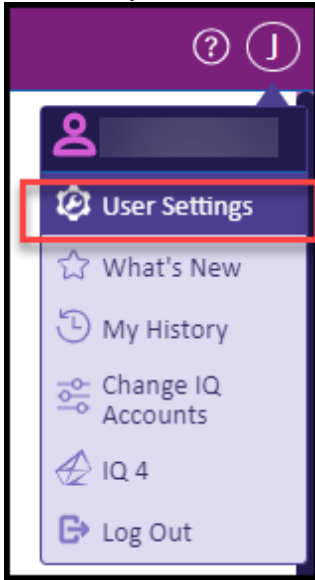


## IQ5 User Preferences

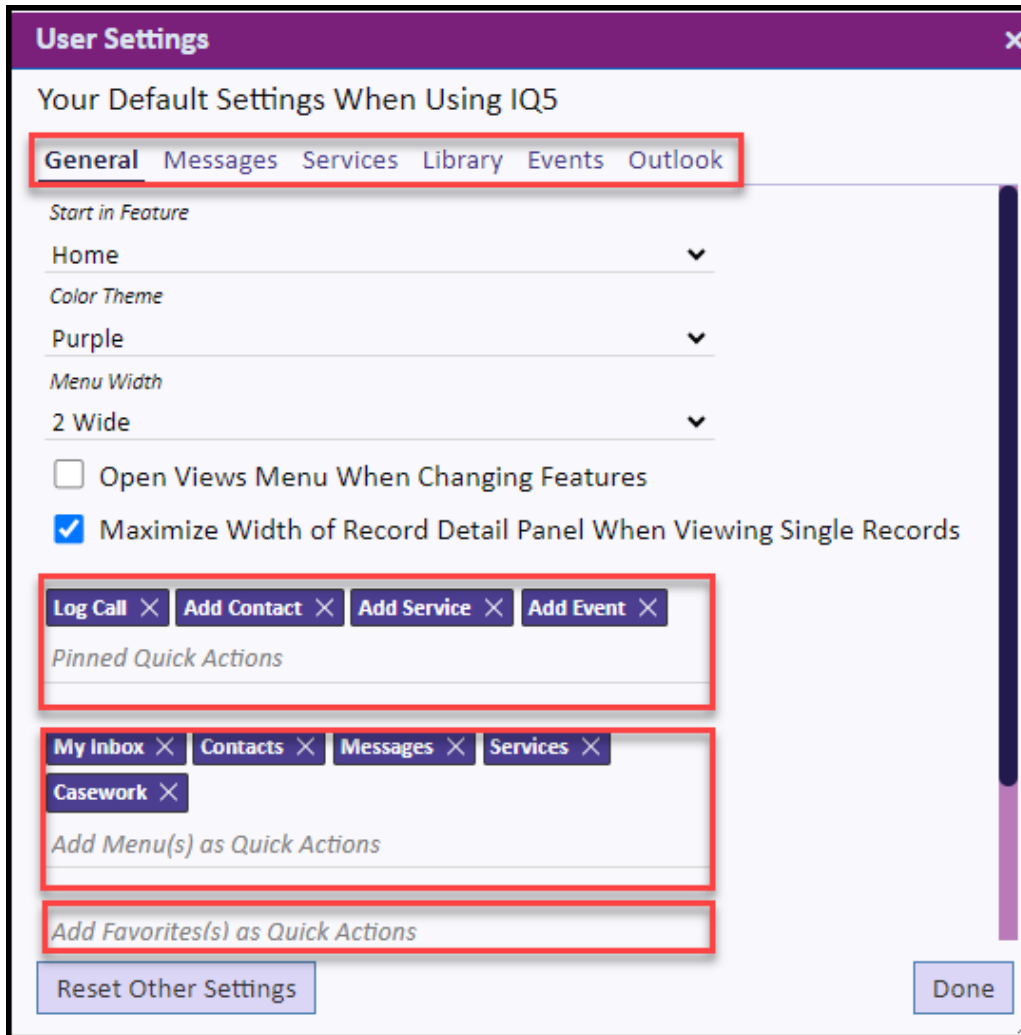
**Market:** House, Senate

**Description:** These instructions teach users how to set their User Preferences in IQ5

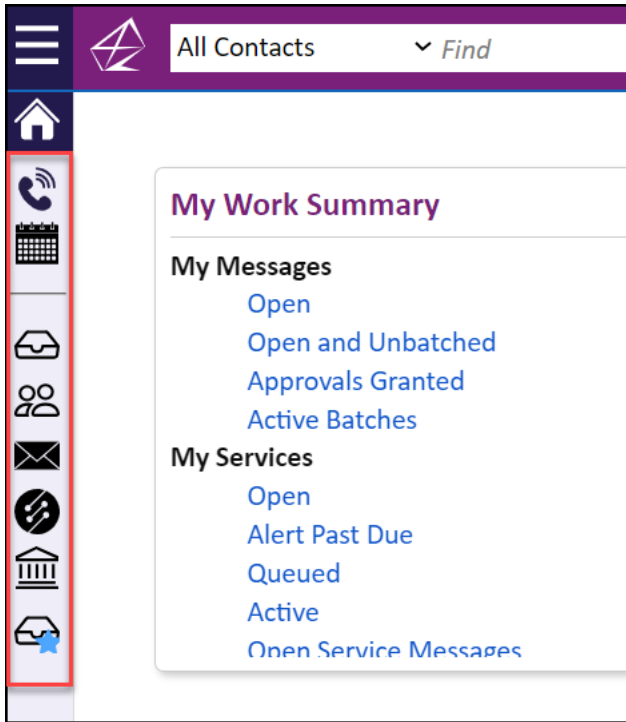
1. Click on your initial in the upper right-hand corner. Then, select the  icon.



2. Add your preferences in the different Tabs. Click **Done** to save your changes.



- a. **General:** Allows you to:
  - i. Change your start in feature (your landing page in IQ),
  - ii. The color theme of your IQ5, and how many squares wide your menu will be when switching applications,
  - iii. Choose to open or hide the views menu when changing features,
  - iv. Permanently maximize the width of the record detail panel when viewing single records,
  - v. You can select “Quick Actions” to pin actions to the action bar,
  - vi. You can also add different IQ5 Applications as additional “Quick actions” as shown above.
  - vii. You can also save Favorites to the action bar as well. This will allow you to access these actions, apps, and favorites at any time from the left-hand side of your screen:



- viii. You can select users to “act as” your role,
  - ix. You can also choose to act as another user in your office, if given access.
- b. **Messages:** Allows you to choose to include CSZ in messages lists, include the Congressional District in Message lists or include the incoming message in message lists.
  - c. **Services:** Allows you to add a default Service type when creating a new Service and to add any Services as their own Applications in the IQ5 menu.
  - d. **Library:** Allows you to set a default directory for new Form Letters to be saved, as well as selecting a default Form Letter template.
  - e. **Events:** Allows you to set default settings when creating new events, including which calendars the new event will be saved to and the duration of new events.
  - f. **Outlook:** Allows you to connect to an external email address.