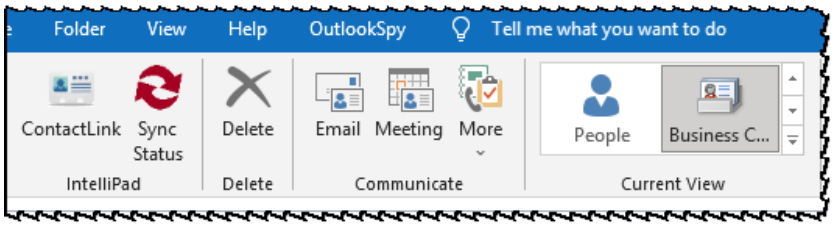
IntelliPad CRM Product Development – October 2023

Release 8.0.1.2 introduces new design features, icons, and color palettes in Outlook, ContactLink, and the web interface. Changes include handling of potential contact and company matches in Contact Changes Review. All 14 of the 8.0.1.1 patches, and 9 Add-in patches, from Aug. 2022 through July 2023, are included in this release.

NOTE: Everyone who uses Outlook and ContactLink, or the web interface, will need to "clear cache" for their browser (whatever browser is used). Internet Explorer is no longer supported. Please ask your IT staff, or Versys, for help if needed.

Outlook

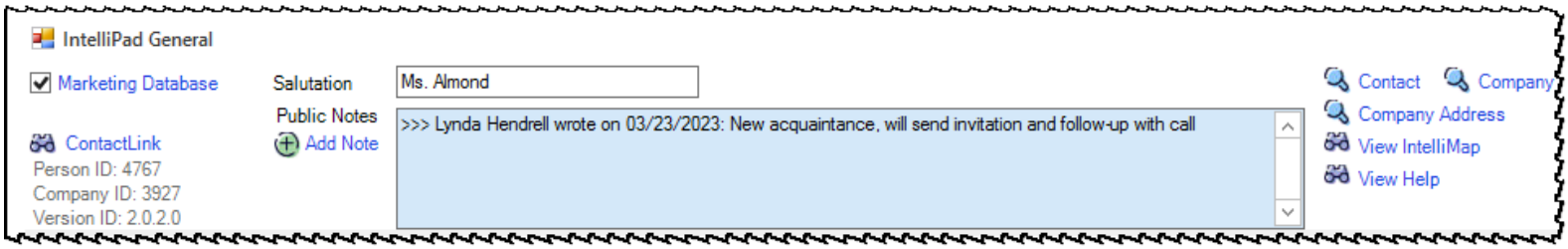
Sync icon changed to "Sync Status"



The web browser version of the Add-in is no longer supported; the Chromium version is 2.0.2.0.

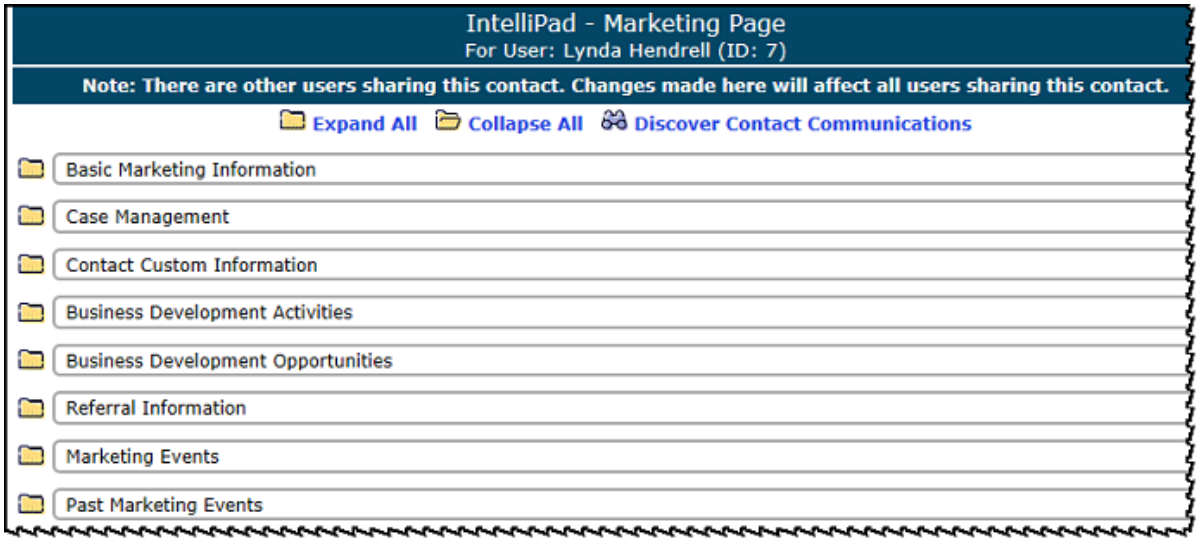
Contact page, IntelliPad General area

New icons: Binoculars (open ContactLink, IntelliMap or Help), Magnifying glass (search), Green circle with + (add).

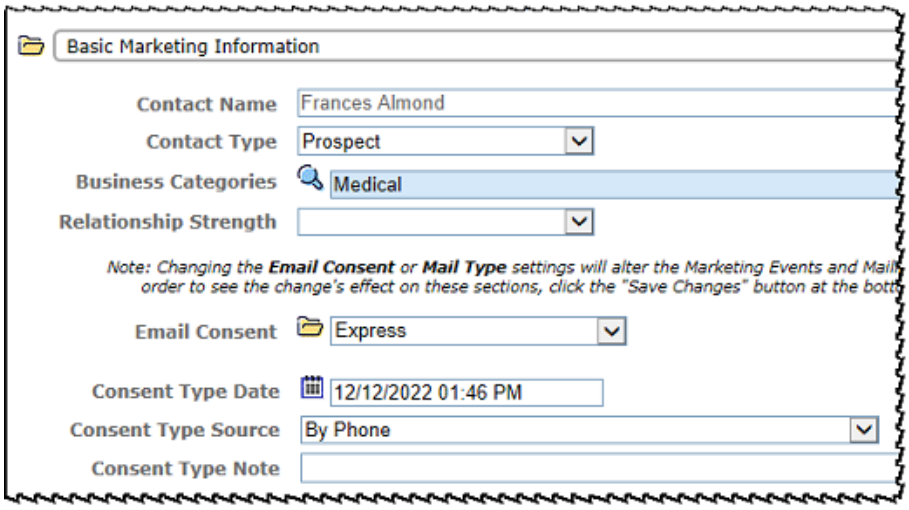


Marketing page

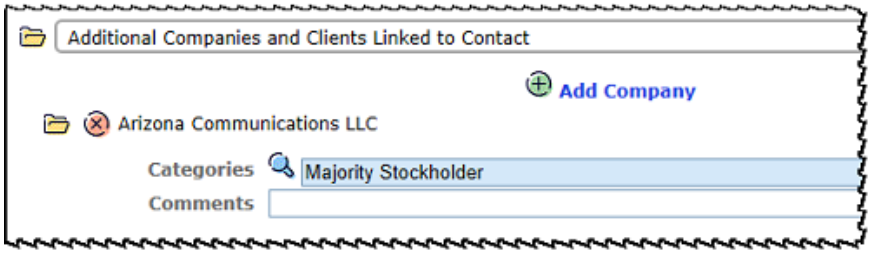
The new color palette includes shades of blue, gray, and blue green. The new page design is shown below, with File Close and Open icons, and Binoculars icon for the Discover feature. The section descriptions are also clickable to open—pointer over changes the text to red. Here and within all sections, clickable choices are in **blue bold**, and pointer over turns text to red—as the Expand All, etc. Either text or icons can be clicked.



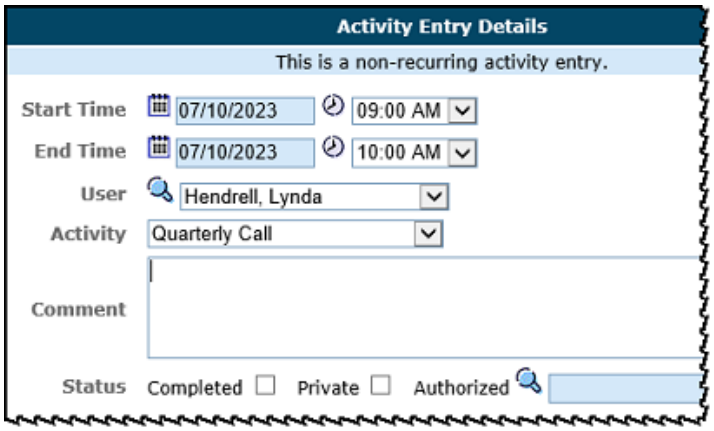
Within open sections there are File, Magnifying glass, and Calendar icons:



Section with Add (+) and Delete (x) icons:



Calendar and Clock icons in Activity Log entries:



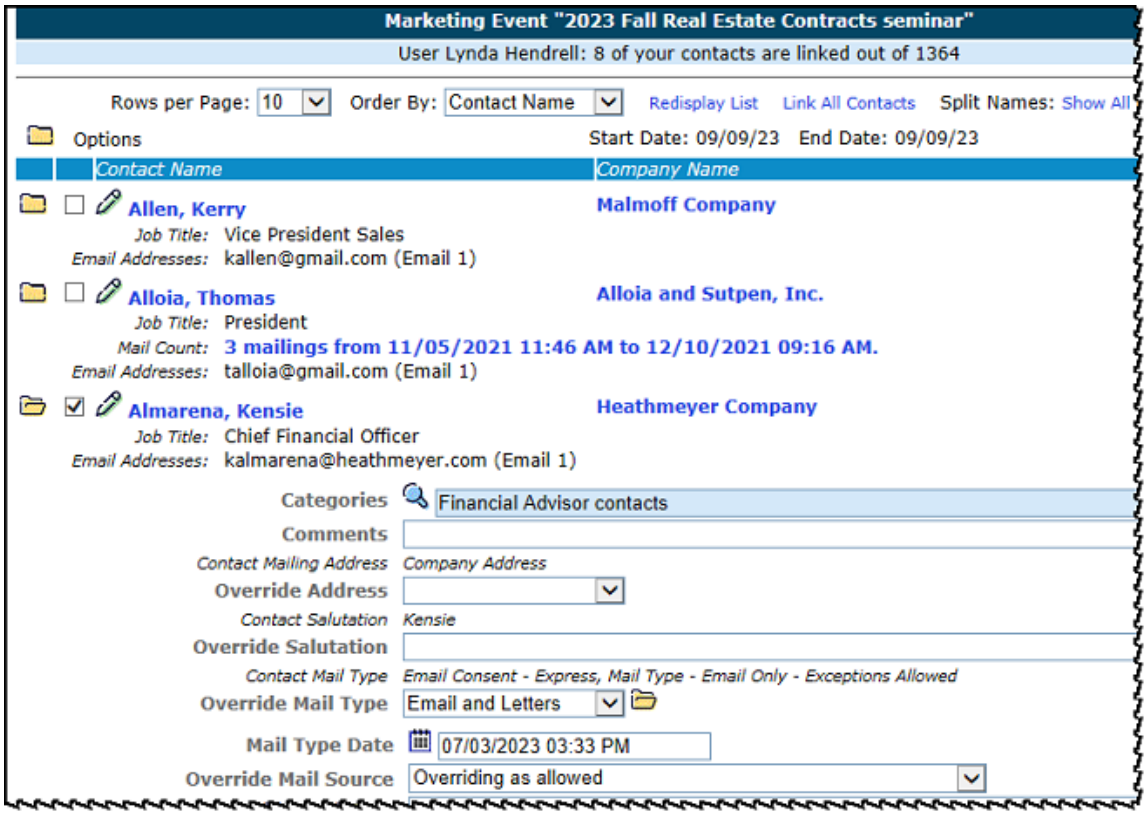
ContactLink

New color palette includes shades of blue, gray, and blue green. Clickable names, actions, options, event names, dates, page numbers, etc. are in **blue bold**—pointer over turns text red to click. (Some clickable text is blue but not bold.)

New icons: File Open and Close for details, Magnifying glass (all searches and code selection), Calendar (date selection), Clock (time selection), Pencil (edit), Red circle with x (delete).

Company Search results, Get All Company Contacts, showing File icons and blue bold for clickable names:

Contact list page for Marketing Event or Mailing List, with open link details:



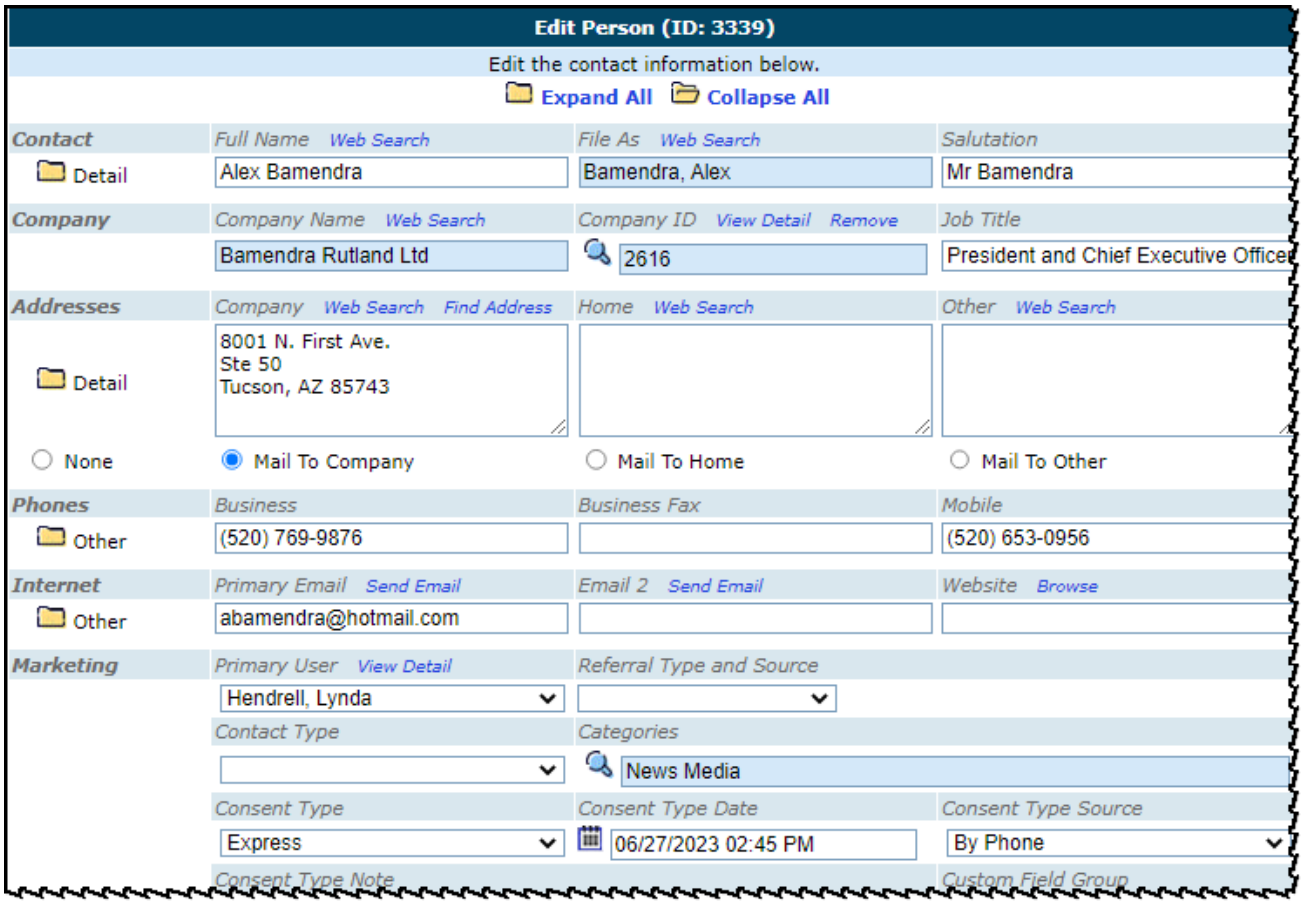
Web interface

New colors and icons

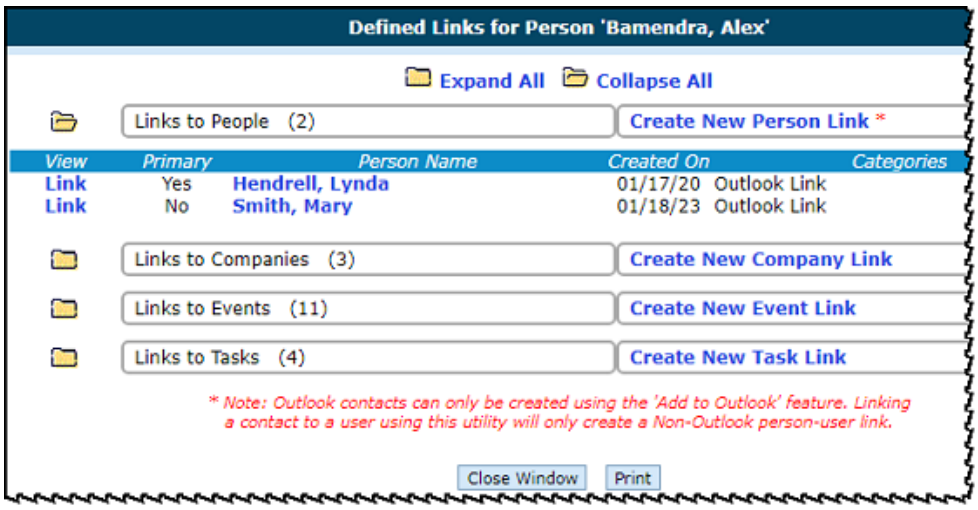
New color palette includes shades of blue, gray, and blue green. Clickable names, actions, options, dates, etc. are in blue text, sometimes **bold**—pointer over turns text red to click.

New icons: File Open and Close for details, Magnifying glass (all searches and code selection), Calendar (date selection), Clock (time selection), Pencil (edit), Green circle with + (add), Red circle with x (delete).

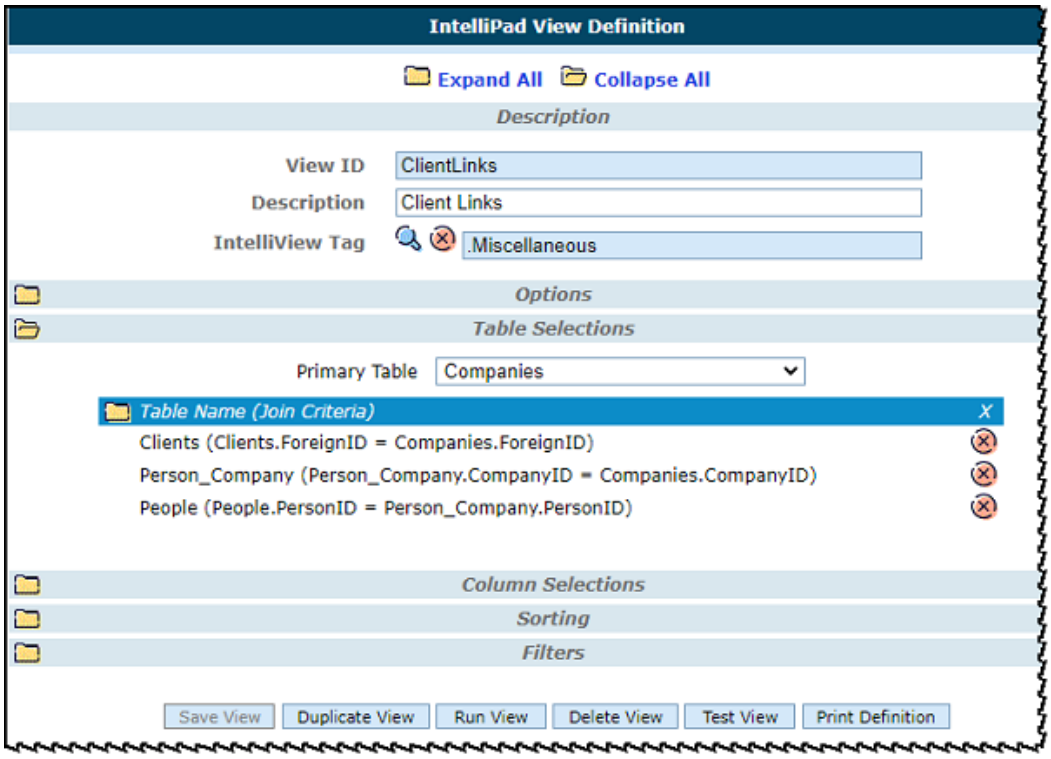
Sample Edit Person page:



New design of Defined Links page:

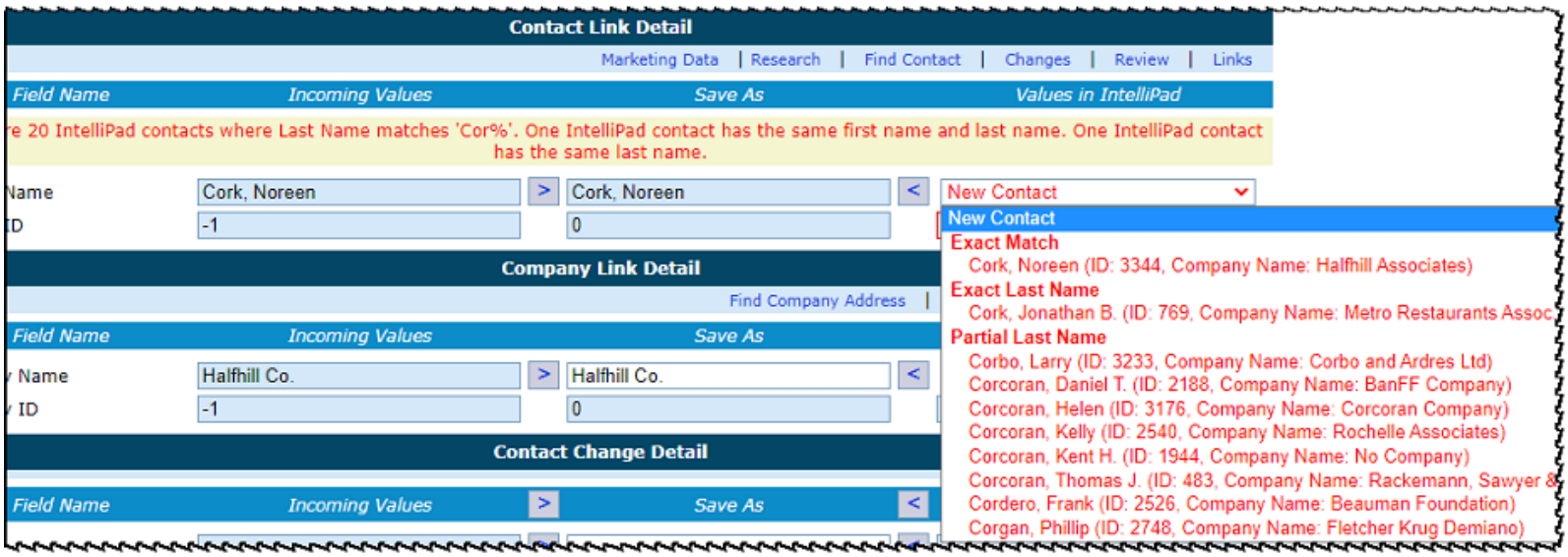


Sample View Definition page showing File and Delete icons:



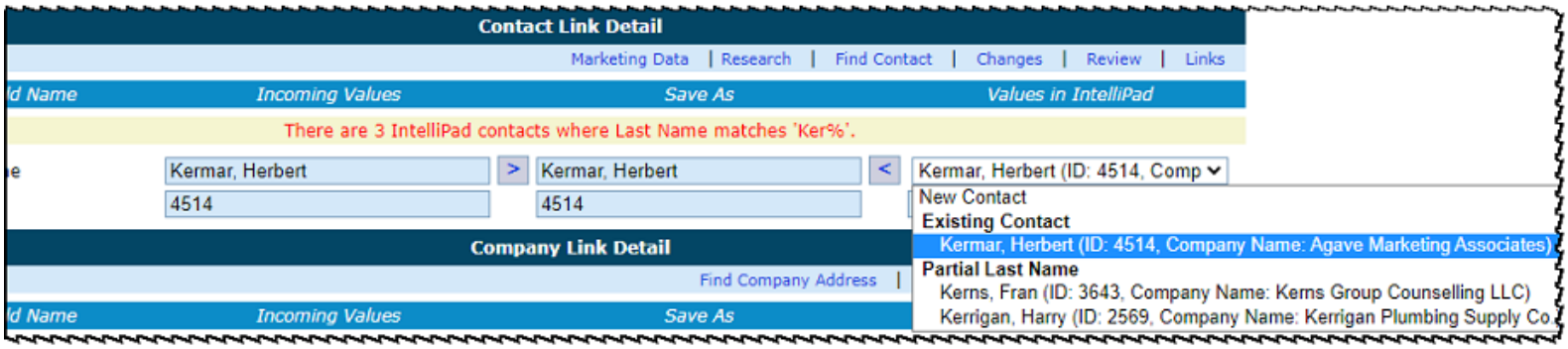
Contact Changes Review, handling of possible matches

From Patch 14. For new contacts: Exact Matches are first in list (if any); then Exact Last Name, then Partial Last Name. There are a maximum of 10 names in the list:

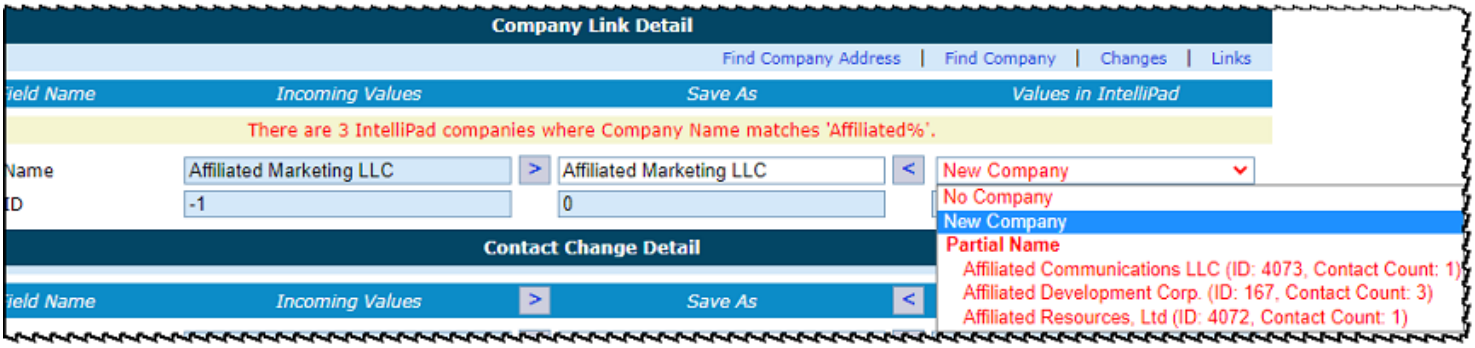


For change records: The Existing Contact name plus a maximum of 9 (Exact and) Partial Last Name matches are listed:

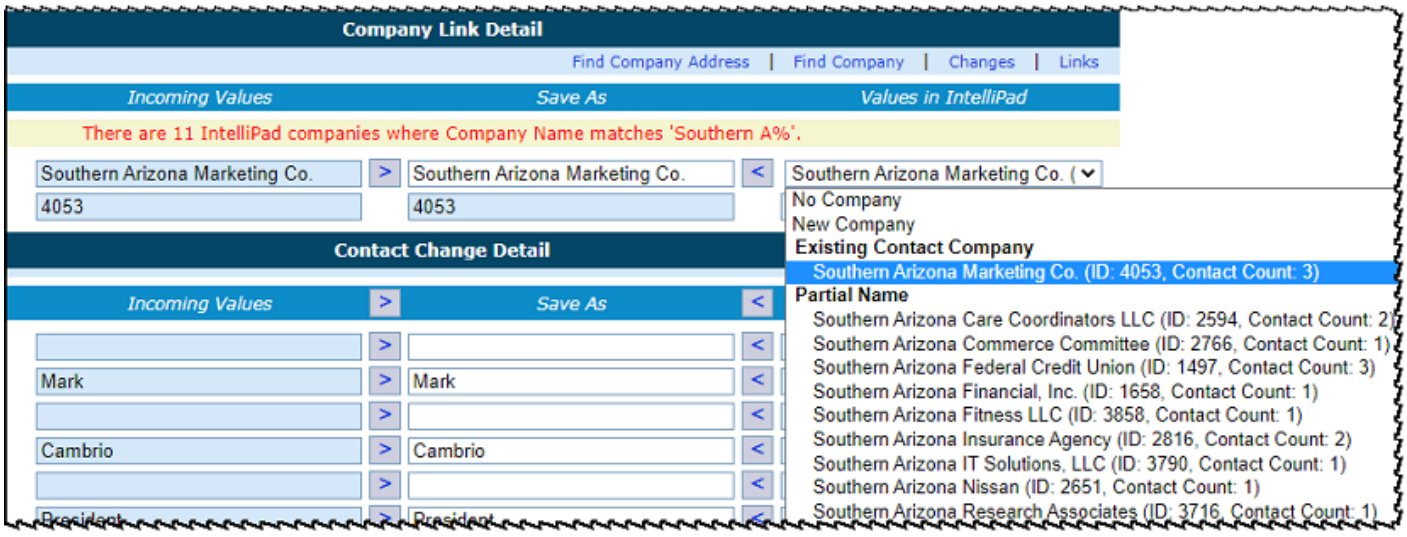
(sample has only 2 partial matches)



For new companies: An Exact Match is first (if any), followed by a maximum of 9 Partial Matches (must match first 10 letters):

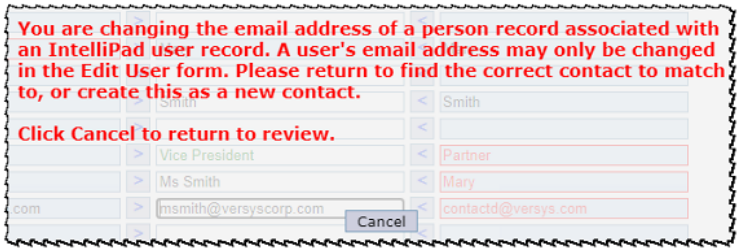


For companies in change records: The Existing Company name is first, followed by a maximum of 9 Partial Name matches (matching first 10 letters):



Contact Changes Review, select user person record as match

From Patch 14. A user's person record can be selected as the match HOWEVER if the incoming review record has a different email, acceptance is not allowed with this warning:

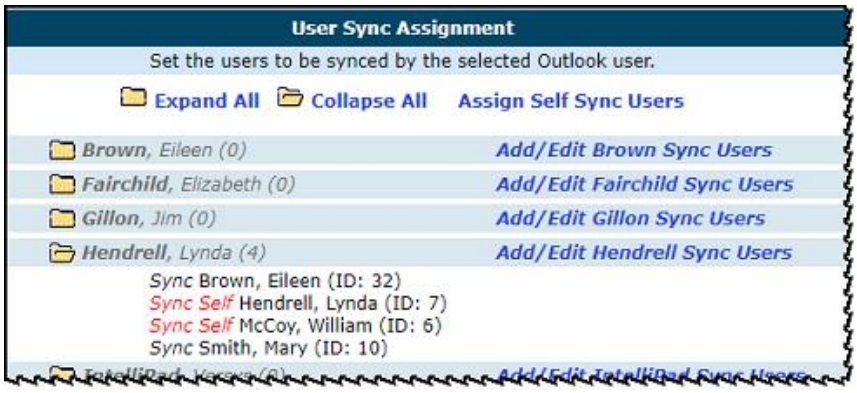


Export Management "Contains" filter

From Patch 14. A user number can be entered in the "Contains" filter, in the format "User: #" as shown below, in order to filter the list by a single user who is waiting to receive export records.

User Sync Assignment

Added Sync Self identifier to list and detail displays, for easy recognition of the users who synchronize their own contacts. Note that users can synchronize themselves and other users, or can synchronize themselves and be synchronized by another user.



Changes

Outlook

- ContactLink and IntelliMap now open directly in the web browser instead of a window.
- ContactLink contact and company detail windows have an added window resize (800 x 800) to account for different opening windows.
- The User Sync processing was changed from User ID order to alphabetical order.
- The ForOutlook attribute was added to allow for Microsoft corruption of date/time fields.

  This applies to the Create ICS program for the event/mail tasks. The ICS standard requires dates formatted to include time zones in international format, but MS Outlook requires different time zone tags. The ICS attachment makes it easy for email recipients to create calendar entries.

Scheduled Tasks

- Notify Admin: Changed the SQL for the “not synced” query to use the Users.SyncTime field.
- Purge Logs: Added automatic LogBatchCycle purging of entries older than 48 hours when Add-in Sync Processing is enabled.