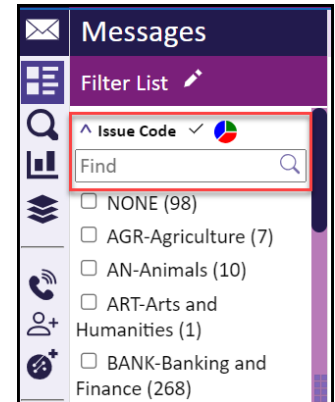


IQ5 New Features Version 1.5

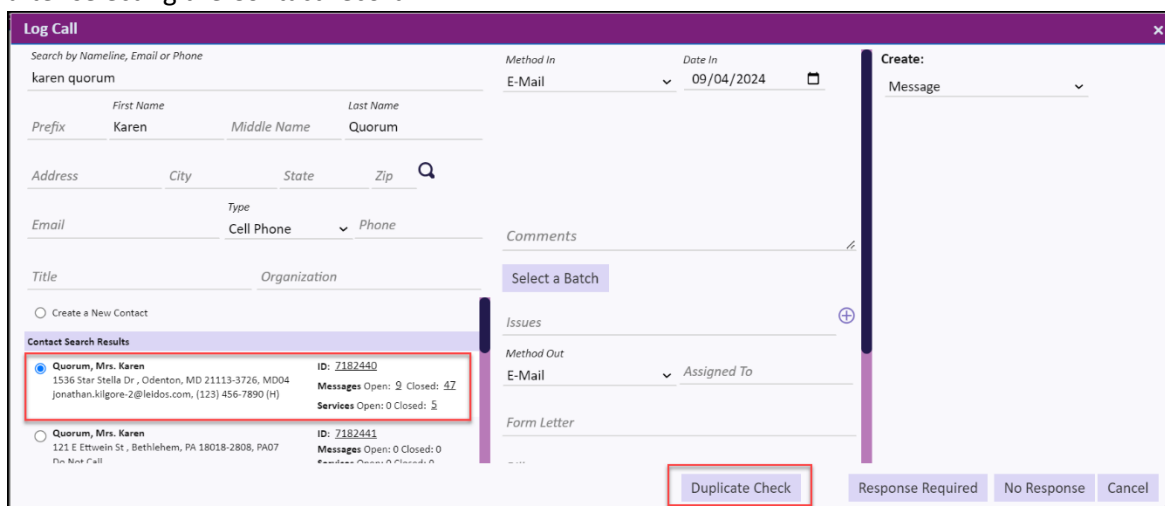
General/Home Page

- ▶ A new **Find** search box has been added to Filter Groups that have more than 10 items.
- ▶ When selecting a multi-row action in Messages, Batches, or Services, IQ5 will now provide a prompt to select all the records in the list if the user has not yet selected any records.
- ▶ New sort options, **Last Name (Asc) & Last Name (Desc)**, were added to the **Open Services** tile. Note that they will only be available when the **By Type** checkbox is not selected.
- ▶ A new **Send** link has been added to the bottom left corner of the **Ready to Send** tile, allowing users to send responses more quickly.
- ▶ A new Home Page tile named **Form Letter by Status** has been added, allowing users to more easily review and access Form Letters in draft, request approval, denied approval, Inactive, and Approved status'.
- ▶ A new Home page tile named **Form Letter Awaiting Approval** is now available, allowing fast access to those Form letters still awaiting approval.
- ▶ The **Work By Account** tile has been added allowing users to switch between accounts by clicking the account hyperlink.



Messages/My Inbox

- ▶ A new in row action, **Add to Source Service as New Message**, has been added to the Outlook Messages Inbox for IMA response messages (i.e. have the IMA Transaction ID in the subject).
- ▶ The Log Call screen now has a **Duplicate Check** button, allowing users to check for duplicates after selecting the Contact record.



- ▶ Users can now save and search for contacts using just a first name and a phone number!
- ▶ When viewing a closed Message, IQ5 now displays a green **Viewed Date** in the top right hand corner of the reading pane.

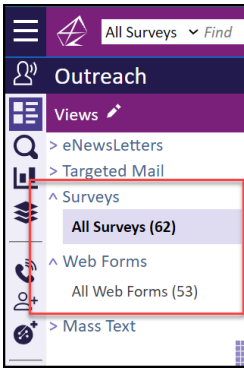
- ▶ **Date In** and **Month In** filters have been added to the **Pending Text Messages** view in IQ5.
- ▶ The Messages App now includes a **Social Messaging** Section that has three views, **Pending Social Messages**, **All Social Messages**, and **Closed Social Messages**.
- ▶ **Change Pending Data** has been added to the Change menu for mass updating pending messages records in multiple selected batches. Additionally, **Change all selected mail to completed** has been renamed **Change all selected non-email to completed**.
- ▶ The **Executive Report** has been added to the IQ5 Messages grid under the **Report** grid action.
- ▶ The **Request Approval** action has been incorporated into the **Change Data and Status** dialog page for Messages.
- ▶ **No Outgoing** has been added to the Outgoing Method field in Messages **Change Data**.
- ▶ In the Messages reading pane a **Paperclip** icon has been added to attach an **Outgoing Copy** allowing a user to manually add one file to the message.

Services

- ▶ The **Send to Tour Trackr** step application is now available in IQ5 Service records.
- ▶ Service records no display a green checkmark for library files that are checked out, along with a tooltip indicating who currently has the file(s) checked out.
- ▶ Message records can now be attached to closed Services.
- ▶ New Pencil icons have been added to fields in the reading pane under the Summary tab allowing for faster editing of specific fields.
- ▶ A new sort option, **Service Type**, has been added when viewing a list of Services.
- ▶ The **See More** link now has a **Detach Contact** action for Services with more than 3 attached contacts.
- ▶ The **Send Alert** checkbox in the Case reassignment dialog has been made 'super sticky'.
- ▶ **Message Primary** has been added to the Change multi-row action menu in the Services List Results. This allows users to create a Message record for the Primary contact for each of the selected Service records with the same letter, issue code, etc.
- ▶ The "Search Affiliation" single field is now available in all "Find or Add Contact" dialogs across Contacts, Services, and Events modules, allowing users to search and add Contacts based on Affiliation Codes.

Outreach

- ▶ Surveys and Webform List pages have been added to the IQ5 Outreach application. Surveys can be created and edited while Webforms can be viewed, published, and tested.



- ▶ The **Image Manager** view is now available in the Outreach Application and Library Application.
- ▶ Clicking the **Preview** button while working on a Newsletter now automatically saves the users work.