IQ5 User Preferences

Market: House, Senate

Description: These instructions teach users how to set their User Preferences 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.

User Settings	×
Your Default Settings When Using IQ5	
General Messages Services Library Events Outloo	k
Start in Feature	-
Home 🗸	
Color Theme	
Purple 🗸	
Menu Width	
2 Wide 🗸	
Open Views Menu When Changing Features	
Maximize Width of Record Detail Panel When Vie Log Call × Add Contact × Add Service × Add Event × Pinned Quick Actions	ewing Single Records
My Inbox × Contacts × Messages × Services × Casework ×	
Add Menu(s) as Quick Actions	
Add Favorites(s) as Quick Actions	
Reset Other Settings	Done

- 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. Choose to open or hide the views menu when changing features,
 - iv. Permanently maximize the width of the record detail panel when viewing single records,
 - v. You can select "Quick Actions" to pin actions to the action bar,
 - vi. You can also add different IQ5 Applications as additional "Quick actions" as shown above.
 - vii. Finally, 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:



- b. **Messages:** Allows you to choose to include CSZ in messages lists, include the Congressional District in Message lists or include the incoming message in message lists.
- c. **Services:** Allows you to add a default Service type when creating a new Service and to add any Services as their own Applications in the IQ5 menu.
- d. **Library:** Allows you to set a default directory for new Form Letters to be saved, as well as selecting a default Form Letter template.
- e. **Events:** Allows you to set default settings when creating new events, including which calendars the new event will be saved to and the duration of new events.
- f. Outlook: Allows you to connect to an external email address.