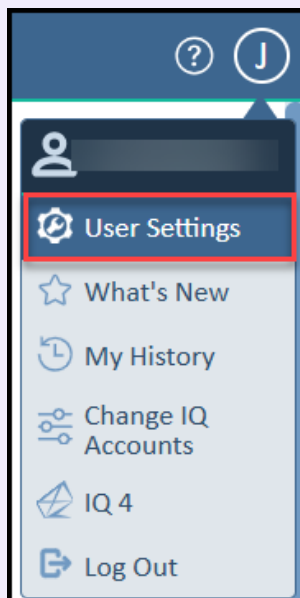


Setting Default & Preferred Service Templates

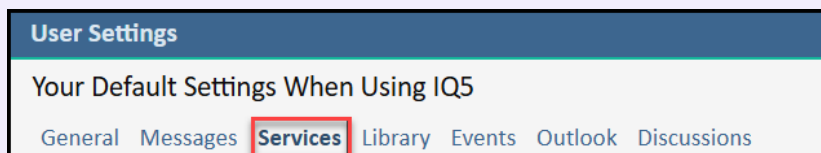
Market: House, Senate

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.

The image shows a 'User Settings' dialog box with a title bar and a close button. The main heading is 'Your Default Settings When Using IQ5'. Below this is a tabbed interface with tabs for 'General', 'Messages', 'Services' (which is selected), 'Library', 'Events', 'Outlook', and 'Discussions'. Under the 'Services' tab, there are several sections. The first section contains five buttons: 'Meetings (Meetings) X', 'Casework (Casework) X', 'Academies (Military Academy Nominations) X', 'Flags (Flag Request (Web - Pay.gov)) X', and 'Grants (Projects & Grants) X'. Below these is a 'Scheduling (Scheduling Requests) X' button. The next section is 'Service Applications' with a dropdown arrow. Under it is 'Default Template for New Services' with a dropdown menu showing 'Casework' and a close button. Below that is another row of buttons: 'Flag Request (Web - Pay.gov) X', 'Tour Request X', and 'Casework X'. The final section is 'Preferred Templates' with a dropdown arrow. It contains four checkboxes: 'Expand UDF section in Service Lists' (unchecked), 'Display address of attached Contacts in reading pane' (checked), 'Hide Address section in Service Lists' (unchecked), and 'Hide Service Code section in Service Lists' (unchecked). At the bottom left is a 'Reset Other Settings' button, and at the bottom right is a 'Done' button.

8. Click **Done**.

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