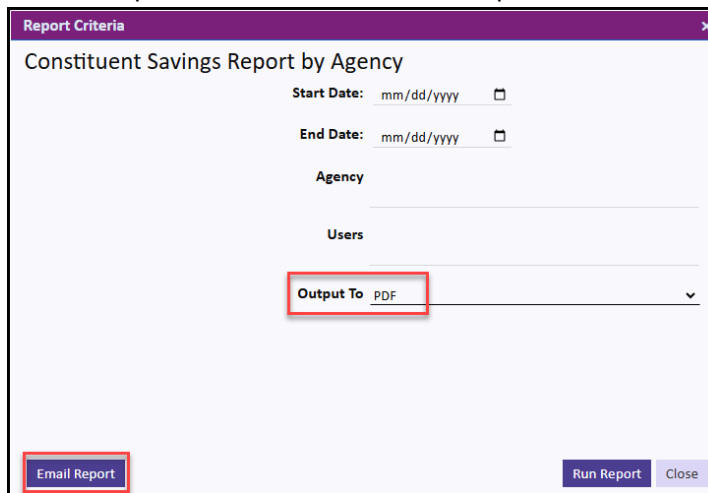


## IQ5 New Features Version 1.6

### General/Home Page

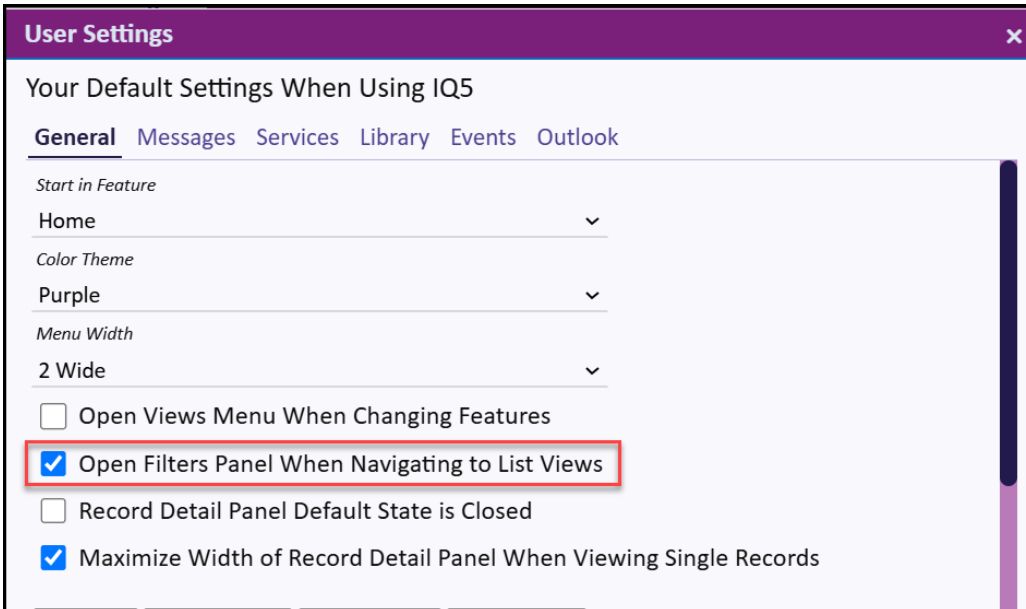
- ▶ Active reports (by application) can now be scheduled to email their results via an "Email Report" button at the bottom of the popup dialog. When being sent with a PDF output method, the emailed report can also be locked with a password.



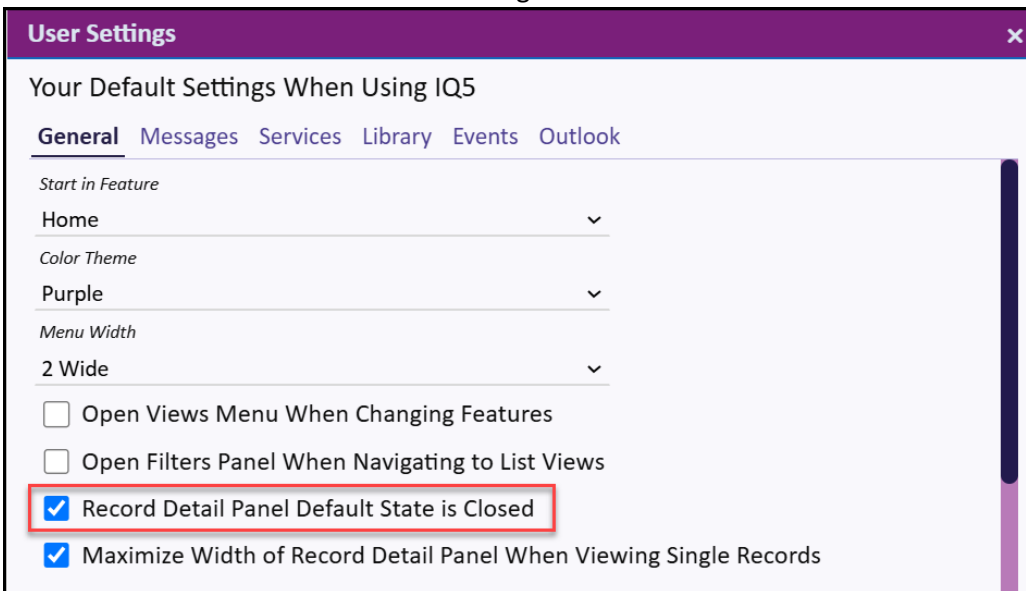
- ▶ You can now pin a new "Mobile Entry" feature to the Quick Action bar! Clicking the cell phone icon opens a "Mobile Entry" dialog where you can search for a contact by Nameline, Email or Phone, add comments, affiliation codes and response instructions. You can add this in the User Settings under the "General" tab in the Pinned Quick Actions section.



- ▶ A user can now choose to automatically open the filters when accessing the list views of records. The option, "Open Filters Panel when Navigating to List Views", has been added to User Settings. *Note:* This setting takes precedence over the "Open Views Menu When Changing Features" if the user has both options checked.



- ▶ A user can choose to keep the detail panel closed as a default setting. The option has been added to the General tab in the User Settings.



- ▶ The **My Work Summary** Tile has a new link! In the Services section, you can now access services that have been "Updated in the Last 7 Days". **Note:** This universe may contain closed services, since closing a service is an update.

### My Work Summary

My Services	
Open	47
Alert Past Due	12
Queued	1
Active	46
Open Service Messages	41
Updated in the Last 7 Days (2)	2
Changed by others (02/07)	4
Messages Needing My Approval	2

## Contacts

- ▶ There are three new Mobile/Cell Phone number filters available in Contacts:
  - Has Mobile
  - Has Valid Mobile
  - Primary Mobile Number
- ▶ Users now have the option to manually add or update phone status attributes to Contact Records. In the Edit Contact dialog there is now a drop-down field in the Communications tab called "Phone Status." Note: This field only appears when there is a phone number entered for the Contact Record.

## Library

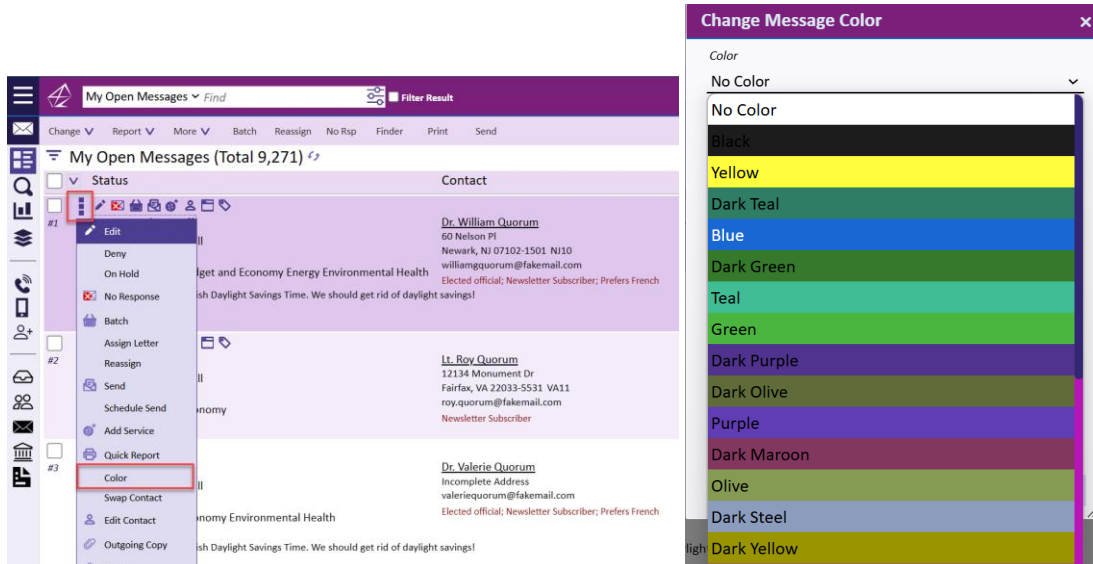
- ▶ The **Click-through Data** feature has been added when editing Form Letters, under the **Detail** tab, and is displayed in the Reading Pane if links are available under the **Details** tab.
- ▶ The Reading Pane now displays Form Letter Status changes graphically at the top of the pane. This will show your default color until the letter is Approved which will be Green or Red when Denied.

The screenshot shows the 'All Form Letters' interface. At the top, there are navigation options like 'New', 'Change', 'Report', and 'More'. Below this is a table of form letters with columns for Document, Created, Assigned, Size, Status, Revised, Open, and Total. The table lists several letters, including 'EQUITABLE EDUCATION v.1', 'Oct 1 - Sample Letter v.1', 'Wildfire Batch Response v.1', 'FLWorkshop92524 v.1', 'BILL HR598 v.1', and 'CLIMATE CHANGE 2030 HR598 v.1'. The 'Wildfire Batch Response v.1' row is highlighted in purple. To the right of the table is a detailed view for the selected letter, showing its title, status (Draft/Approved), and various tabs like 'General', 'Details', 'Fill-Ins', 'Format', 'Discuss', and 'Log'. The 'Details' tab is active, showing fields for 'Constituent', 'Position', 'Track change', 'Email Subject', 'Email Address', 'Email Format', and 'Print Format'. At the bottom of the details pane, there is a 'Click-throughs' section with a table containing 'ID', 'URL', and 'Affiliation'.

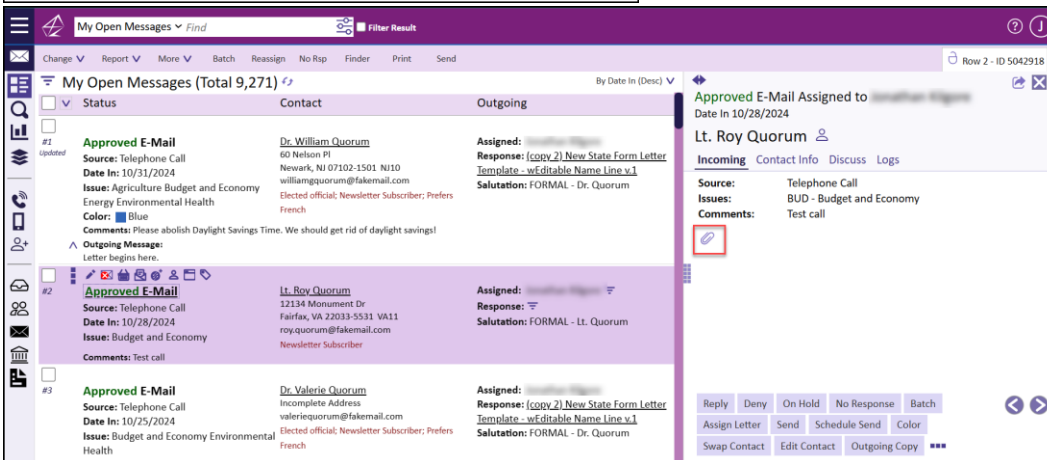
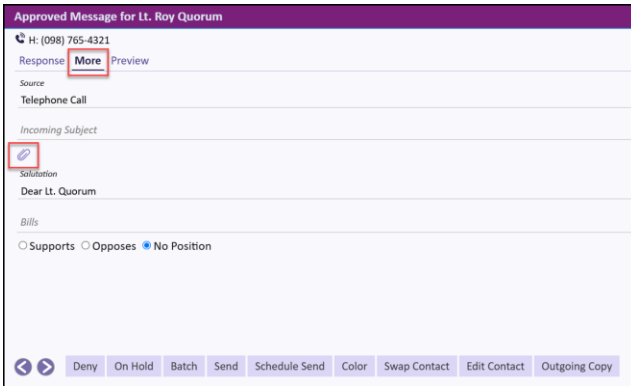
Document	Created	Assigned	Size	Status	Revised	Open	Total
#6 EQUITABLE EDUCATION v.1	10/15/2024	Jonathan Kilgore	24kb	Request Approval (by Joy Betaharon)	10/15/2024		
#7 Oct 1 - Sample Letter v.1	10/1/2024	Joy Betaharon	24kb	Approved	10/9/2024		
#8 Wildfire Batch Response v.1	10/1/2024	Jonathan Kilgore	24kb	Approved	11/1/2024		
#9 FLWorkshop92524 v.1	9/25/2024	Jonathan Kilgore	24kb	Request Approval (by Joy Betaharon)	9/25/2024		
#10 BILL HR598 v.1	9/24/2024	Jonathan Kilgore	24kb	Request Approval (by Joy Betaharon)	9/24/2024		
#11 CLIMATE CHANGE 2030 HR598 v.1	9/19/2024	Jonathan Kilgore	24kb	Approved	10/15/2024		

## Messages

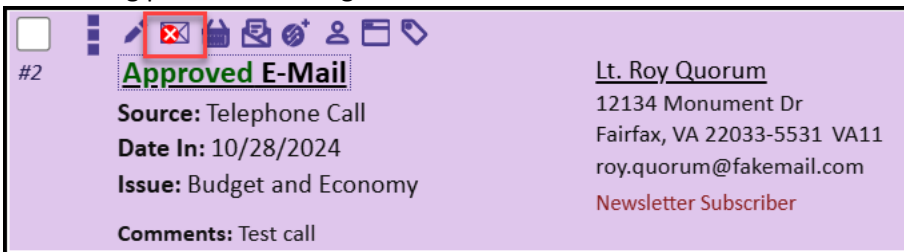
- ▶ New Action for Color Coding individual Messages Records.



- ▶ Senate: Offsite printing is now available when going to print responses in IQ5.
- ▶ A new filter, Form Letter Status, was added to the list of filters available when viewing Messages.
- ▶ An “Add Incoming Attachment” (paper clip) icon has been added in the “More” panel when editing a message record. Multiple files can be added either directly from the computer or by dragging and dropping them. This can also be found in the Reading Panel for a Message.

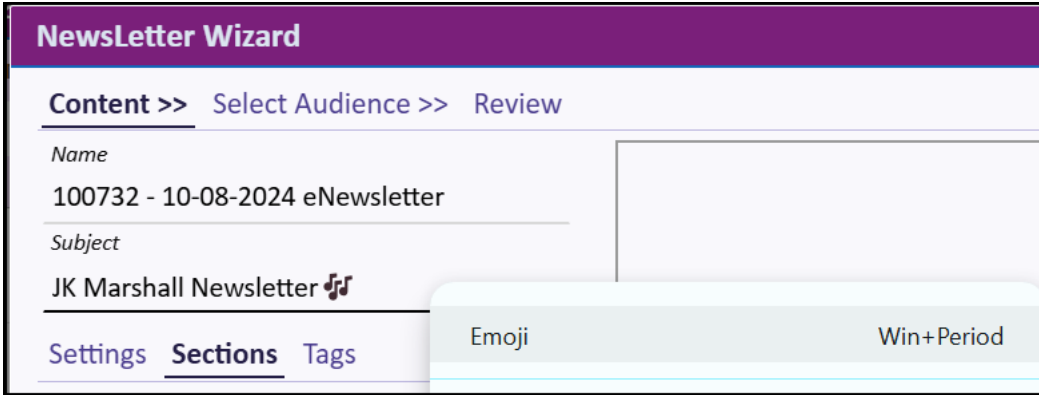


- ▶ A new in row action, “Complete with No Response” is now available when viewing lists of Message records. Note that this is in addition to the existing “No Response” button available in the reading pane of a Message record.



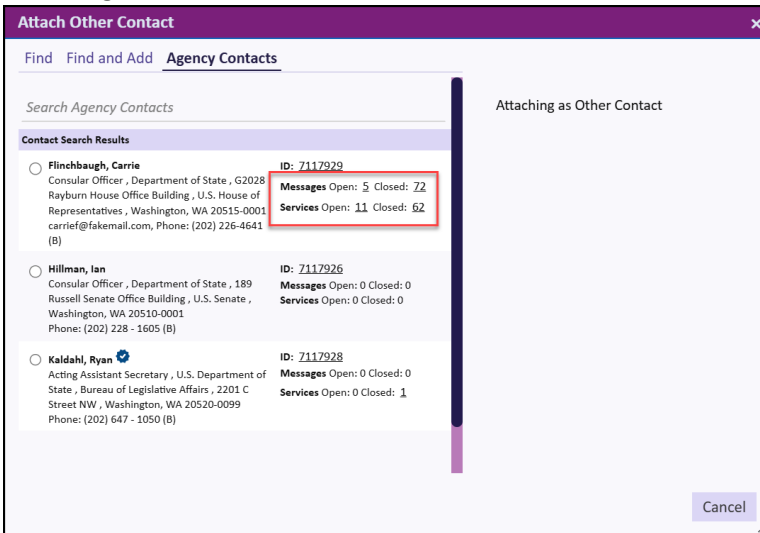
## Outreach

- ▶ The Newsletter Wizard now allows for browser based emojis in the **Subject** fields of the Content and Review steps.

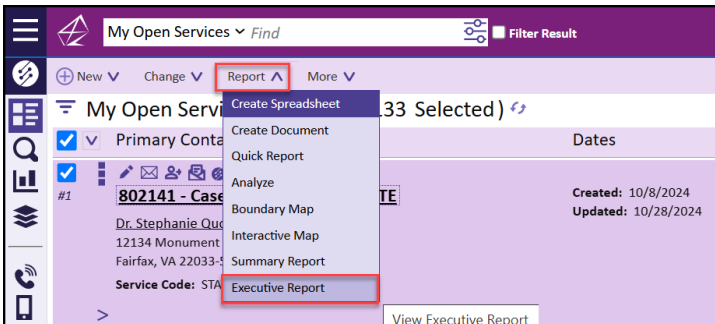


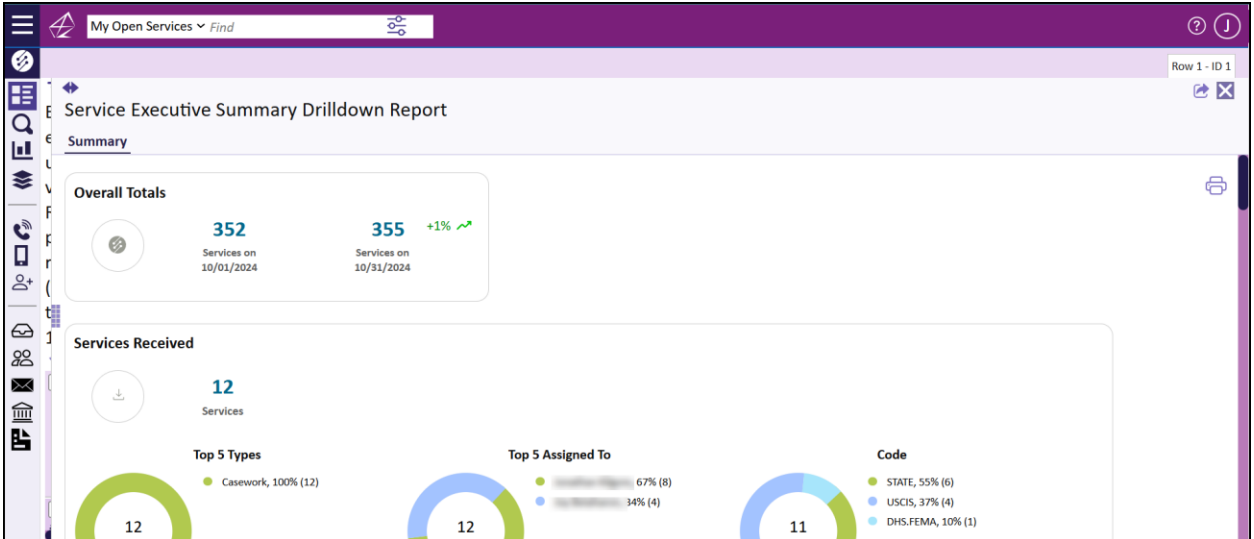
### Services

- ▶ Open and Closed Message and Service information is now displayed for Agency Contacts when attaching them to a Service.



- ▶ The Executive Report has been added to the options under the Menu Action, **Report** when viewing Services. This report can be downloaded for printing as well.





- ▶ Services now feature separating lines between sections making information more organized and easier to read.
- ▶ A new User Setting has been added that allows for a Contact's full address to display within a Service.
- ▶ The inline PDF viewer for Services has been replaced with a File Viewer dialog which allows for easier viewing and downloading of file types beyond just pdfs, such as .docx and .msg files.

**My Open Casework** Find Filter Result

Row 1 - ID 802141

**OPEN Casework - DEPT OF STATE for Dr. Stephanie Quorum**

Created 10/8/2024 5:01:28 PM by Jonathan Kilgore

Summary Activity Data Attachments Logs

Codes: STATE-Department of State

**Primary Contact** Other Contacts

Dr. Stephanie Quorum

12134 Monument Dr  
Fairfax, VA 22033-5531

C: (305) 000-0000  
stephanieq@fakemail.com  
Newsletter Subscriber

**Attachments**

- 06\_Contacts\_Using the Audience Builder.docx
- Join the Commercial & International Sector Town Hall on Oct\_30.msg

**Activity** Add Message Discuss

Search...

All Message Notes Attachments

Jonathan Kilgore  
Uploaded File Attachment - Join the Commercial & International Sector Town Hall on Oct\_30.msg uploaded without a note

Jonathan Kilgore  
Uploaded File Attachment - 06\_Contacts\_Using the Audience Builder.docx uploaded without a note

Library Files

Edit Complete Merge Services Actions

