Completing a Service Record

Market: House, Senate

Description: These instructions teach users how to complete a service template.

Click the following links to be brought straight to the following topics:

[Attaching and Removing Contacts]

[Adding Attachments]

[Adding Notes]

[Logging Phone Calls]

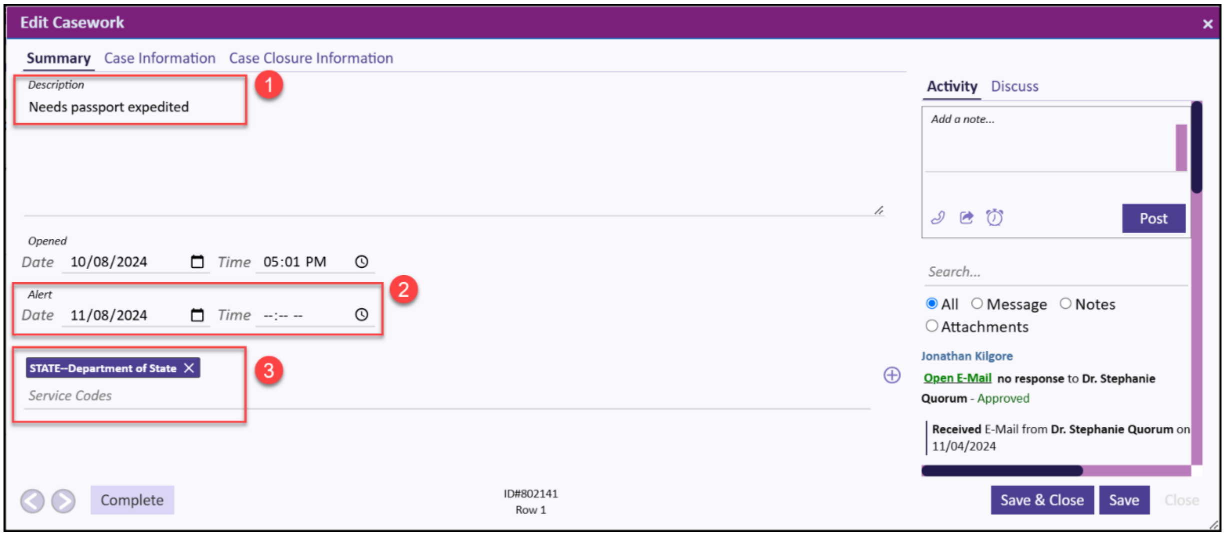
[Creating Custom Alerts/Sending an Information Copy]

[Add/Remove a Monitor]

Completing the Detail Page

As soon as you create a new Service, regardless of type, the user is redirected to the **Detail Page**, which is the template that is customized for that service.

1. In the **Summary** tab, enter in the details in the **Description** field for the Casework (or other service).
2. Click in the first box of the **Alert** field to select a date that you want to be Alerted on to follow up with this Service. Click in the second box to type in the time the Alert should occur.
   a. **Note:** if you leave the time field blank, it will default to midnight on the date that you have chosen.
3. Type in a **Service Code** to indicate which Federal Agencies (if any) are going to be involved in this Service.
   a. **Note:** For a **Casework** service, you must have **at least one** service code in this field in order to complete the service. For other Services, such as a **Flag Request** there may be a unique service code that appears for you.

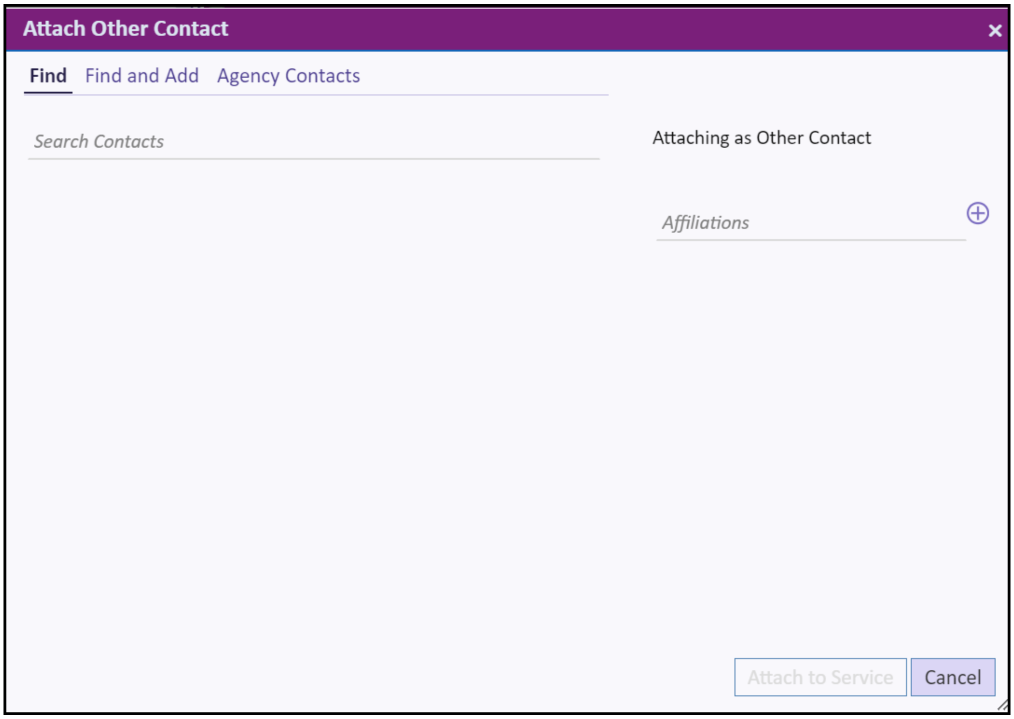


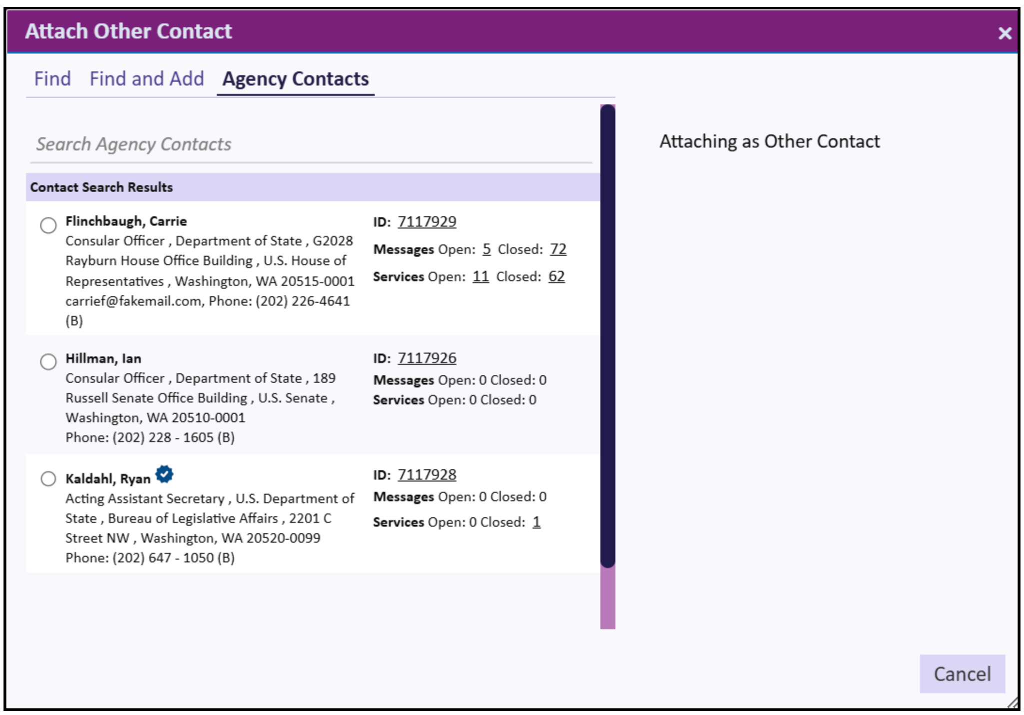
4. Continue to complete the information in the different tabs of the case: **General Information, Case Information,** and when ready to close the case, **Case Closure Information**. Note that tabs displayed can be unique to each office. Fill out the fields as you have the information. Remember these fields will change based on the Service chosen. You do **not** need to fill out all these fields at the time the Service is opened.
5. Click **Save & Close** or **Save**.
   a. **Save and Close:** Saves the entered information and returns you to the previous screen you were on.
   b. **Save:** Saves the information entered without closing it. Allows you to save your work as you go.

[Top of Page]

Attaching and Removing Contacts

1. If the Service was created from the Contact Record the **Primary Contact** field will have that Contact attached already. If the Service was created anywhere else, click the ⊕ icon next to **Other Contacts**.
   a. **Note:** There can only be **one** Primary contact for each service.
2. Use the **Find** or **Find and Add** tabs to search for Contacts in your database or create a new contact to attach to the Service. Click on the **Agency Contacts** tab to search your database for any Contact records that are tagged with the same Service code associated with your selected Service. Once found, select the Contact and click the **Attach to Service** button.

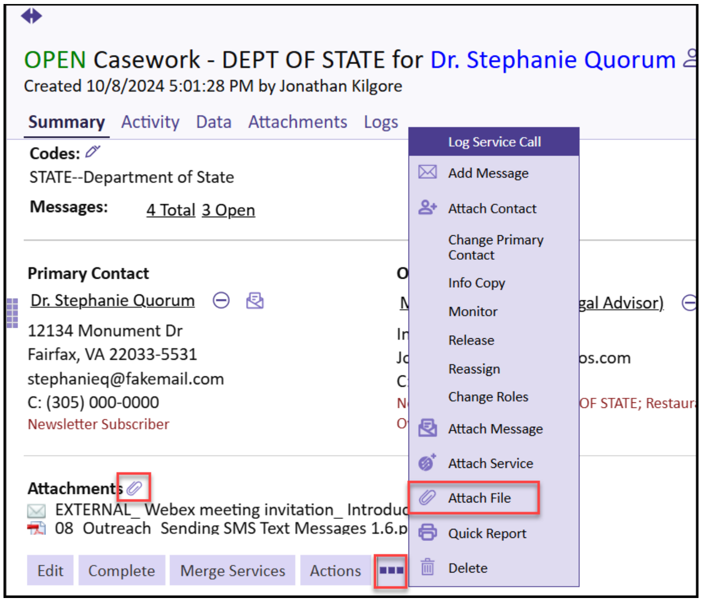

Attach Other Contact
Find
Find and Add
Agency Contacts
Search Contacts
Attaching as Other Contact
Affiliations
Attach to Service
Cancel


Attach Other Contact
Find
Find and Add
Agency Contacts
Search Agency Contacts
Attaching as Other Contact
Contact Search Results
Flinchbaugh, Carrie
Consular Officer , Department of State , G2028 Rayburn House Office Building , U.S. House of Representatives , Washington, WA 20515-0001
carrief@fakemail.com, Phone: (202) 226-4641 (B)
ID: 7117929
Messages Open: 5 Closed: 72
Services Open: 11 Closed: 62
Hillman, Ian
Consular Officer , Department of State , 189 Russell Senate Office Building , U.S. Senate , Washington, WA 20510-0001
Phone: (202) 228 - 1605 (B)
ID: 7117926
Messages Open: 0 Closed: 0
Services Open: 0 Closed: 0
Kaldahl, Ryan
Acting Assistant Secretary , U.S. Department of State , Bureau of Legislative Affairs , 2201 C Street NW , Washington, WA 20520-0099
Phone: (202) 647 - 1050 (B)
ID: 7117928
Messages Open: 0 Closed: 0
Services Open: 0 Closed: 1
Cancel

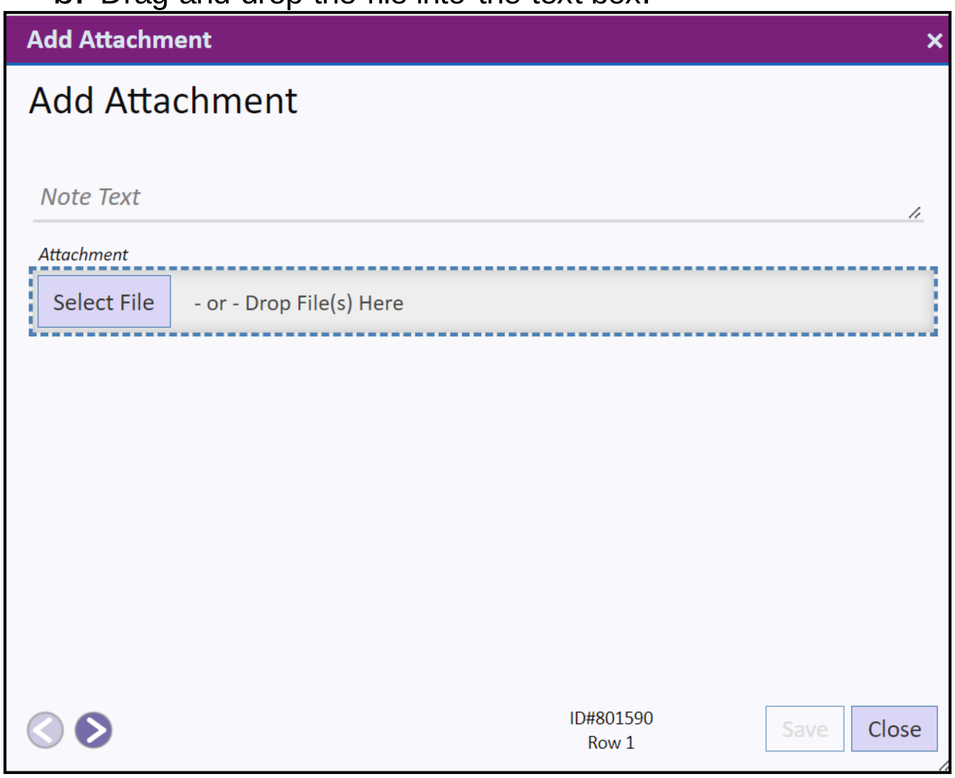
[Top of Page]

Adding Attachments

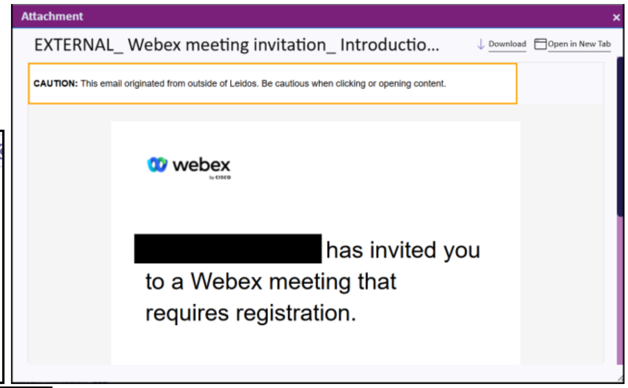
1. Click either the next to the **Actions** button, or click the next to **Attachments**, and select **Attach File**.

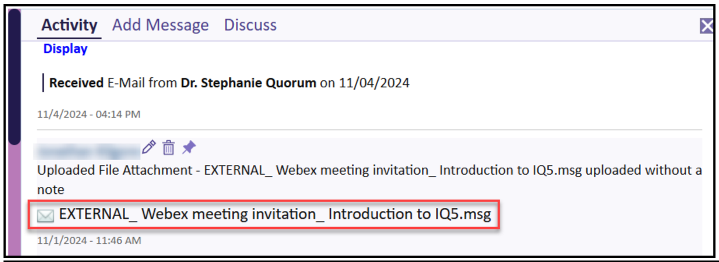


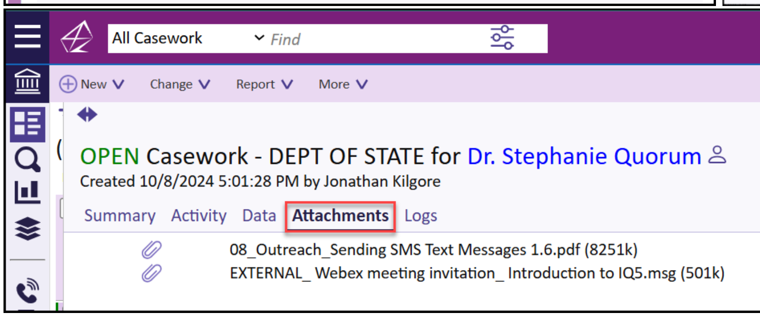
2. In the Add Attachment window, enter the Note Text, if desired, and either:
    a. Select a file to attach; or
    b. Drag and drop the file into the text box.



3. Click **Save**.
4. Review your attached documents in the **Activity** section or download them in the **Attachments Tab** at the top of the service.



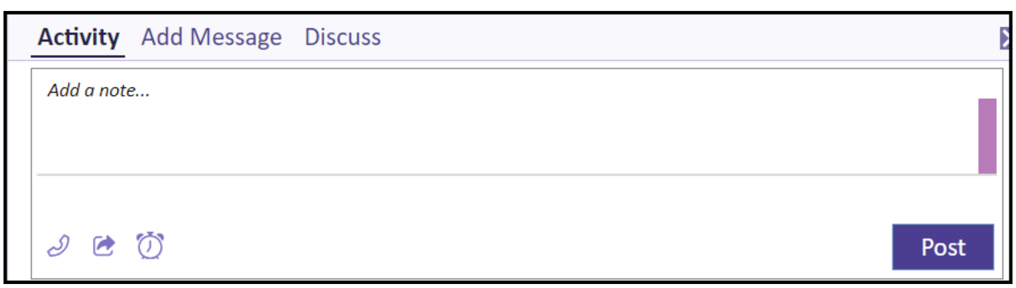




[Top of Page](#)

Adding Notes

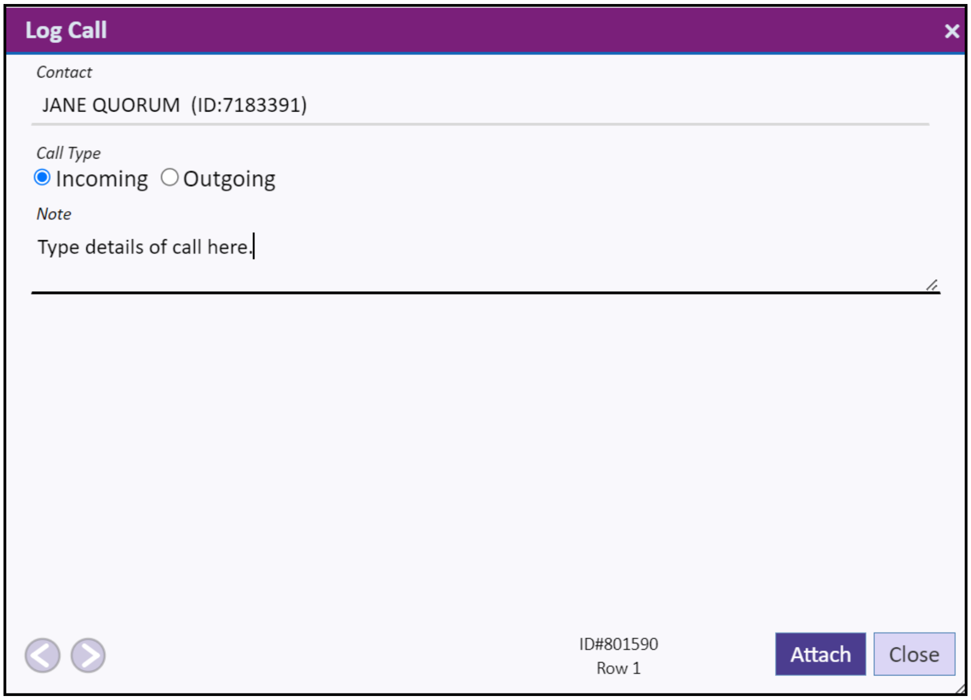
1. Within the Open Service, click on the field directly under **Activity** and type in your **Note**, then click **Post. *Note:** Each note has a 4000 character limit.



Logging Phone Calls

1. Click the button underneath the Note text area.
2. Type in the name of the **Contact** that you are calling/have received a call from.
3. Select the **Call Type,** either **Incoming** or **Outgoing**.

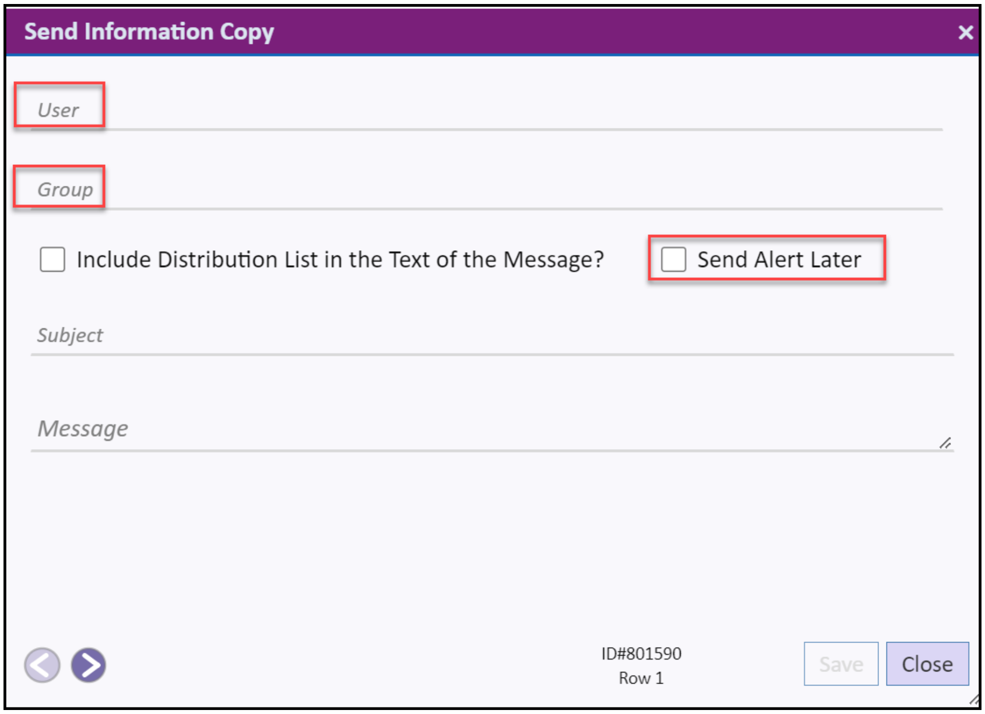
4. Type the details of the call in the **Note** section.
5. Click **Attach**.



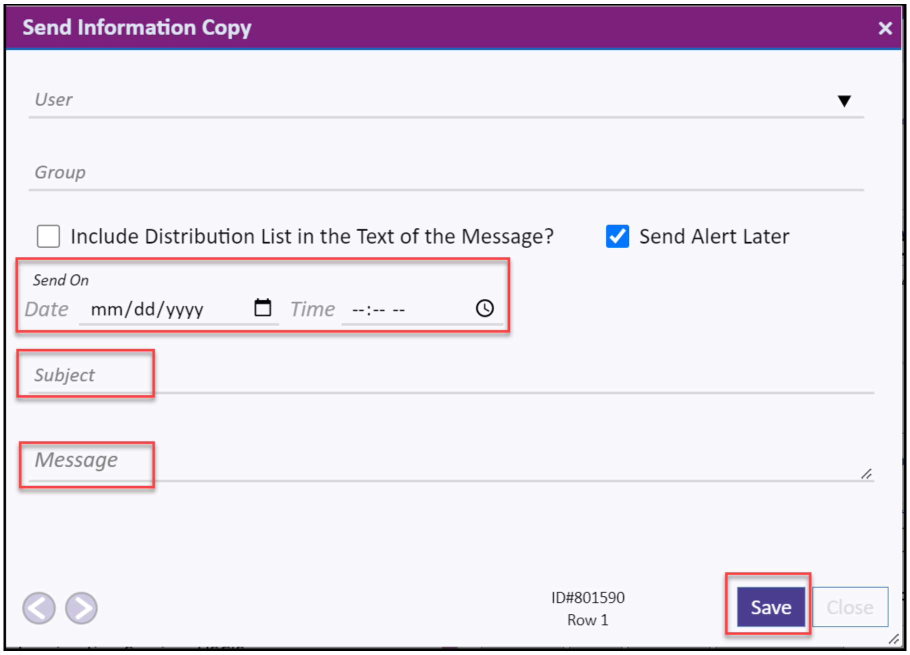
[Top of Page](#)

Creating Custom Alerts/Sending an Information Copy

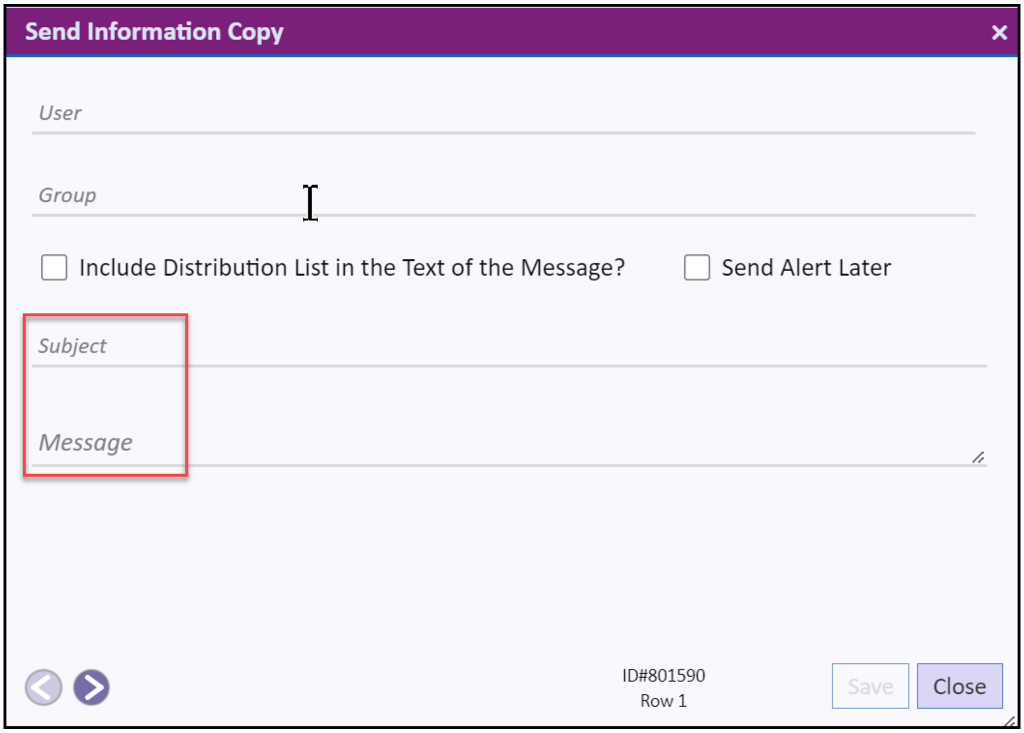
1. Click the  icon underneath the Note text area**.**
2. Click into the **User** field to select the User(s) this will be sent to.
    a. **Note:** If creating a **Custom Alert** choose yourself as one of the Users in this field.
3. Click into the **Group** field if there is a Group of Users that will be receiving this Information Copy or Custom Alert.
4. If sending a **Custom Alert** check the **Send Alert Later** box.



a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Alert will send.
b. Type into **Subject** the name of the Alert. For Example, “Call Primary Contact today”.
c. Type into **Message** the details of the Alert. For Example, “Primary Contact has not been contacted in 30 days as of this alert. Call today with update.”
d. Click **Save**.



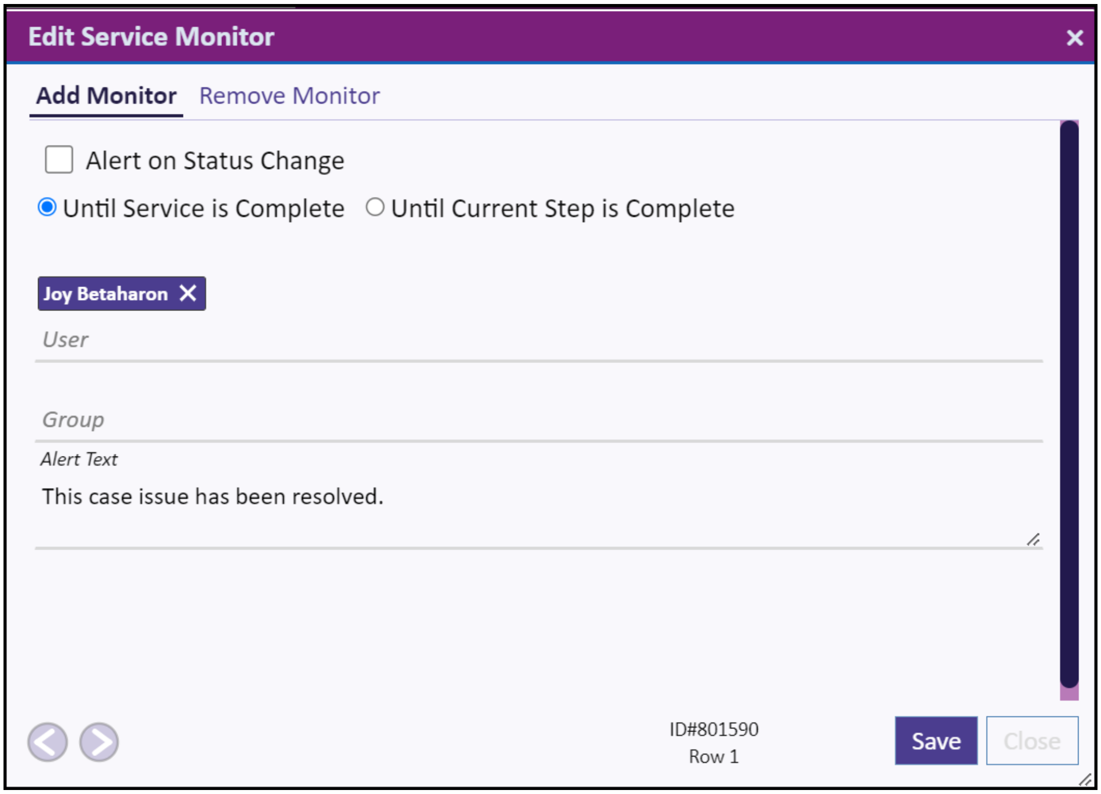
5. If sending an **Information Copy** type in a **Subject** line that will appear in the Users email.
    a. Type into the **Message** field the body of text that will be sent to users.
    b. Click **Save**.

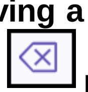


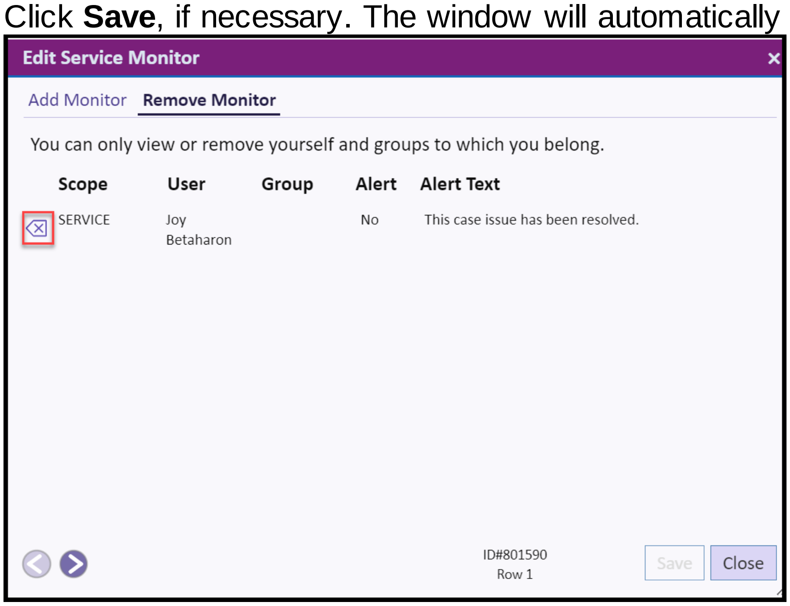
Top of Page

Add/Remove a Monitor

1. Click the icon underneath the Note text area.
2. This opens the **Edit Service Monitor** dialog. By default, it will start on the **Add Monitor** tab.
3. Choose whether to **Alert** the monitor on Status Change and whether to Alert **Until Service is Complete** or **Until Current Step is Complete**.
4. Select the **User(s) or Group(s)** that will be Monitors for this Service.
5. Type into the **Alert Text** field what the Alert should say when sent to the Monitor(s).
6. Click **Save**.



7. If **Removing a Monitor** click the **Remove Monitor** tab.
8. Click the  next to the User(s) or Group(s) you wish to remove as a monitor.
9. Click **Save**, if necessary. The window will automatically close if there is only one monitor.



[Top of Page](#)