

How to Set and Access Preferred Service Templates

Market: Federal/State/Local, House, Senate

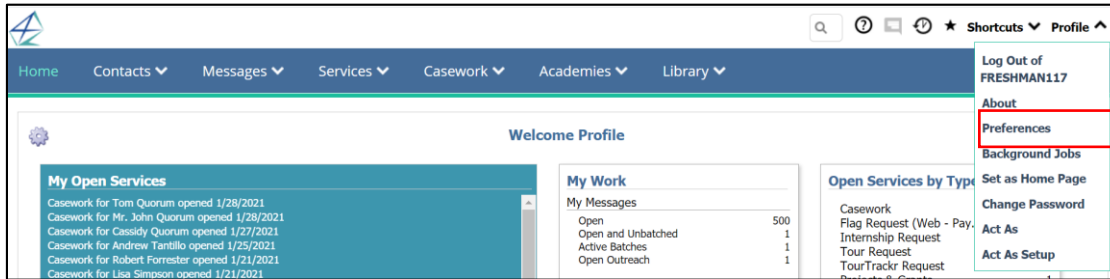
Module: General > Preferences

Purpose: This guide provides instruction on how to set and easily access your preferred service templates.

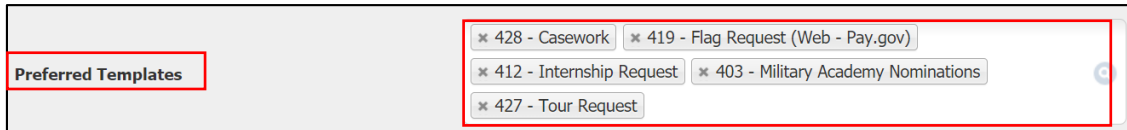
Key Benefits

IQ enables you to select service templates that you use frequently and displays them as a set of preferred templates. This reduces your time to search for specific service templates when you are creating a new service records. Thus, this is a time-saving technique.

1. Select **Preferences** under your profile name.



2. Open **Services** in the **Preferences** window.
3. Type the name of the service template(s) in the **Preferred Templates** field.



4. Click **Save**. The next time you create a new service record, the service templates from your selection will be displayed.

