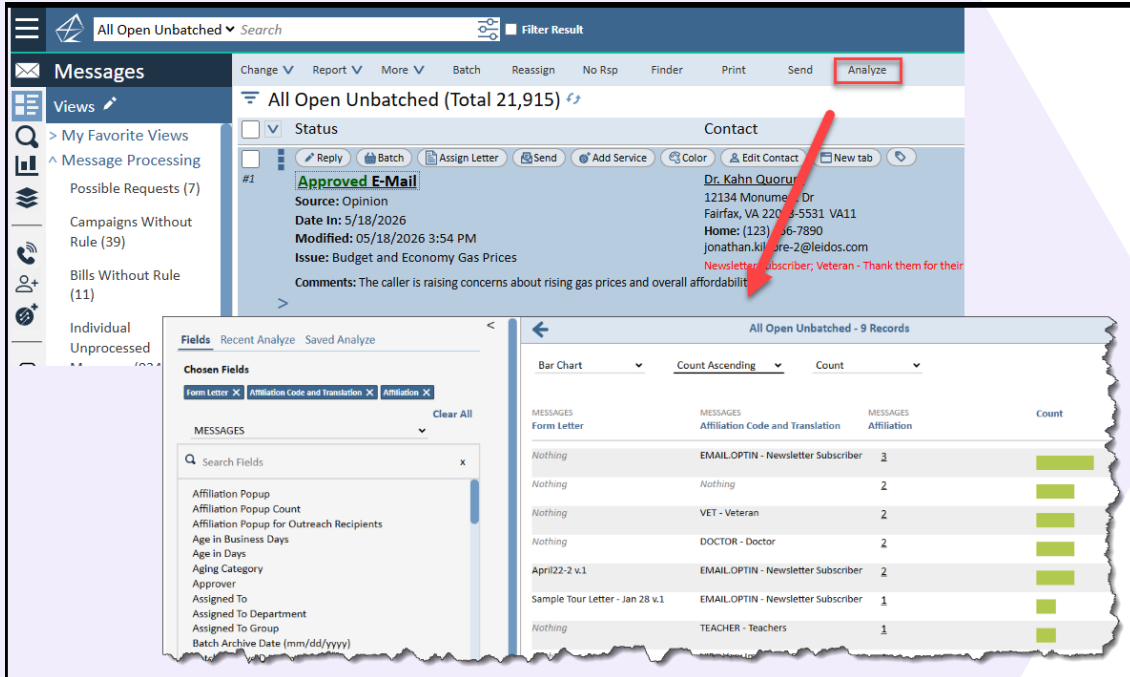


## IQ5 New Features Version 1.10

### General/Home Page

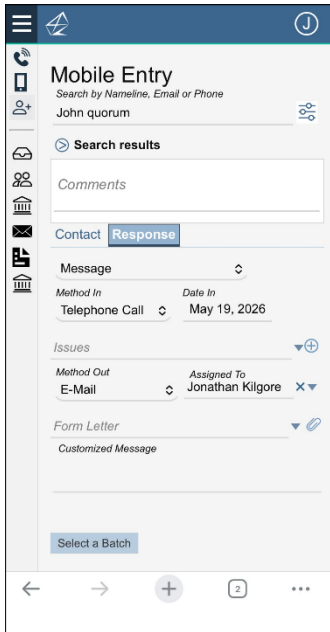
- ▶ View Advanced Analyze is now available within Contacts, Messages and Services and has replaced the old Analyze option within the Report drop down. This will allow users to search and select fields to dynamically build grouped analysis results. The analysis will display as a bar graph by default and can be saved and exported via MS Word/Excel.



The screenshot shows the 'Messages' view in the Leidos IQ5 system. The 'Analyze' button is highlighted in the top right corner. Below the main view, a 'Fields' dialog box is open, showing a list of fields to be analyzed. To the right, a 'Bar Chart' view displays a table of analysis results.

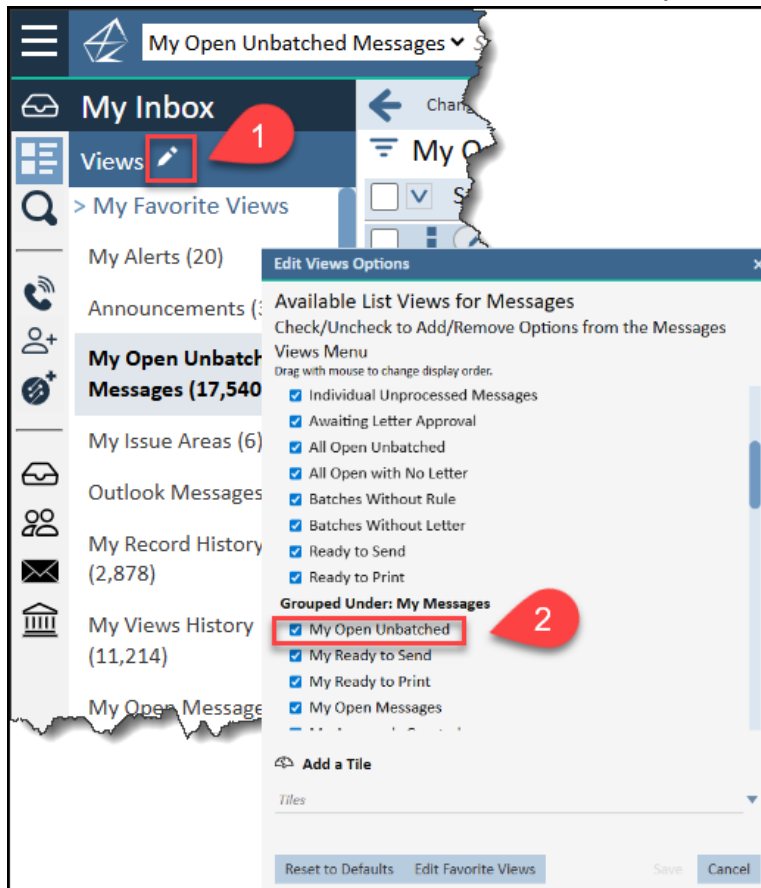
Count Ascending	Count
MESSAGES Form Letter	
Nothing	
MESSAGES Affiliation Code and Translation	
Nothing	
EMAIL.OPTIN - Newsletter Subscriber	3
Nothing	
Nothing	
VET - Veteran	2
Nothing	
Nothing	
DOCTOR - Doctor	2
Nothing	
April22-2 v.1	2
Nothing	
EMAIL.OPTIN - Newsletter Subscriber	2
Nothing	
Sample Tour Letter - Jan 28 v.1	1
Nothing	
EMAIL.OPTIN - Newsletter Subscriber	1
Nothing	
TEACHER - Teachers	1

- ▶ Users can expand or collapse records using the Expand Rows/Collapse rows option in the More dropdown menu.
- ▶ The Mobile Entry screen can now be launched in its own tab by right clicking on the icon on the left action bar. Now mobile users can launch directly to the mobile entry screen after bookmarking that link.



- ▶ Users can now Share their favorite reports with others in the office using the new “Share” button in the reading pane of IQ5 Reports pages.
- ▶ eNewsletter Templates can now be accessed within the My Work Summary tile under the My Form Letters/Files section.

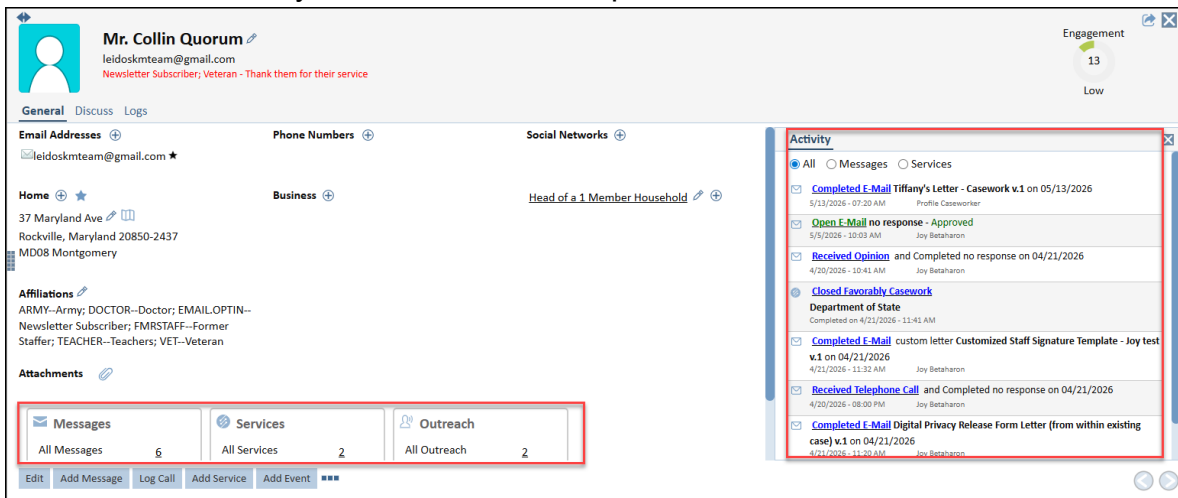
- ▶ The "My Open Unbatched Messages" view is now available in the My Inbox List Views and can be added via the "Edit Views Options" dialog.



## Contacts

- ▶ Search for and attach existing Events to Contact records right from the Contact record itself with the new Attach Existing Event button.
- ▶ The Contact Record reading pane has been updated with two new sections: A General Tab and an Activity Session. The General Tab will contain Tiles that show Message, Service, Outreach, Events and Boards activity for a Contact, while the Activity section will show all Messages and Services associated with

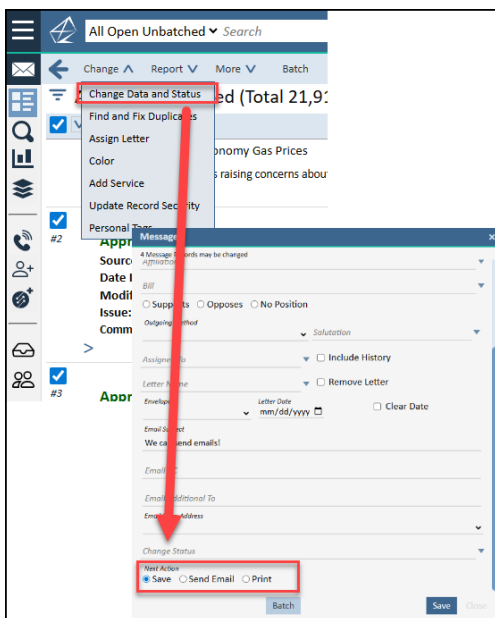
the contact, sorted by most recent at the top.



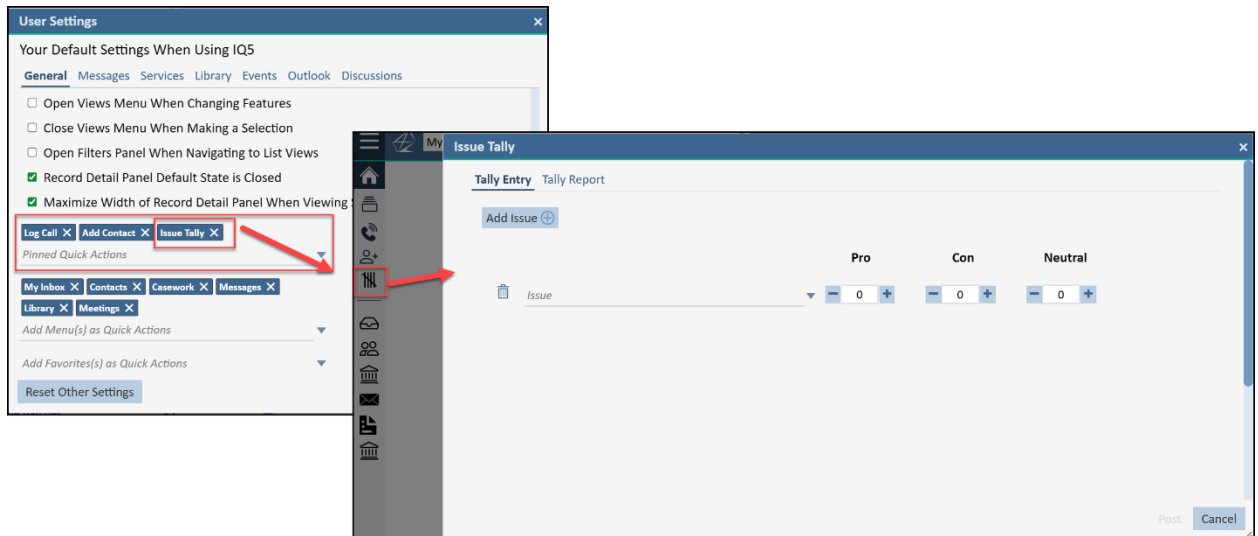
- ▶ A new filter, Future District, is now available within Contacts and Services to assist Customers with redistricting.

## Messages

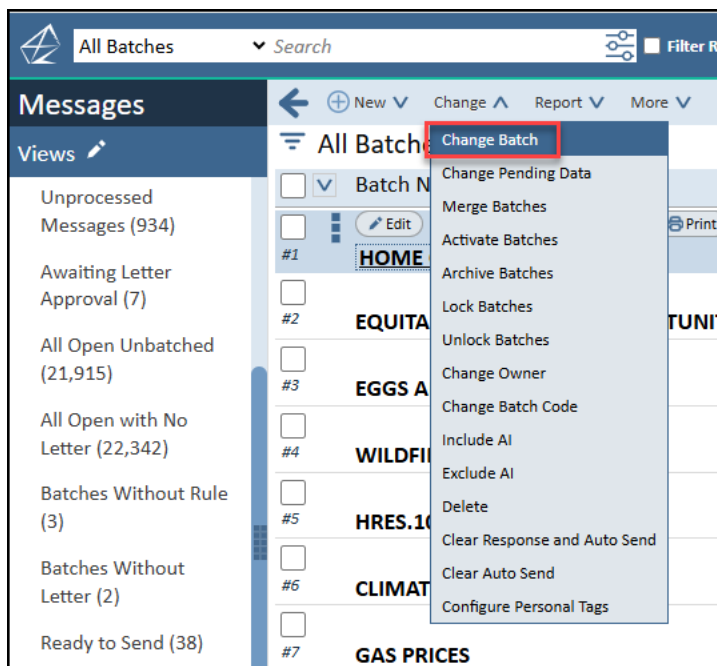
- ▶ The ability to Print and/or Send Email has been added to the Change Data and Status Screen.



- ▶ Issue Tally is now available in IQ5. Add it as a new Quick Action in User Settings under the General tab.



- ▶ The ability to Send emails for multiple selected Batches is now available.
- ▶ The Aging Report for Messages is now available on the Messages Reports list page, including options to configure the report, email scheduling options, and execution history tracking.
- ▶ A new action, Change Batch under the Change dropdown when viewing Batch lists has been added. This allows users to remove the batch from pending Message records or move the pending Message records to a different Batch.

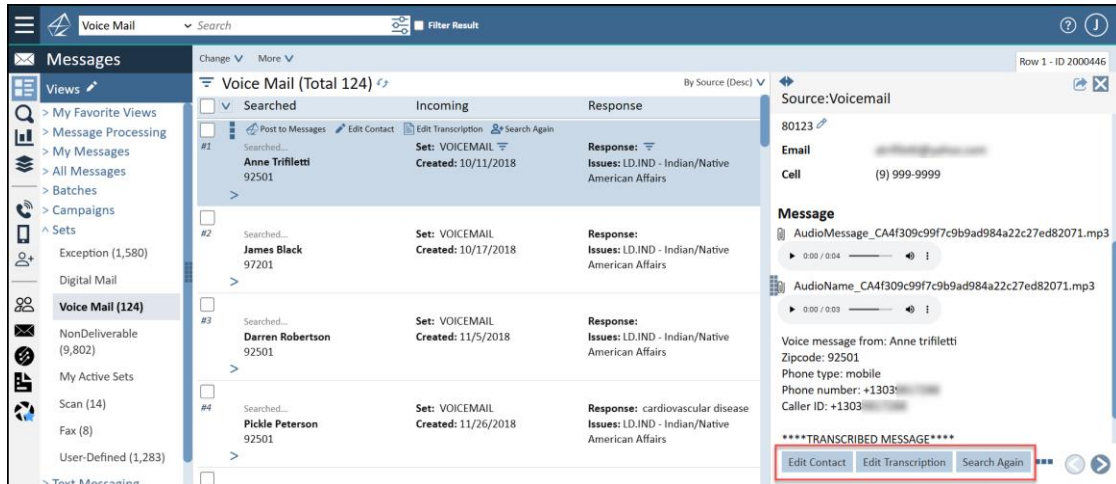


- ▶ The Summary tab in the Batches Reading pane now contains:
  - 1) Total count of associated Campaigns with a drill-down link to Campaign Grid
  - 2) List of Campaigns with a Batch icon next to each to allow Change/Remove of Batch Rule in Campaign.
  - 3) The IMA and/or Service Rule ID(s) like this...  
 IMA Message Rules: 1842  
 IMA Service Rules: 1954

The screenshot displays the 'All Active Batches' interface. The main table lists various batches with columns for Batch Name, Open, Total, Rule, and IMA Rule. The 'LOCAL ECONOMY ISSUES' batch is highlighted, showing 3,006 total messages and 1 total campaign. The right-hand pane provides a detailed view of this batch, including a summary of open and total messages, a list of campaigns (e.g., 'Tipping should not be mandatory!'), and other statistics like 'Completed' (3,006) and 'Response Rules'.

Batch Name	Open	Total	Rule	IMA Rule
#7 COVID SCHOOL OPENINGS	3	10	Yes	No
#8 TIK TOK CONCERNS	2	3	Yes	No
#9 ELECTRIC VEHICLES	1	1	Yes	No
#10 GUN CONTROL	1	1	Yes	No
#11 MASS MAILINGS PROFILE CASEWORKER	1	1	No	No
#12 MARCH COVID BATCH	1	27	No	No
#13 LOCAL ECONOMY ISSUES		3,006	Yes	No
#14 GOVT SHUTDOWN			Yes	No

- ▶ When viewing a Campaign, there is a new Variation Count column and sort option. In addition, the Unique Variations link, in the Variations panel, opens a list of Message records for the Unique Campaign Variations.
- ▶ The "Split Contacts" in-row action is now available for Built Mass Mailings, allowing users to split Mass Mailings into smaller groups.
- ▶ "Search Again" and "Edit Transcription" are now available as in-row action buttons/icons as well as buttons in the Voice Mail Set record Reading pane footer. Both of these, along with Edit Contact, open a dialog with the contents of the incoming voicemail email and a link to the converted .wav file (i.e. .mp3) and an audio player.



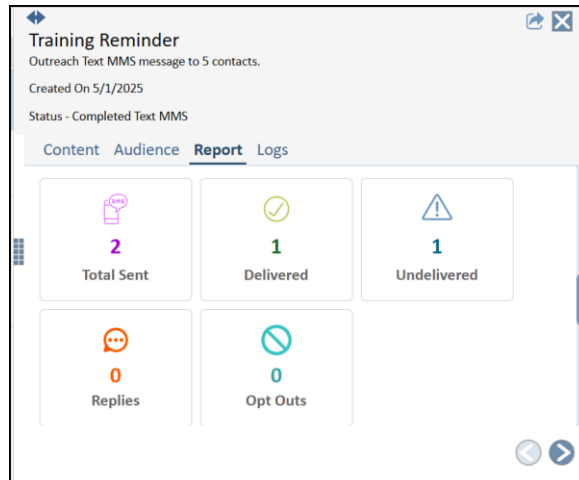
## Outreach

- ▶ Newsletter content in the Newsletter Wizard now auto-saves every 5 minutes when changes are made.
- ▶ The ability to include First Name and/or City in the Subject for an eNewsletter has been added to the IQ5 Outreach Wizard. Click the arrow icon next to the Subject field in the Content or Review step and select First Name and/or City. The user can also manually type [[firstname]] or [[city]] in the Subject field to include the merge code(s).



- ▶ Updates have been made to SMS text messaging in IQ5, including updates to the Report tab when viewing Mass Text messaging, the ability to search by the single character “Y” and “N”, and new in-row actions for pending text messages have been added, including:

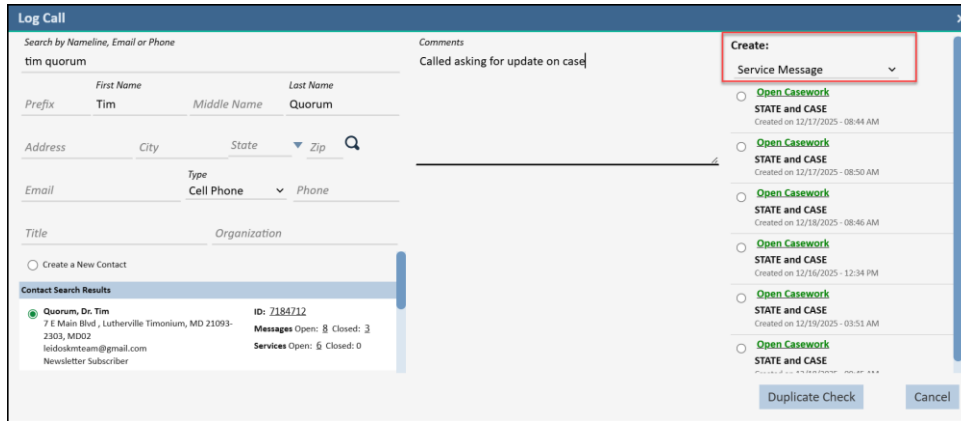
1. Search Contact
2. Reply
3. Assign
4. Quick Reply
5. Complete (No Response)
6. SMS Option (OptIn or OptOut)



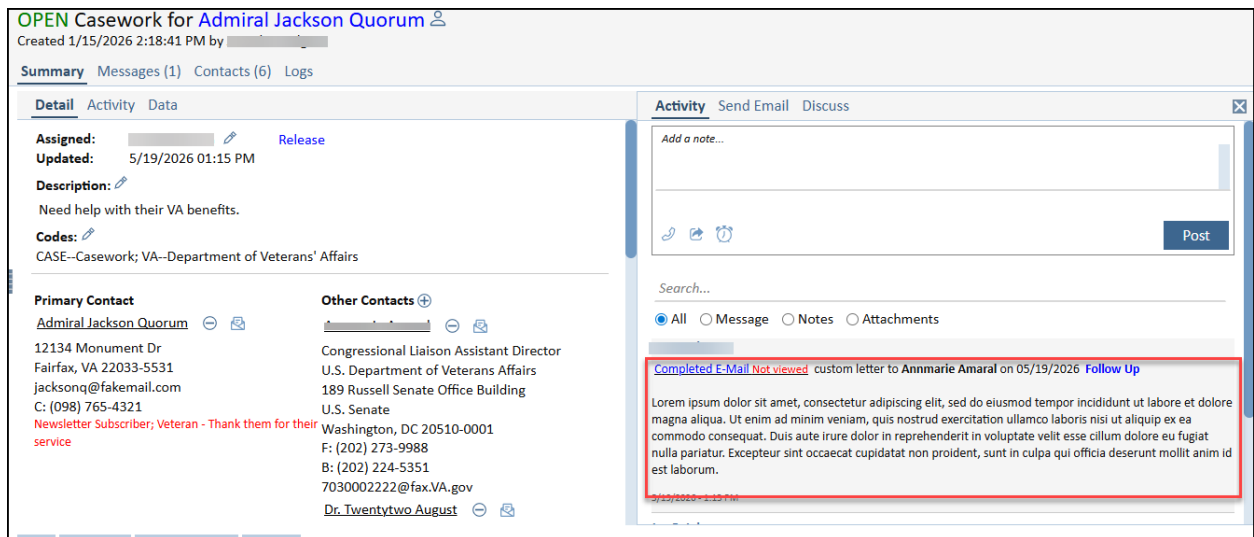
- ▶ Two buttons, "View Survey instapoll" and "View Related Survey" have been added to the bottom of the Metrics tab for eNewsletters sent with a survey.

## Services

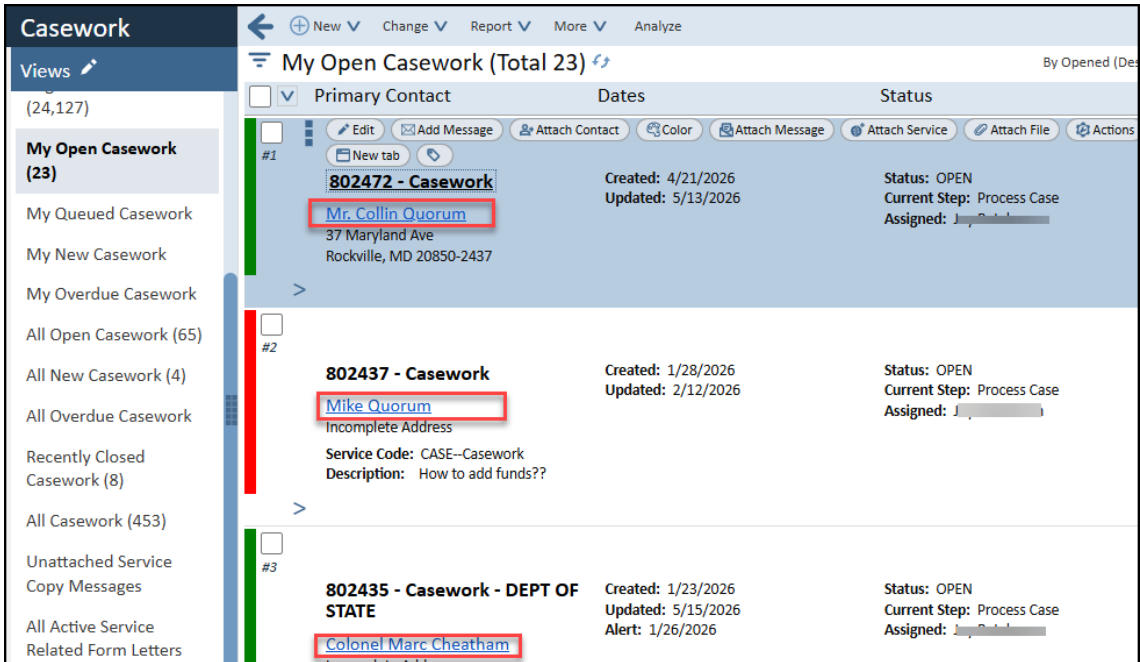
- ▶ The "Show Preferred Only" checkbox has been added for "Add as New IQ Service" under My Inbox -> Outlook Messages. This checkbox appears by default if the user has Preferred Service Templates selected in their IQ5 User Settings.
- ▶ The "Archivist Report" is now available under the Report drop-down menu in Services and Messages. This report allows users to download a comprehensive report that captures all the information inside the Service, including attachments. It can be run on individual records as well as on multiple selected records. When running the Archivist Report for multiple records in a grid, IQ creates a special service record that attaches the reports via a background job. When running the Archivist Report for an individual record, IQ downloads the report right away.
- ▶ The "Service Message" option is now available in the "Create" dropdown in the Log Call screen, making it easier to add Notes and Messages to Open Services.



- ▶ IQ5 now allows for Services to be sorted based on Color Rule. The order will be based on the position of the colors in the template. Talk to your IQ Consultant for assistance in getting this set up if your office is not currently using Color Rules.
- ▶ Users can now filter messages by the contact it was sent to/received from in the Activity Feed of Service Records. Click the Message radio button in the Activity feed and utilize the new "Filter by Contact" dropdown that appears.
- ▶ When sending an email using a custom message from the Send Email tab in Service Activity section, the message body is now displayed in the Activity section. Regular form letters remain unchanged.



- ▶ Primary Contact Names attached to Services now display in blue in a slightly larger text to make it easier to view in Service Grid Pages. The Other Open link also displays as blue text.



- ▶ There is a No Response button available now at the bottom of a Message Edit dialog. Users working in a Service Record can click the link to a Message in the Activity Feed which opens up the Message Edit dialog and then close out the Message with one other click (two clicks total).

## Library

- ▶ Users now have the ability to sort by "Total Count" in the list view for Form Letters.
- ▶ A new "Content only" radio button option is now available in the Form Letter Reading Pane, allowing users to view the form letter text in a larger preview that is easier to read without needing browser zoom.

