

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.

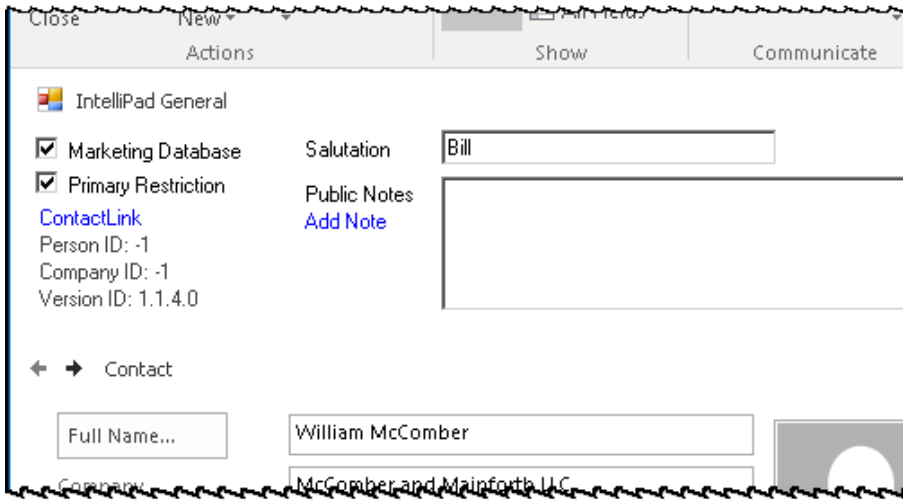
- Contact Restriction by Primary Attorney
- Relationship Strength for contact-user links
- Template messages in Email Mail Tasks
- Multiple events in notification emails to users
- Contact Link: Past Events filter by Response Code
- Contact Link: Export and print Views
- Non-Reviewed fields in Review 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.

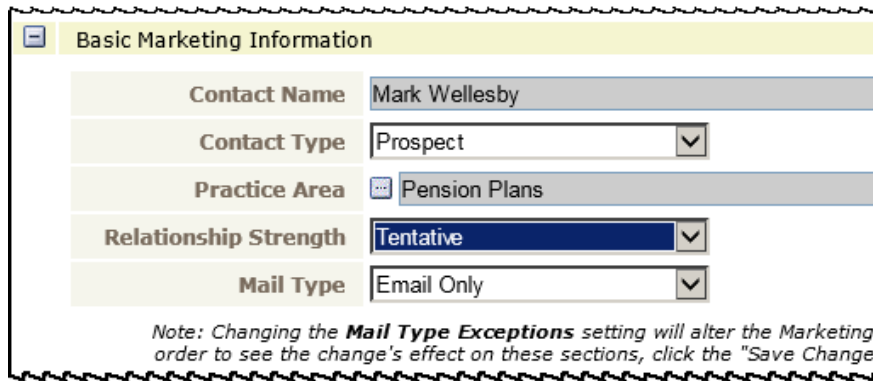
NOTE: Existing contacts cannot be made restricted to Primary; contact Versys for assistance in making existing contacts restricted.



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)

Users Sharing this Contact			
User Name	User Email Address	Strength	Is Pri
Hendrell, Lynda	lj.hend@hotmail.com	Good Trust	<input checked="" type="radio"/>
McCoy, William	bill@versys.com	Tentative	<input type="radio"/>
Smith, Mary	contactd@versys.com	Weak	<input type="radio"/>

- ContactLink, new Relationships menu selection

eting Events | Past Marketing Events | Mailing Lists | Multiple Events/Lists | Delegate Rights | Relationships | Views |

Relationship Strengths

for Contacts Linked to 'Lynda Hendrell'

Rows per Page: 10 Order By: Contact Name [Redisplay List](#)

Aardvaark, Charlie	Arizona Marketing Assoc.	<input type="text"/>
Aardvark, Thomas Kirk	Ponira and Craig PC	<input type="text"/>
Aardvent, John Paul	Hale Costner Vieira	<input type="text"/>
Aaron, Michael	Advanced & Business Strategies, Inc.	Good Trust
Abatta, Patricia	Smith Corporation	<input type="text"/>
Abba-Dougles, Margaret	ABC Corporation of Omaha, Inc.	Very Strong
Abbey, Thomas	Northwest Green Engineering Group	Tentative
Abbott, John	ABC Chemistry Corporation	<input type="text"/>
Abbott, Patricia	Wonderland Toys, Inc.	<input type="text"/>
Able, Miller	Ponira and Craig PC	<input type="text"/>

Save Changes * Cancel Changes Print List

** Note: Changes are automatically saved when you move to another page.*

- IntelliPad Edit Person, new Strength button

Public Notes [Add Note](#)

Delete Duplicate Reset Add to Outlook Activity Business Changes Custom Links **Strength**

Linked Users Relationship Strength Ratings

for users linked to contact 'Michael Aaron Jr'

User Name	User Email Address	Strength
Hendrell, Lynda	lj.hend@hotmail.com	Good Trust
McCoy, William	bill@versys.com	Tentative
Smith, Mary	contactd@versys.com	Weak

Save Cancel

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

Link from Person 'Aaron, Michael' to Person 'Hendrell, Lynda'

This is a **Primary** Relationship.

Linked To	Hendrell, Lynda
Categories	<input type="text"/>
Comments	<input type="text"/>
Relationship Strength	Good Trust <input type="button" value="v"/>

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.

Dear {FirstName},

You are cordially invited to [Event Name] to be held at our offices.

Date: [Date], Time: [Time]

Refreshments will be served. Please RSVP to Lynda by [Date 2]. Hope to see you here!

HTML > BODY

[Save as Template](#) * or Select: [Select a template to load or delete] to: [Load](#) or: [Delete](#)

* Use the "[" and "]" characters to surround a variable name, the value for which will be prompted for when the template is loaded. For example, to prompt for "Event Name", you could use [Event Name] in the HTML where you want the event name to appear. If you place your variable within a URL, the variable's value will be automatically encoded.

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

Save Template

Enter the template name and review the parsed text and field information.

Template Name lyndaevt1

Prompts

These are the field values that will be prompted for when this template is loaded

- Date
- Date 2
- Event Name
- Time

Save Cancel

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

Load Template

Enter the template variable information.

Template Name lyndaevt1

Date March 10, 2017

Date 2 March 6, 2017

Event Name Spring Open House for New Clients

Time 6:00 pm to 9:00 pm

OK Cancel

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.

[View Event](#) | [Find Event](#) | [View Calendar](#) | [Manage Views](#) | [Manage Mail](#) | [Add Links](#) | [Notify](#) | [Settings](#)

Selected Events/Mailing Lists

Select one or more events/lists to include in the notification.

Users to Notify

The user's notification email address will be used.

User Name (Email Address)

- Hendrell, Lynda** (lj.hend@hotmail.com)
- IntelliPad, Versys** (intellipad@versys.com)
- Jackson, John** (bill@versys.com)
- Lo, Susan** (slo@versys.com)
- McCoy, William** (lj.hend@hotmail.com; contactd@versys.com)
- Smith, Marge** (msmith@versys.com)

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

Search for Events

Search In:

Event Name:

Begins With
 Anywhere
 Ends With

Selected Events/Mailing Lists

Select one or more events/lists to link.

- 2017 Spring Estate Planning Seminar
Categories: Seminar
- 2017 Spring Open House
Categories: Party for Clients

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.

Past Marketing Events

Select an event in order to review your contacts' participation

Show Responses: All Responses ▼

End Date	Event Name	All Responses
01/28/17	2017 test of CL cha	Call to remind
12/20/16	2016 Holiday Open	Email to Remind
12/10/16	2016 Christmas Op	No
11/19/16	2016 Thanksgiving	Not Sure Will Call
09/17/16	September Golf Cla	Schedule conflict
09/09/16	September Contrac	Will come if possible
09/06/16	Test Add Links (ID: 1234)	Yes
		Yes tentatively

Start Date: 09/09/16 End Date: 09/09/16 Event Default Mailing Address: not selected

Rows per Page: 10 ▼ Order By: Contact Name ▼ [Redisplay List](#)

		Override	Contact Name	Company Name
+	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Aaron, Michael <i>Response: Yes - verified attended</i>	Advanced & Business Strategies, Inc.
+	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abatta, Patricia <i>Response: Yes - verified attended</i>	Smith Corporation
+	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abba-Douglas, Margaret <i>Response: Yes - verified did attend</i>	ABC Corporation of Omaha, Inc.

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.

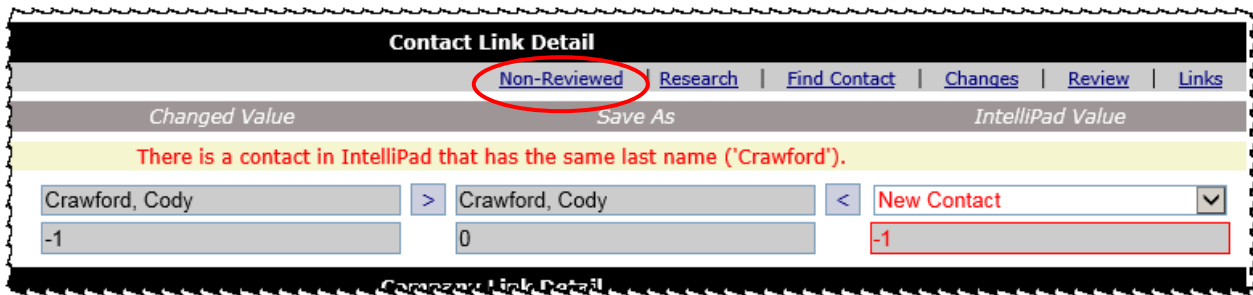
Companies and their linked people (Selected: 2493)

[Export CSV - Keep Line Breaks](#)
[Export Excel - Remove Line Breaks](#)
[Print](#)

Company	Name
ABC Corporation of Omaha, Inc.	Herclode, Chloe B.
	Kanewa, Samuel A.
	Klamath, Bruce K.
	Laird, Henrietta
	Lopez, John H.

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:



Incoming Activities

Display Current Entries (1)
 Display Future Entries (0)

Start Time	Activity - Comment	User	Status
01/31/17 09:00 AM	Monthly Conference - this is the standard text <i>Recurrence: Repeats monthly until 6 entries have been created</i>	Hendrell, Lynda	Open

Incoming Marketing Events

There are no incoming Marketing Events.

Incoming Mailing Lists

There are no incoming Mailing Lists.

Users Linked to Review Record

For imported contacts with users to be linked to new contact.

There are no linked users to this review record.

Additional Companies

There are no additional companies linked to this review record.

Monitored, Not-Reviewed Field Values

Home Address
Home Fax

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.

Edit PeopleCustom Group Information

Edit or delete the custom field group information.

Group Name

PeopleCustom Fields

Check the custom fields to associate with this group.

	<i>Display Name</i>	<i>Field Type</i>
<input checked="" type="checkbox"/>	Alma Mater	Character
<input checked="" type="checkbox"/>	Birthday	Date
<input type="checkbox"/>	CHARITABLE TRUST: Type	List (',' delimited)
<input checked="" type="checkbox"/>	Family members	Character (',' delimited)
<input type="checkbox"/>	First Rep Date	DateTime
<input type="checkbox"/>	Holiday Gift	List
<input type="checkbox"/>	Monies in Trust	Money
<input type="checkbox"/>	Trust Account Number	Character

- 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).

Mail Type Exceptions Allowed Not Allowed

Mail Type Source* Not Used ▼

Mail Type Note* No harcopy mail, no holiday card

Custom Field Group Personal (3 fields in group) ▼

Contact Department _____ ▼

Organizations _____ Add

Contact Custom Information

Filter By ▼

Alma Mater _____

Birthday

- 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.

Activity Entry Details

This is a non-recurring activity entry.

Start Time	<input type="text" value="02/06/2017"/>	<input type="text" value="09:00 AM"/>	<input type="checkbox"/> Retain the duration between start and end
End Time	<input type="text" value="02/10/2017"/>	<input type="text" value="05:00 PM"/>	
User	<input type="text" value="Hendrell, Lynda"/>		
Activity	<input type="text" value="Monthly Conference"/>		
Comment	<input type="text" value="The text can be anything."/>		
Status	<input checked="" type="checkbox"/> Open	<input type="checkbox"/> Private	<input checked="" type="checkbox"/> Authorized
Decision	<input type="text" value="No"/>		
Development Group	<input type="text" value="Financial"/>		
MyText	<input type="text"/>		
Value	<input type="text"/>		

Repeat Activity

Choose the recurrence options for this activity entry.

Recurrence Type	<input type="text" value="Monthly"/>
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Support for ActOn® webmail service provider

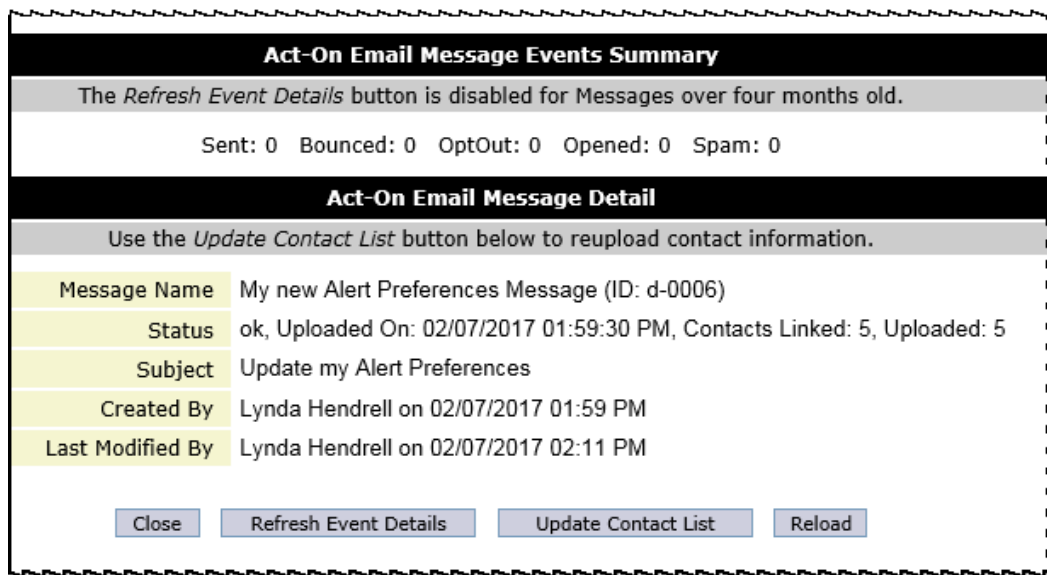
This is optional, available for a slight addition to the IntelliPad monthly maintenance fee. When present, there is an ActOn mail task type in the Mail Manager. Linked contacts are uploaded to the draft on the ActOn website; feedback data is periodically downloaded from the ActOn site, e.g. emails Opened,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

Response	Person Name	Tasks	Company Name
The linked contact detail is hidden because there are more than 50 contacts linked to this m Show All (659) Linked Contacts			
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="History by Contact"/> <input type="button" value="History by Date"/>			
<input type="checkbox"/>	Email Tasks (0)	Add Email Task	Copy Email Task
<input type="checkbox"/>	Data Source Tasks - Letters (0)	Add Data Source Letters Task	Copy Data Source Letters Task
<input type="checkbox"/>	Data Source Tasks - Email (0)	Add Data Source Email Task	Copy Data Source Email Task
<input type="checkbox"/>	Act-On Tasks (0)	Add Act-On Task	Copy Act-On Task

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.