Completing a Service Template

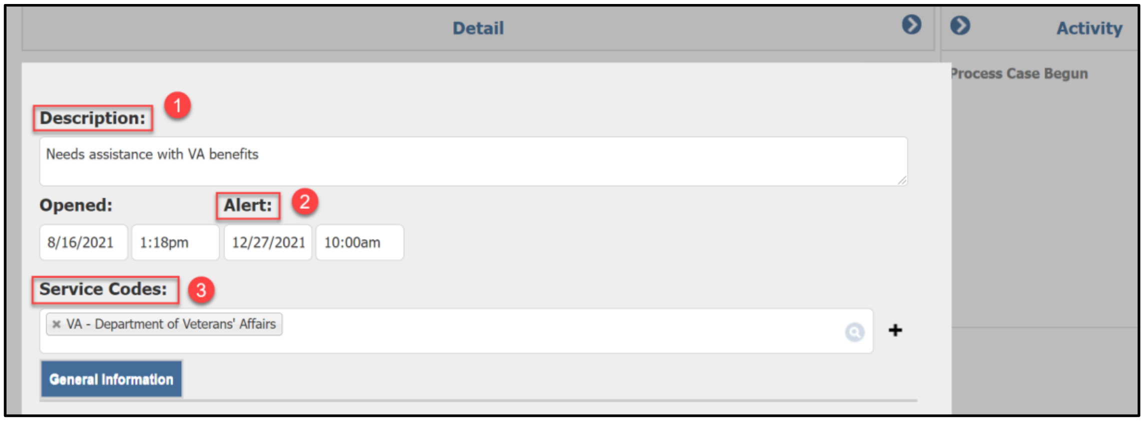
Market: Federal/State/Local, House, Senate

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

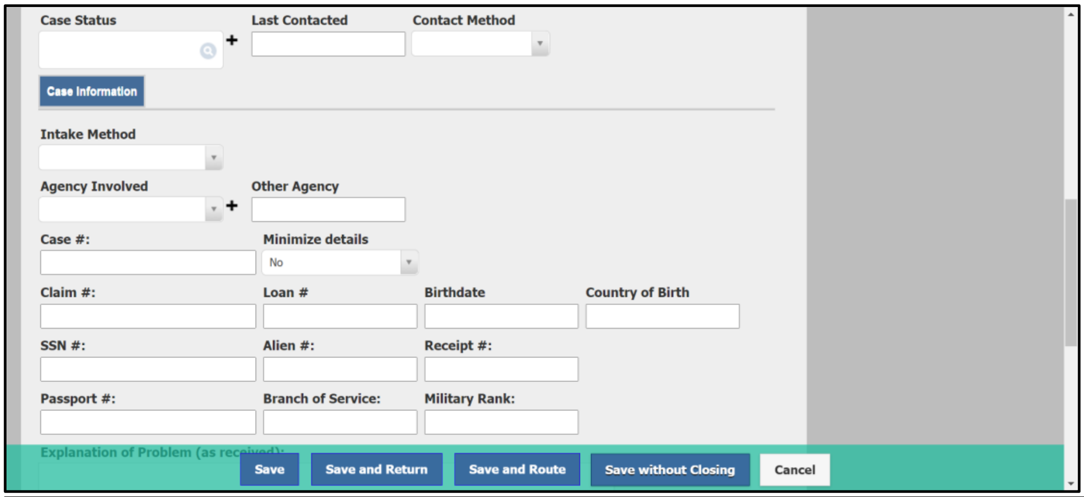
Completing the Detail Page

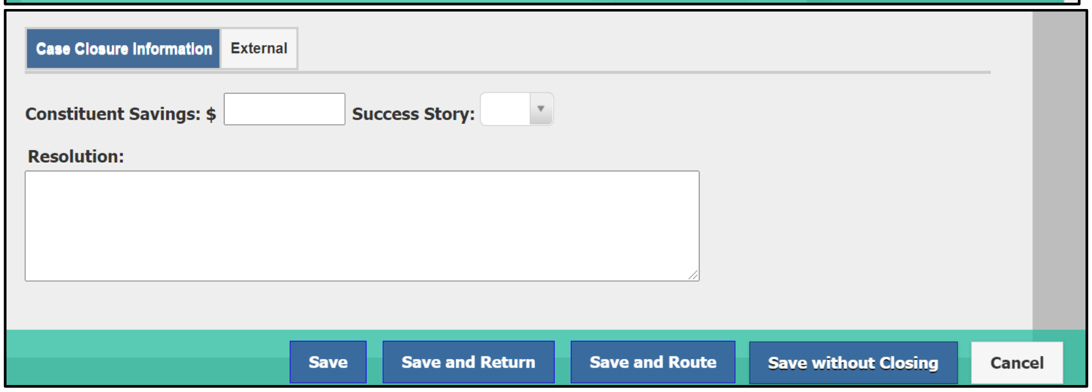
As soon as you create a new Service, regardless of type, the user is redirected to the **Detail Page**, which is the template that is customized for that service.

1. Enter in the **Description** field the details of the Casework (or other service if there is a description field there).
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 to complete the service. For other Services, such as a **Flag Request** there may be a unique service code that appears for you.



4. The fields below are unique to **Casework**. 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.





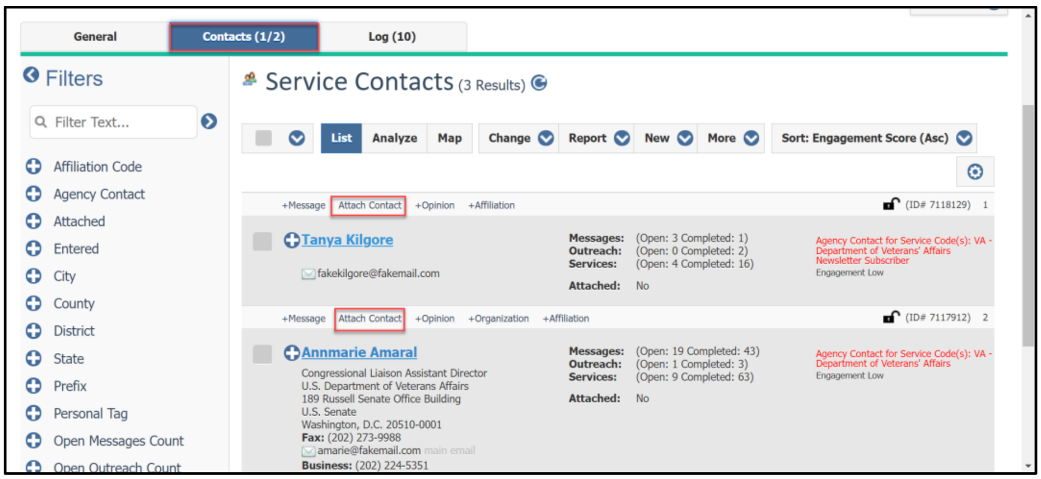
5. Click **Save**.
   a. **Save and Return:** Saves the information entered in the details page and returns you to the previous screen you were on.
   b. **Save and Route:** Saves the information entered and “routes” the Service to it’s next step. Only click this when you are ready to move the Service to it’s next step.
      i. **Note:** For a Casework Service, there is only one step, so selecting this option moves the Service to Completion.
   c. **Save without Closing:** Saves the information entered in the Details Page without closing it. This allows you to save your work as you go.

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 to search and attach the Primary contact.
   a. **Note:** There can only be **one** Primary contact for each service.

2. Click the + icon next to **Other Contacts** to search for Other Contacts associated with the service and attach them.

3. To attach **Agency** Contacts, scroll to the top of the Service and click on the **Contacts** tab. There will be **Agency Contacts** associated with the Service in gray on this page. Click **Attach Contact** above their names if they will be Contacts you reach out to while resolving the Service.
   a. **Note:** These contacts only appear if you entered in one or more **Service Codes** in the **Details Page.**

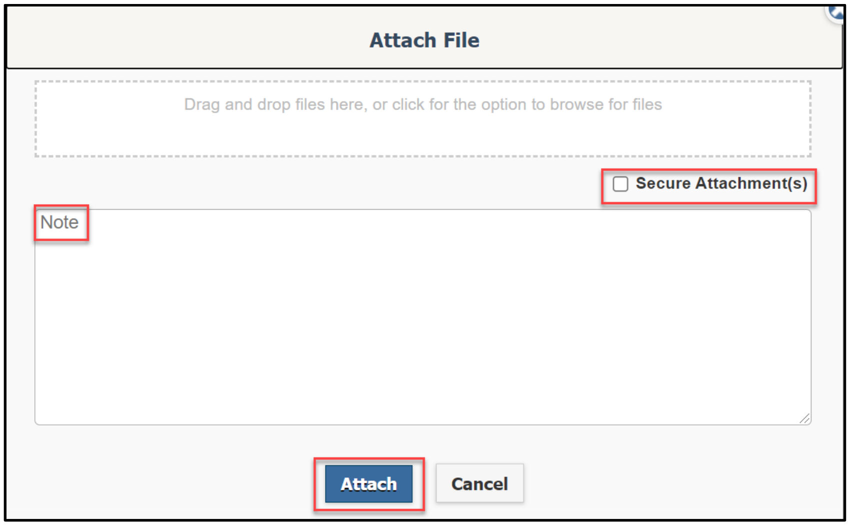


4. To indicate a Contacts **Role** in the service, click the ✎ icon next to **No Role.** Select the appropriate Role(s) from the list.
   a. **Note:** These roles are customizable and can be edited by your IQ Consultant.

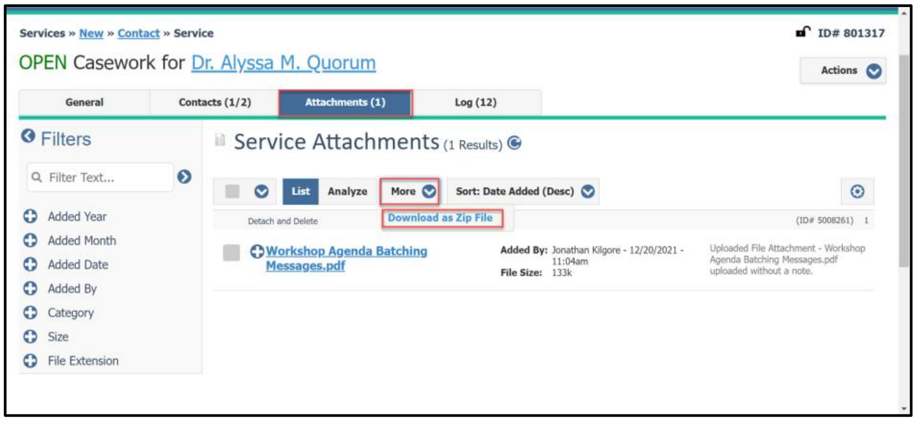
Adding Attachments

1. Click the icon in the **Attachments** field. This opens the **Attach File** dialogue.

2. Click into the dotted box to open your computers file explorer and double click on the file you wish to attach.
    a. **Note:** you can also drag and drop your file into the dotted box to attach the file.
3. Click **Secure Attachment** to enable Record Security on the attached file. This will ensure only certain IQ users can view, edit, or have no access to the attachment. Leave unchecked if there is no need for security on the attachment.
4. Type in a note about the attachment to provide detail about what the attachment is.
5. Click **Attach**.

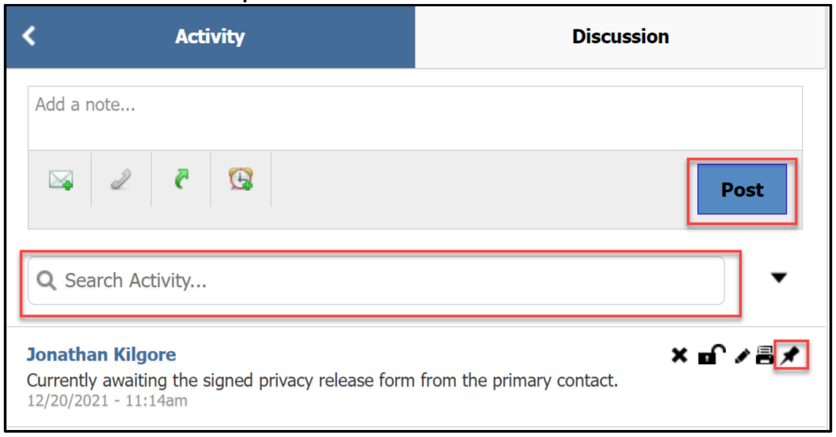


6. Review your attached documents in the **Attachments Tab** at the top of the service.
    a. **Note:** You can download attached files as a .zip file by selecting them in the attachments tab, clicking **more** > **download as .zip**.



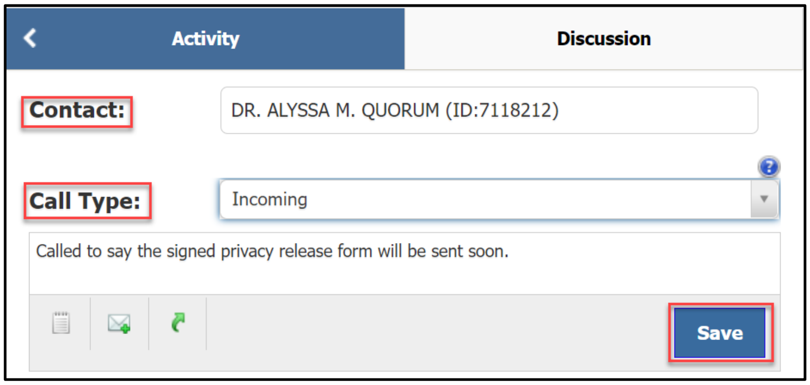
Adding Notes

1. Within the Open Service, click on the field directly under **Activity** and type in your **Note**.
    a. If have recently used a different Tool underneath Activity, click the icon to get back to the **Add a Note** field.
2. Click **Post.**
3. Review these Notes underneath the **Search Activity** bar at any time. Click the icon to **Pin** the note to the top of this section.



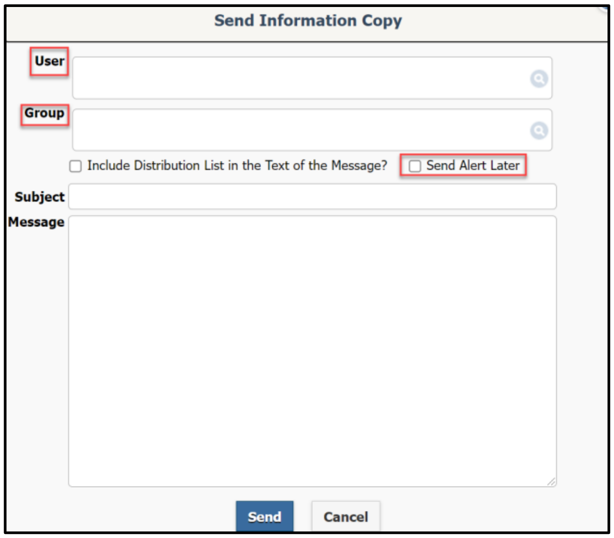
Logging Phone Calls

1. Click the  icon to **Log a Phone Call** for the Service.
2. Type in the name of the **Contact** that you are calling/have received a call from.
   a. **Note:** Press the Space Bar on your keyboard after clicking into the field to review a list of Contacts associated with the Service. Select the appropriate Contact from this list.
3. Select the **Call Type** by clicking on the dropdown field. Select **Incoming** or **Outgoing** depending on the nature of the call.
4. Type the details of the call in the field that says **Add a note**.
5. Click **Save**.

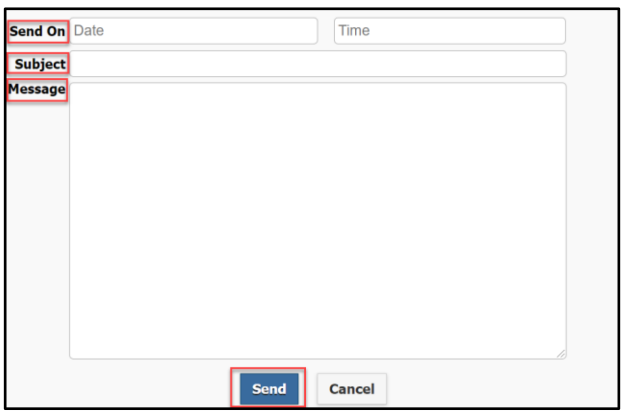


Creating Custom Alerts/Sending an Information Copy

1. Click the  icon.
2. The **Send Information Copy** dialogue appears. 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.



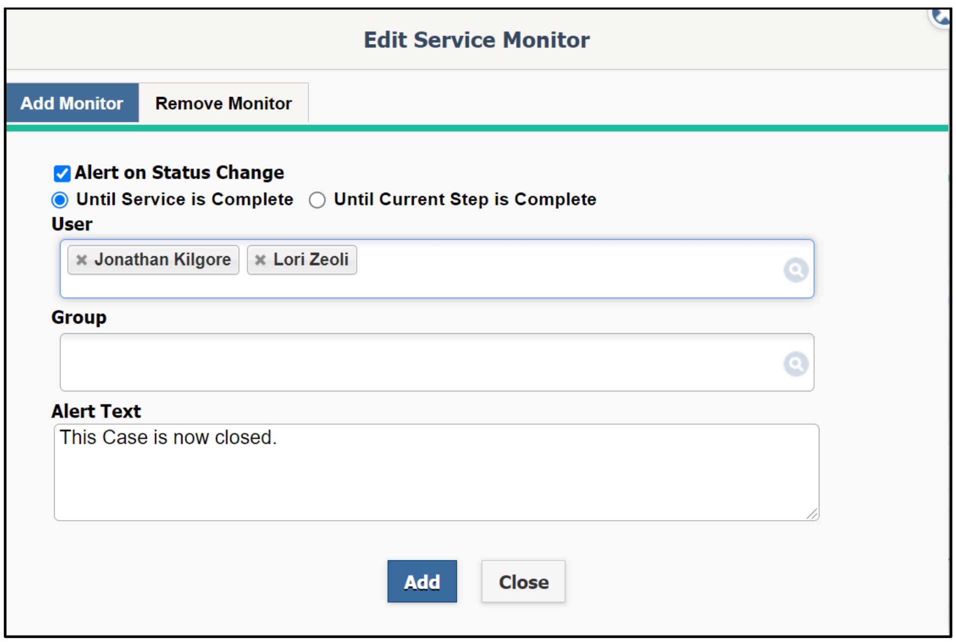
a. The **Send On** fields now appear. Click into the **Date** and **Time** fields to choose when and at what time the Customer Alert will send.
b. In the **Subject** line, enter the name of the Alert. For Example, “Call Primary Contact today”.
c. Type into **Message** the details of the Alert. For Example,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



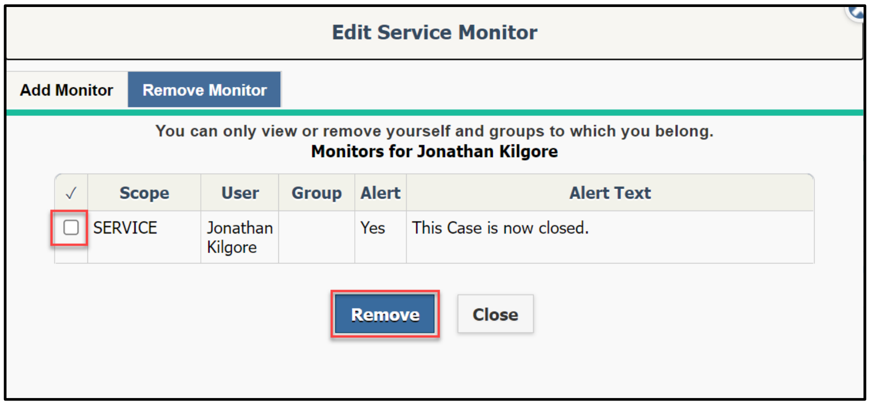
5. If sending an **Information Copy** type in a **Subject** line that will appear in the Users email.
a. Type into the **Message** field the body of text that will be sent to users.
b. Click **Send**.

Add/Remove a Monitor

1. Click the .
2. This opens the **Edit Service Monitor** dialogue. 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 **Add**.



7. If **Removing a Monitor** click the **Remove Monitor** tab.
8. Click the box next to the User(s) or Group(s) you wish to remove as a monitor.
9. Click **Remove**.


Edit Service Monitor
Add Monitor
Remove Monitor
You can only view or remove yourself and groups to which you belong.
Monitors for Jonathan Kilgore
✓
Scope
User
Group
Alert
Alert Text
SERVICE
Jonathan Kilgore
Yes
This Case is now closed.
Remove
Close