

Action Bar Icons

Market: House, Senate

Description: Description of the Action Bar icons

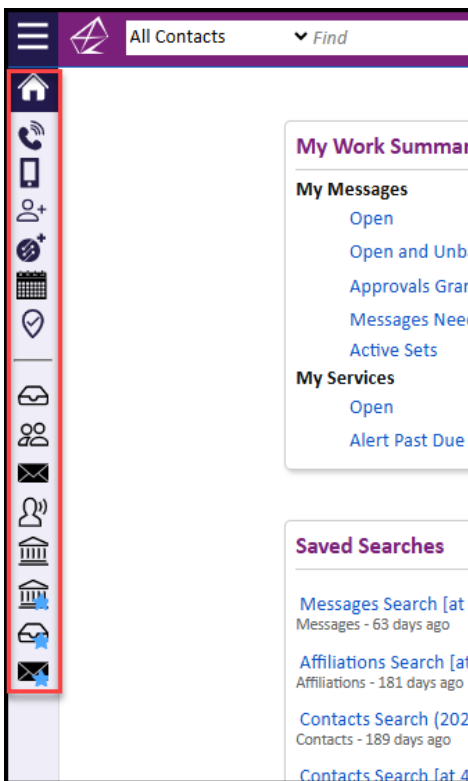
[Configuring the Quick Action Icons](#)

[Pinned Applications](#)










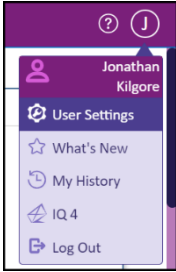

[Pinned Favorites](#)

Configuring the Quick Action Icons

There are several icons on the left-hand action bar and in the top upper right-hand corner of the IQ5 dashboard. Below is a glossary of the icons and their corresponding applications. The pinned Quick Actions are configurable. See below.

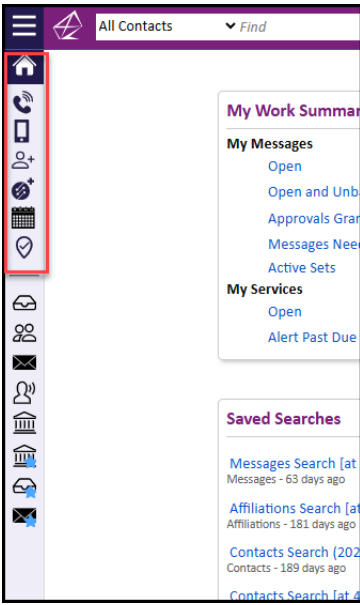


Icon	Application	Description
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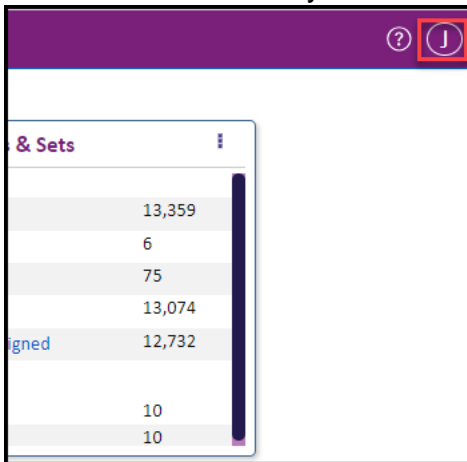
	Log Call	Allows you to quickly log an opinion from any application or view.
	Find or Add Contact	Allows you to quickly find a contact or add a contact.
	Mobile Entry	Allows you to search for a contact, add affiliation code(s), or create a message or service.
	Add New Service	Allows you to quickly create a new service request.
	Add Event	Allows you to create a new event easily and quickly.
	IQ4 Dashboard	Takes you to a series of easy to view, clickable reports showing different aspects of your office's IQ work.
	Tour Trackr	If your office subscribes to this service, Tour Trackr allows your office to easily track and manage tour requests.
	Help	Takes you to the online help section with "how to" articles organized by application.
	Option button for additional features	When selected, additional options appear: 
	User Settings	This is where you can set your systems preferences, such as screen color and preferred service applications.

Configuring the Quick Action Icons

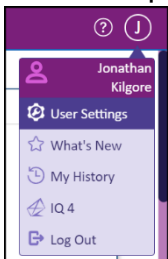
This option allows you to control which icons you see in the Quick Action section of the Action Bar.



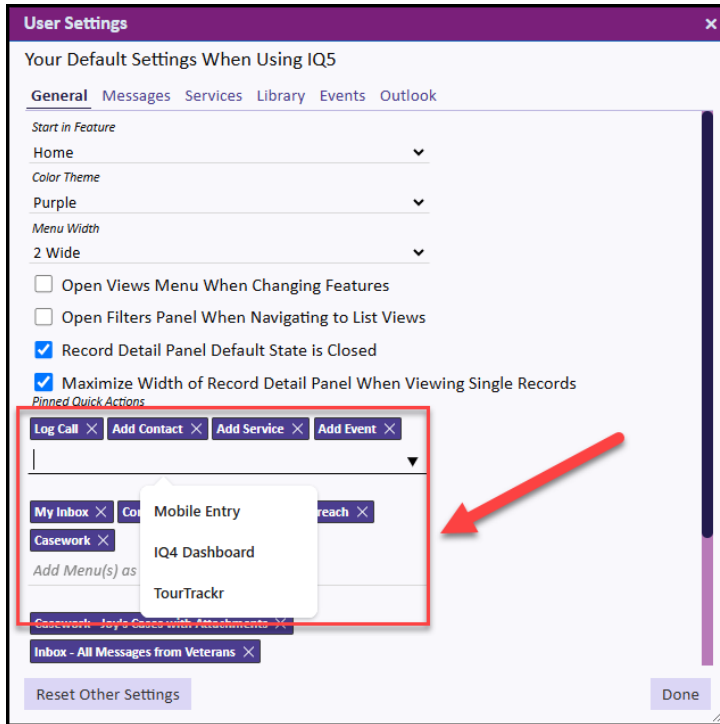
1. Click on the initial of your name in the upper right-hand corner.



2. In the drop-down, select User Settings.

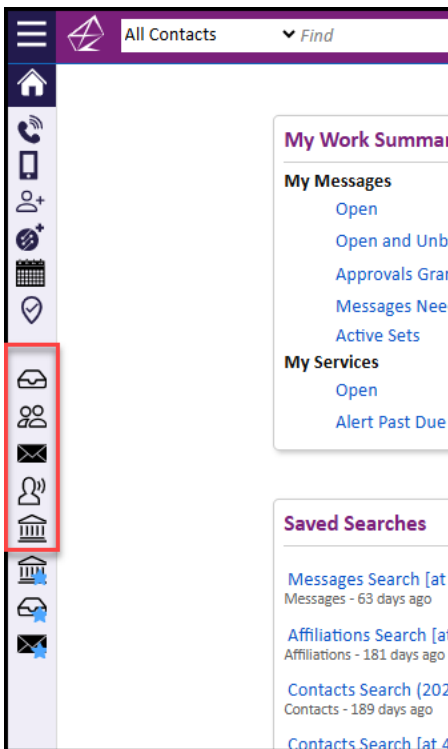


3. In the User Settings window in the General tab, select the options you want displayed on the Action Bar by clicking in the Pinned Quick Actions field.



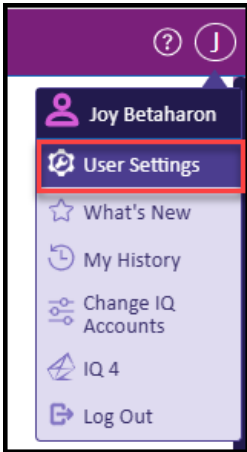
4. Select Done.

Pinned Applications

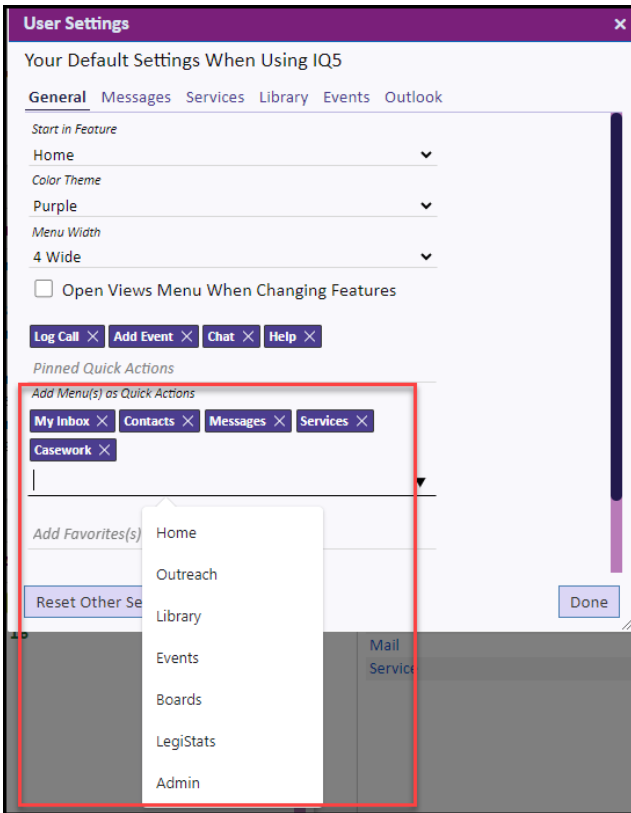


Below the static horizontal line, users can “pin” applications to the action bar.

1. Click your initial in the upper right-hand corner and select User Settings.

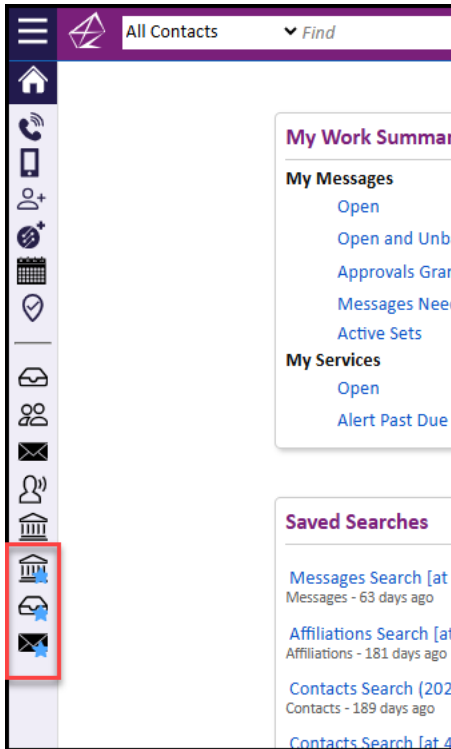


2. Under General, in the *Add Menu(s) as Quick Actions* section, you can delete applications or add them by clicking in the field and selecting the application.

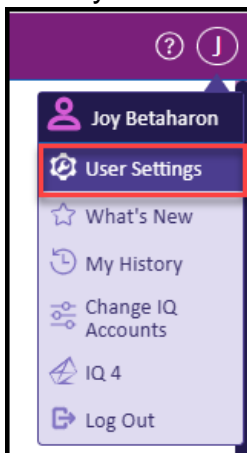


3. Click Done.

Pinned Favorites



1. Click your initial in the upper right-hand corner and select User Settings.



2. Under General, in the *Add Favorites(s) as Quick Actions* section, you can delete applications or add them by clicking in the field and selecting the application.

User Settings

Your Default Settings When Using IQ5

General Messages Services Library Events Outlook

Open Views Menu When Changing Features

Open Filters Panel When Navigating to List Views

Record Detail Panel Default State is Closed

Maximize Width of Record Detail Panel When View

Log Call X Add Contact X Add Service X Add Event X

Pinned Quick Actions

My Inbox X Contacts X Messages X Outreach X

Casework X

Add Menu(s) as Quick Actions

Add Favorites(s) as Quick Actions

Casework - Joy's Cases with Attachments X

Inbox - All Messages from Veterans X

Messages - Messages from Veterans X

Allow These Users to "Act As" Me

Switch to Another User ("Act As" the Selected User)

Reset Other Settings

- Casework - All Closed with Memo
- Casework - All IRS Cases
- Casework - All Open USCIS Cases
- Casework - ALL USCIS Cases
- Casework - DOL Cases
- Casework - FEMA and DHA Cases
- Casework - joy's cases
- Casework - June 20 - Rep LaHood Fave Demo
- Contacts - April 13 Fave Contact List
- Inbox - All Education Messages from Teachers - Aug 22
- Inbox - All my messages from TEACHERS
- Inbox - All of My Messages from Teachers about EDU
- Messages - All Bud and Econ Messages
- Messages - All budget and economy
- Messages - All messages that need help from Fed Agency
- Messages - Aug 15 - All of the BANK and AGR open messages
- Messages - Sample Favorite View
- Messages - Save Search - All messages from Vets regarding BUD and ECO
- Services - All FEMA Cases
- Services - Constituent Savings Report by Agency
- Services - Dec 21 USCIS Cases
- Services - Fave Demo
- Services - Jan 18 VA Cases
- Services - Joy's USCIS Open Cases
- Services - Open IRS Cases