How to Create, View, Modify and Remove Favorite Searches

Market: House, Senate

Description: These instructions teach users how to save IQ records as **Favorites** so they can access them more quickly.

> **Note: Favorites** refer to a link to a set of records that users have saved so they can easily access them. The set of records shown in each of your **Favorites** may change over time as new records that meet the Favorites criteria are added to and/or existing records that no longer meet the criteria are removed from your **Favorites**.

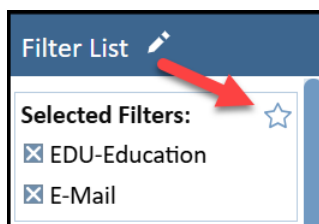Click the following link(s) to be brought directly to the subtopic:

[*Viewing a Favorite*](#)

[*Modifying a Favorite Name*](#)

[*Removing a Favorite*](#)

Creating a Favorite

1. Within the IQ Tool, search for the set of records that you want to save using filters.
2. Under the Filter List in the left-hand column, navigate to the top and click the ☆ icon **(the Favorites icon)**.

3. The **Favorite View** window appears on the screen. In the **Title** field, enter a name for the list. In the **Description** field, enter a description. Click **Save.**

Favorite View

Save to Menu's My Favorite Views Section
With Selected Filters

Title
All Open Unbatched Education Emails
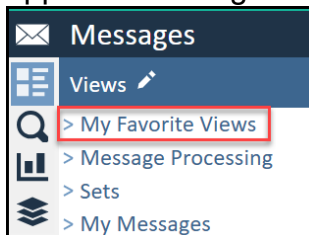
Description
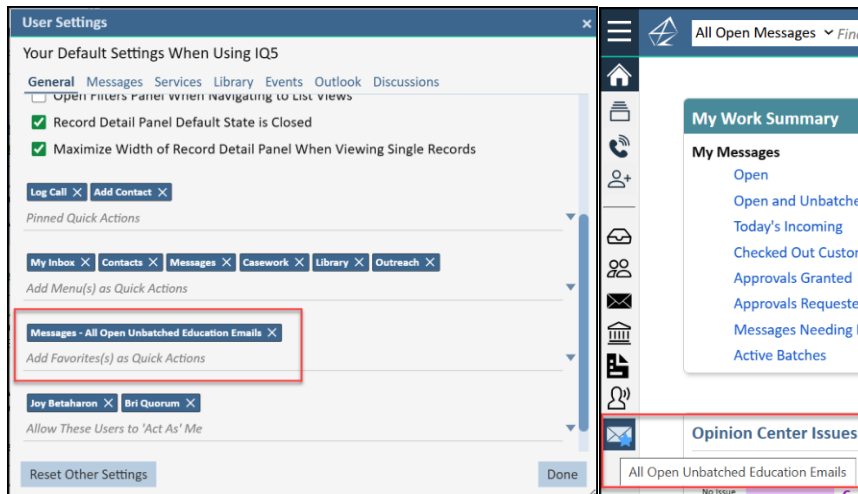Example of a Saved Favorite

[Save and View]   [Save] [Close]

Viewing a Favorite

1. **Favorites** are saved in the application in which it was created. Navigate to the appropriate application and go to the **Views** list and make a selection in the My Favorite Views.

2. **Favorites** can also be **pinned to the Action Icon Bar** by navigating to the **User Settings** and clicking into the dropdown named **Add Favorite(s) as Quick Actions**. This allows you to access your favorites with one click from the Action Icon Bar.

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Modifying a Favorite Name

1. Navigate to the Filter list within the application. In the **Selected Filters** section, click the ⭐ icon.

2. The **Favorite View** window will open. Make the necessary edits and then click the **Save** button.

Favorite View   ✕

Save to Menu's My Favorite Views Section
With Selected Filters

Title

All Open Unbatched Education Emails - Modified

Description

Example of a Saved Favorite

Make Copy   Copy to Users   Delete Favorite   Save   Close

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Removing a Favorite

1. Click on the ✏ icon next to **Views** in the Application where your favorite is. .

2. Your list of **Views** will open. Click **Edit Favorite** Views.

Edit Views Options   ✕

Available List Views for Messages
Check/Uncheck to Add/Remove Options from the Messages
Views Menu
Drag with mouse to change display order.

☐ My Custom Checked Out
☐ Messages Replied
☐ Messages Open
☐ Messages Close As Duplicate
☐ Messages Close With No Response

Grouped Under: Message Processing

☐ Possible Red Flag
☑ Possible Requests
☑ Campaigns Without Rule
☑ Bills Without Rule

☁ Add a Tile
Tiles
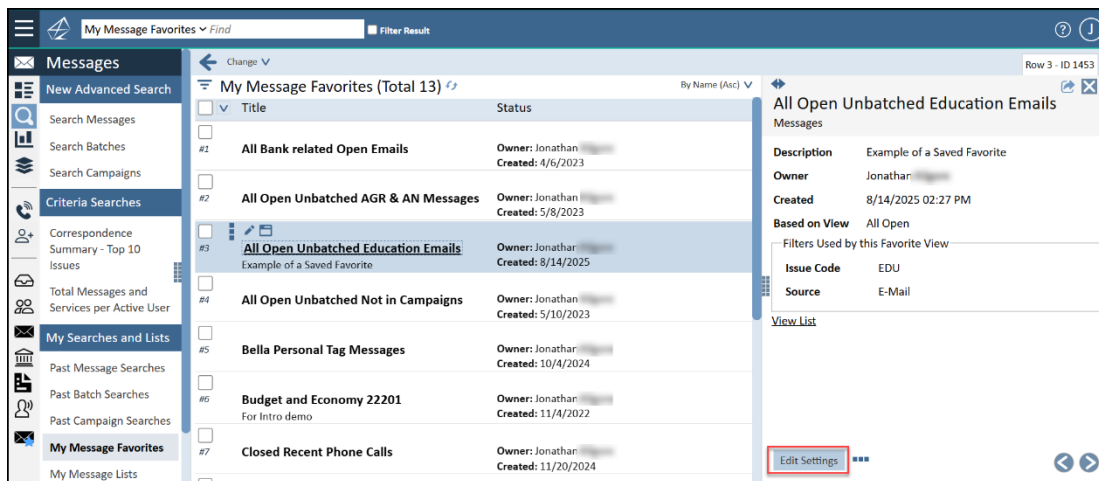Form Letters By Status   ✕ ▼
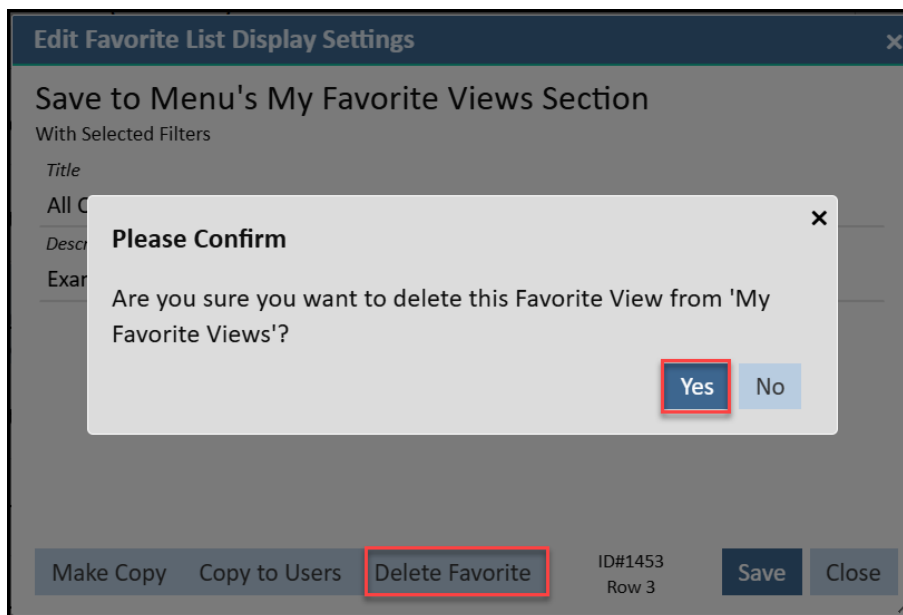
Reset to Defaults   Edit Favorite Views   Save   Cancel

3. Select the Favorite you wish to remove and click on **Edit Settings.**

4. Click **Delete Favorite.** Click the **Yes** button to confirm changes.

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