

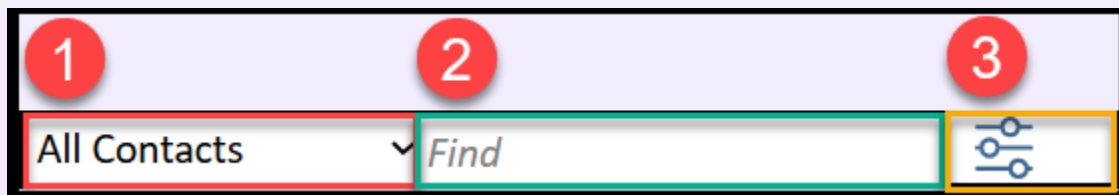
Utilizing the IQ5 Search Bar

Market: House, Senate

Description: These instructions teach users how to use the Search Bar to find records quickly among Contacts, Messages, Services, and Form Letters.

Search Bar Break Down

Use the screenshot below to see the different areas of the Search Bar defined.



1. Dropdown Search Selection:

- a. This section updates to show you what group of records you are searching among. This should default to whatever View (list of records) you have selected. From the Home Page the default is All Contacts. Click into the dropdown at anytime to change the group of records you are searching amongst.

2. Text Search area:

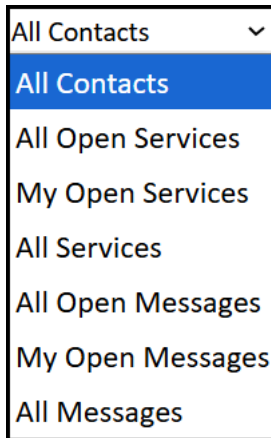
- a. Use this area to type what you would like to search.

3. More Search Options:

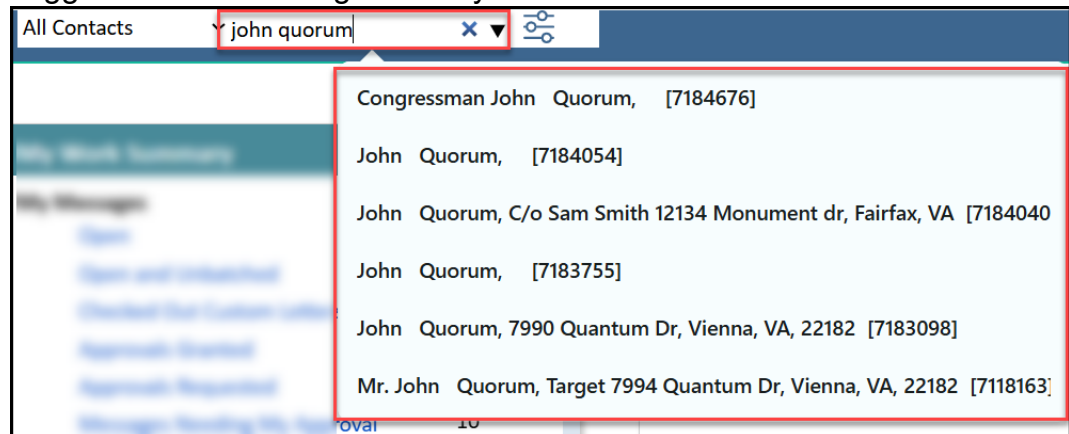
- a. Click this option to see additional search characteristics.

Contact Searching

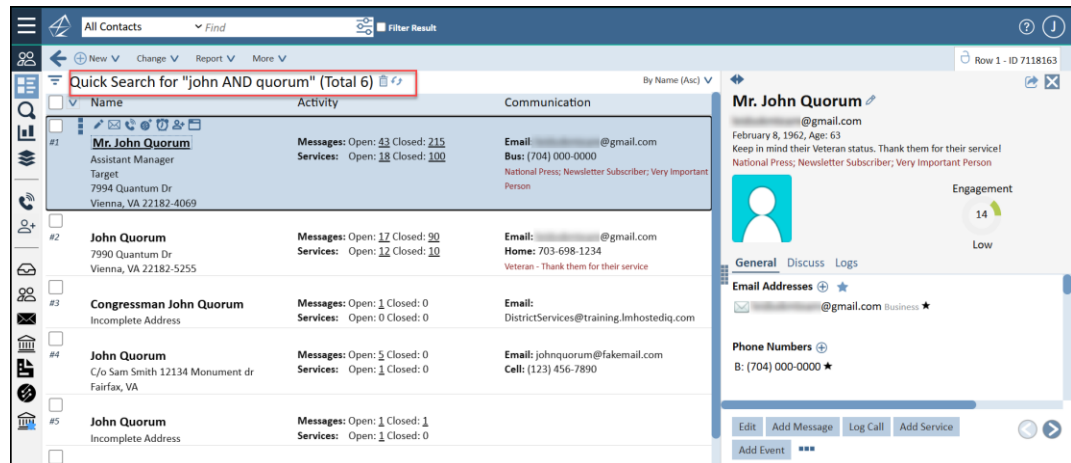
1. Choose in the Dropdown Search area where you want to search for Contacts (All Contacts, Contacts with Open/Closed Messages, Contacts with Open/Closed Services).



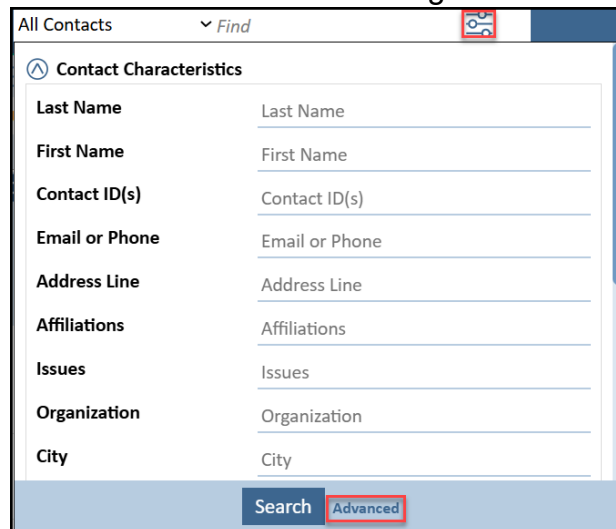
2. In the Text Search area, you can search by the following:
 - a. First and/or Last Name
 - b. Email
 - c. Phone Number
 - d. Organization
 - e. IQ Contact ID#
3. Type in your text and then either:
 - a. Wait and IQ will suggest potential record matches. Click on one of these suggestions to be brought directly to that record.



- b. Hit the enter key and be brought to a list of results for that search.

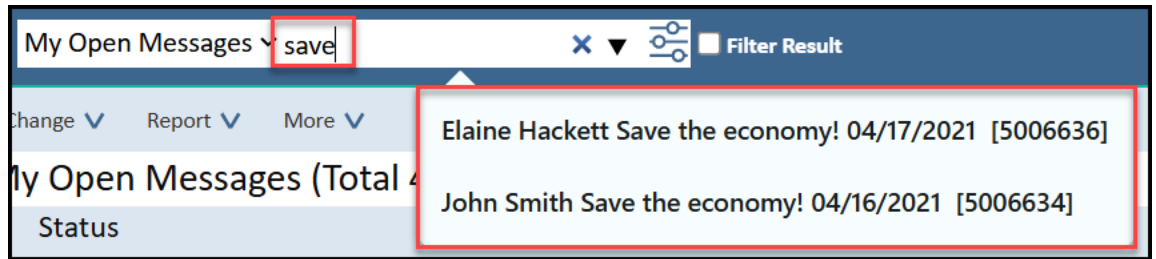


4. If needed, click on More Search Options to search by particular characteristics or a combination of characteristics.
 - a. Click on Advanced to be brought to the Advanced Search page.

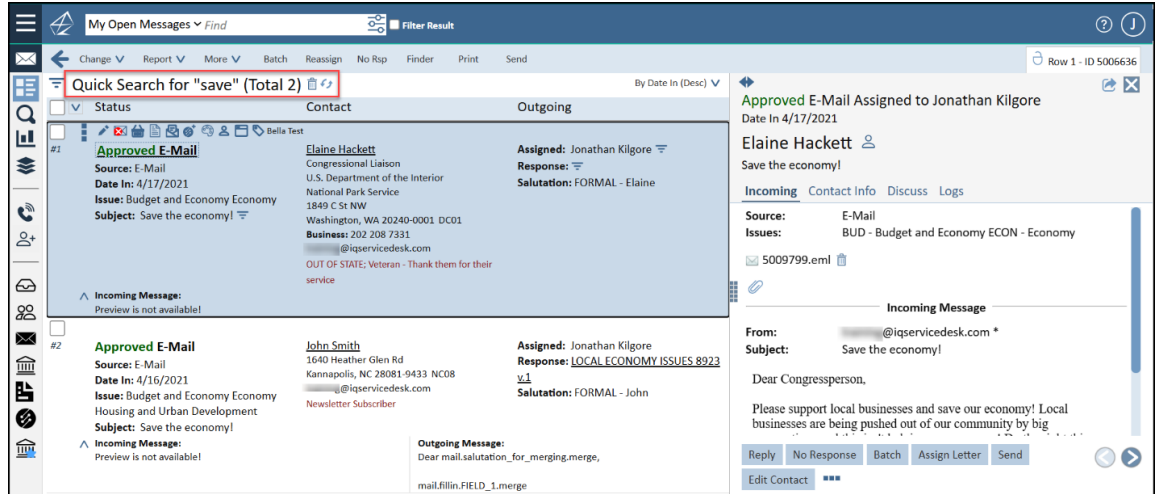


Message Searching

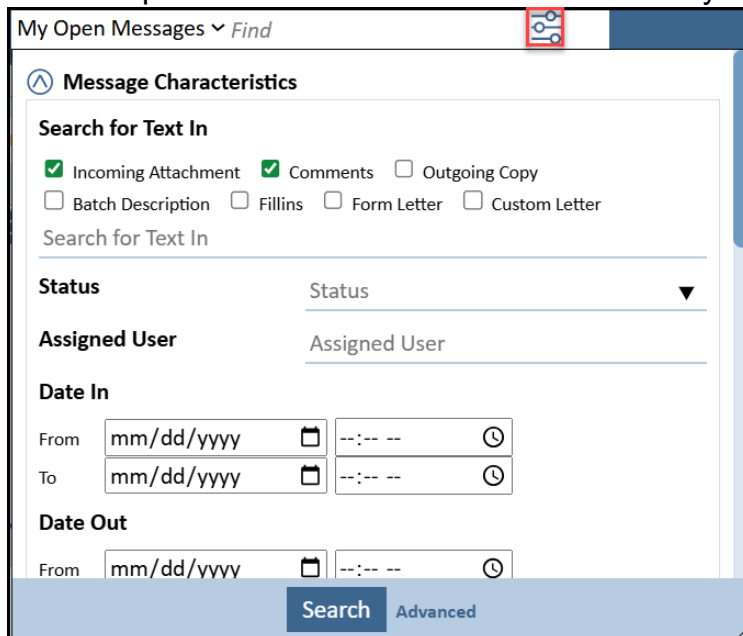
1. Click to access the View with the Messages that you want to search, such as My Messages.
2. To search for Key Words in Email text and subject lines, type in your text in the Text Search Area. Then either:
 - a. Wait for suggested options to appear. Click on any one of these to be brought to that individual message.



- b. Click “enter” and you will be brought the list of email messages that match your text.



3. For more advanced searching with key words and other options, click the More Search Options icon and check the boxes where you'd like to search.



4. Refer to the following image for more information on using Key Word Text Searches (you can reference this box as a tooltip within IQ by hovering your mouse over the key word search text area within More Search Options):

The following are examples of simple text searches:

apples AND oranges AND peaches All three words must be in the text.
apples OR oranges OR peaches Any of the three words need to be in the text.
{apples oranges peaches} Use { and } brackets to search for the phrase 'apples oranges peaches'.

You can use parentheses to organize the logic of your search:

(apple AND oranges) OR fruit

You can use NOT to exclude based on a word. For instance: (apple AND oranges) NOT fruit

You can use \$ to do word stemming and % to do wildcard searches. For instance:

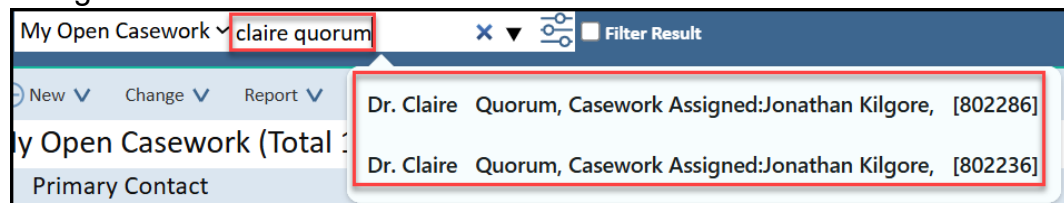
\$speak Finds words like SPEAK (SPEAK, SPEAKS, SPOKE, and SPOKEN),
appl% Finds words that begin with APPL (APPLE, APPLICATION, and APPLY)

The following words are Reserved and need quotes if you are searching on them:

AND, OR, ABOUT, NEAR, NOT, FUZZY

Services Searching

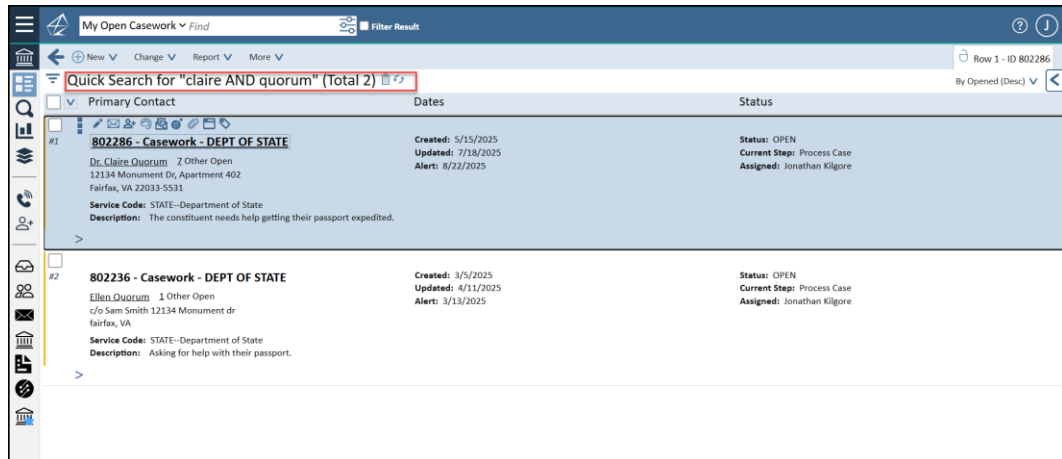
1. Click to access the View with the records you want to search for such as My Open Services.
2. Within the Text area of the search bar, you can type in the name of the Primary Contact or Other Contact you are searching for amongst the Services. Then either:
 - a. Wait for suggested options to appear. Click on any one of these to be brought to that individual Service.



The screenshot shows a search bar with the text 'My Open Casework' and a dropdown menu. The search bar contains the text 'claire quorum'. Below the search bar, there are two search results listed:

- Dr. Claire Quorum, Casework Assigned:Jonathan Kilgore, [802286]
- Dr. Claire Quorum, Casework Assigned:Jonathan Kilgore, [802236]

- b. Hit "enter" to be brought to a list of those results.



3. To search amongst the Description, UDFs, or other Service information, click on More Search Options.

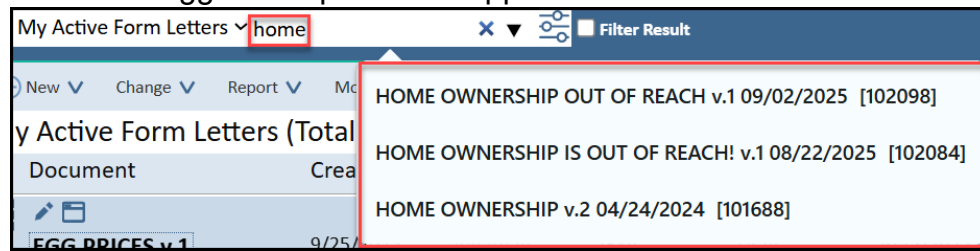
4. Refer to the image below for more information on what you can search within the Key word search area of More Search options (this information is also available as a tooltip, which appears by hovering your mouse over the text search area):

The default behavior is to return the records that contain the entered text in any of the checked fields (i.e. a wildcard is NOT needed at either the beginning or end of the entry). However, the search uses the 'Case Sensitive Yes/No' selection at the bottom of the search page. Within the searched fields (e.g. 'Description' and 'Notes'), the entered search term can also be broken into sub-phrases for within-field And/Or joins thru the use of '+' or ',' as part of the search entry (note that if the 'Delimiter Character' setting at the bottom of the search page is something other than a comma, then that character will be used as the 'Or' delimiter).

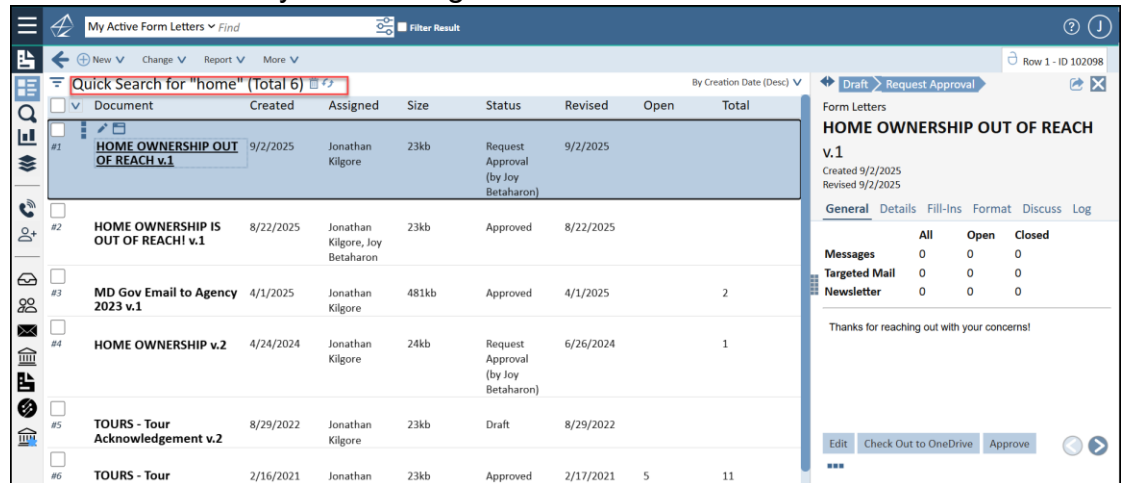
Form Letter Searching

1. Click to access the list of Form Letters you want to search, such as My Active Form Letters.

2. In the search bar type in the name of the Form Letter or key text within the Form Letter you are searching for. Then either:
 - a. Wait and suggested options will appear.



- b. Click the “enter” key to be brought to a list of those results.



3. If you need to search by other options, including text within the Letter itself or the Letter’s description, click on More Search Options.

The screenshot shows the 'Form Letter Information' search options panel. It includes the following fields and options:

- Letter Name**: Search for Letter Name
- Search for Text In**: ☒ Letter ☒ Description
- Status**: Search for Status
- Assigned To**: Search for Assigned To
- Created By**: Search for Created By
- Requested Approver**: Search for Requested Approver
- Created**: From To
- Revised**: From

Buttons at the bottom: **Search** and **Advanced**.