

IntelliPad CRM from Versys Software, Inc.

Email Consent Management with Integrated Landing Pages

For Canadian Law Firms, it is important to carefully manage email consent as it relates to the expiration of Implied Consent. Firm contacts should be given an opportunity to continue receiving alerts and publications prior to the expiration. And, lawyers should have visibility of recent and upcoming expirations related to their contacts. IntelliPad has been enhanced to accommodate each of these requirements.

With IntelliPad, the Email Consent status can be set to Unknown, Implied, Express, or Withdrawn. For the Canadian Anti-Spam Law (CASL), Implied Consent expires two years after the last invoice for any of the client relationships for a contact. And, if a stricter email policy is desired, the email consent status of “Implied” can be removed.

IntelliPad also offers options to control which mailing methods are allowed based on the Email Consent status or to further comply with contact requests. For example, some contacts may only want to receive letters, others may only want to receive emails. Email Consent information is visible and editable in Outlook as well as the web interface and changes are fully audited. On the extra Outlook IntelliPad tab for a contact, Accounting Client Relationships can be added and displayed as shown below.



The most recent of the Last Invoice Dates for each contact is used to determine the Implied Consent Expiration (24 months later). Former employers of contacts, although the Accounting Client Relationship is active for other contacts at the firm, do not affect a contact's Implied Consent expiration.

With an optional number of days before the expiration, emails (designed by the firm) are sent to contacts providing them a clickable link to continue receiving emails for alerts/publications from the firm. At the same time, they can update any of their contact information.

This update from the contact and the automated import to the CRM database is accomplished with IntelliPad integrated landing pages which are displayed on the firm's website. An example is shown on the next page.

It is extremely important to provide access to landing pages with a very high level of security. Although the contact interacts with the firm website and normal firm page headings and footings, the live information is accessed via a Versys web service with HTTPS security and highly encrypted content. The encryption is applied to the identity of your firm, the identity of any existing contact, and the identity of any Topic or Mailing List. More technical information is available upon request.

Registration

Thank you for joining our mailing list. We look forward to keeping you informed.

Email *

First Name *

Last Name *

Job Title *

Company *

Email Lists (please select at least one) *

- Business Litigation
- Business Transactions
- Employment - Arizona
- Employment - California
- Employment - Nevada
- Employment - Utah
- Insurance Law
- P&F General News

Security Check *
To complete your subscription, please click in the box to the left of the wording *I'm not a Robot*.

I'm not a robot


reCAPTCHA
Privacy - Terms

* Denotes required field.

IntelliPad Landing Pages are easily added to your firm's website pages for both existing and new contacts.

✓ Existing contacts: receive emails with a clickable link

Emails can be sent directly by IntelliPad or via integration with Constant Contact, Emma, or Act-On

- For updating their contact information
- To see and modify subscription/alert preferences
- To unsubscribe from all mailings
- To respond to RSVP requests

✓ New contacts: website visitors

- To add their contact information and subscription/alert preferences
- To sign up for any event which does not need an invitation

Versys Software, Inc.

Versys Software and its predecessor company have a long history of providing high quality products accompanied by full service to clients in the legal community. Prior to focusing on the legal profession in 1985, the company developed professional billing software for the medical profession, full accounting and project management software for construction companies, and inventory and parts management for the auto dealership business. This varied background provided the basis for the development of the Legal Insight billing, accounting, and practice management software – and more recently, the IntelliPad CRM software.

The company is headquartered in San Francisco, with support offices in New Jersey, Massachusetts, South Dakota, and Arizona. On-site and web-based consulting and training are available for new software installations and support services. Our clients consistently report that our staff is friendly, capable, and responsive.



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