IntelliPad CRM Product Development in 2021 - 2022

Release 7.1.0.1 introduces the new Business Development Opportunities functionality, so that firms can identify and pursue potential new business using traditional sales pipeline features such as practice group, pipeline status, probability, and tracking of related activities. The Opportunity features are described in Appendix 1.

The release's other major enhancement provides two new graphical presentations of data: Communications Discovery—statistics on communications with contacts including business development activities, and CRM Implementation Discovery—statistics on CRM utilization by attorneys compared to firm averages. Both are visible in the web interface as well as ContactLink; a contact level Communications Discovery is available on the Outlook Marketing page.

In addition, new features have been added to the Outlook Marketing page, Contact Changes Review, Events, Email Mail Tasks, Custom Fields, and Export Management. All 7.0.5.1 patches are included. This release also introduces the Chromium version of the Outlook Add-in; firms wanting to discontinue use of IE please contact Versys for more information.

A new IntelliPlus module is available which is not included in the base IntelliPad software. IntelliPlus logs emails sent and received for all or selected user Outlook folders, and captures meetings from the Outlook calendars. The resulting statistics are visible in both the web interface and ContactLink as part of the new Communications Discovery graphs. IntelliPlus optionally scans the texts of emails received for potential new and changed contact information (referred to as "signature scraping") and submits such contacts for import, review and acceptance. A separate IntelliPlus Summary document is available upon request.

Enhancements in Outlook

- **Business Development Opportunities**

  This is a new section on the Marketing page. An Opportunity represents the effort for specific business the firm is hoping to win, whether a new client or additional services for an existing client. When adding a new contact, or editing a contact, users can add a new Opportunity for them. Please refer to Appendix 1 for more information.

- **Discover Contact Communications**

  This new feature on the Marketing page provides bar and pie graph presentations of statistics on the contact's Invited, Attended, Mailings, and Activities for the previous 12 months. Drilldowns from the graph display include detail mail tasks, events attended, and activities.

- **Activity Log for Business Development**

  -- Name changed to "Business Development Activities"

  -- Express Entry

  This convenience feature allows users to enter activities for any date, but without the creation of recurrences (i.e. regardless of Activity Code). There can be a default Express Activity Code from a new Site Setting.

  -- "Retain duration..." check box removed

  The End Time defaults to an hour after Start Time, and can be changed.

  -- Opportunity selection

  If the contact is linked to one or more Opportunities: An Opportunity can be chosen for the activity.

- **No auto search for matches, or prompt to search, for shared contacts**

  If all new contacts are shared by default, or when users check the Marketing box to share a new contact: The automatic search for matching contact and company names, or the prompt to search, can now be disabled.

- **Company Name Change prompt window**

  The wording of the choices was changed to clarify the intent: Move just the one contact to the new company name, or rename/fix the spelling of the company name, to affect all contacts linked to it.

- **Link details shown for Marketing Events and Mailing Lists**

  Each firm can decide which link detail fields to show in both Outlook and ContactLink; there are default settings with event level overrides. For example: Only show the Categories and Override Salutation. Custom link fields are not shown unless selected by specific Event or Mailing List.

Enhancements in Contact Link

- **New menu design**

  The menu design is now the same as in the IntelliPad web interface: Tabs for the menu names, and each tab has a sub-heading line of horizontal menu selections. (This is needed because of the number of new menu selections.)

- **Opportunities**

  As described on page 1, an Opportunity represents the effort for potential new business. Users can add or edit Opportunities here, and then link other users, contacts, and uploaded documents to them. Each user sees a list of his or her linked and active Opportunities. My Opportunity Discovery provides bar and pie graph presentations of statistics. Practice Group Opportunity Discovery is available to users who are Leaders of at least one Practice Group. Please refer to Appendix 1 for more information.

- **Communications Discovery**

  This new menu selection provides bar and pie graph presentations of statistics on all contacts Invited, Attended, Mailings, and Activities. Selection criteria include current or last year periods, with additional filters such as Job Title, Category, and Company City or State. Drilldowns from the graph display include totals by contact, and detail mail tasks and activity log entries by contact.

- **Show Charts links**

  Contact and Company Detail windows include “Show Charts” links, which open the new Communications feature.

- **CRM Implementation Discovery**

  This new selection on the Views menu provides bar and pie graph presentations of the Firm Average and User totals of Outlook contacts, Shared contacts, linked to Events and Mailing Lists, and Follow Up (Business Development Activities).

- **Attorney name in heading of Marketing Event and Mailing List pages**

  Shown with the number of contacts, for easy verification when ContactLink is opened from a notification email.

- **Link details shown for Marketing Events and Mailing Lists**

  As described for Outlook, above.

Enhancements in the web interface

- **Opportunities menu**

  The Opportunity features are the same as described above for ContactLink. Please refer to Appendix 1 for information.

- **Communications Discovery**

  This new report (Views) provides bar and pie graph presentations of statistics on contacts Invited, Attended, Mailings, and Activities. Selection criteria include current or last year periods, with additional filters such as Job Title, Category, and Company City or State. Drilldowns from the graph display include totals by contact, and detail mail tasks, and activity log entries, by contact. (It is the same as in ContactLink.)

- **CRM Implementation Discovery**

  The new report (Views menu) displays bar and pie graphs of the totals of Outlook contacts, Shared contacts, links to Events and Mailing Lists, and Follow Up (Activities). Selections are by time period, and by Average Firm, User, or both. The goal is to show trends by comparing attorneys to firm averages within selected time period.

- **Contact Changes Review**

  - Review record flags with color-coding

    The data steward can set flags for review records as applicable. The types are Manual Required, High Priority, Researching, Awaiting Response, and Other. Flagged records cannot be chosen for automatic processing.

  - Link contacts to Events, Mailing Lists

    The Outlook Marketing Page can optionally be made available, enabling the data steward to link new (or existing) contacts to Events and Mailing Lists prior to acceptance, e.g. when new contacts came from Outlook, or were imported, without any links.

  - Detail page

New message about the number of matches, with limited display in the New Contact dropdown; Email Addresses moved up to the Name section, right below Salutation.

- **Custom field display**

  Custom fields can be displayed right on the new/edit pages for People, Companies, Events, Tasks, and Users—instead of the Custom button with an associated popup. New Site Settings control this display for each record type.

- **Link details shown for Marketing Events and Mailing Lists**

  The link detail fields to be shown for Events and Mailing Lists, in both Outlook and ContactLink, are chosen in new Site Settings; overrides by Event are available. Custom link fields to show are now selected ONLY by individual Event or Mailing List.

- **Allow All Mail Types for Event**

  This Event level setting means that all linked contacts will be included in all mail tasks, of all types, for the Event, regardless of their personal mail type settings. No link level mail type overrides are required.

- **Email Mail Tasks**

  - New option for Duplicate Email Addresses: Unique Addresses Only. When there are multiple persons with the same email address, the program will select just the one with the lowest PersonID (i.e. oldest).
  - The new content editor has a simplified toolbar, but provides all the same features as the prior editor; it can be used with all browsers including IE.

- **Copy Datasource Mail Task**

  The new mail task name, not the copied one, is shown; the People Selection is all linked people from the new mail task not the copied one.

- **Categories and Codes for Opportunities**

  The “Area of Practice” name has been changed to just “Practice”, for use in the new Practice Groups (users assigned to a Practice code) which are assigned to Opportunities. New codes for use in Opportunities are: Pipeline Status, Probability (with percentage), and Doc Type (for uploaded documents). New Categories are Opportunities, OpportunitiesDocs (for uploaded documents), and OpportunitiesPeople (for additional contacts linked to Opps).

- **Export Management options**

  The updated screen includes Options such as Submitter, Status, Contains, and Sort.

Enhancements in Outlook: Descriptions and Sample Screens

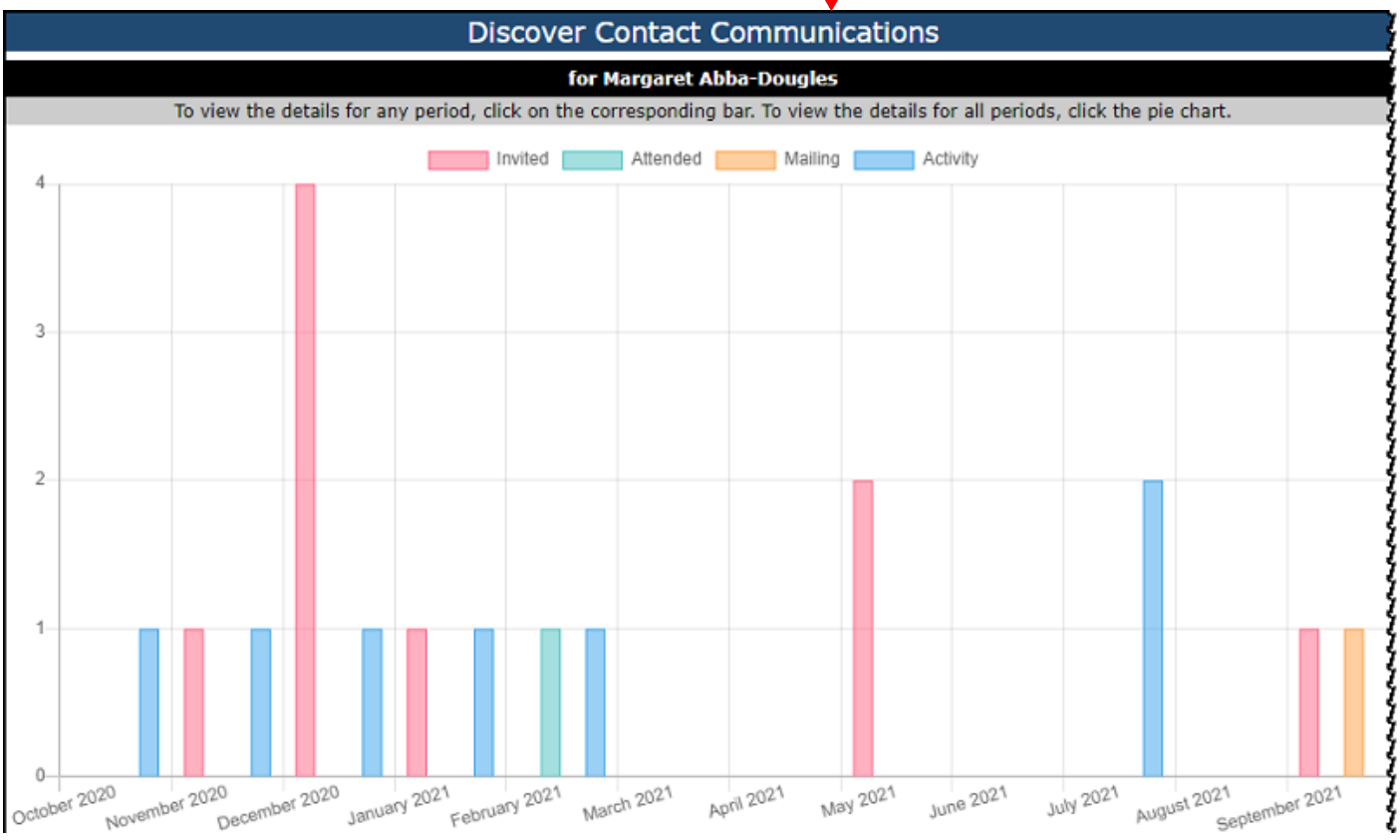
Business Development Opportunities

This is a new section on the Marketing page. Please refer to Appendix 1 for information.

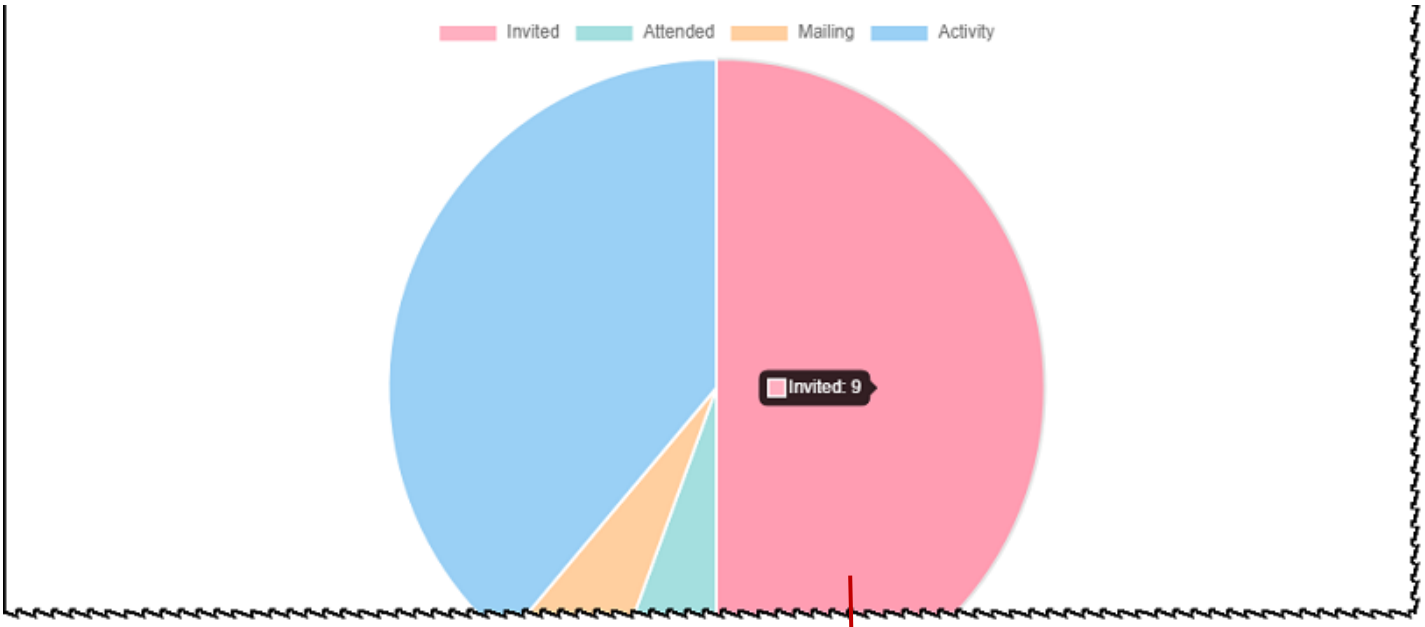
Discover Contact Communications

This feature, on the Marketing page, provides bar and pie graph presentations of statistics on the contact's Invited, Attended, Mailings, and Activities for the previous 12 months. Drilldowns from the graph display include detail mail tasks, events attended, and activities.

NOTE: If the optional IntelliPlus module is present, Email Sent and Received, and Outlook Meetings, are included.



Pie graph section on page 5. Hover the pointer over a color bar, or pie section, to see a "tip" showing the total number; click the bar, or pie section, to open the drilldown window shown in second screen on page 5.



Discover Contact Communications

Contact: Margaret Abba-Dougles Company: Alpha Beta Insurance Group

for the last 12 months, October 2020 through September 2021

Return to Discover Contact Communications | Print | Expand All | Collapse All

Invited (9)

Attended (1)

Event Name	*Location*	*Start Date*	*End Date*	*Task Date*
2021 Winter Small Business Conference	Second floor conference	02/20/2021 01:00 PM	02/20/2021 04:00 PM	02/18/2021 10:16 AM

Mailing (1)

Event Name	*Location*	*Start Date*	*End Date*	*Task Date*
20-21 Firm Newsletter	Mailing List			09/23/2021 02:53 PM

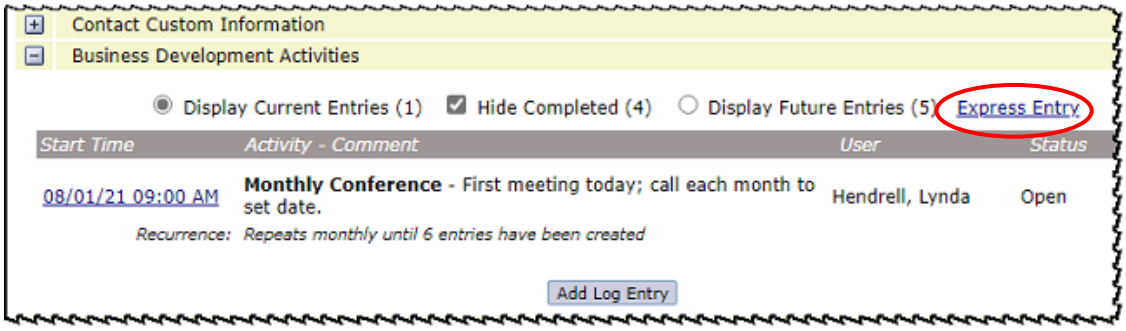
Activity (7)

Start Time	*Activity Creator*	*Description - Comment*	*Status*
10/03/20 01:00 PM	Hendrell, Lynda	**Monthly Conference** - standard monthly conference, can be over the phone or FaceTime	Completed
11/03/20 01:00 PM	Hendrell, Lynda	**Monthly Conference** - standard monthly conference, can be over the phone or FaceTime	Completed

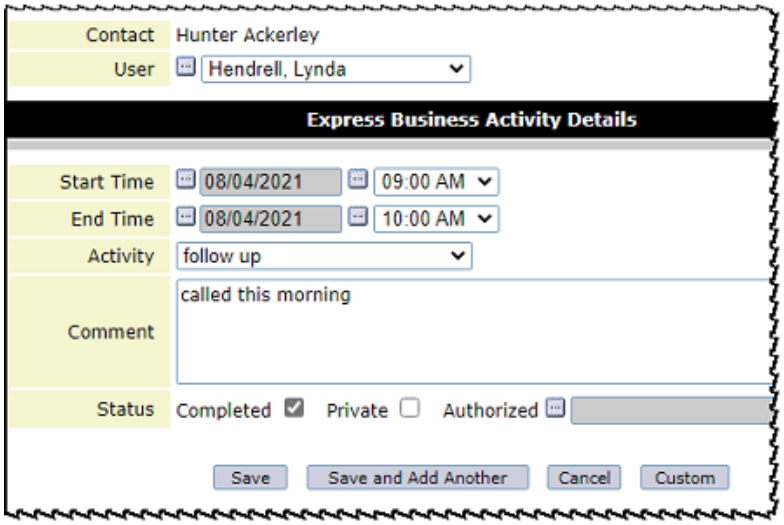
NOTE: The Activity Start Time is clickable to open the read-only details.

Express Entry for Activities

The section name was changed to “Business Development Activities”. This link at top of the section is a convenience feature used to add activities for any date—typically ones already completed—but with no recurrences created (i.e. regardless of the Activity Code).

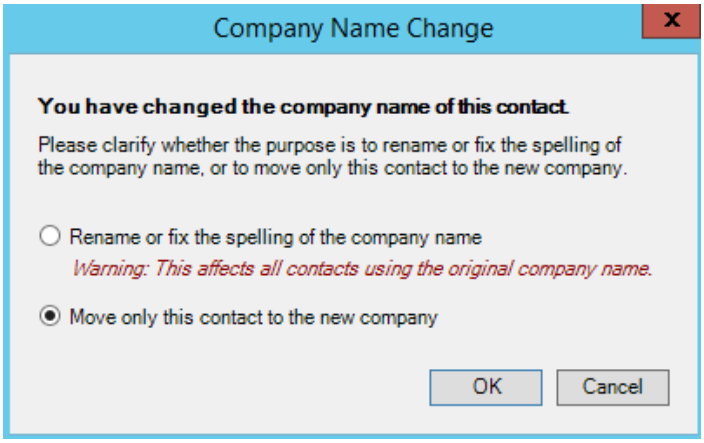


In the Add window, there can be a default Activity Code from a new Site Setting. The “Retain duration between start and end” check box has been removed; the End Time default value is an hour after the Start Time, and can be changed as desired. There is no recurrence section at bottom of the page, below the buttons, as in a regular log entry.



Company Name Change prompt

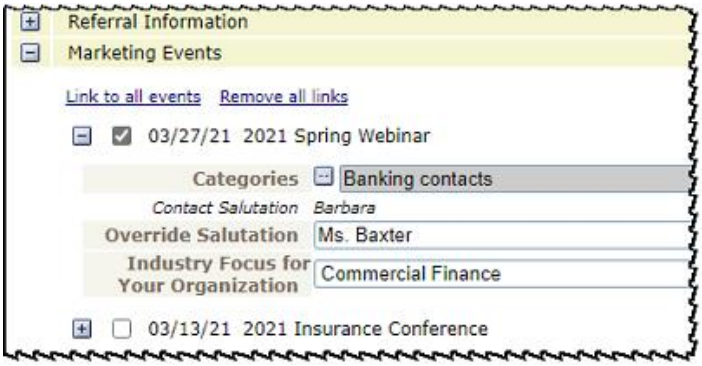
The wording of the choices was changed to clarify the intent: Move just the one contact to the new company name, the default, or rename/ fix the spelling of the company name, to affect all contacts linked to it:



Link details in Marketing Events and Mailing Lists

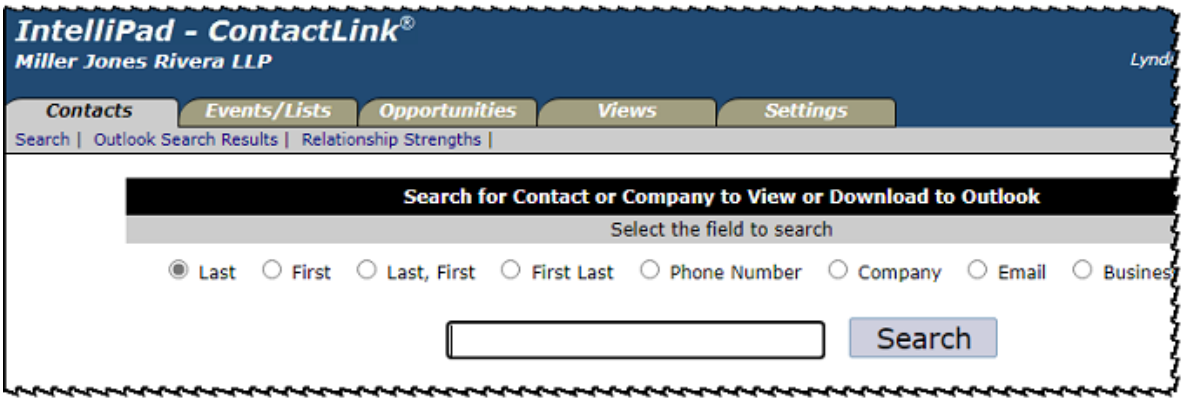
Each firm can decide which link detail fields to show in both Outlook and ContactLink—there are default Site Settings with Event level overrides. For example: Events can have different fields than Mailing Lists. The custom Person-Event link fields to show are only selected by individual Event or Mailing List, so users in Outlook and ContactLink don't need to see all those custom fields all the time.

Sample Outlook Marketing Events link details, showing Categories and Override Salutation only, and one custom field:



Enhancements in ContactLink: Descriptions and Sample Screens

New menu design



The Views menu contains the new Communications and CRM Implementation Discovery, IntelliView Reports, and Email Stats (only with IntelliPlus module). The Settings menu just contains the Delegates choice.

Opportunities

Please refer to Appendix 1 for information on this new menu and its selections.

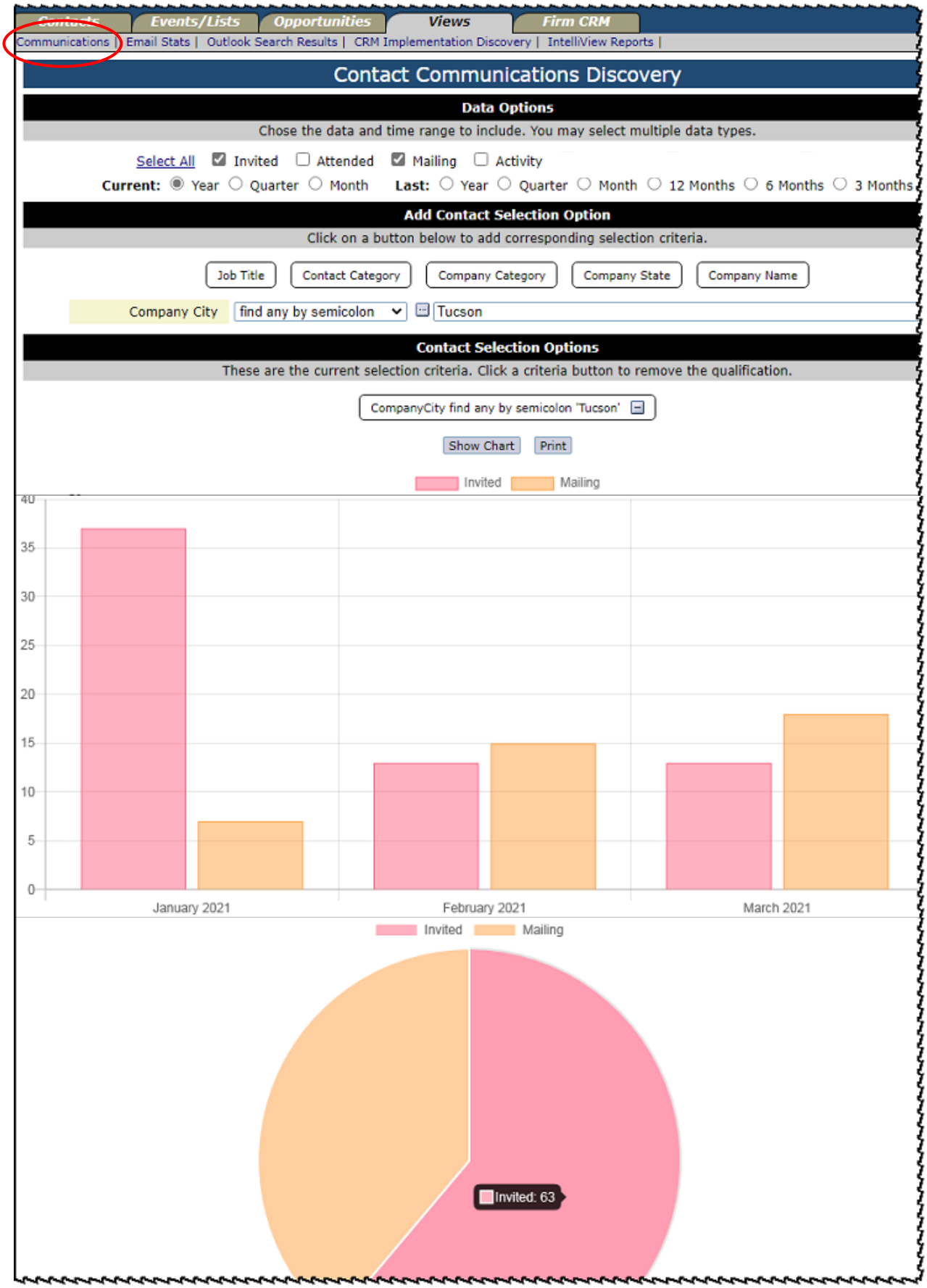
Communications

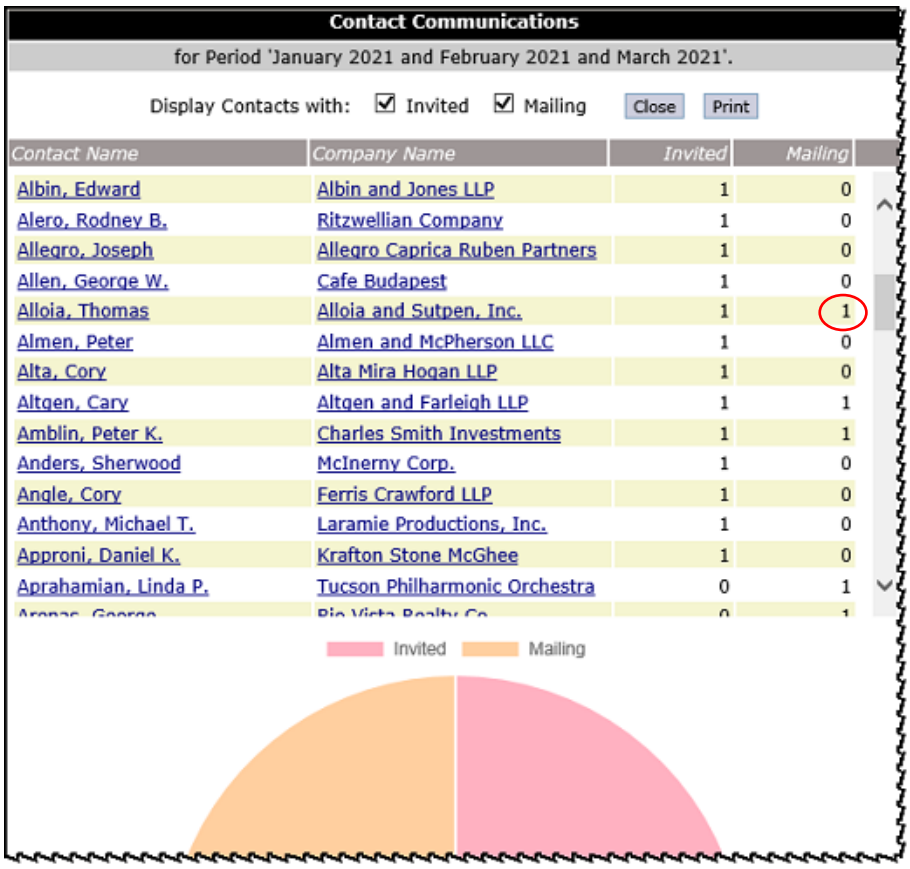
This new report, on the new Views menu, graphs the statistics on communications with contacts. The data is for all contacts, not just the user's linked ones. The selected data is presented in both bar and pie graphs. There are choices of data type and time period, with optional filters for contact selection. The data types are Invited (Event mail tasks), Mailings (Mailing List mail tasks), Attended (Response code), and Activities (business development log entries). The time period can be in the current or last year. Selection options are Job Title, Contact or Company Category, Company State or City, and Company Name.

The example on page 8 has Invited and Mailings for the Current Year (Jan, Feb, Mar) with selection by Company City.

Hover the pointer over a color bar, or pie section, to see a "tip" of the total number for that data type/month, or entire selected time period. Click a bar, or pie section, to open the drilldown of contacts with their totals, as in the example on page 9 top. Further drilldown is available by clicking the number in the Invited, Mailing, or other column name.

The drilldown from a pie section shows all included time period totals by contact; further drilldown by contact is available, as in the sample on page 9 bottom.

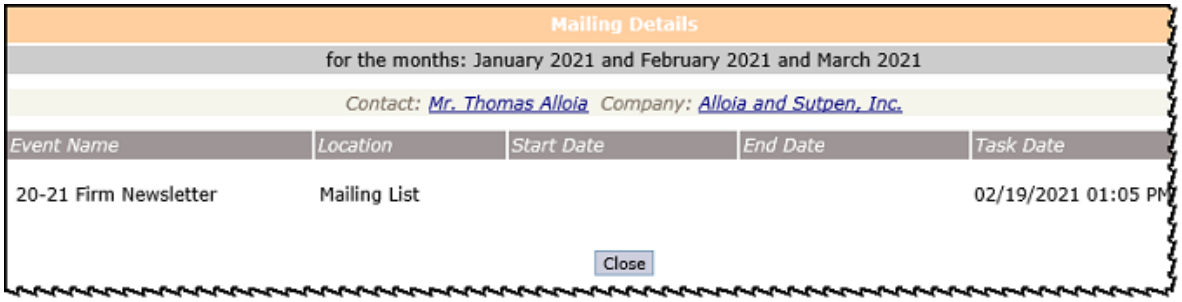

Events/Lists
Opportunities
Views
Firm CRM
Communications | Email Stats | Outlook Search Results | CRM Implementation Discovery | IntelliView Reports |
Contact Communications Discovery
Data Options
Chose the data and time range to include. You may select multiple data types.
Select All Invited Attended Mailing Activity
Current: Year Quarter Month Last: Year Quarter Month 12 Months 6 Months 3 Months
Add Contact Selection Option
Click on a button below to add corresponding selection criteria.
Job Title
Contact Category
Company Category
Company State
Company Name
Company City
find any by semicolon
Tucson
Contact Selection Options
These are the current selection criteria. Click a criteria button to remove the qualification.
CompanyCity find any by semicolon 'Tucson'
Show Chart
Print
Invited
Mailing
40
35
30
25
20
15
10
5
0
January 2021
February 2021
March 2021
Invited
Mailing
Invited: 63



Click a number to open mail task details for this contact, as shown below.

The full pie graph is shown, if scrolled down.

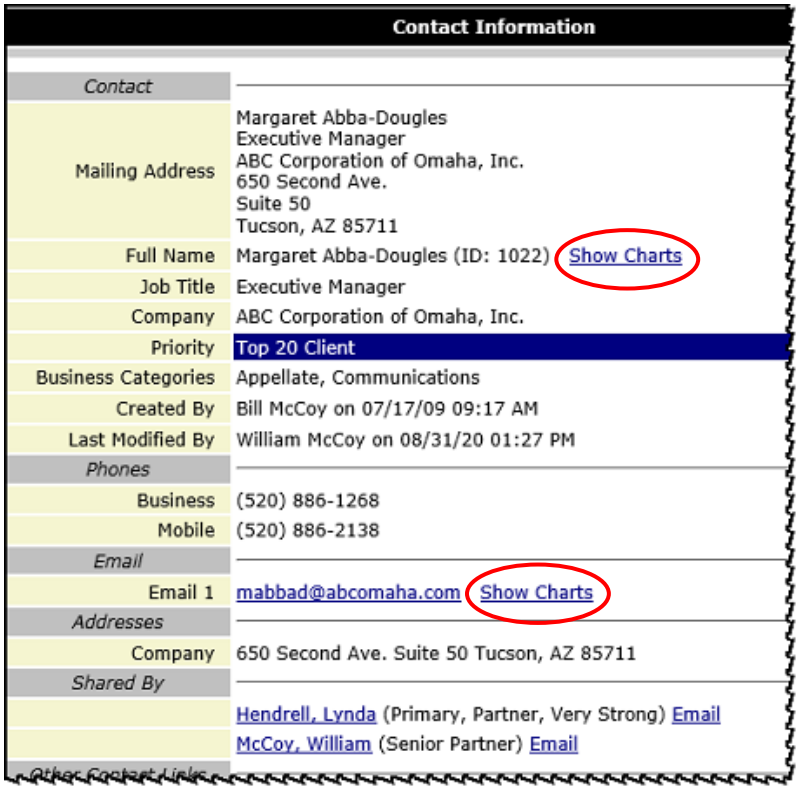
Drilldown for contact:



Show Charts links in Contact and Company Information windows

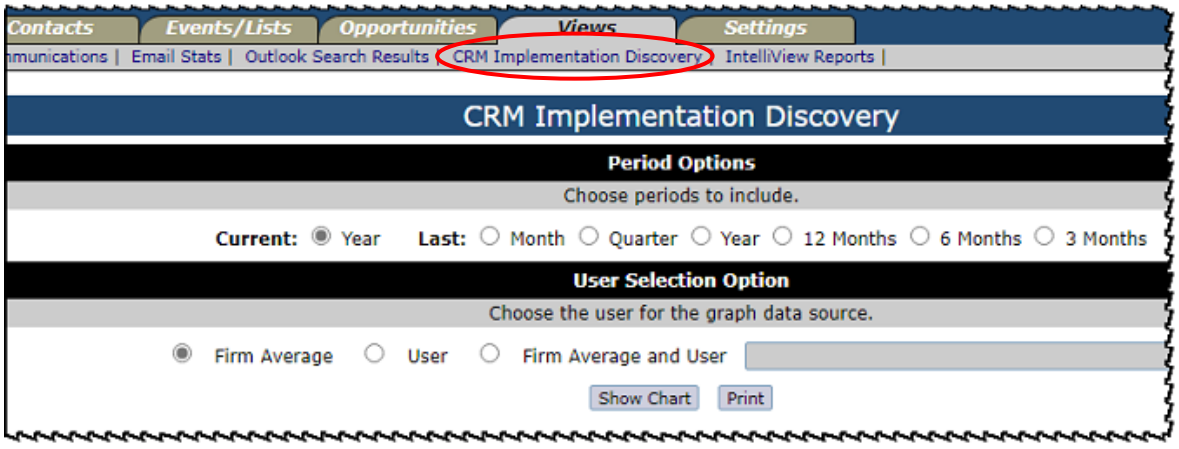
The new “Show Charts” links in the Contact Detail and Company Detail windows open the Communications feature for that contact or company’s linked contacts.

Sample screen on page 10:

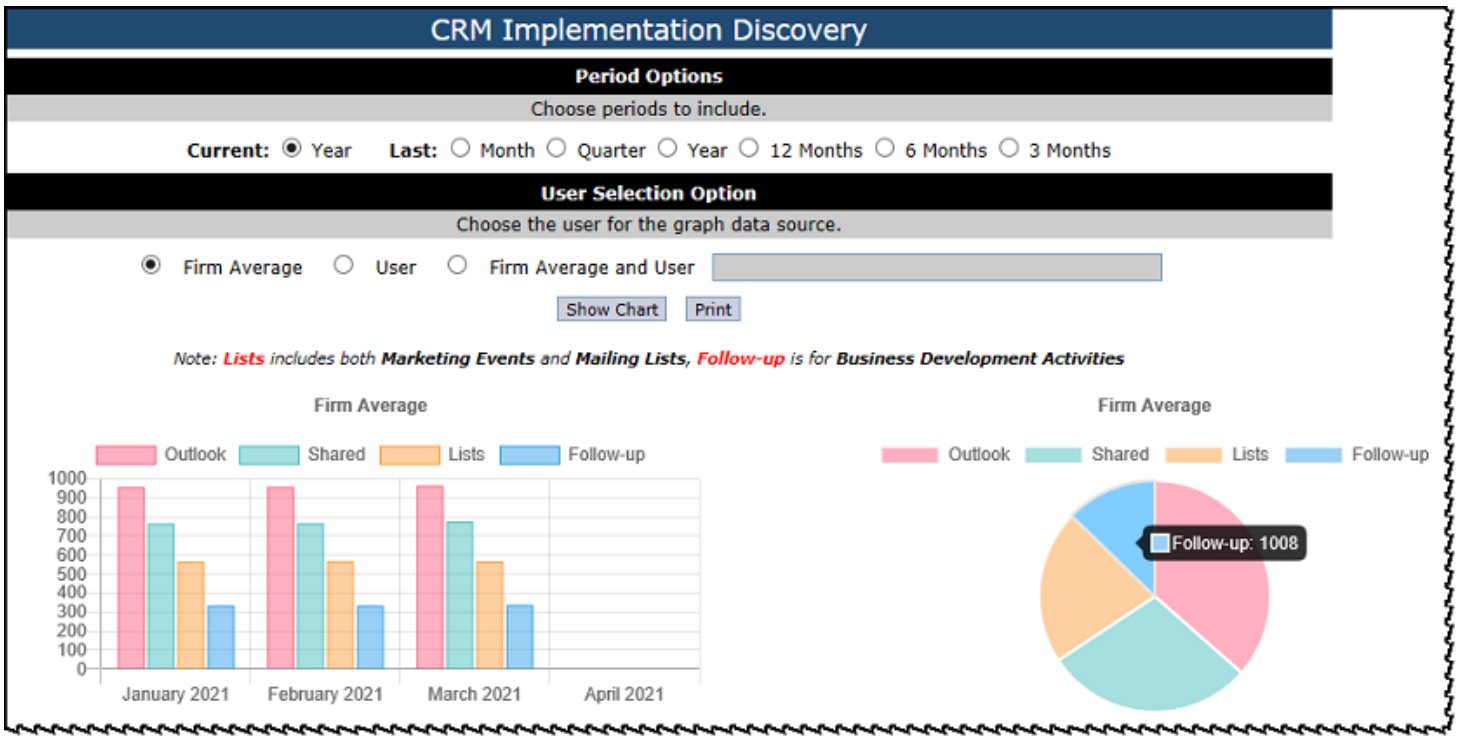


CRM Implementation Discovery

This new selection, on the new Views menu, presents bar and pie graphs for totals of Outlook contacts, Shared contacts, Lists (Events and Mailing Lists), and Follow Up (Activities). Selections are by time period, and by Firm Average, User, or both.

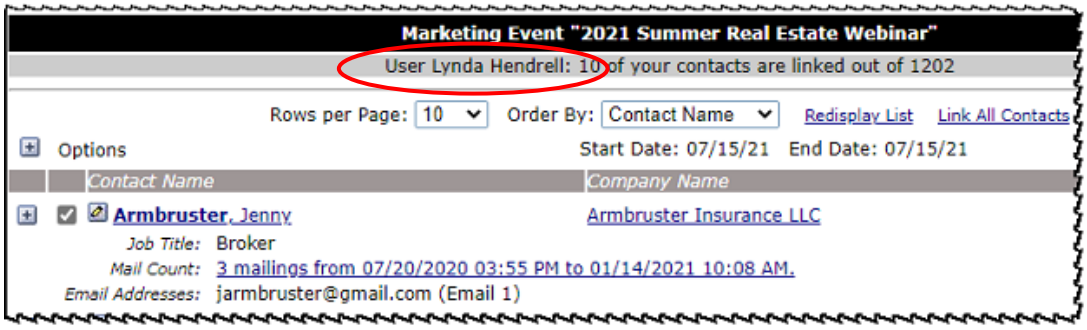


In the Show Chart display, hover the pointer over a color bar, or section, to see the total for that data type and time period, as shown on page 11:



Attorney name in heading of Marketing Event and Mailing List pages

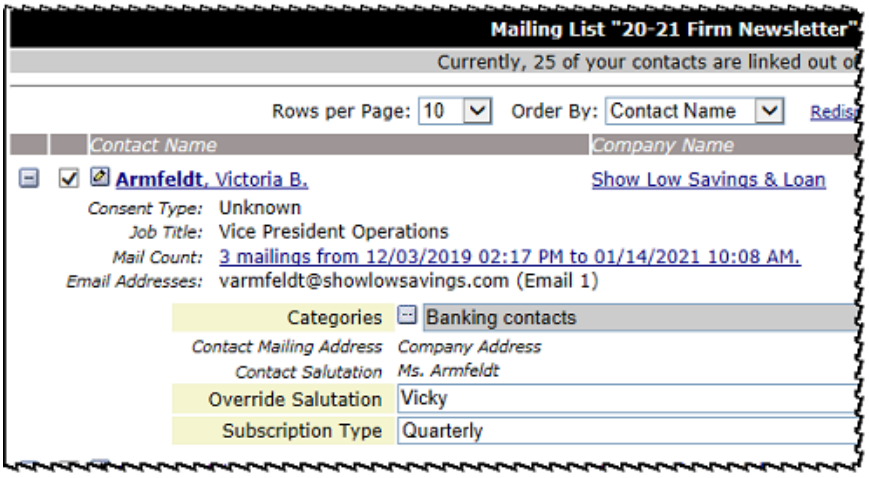
Needed because when opened from a notification email about an Event or Mailing List, the ContactLink main title with attorney name is not shown.



Link details in Marketing Events and Mailing Lists

Same as in Outlook. Each firm can decide which link detail fields to show; there are default settings with event level overrides. The custom link fields to show are only selected by individual Event or Mailing List, so users never need to see all those custom fields all the time.

Mailing List, showing Categories and Override Salutation, and one custom field:



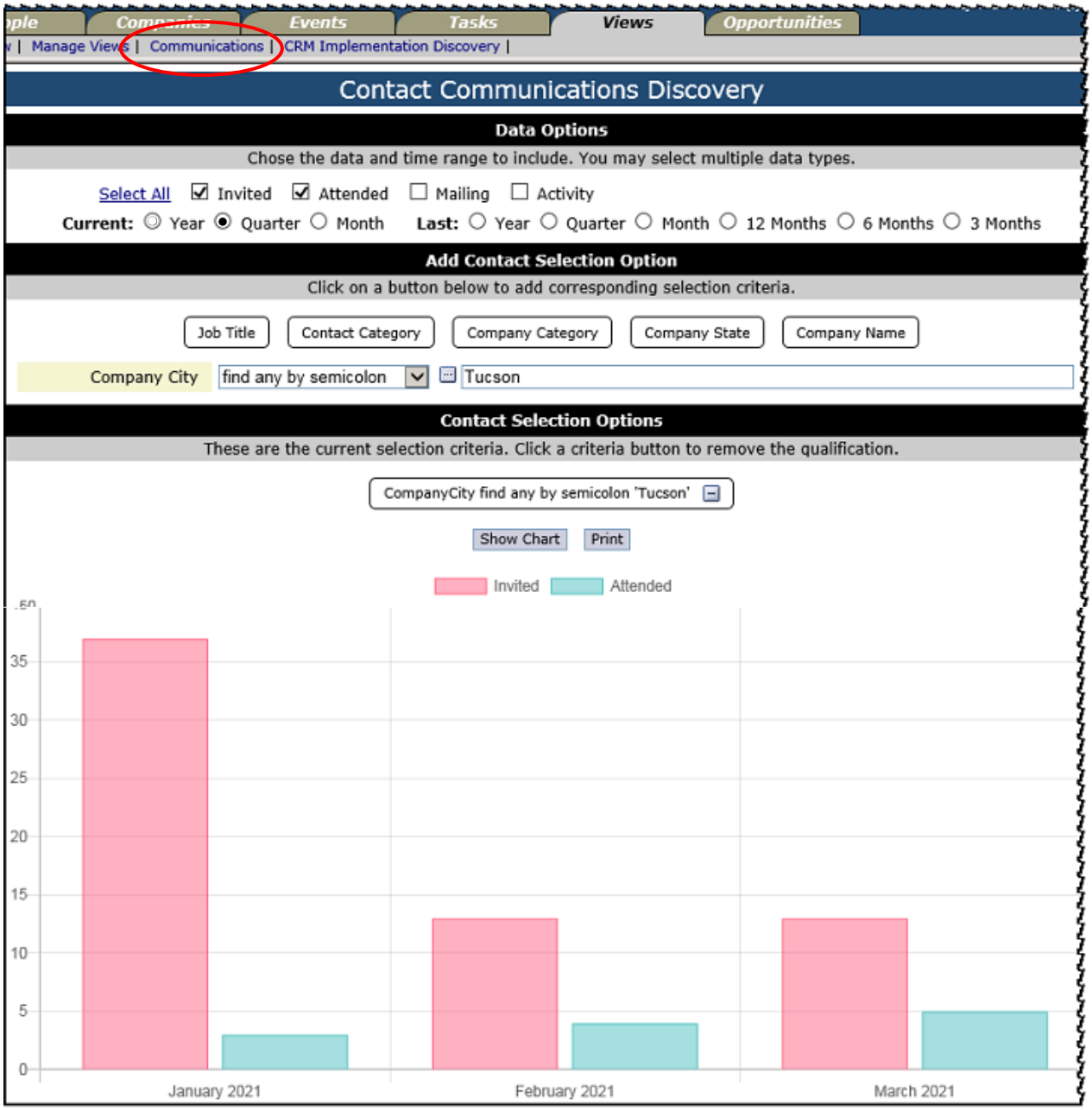
Enhancements in the web interface: Descriptions and Sample Screens

Communications

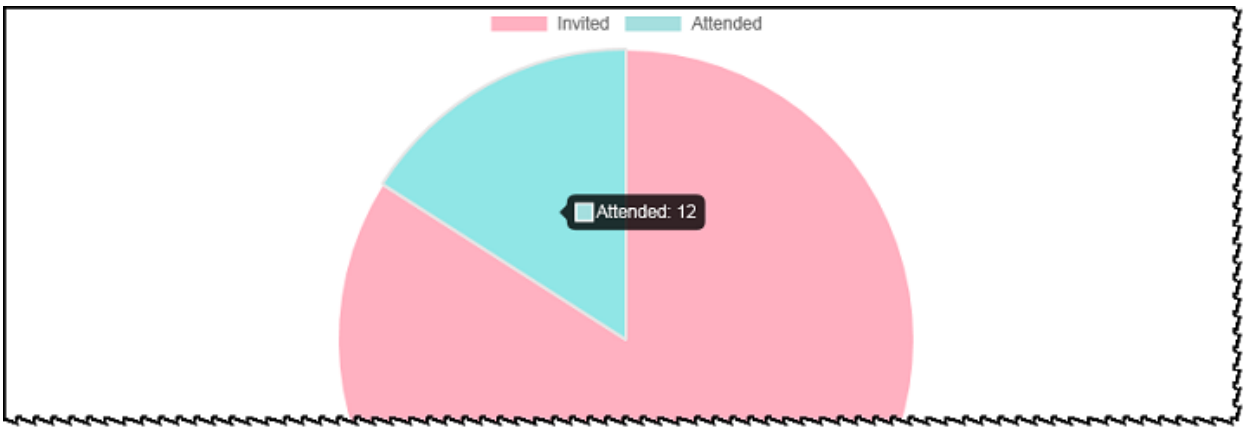
Located on the Views menu, this report graphs the statistics on communications with contacts. The selected data is presented in both bar and pie graphs. There are choices of data type and time period, with optional filters for contact selection. The data types are Invited (Event mail tasks), Mailings (Mailing List mail tasks), Attended (Response code), and Activities (business development log entries). The time period can be in the current or last year. Selection options are Job Title, Contact or Company Category, Company State or City, and Company Name.

All features are the same as in the ContactLink version. Hover the pointer over a color bar, or pie section, to see a “tip” with the total (shown in sample on page 13 top). Click the bar or pie section to open the drilldown window.

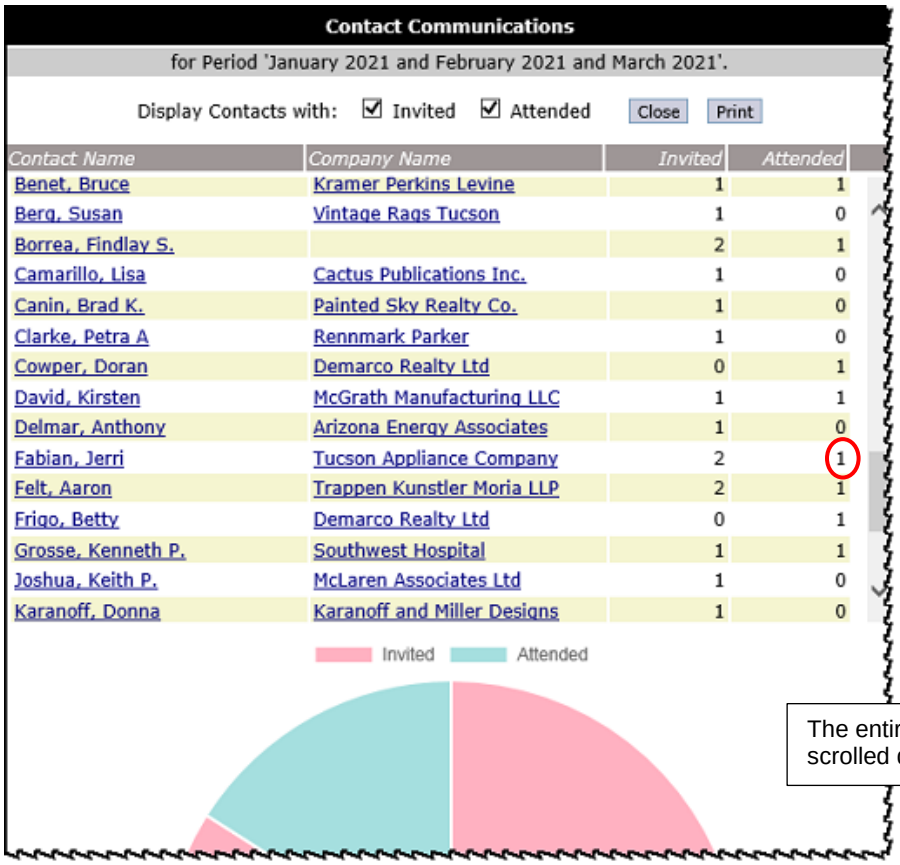
The sample starting below shows Invited and Attended for the Current Quarter and Company City “Tucson”. The samples on page 13 are the drilldowns from the pie graph.



Continued on page 13, pie graph section



First drilldown, from pie section:



Contact Communications

for Period 'January 2021 and February 2021 and March 2021'.

Display Contacts with: ☑ Invited ☑ Attended Close Print

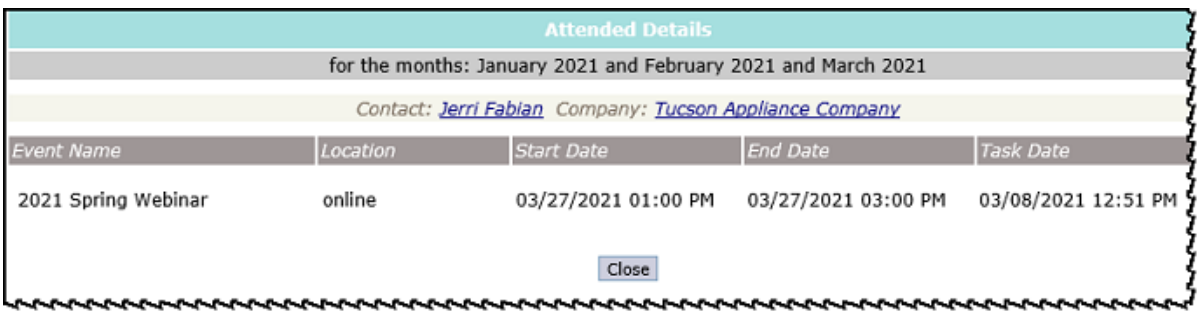
Contact Name	Company Name	Invited	Attended
Benet, Bruce	Kramer Perkins Levine	1	1
Berg, Susan	Vintage Rags Tucson	1	0
Borrea, Findlay S.		2	1
Camarillo, Lisa	Cactus Publications Inc.	1	0
Canin, Brad K.	Painted Sky Realty Co.	1	0
Clarke, Petra A	Rennmark Parker	1	0
Cowper, Doran	Demarco Realty Ltd	0	1
David, Kirsten	McGrath Manufacturing LLC	1	1
Delmar, Anthony	Arizona Energy Associates	1	0
Fabian, Jerri	Tucson Appliance Company	2	1
Felt, Aaron	Trappen Kunstler Moria LLP	2	1
Frigo, Betty	Demarco Realty Ltd	0	1
Grosse, Kenneth P.	Southwest Hospital	1	1
Joshua, Keith P.	McLaren Associates Ltd	1	0
Karanoff, Donna	Karanoff and Miller Designs	1	0

Invited Attended

Click a number to open mail task details for this contact, as shown below.

The entire pie graph is shown, if scrolled down.

Contact drilldown:



Attended Details

for the months: January 2021 and February 2021 and March 2021

Contact: Jerri Fabian Company: Tucson Appliance Company

Event Name	Location	Start Date	End Date	Task Date
2021 Spring Webinar	online	03/27/2021 01:00 PM	03/27/2021 03:00 PM	03/08/2021 12:51 PM

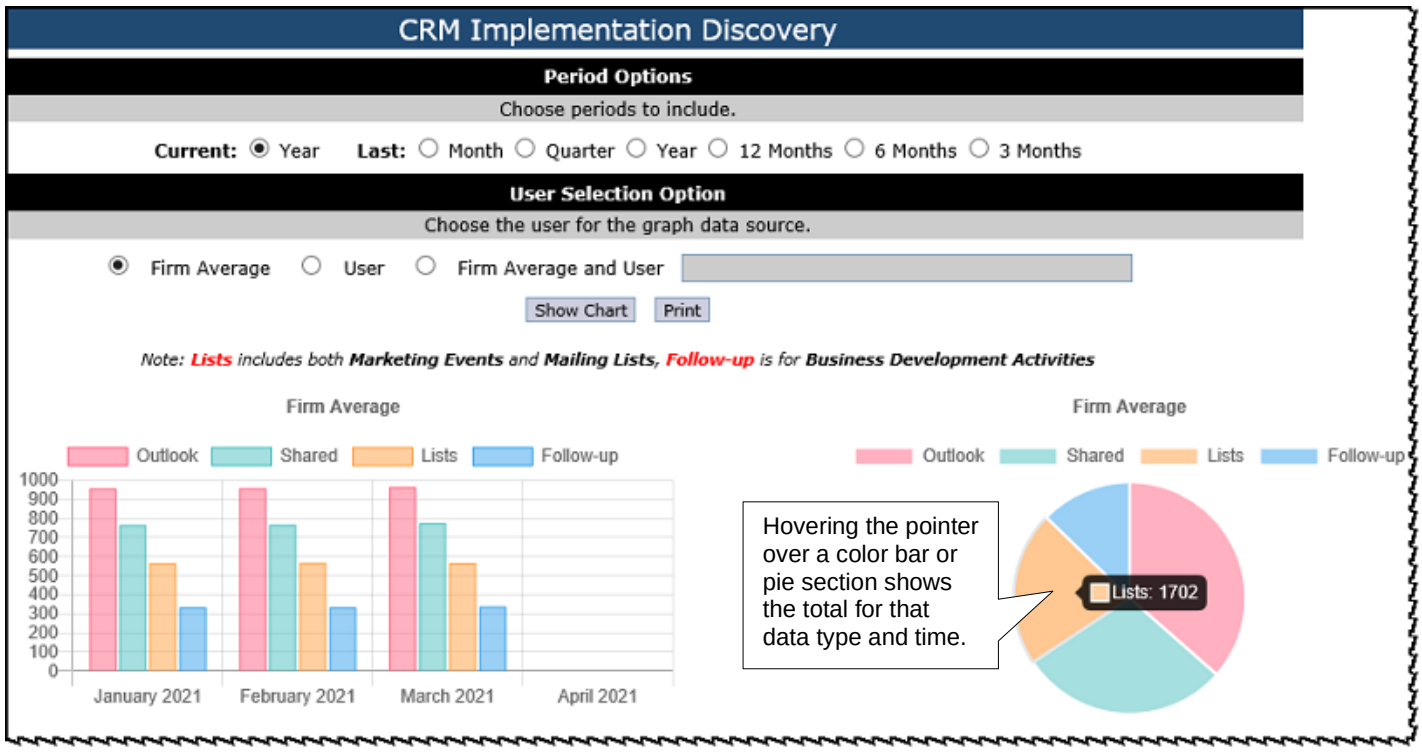
Close

Opportunities

Please refer to Appendix 1 for more information on this new menu and its selections.

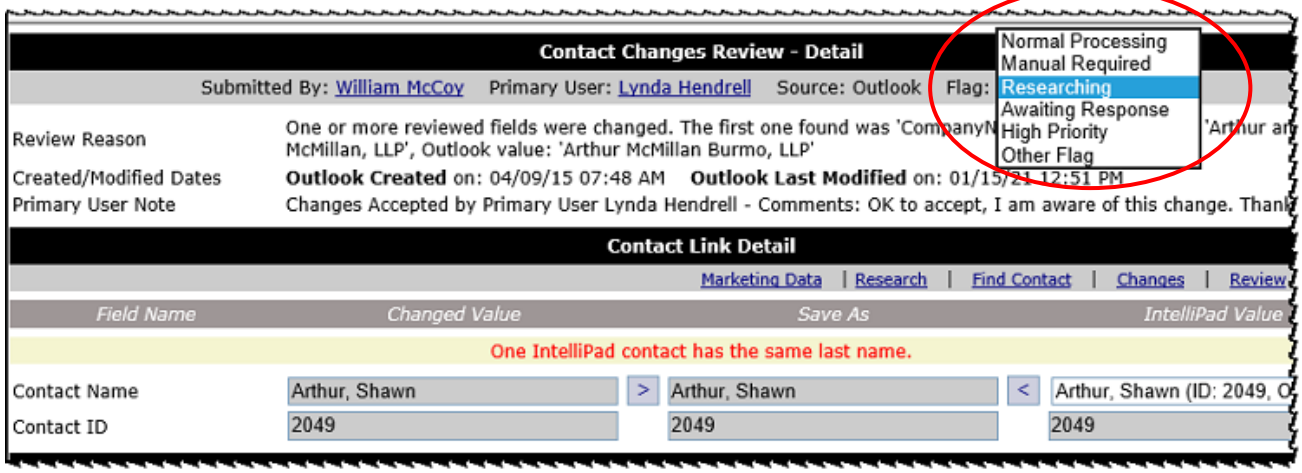
CRM Implementation Discovery

This new report, located on the Views menu, presents bar and pie graphs for totals of Outlook contacts, Shared contacts, Lists (Events and Mailing Lists), and Follow Up (Activities). Selections are by time period, and by Firm Average, User, or both. The goal is to show trends by comparing attorneys to firm averages within a time period. There are no drilldowns.



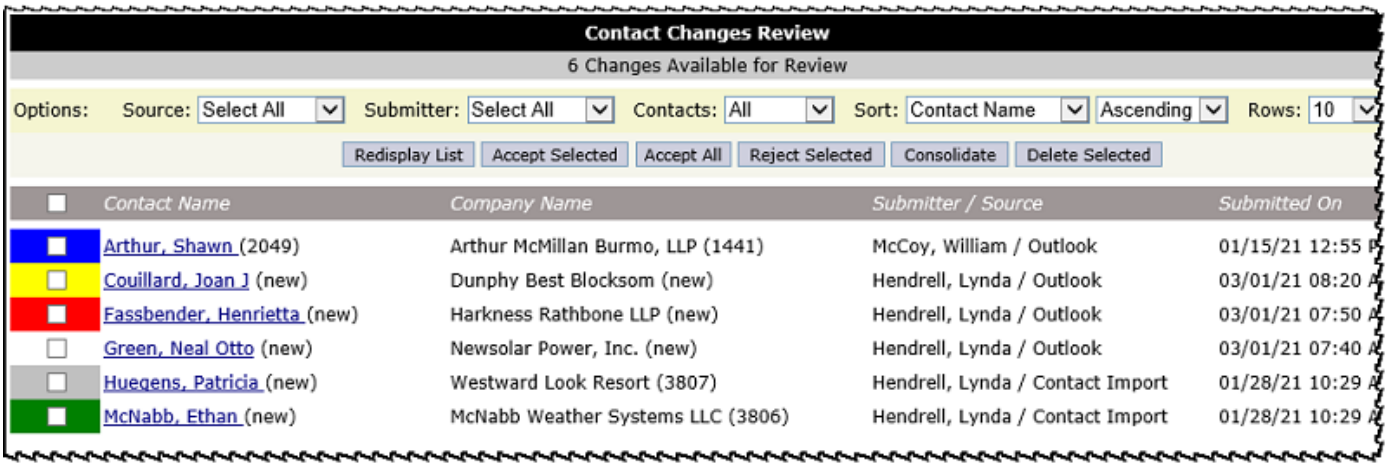
Contact Changes Review: Review record flags with color-coding

In the review detail page, users can select a flag for a new or change review record: Manual Required (gray), Researching (blue), Awaiting Response (green), High Priority (red), and Other Flag (yellow).



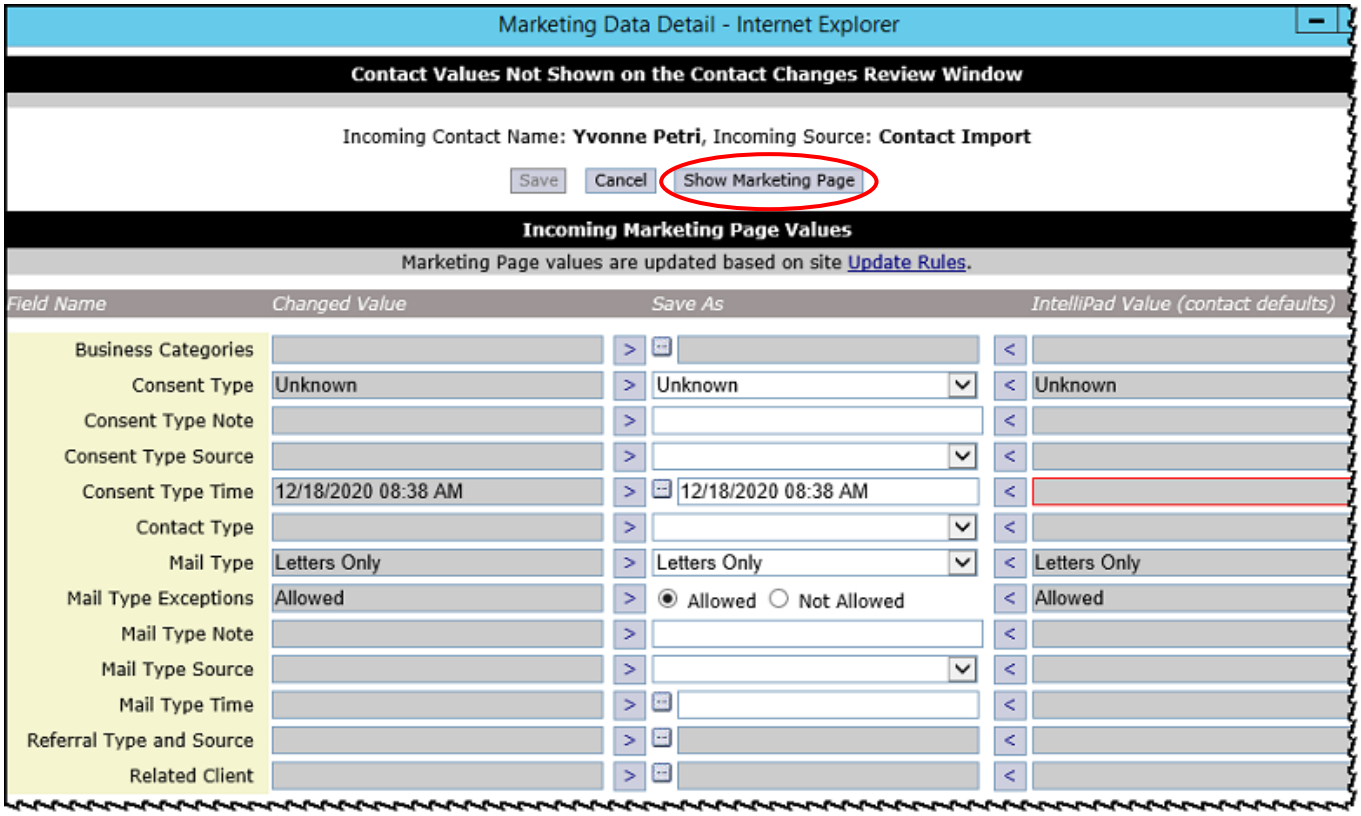
Flagged review records cannot be checked for Accept Selected processing, and are not included in Accept All processing. (Note that imported records with address parsing errors are automatically given the Manual Required flag.)

Sample list page with flags on page 15:



Contact Changes Review: Link contacts to Events, Mailing Lists

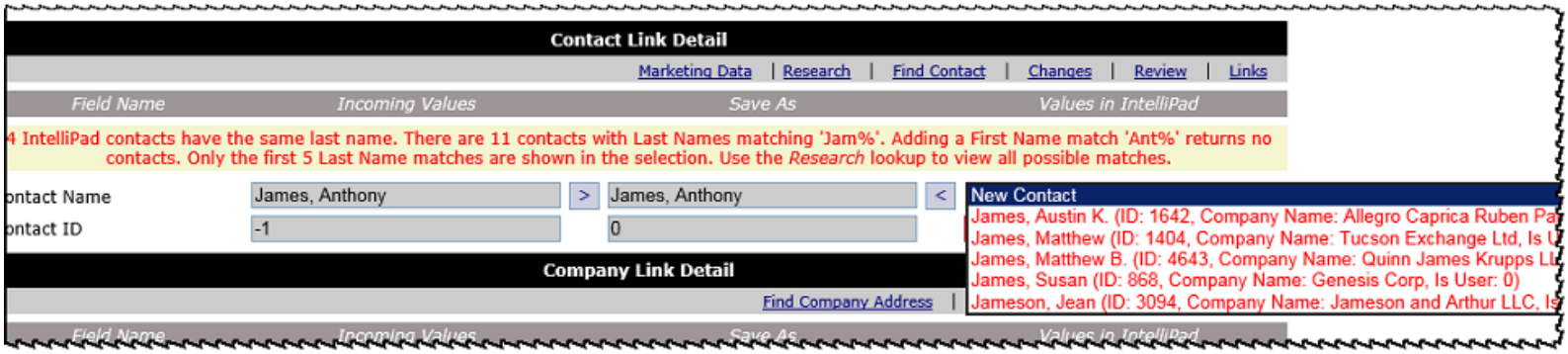
A new Site Setting activates this feature. The Marketing Data window (formerly Non-Reviewed), opened from the Review Detail page, includes the button Show Marketing Page, as in the example below (for a new contact):



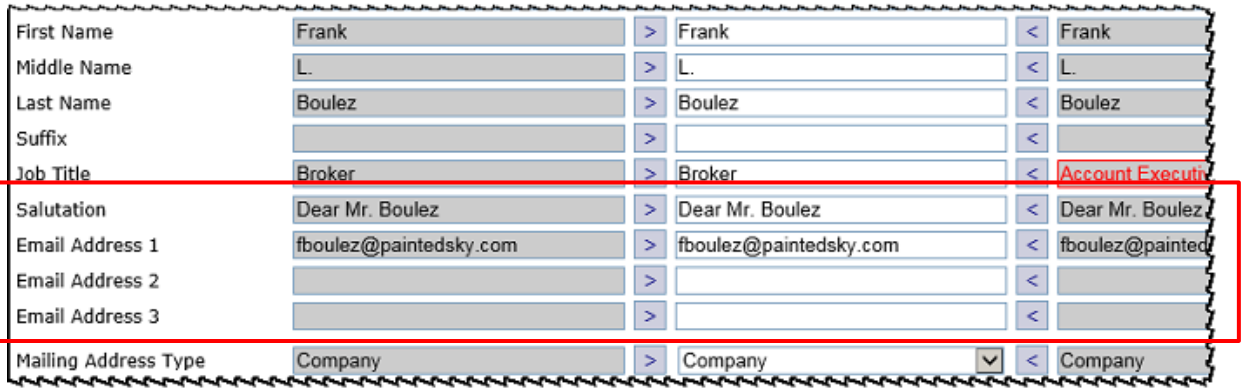
The entire Outlook Marketing page opens; the user can open the Marketing Event and/or Mailing List sections, link the contact as needed, then Save Changes.

Contact Changes Review: New message about matches, limited display in New Contact dropdown

The red text message above explains the matches, and a maximum of 5 are shown in the dropdown list.

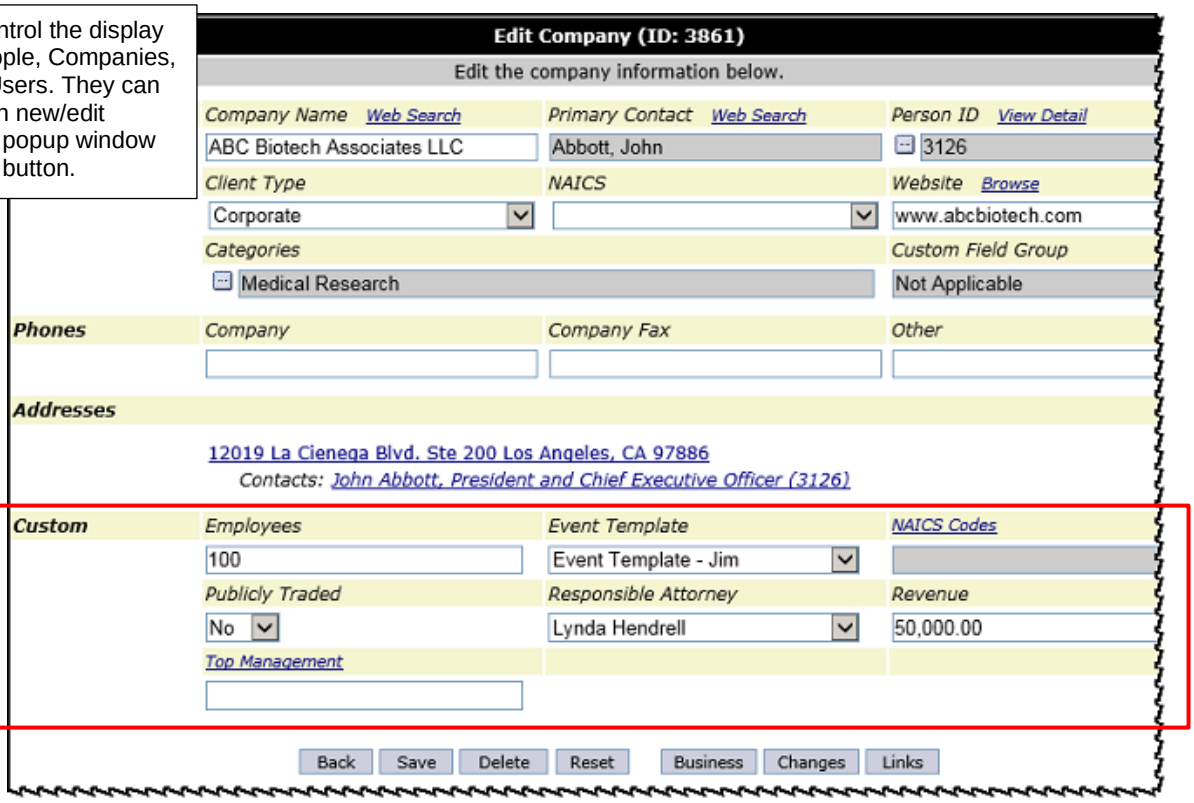


Contact Changes Review: Email Addresses moved up to Name section



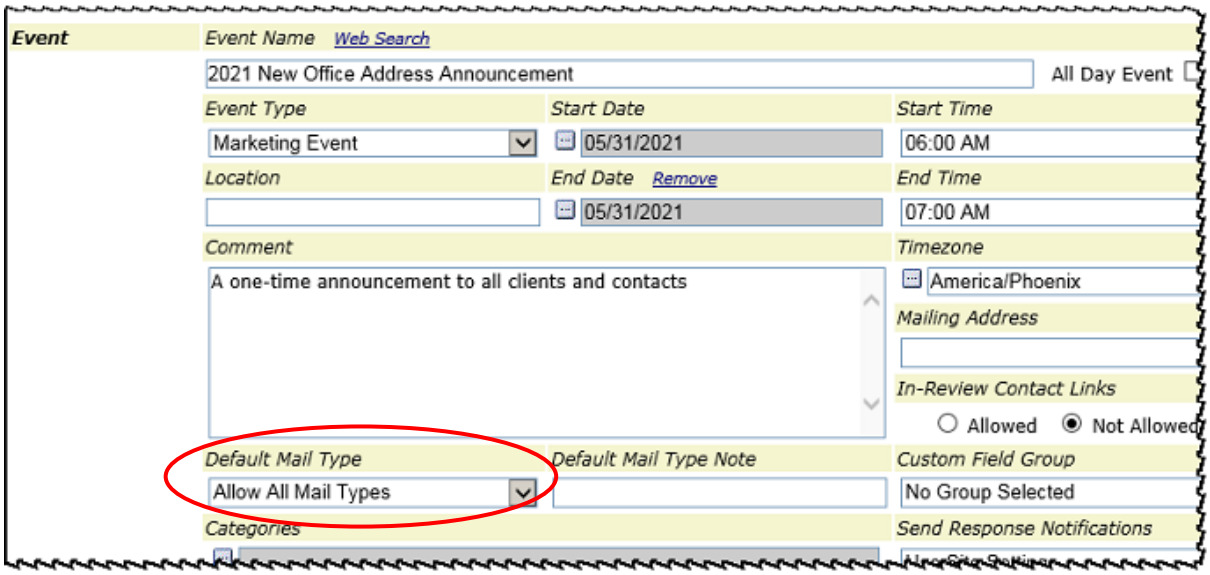
Custom field display

New Site Settings control the display of Custom fields: People, Companies, Events, Tasks, and Users. They can be shown on the main new/edit pages instead of in a popup window opened by a Custom button.



Allow All Mail Types for Event

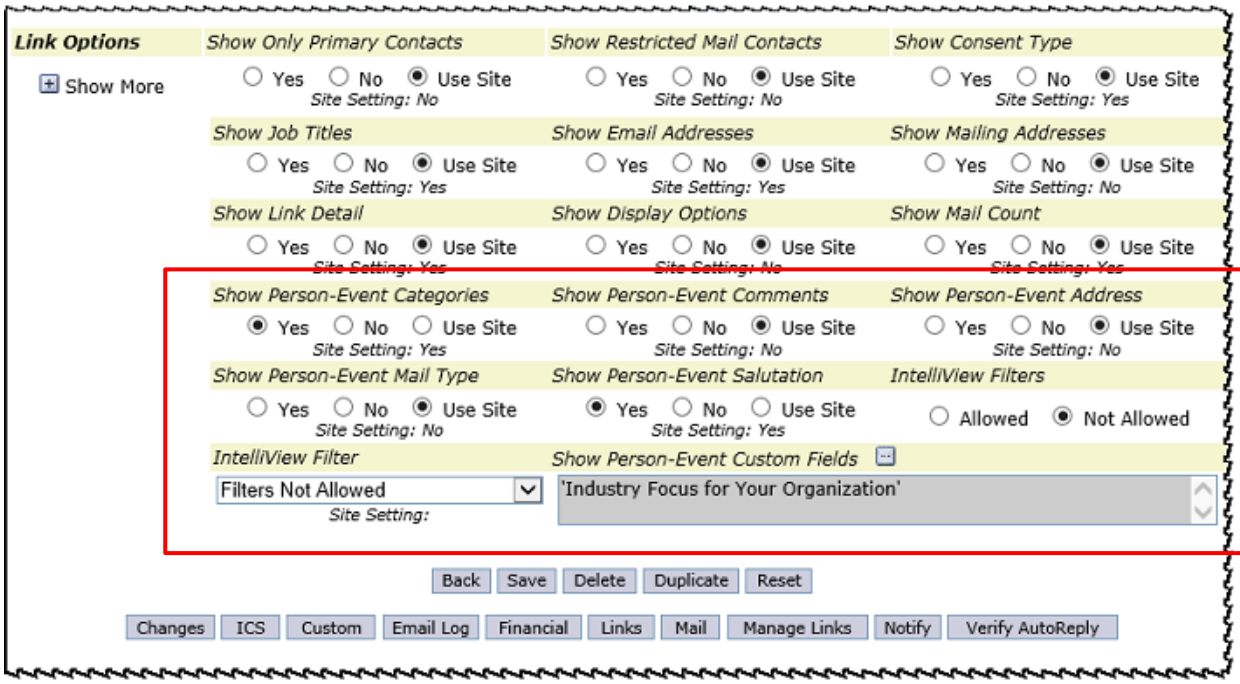
This selection for the Event's Default Mail Type means that all linked contacts, regardless of their personal Mail Types, will be included in all mail tasks created for the Event; link level override Mail Types are not needed. (Only contacts with "No Mail No Exceptions" are excluded, as they cannot be linked.)



Override settings for link detail fields, and custom fields, by Event and Mailing List

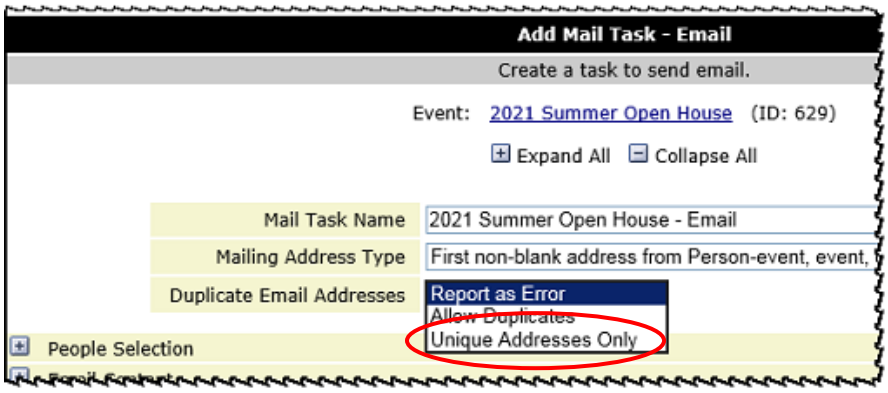
The link detail fields to show, for all Events and Mailing Lists in both Outlook and ContactLink, are now chosen in new Site Settings. For example: Only the Link Categories and Override Salutation. Overrides can be chosen for individual Events and Mailing Lists, if needed. Custom Person-Event fields to show are chosen ONLY for individual Events and Mailing Lists, so users no longer have to see all defined custom fields all the time.

The Edit Event page's Link Options section at bottom (formerly "ContactLink") has been extended to include the five "Show Person-Event" settings and the "Show Person-Event Custom" field selection, as in the example below.



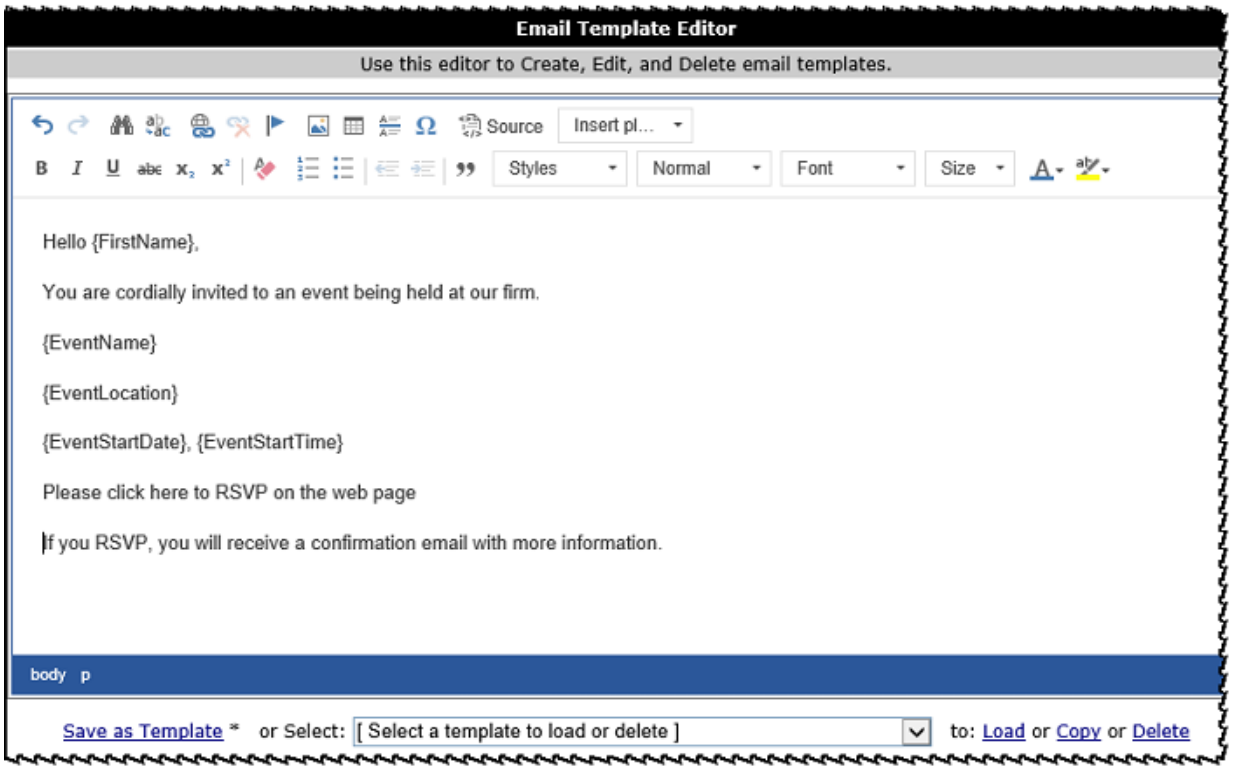
New option for Duplicate Email Addresses

For all types of email mail tasks, including Constant Contact, Emma, and ActOn: The Duplicate Email Addresses has a new option, Unique Addresses Only. With this option, the program will select only the lowest Person ID (i.e. oldest) contact when there are multiple contacts with the same email address—there will be no Exception for this.



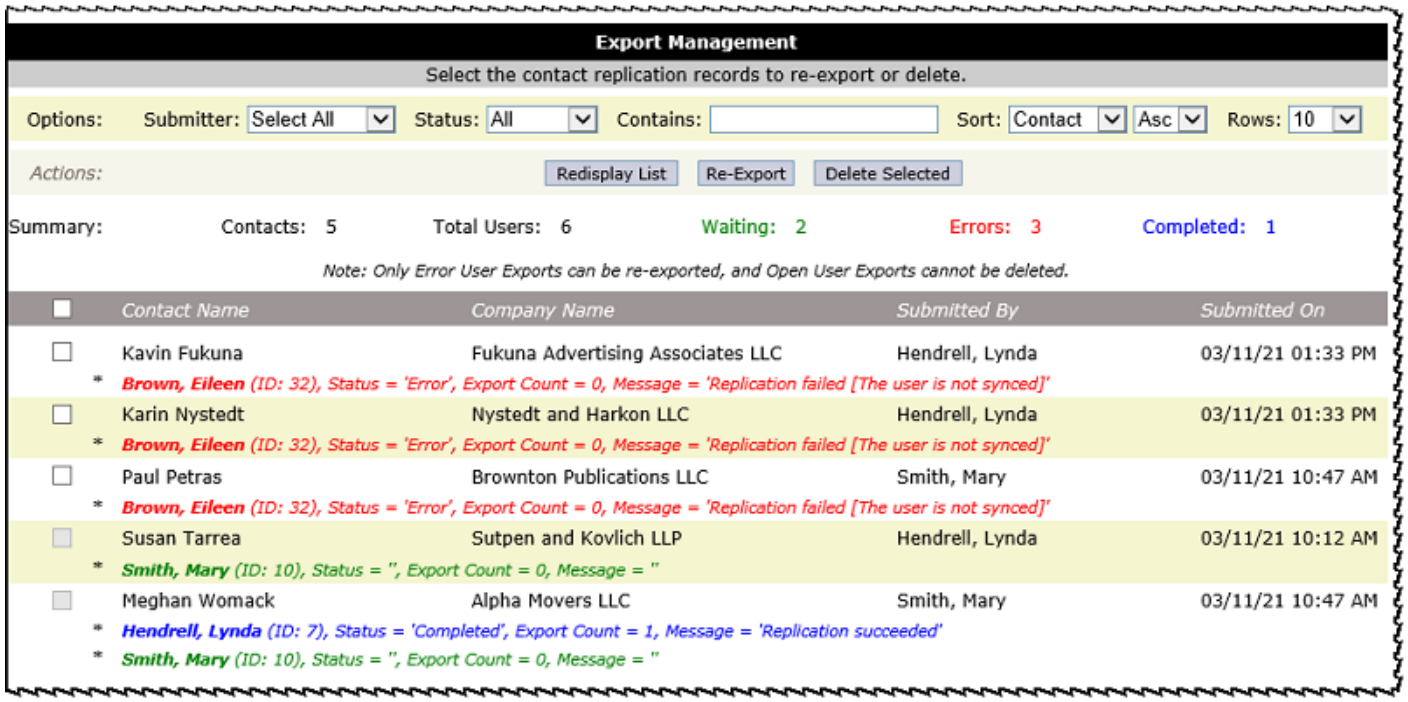
New content editor in email mail tasks and templates

The new editor is simpler, and provides all the same capabilities and functions as the former editor, including use of templates, placement of data fields, insertion of tables in the text, and inclusion of clickable links to RSVP and Subscription landing pages.



Export Management

The updated screen has Options of Submitter, Status, Contains, Sort, and Rows. Submitter choices will be all users who have review records currently awaiting export or with errors. Status choices are All, Error, Complete, Waiting; Contains are literal words in the program's message, such as "update". Sort choices are Contact and Company, with choice of Asc(ending) or Desc(ending). Rows determines the number displayed, if more than 10 exist. Export records with Completed and Error results can be selected and deleted.



Export Management

Select the contact replication records to re-export or delete.

Options: Submitter: Select All | Status: All | Contains: | Sort: Contact Asc | Rows: 10

Actions: Redisplay List | Re-Export | Delete Selected

Summary: Contacts: 5 Total Users: 6 Waiting: 2 Errors: 3 Completed: 1

Note: Only Error User Exports can be re-exported, and Open User Exports cannot be deleted.

	Contact Name	Company Name	Submitted By	Submitted On
☐	Kavin Fukuna	Fukuna Advertising Associates LLC	Hendrell, Lynda	03/11/21 01:33 PM
*	***Brown, Eileen*** *(ID: 32), Status = 'Error', Export Count = 0, Message = 'Replication failed [The user is not synced]'*			
☐	Karin Nystedt	Nystedt and Harkon LLC	Hendrell, Lynda	03/11/21 01:33 PM
*	***Brown, Eileen*** *(ID: 32), Status = 'Error', Export Count = 0, Message = 'Replication failed [The user is not synced]'*			
☐	Paul Petras	Brownton Publications LLC	Smith, Mary	03/11/21 10:47 AM
*	***Brown, Eileen*** *(ID: 32), Status = 'Error', Export Count = 0, Message = 'Replication failed [The user is not synced]'*			
☐	Susan Tarrea	Sutpen and Kovlich LLP	Hendrell, Lynda	03/11/21 10:12 AM
*	***Smith, Mary*** *(ID: 10), Status = '', Export Count = 0, Message = ''*			
☐	Meghan Womack	Alpha Movers LLC	Smith, Mary	03/11/21 10:47 AM
*	***Hendrell, Lynda*** *(ID: 7), Status = 'Completed', Export Count = 1, Message = 'Replication succeeded'*			
*	***Smith, Mary*** *(ID: 10), Status = '', Export Count = 0, Message = ''*			

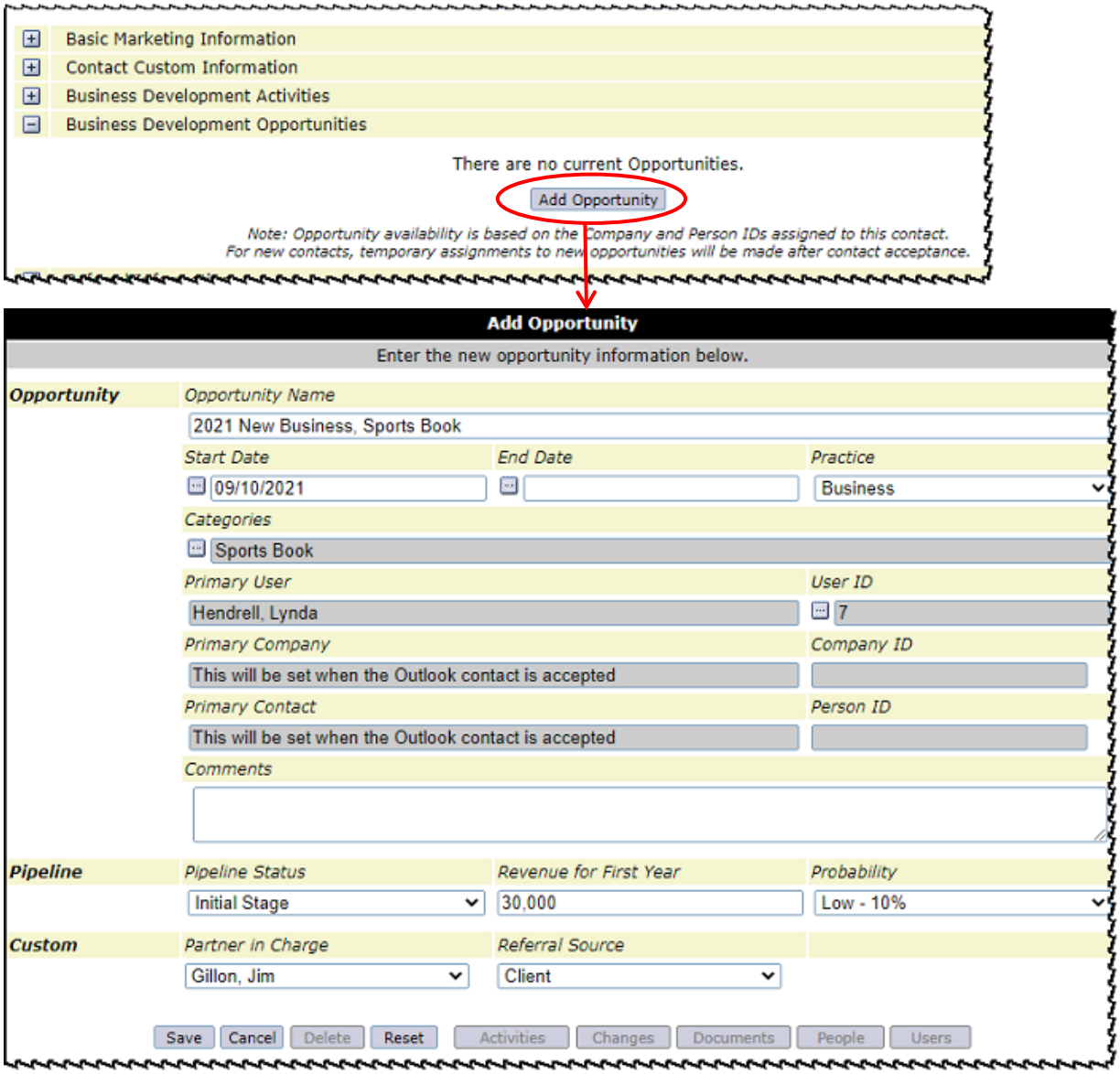
Appendix 1: Business Development Opportunities

This new functionality helps firms identify and pursue potential new business using traditional sales pipeline features such as practice group, pipeline status, probability, and tracking of related activities. An Opportunity represents the effort for a specific business the firm is hoping to win, whether a new client or additional services for an existing client. Features are located in Outlook, ContactLink, and the web interface.

Outlook

Business Development Opportunities section

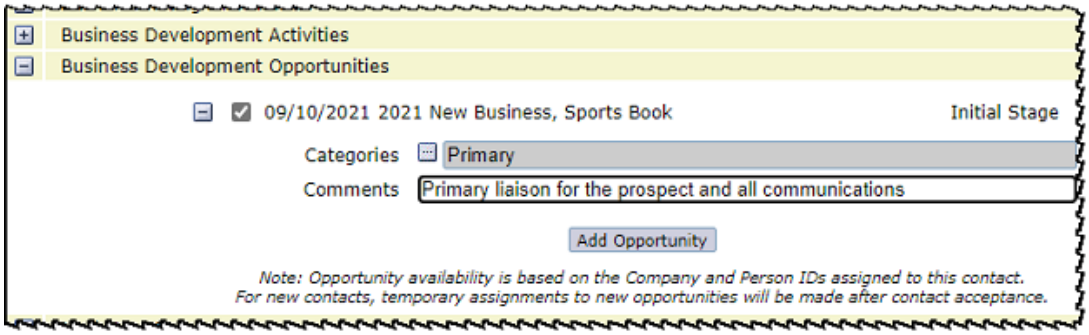
This is a new section on the Marketing page. When adding a new contact, or editing a contact, users can add a new Opportunity for them. When the new contact is accepted in IntelliPad, the Opportunity will be created with the new contact as Primary and their company as Primary Company.



The Practice Group, Categories, Pipeline Status, and Probability codes are created by each firm. The Practice Group the user is Leader of is defaulted in. There are default Pipeline Status and Probability Codes for all new Opps. Each Pipeline Status can have an associated Probability. The Pipeline Status will be changed as the Opp. goes through the stages such as RFP, Proposal Sent, Negotiation, Won; the Probability changes automatically based on the new Pipeline. Each firm can create Custom fields, as shown in the sample.

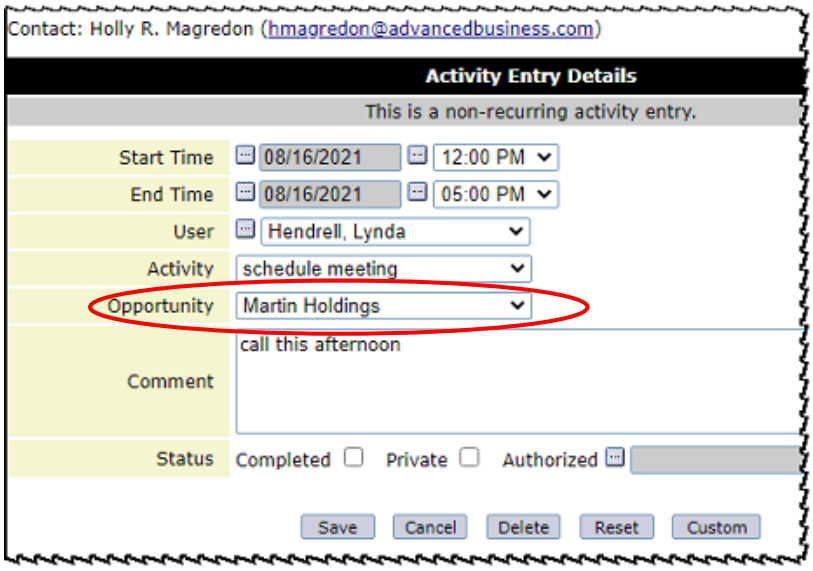
After the Opportunity has been saved, the section looks like the sample on page 21; users can add Opp. Link Categories and a Comments text at that time, i.e. prior to Save & Close the contact. After the contact has been

accepted in the IntelliPad database, the Opp. Name is clickable to be edited here to link other People and Users, upload and link Documents, and add Activities. Adding these links is described in the ContactLink section, starting below. But all the same features are available here in Outlook. (Opp. Name not yet clickable in example below.)



Business Development Activities

If a contact is linked to an Opportunity: Activities entered can have the Opportunity selected; these Activities will also be shown when you edit the Opp in the Business Development Opp. section and select Activities. They will also appear in ContactLink under the Opportunity (see the List page below).



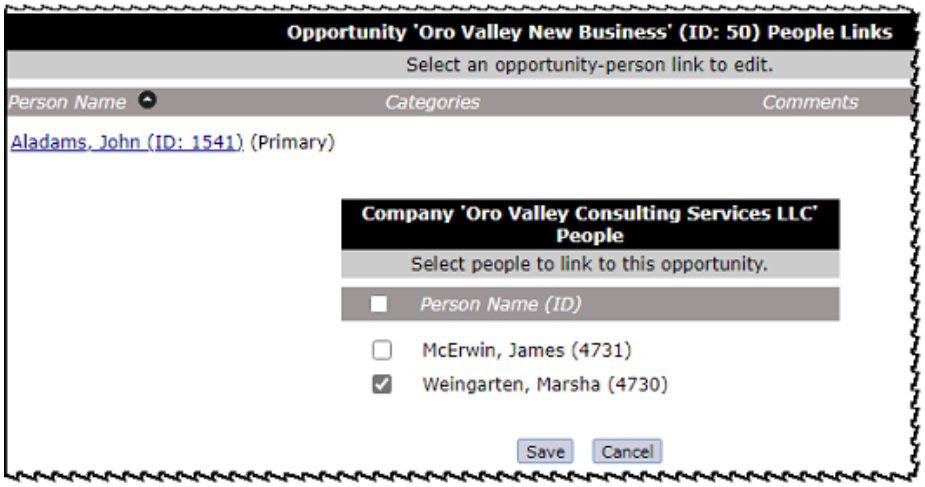
ContactLink

The Opportunities menu opens with the List page, showing the user's linked ones if any. The user can edit one from the list, or add a new one. The numbers in the Activities column are links to open the list of Activities for the Opp.

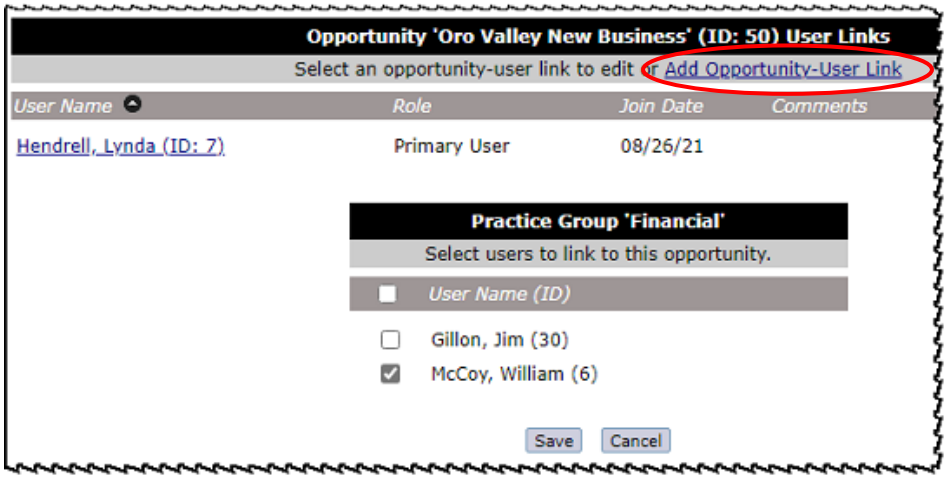
Start	Opportunity Name	Type	Practice	Pipeline	Probability	Activities
07/30/21	ABC Holdings litigation cases (ID: 4)	Prospect	Retail	Proposal Sent	Good - 50%	1
08/02/21	HomeTrust Bank (ID: 6)	Prospect	Financial	RFP	High - 75%	6
08/09/21	Martin Holdings (ID: 12)	Referral	Financial	Decision Pending	Possible - 25%	3
08/16/21	Brightman New Business 2021 (ID: 20)	Client	Financial	Initial Stage	Good - 50%	
08/17/21	Encanto Plaza New Client (ID: 33)	Client	Retail	Initial Stage	Low - 10%	
08/26/21	Oro Valley New Business (ID: 50)	Client	Financial	Initial Stage	Good - 50%	1
09/06/21	Roncalle Company (ID: 52)	Prospect	Construction	Initial Stage	High - 75%	

Add Opportunity

The procedure is the same as in Outlook, except that a Primary Company and Primary Contact must be selected. After saving: People link window below. Only persons linked to the Primary Company are eligible.

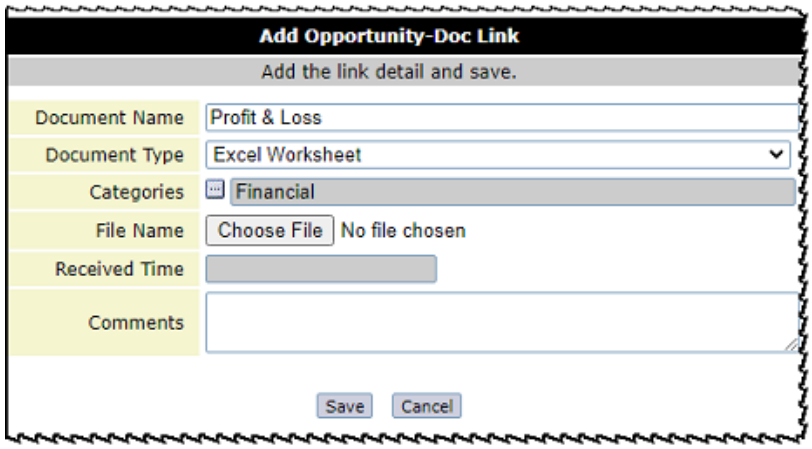


Users link window below; users assigned to the selected Practice Group for the Opp. are listed. However, any user can be linked using the Add Opportunity-User Link.

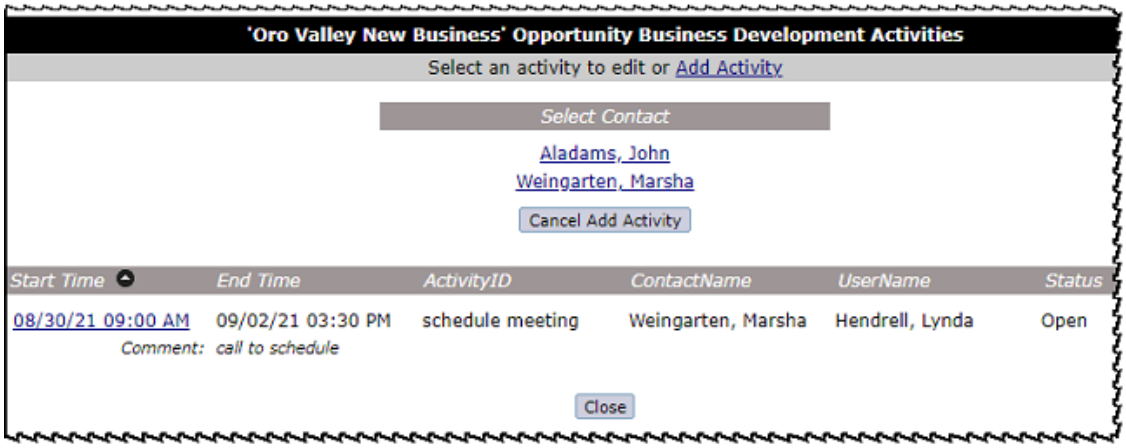


Document upload window at right. Clicking the "Choose File" box opens a standard Windows open file dialog. After upload and save, the program records the Received Time.

(NOTE: Internet Explorer has a Browse button for File.)



Activity entry, person selection below. After selection, the standard Add Activity window opens.

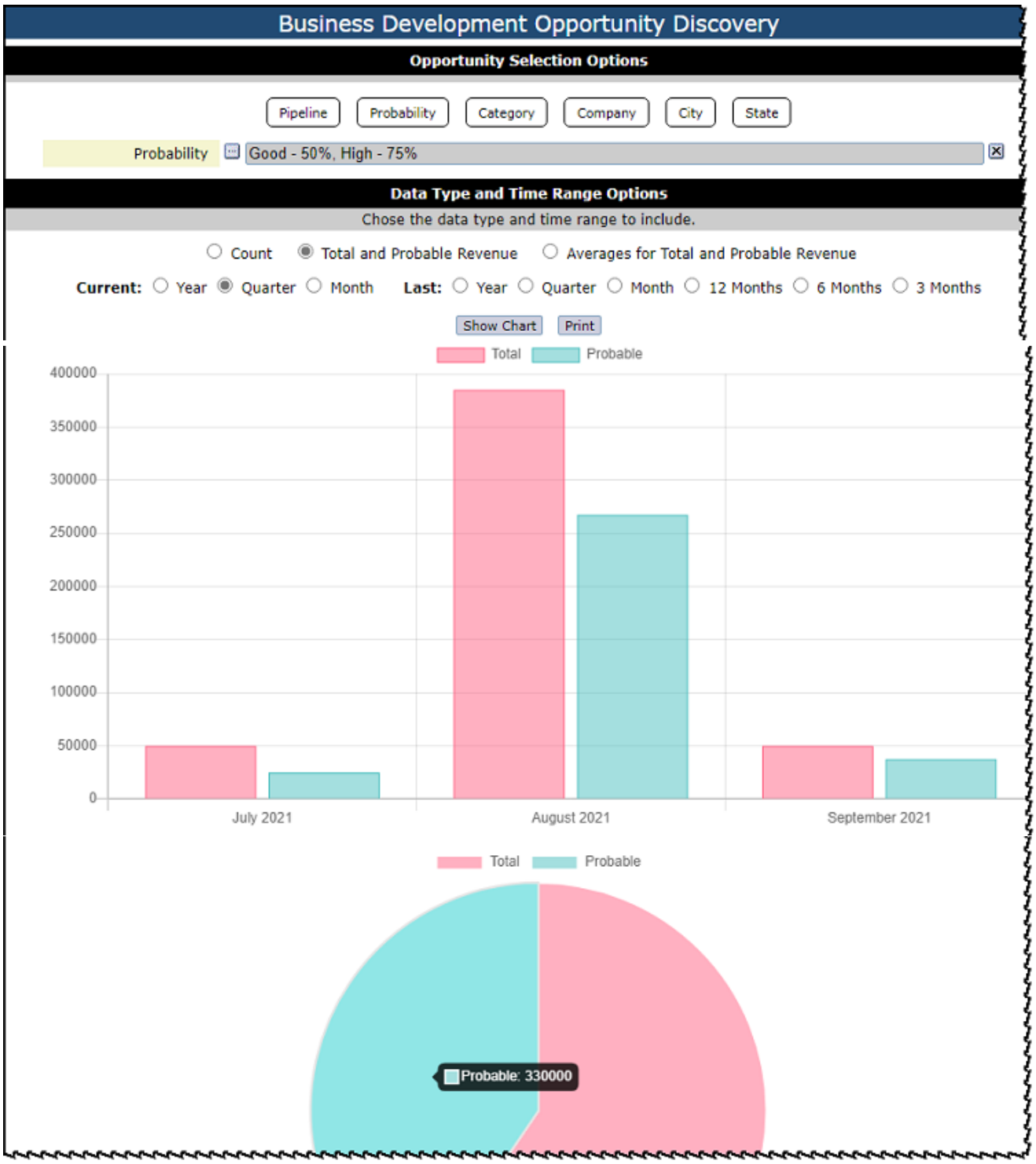


My Opportunity Discovery

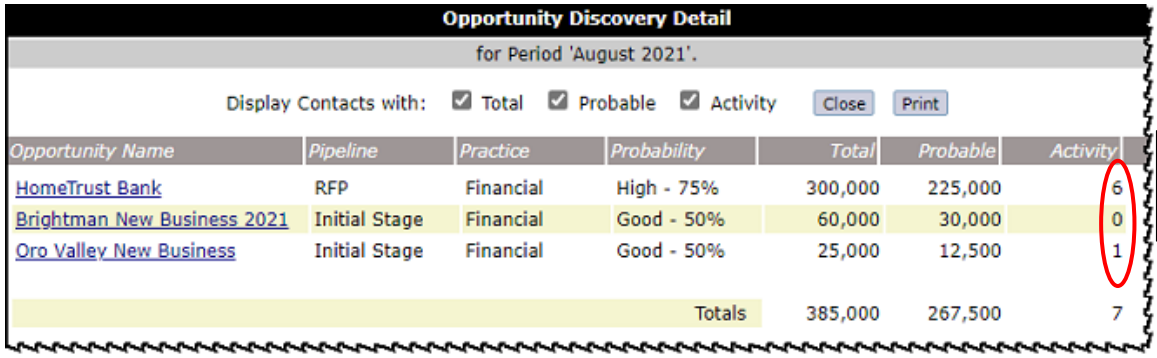
This feature has the same functionality as the new Communications Discovery. Each user's linked Opportunities are pre-selected; the selection options are within these only. There are Opportunity selection options, and choices of data type and time range. The Show Chart display includes both bar and pie graph presentations, with drilldown to more detailed information.

Opportunity selection options include Pipeline, Probability and Category (all firm-defined codes) as well as Company, City, and State. Each option opens a selection window of values for easy choice. Data Types are Count, Total and Probable Revenue, or Averages for Total and Probable Revenue. The Time Range can be Current Year, Quarter or Month, or Last Year choices including 6 Months. The example on page 24 has selection by Probability only, with Total and Probable Revenue for Current Quarter.

Hover the pointer over a color bar, or pie section, to see a "tip" of the total count or amount for that data type/month, or entire time range. Click the bar or pie section to open the drilldown of specific Opportunities and selected data types, including activities; sample on p. 24. The number in the Activities column is clickable to open the listing.



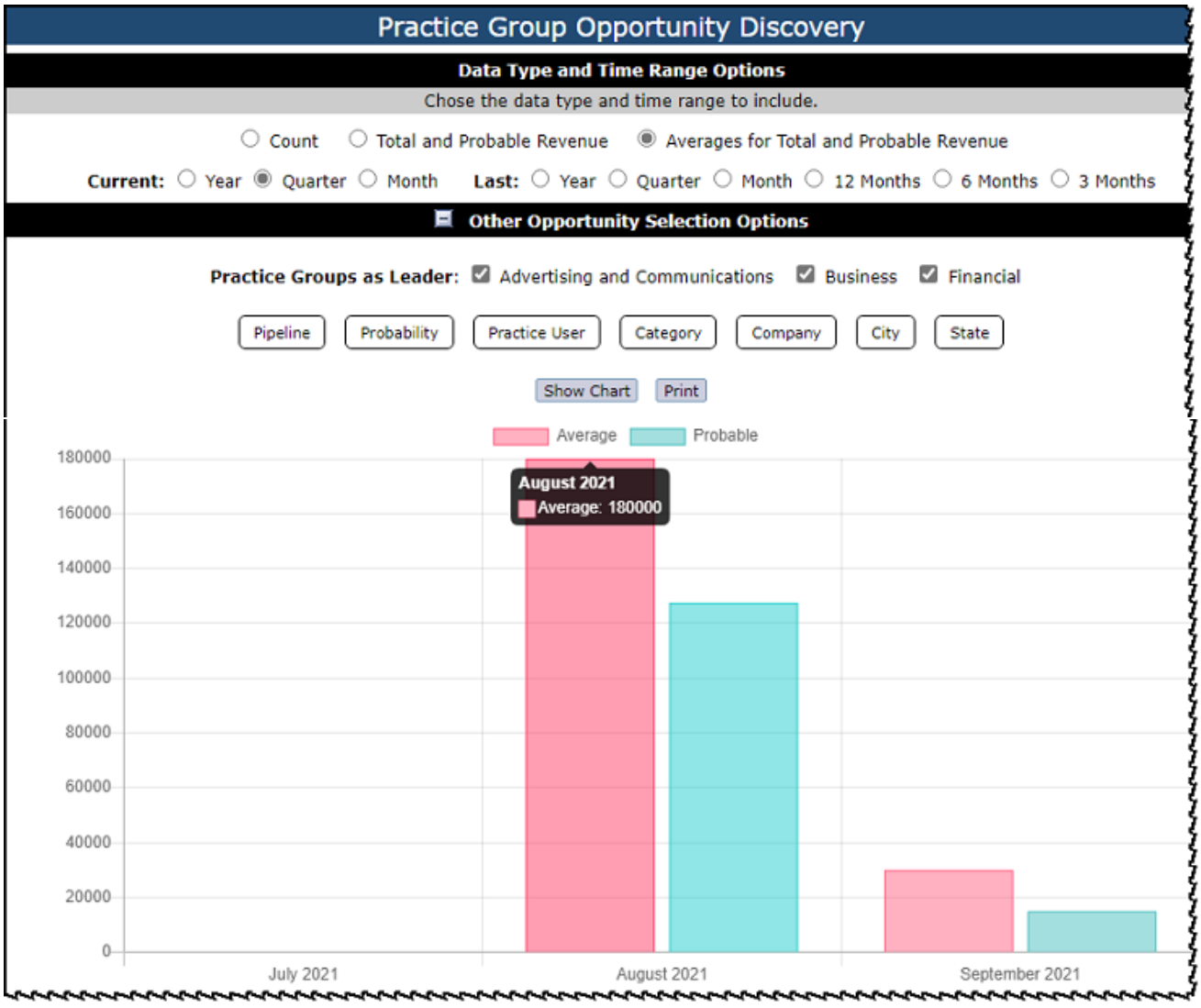
Drilldown on page 25:



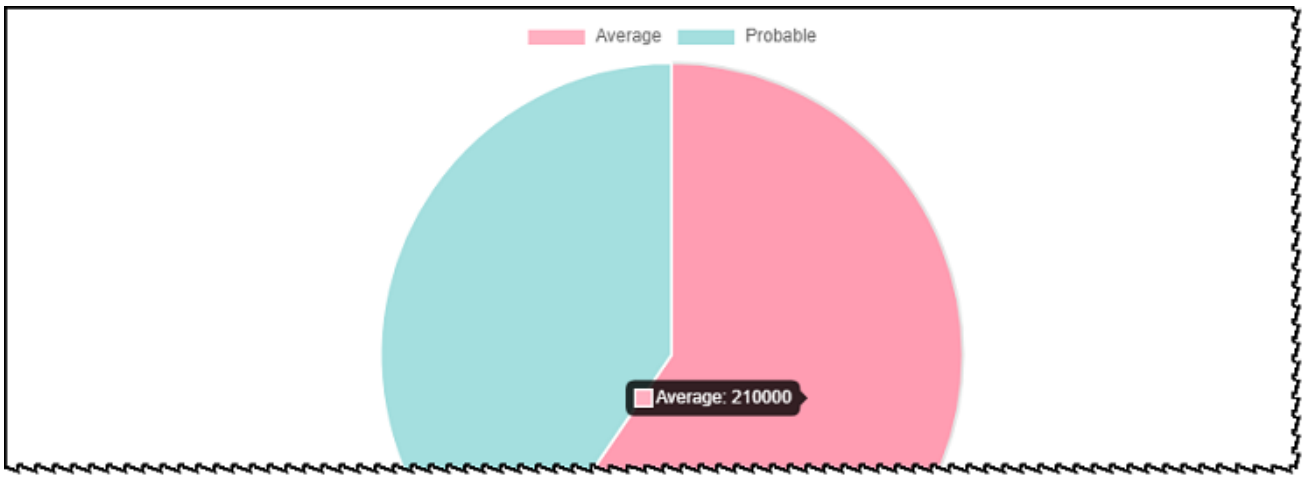
Click a number to open the list of Activities.

Practice Group Opportunity Discovery

This menu selection will be present only if the user is Leader of at least one Practice Group; Opportunities for these Practice Groups are pre-selected. All options will be within these pre-selected Opps only. All options and Show Chart features are the same as in the My Opp. Discovery.



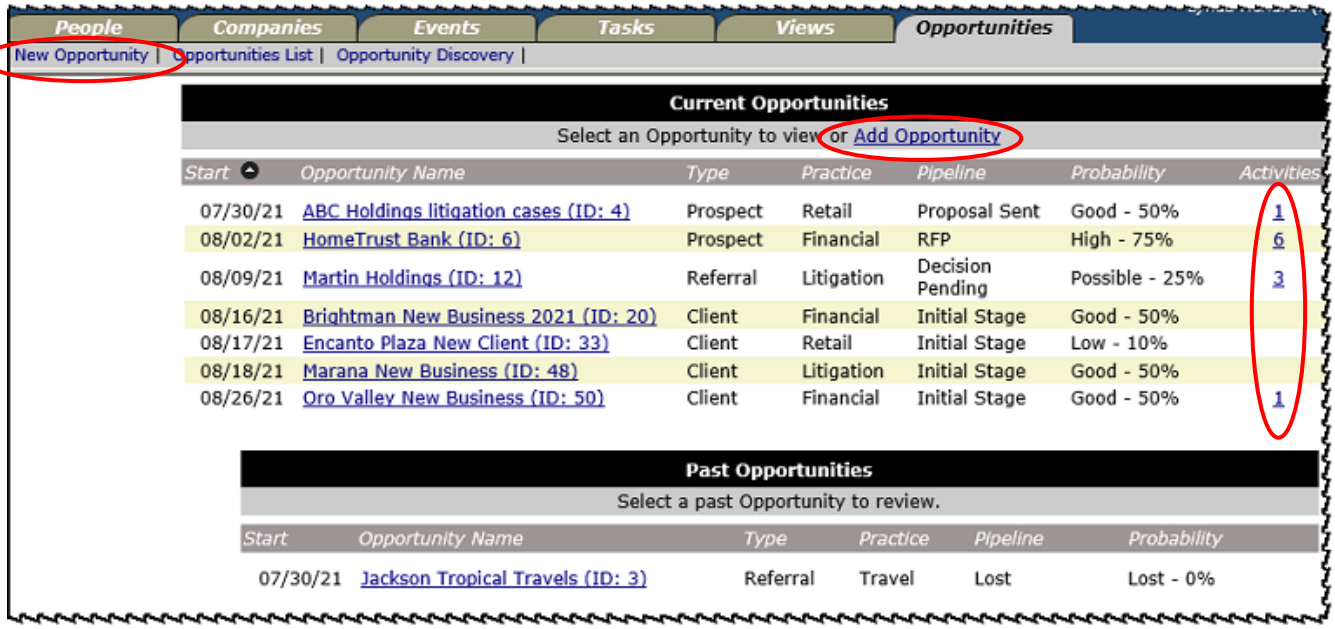
Pie graph section on page 26. As with the other Discovery types, hover the pointer over a bar, or pie graph section, to display a “tip”; click to open the drilldown window.



Drilldowns, from the bar or pie section, list the Opportunities included, with their Activity counts; activity numbers are clickable to open the list. (same format as in My Opportunity Discovery)

Web interface

All features are the same as in ContactLink, so that Marketing staff can add, edit, and view Opportunities. All selections are located on the new Opportunities menu, which opens with the List page, showing the Opps for ALL users. Users can edit one, add one from the link OR select New Opportunity from the menu, and view Opportunity Discovery graphs. Selection by Practice Group is available in the Discovery; all Practice Groups are available. The numbers in the Activities column are links to open the list of Activities. Past Opportunities are those with an End Date. Please refer back to pages 24 – 25 for sample screens, which are the same as in ContactLink.



Appendix 2: Changes and corrections

- Outlook Add-in

  -- Company Name Change: Dialog changed to clarify intent of moving the one contact to a new company, or fixing/changing the existing company's name and thus affecting all linked contacts.

  -- Add-in Control option "Search for contacts when 'Marketing Database' checkbox is checked" is also used when a contact name is changed.

- Edit Person

  -- Record for user, change email address: A warning popup asks for confirmation of change to user's email address; on confirmation, the user record's email address is also changed.

  -- Add to Outlook, if there is no Primary User and any changes were made: The white overlay shows the warning in navy text instead of red.

  -- Manage Events: IntelliPad Only events are available for linking.

- Edit Company, Show Company

  Text is "there are no contacts associated with this company" (instead of "there are no addresses").

- Contact Changes Review, Primary Review

  Corrected error in count and display when time limit expires and review record goes to main list.

- Create or Edit Event links in the web interface: The Override Mail Type fields are always disabled if the user is not authorized to edit them

- Copied mail tasks don't use the copied task's name, linked people, or people class.

- Import Contacts

  -- Source column added to both PeopleImports and MailActionsImports tables.

  -- Program removes leading, trailing blank spaces from all address columns.

  -- Import of invalid address is allowed, but the new "Manual Review Required" flag is automatically set.

  -- Program also looks at companies with no linked contacts, when trying to match an incoming company.

  -- Import Editor, Event window re-designed for clarity of use.

- Custom fields

  -- Lookup type is available, with all IntelliPad tables.

  -- If deleted, the field is removed from all link details.

- Business Development Log: Default selection is "Include completed activities".

- Emails from IntelliPad

  -- Primary User Review: Shows the time limit from date of change.

  -- Summarized Email has "Back to Top" link at the end of each section.

  -- Contact deleted or unshared in Outlook: Emails go to the user and to the Marketing Administrator.

- Utility "Restore IsUser Field Values" changed to "Repair IsUser..."; shows any person records needing the IsUser value changed from 0 to 1 (is a user person record), and from 1 to 0 (not a user person record).