

Applying Personal Tags to IQ Records


Market: Federal/State/Local, House, Senate

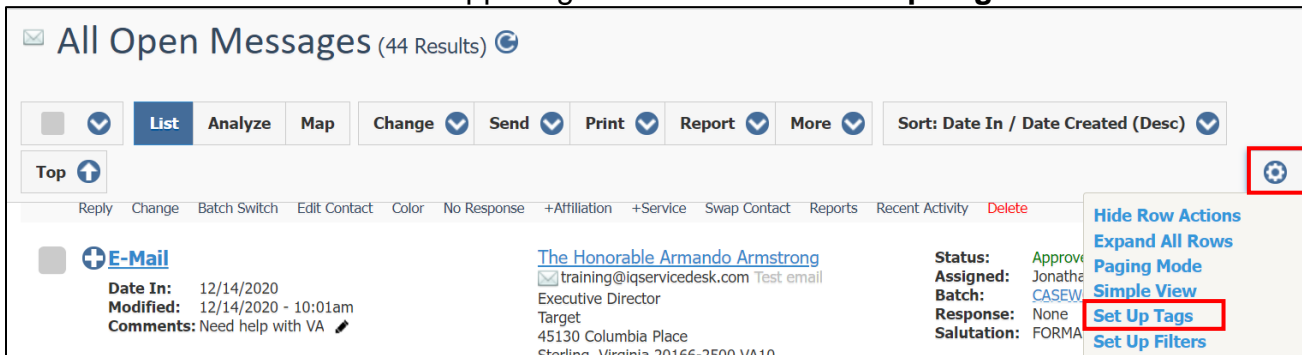
Description: In IQ, you can create tags that you can apply to IQ records. These tags are visible only to you. This enables you to further sort and analyze records or files based on your specific needs.

These instructions teach users how to create and apply personal tags.

Creating and Applying Personal Tags

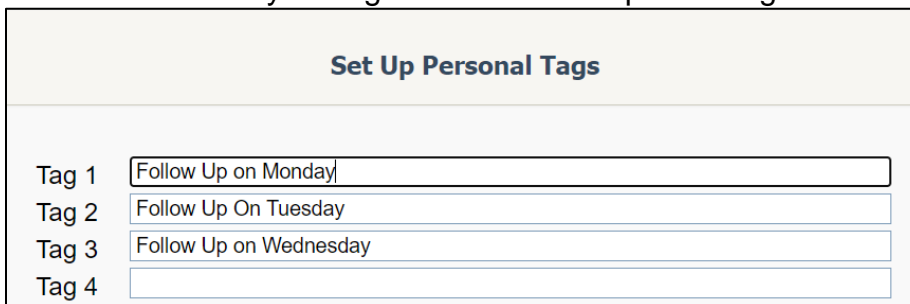
1. Navigate to the set of records that you want to apply your personal tags. In this example only, we are using **Messages > All Open**.

2. Click the Gear icon  at the upper right corner. Select **Set Up Tags**.



The screenshot shows the 'All Open Messages' interface with 44 results. At the top right, there is a gear icon highlighted with a red box. Below the message list, a context menu is open, and the 'Set Up Tags' option is highlighted with a red box. The message details for 'The Honorable Armando Armstrong' are visible, including contact information and status.

3. Enter the name of your tag. You can enter up to 20 tags.



The 'Set Up Personal Tags' form contains four input fields:

- Tag 1: Follow Up on Monday
- Tag 2: Follow Up On Tuesday
- Tag 3: Follow Up on Wednesday
- Tag 4: (empty)




4. Click **Save and Exit**.

5. Notice that all the records now display the personal tags you created. Select the tag that you want to apply for that record



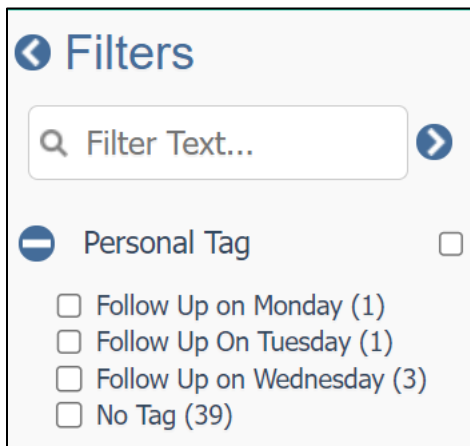
The record now displays the following tags: **Follow Up on Monday**, **Follow Up On Tuesday**, and **Follow Up on Wednesday**.

6. The record will reflect selected personal tag.

<p> E-Mail</p> <p>Date In: 12/14/2020 Modified: 12/14/2020 - 10:01am Comments: Need help with VA </p> <p>Tag: Follow Up on Monday x</p>	<p>The Honorable Armando Armstrong  training@iqservicedesk.com Test email Executive Director Target 45130 Columbia Place Sterling, Virginia 20166-2500 VA10 Business: (22) 333-7890 <i>Very Important Person</i></p>	<p>Status: Approved E-Mail Assigned: Jonathan Kilgore Batch: CASEWORK MESSAGES Response: None Salutation: FORMAL - Honorable Armstrong</p>
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Filtering Records Based on Personal Tag

1. Navigate to the set of records that you want to view. Continuing with the same example, navigate to **Messages > All Open**.
2. Navigate to **Filters > Personal Tag**. Check the box of the personal tag you to view the records associated with it.



Filters

Filter Text...

Personal Tag

- Follow Up on Monday (1)
- Follow Up On Tuesday (1)
- Follow Up on Wednesday (3)
- No Tag (39)