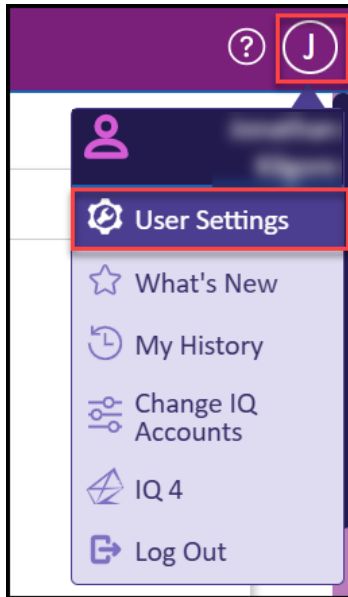


Setting Default & Preferred Service Templates

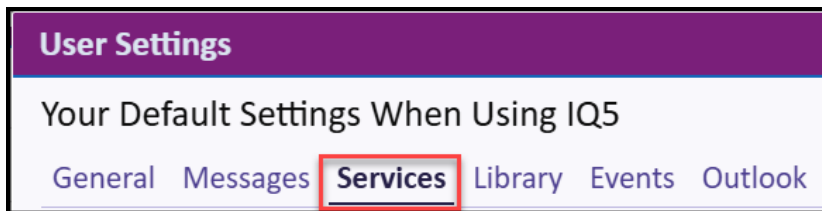
Market: House, Senate

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), 'Library', 'Events', and 'Outlook'. There are five category buttons: 'Academies (Military Academy Nominations)', 'Casework (Casework)', 'Flags (Flag Request (Web - Pay.gov))', 'Grants (Projects & Grants)', and 'Scheduling (Scheduling Requests)'. Under the 'Service Applications' section, there is a sub-section 'Default Template for New Services' with the label 'Casework'. Two checkboxes are listed: 'Expand UDF section in Service Lists' (unchecked) and 'Display address of attached Contacts in reading pane' (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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