

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 new records that meet the Favorites criteria are added to and/or existing records that no longer meet the criteria are removed from your **Favorites**.

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

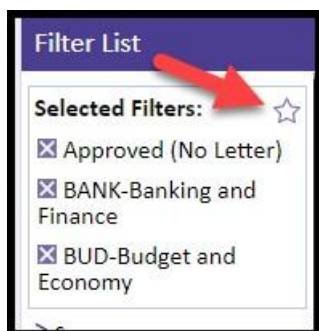
[Viewing a Favorite](#)

[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.
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

Favorite List

Description

Sample of a Saved Favorite List

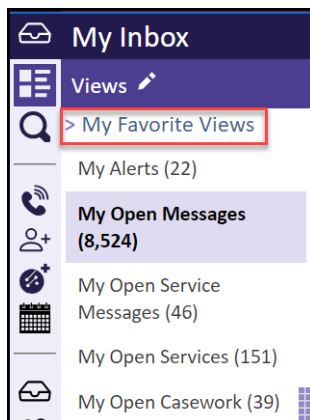
Save and View

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 .



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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 **Modify Existing Favorite** button.

Favorite View

Save to Menu's My Favorite Views Section

With Selected Filters

Title

Saved Favorite - Modified

Description

Sample of a Saved Favorites Link

Copy Favorite


Remove from Favorites

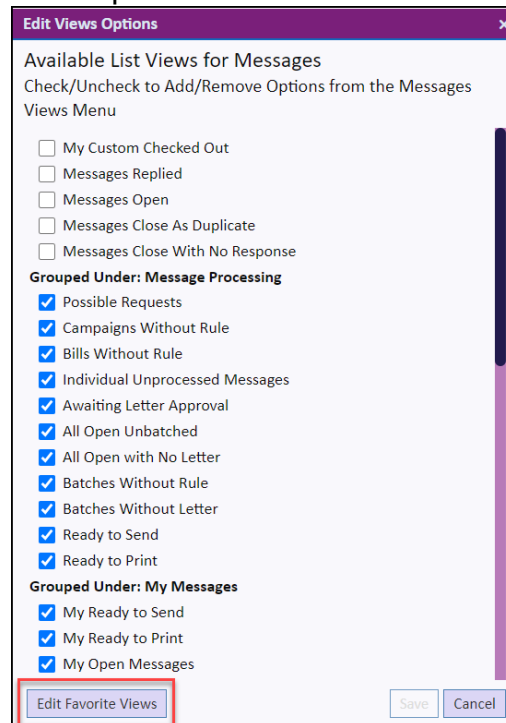
Modify Existing Favorite

Close

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Removing a Favorite

1. Click on the  icon next to **Views**.
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

- ☐ My Custom Checked Out
- ☐ Messages Replied
- ☐ Messages Open
- ☐ Messages Close As Duplicate
- ☐ Messages Close With No Response

Grouped Under: Message Processing

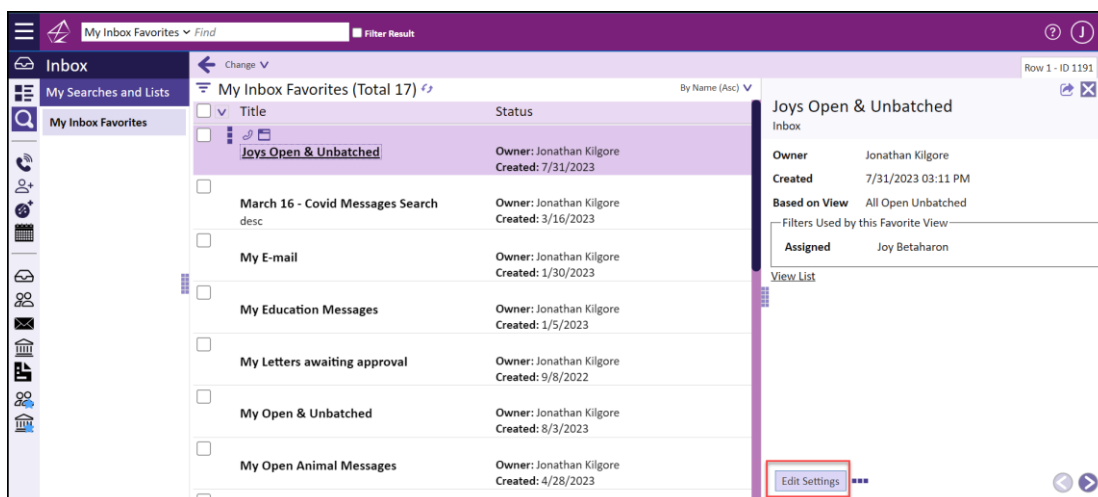
- ☒ Possible Requests
- ☒ Campaigns Without Rule
- ☒ Bills Without Rule
- ☒ Individual Unprocessed Messages
- ☒ Awaiting Letter Approval
- ☒ All Open Unbatched
- ☒ All Open with No Letter
- ☒ Batches Without Rule
- ☒ Batches Without Letter
- ☒ Ready to Send
- ☒ Ready to Print

Grouped Under: My Messages

- ☒ My Ready to Send
- ☒ My Ready to Print
- ☒ My Open Messages

Edit Favorite Views Save Cancel

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



My Inbox Favorites Find Filter Result

Inbox

My Searches and Lists

My Inbox Favorites

My Inbox Favorites (Total 17)

Title	Status
<u>Joys Open & Unbatched</u>	Owner: Jonathan Kilgore Created: 7/31/2023
March 16 - Covid Messages Search desc	Owner: Jonathan Kilgore Created: 3/16/2023
My E-mail	Owner: Jonathan Kilgore Created: 1/30/2023
My Education Messages	Owner: Jonathan Kilgore Created: 1/5/2023
My Letters awaiting approval	Owner: Jonathan Kilgore Created: 9/8/2022
My Open & Unbatched	Owner: Jonathan Kilgore Created: 8/3/2023
My Open Animal Messages	Owner: Jonathan Kilgore Created: 4/28/2023

Joys Open & Unbatched

Inbox

Owner Jonathan Kilgore

Created 7/31/2023 03:11 PM

Based on View All Open Unbatched

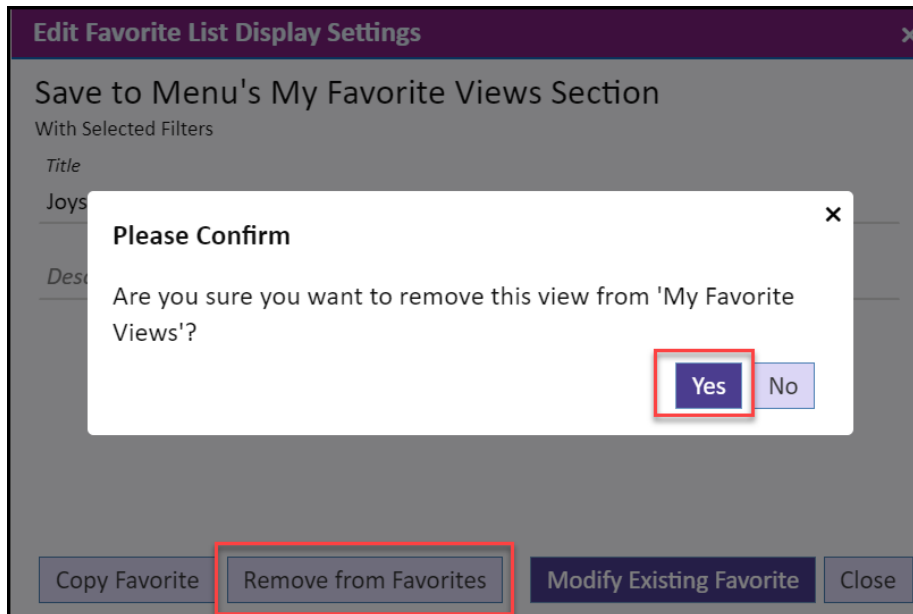
Filters Used by this Favorite View

Assigned Joy Betaharon

View List

Edit Settings

4. Click **Remove from Favorites**. Click the **Yes** button to confirm changes.



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