IQ5 New Features Version 1.11

Highlights:

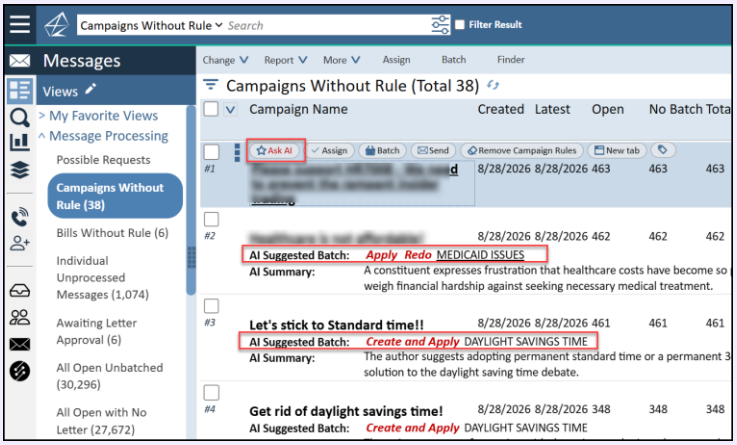
1. AI SUGGESTED BATCHES + AI FORM LETTERS

This sneak peek highlights AI suggested batches for campaigns and AI form letter generation based on Batches. You'll soon be able to navigate to Campaigns and either:

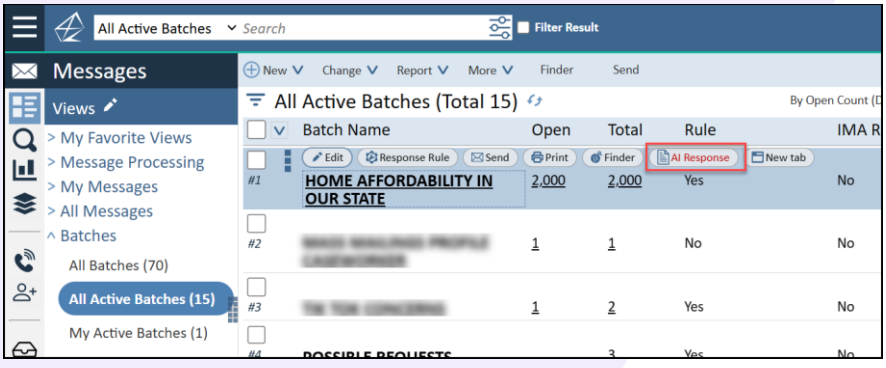
a. Ask AI to suggest or create a new batch based on its topic,
b. Create and apply a brand-new batch that AI suggests,
c. Apply/Redo using existing batches your office already has.

Once complete, you can then navigate to the batch, select AI Response which will allow you to fill out a prompt to suggest a reply based on the content of the batch and your inputs. This preserves the human touch, while allowing for increased efficiency in message management and response.

AI Batching:



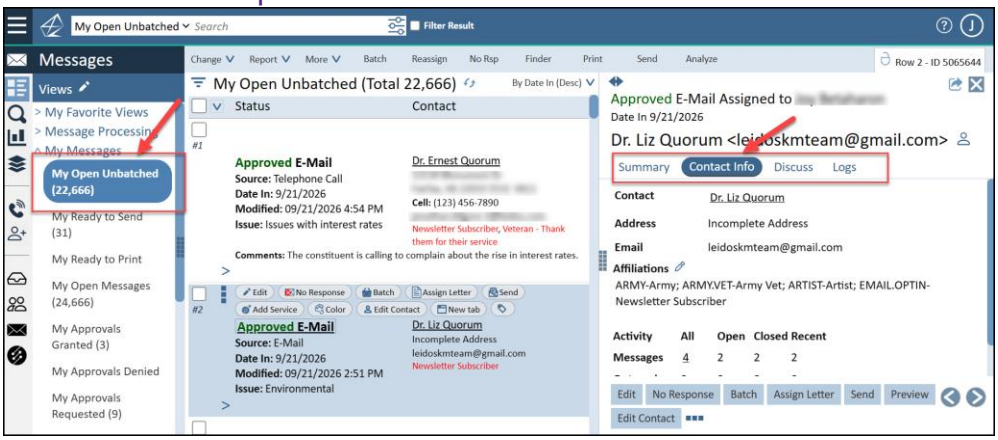
AI Form Letters:



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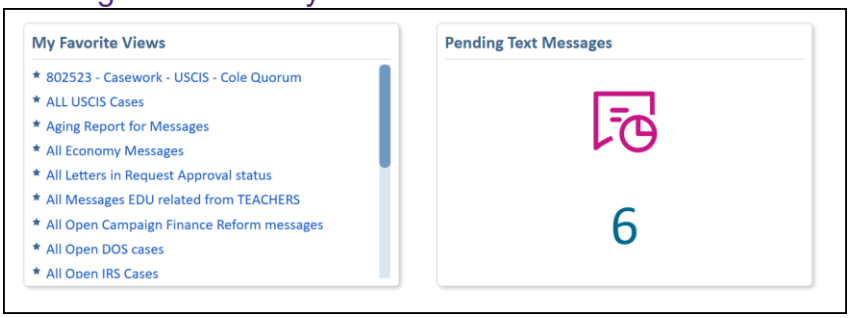
2. ENHANCED IQ USER INTERFACE

The IQ5 UI was updated with cosmetic enhancements. Selected Views and tabs are now highlighted with a blue rounded box with white text and text editor borders are more prominent.



3. NEW HOME PAGE TILES

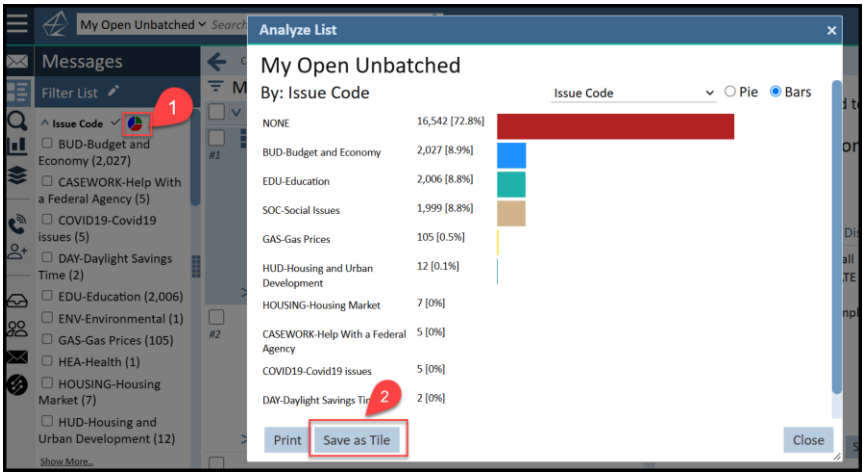
My Favorite Views and Pending Text Messages have been added as new tiles! These will allow you to view and access your Favorite Views and Pending text messages more easily!



4. SAVE FILTER ANALYZE RESULTS AS A TILE

Now from any Application of IQ, open up a Filter and select the pie chart icon and from there, save the filter analyze result as it's own tile on your Homepage. This will make it easy to create a dashboard of tiles that give you access to the information you need!

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5. NEW UNIQUE ICONS FOR SERVICES

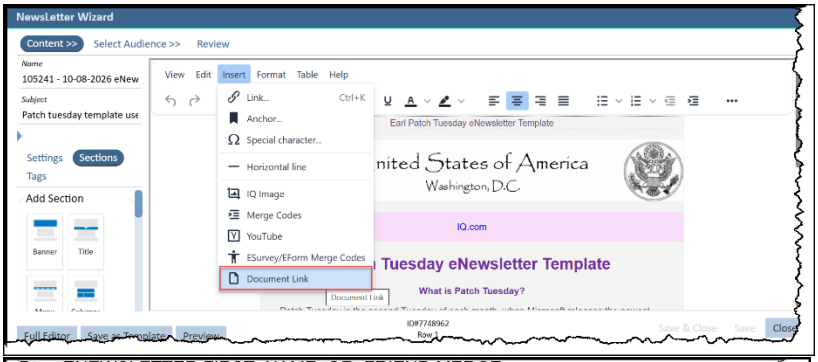
Differentiate between your Services more easily with new unique icons! Edit the Service template of your choice to select the icon you would like to display when viewing it from the Main Menu or Action Bar after it has been selected as a preferred application in your user settings.

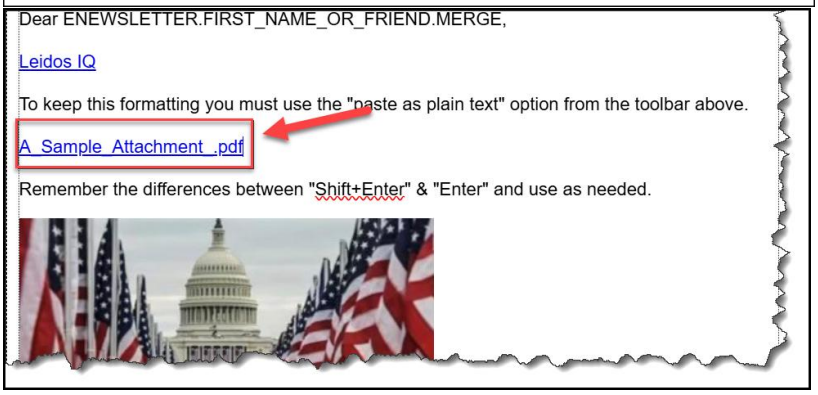


6. DOCUMENT LINKS FOR ENEWSLETTERS

Users can now upload attachments to their eNewsletters through the new Document Link Insert option. This allows users to upload documents that recipients of the outreach will be able to easily access, just like they do with a hyperlink.

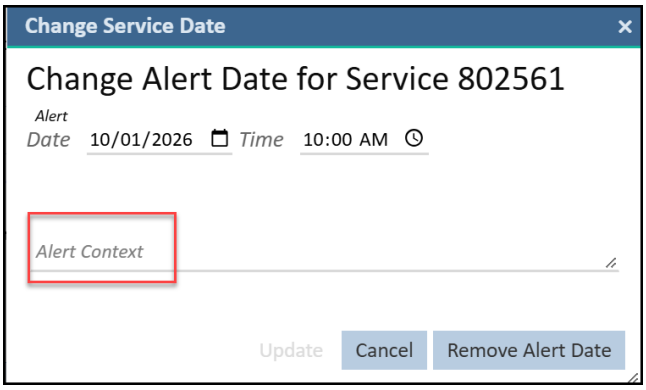
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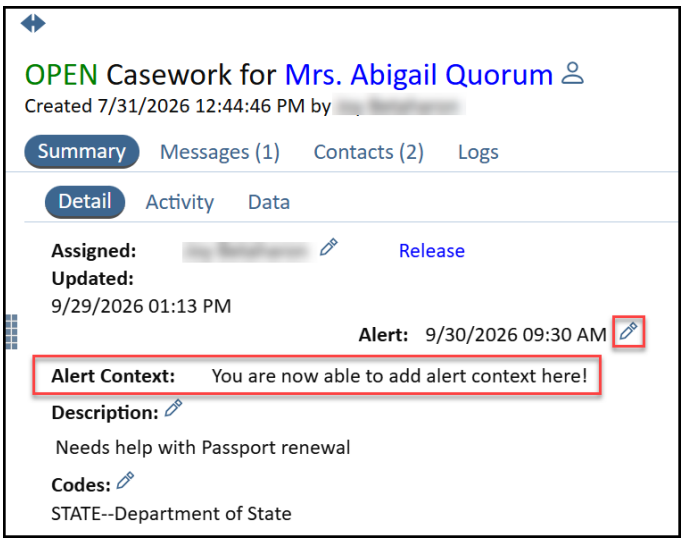


7. ADD CONTEXT FOR SERVICE ALERTS

Click the pencil icon next to an existing alert or click the + icon next to alert when viewing a service to be able to not only add the date and time the alert should come through, but also add a contextual message to explain why the alert is being sent/what the user should do when the alert comes through.

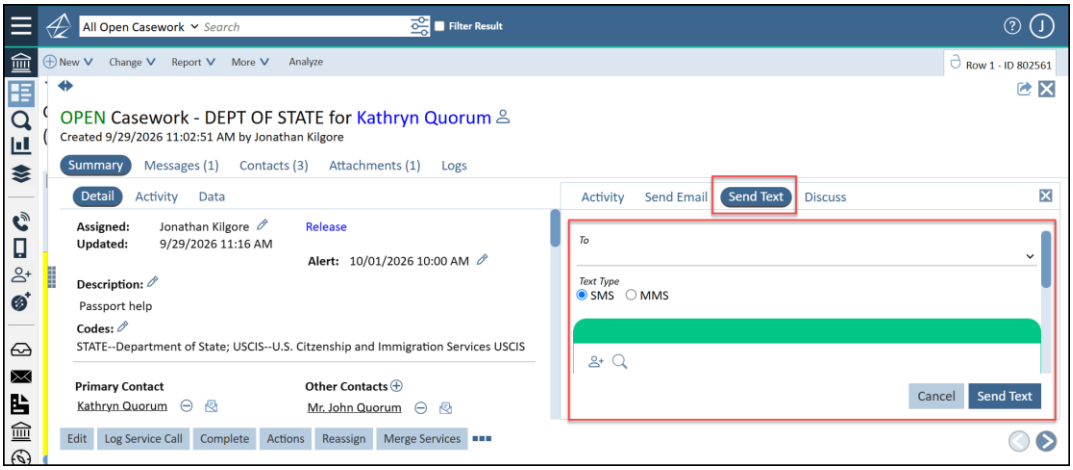


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8. SEND TEXTS WITHIN SERVICES

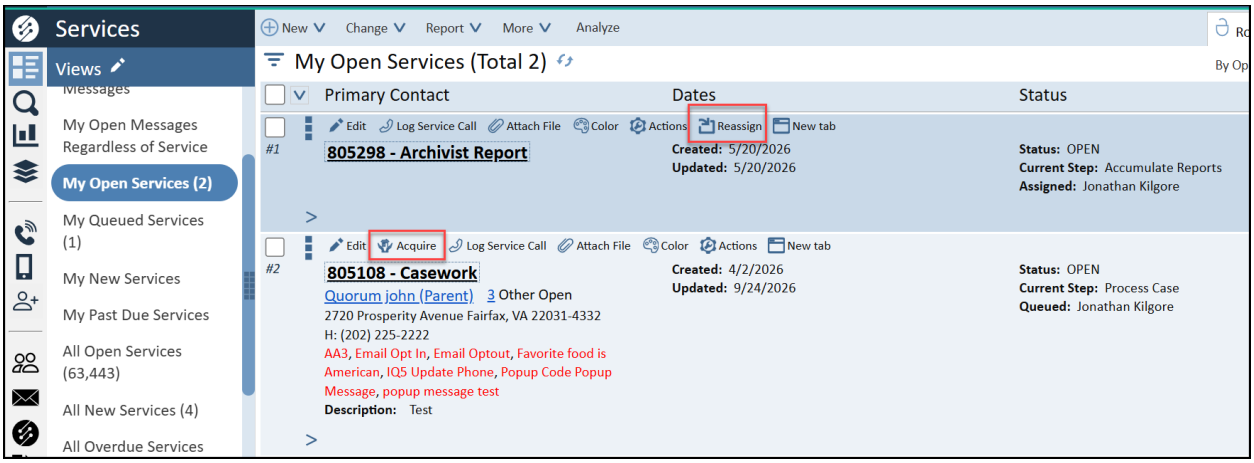
A new tab will now appear in Services called “Send Text” that will allow the user to send a text to an associated contact for the Service. Note that the Contact’s cell phone number must have “text opt in” checked for their number and you must have texting already set up via one of our third party integrations. Reach out to your IQ Consultant to learn more.



9. SERVICE IN-ROW ACTIONS UPDATED

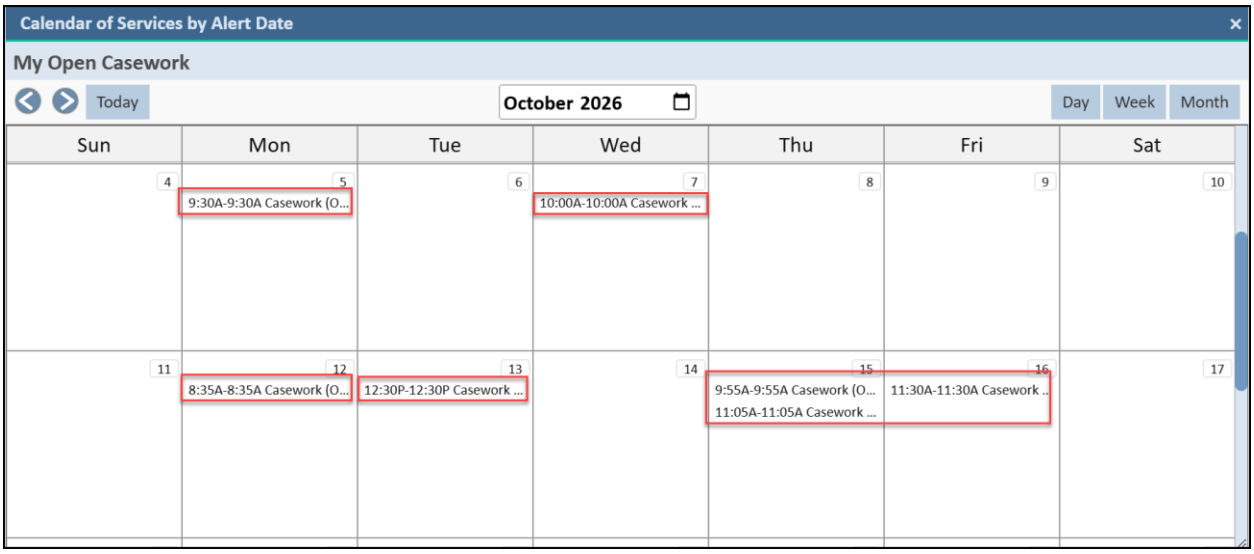
Acquire is now available as an in-row action for queued records, Reassign and Log Service Call are now available directly in-row, and less frequently used quick actions have been removed to reduce clutter while keeping Attach File in place. The Primary email address(es) and phone number(s) will now also display in the services grid for the primary contact of a service.

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10. CALENDAR VIEW OF ALERT OR DUE DATES

When configured, users can now view either their Service Alert or Due dates in a calendar view while viewing Services. The view is available by navigating to the Services with the Alert/Due dates, selecting More → Calendar. Alert/Due dates are hyperlinked to take the user to the Service they wish to view.



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AI

CR#	Release Notes
1000435 * ✓	A new AI System Parameter, "AI_AWS_Enpoint" has been added for the House to call AI using a proxy URL (i.e. https://iqbpapi.housed.gov) instead of going directly to the public AWS endpoint. Note: The IQ5 release does NOT create the new System Parameter. It must be added manually with SQL.
997093 *	The "Form Letter Prompt" field is now available in the AI Setting section of the IQ5 System Configuration page, allowing users to create dynamic prompts to use AI to generate form letters.
997091	A new dialog called "Add Form Letter with AI" is available under the New menu in the Library grid. The dialog consists of two tabs to answer dynamic prompts and refine talking points. From the dialog, users can create a new form letter.
993676 *	Configuration put in place for IQ to run AI features using the Google Gemini model. See document attached in CR record for SQL Statements.
993673	*Code changes were made to remove any SQL/XSS injection from the AI Prompt Responses (Prompt Output) before adding it to the database to prevent it from being injected into the UI. This includes the AI Summarization and Categorization calls.*
985593 *	*IQ5 Help infused with AI. When configured, there is a new option under the Help icon (question mark) called "AI IQ Help." Clicking this opens up a dialog where users can ask a question about IQ5. See document attached in CR record for SQL Statements.* *Note: This is still very much a work in progress in terms of the Help documents available in the AI Help Bucket. Development was provided some files to implement*

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CR#	Release Notes
	the structure of this feature, but more Knowledge documents are required to ensure that the AI Model can find proper information.

GENERAL

CR#	Release Notes
1000038	Code changes made to the way IQ5 creates temporary tables.
999413	A "Disable Record Counts on List Views" checkbox was added on the User Settings General tab to hide View counts for better performance.
996280	Oracle Data Provider for .NET (ODP.NET) Core has been updated from 23.6.1 to 23.26.2
996258	Updated https://github.com/Humanizr/Humanizer from version 2.14.1 to 3.0.10 based on the IQ5 v1.10 SBOM.
994372	Additional code changes made in various places related to the Int32 Relation ID problem.
994344	The IQ5 UI was updated with cosmetic enhancements. Preview panel headers, Service preview sub-headers, and Edit dialog backgrounds are now white. Selected Views and tabs are now highlighted with a blue rounded box and white text, and the text editor borders are more prominent.
989374	Clicking an IQ5 record link/url in an Alert email now opens a new browser tab without prompting the user to log into IQ5 if that user is already logged into IQ5. This is also true for "Open in new tab" for Log Call, Mobile Entry, etc.

HOME

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CR#	Release Notes
998895	The new My Favorite Views tile is now available on the Home Page, allowing users to access their saved Favorite Views across IQ5 modules. Users can drill down from the tile to the corresponding module and view, providing easier access to frequently used Favorite Views with fewer steps.
997972	The Pending Text Messages tile is now available on the Home Page, allowing users to view pending text messages that require review and drill down to the corresponding results.
972731	The ability to save Filter Analyze results as Home Page tiles is now available, allowing users to create customized Pie chart or Bar chart tiles directly from the Filter Analyze module. Tile sizing has also been improved so tiles display in the new 1 -by- 1 format within the View panel, including Dashboard tiles with Pie or Bar charts.
922772	Quick Launch icons are now available for service menus. This is controlled at the Service Template level on the Definition tab. There is an icon dropdown that allows users to select a graphic that will show in the menu when a template is set as a service application.

CONTACTS

CR#	Release Notes
995528 ✓	The following changes were made in response to reports of slowness from the Senate in the IQ5 Contact Advanced Search... 1) Implemented the materialized views that were added by IQ4 TR 273249.

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	2) Removed a SQL statement, that is no longer needed, to retrieve the User Display in Message and Service Activity in the Contact Reading panel.
988769	*The IQ5 "Phone List Update" under Contacts > Imports > User Imports > +New has been updated to include the ability to select the Communication Type, Set Primary, Status, Do Not Call, Do Not Text, and/or Text Optin for a list of Phone Numbers in a CSV source file. This tool updates the COMMON_PHONE and/or COMMUNICATION_ATTRIBUTES tables based on the matching (or not matching) phone numbers in the CSV file.*
986421	Contact search has been improved in Services, Contact Grid, Sets, Opinion, and Mobile Entry. Searches using Title, ORG1, and ORG2 now return more flexible and accurate results, making it easier to find contacts.
986017	Precinct, County, and Congressional District fields are now available in the Home and Business Edit Address dialogs accessed from the Contact Reading Pane, allowing users to view and edit these values directly. If Address validation is performed, County and District are updated by Address Checker. Precinct is not returned by Address Checker and remains user entered.
977407	Added ability to Import Contacts into IQ5. Note: This does not include Duplicate Checking or Address Checker to verify mailing address.
975295	Search requirements in Opinion and related screens have been updated to support more flexible search combinations now that additional search fields are available. Searches are no longer limited to first and last name only, allowing combinations such as organization and first name while still preventing invalid searches and preserving accurate results.
973320	Affiliation code popup messages now support configured color display across updated areas, including Contacts, Mobile Entry, Opinions, Messages, and several

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	other places. Existing popup messages will continue to display in the default red unless a different color is selected.
959989	*Status Log text searching is now available in Advanced Searches in Contacts, Messages, and Services.*

MESSAGES

CR#	Release Notes
998671	The "Ask AI" button in Message Campaign grids will now only appear when a user hovers their mouse over individual rows. The other text that displays when using Ask AI has been italicized.
998321	The optional "Clear out letter/issue from previous batch" checkbox is now available in the Message Batch Update dialog, allowing users to clear the existing Letter and Issue Code when moving messages to a new batch.
997969	The following enhancements were made to the Reply action for a pending Text Message: 1) The entire thread conversation is now displayed in the Incoming tab of the Message Reading pane. 2. The Contact's Cell Phone and Twillio/Broadnet phone number are displayed at the top of the Text bubble like this: (703) 427-9357 ------ (202) 349-1542.
997242 ✓	The following changes were made based on customer feedback... 1. The Completed button is now available in the Edit dialog for a newly created Outgoing only Message record. Previously, the user had to Save and Close the dialog and then open it again in order for the Completed button to appear.

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	2. Clicking a Message record link in the Service Activity has been changed back to opening a grid of one, so the user can delete the Message record. In addition, a pencil icon has been added to access the Edit Message dialog for open Messages.
996832	The "Remove When Emptied" checkbox is now super sticky for each IQ5 user. This means when an IQ5 user adds a new Batch and unchecks the "Remove When Emptied" checkbox, logs out of IQ5 and back in, then adds another new Batch, the "Remove When Emptied" checkbox will NOT be checked.
994409	The following enhancements have been made to the Messages Reading pane: 1.) Added email address to msg reading pane header section. 2.) Used new Attachments method that displays "Attachments:" with the paperclip icon.
993749	Users now can change the incoming method/source for multiple messages at once as well as update/change the incoming date for a single or multiple messages.
992986	The "Closed By" filter now displays the most recent User who closed the message. Previously, it continued to display the initial User who closed the message after message was reopened and closed again.
991589	When removing a Batch from a Campaign (via the Campaign Batch and Issue Update in-row action button in the Campaign grids) and then selecting the Remove Current radio button in the dialog that opens, the information logged in the Logs tab will include the name of the batch that was removed.
986502	The "Entered Month" filter is now available in the filter list for the NonDeliverable Set and all other Set types, allowing users to filter records by month, with the most recent months displayed at the top.
985807	The "Salutation" field in the "Post to Messages" dialog is now sticky for each IQ5 user when posting Set records.

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CR#	Release Notes
985566	Sets filters now include Assigned To, Incoming Issue Codes, Email Format, Address Line 1, State, Zip Code, and Affiliation Code.
950221	*Selected Message records in a CWC Campaign can now be removed from the CWC Campaign with "Remove from Campaign" under the Change menu.* *Note: This action is only available for IQ5 Users with new Security Lock #382 Granted.*
941839	Added "Delete" under the Change menu to allow Set records to be deleted in mass. Note: If all of the records are removed from a Set, the Set Name (i.e. CONTROL_ID) still exits but is only visible in IQ5 in the "Move to another Set" dialog.
940136	AdHoc Campaign Finder has been added to IQ5 Sets and includes the "Post to Messages" action for creating Message records and Batching.

OUTREACH

CR#	Release Notes
999653	If a Pending Text Message is associated with an Outreach Mass Text, the Reply, Reply All and No Response actions are no longer available in the Replies drill-down list in the Outreach Mass Text Report tab if the record Status is 'Completed' (i.e. SMS_MESSAGES.STATUS = 'C').
998401 ✓	The following updates have been made to the Outreach Text Wizard... 1) The Alert message for the "Review Audience Size" option in the Select Audience step and the "Audience Size" in the Review step now contains the approximate

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CR#	Release Notes
	number of Contacts and number of Phone numbers that will be texted. Those counts may not match, since there could be shared/duplicate cell phone numbers. 2) A new "Texts Sent" column has been added to the Completed Mass Text grid. This column displays the total number of unique cell phone numbers that were sent a text message. 3) The Delivered column now displays a count for the number of text messages that were delivered. This column was previously empty.
997970	The Pending Text Messages view has been added to the Outreach module. The view now appears under both Messages and Outreach modules.
995492	The Detach Contact in-row action and Detach Contacts grid action are now available in the Mass Mailing Contacts grid, consistent with IQ4. The All Mailings view was removed from Mass Mailings views.
992255	The count down counter has been added to the message field inside the Outreach Text Wizard to indicate how many characters are left before reaching the limit.
991772	The new multi-select dropdown style has been added to the "Select Audience" tab for the following Outreach wizards: 1) Newsletter Wizard 2) Outreach Text Wizard 3) Mass Mailing Wizard 4) Townhall Wizard
989285	Updated the "Opt Ins" and "Opt Outs" counts in the Metrics tab for a completed Outreach Newsletter to include all three methods of capturing Optin and Optout - Survey, One-Click and URL.
967508	*IQ's web form builder is now available in IQ5.*

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940309	A new "Reach Summary" Report option has been added for completed Outreach newsletters, mass text and mass mailings. This option generates a total count of the selected Outreach records along with a unique individual count (i.e. removes duplicate Contacts).
935821	Users can now Upload an attachment to IQConnect and publish it via the Insert Link Attachment feature in eNewsletter TinyMCE.

SERVICES

CR#	Release Notes
998697 ✓	The Download Files as Zip feature is now available in IQ5 in the Services grid (under the Report dropdown menu). You can use it to download multiple attachments or library files at once from a list of services, instead of opening each service individually.
998395	Pop-up Affiliation Codes now display in the Service grids below the primary contact's contact information. This allows users to identify contacts with these affiliation codes without relying on the reading pane.
997708	Users can now view EML files 2 MB or Larger from the Activity section. Larger PDF, Word, and Excel files can also be viewed successfully.
997335	Added the ability for the IQ5 user to include additional content to a Service Alert as follows: 1) Click the Pencil next to the existing Alert date in Service Reading pane to open dialog and type notes in the Context field. 2) Click + next to Alert label in the Reading pane to open the dialog and enter an Alert Date and Context.

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CR#	Release Notes
	3) The Alert Date can be removed inside the Edit Service record dialog and the "Change Service Date" by clicking the "Remove Alert Date" button. 4) The emailed IQ Alert will include the text entered in the Context field in the body of the Alert. 5) The text entered in the Alert Context field is displayed in the Service Grid.
996063 *	A new web services version of Ohio DRC DOTS integration has been implemented and added a new system parameter to allow switching between the two API versions.
994871	The All New Casework and All New Services views now display only recently created open items from the last 15 days, making it easier to identify what is actually new. Additionally, the tooltip has been updated to clearly state "All New Open in the last 15 days."
994412 *	There is a new tab in a Service Record called "Send Text" which allows users to text (1-to-1 texting) an associated cell phone(s) of attached contacts. This CR also created a new Service System Setting called "Broadnet Text Number for Service" which allows users to designate a Decantr phone number to a specific Service Template. Note: This feature is only available using Broadnet/Decantr.
993865	Service row actions have been updated to make common tasks easier to access. Acquire is now available as an in-row action for queued records, Reassign and Log Service Call are now available directly in-row, and less frequently used quick actions have been removed to reduce clutter while keeping Attach File in place.

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993846	The Reply All option is now available for incoming messages in Services, allowing users to reply to all email addresses included in the message thread.
992502	For relevant Service records, there is a new action under the Edit/Options button in the service reading pane to "Convert to Original Message." Clicking this action allows users to convert the service to its original incoming message.
992365	The primary email address(es) and phone number(s) will now display in the services grid for a primary contact of a service.
992065	You can now use the Closed By field in search and filter areas to find closed services more easily. It works as expected across Services and Messages.
991084 *	Service Calendar views can now be configured through System Configuration under the Service Settings to display Services based on either Alert Date or Due Date.
989330	The "Include Services that have been Closed" and "Exclude Services that have been Closed" dropdown options are now available in the Message Primary Contact dialog, allowing users to include or exclude closed services when creating Message Primary records, consistent with IQ4. The dialog now displays a warning message (for example, "There are 2 service(s) are not open") when closed services are excluded, and the previous error that occurred when creating Message Records for closed services no longer occurs.
987998	The Social Media data for contact records linked to a Service record now displays in the Services Reading pane under the Details tab.
987694	The "Send Email" action of the service reading panel now displays the attached file with delete trashcan icon next to it. Previously, when a Form Letter was added with an attachment, the attached file was not visible.
980494	The Service Activity section and Activity tab now include a "Load All" button next to "Load More", allowing users to display all remaining activity entries without

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	repeatedly selecting "Load More" button. Additionally, the "Load More" and "Load All" options have been removed from the expanded Service record in Service Grid.
979264	There is a new action item called "Mass Change Service Role for Primary" available under the Change menu in Service grids. This action allows users to make mass changes to the roles of primary contacts attached to open or closed service records. Note: In order to use this function, all selected records must be using the same service template. If you select multiple records using different templates, IQ will alert you to select records using the same template.
979110	The attachment experience has been improved by making the click and drag area larger and easier to use. The attachment list now appears as a field on both the service reading panel and the edit page, making it simpler to add and manage attachments.
974597	The Monitor icon has been enhanced to provide a clearer visual indicator when a service record has an active monitor. The icon now changes color to a red hue for improved visibility, and the tooltip text includes the number of monitors associated with the record, making monitored services easier to identify at a glance.
973321	*When sending a future info copy (checking the Send Alert Later box) in the Send Information Copy dialog, there is a new checkbox that appears called "Alert after Closure." This gives users the option to allow a future info copy to still fire after the service is closed.*
50801	Custom Service Grids, configured in IQ4 Service templates, will now appear in IQ5 Service Lists. The only major difference in display from IQ4 is the table borders are not displayed in IQ5. Also, when the IQ5 Service List is too small to display the information properly (i.e. when the Service Reading pane is expanded, or the Browser window is too small), the custom grid will be hidden.

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LIBRARY

CR#	Release Notes
997744 ✓	The following two new merge codes have been added to the Form Letter/Custom Letter editor. 1.) MAIL.WF.PRIMARY.ADDRESS.FULLADDRESS.MERGE 2.) MAIL.WF.USERENTEREDSTEPNOTESTEXTFORMATTED.MERGE
986145	Logging has been added to the "new version" actions for both form letters and files. It also references the other form letter/file version number and ID of the source.

ADMIN

CR#	Release Notes
999244	The System Health section no longer displays API Callback or Application Exception errors when logging in to IQ5.
976786	Users can now Mass Update User Preferences for selected IQ5 User records.
972810 *	*A new "Outlook Mailbox Sharing" setting was added under Admin System Configuration Security Settings, with two choices:* *IQ Manages Sharing (default) - Administrators set up shared mailboxes inside IQ, and users simply pick one from a list; no personal Outlook connection is needed.* *Microsoft Manages Sharing (new model) - Each user connects their own Microsoft account once, and IQ5 opens shared mailboxes using that user's Exchange*

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	permissions. Nothing is stored per mailbox in IQ. The Outlook screen shows whether the user is connected and guides them to connect when they are not. *The setting is enforced on the server, so it controls both what the IQ user sees and how email is actually retrieved. Any tenant that has never set it behaves as "IQ Manages Sharing."*
970314	Three new Security Locks are available for Batches... 384 CreateBatch 385 ModifyBatch 386 DeleteBatch ...to control whether or not an IQ5 user can add a new batch, edit or delete an existing batch.

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