
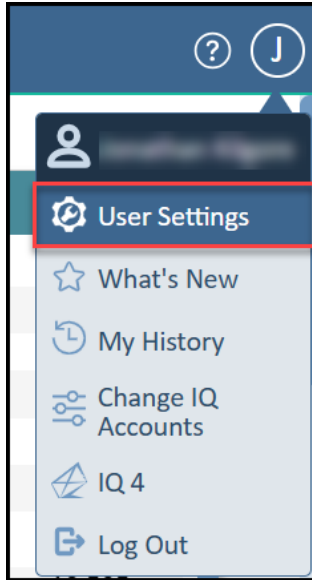


IQ5 User Settings

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.

User Settings

Your Default Settings When Using IQ5

General Messages Services Library Events Outlook Discussions

Start in Feature
Home

Color Theme
Default Blue

Menu Width
3 Wide

☐ Open Views Menu When Changing Features

☒ Close Views Menu When Making a Selection

☐ Open Filters Panel When Navigating to List Views

☒ Record Detail Panel Default State is Closed

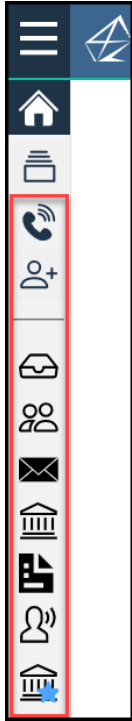
☒ Maximize Width of Record Detail Panel When Viewing Single Records

Log Call Add Contact

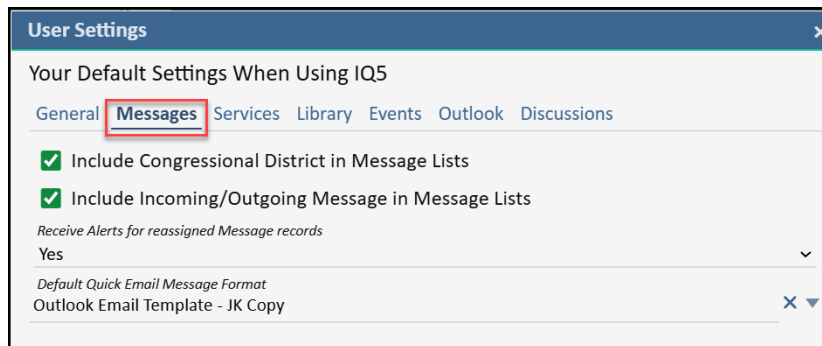
Pinned Quick Actions

Reset Other Settings Done

- 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:



- 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:
- i. Choose to include the Congressional District in Message lists
 - ii. Include the incoming/outgoing message in message lists.
 - iii. Choose Yes or No to receive Alerts for reassigned Message Records
 - iv. Select your default Quick Email Message Format
 - 1. **Note:** This user setting impacts users sending Custom Responses from within a Service.



- c. **Services:** Allows you to:
- i. Add any Services as their own Applications in the IQ5 menu
 - ii. Add a default Service type when creating a new Service
 - iii. Choose if the UDF section in Service lists should be automatically expanded

- iv. Choose whether or not to display the address of attached Contacts in the reading pane.
- v. Choose whether or not to hide the Address section when viewing Service lists.
- vi. Choses whether or not to hide the Service Code section when viewing Service Lists

User Settings

Your Default Settings When Using IQ5

General Messages **Services** Library Events Outlook Discussions

Grants (Projects & Grants) X Casework (Casework) X

Service Applications

Default Template for New Services Casework X

Flag Request (Web - Pay.gov) X Meetings X Scheduling Requests X Tour Request X Casework X

Preferred Templates

☐ Expand UDF section in Service Lists

☒ Display address of attached Contacts in reading pane

☐ Hide Address section in Service Lists

☐ Hide Service Code section in Service Lists

Reset Other Settings Done

d. **Library:** Allows you to:

- i. Set a default directory for new Form Letters to be saved
- ii. Select a default Form Letter template to be used when creating new Form Letter Templates.

User Settings

Your Default Settings When Using IQ5

General Messages Services **Library** Events Outlook Discussions

Default Directory for New Form Letters Form Letters X

Default Form Letter Format for New Form Letters Outlook Email Template - JK Copy X

e. **Events:** Allows you to:

- i. Choose which Calendar is your default Calendar under **View This Calendar**.
- ii. Choose whether or not to open the Events application in the Calendar View by default.
- iii. Set default settings when creating new events, including which calendars the new event will be saved to and the duration of new events.
- iv. Choose the default Service template to be used for New Event Services.

User Settings

Your Default Settings When Using IQ5

General Messages Services Library **Events** Outlook Discussions

View This Calendar
Jonathan Kilgore

☐ Start in Calendar View

Jonathan X Meetings X Joy X

Add New Events to These Calendars

Status for New Events
Approved

Timezone for New Events
ET

Add to Ending Time for New Events
60 Minutes

Default Template for New Event Services
Scheduling Requests

Reset Other Settings Done

f. **Outlook:** Allows you to:

- i. Connect your Outlook 365 email account to IQ5, enabling use of Office 365 features within My Inbox, Services, and the Library Applications.
- ii. Configure Shared Outlook Inboxes for Offices that want to be able to see the same outlook account information.

User Settings

Your Default Settings When Using IQ5

General Messages Services Library Events **Outlook** Discussions

My Outlook Email Address
[redacted]@onmicrosoft.com

Get Access Token

Configure Shared Outlook Inboxes

g. **Discussions:** Allows you to:

- i. Enable showing Discussion notifications when viewing a record where a Discussion alert has been sent but not viewed.

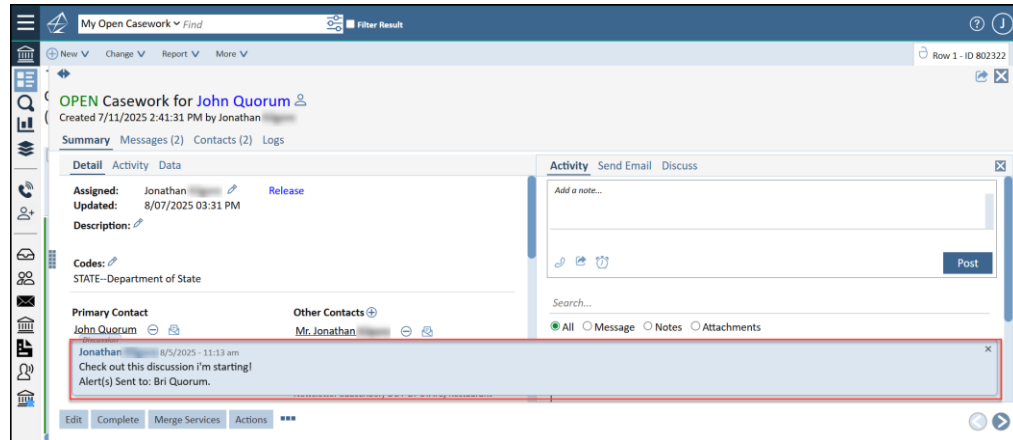
User Settings

Your Default Settings When Using IQ5

General Messages Services Library Events Outlook **Discussions**

☒ Show discussion notifications on other tabs of applicable records

Ex:



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

