

# IntelliPlus Module Summary

## September 2021

The IntelliPlus module provides counts of emails sent and received, and Outlook calendar meetings, for all or selected user Outlook folders. These statistics are visible in both ContactLink and the web interface; a more detailed “Email Stats” menu selection is available ContactLink. Two optional features are Email Address Review and Email Text Parsing. With Email Review, users are notified the first time an email is received from, or sent to, an address; the user can approve or deny this address for future email counts (i.e. to keep personal email out of the count). With Text Parsing, the texts and text signature blocks of logged (approved) emails are scanned for possible new contacts by looking at job titles and company names.

### Descriptions and sample screens, web interface

#### Communications

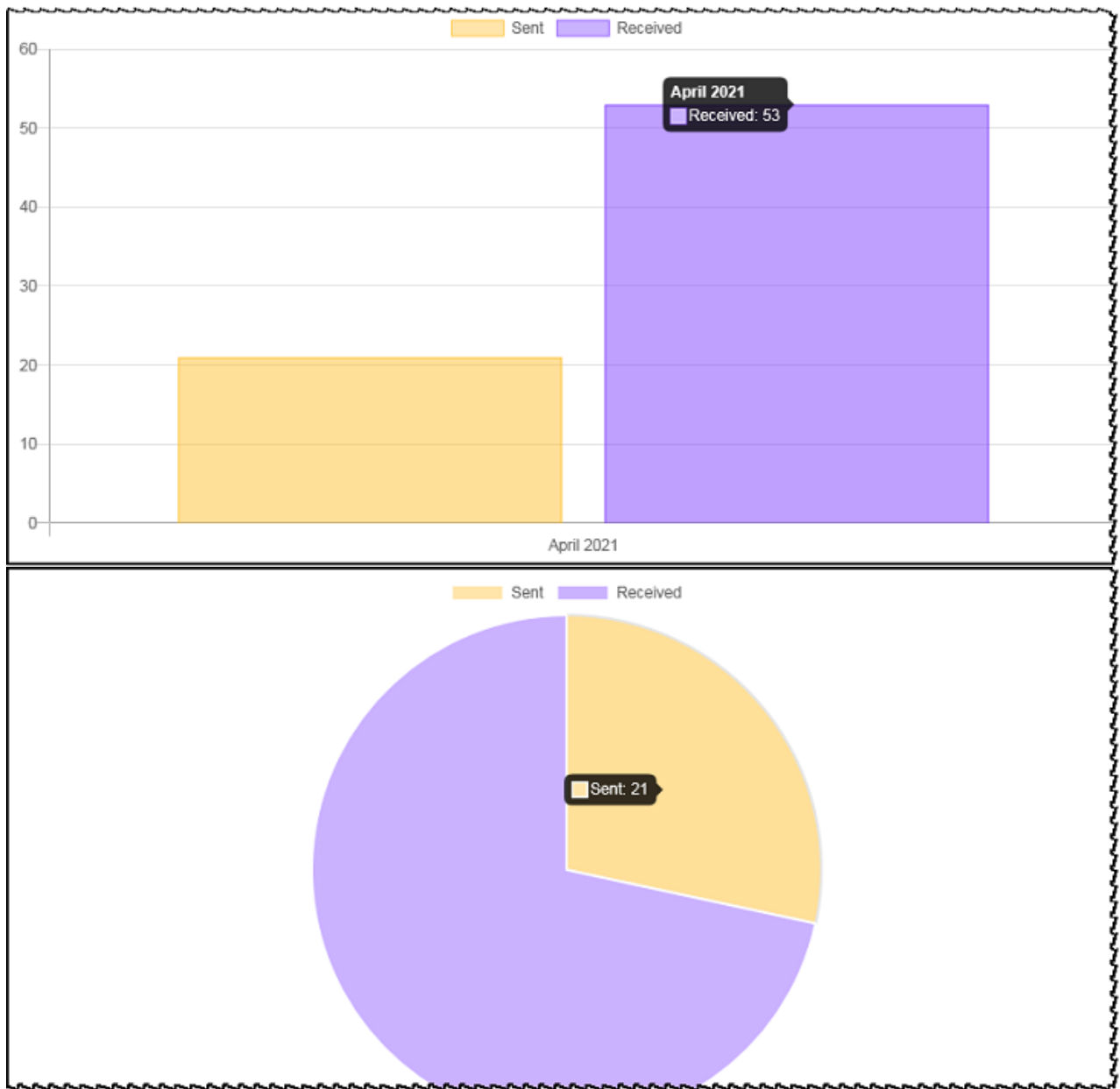
This feature is available in the web interface and in ContactLink. IntelliPlus provides the additional data types Email Sent, Email Received, and Meetings (if Calendar folders are monitored). Optional contact selection choices are Job Title, Contact or Company Category, Company City or State, and Company Name; these can be used in combinations.

Drilldown is available from each color bar in the graph, for that month only, and from each color section in the pie graph, for all selected time periods. The example on page 2 is for one month only. (The sample data is not realistic.)

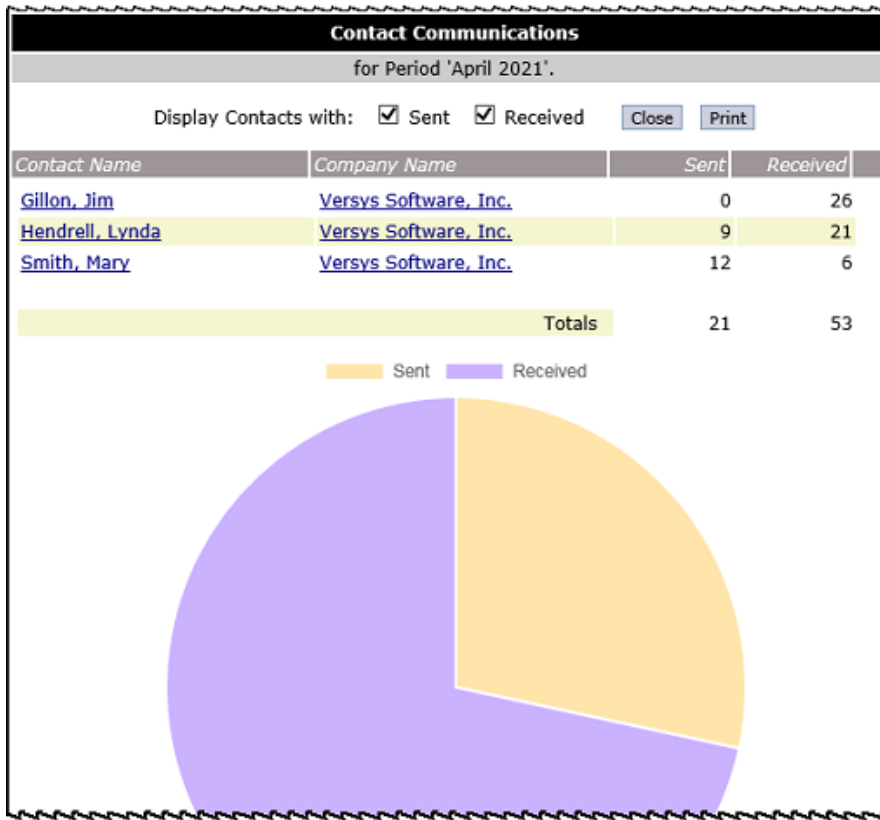
Hovering the pointer over a color bar, or pie section, shows a “tip” with the total. Clicking a bar or section opens the drilldown window of totals by contact, which provides contact detail drilldown as well. Example drilldown screens are on page 3.

The screenshot displays the 'Contact Communications Discovery' web interface. It features a dark blue header with the title. Below the header is a 'Data Options' section with a grey background, containing the instruction 'Chose the data and time range to include. You may select multiple data types.' This section includes a 'Select All' link and several checkboxes for data types: Invited, Attended, Mailing, Activity, Email Sent (checked), Email Received (checked), and Meetings. Below these are radio buttons for 'Current' (Year, Quarter, Month) and 'Last' (Year, Quarter, Month, 12 Months, 6 Months, 3 Months). The 'Add Contact Selection Option' section has a grey background and the instruction 'Click on a button below to add corresponding selection criteria.' It contains six buttons: Job Title, Contact Category, Company Category, Company State, Company City, and Company Name. The 'Contact Selection Options' section has a grey background and the instruction 'These are the current selection criteria. Click a criteria button to remove the qualification.' It includes a 'Select All Contacts' link and two buttons: Show Chart and Print.

Show Chart display on page 2:



Drilldown window on page 3:



(limited test data only)

**Contact Import and Review for Email Text Parsing records**

If Email Text Parsing is used: The program reads the texts and text signature blocks of (approved) emails received by participating users, and creates potential new contact records in the imports table. These records are imported automatically, if used, or are available for manual import. After import, they go to review like any other imported contact records; the data steward can accept them like any other new contacts, or do the research if there are potential matches in the database.

IntelliPad includes Job Title and Company Name “Suffix” tables to help the program identify potential contacts; each firm can add to these tables as desired. (A company name must have a suffix in the table in order to be recognized by the program as such; only job titles in the Suffix table can be recognized.) Sample partial Company Name Suffix table:

IntelliPlus uses company suffixes when parsing email text. When a line of text ends with a value in the CompanySuffixes table, then the line is assumed to be a company name and used accordingly. For example, if you create the suffix *co-op* and the program processes a line *The XYZ Co-Op*, then the line is considered a company name and will be associated with any contact information found in the text, and the program will start looking for a contact name if not yet found.

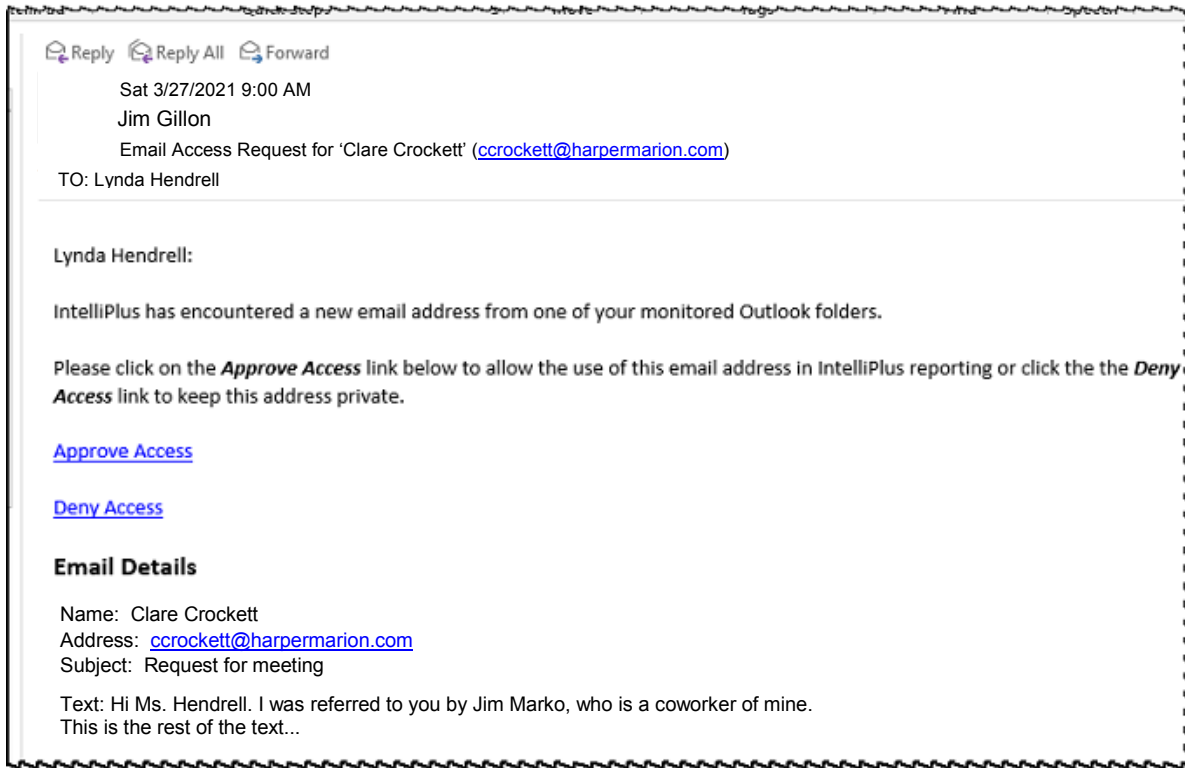
**IntelliPlus Company Suffixes**  
You may add or delete suffixes, as needed.

- academy
- accounting
- advertising
- aeronautical
- affairs
- agency
- agribusiness
- airlines
- antiques
- apartments
- architects
- assoc
- associates
- association

## Descriptions and sample screens, Outlook and ContactLink

### Email Address Review

This is an optional feature. When an email is received from, or sent to, a new address: IntelliPad sends an email to the user asking to Approve or Deny this address. If Approved, this and future emails will be included in the user's count of emails sent and received. If Denied, this and all future emails will not be included (i.e. personal emails). A time limit can be set, so that if the user does not Approve or Deny within 3 days (for example), the email address will be Approved automatically. Users can be allowed to change the Approved or Denied status of email addresses in ContactLink (see page 6). Sample email from IntelliPad:



**NOTE:** Email addresses of users' linked contacts can be automatically approved—initially and on an on-going basis—by means of a scheduled task.

### ContactLink Communications

IntelliPlus provides the additional data types Email Sent, Email Received, and Meetings (if Outlook Calendars are synchronized). Optional contact selection choices are: Job Title, Contact or Company Category, Company City or State, and Company Name; these can be used in combinations. Drilldown is available from each color bar in the graph, for that month only, and from each color section in the pie graph, for all selected time periods. Further drilldown to contact detail is available from the first drilldown window.

Please refer to pages 1 – 3 above for sample screens.

### ContactLink Email Stats

IntelliPlus adds the Email Stats menu selection, which displays a grid of color-coded email numbers Sent and Received, and Meetings (if Calendars are monitored), by time period, for all the user's linked contacts and their companies. The default numbers for each strength category are set in the web interface. **NOTE:** Sample contains limited test data.

Search | Marketing Events | Past | Mailing Lists | Past | Multiple Events | Delegates | Communications | **Email Stats** | Relationships | Views |

## Contact Communications

Very Weak Weak Medium Strong Very Strong

### Contact Email and Meetings

Your contact email activity for the last 12 months.

Contact Name	Email Address	Month to Date			Last 3 Months			Last 12 Months		
		Sent	Received	Meet	Sent	Received	Meet	Sent	Received	Meet
<a href="#">Anthony, Michael T.</a>	<a href="mailto:lj.hend@hotmail.com">lj.hend@hotmail.com</a>	0	0	0	0	0	0	1	0	0
<a href="#">Gillon, Jim</a>	<a href="mailto:jim@versys.com">jim@versys.com</a>	0	0	0	1	25	0	1	34	0
<a href="#">Hendrell, Lynda</a>	<a href="mailto:lynda@versys.com">lynda@versys.com</a>	0	0	0	0	1	4	0	1	8
<a href="#">Smith, Mary</a>	<a href="mailto:contactd@versys.com">contactd@versys.com</a>	0	0	0	10	6	0	13	8	0

### Company Email and Meetings

Your summarized company email activity for the last 12 months.

Company Name	Month to Date			Last 3 Months			Last 12 Months		
	Sent	Received	Meet	Sent	Received	Meet	Sent	Received	Meet
<a href="#">Laramie Productions, Inc.</a>	0	0	0	0	0	0	1	0	0
<a href="#">Versys Software, Inc.</a>	0	0	0	11	32	4	14	43	8

[Edit Email Strengths](#)
[View IntelliPlus Folders](#)
[View Email Approval](#)
[View Email Log](#)

Click the email address to open Communications Discovery for that contact; click the contact or company name to open the detail window.

**Edit Email Strengths** enables each user to change the number of emails in each category, e.g. weak, medium, strong.

**View IntelliPlus Folders** opens a window showing which Outlook folders are being monitored; an optional feature is allowing users to add or remove folders. First sample on page 6.

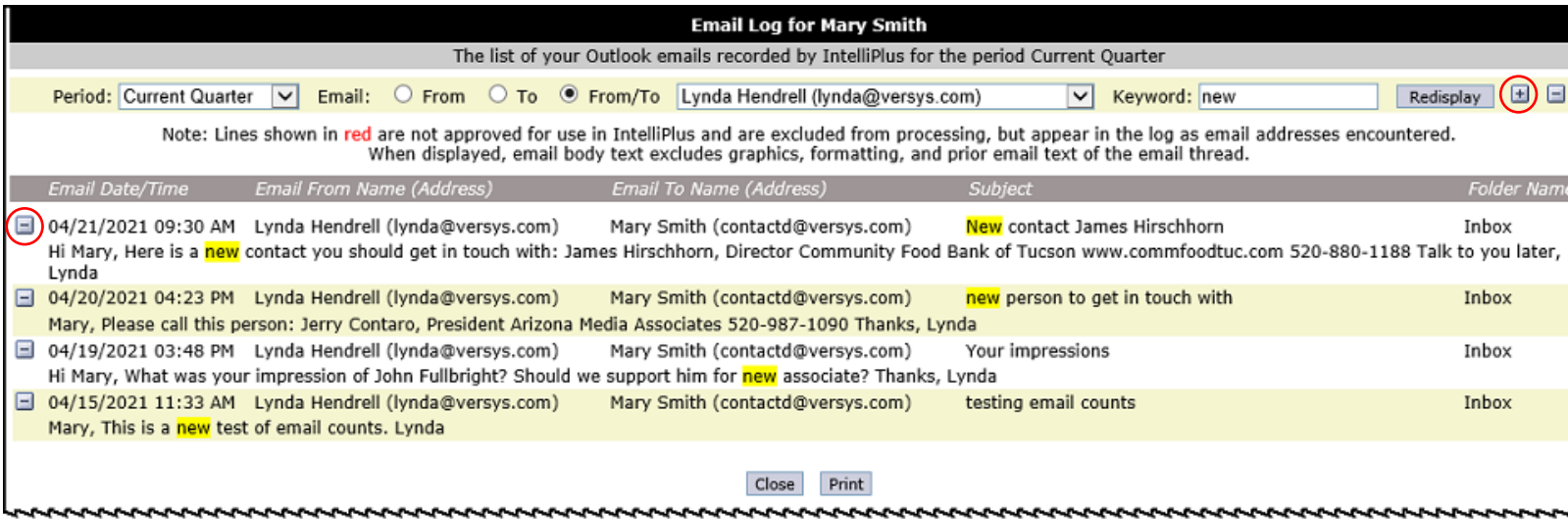
The optional **View Email Log** opens the list of emails sent and received with selection by Period and filter by From, To, or both From/To, Email Address, and Keyword (in email subject and/or text). A system setting determines if only the email subject, or both subject and text, are archived.

If both subject and text are archived, users can open the full text of all, or any individual, email. Second sample on page 6.

**NOTE:** All screens have limited test data only.



Select Other Folders opens a window of the user's other existing Email folders, if any.



The sample data is just emails to/from staff members; actual logs will contain emails to/from the user's linked contacts and all other addresses (both approved and denied). The sample shows both subject and text being archived; firms can choose to archive the subject only. If text is archived: The [+] button at top right opens the text for all emails in the list; the [+] button at left margin opens it for that email only. With a Keyword search, the word(s) will be highlighted in the email Subject (and Text, with all texts opened, as shown above).

If the Email Address Review feature has been activated, there is a **View Email Approval** button to open a window where the user can see which email addresses are Pending, Approved, Denied; change of status is available.

