

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 the search/filter criteria is dynamic and results are based on the most current executed search/filter.

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

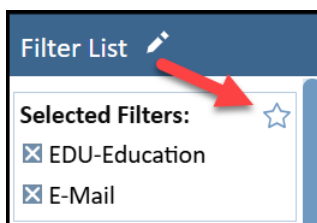
[Viewing a Favorite](#)

[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

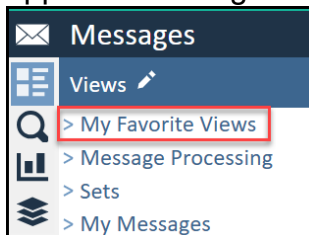
Save and View

Save

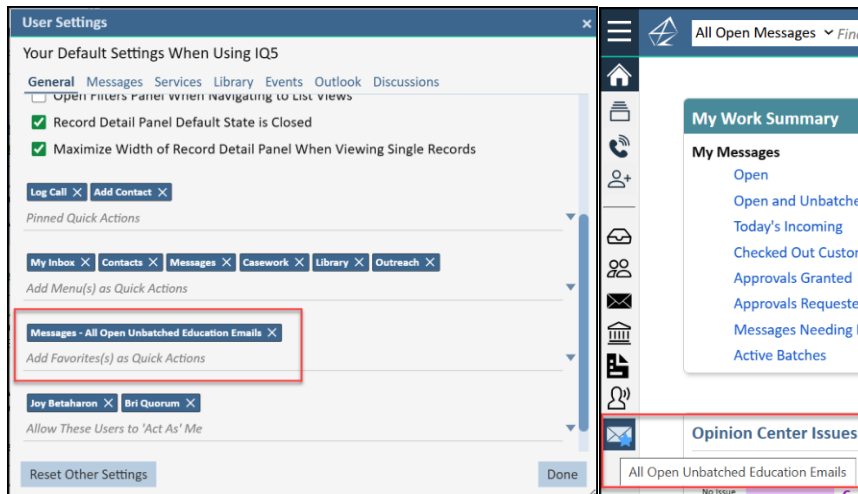
Close

Viewing a Favorite

- 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.




- 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.



[Top of Page](#)

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

[Top of Page](#)

Removing a Favorite

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

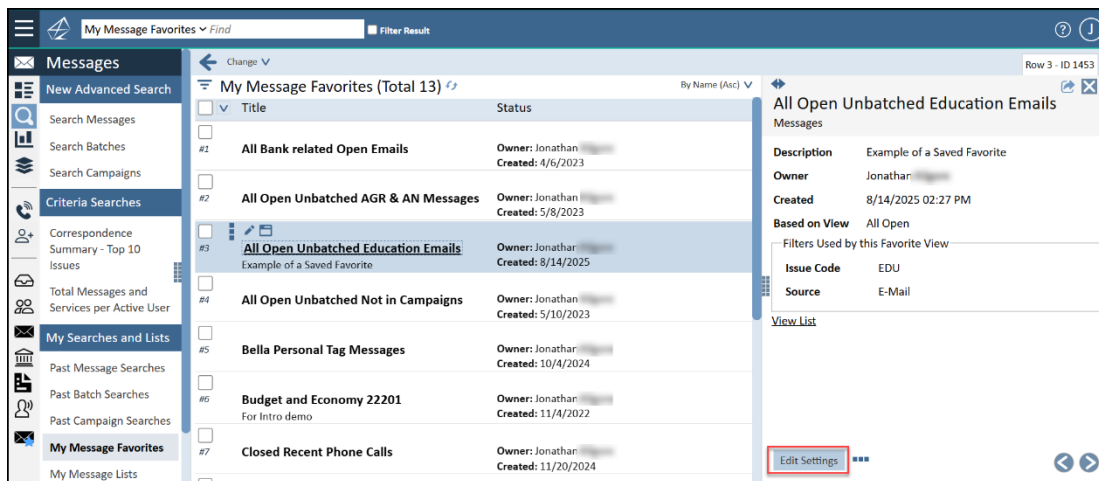
Reset to Defaults

Edit Favorite Views

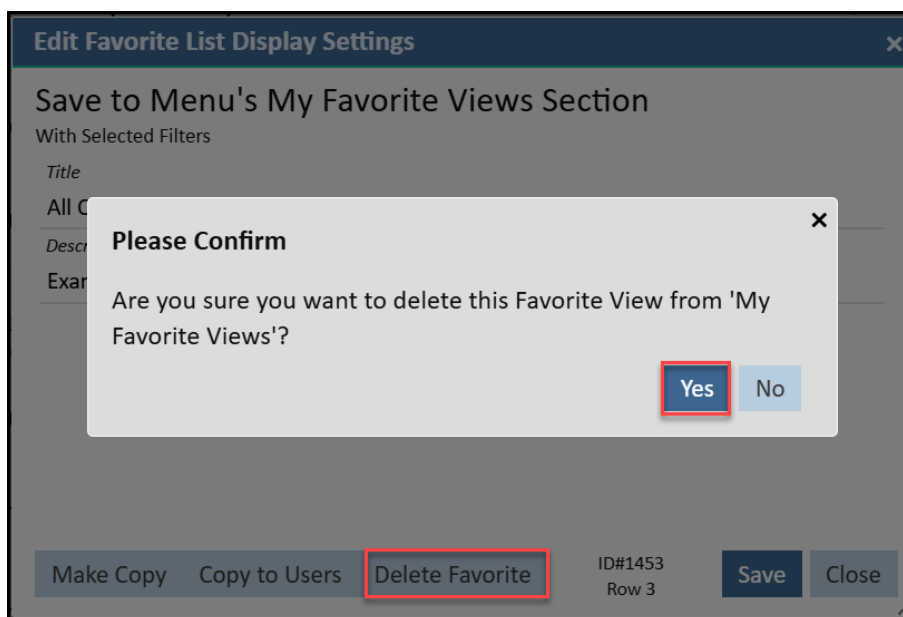
Save

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.



[Top of Page](#)