Crawford |
| Incoming Souce | Outlook |
| **Incoming Marketing Page Values** | |
| Contact Type | Prospect |
| Practice Area | Developer |
| Mail Type | Email Only |
| Mail Type Exceptions | Allowed |
| Mail Type Source | Webpage subscription |
| Mail Type Note | Please enter any pertinent comments, when requesting an Override |
| Referral Type and Source | |
| Related Client | |
| **Incoming Contact Custom Values** | |
| Custom Field Group | Personal |
| Alma Mater | Univ. of Washington |
| Birthday | 06/06/1979 |
| CHARITABLE TRUST: Type | |
| Contact Department | |
| Family members | Wife Karen, Daughter Lisa |
| First Rep Date | |
| Holiday Gift | |



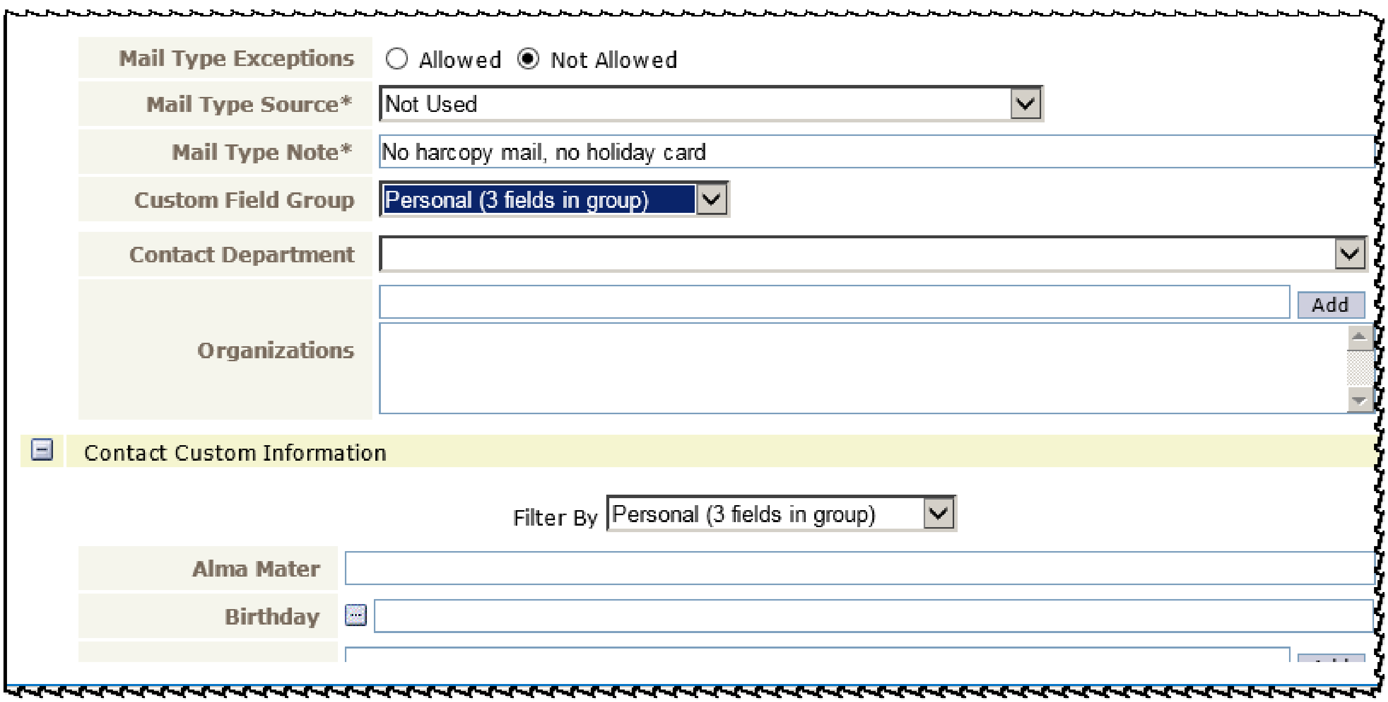

## Custom Field Groups

Custom Field Groups can be defined for all entity types, including Activity Log and Users. Custom fields are then assigned to a Group, which determines the fields shown by default in the Custom entry window. The People Custom Group can be assigned to a contact when added in Outlook, or in IntelliPad Edit Person, or can be imported.




- People Custom Group assignment

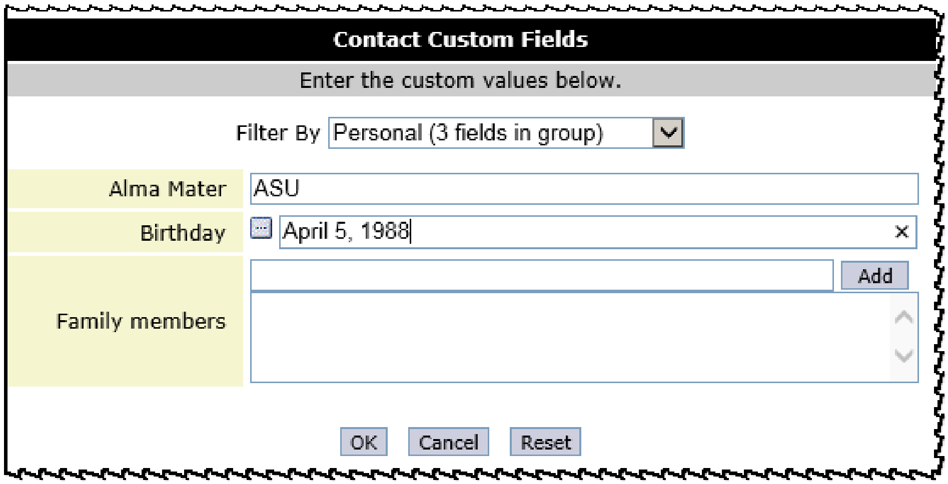
  The Custom Group assignment can be done in Outlook on the Marketing page, Basic Marketing information, when a new contact is added. After the selection, the same Group Name is automatically selected in the Filter By in the Contact Custom section (if shown).




- IntelliPad Edit Person

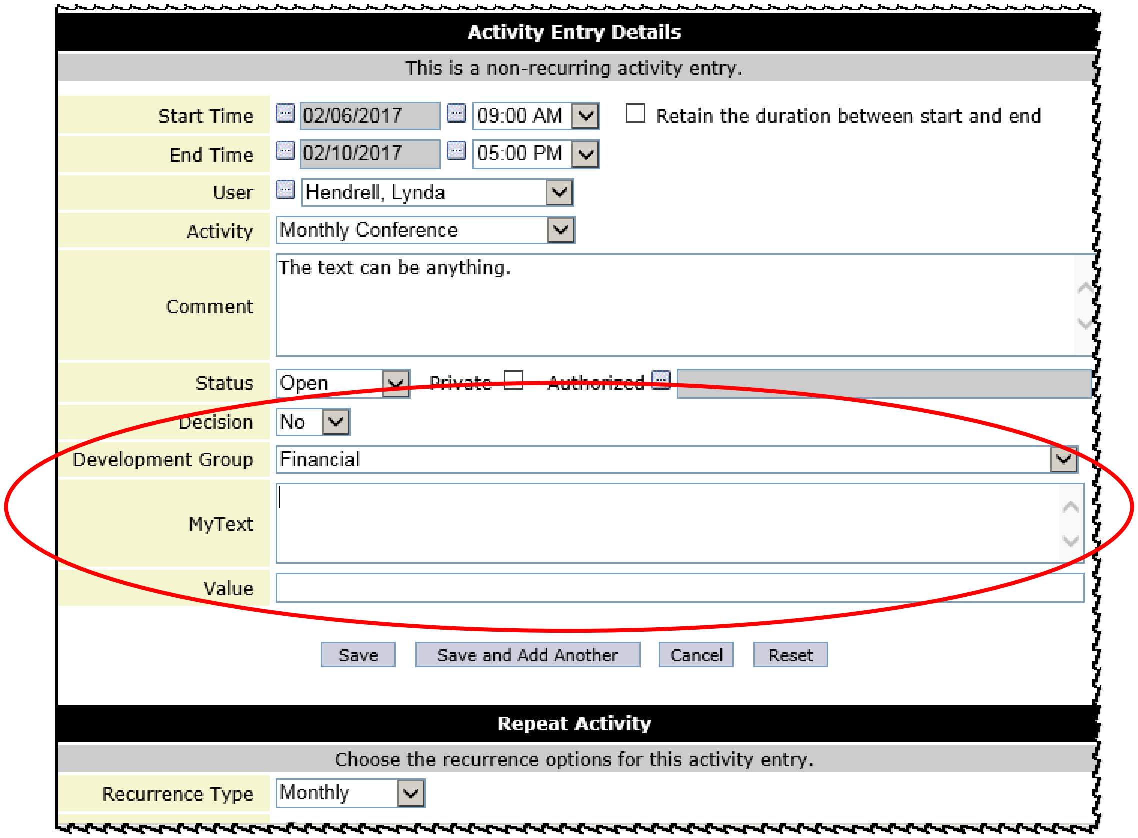
  The Group selected here will go through to IntelliPad, and will be shown in the Edit Person page. It can be changed, or originally entered, there.


The selected Group determines the custom fields shown by default in the Custom entry window; other Groups, and all custom fields, can be selected for display:



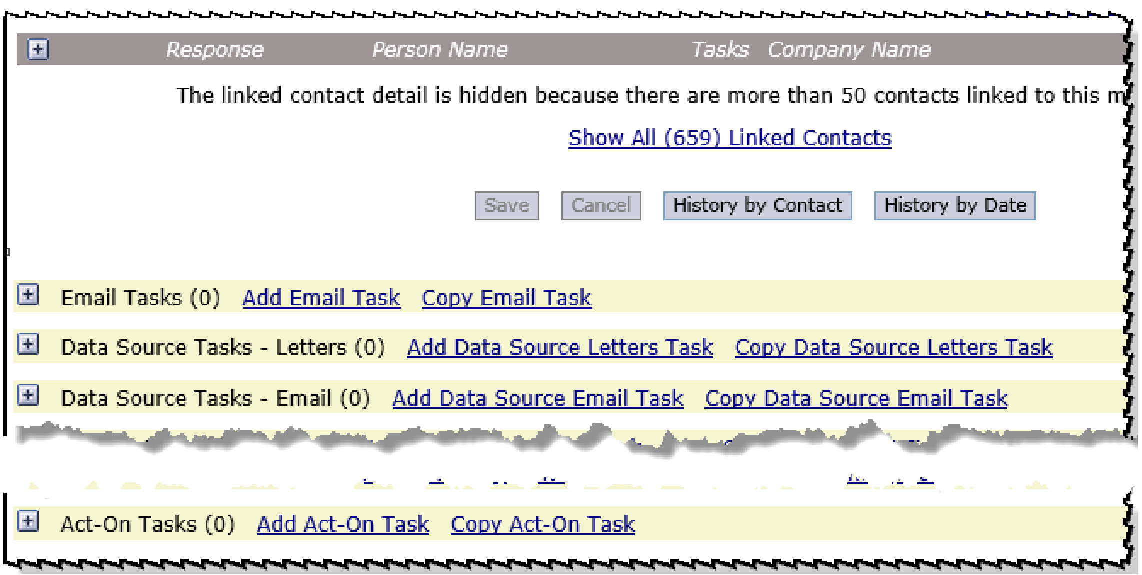

## Custom fields in Activities

Custom fields for Activities can now be defined, as well as Custom Field Groups for them. The custom fields can be shown right in the entry window, as in the sample below, or there can be a Custom button to open the popup window. If the popup window is used, there is a Filter By choice for selection of the Custom Field Group, which just determines the fields displayed.

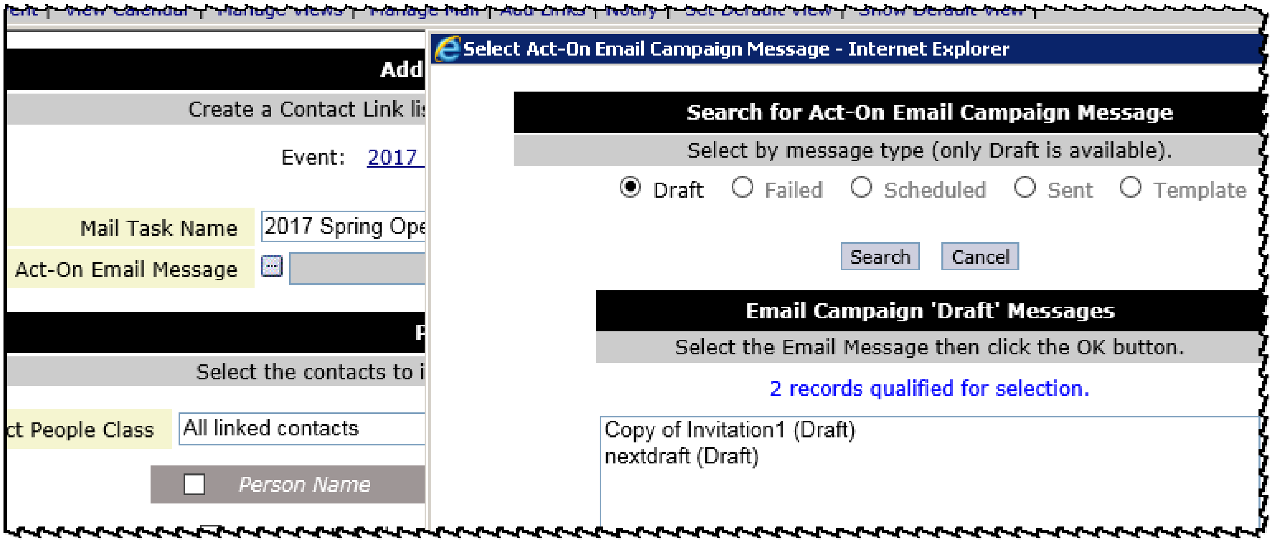



## Support for ActOn® webmail service provider

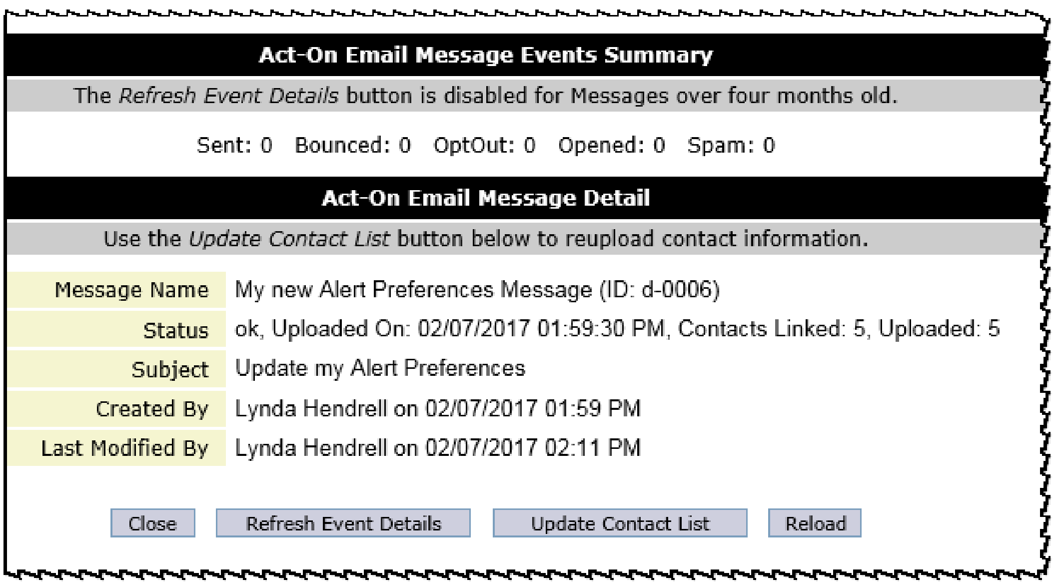
This is optional, available for a slight addition to the IntelliPad monthly maintenance fee. When present, there is an ActOn mail task type in the Mail Manager. Linked contacts are uploaded to the draft on the ActOn website; feedback data is periodically downloaded from the ActOn site, e.g. emails Opened, Bounced, OptIn, OptOut.




A Draft message must be chosen from the ActOn website; Search results are all existing Drafts:




After uploading the contacts included in the mail task, users can edit the task, then select Message Detail to see the Events Summary window:




NOTE: This is a different mail task from the example used above

A new Cold Fusion scheduled task can be defined to download data periodically from the ActOn website, so users can come to this window and Refresh Event Details to see the number Sent, Bounced, OptOut, etc. after the emails have been sent. This data is downloaded into IntelliPad tables.