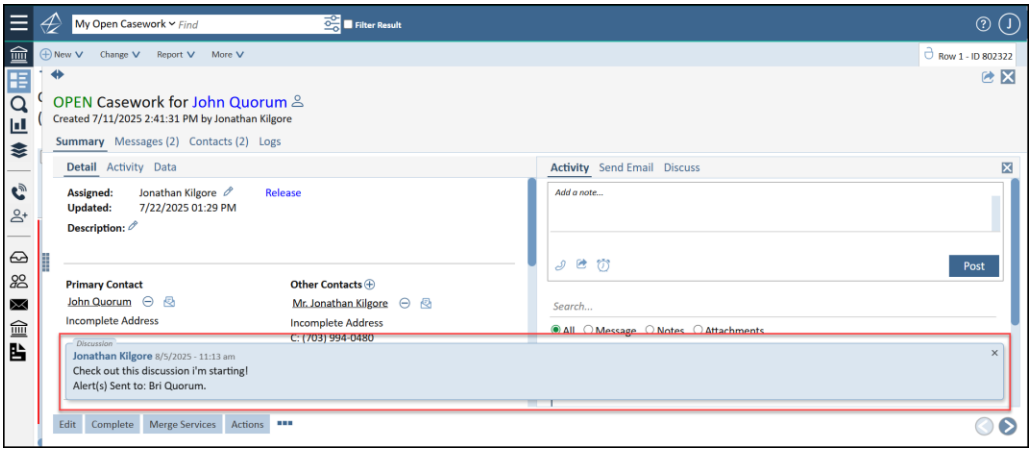
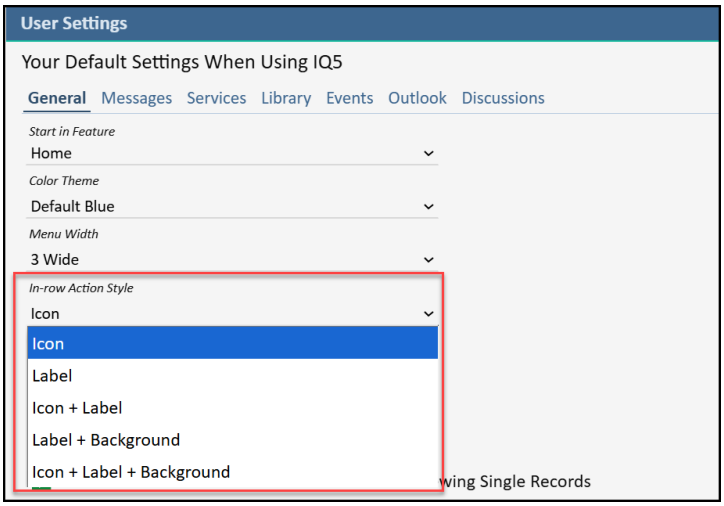
IQ5 New Features Version 1.8

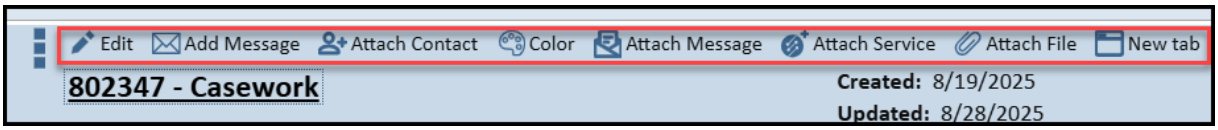
General/Home Page

- A new "Discussions" tab has been added to the IQ5 User Settings and contains "Show discussion notifications on other tabs of applicable records". When this new setting is selected, IQ5 will display the first 100 characters of the most recent Discussion text in a light blue popup in the record's Reading panel with an x to close the popup.



- A New User Setting has been added to the General tab: In Row Action Style. This user setting will change the In Row actions from being just icons to either, Labels (text), Icon & Labels, Label and Background, or Icon+Label+Background.





- The breadcrumb/back arrow stack has been enhanced. A right-click on the back arrow will display your breadcrumb stack (if you've navigated through a number of clicks). A normal click on the back arrow will take you back to the last record viewed. If you navigate back to the Home Page then the breadcrumbs will reset.

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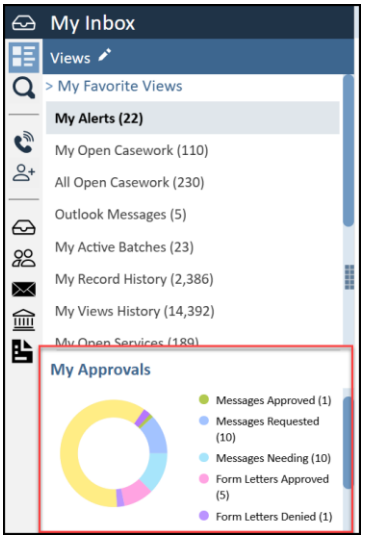
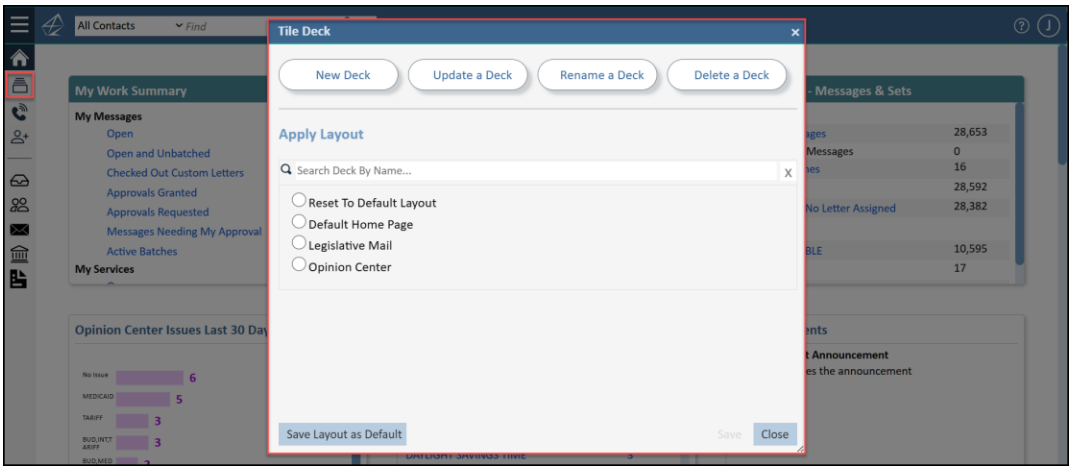
- Users can now add tiles to the Views panel in each IQ5 module by clicking the pencil icon and selecting “Add Tiles”. Once a tile is selected, it will appear in the bottom left section of the panel.



- The "My Approvals" tile is now available on IQ5 Homepage, allowing users to view approval statuses for both Messages and Form Letters in a pie chart and a list of items. The Tile does not include any filters, and if Approval has a zero count, it will not be displayed.
- Added the ability to configure multiple Tile Decks and a Customer specific default Home Page.



- Users can right-click the applications under the hamburger menu and Log Call to open the menus in a new tab.
- New Filters available by application (to add new filters, click on the Filter icon to show Filters, then click on the icon next to Filter List).
    - New “Read” filter available in “My Alerts” in the My Inbox application
    - New “Batched by” filter available in Messages
    - New “Batch Code” filter available in Messages
    - New “Created by” filter available in Messages
    - New “Entered Date” and “District” filters available in Sets
    - New “Service Role” Filter added in Services

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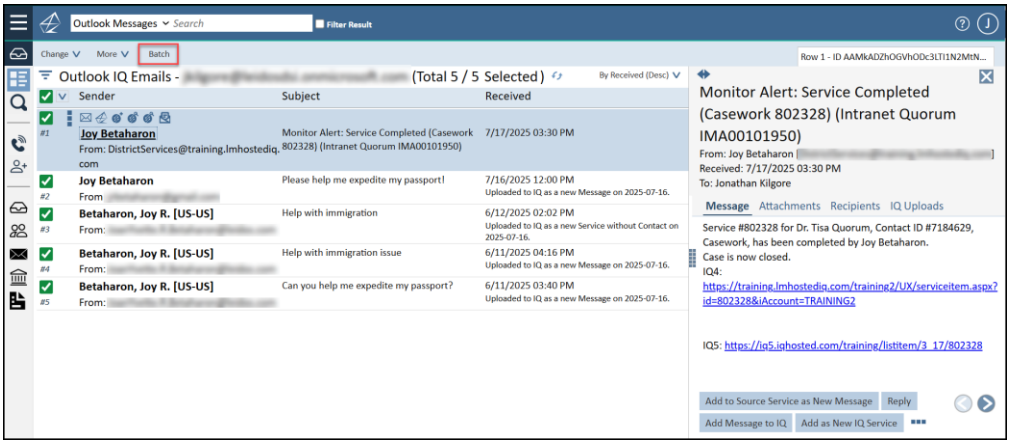
- New “Opened Year” and “Closed Year” filters available in Services
- New “Color” filter available in Services

My Inbox

- A new multi-row Batch action is now available in Outlook Messages under My Inbox. This opens the "Message Batch Update" dialog where the user can select an existing batch from "All Active Unlocked" , "Recently Used Batches" or create a new Batch.
  - This will create new Message records and apply the Batch Response Rule to the new Message records if the selected/newly created Batch contains a Batch Response Rule. The email address is used to locate a Contact record using the following "rules"...
    - - If only one Contact has the matching email address use it.
    - - If multiple Contacts have the matching email address, select the most recently used.
    - - If no match then create a new Contact record.



- Alerts can now be "Mark as Read" and "Mark as Unread" either individually or multiples and a highlight line now appears on the left side of unread alerts in the My Alerts List view to help draw attention to them. Also, when an alert has been selected for more than three seconds, selecting another alert will automatically mark the preceding one as read. The only exception to this is when it’s the initial alert selected when loading the My Alerts, to prevent accidentally marking that one as read.

Contacts

- Users can add an opinion message record from the IQ5 Contacts grid. There is a second envelope icon in-row action button called "Log Call" which opens a message dialog with preloaded data identifying it as an opinion.

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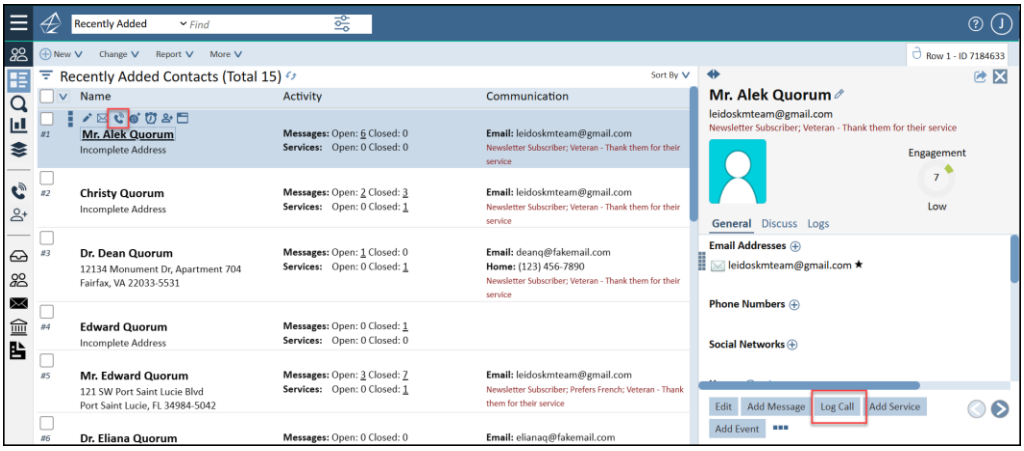
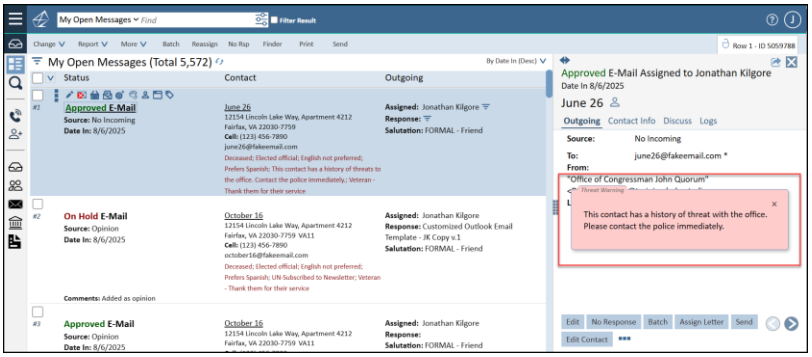
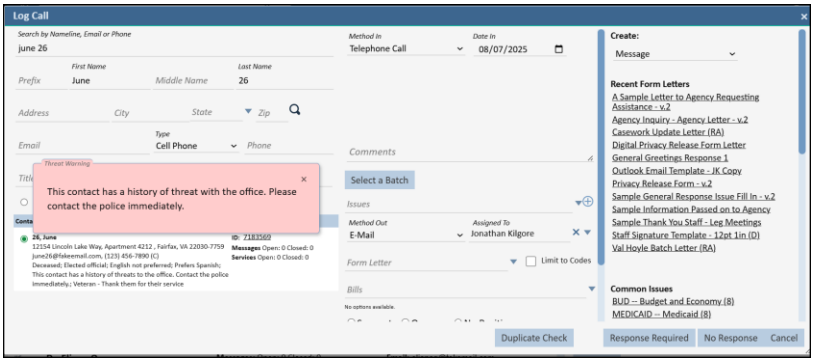


Messages

- When adding a new or editing an existing Message record for a Contact with an "Affiliation Code for Threat", IQ5 now displays the Threat Warning Message entered in the IQ4 System Settings (i.e. "Please contact the USCP immediately."). The threat warning alert is also displayed in a red popup in the Messages Reading pane when navigating to a Message record associated with a Contact with an "Affiliation Code for Threat".
- New In Row Action, “Assign Letter” has been added represented by a Paper icon. This will allow users to easily assign a Form Letter to an individual Message.
- The Threat Warning Message popup now appears in IQ5 Log Call when the user clicks the radio button for a Contact record with the Threat Affiliation Code.





- A new "Batch Code" field has been added to the Edit Batch record dialog in IQ5 along with a new Batch Code table. This allows the user to create and assign a code to a Batch for the purpose of

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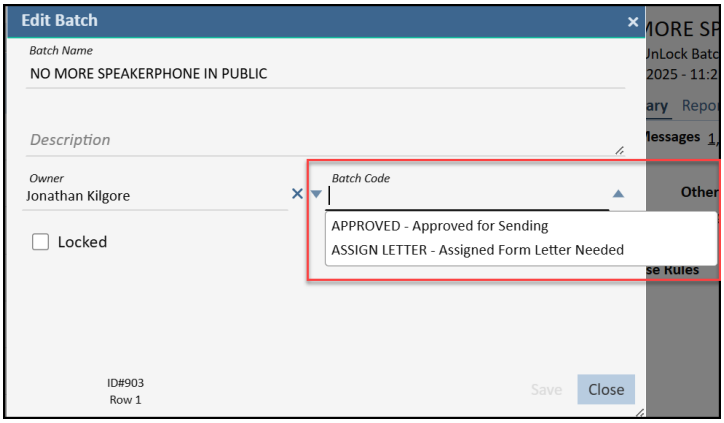
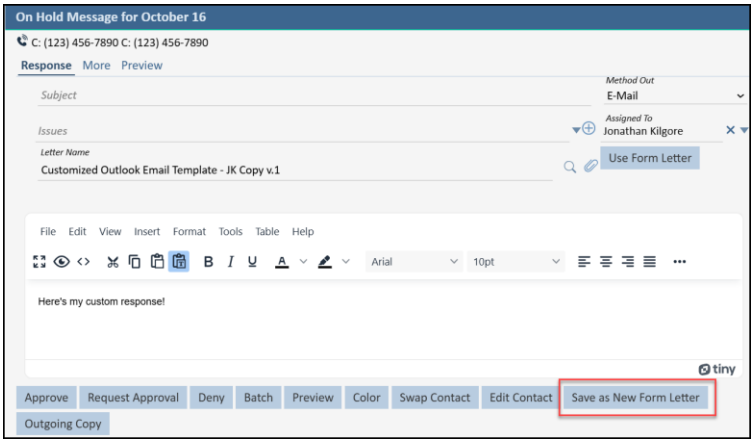
tracking the current Status of the Batch (i.e. Assign Letter, Approved for Sending, etc.). In addition, the Batch Code can be added or removed to multiple selected Batch records and used to filter batches.



- "Save as New Form Letter" has been added as a new in-row action and as a button in the Message edit dialog to save a custom message reply as a form letter.



Services

- An Add New Message icon is now available next to attached contacts on the Contacts Tab of Service Records, allowing users to easily craft a message to a contact from the Service Reading Pane.

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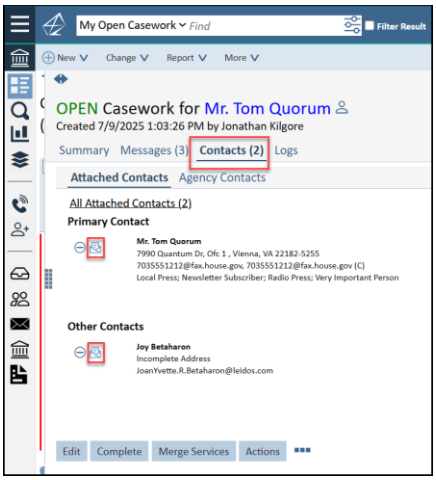
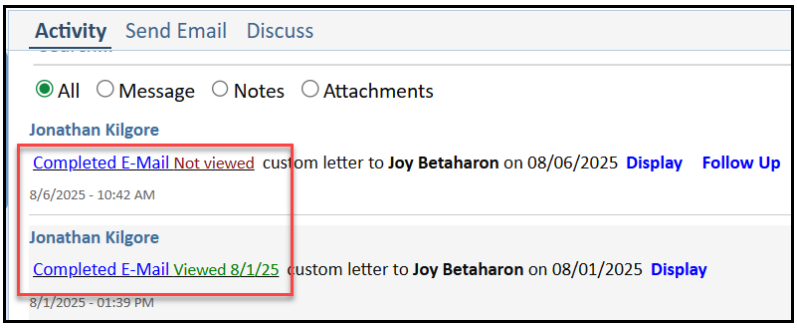
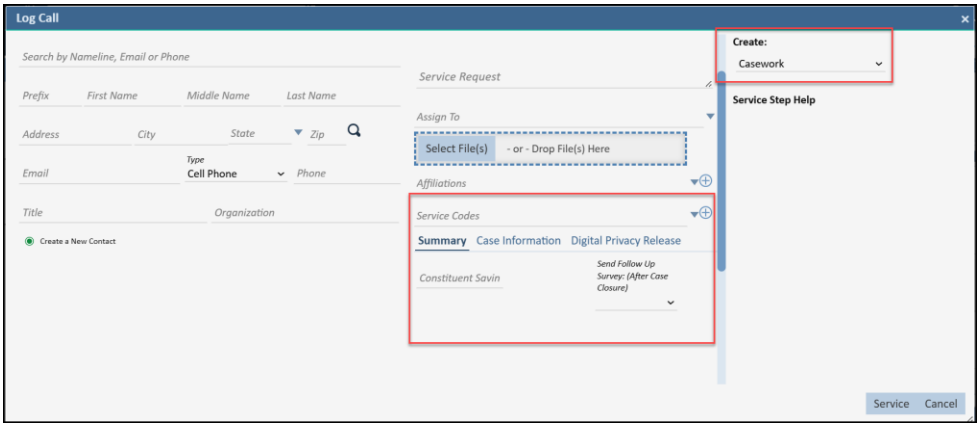


- The green Viewed Date and red Not Viewed are now displayed for the Outgoing Service-related Message records in the Activity section in the Service Reading panel



- When selecting Create Service in the IQ5 Log Call, the Service Code field and selected UDFs are now available.



- The Send Information Copy dialog now has two tabs: "Send Info Copy" and "Edit Future Info Copy". The "Send Info Copy" tab contains all of the fields/options available prior to IQ5 v1.8. Each time the user selects "Send Alert Later" on the "Send Info Copy" tab and enters a future date and time, IQ5 creates a "SendDelayedAlert:" background job with the Service record ID and Subject. The delayed info copies can be edited or deleted in the "Edit Future Info Copy" tab. In addition, the Info Copy icon turns red in color with a tool tip "Info Copy: #" where # is the number of delayed information copies for the Service record.

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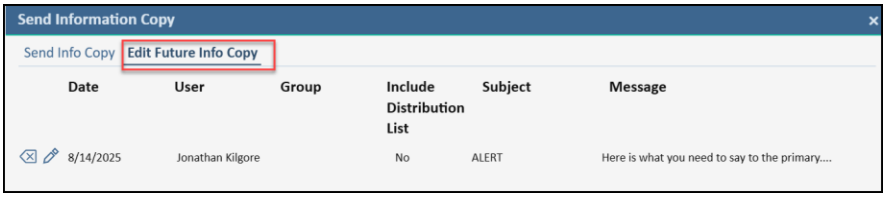
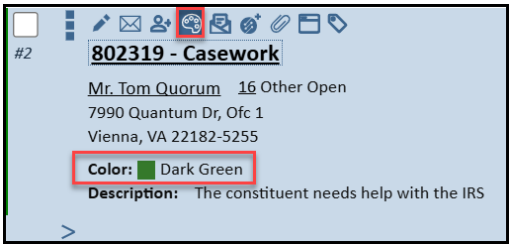


- The IQ5 Service User Settings has been enhanced to include a setting identifying Service Preferred Templates so users no longer need to rely on IQ4 for that setting.
- Added the ability to apply a color for selected Service records (like in Messages). This includes in-row and multi-row actions and a Color Filter.



Outreach

- The "Logs" tab is now available on the eNewsletter Reading Pane, which tracks changes made to newsletters. Each Revision option is now hyperlinked allowing users to view and revert to previous versions using the "Promotes This Revision" button.

- The "Full Editor" button is now available in the eNewsletter Content Editor dialog which enables users to update full content at the same time. This enhancement also enables full screen expansion.

Events

- Users are now able to create messages directly from the Event record page, which makes communication easier and quicker.

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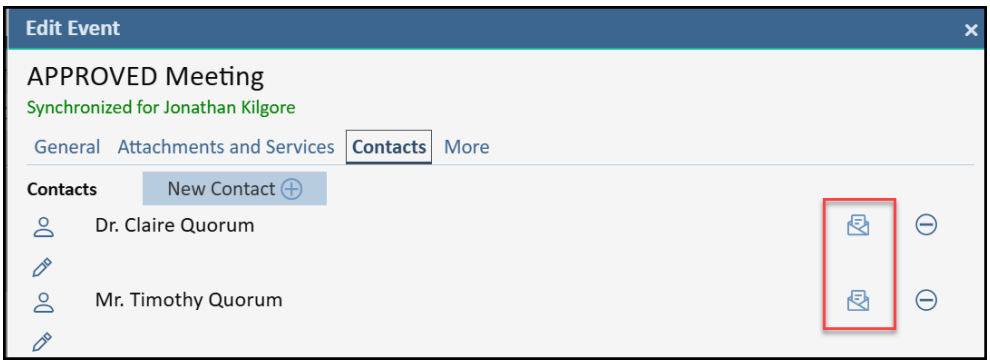

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