

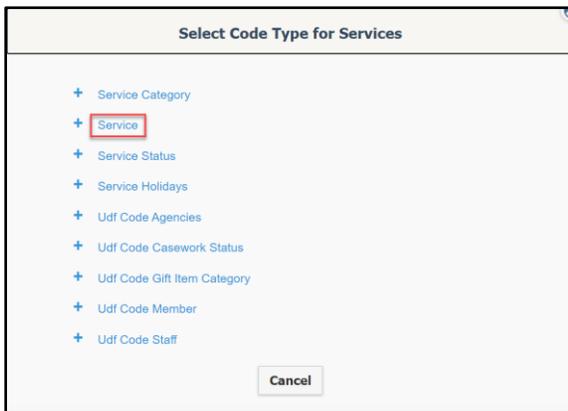
Adding Service Codes and Agency Contacts

Market: Federal/State/Local, House, Senate

Description: In IQ, **Service Codes** refer to codes for agencies that assist with the service. When a contact is connected to a Service Code, they are referred to as an **Agency Contact**. These instructions teach users how to create service codes and agency contacts.

Creating a Service Code

1. Navigate to **Services > Utilities > Codes**.
2. Select **Service** from the list.



3. A complete list of Service Codes appears. To add a new service code, click **Add Code**.



4. Complete the fields below.

- Enter a **Code ID**. Typically, this is a shortened version of the code.
- Enter a **Translation**. This is generally a more lengthy explanation of the code.
- The **Archive** check box is used if you wish to remove the code from active use. Once used, codes cannot be deleted as they are associated with records.
- The **Webform Staff Assignment** assigns new Services with this code to a particular user if the Service is created using a Webform.
- Include a **Category** if you wish to associate this code with a category.
- If you would like a default Due Date to appear in a Service record with this Service Code, enter the Default processing time.
- If you would like all Agency Contacts with this Service Code included in every Service record with this code, check the **Attach Agency Contacts** check box. Leaving the box unchecked will allow you to manually attach Agency Contacts each time you add this Service Code.

5. Click **Save** to save your changes, **Save and Add Another** to save this code and add a new one, or **Cancel** to delete your entry and close the dialog box.

Use a Service Code to Create an Agency Contact

Agency Contacts are typically people that work at an outside agency or office and assist in resolving issues you are handling in IQ Services. Agency Contacts are distinguished by attaching an Agency Code to a Contact record. When that Agency Code is attached to a new Service record as a Service Code, all Contact records with the same code can be made to appear in the Service and can be easily selected for messaging. This means you spend less time searching for your contact and can also search and report on all contacts in an agency using the Agency Code or Category search.

Option 1: Create an Agency Contact from an Existing Contact Record

1. Navigate to **Services > New > Agency Contact**.
2. In the **New Contact** section, enter the information you know about the agency contact. Add the Agency Code or Agency Category at the top of the column. As you enter information, the results of the search appear in the list to the right.
3. If you have located the Contact record, but it does not have the Agency Code attached, check the box in front of the contact and use the **Change** button at the top of the list.
4. Select the option to **Change Agency Contacts**.
5. Add the **Agency Code** or **Agency Category**.
6. Use the **Save** button.

Option 2: Create an Agency Contact in a New Contact Record

1. Navigate to **Services > New > Agency Contact**.
2. In the **New Contact** section, type the information you know about the agency contact. Be sure to add the Agency Code or Agency Category at the top of the column. As you enter information, the results of the search appear in the list to the right.
3. If you have not located the Contact record, use the **Create New Contact** button at the top of the list.
4. All information you entered is captured in the new Contact record. Edit the record as you wish.
5. Use the bread crumbs at the top of the record to return to the Agency Contact List.

The screenshot shows a web-based form for creating a new contact. The navigation bar at the top includes 'Home', 'Contacts', 'Messages', 'Outreach', 'Services', 'Library', and 'Events'. The breadcrumb trail is 'Contacts > New > Contact'. The form fields are as follows:

- Prefix:** (empty)
- First Name:** Buddy
- Middle Name:** (empty)
- Last Name:** Hartman
- Suffix:** (empty)
- Appellation:** (empty)
- Formal Salutation:** (empty)
- Informal Salutation:** Buddy
- Household Salutation:** Hartman Family
- Household Name:** The Hartman Family
- Comments:** (empty text area)
- Birthdate:** (empty date field)
- Agency Code(s):** SSA - Social Security Administration
- Agency Category:** (empty)

Buttons at the bottom: Save (blue), Delete (red), Cancel (white).

View Agency Contacts in a Service Record

In a Service record, all Contacts with the Service Code included in the record will appear on the **Contacts** tab in the Service. Usually, these Agency Contacts are listed as **Not Attached** to the record. If you wish to attach an Agency Contact to a specific Service record, you can use

the **+Attach Contact** Row Action to do so. This will display the contact on the General panel of the Service record with contact information listed below the name.

The screenshot shows a service record for ID# 100789. The 'General' tab is active, displaying details such as Status (OPEN), Assigned (Ned Stark), and Opened/Updated dates. The 'Activity' panel shows a recent note from Ned Stark dated 1/5/2015 at 2:50pm, titled 'Incoming US Postal Mail from Ms. Roberta Aaronson Approved E-Mail response'. Below the activity, there are sections for 'Other Contacts' listing Ms. Roberta Aaronson and Mr. Jim Morehead with their respective contact information.

In a Service record, the Contacts panel displays 2 figures for Agency contacts. The first is the number of contacts attached to the Service record, the second is the number of Agency Contacts located by IQ that have a relevant Service Code attached.

The screenshot shows the 'Contacts (2/4)' tab selected. The 'Service Contacts (2 Filtered Records)' list is displayed. The first record is for 'Amy Morris' (ID# 7004123), a US Postal Service contact. The second record is for 'Ms. Austin Morris' (ID# 7004175), a Lockheed Martin contact. The interface includes filters on the left and a table of contact details with associated agency codes and service categories.

Contact Name	Agency Code	Service Category
Amy Morris	USPS - United States Postal Service	CASE - Casework
Ms. Austin Morris	DOJ - Department of Justice	CASE - Casework