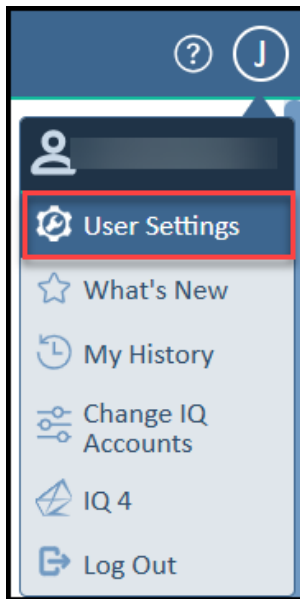# Setting Default & Preferred Service Templates
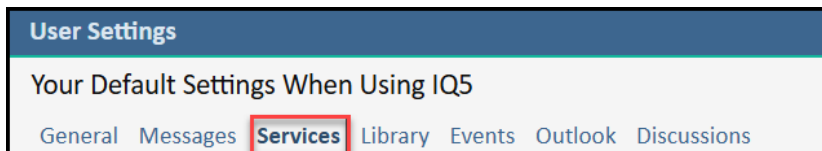
Market: House, Senate

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.

8. Click **Done**.

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