Logging Calls in IQ5

Market: House, Senate

Description: The IQ Opinion Center allows user to capture constituent information quickly into IQ, which immediately creates IQ records that can be processed. These instructions teach users how to create new constituent opinion records, search for these records, and manage information in the Opinion Center.

Logging a Call

1. Click on the **Log Call** [icon] icon on the left side of the screen.
2. The Log Call page is displayed. The left column is where the constituent's contact is selected. The middle column is where the opinion is documented and is associated with IQ fields (e.g., affiliations, issues, bills, batches, etc.). The right column is a set of links and selections to support the documentation of the opinion.

3. The best practice is to start filling out the middle column first to capture the details of the constituents call. The right hand columns information can be used to assist with capturing the details of the call by clicking on the comments to add them in or by clicking on the issues to add those to the call. Below is a break down of each field:

Middle Column:

Method In

Telephone Call ⌄

Date In

08/29/2023 📅

Comments

Select a Batch

Issues ⊕

Method Out

E-Mail ⌄

Assigned To

Jonathan Kilgore

Form Letter

Bills

○ Supports ○ Opposes ○ No Position

Select File(s) - or - Drop File(s) Here

Affiliations ⊕

- **Method In:** Select the method in which the opinion originated
- **Date In:** The current days date will be auto selected.
- **Comments:** Use this field to capture the details of the opinion.
- **Issues:** Select the appropriate issue code to associate with the opinion.
- **Select a Batch:** If appropriate, select a batch to for the opinion to be placed in.
- **Method Out:** Select the method to respond to the opinion if a response is required.
- **Assigned To:** Select the staff the opinion record should be assigned to.
- **Form Letter:** Choose a letter that can be used to respond to the constituents' opinion.
- **Bills:** If Constituent is calling concerning a bill, select the appropriate one from the list and their position.
- **Select a file:** If necessary, attach relevant files associated with the opinion.
- **Affiliations:** Select the appropriate affiliation code(s) to associate with the constituent

Right Column:

- **Create:** Select which type of record will be created once the opinion is logged. The availability of options can be configured based on a user's role. Contact your IQ Consultant for details.
- **Recent Form Letters:** This lets you select from a list of Form Letters you have sent recently in response to constituents.
- **Phone Script:** This will display if your office added a phone script to the issue code used to tag the opinion.
- **Common Opinions:** Based on historical data, IQ displays a list of opinion comments that were previously entered. By clicking on one, IQ will automatically populate the **Comments** field.
- **Common Issues:** Based on historical data, IQ displays a list of issue codes that were previously used for opinions. By clicking one, IQ will automatically populate the **Issue** field.

Common Issues

COVID19 -- Covid19 issues (6)

EDU -- Education (4)

COVID- HYBRID LEARNI -- COVID- HYBRID LEARNING (3)

COVID- VACCINE INFO.P -- COVID- Vaccine Info - Pro (2)

COVID- VACCINE INFO -- COVID- Vaccine Info (2)

COVID -- COVID Relief Bill (2)

EDU- HYBRID LEARNING -- Education (2)

4. After capturing the call, use the left-hand column to match the call with a constituent in your database. If they don't exist, **Create a New Contact** is selected by default and will create a new contact record once the call is logged. *Contacts can be created with just a phone number if necessary.*

Log Call

Search by Nameline, Email or Phone

Prefix   First Name   Middle Name   Last Name

Address   City   State   Zip   🔍

Email   Type
Cell Phone ⌄   Phone

Title   Organization

⦿ Create a New Contact

5.

a. ***Note**: If you notice duplicate contact records while searching for the caller, you can select one of those contacts, click **Duplicate Check** at the bottom, and merge the duplicates you have found.

6. Finally, choose one of the following options:
   a. **Response Required:** If the constituent wants a follow up call, email, etc. choose response required. Make sure you have assigned the call to the correct person first.
   b. **No Response:** If the constituent called to just give an opinion and needs no follow up, choose no response.

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