
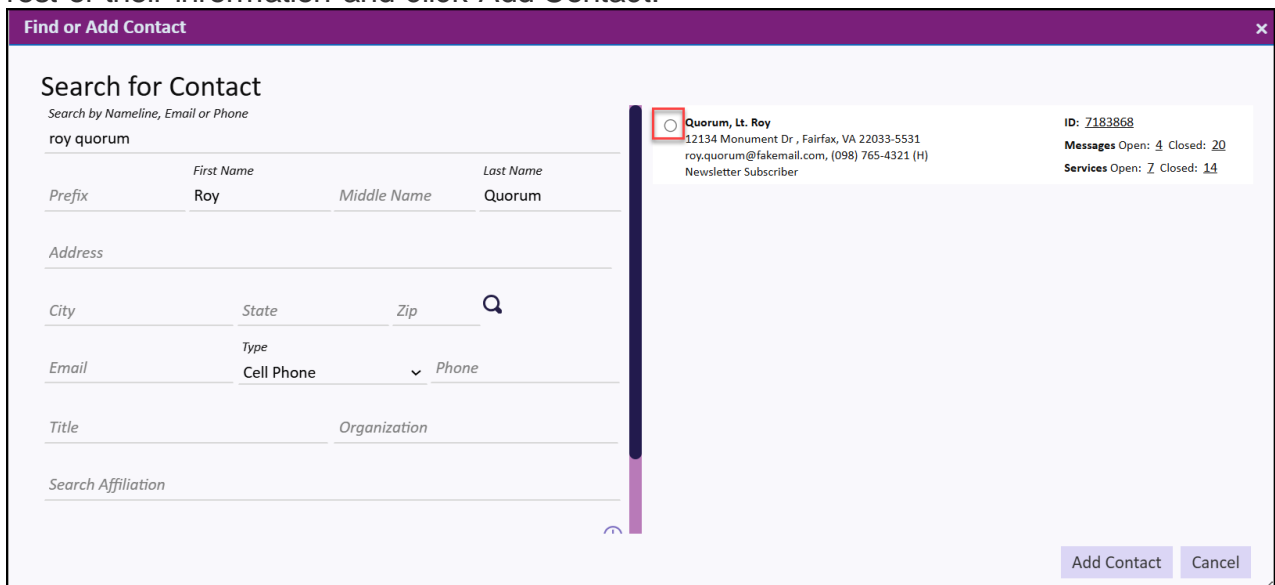


Creating a Service Record

Market: House, Senate

Description: In IQ, services (e.g., Casework, Flag/Tour Requests, etc.) have their own templates yet share common processes. This enables customization in data entry and uniformity in process management. These instructions teach users how to create a service record in IQ.

1. Search for a contact record using the **Find and Add a Contact** icon .
2. Click the radio button next to your existing Contact or, if the Contact does not exist, add in the rest of their information and click Add Contact.



Find or Add Contact

Search for Contact
Search by Nameline, Email or Phone

roy quorum

Prefix	First Name	Middle Name	Last Name
	Roy		Quorum

Address

City State Zip

Email Type Phone
Cell Phone Phone

Title Organization

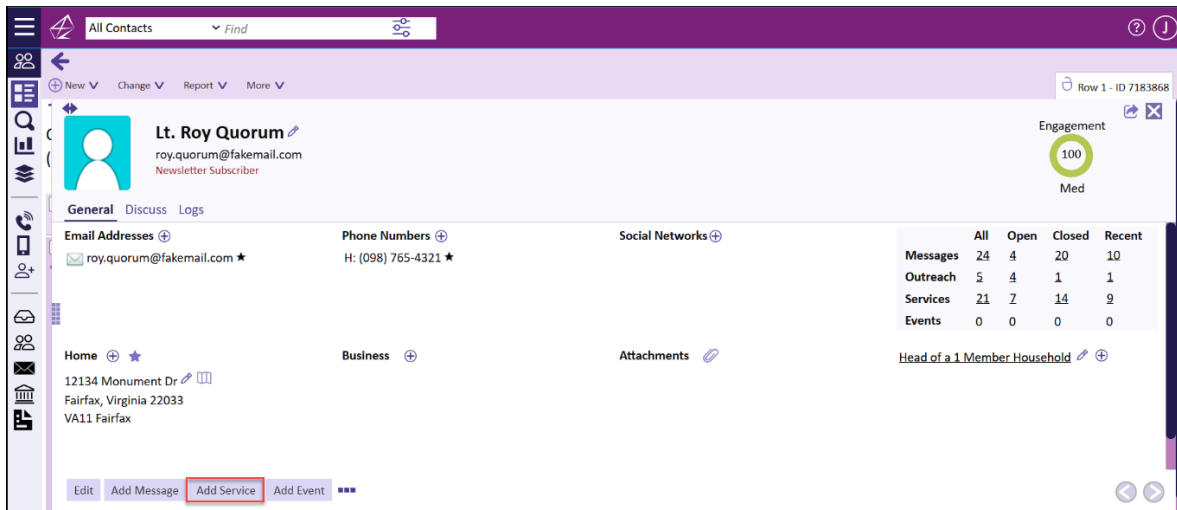
Search Affiliation

Quorum, Lt. Roy
12134 Monument Dr , Fairfax, VA 22033-5531
roy.quorum@fakemail.com, (098) 765-4321 (H)
Newsletter Subscriber

ID: 7183868
Messages Open: 4 Closed: 20
Services Open: 7 Closed: 14

Add Contact Cancel

3. Click the **Add Service** button when viewing the Contact.



All Contacts Find

New Change Report More

Lt. Roy Quorum
roy.quorum@fakemail.com
Newsletter Subscriber

Engagement 100 Med

General Discuss Logs

Email Addresses Phone Numbers Social Networks

roy.quorum@fakemail.com H: (098) 765-4321

	All	Open	Closed	Recent
Messages	24	4	20	10
Outreach	5	4	1	1
Services	21	7	14	9
Events	0	0	0	0

Home Business Attachments

12134 Monument Dr
Fairfax, Virginia 22033
VA11 Fairfax

Head of a 1 Member Household

Edit Add Message **Add Service** Add Event

4. Select the appropriate service and click **Continue** button.
 - a. ***Note:** If you do not see the Service you need listed, click on **Add to New Any Template**.

Create new Service with this Contact as Primary Person ✕

Please select an option

- Add to New Casework
- Add to New Flag Request (Web - Pay.gov)
- Add to New Meetings
- Add to New Tour Request
- Add to New Scheduling Requests
- Add to New Military Academy Nominations
- Add to New Projects & Grants
- Add to New Any Template

Continue Cancel

5. Enter all necessary information in the Edit {service} window. Click through and enter all data on the additional tabs at the top. Be sure to also include a **Service Code**.

Edit Casework [X]

Summary Case Information Case Closure Information

Description

Activity Discuss

Add a note...

Post

Search...

All Message Notes
 Attachments

Process Case Begun 11/5/2024 - 03:40 PM

Opened

Date 11/05/2024 Time 03:40 PM

Alert

Date mm/dd/yyyy Time --:-- --

Service Codes

Complete ID#802146 Row 1 Save & Close Save Close

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