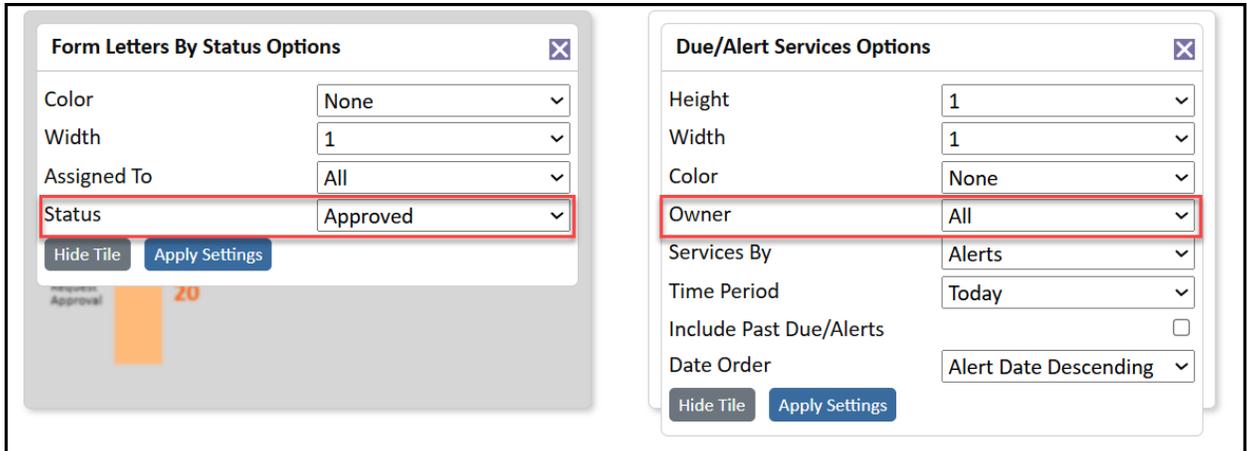


IQ5 New Features Version 1.7

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.



- ▶ 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.

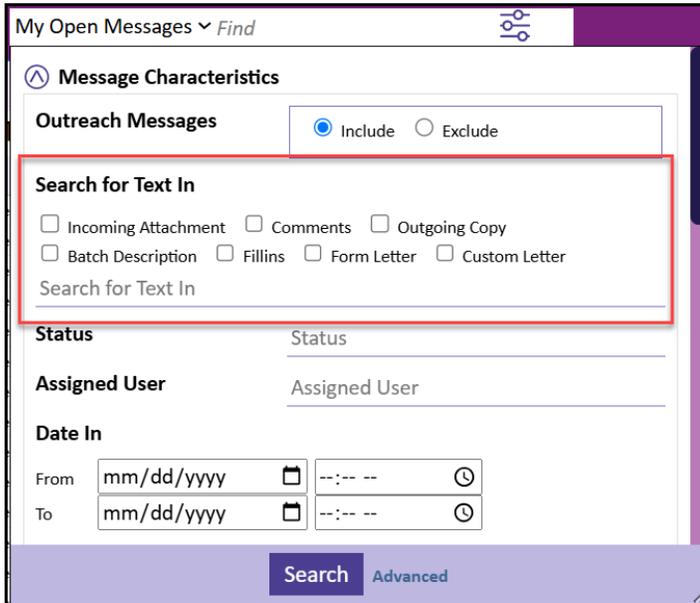
Contacts

- ▶ 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.

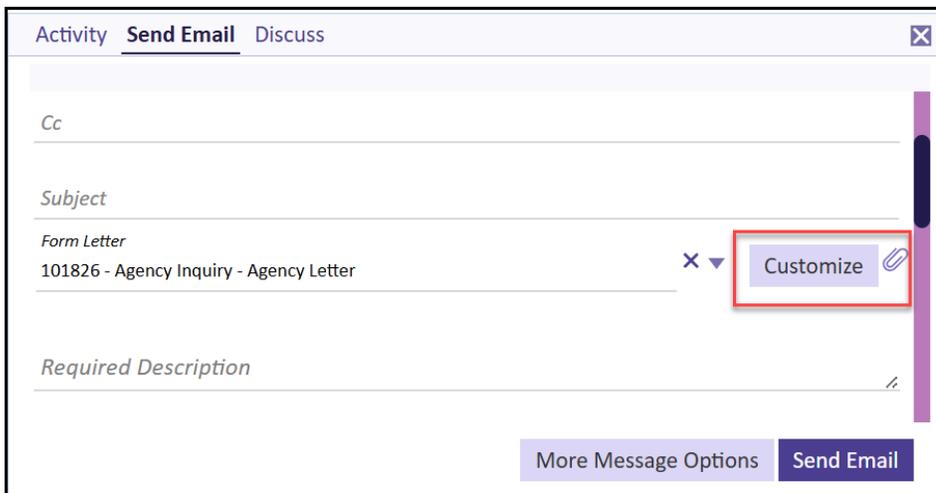
- ▶ All seven of the Messages text search options are now available in a single "Search For Text In" line. This allows the user to perform a single search to find keywords in both Incoming Attachments and Comments.



- ▶ 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.

OPEN Casework - SOCIAL SECURITY ADM for Mr. Drew Quorum

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

Summary **Messages** Contacts Attachments Logs

Messages: 1 Total 1 Open

3/21/2025 - 10:55 AM [Open E-Mail](#) custom letter to Robert Forrester - Approved [Display](#)

Detach Message

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

OPEN Casework - SOCIAL SECURITY ADM for Mr. Drew Quorum

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

Summary **Messages** Contacts Attachments Logs

Messages: 1 Total 1 Open

3/21/2025 - 10:55 AM [Open E-Mail](#) custom letter to Robert Forrester - Approved [Display](#)

Detach Message

- ▶ 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.

OPEN Casework - DEPT OF STATE for Ellen Quorum

Created 3/5/2025 10:05:38 AM by [redacted]

Summary Messages **Contacts** Attachments Related Services Logs

Attached Contacts Agency Contacts

All Attached Contacts (5)

Primary Contact

Ellen Quorum
c/o Sam Smith 12134 Monument dr., Fairfax, VA
ellenoq@fakemail.com, (123) 456-7890 (C)

ID: 7384030
Messages Open: 1 Closed: 0
Services Open: 2 Closed: 0

Other Contacts

Carrie Finckhough
Consular Officer, Department of State, 62028 Rayburn House Office Building, U.S. House of Representatives, Washington, WA 20515-0001
carrief@fakemail.com, Phone: (202) 226-4641 (B)

ID: 7117929
Messages Open: 10 Closed: 104
Services Open: 18 Closed: 92

- ▶ 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]

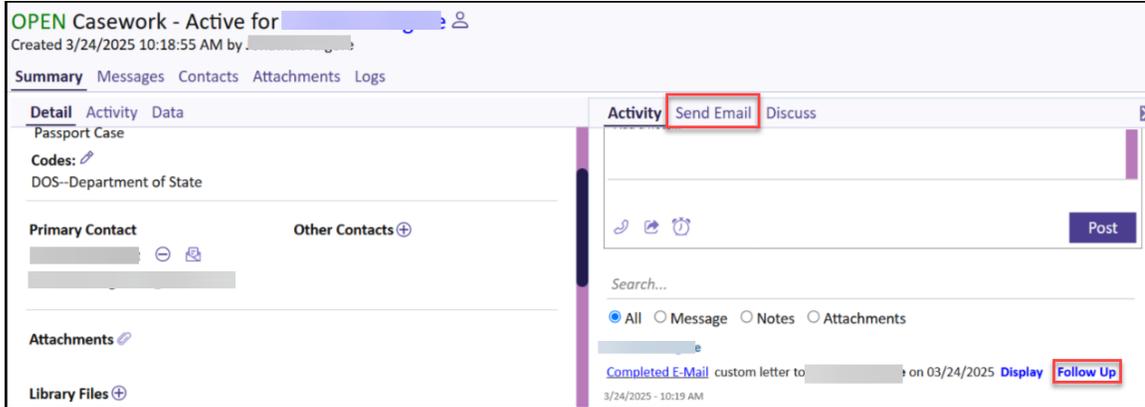
Summary Messages Contacts Attachments **Related Services** Logs

Related Services: 1 Services

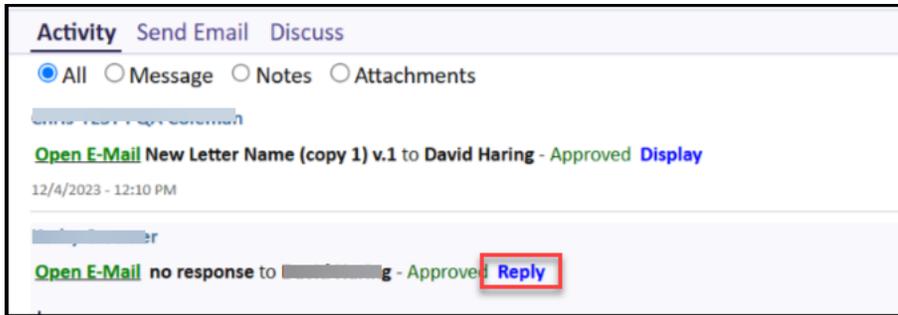
OPEN Casework Status: Open
Opened: 3/20/2025
Assigned: Queued: [redacted]

- ▶ 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.



- ▶ 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.



Library

- ▶ The following requested OneDrive related items have been made in the Library module:
 - "All OneDrive Form Letters" view that will list all available OneDrive files.
 - The check in/out process has been revised so that when checking out a file, the server will attempt to delete any stale versions of the file on OneDrive if they still exist. Note: It is still possible the file will get blocked if the file continues to be locked due to someone editing it.
 - When a form letter is checked out to OneDrive, the "OneDrive" tab, in the Reading pane, displays the file's version history as provided by OneDrive (i.e. date of the new version and the user who performed the change).

Events

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