Creating a Service Record

Market: Federal/State/Local, 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.

Creating a Service Record from a New Contact Record

1. Navigate to Services > New> Contact.



2. Enter data in the fields in the Find Contact section.



3. Click Add Contact button.

alissa quorum	Find or Add a Contact (7 Results) 6					
Email	Add Contact Change 🛇 New 🛇 More 🛇 Sort: Relevance (Desc) 🛇	D				
Phone Number	+Message +Default Service +Service +Attachment +Opinion +Household +Organization +Affiliation Delete	1				
Title	Opr. Alyssa M. Quorum Messages: (Open: 12 Completed: 55) Newsletter Subscriber Outreach: (Open: 0 Completed: 1) Frequent Writer - High Volume					
Organization	7990 Quantum Dr, Ofc 1 TQ User Vienna, Virginia 22182-5255 VA11 Services: (Open: 17 Completed: 22) US Vet Vienkowenii com Engegement High					
Organization2	Home: (123) 456-7890					
Street Address	+Message +Default Service +Service +Attachment +Opinion +Organization +Affiliation Delete	2				
Street Address2	Messages: (Open: 1 Completed: 1) Outreach: (Open: 0 Completed: 0)					
City	Sentor Quorum Sentor Quorum Innathan, kilgore-2@keidos.com					
State	+Message +Default Service +Service +Attachment +Opinion +Organization +Affiliation Delete	11				
Zip	Christian Messages: (Open: 0 Completed: 1) Outreach: (Open: 0 Completed: 0)					
Country	Legislative Assistant Services: (Open: 0 Completed: 0) Senator Quorum					

4. The Contact window appears with data you entered. Complete all the fields as needed. Click Add & Open.

		Shortcuts V Jonathan V		
Home Contacts 🗙 N	Business	Foreign Affiliation Salutation	Appellation	Admin 🗸
Find Contact	Alissa Street Address			
alissa quorum				
2345678901	City (or Zip)	State	Zip	(ID# 7118212) 1
Title	Email	Phone		ewsletter Subscriber equent Writer - High Volume
Organization	Add & Exit	2345678901		S Vet volgement High
Street Address				(ID# 7182324) 2
Street Address2				
City				

5. Click Action > New Service or Action >New Default Service (if a default services has been configured).

Home	Contacts 🗸	Messages 🗸	Outreach 🗸	Services 🗸	Library 🗸	Events 🗸	LegiStats 🗸	Admin 🗸	
Services » New » Contact ID# 711827								18212	
2	Dr. Alys Newsletter Su	Sa M. Quoru	IM 🔺 'riter - High Volume,	. IQ User, US Vet			Engagement 100 High	Action New Default Service New Service Attach Existing Event New Form Message	15 🚫
Gene	ral Messag	ges (67) Outre	ach (1) Serv	rices (39) E	vents (3)	Boards (0)	Voter Data	New Custom Message New Opinion	
Home Ad	idress + *	Busir Store	ness Address +		Online Info	+ fakeemail.com * 4	Phone H: (123	Duplicate Check Summary Report by Sect Delete	tion
Vienna, V/ VA11 Fairf	A 22182-5255 fax County	Targe	t		ignathan 2@leidos.co	n.kilgore- m	(ussion (0
33 Maryla Rockville, MD08 Moi	nd Ave MD 20850-0315 ntgomery County	•							Disc

6. A list of Service templates for your office is displayed. Select the service.

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Creating a Service Record from an Existing Contact Record

1. Navigate to Services > New >Contact.



 Enter data in the fields in the Find Contact section and select the Find Existing Contacts button to search for the Contact in IQ database. You can use one or more fields to search for the Contact.

Find Contact
Name (Mr. Joe T. Quorum Jr.)
Email
Phone Number
Title
Organization
Organization2
Street Address
Street Address2
City

 IQ displays a list of possible matches, based on the data you searched for. Click +Default Service (if you have a selected a default template you want to use) or +Service to create a new Service.



4. A list of Service templates for your office is displayed. Select the service.







Note: You can also click on the Contacts name to enter their Contact record and create the New Service by clicking on the Action dropdown found in the Contact record.

Creating a Service Record from the Service Menu

1. Navigate Services > New > Service.



2. The Select Service Type window is displayed. Depending on your configuration, the Show Preferred Only displays services that are customized for your account. To view all services for your offices, uncheck this box. Click the link of the service.



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3. The template tailored for the selected service is displayed on the screen. Complete the fields for the service template. In IQ, the fields that are displayed will vary based on the template. However, the following fields below are common in most templates:

Opened:	Due:	Step Due:	Alert:	Priority:
2/3/2021 10	0:18am			9 💌

- a. Service Code: This is the code for the agency that may be involved with processing the service.
- b. *Due*: This is the date when the entire process must be completed.
- c. *Step_Due*: Some services involve several stages or steps. This is the date that the current step of the service must be completed.
- d. Alert. This is the date a user is alerted to remind them that the step needs to be completed.
- e. *Priority*: This is the level that identifies the priority of the service. Each office's priority levels vary. Contact your Office IQ Consultant for details.
- 4. Click Save