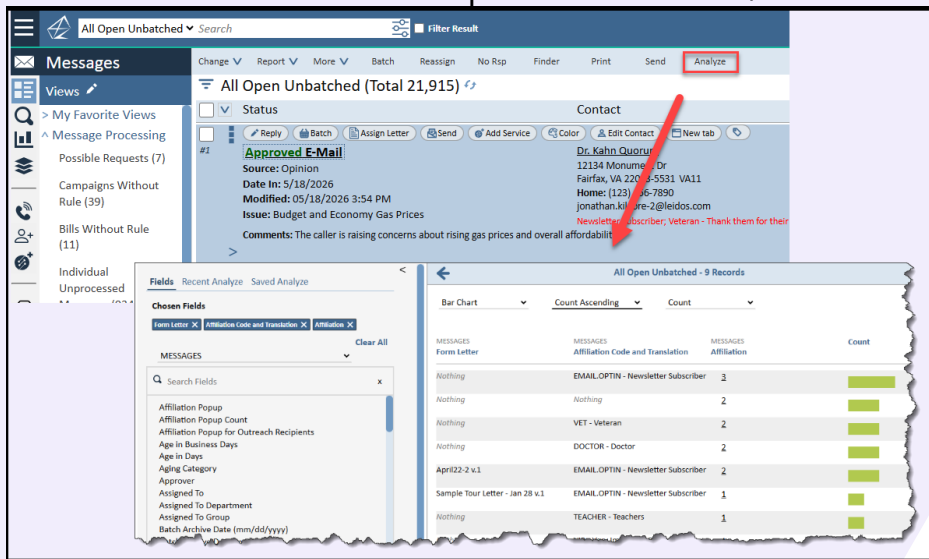
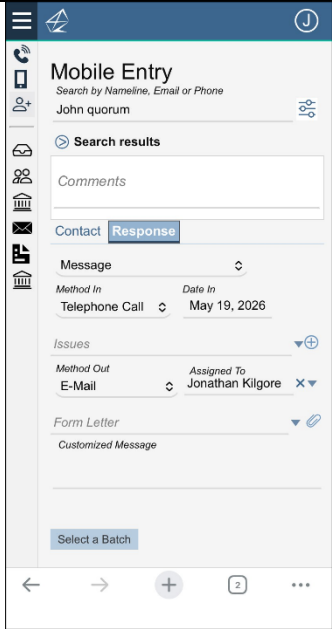
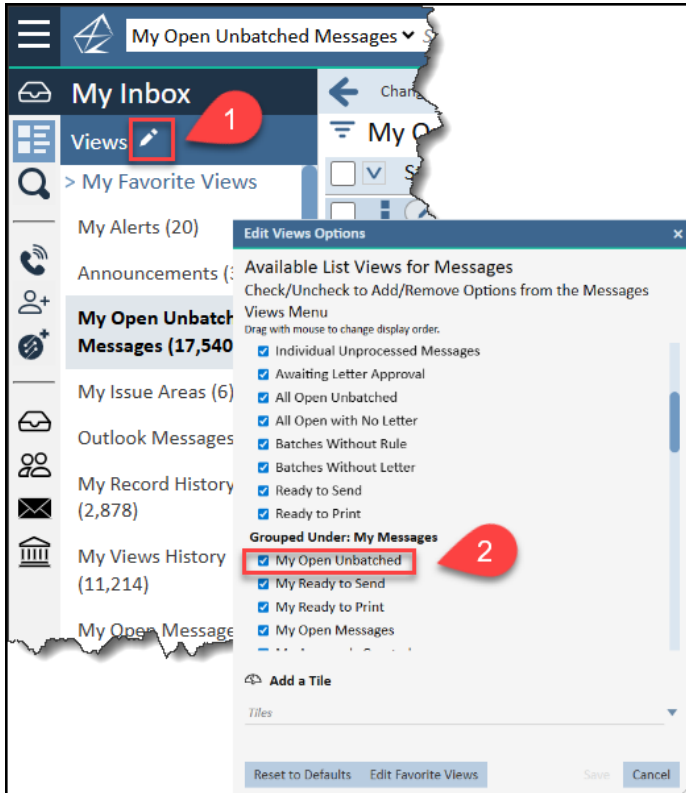
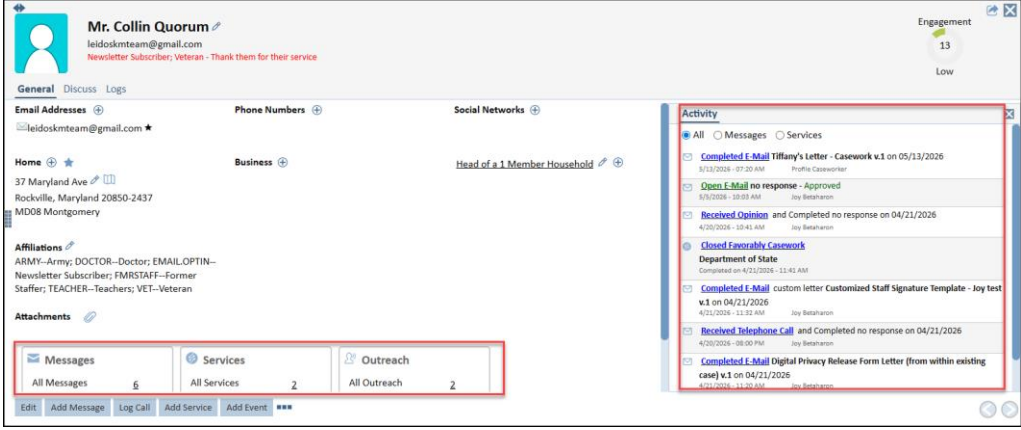
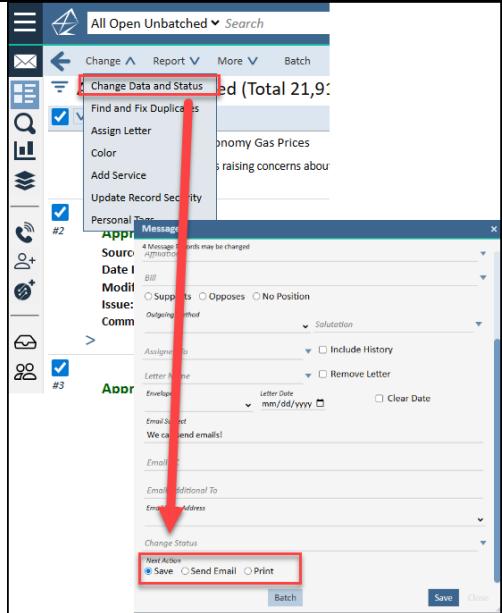
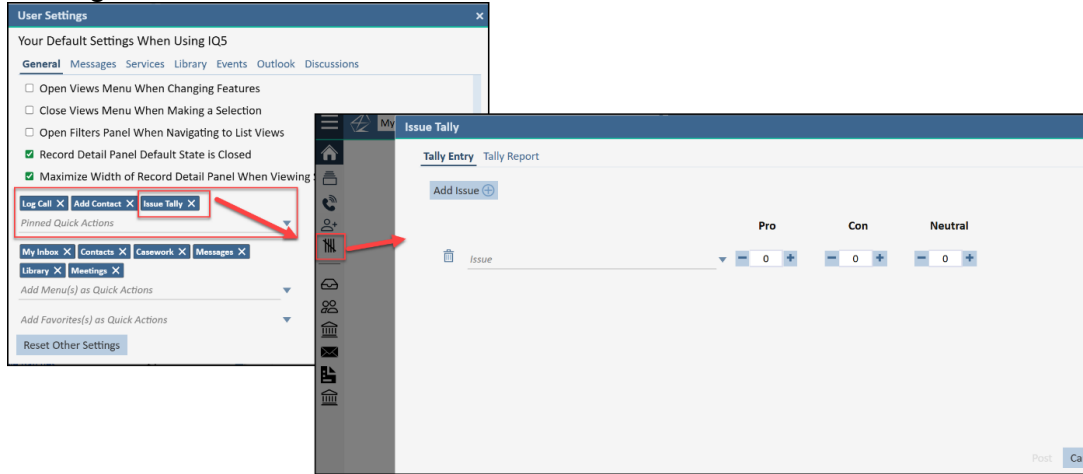


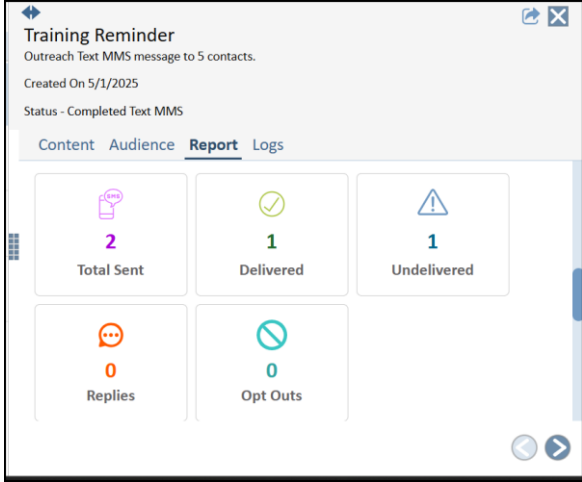
IQ5 New Features Version 1.10

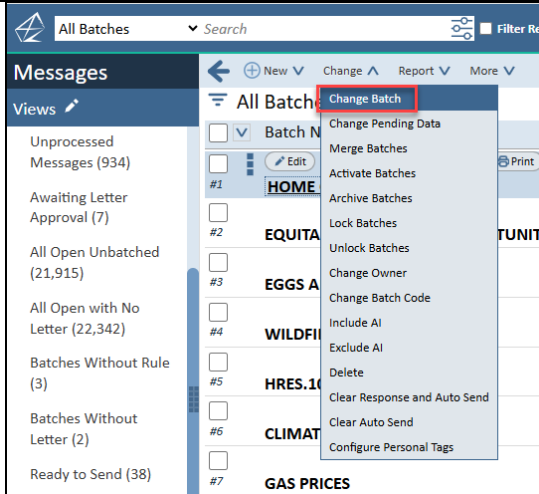
General/Home Page	
CR#	Feature Description
929608	Enhancement has been made to Record Security. Records set to access level "None" for users will no longer appear in their grid. Visibility of records will remain at all other access levels.
930047	Users can expand or collapse records using the Expand Rows/Collapse rows option in the More dropdown menu.
968905	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. 
978869	Existing IQ4 Select Processor Searches (CSB searches) can now be made easily accessible in the Search section of an application in IQ5 under Criteria Searches, by creating a copy of that search and renaming it slightly. Newly created CSB searches will automatically appear in IQ5.
980236	The "IQ_Login_Banner" feature is now available, introducing a configurable acknowledgement popup that appears after clicking the "Log in" button, displays message content, and requires user acknowledgment before accessing the application.
982369	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.
982915	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.

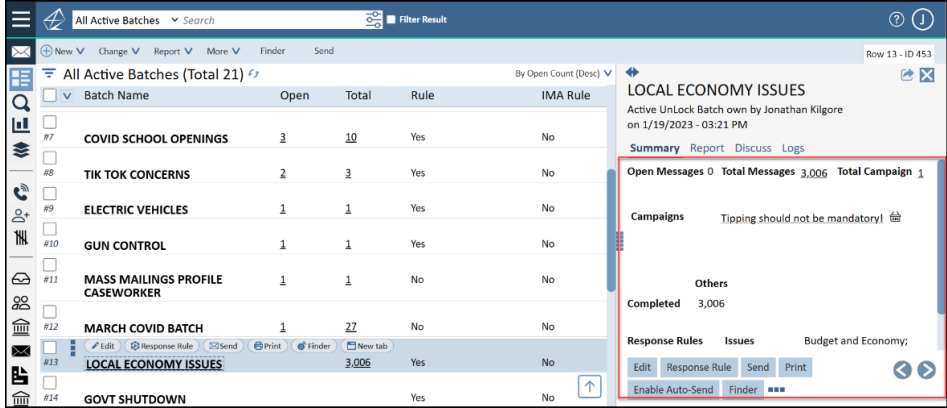
	
976082	eNewsletter Templates can now be accessed within the My Work Summary tile under the My Form Letters/Files section.
982848	The "My Open Unbatched Messages" view is now available in the My Inbox List Views and can be added via the "Edit Views Options" dialog. 

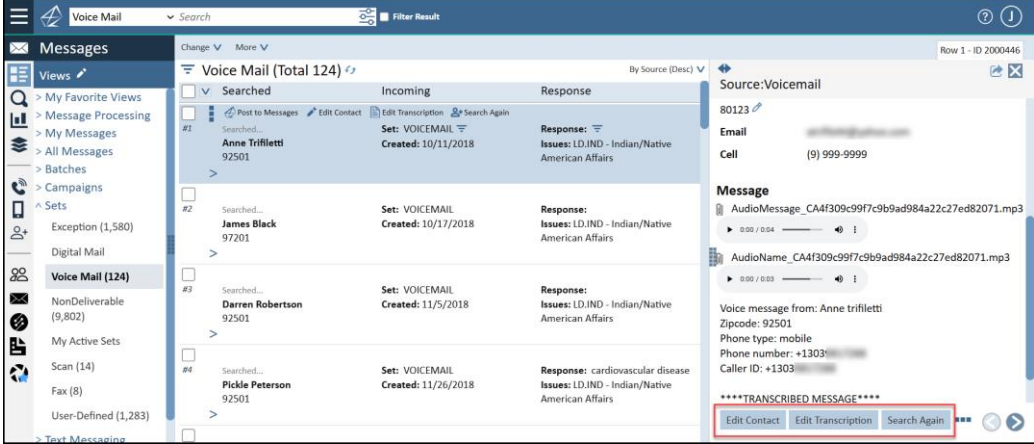
Contacts	
CR#	Feature Description
941856	The option to mass delete contact records is now available in IQ5. This action lives under the Change drop-down menu in the Contacts grid. Users have the option to delete contacts immediately or create a background job.
975226	The L2 Universe Composition field has been added to the Universe Information section in IQ.
977136	Search for and attach existing Events to Contact records right from the Contact record itself with the new Attach Existing Event button.
980066	The custom fields for a Contact record are now displayed at the bottom of the General tab in the Reading Pane.
980244	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. 
987793	A new filter, Future District, is now available within Contacts and Services to assist Customers with redistricting.
Messages	
CR#	Feature Description
63613	The ability to Print and/or Send Email has been added to the Change Data and Status Screen.

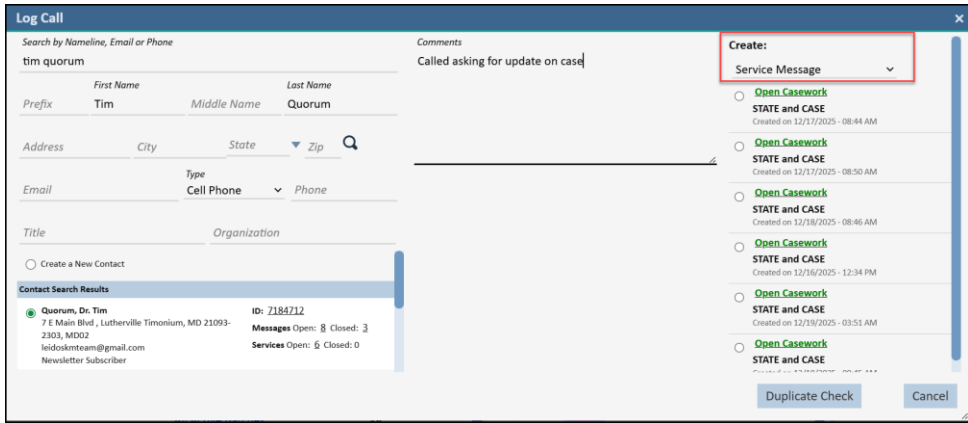
		
920054	The "Auto-Print" checkbox option is now available at the bottom of the 'Message Print Letter' dialog in Messages Module. When enabled, single message prints automatically download until logout, or a print error occurs.	
930696	Issue Tally is now available in IQ5. Add it as a new Quick Action in User Settings under the General tab. 	
947917	The ability to Send emails for multiple selected Batches is now available.	
971281	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.	
975233	The Batch actions (Edit, Response Rule, Send, Print, Finder, and New Tab) are now displayed directly in the grid rows instead of only under the ... menu.	

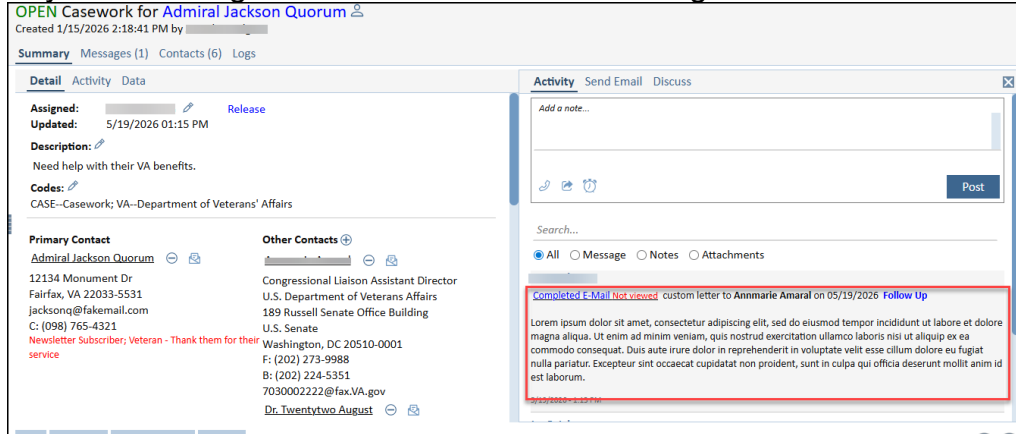
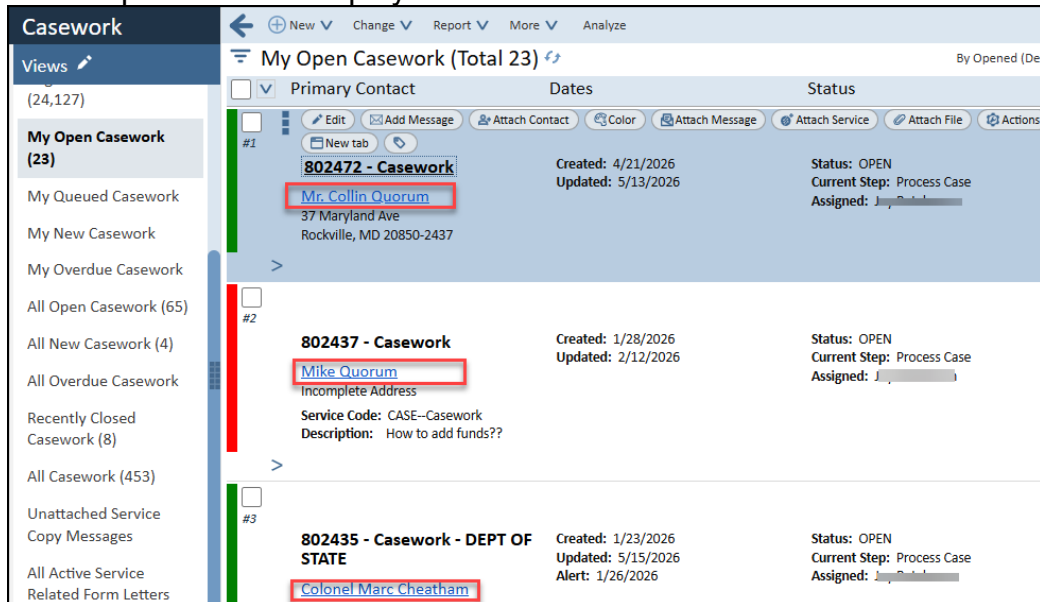
975240	Updates have been made to SMS text messaging in IQ5, including updates to the Report tab when viewing Mass Text messaging, the ability to search by the single character “Y” and “N”, and new in-row actions for pending text messages have been added, including: 1. Search Contact 2. Reply 3. Assign 4. Quick Reply 5. Complete (No Response) 6. SMS Option (OptIn or OptOut) 
975243	In the SCAN Set, Edit Transcription, Search Again and Edit Contact all contain a viewer with an expand and display toggle buttons. This allows the user to see the contents of the incoming file inside the dialog to make it easier to search for another Contact and/or edit the existing Contact.
976065	The "Unmappable" button has been added to the 'Interactive Map of Contact Addresses' dialog across My Inboxes, Contacts, Messages, Services, Events, and Boards. The button displays the unmappable record count and opens the drilldown results when selected.
977127	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.

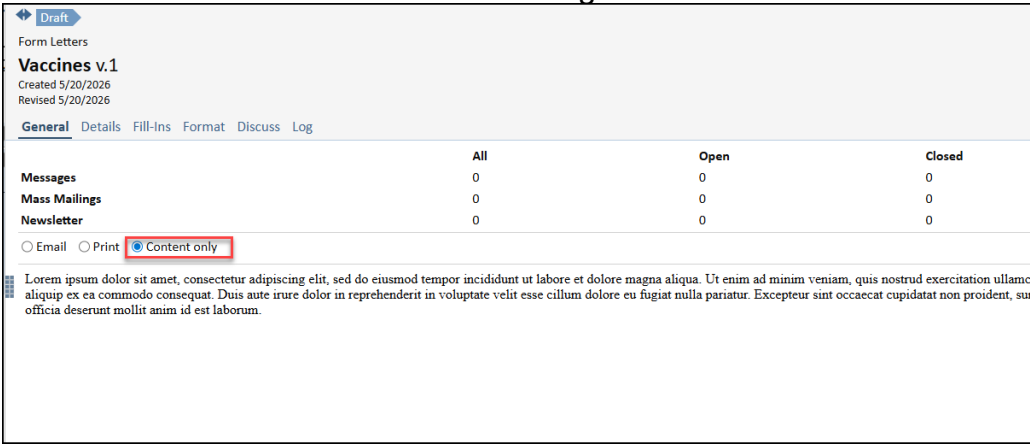
	 The screenshot shows the 'All Batches' interface. On the left, there's a 'Views' sidebar with categories like 'Unprocessed Messages (934)', 'Awaiting Letter Approval (7)', 'All Open Unbatched (21,915)', 'All Open with No Letter (22,342)', 'Batches Without Rule (3)', 'Batches Without Letter (2)', and 'Ready to Send (38)'. The main area displays a list of batches with checkboxes and labels like '#1 HOME', '#2 EQUITA', '#3 EGGS A', '#4 WILDFI', '#5 HRES.1', '#6 CLIMAT', and '#7 GAS PRICES'. A context menu is open for the selected batch, showing options: 'Change Pending Data', 'Merge Batches', 'Activate Batches', 'Archive Batches', 'Lock Batches', 'Unlock Batches', 'Change Owner', 'Change Batch Code', 'Include AI', 'Exclude AI', 'Delete', 'Clear Response and Auto Send', 'Clear Auto Send', and 'Configure Personal Tags'. The 'Change Batch' option at the top of the menu is highlighted with a red box.
977199	Campaign links are now shown in Message rows when Campaigns are assigned to Message records.
978151	A Letter Date field and a Clear Date checkbox have been added to Change Data for Messages.
978442	The "No Incoming" (Method In) and "No Outgoing" (Method Out) filters are now available in the Advanced Messages Search screen and can be accessed in both the Include and Exclude sections.
978444	The following enhancements were made to the Search pages throughout IQ5... 1. Select multiple options in multi-value fields while the drop-down remains open. This is done by holding down the Shift key and scrolling through the drop-down. 2. Added a Reset button at the bottom of Search pages to remove previous selections and start over. 3. Fixed problems with the "Filter Result" checkbox when conducting quick searches in grids.
979661	Change Status drop-down field has been added to the Post to Message dialog in the Exception Set.
980064	The display location of the Comments field for a message record has been tweaked based on the following set of rules: 1. If Source is "No Incoming" then don't show the Incoming or Summary Tab and the comments, go in the header. 2. All other Sources that have no incoming attachment should display the Comments field in the Incoming section message body. 3. If there is an incoming attachment, then show the comments in the Header.

982389	In the Campaign List view, there is a new Variation Count column and a Sort option. In addition, the "Unique Variations" link, in the Variations panel, opens a list of Message records for the Unique Campaign Variations.
985762	Read only Message Custom Fields have been added to the Incoming tab in the reading pane. The custom field will display on the Outgoing tab if for messages whereby the source type is "No Incoming".
987613	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 shows the 'All Active Batches' interface. On the left is a table with columns: Batch Name, Open, Total, Rule, and IMA Rule. The table lists various batches, including 'COVID SCHOOL OPENINGS', 'TIK TOK CONCERNS', 'ELECTRIC VEHICLES', 'GUN CONTROL', 'MASS MAILINGS PROFILE CASEWORKER', 'MARCH COVID BATCH', 'LOCAL ECONOMY ISSUES', and 'GOVT SHUTDOWN'. The 'LOCAL ECONOMY ISSUES' batch is highlighted. On the right is a detailed view for 'LOCAL ECONOMY ISSUES', showing it is an 'Active UnLock Batch' owned by Jonathan Kilgore, active on 1/19/2023 at 03:21 PM. It includes tabs for Summary, Report, Discuss, and Logs. The Summary tab shows 'Open Messages 0', 'Total Messages 3,006', and 'Total Campaign 1'. It also lists 'Campaigns' (Tipping should not be mandatory!) and 'Others' (Completed 3,006). At the bottom, there are sections for 'Response Rules' and 'Issues' with buttons for Edit, Response Rule, Send, Print, Enable Auto-Send, and Finder.
987749	The "Remove Campaign Rules" action is now available on the Campaign List page for both in-row and multi-row actions. Users can remove rules from the campaign only or optionally remove them from Pending Messages.
988208	The "Split Contacts" in-row action is now available for Built Mass Mailings, allowing users to split Mass Mailings into smaller groups.
988764	"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	
CR#	Feature Description
939925	The "All eNewsletter Templates" view is now available in the eNewsletters Group under List Views in the Outreach module. The View supports the following Actions: "Edit Form letter", "Edit Content" and "Delete".
964382	Newsletter content in the Newsletter Wizard now auto-saves every 5 minutes when changes are made.
968798	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.
971563	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). 
Services	
CR#	Feature Description

940570	The following requested changes were made for the PDF Fill Step App in IQ5 Services: 1) Do not prompt for Library Directory 2) When returning to the Reading Pane Summary the Attachments section is now refreshed
944912	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.
968674	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.
970668	The 'Phone # or Email Address' search field is now available under the Primary Contact section on the Services Advanced Search page, making it easier to locate specific service records.
976965	From the Activity section, users can select which incoming email attachments should be attached to the Service record.
978016	By making edits to the Service template in IQ4, users can now control which UDFs display in IQ5 Log Call. Check or uncheck the "Hide in Log Call" option under the Tool Rules section in the Edit UDF dialog.
979660	An "Updated Date" column option has been added when generating a spreadsheet from a list of Services in IQ5.
980846	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. 

982683	Hyperlinks added in the Activity Section of Services are clickable in the Service Reading Pane. Hyperlinks added in UDFs of Service Records are clickable in the Service Reading Pane and the expanded zone of the Services Grid (for UDFs that display there).
982868	The Open Message link and "More Message Options" button now open the Edit Message dialog instead of drilling down into a single message.
986099	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.
	
986169	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.
	
987113	Closing notes will automatically pin to the top of the activity section of service records - even after reopening services.

987226	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.
988316	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.
988318	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	
CR#	Feature Description
975228	The following additional grid icons have been added to in-row actions to Library Form Letters: Copy, Approve, Preview, and Version.
976807	The Library Files Reading Pane now supports preview for Word, Excel, RTF, TIFF, and MSG files, and includes a new "Download" button for direct local download.
980687	Users now have the ability to sort by "Total Count" in the list view for Form Letters.
984957	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.  The screenshot shows the 'Form Letters' interface. At the top, there's a 'Draft' button and the title 'Form Letters'. Below that, 'Vaccines v.1' is listed with creation and revision dates. A tabbed interface shows 'General' selected. Below the tabs is a table with columns 'All', 'Open', and 'Closed'. The table has three rows: 'Messages', 'Mass Mailings', and 'Newsletter', each with a count of 0. Below the table are three radio buttons: 'Email', 'Print', and 'Content only'. The 'Content only' radio button is selected and highlighted with a red box. Below the radio buttons is a large text area containing placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.'
Events	
CR#	Feature Description

985468	The "Delete" in-row action is now available on the Recurring Events list page, allowing users to delete items directly from the list.
Admin	
CR#	Feature Description
959903	A new "Logged In" filter is available in the Admin Application. This filter shows users logged into IQ5 and IQ4.
971570	Deleting single events in IQ5 gets written to Record Restore. Users are now able to restore deleted events.
972618	The Suspend User action has been added to the Edit/Options button (in-row action) of User records. When this action is selected a popup dialog displays prompting the user to choose another one to take over IQ activities.