IQ5 New Features Version 1.4

General-Home Page

▶ All attachments can now be viewed or downloaded based upon the users choice after upload.

▶ The **Service** home page tile now includes IQ "Groups" in the "Queued/Assigned To" field. This will provide links to Services queued to that Group, and Services queued and/or assigned to members of that Group based on the Service chosen in the "Template" field.

▶ The **My Alerts** view in the **My Inbox** application now displays a four-line preview of the alert message text within the list view.

▶ The Voicemail Set and Voicemail Tile have been added to the Home Page.
  - ○ ***Note**: Only available for the House of Representatives at this time – testing in the Senate is underway.

▶ A new tile called Custom Tile has been added, which allows for unique presentation of certain data within IQ. This tile requires a custom set up and will involve your IQ Consultant. Reach out to them for more details.
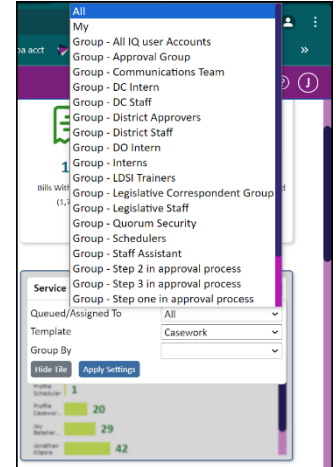
Contacts

▶ The "Add Event" option is now available as an in-row action, menu action, and reading pane button for Contact records. This will allow users to create a new IQ Event with that Contact attached to it.

▶ The ability to Import Contact Email Updates is now available! This is currently limited to .CSV or Comma Delimited files with up to 4 email addresses per Contact.

▶ A "Search and Add to Menu" button has been added to all IQ5 Advanced Search pages making it easier to save searches and repeat them in the future.

▶ Users can now assign an "Agency Code" and "Agency Category" when adding a new Contact record via the "Find or Add Contact" in IQ5.

▶ A new edit icon (pencil) has been added next to existing Household links in the Contact reading pane.

▶ Under Contacts Advanced Search, a new "Agency Contact" search option has been added making it easier to find existing Agency Contacts.
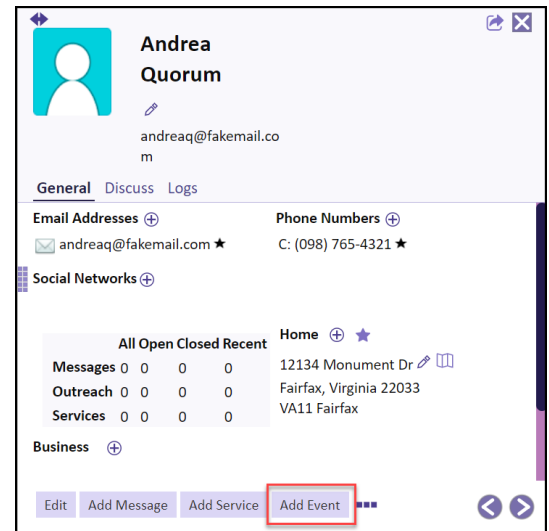
Messages

▶ The **Finder** action has been added to the Batch in-row action menu, allowing users to run the Adhoc Campaign Finder on the Message records within a Batch.

- Messages with an Email "Out Method" can no longer have their status changed to completed by the "Change Data and Status" action. This will prevent Emails being counted as "Sent" when they have not been "Sent".
- A new Security Lock has been added to better control which IQ Users have access to editing existing/adding new Batch Rules. Talk with your IQ Consultant for more details.
- The "Change Data and Status" option has been added to the Messages in-row and grid actions on the "Adhoc Campaigns" page (the page you are presented with after using the "Finder" tool), allowing users to modify campaigns data and status.
- Adding a new image to the IQ Image library is now available for MMS Text Messages, Form Letters, and Message records with Custom Letters.
- The ability to Send Email has been added to the Campaigns and Adhoc Campaign Finder grid in-row actions and Reading Pane footer.
- When viewing a list of Messages, a new "Edit Contact" in-row action has been added allowing users to easily Edit the Contact associated with the Message Record.
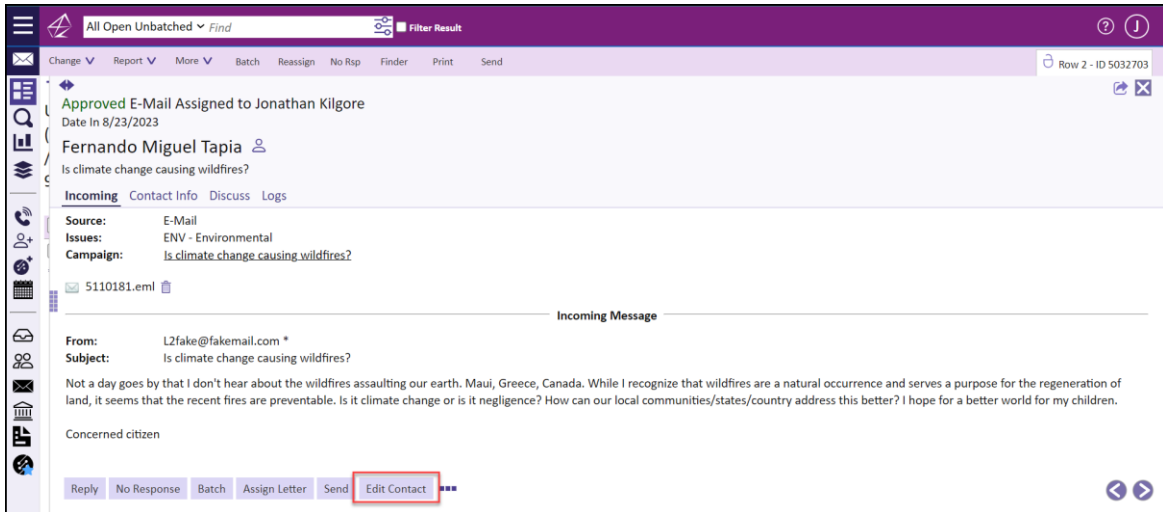
- Row Numbers have been added to all IQ5 Record lists, allowing easy tracking of rows when viewing records.
- The "Forward" in-row action is now available
- **Search Again** has been added to the Message Set records as an in-row action and in the Set Records Reading Pane. This will allow users to search for another existing Contact record or add a new one for a record within the Set.

Library

- The Library Views panel now includes a "Directory Views" expandable folder tree. It has two separate submenus for "Form Letters" and "Files."

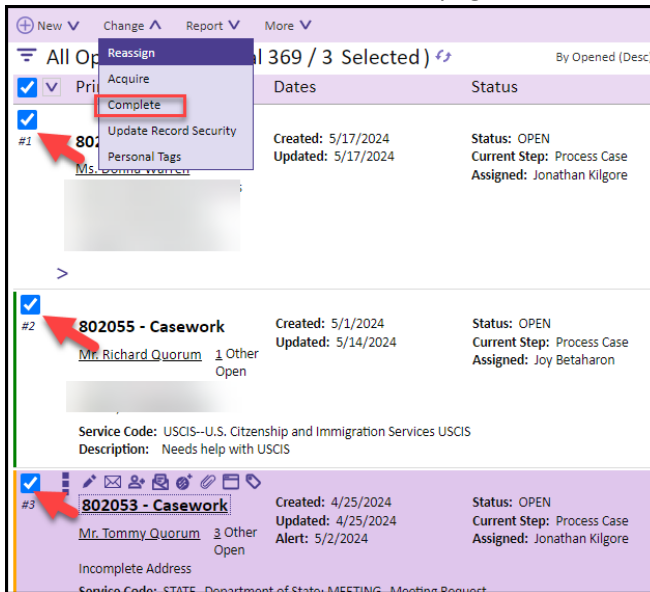## Services

- When only Service-related Message records are selected and then the 'Send' multi-row action is clicked, the text "Duplicate non service-related messages to the same contacts selected for emailing will be closed automatically!" is no longer displayed in the Message Send Email dialog.

- When adding a new service to a message record, users can now add any type of service template (not just preferred ones).
- The Reopen Service dialog window contains a radio option to "Change Status" for a closed Service record. This dialog can be accessed by selecting "Reopen" in the in-row action menu or clicking the pencil icon to the right of the Assigned User in the Summary section of the Service Reading pane.
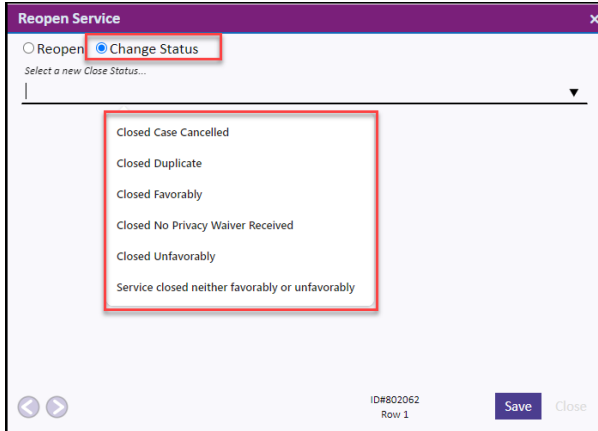
- Users can now mass complete services by accessing the "Complete" option under the "Change" multi-row action on the Services list page.



- Text entered into the Activity section of a Service record that has not yet been posted, no longer disappears when switching back and forth between different tabs.
- The Services "Print Summary" and "Print Summary by Section" Step Applications are now available.

Outreach

- The Report tab in the "Mass Text Sent" Reading pane has been updated to include counts for: Total Sent, Delivered, Undelivered, Received and Opt Outs. Bar graphs were added for

"Outgoing" and "Incoming" Messages with percentages for: Delivery Status, Messages with errors, Messages Received and Opt-out Rate.
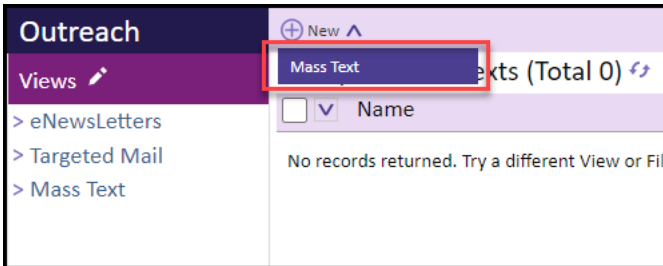
▶ The "New Subscriber" Tile now allows users to drill down into a new subscriber list when a link is clicked.
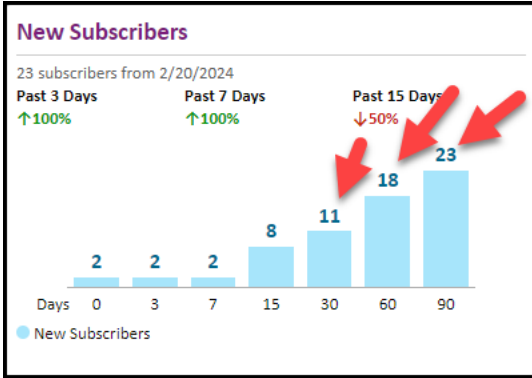
▶ The "SMS Mass Text" tile has been added to the Home Page, displaying the last five completed Mass Texts records with ID links and a "View All" link.

▶ A new "Mass Text" option was added to the +New dropdown menu option that opens the "Outreach Text Wizard". Also, a new Universe/View called "Open Mass Texts" was added.

- ▶ Webforms and Surveys can now be included in individual Text SMS and Text MMS messages.
- ▶ When an open Outreach eNewsletter has an embedded survey, and a user expands the "Content" tab within the Reading Pane, the Survey HTML formatting tags are no longer visible.
- ▶ The ability to create a new or edit an existing IQ4 eNewsletter has been removed. In addition, the "eNewsletter IQ5 BETA" option has been renamed as "eNewsletter" under the + New menu.
- ▶ "Geographic" options (i.e. City, County, etc.) have been added to the Add & Exclude section in the "Select Audience" step of the Newsletter Wizard.
- ▶ When adding a new Issue Code in the Review step of the eNewsletter wizard, users can now access them instantly from the drop-down list without having to refresh the page.
- ▶ "YouTube" has been added to the "Insert" menu in the eNewsletter editor.
- ▶ The "Delete" in-row action is now available for deleting an eNewsletter.
- ▶ A "Geography" filter option has been added to the Audience tab in the SMS Wizard.