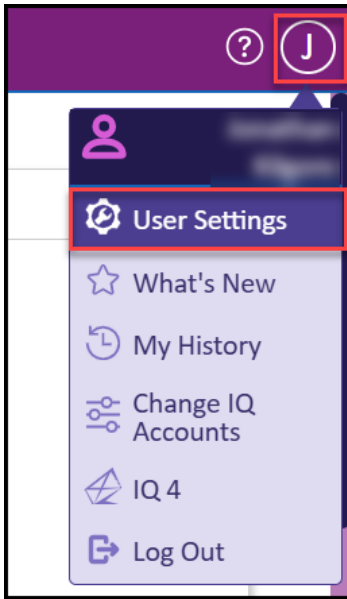


Setting Default & Preferred Service Templates

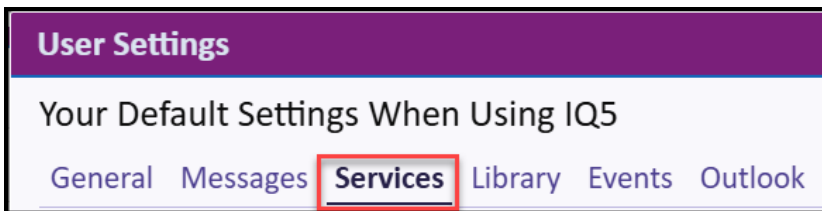
Market: House, Senate

Description: These instructions teach users how to set their preferred or frequently-used service templates.

1. Select **User Settings** under your first initial in the top right corner.



2. In the User Settings window, select the **Services** tab.



3. Click into the **Service Applications** dropdown.
4. Select the Services that should be preferred (meaning they will appear first when going to create a new Service).
 - a. ***Note:** Services selected here will also now be available as their own applications in IQ5, allowing for easier management.
5. Click into the **Default Template for New Services** field and select the template you'd like to be the default.
6. Choose whether you'd like to have the UDF section in Service lists expanded by checking or unchecking the box.

7. Choose whether you'd like to display the address of attached Contacts in a Service by checking or unchecking the box.

The screenshot shows a 'User Settings' dialog box with a purple header and a close button (X) in the top right. The main title is 'Your Default Settings When Using IQ5'. Below this is a navigation bar with tabs for 'General', 'Messages', 'Services' (which is selected and underlined), 'Library', 'Events', and 'Outlook'. Under the 'Services' tab, there are five buttons with close icons (X): 'Academies (Military Academy Nominations)', 'Casework (Casework)', 'Flags (Flag Request (Web - Pay.gov))', 'Grants (Projects & Grants)', and 'Scheduling (Scheduling Requests)'. Below these buttons is a section titled 'Service Applications' with a horizontal line. Under this section, it says 'Default Template for New Services' and 'Casework'. There are two checkboxes: the first is 'Expand UDF section in Service Lists' and is unchecked; the second is 'Display address of attached Contacts in reading pane' and is checked. At the bottom left is a 'Reset Other Settings' button, and at the bottom right is a 'Done' button.

8. Click **Done**.

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