

Using the Quick Intake Tile

Market: House, Senate

Description: These instructions teach users how to use the **Task Tile** to quickly capture information and create records in IQ.

1. Navigate to the **Home** module.
2. Find the **Task Tile** and click **Quick Intake**.



Note: This tile is customizable and requires configuration by your IQ

3. Search for or create a new contact record.

Quick Intake

Constituent Information

Select record or click Create New

Name (Mr. Joe T. Quorum Jr.)

lisa simpson

Address

City

State

Zip

Phone Number

Email Address

Lisa Simpson

742 Evergreen Terrace
Springfield, Virginia 22150
7032118945

ID# 7118132
(3 services)

CREATE NEW

4. Select the type of task to complete.

Opinion

Case

Schedule

Tour