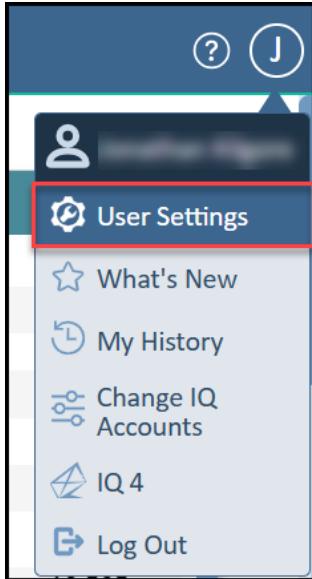


IQ5 User Settings

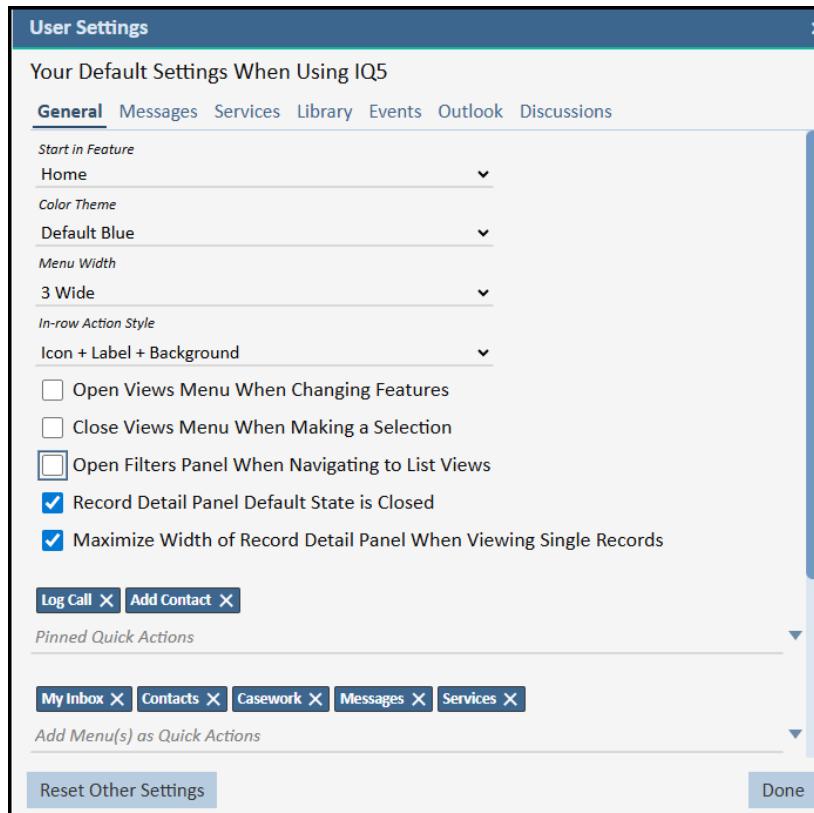
Market: House, Senate

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.

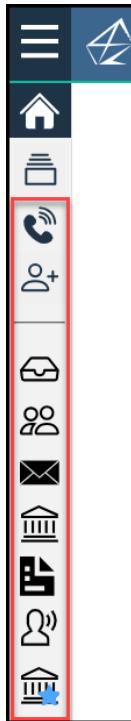


2. Add your preferences in the different Tabs. Click **Done** to save your changes.



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. Adjust the menu width
- iv. Select an option for viewing In-row Action icons
- v. Choose to open or hide the views menu when changing features
- vi. Choose to automatically close the views menu when making selections
- vii. Choose to automatically open the filters panel when navigating to list views
- viii. Choose to ensure the Record Detail Panel is closed by default
- ix. Choose to permanently maximize the width of the record detail panel when viewing single records
- x. You can select “Quick Actions” to pin actions to the action bar
- xi. You can also add different IQ5 Applications as additional “Quick actions” as shown above
- xii. 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:



- xiii. You can select users to “act as” your role
- xiv. 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.

User Settings

Your Default Settings When Using IQ5

General **Messages** Services Library Events Outlook Discussions

Include Congressional District in Message Lists
 Include Incoming/Outgoing Message in Message Lists

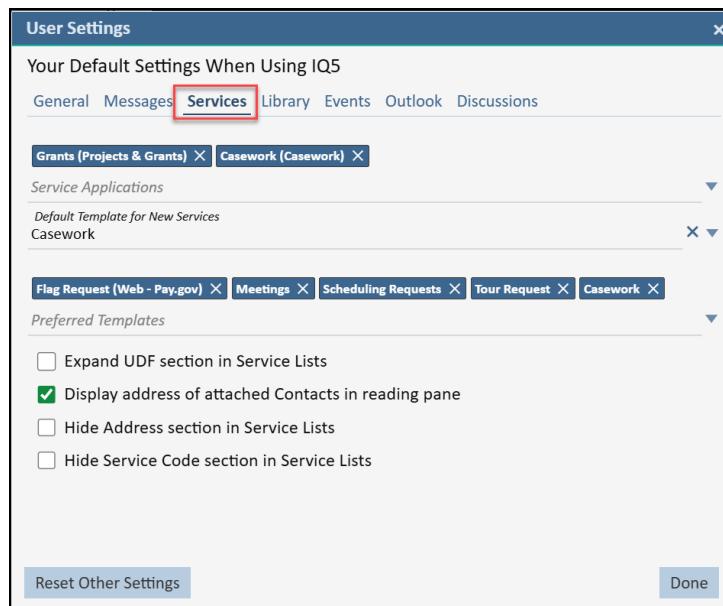
Receive Alerts for reassigned Message records
 Yes

Default Quick Email Message Format
 Outlook Email Template - JK Copy

c. **Services:** Allows you to:

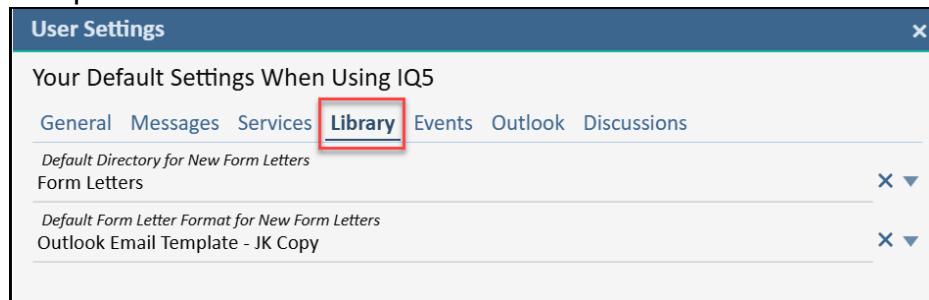
- i. Add any Services as their own Applications in the IQ5 menu
- ii. Add a default Service type when creating a new service
- iii. Select one or more templates to display when preferred templates is selected when creating a new service.

- iv. Choose if the UDF section in Service lists should be automatically expanded
- v. Choose whether or not to display the address of attached Contacts in the reading pane.
- vi. Choose whether or not to hide the Address section when viewing Service lists.
- vii. Choose whether or not to hide the Service Code section when viewing Service Lists



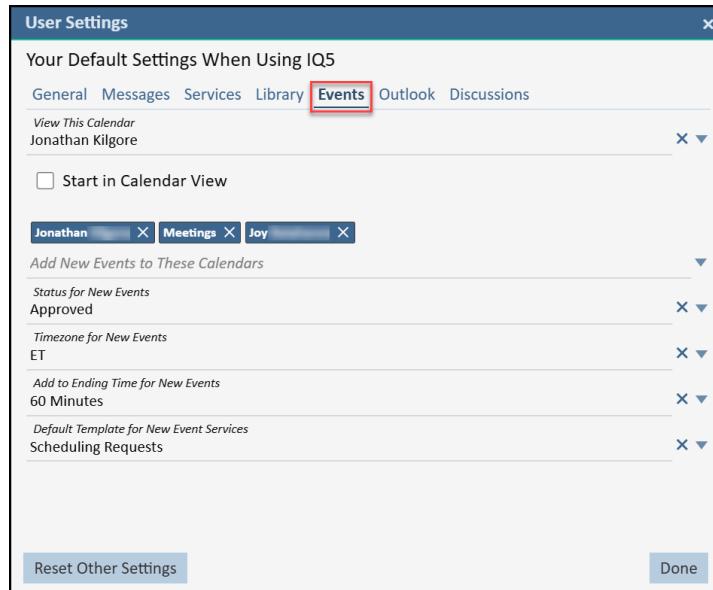
d. **Library:** Allows you to:

- 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.



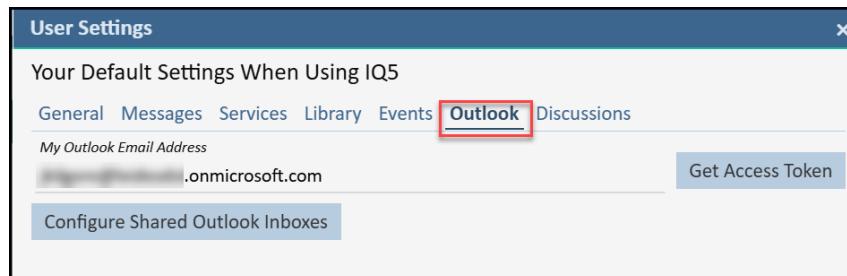
e. **Events:** Allows you to:

- 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.



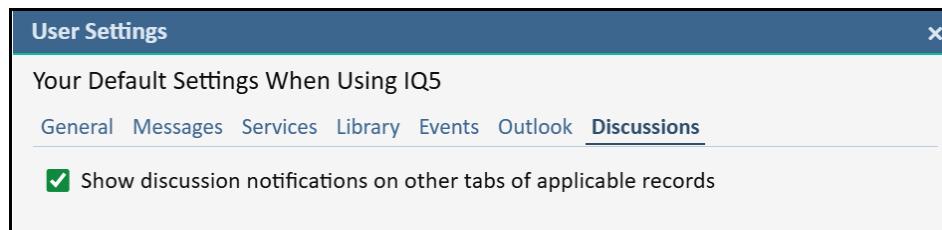
f. **Outlook:** Allows you to:

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

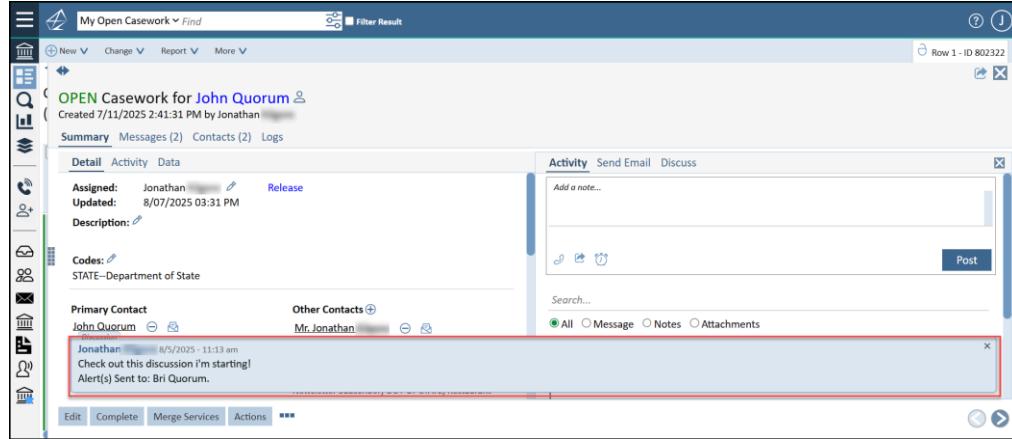


g. **Discussions:** Allows you to:

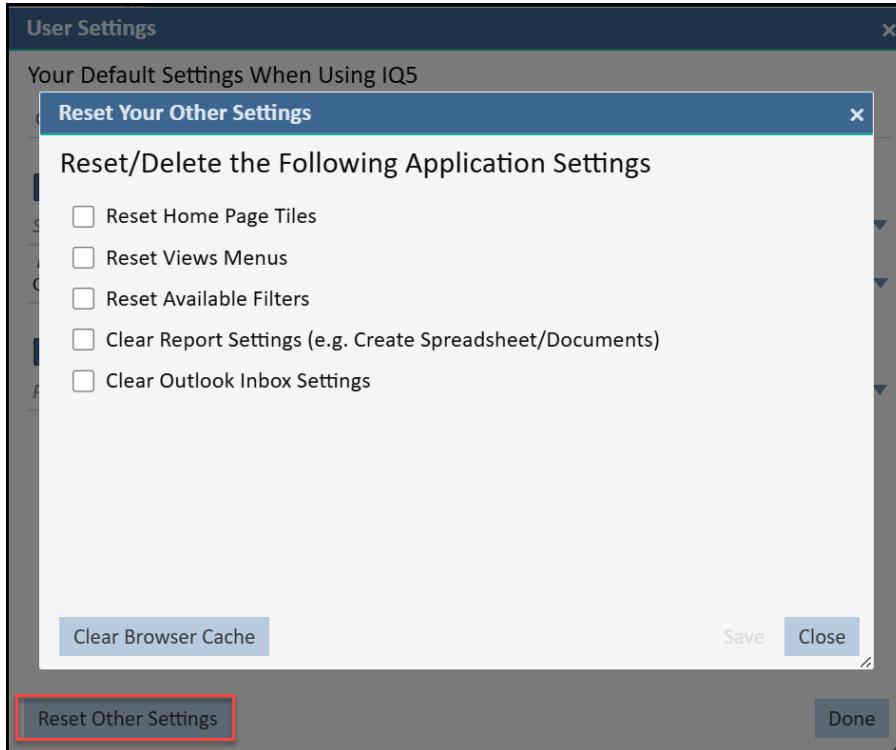
- Enable showing Discussion notifications when viewing a record where a Discussion alert has been sent but not viewed.



Ex:



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



User Settings

Your Default Settings When Using IQ5

Reset Your Other Settings

Reset/Delete the Following Application Settings

Reset Home Page Tiles
 Reset Views Menus
 Reset Available Filters
 Clear Report Settings (e.g. Create Spreadsheet/Documents)
 Clear Outlook Inbox Settings