

IntelliPad CRM Product Development - August 2022

Release 8.0.1.1 introduces optional Add-in Sync processing (decentralized data synchronization). The IntelliPad Add-in for Outlook is now able to send Outlook contact changes to IntelliPad and IntelliPad contact changes to Outlook.

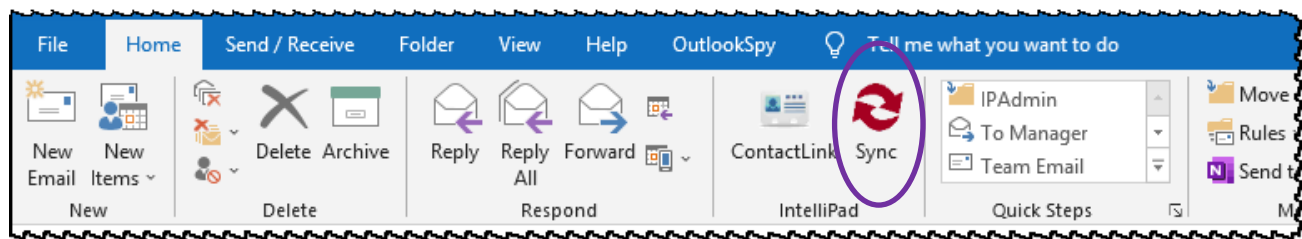
The Add-in Sync processing is available to all firms, but is required for firms using Exchange Online. This is because Microsoft will disable Basic Authentication for MAPI for Exchange Online customers as of October 1, 2022, and the IntelliPad legacy server-based sync requires MAPI and Basic Authentication.

The synchronization is done by attorneys when they use Outlook and are on the firm network. Their delegates (with at least Editor rights to their contacts) may be assigned to sync for them as well.

Enhancements and Changes in Outlook and ContactLink

- **Sync icon**

There is a new Sync icon, next to the ContactLink icon, in the IntelliPad section of the Home ribbon:



When the icon is GRAY, it means the sync is disabled or outside the firm defined time range. Usually the icon is RED when waiting between sync cycles. Then, when the sync program is running (usually for a few seconds) the icon arrows turn GREEN.

- **Add to Outlook**

Add to Outlook (in ContactLink) will be queued up and processed when the user next syncs (or when the next batch cycle runs.) This eliminates the often long wait to log onto the Exchange Server or Exchange Online.

- **Find Company Address link disabled**

In the IntelliPad General area, when the option to restrict search to one's own linked contacts is activated: The Find Company Address link is now disabled along with the Find Contact Company links.

However, if any users should be authorized to search for matches when adding new contacts: Their Add-in Options can activate either the Automatic Search or Prompt to Search—for contacts, companies, or both.

- **Marketing Page title**

The title in the page header has been changed to "IntelliPad – Marketing Page" from "Shared Contact Information".

Enhancements and Changes in the web interface

- **User Sync Assignment**

Any user can have a list of other active, non-virtual users to synchronize. For example, an assistant (may be virtual) would have one or more attorneys assigned.

- **Add to Outlook**

Add to Outlook (on the Edit Person screen) will be queued up and processed when the user next syncs (or when the next batch cycle runs). This eliminates the often long wait to log onto the Exchange Server or Exchange Online.

- **Batch Task Management**

All IntelliPad tasks that must be synchronized—such as Add to Outlook, Batch Add to Outlook, Contact Audit, and other utilities—are shown in this screen, for each user, while waiting to be processed. On completion, tasks are removed from the display.

- **Add-in Sync Activity Log**

All actions taken by the synchronization program, for each user, are written to this log; so there are hundreds of entries. Accordingly, there is selection by Quick date range choices like Last 15 Minutes, Last 30 Minutes, Last 1 Hour, Today, Yesterday. The log is automatically cleared every 24 hours.

The entries are sorted by user, with a clear sub-heading line for Firm and for each user name. Errors are shown in red text for easy recognition.

- **Management Menu Utilities**

When the Add-in Sync is activated, all utilities allow selection of synchronized users only.

- **IntelliPad Exception report**

This report now includes the date and time the last user sync process ran, as well as the list of Active Users not synchronized (i.e. virtual users).