

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:

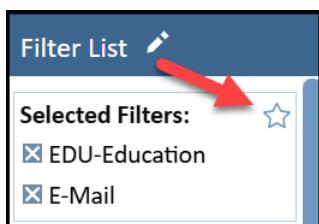
[Viewing a Favorite](#)

[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

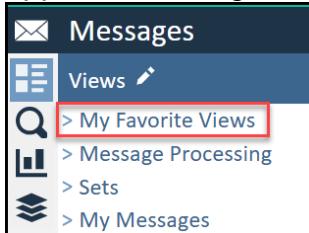
Title
All Open Unbatched Education Emails

Description
Example of a Saved Favorite

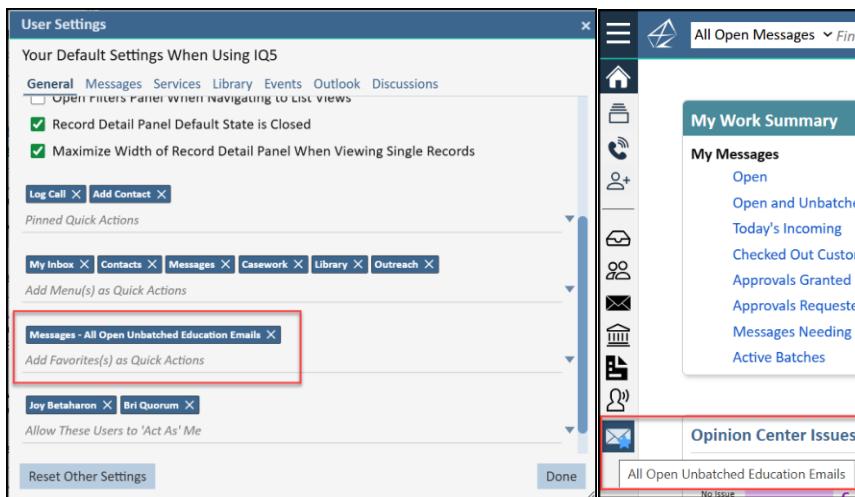
Save and View **Save** **Close**

Viewing a Favorite

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.



User Settings

Your Default Settings When Using IQ5

General Messages Services Library Events Outlook Discussions

Record Detail Panel Default State is Closed

Maximize Width of Record Detail Panel When Viewing Single Records

Log Call Add Contact

Pinned Quick Actions

My Inbox Contacts Messages Casedwork Library Outreach

Add Menu(s) as Quick Actions

Messages - All Open Unbatched Education Emails Add Favorites(s) as Quick Actions

Joy Betaharon Bri Quorum

Allow These Users to 'Act As' Me

Reset Other Settings Done

All Open Messages Find

My Work Summary

My Messages

Open

Open and Unbatched

Today's Incoming

Checked Out Custom

Approvals Granted

Approvals Requested

Messages Needing My Attention

Active Batches

Opinion Center Issues

All Open Unbatched Education Emails

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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 X

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

Edit Views Options X

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

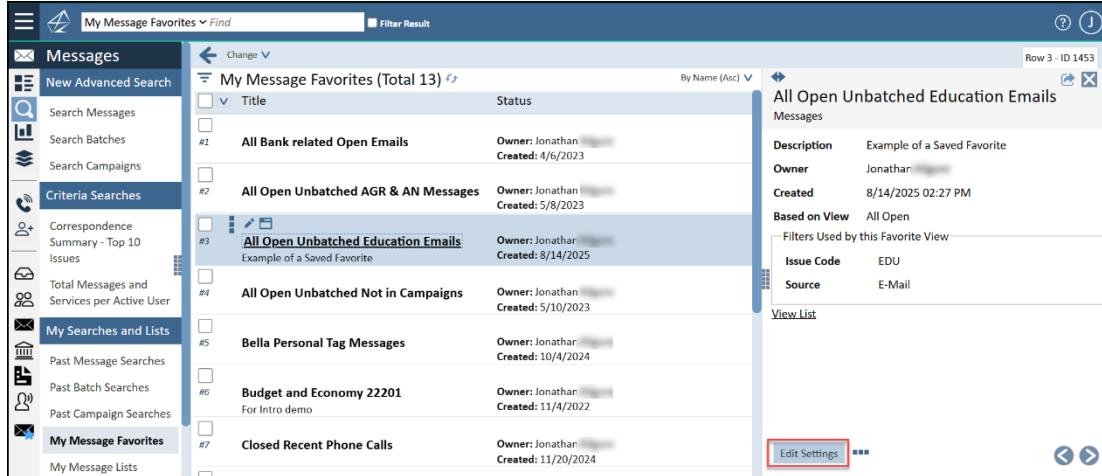
Possible Red Flag
 Possible Requests
 Campaigns Without Rule
 Bills Without Rule

 [Add a Tile](#)

Tiles
Form Letters By Status

[Reset to Defaults](#) Edit Favorite Views [Save](#) [Cancel](#)

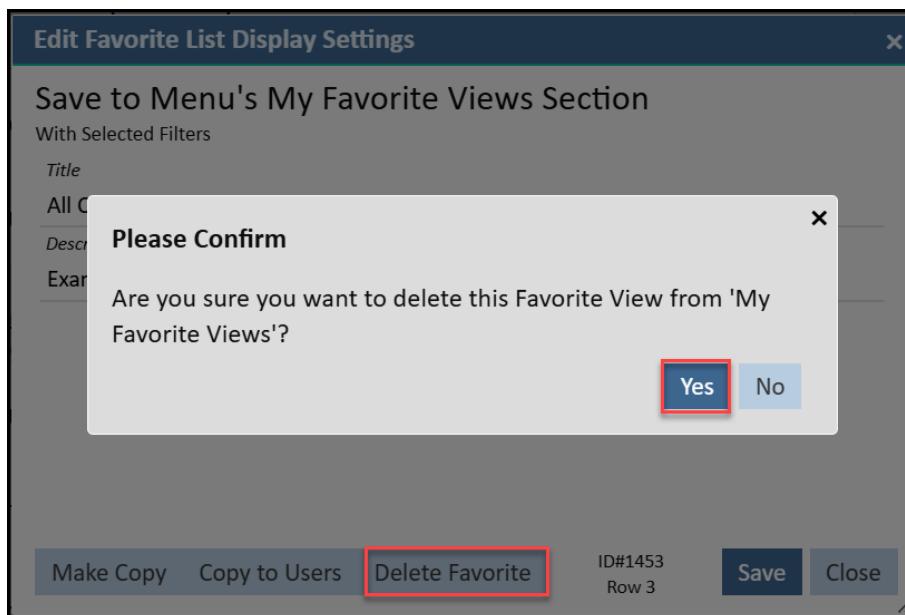
3. Select the Favorite you wish to remove and click on **Edit Settings**.



The screenshot shows a list of message favorites. The 'Edit Settings' button for the 'All Open Unbatched Education Emails' favorite is highlighted with a red box.

Rank	Title	Status
#1	All Bank related Open Emails	Owner: Jonathan Created: 4/6/2023
#2	All Open Unbatched AGR & AN Messages	Owner: Jonathan Created: 5/8/2023
#3	All Open Unbatched Education Emails	Owner: Jonathan Created: 8/14/2025
#4	All Open Unbatched Not in Campaigns	Owner: Jonathan Created: 5/10/2023
#5	Bella Personal Tag Messages	Owner: Jonathan Created: 10/4/2024
#6	Budget and Economy 22201	Owner: Jonathan Created: 11/4/2022
#7	Closed Recent Phone Calls	Owner: Jonathan Created: 11/20/2024

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



The screenshot shows a confirmation dialog box asking if the user wants to delete the favorite view. The 'Yes' button is highlighted with a red box.

Edit Favorite List Display Settings

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

Please Confirm

Are you sure you want to delete this Favorite View from 'My Favorite Views'?

Yes **No**

Buttons at the bottom: Make Copy, Copy to Users, **Delete Favorite** (highlighted with a red box), ID#1453 Row 3, Save, Close.

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