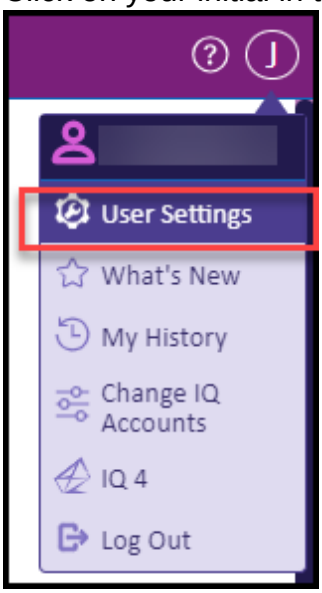
IQ5 User Settings

Market: House, Senate

Description: These instructions teach users how to set their User Settings 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.

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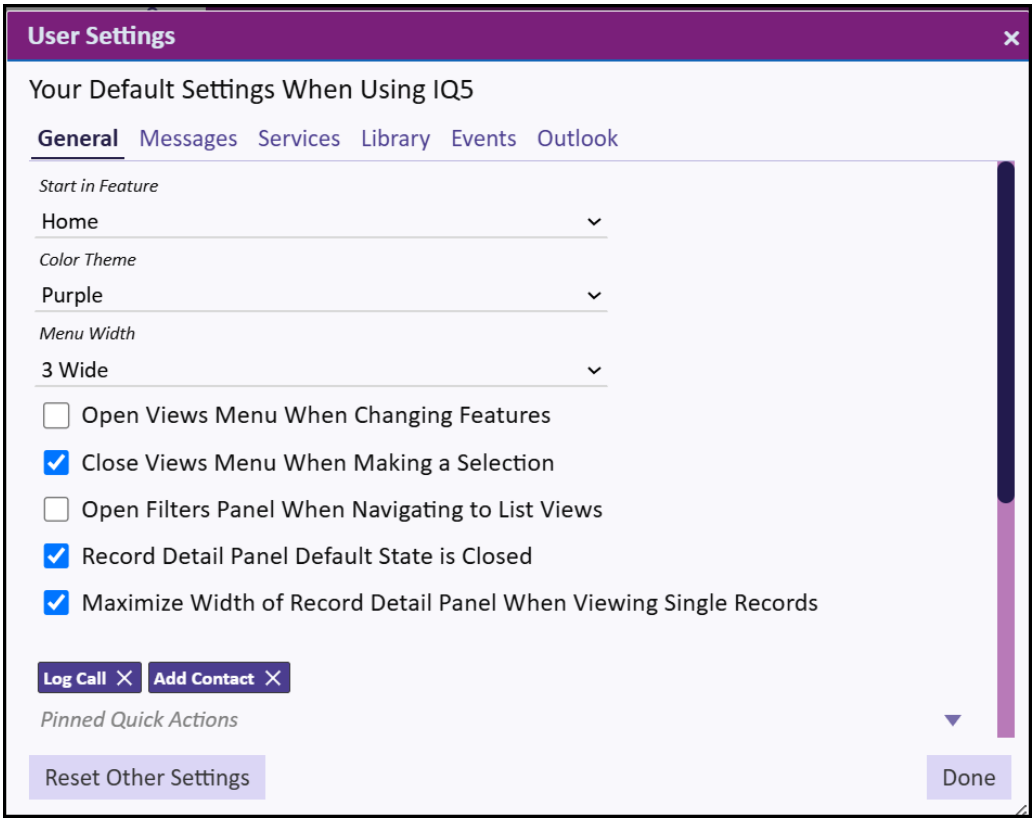

a. **General:** Allows you to:
   i. Change your start in feature (your landing page in IQ)
   ii. The color theme of your IQ5, and how many squares wide your menu will be when switching applications
   iii. Choose to open or hide the views menu when changing features
   iv. Choose to automatically Open the filters panel when navigating to View
   v. Choose to ensure the Record Detail Panel is closed by default
   vi. Choose to permanently maximize the width of the record detail panel when viewing single records
   vii. You can select “Quick Actions” to pin actions to the action bar
   viii. You can also add different IQ5 Applications as additional “Quick actions” as shown above
   ix. 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:

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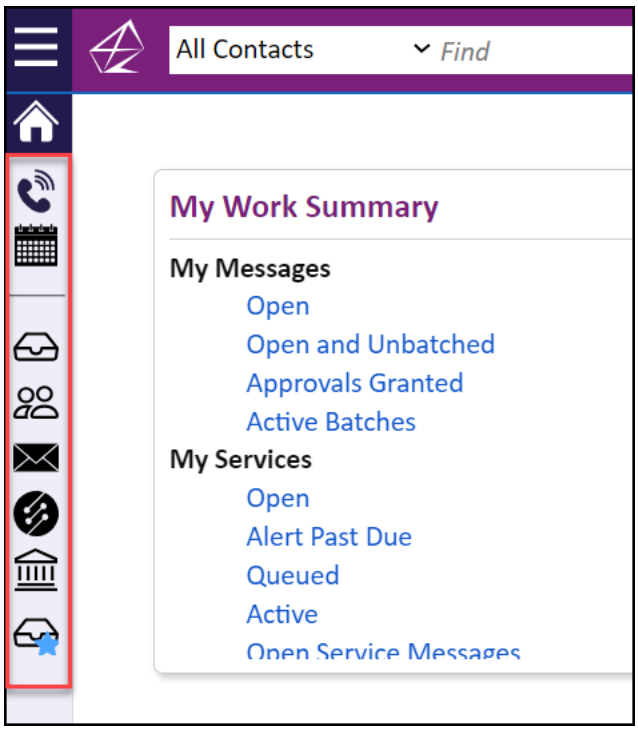

x. You can select users to “act as” your role
xi. You can also choose to act as another user in your office, if given access

b. **Messages:** Allows you to choose to include the Congressional District in Message lists or include the incoming/outgoing message in message lists.
c. **Services:** Allows you to add any Services as their own Applications in the IQ5 menu, add a default Service type when creating a new Service, choose if the UDF section in Service lists should be automatically expanded, choose whether or not to display the address of attached Contacts in the reading pane.
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 your Outlook email account to IQ5.

3. **Reset Other Settings** allows you to reset or clear particular application settings as shown below:

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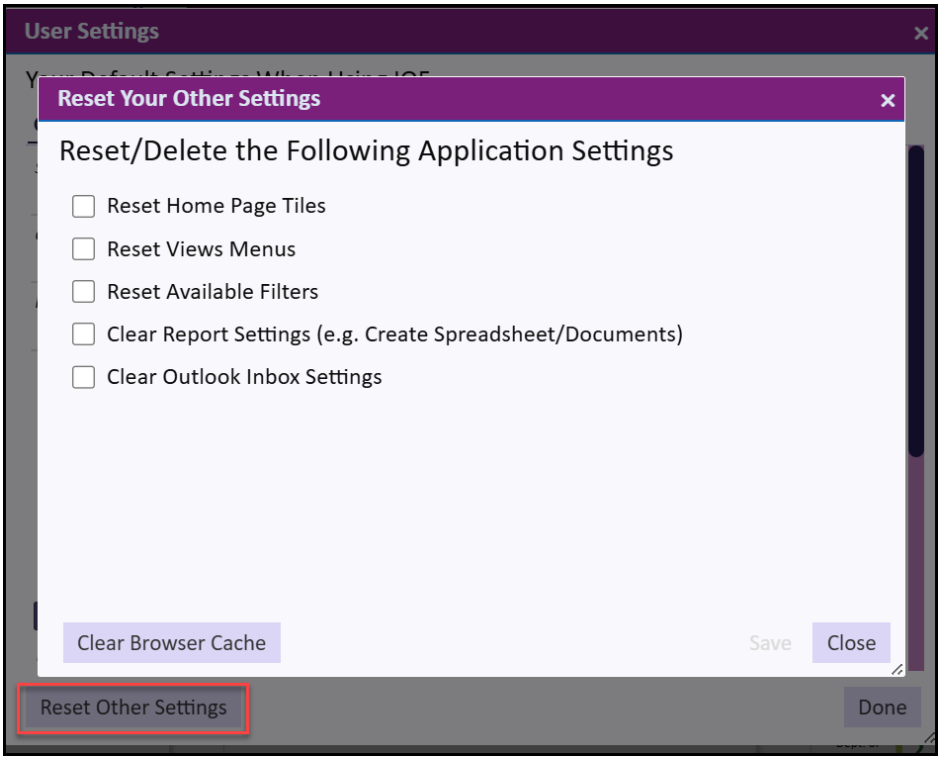

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