



Managing Casework Services in IQ



▶ **Audience:**
All IQ Users

▶ **Method of Training:**
WebEx/remote

▶ **Market:** House,
Senate

SUMMARY

This is an introductory-level course and is a pre-requisite for new users of the IQ tool.

BY THE END OF THIS COURSE, YOU WILL BE ABLE TO

- ▶ Utilize homepage tiles to manage Casework more efficiently
- ▶ Find and Merge duplicate Contact records to keep your Contact database clean
- ▶ Create a Casework from within a Contact record, automatically tying the Contact to the Case
- ▶ Reassign and Acquire Casework to ensure the correct user owns each Case
- ▶ Add, Remove, and Message Contacts in a Casework to easily communicate with constituents
- ▶ Utilize Casework tools such as Notes, Discuss and Custom Alerts to work the Case
- ▶ Close a Casework record