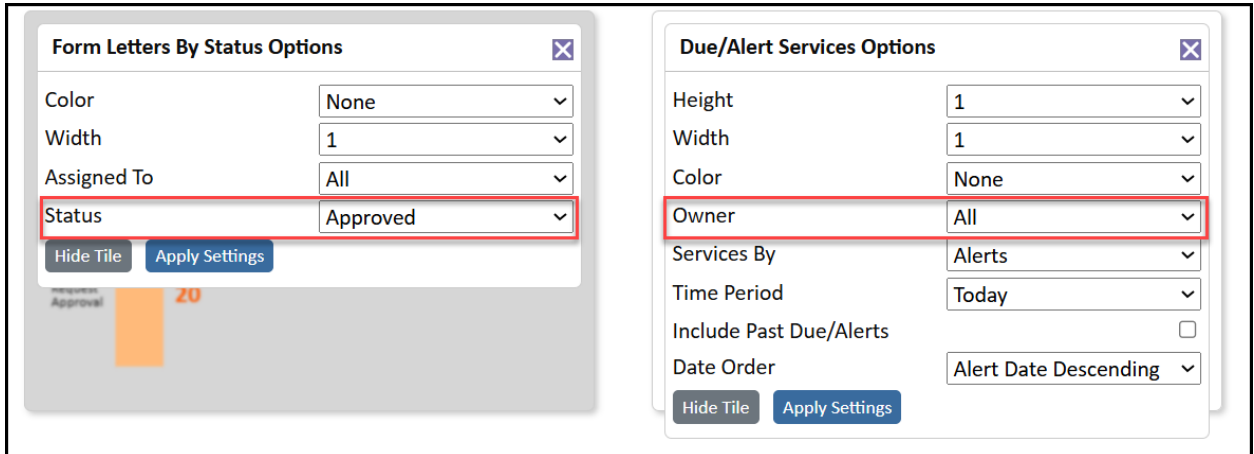


IQ5 New Features Version 1.7

Home Page

- ▶ The "Status" filter has been added to the 'Form Letters By Status' tile setting, allowing users to sort by "Approved", "Inactive", and "None" status options, reducing clutter and improving efficiency.
- ▶ The "Owner" filter is now available in the "Due/Alert Services" tile settings, allowing users to select services based on the 'All' and 'My' Due/Alert Service types.



Form Letters By Status Options

Color None
Width 1
Assigned To All

Status Approved

Hide Tile
Apply Settings

Due/Alert Services Options

Height 1
Width 1
Color None

Owner All

Services By Alerts
Time Period Today
Include Past Due/Alerts ☐
Date Order Alert Date Descending

Hide Tile
Apply Settings

- ▶ The Help Icon now includes a dropdown featuring a link to the IQ5 Help page as well as the new "Request Help", "Suggest a Feature" and "Report a Bug" options.

My Inbox

- ▶ There is now a Casework Related Messages View available in My Inbox. This works the same way as the Possible Requests View. A "Casework Related" batch needs to be created for it to display by default in My Inbox and the Service Applications.
- ▶ The Outlook Messages Inbox view will now display and use the "Reply To" email address if embedded in the Outlook 365 email message. Both the "From" address and the "Reply To" address are displayed in the row and the Reading panel. The in-row action "Reply", which opens the "Add Outlook Message to IQ and Respond" dialog, will now auto-populate the search field at the top of the dialog with the "Reply To" address instead of the "From" address if one is used in the incoming email message. Note that IQ5 will only use the first "Reply To" email address if there is more than one.
- ▶ A new "Limit Access To" is now available in the "Configure Shared Outlook Inboxes" dialog. This allows users with Admin Lock #380 Granted, to select which Users and/or Groups should have access to the shared Outlook email account.

Contacts

- ▶ The following changes were made to make searching for Contacts with Organizations easier:

- Organization search field moved to more prominent location in Contact Search Pages.
- Three new organization related filters available in Contact lists (Has Preferred Organization, Has Non-Preferred Organization, & Organization)
- Type-ahead searches in Contacts now supports Organization names.
- Type-ahead searches work for organization in the Find or Add dialog modal.

Messages

- ▶ Added a search icon next to the letter name field in the Edit Message record dialog for the function to search letter text.
- ▶ All seven of the Messages text search options are now available in a single "Search For Text In" line. This allows the user to perform a single search to find keywords in both Incoming Attachments and Comments.

My Open Messages *Find*

Message Characteristics

Outreach Messages ☒ Include ☐ Exclude

Search for Text In

☐ Incoming Attachment ☐ Comments ☐ Outgoing Copy

☐ Batch Description ☐ Fillins ☐ Form Letter ☐ Custom Letter

Search for Text In

Status

Assigned User

Date In

From

To

Search [Advanced](#)

- ▶ In the Messages grid, 'Color' has been added as a 'Change' multi-row action, enabling users to mass update the Color assigned to selected Message records.

Services

- ▶ The "Customize" button has been added to the "Send Email" dialog in the Summary's Service Reading Pane, enabling users to customize both approved Form Letters with Fill-ins and regular Form Letters.

- The "Messages" tab is now available in the Service Reading Pane, displaying all attached Service-related Messages by most recent first and their statuses.

- Service-related Messages can now be easily removed from a service by using the detach icon in the "Messages" tab in the Reading Pane.

- The Contacts Tab is now available within a service. Click to the tab to review, detach and access contacts attached to the Service. Agency Contacts can also be attached from this tab.

- ▶ The "Related Services" tab is now available in the Service Reading Pane, allowing users to view a list of Services attached.

OPEN Casework - SOCIAL SECURITY ADM for Mr. Drew Quorum

Created 3/20/2025 2:43:25 PM by [redacted]

[Summary](#)
[Messages](#)
[Contacts](#)
[Attachments](#)
[Related Services](#)
[Logs](#)

Related Services: [1 Services](#)

[OPEN Casework](#)

Status: Open
 Opened: 3/20/2025
 Assigned: Queued: [redacted]

- ▶ The following enhancements were made to the Activity in the Service Reading pane:
 - Renamed the "Add Message" tab to "Send Email" and updated the "To" field to include a popup list of primary email addresses associated with Primary and Agency Contacts.
 - Added a "Follow Up" action in the Service Note for completed outgoing email messages. When 'Follow Up' is selected, IQ5 will open the Send Email tab and auto populate the To with the recipient email address and the Subject from the original outgoing message along with a copy of the original outgoing email in the customized message.

OPEN Casework - Active for [redacted]

Created 3/24/2025 10:18:55 AM by [redacted]

[Summary](#)
[Messages](#)
[Contacts](#)
[Attachments](#)
[Logs](#)

Detail Activity Data
 Passport Case
 Codes: [redacted]
 DOS-Department of State

Primary Contact [redacted] [Other Contacts](#)

Attachments

Library Files

Activity Send Email Discuss

Search...
☒ All ☐ Message ☐ Notes ☐ Attachments

Completed E-Mail custom letter to [redacted] on 03/24/2025 [Display](#) [Follow Up](#)

- ▶ Added a "Reply" action for a Service Activity note for an open incoming email message (i.e. Incoming Method is IMAIL) and no letter assigned.

Activity Send Email Discuss

☒ All ☐ Message ☐ Notes ☐ Attachments

Open E-Mail New Letter Name (copy 1) v.1 to David Haring - Approved [Display](#)
 12/4/2023 - 12:10 PM

Open E-Mail no response to [redacted] - Approved [Reply](#)

Events

- ▶ External email addresses can now be entered/included for meeting invites for IQ5 Events.