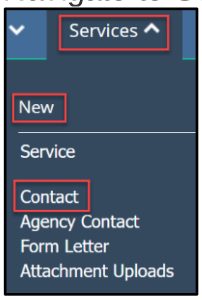
# Creating a Service Record

**Market:** Federal/State/Local, House, Senate

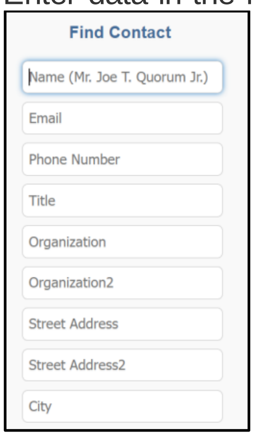
**Description:** In IQ, services (e.g., Casework, Flag/Tour Requests, etc.) have their own templates yet share common processes. This enables customization in data entry and uniformity in process management. These instructions teach users how to create a service record in IQ.

### *Creating a Service Record from a New Contact Record*

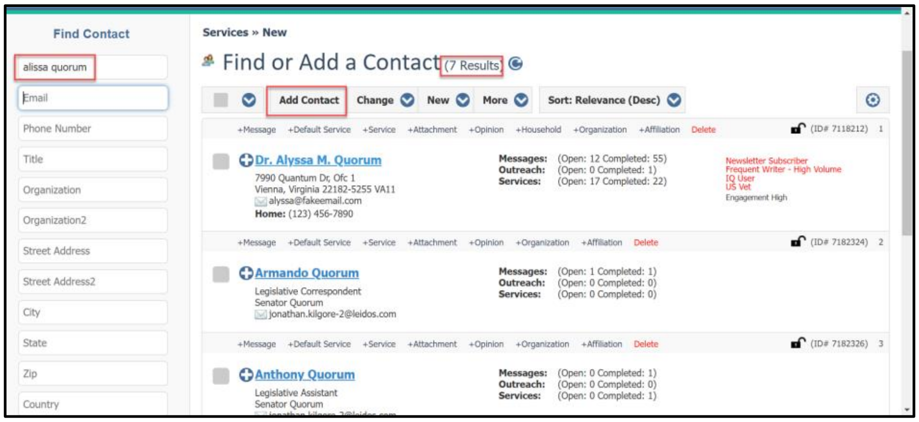
1. Navigate to **Services > New> Contact.**



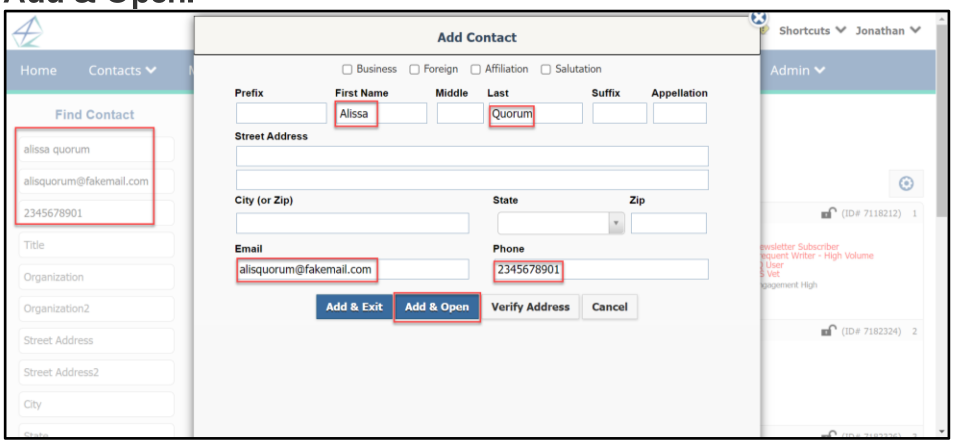

2. Enter data in the fields in the **Find Contact** section.



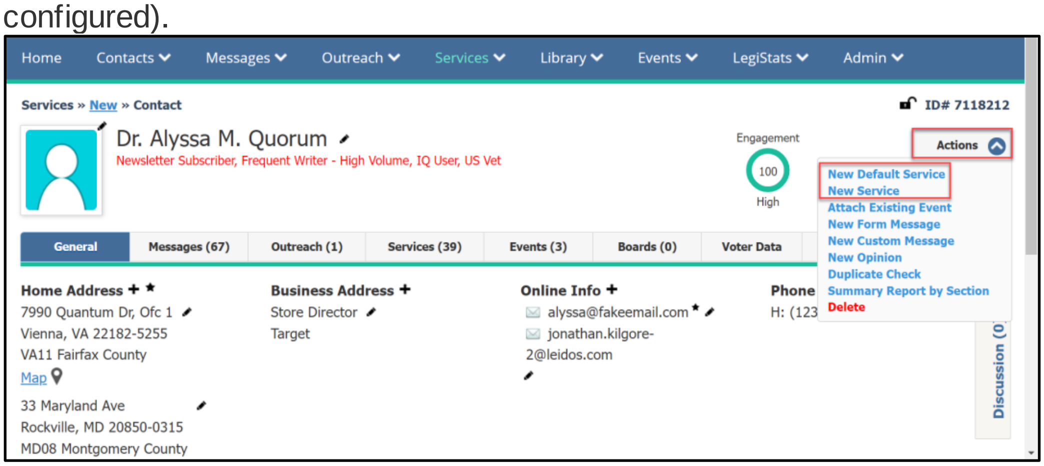

3. Click **Add Contact** button.



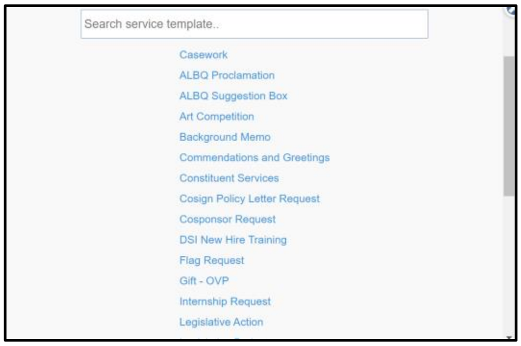

4. The Contact window appears with data you entered. Complete all the fields as needed. Click **Add & Open.**




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

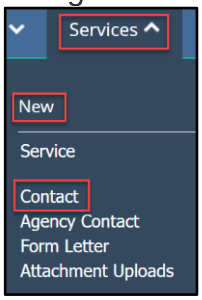



6. A list of Service templates for your office is displayed. Select the service.

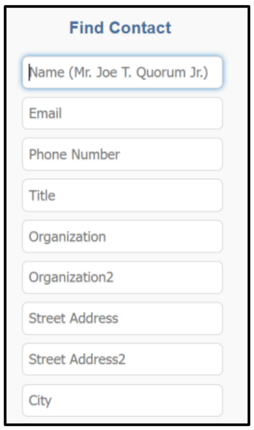

Search service template..
Casework
ALBQ Proclamation
ALBQ Suggestion Box
Art Competition
Background Memo
Commendations and Greetings
Constituent Services
Cosign Policy Letter Request
Cosponsor Request
DSI New Hire Training
Flag Request
Gift - OVP
Internship Request
Legislative Action

## *Creating a Service Record from an Existing Contact Record*

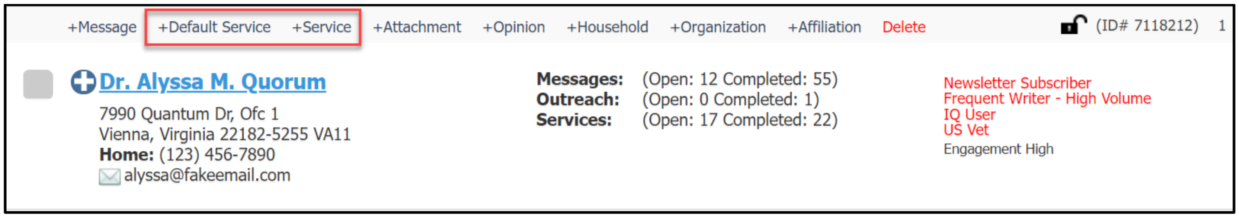
1. Navigate to **Services > New >Contact.**



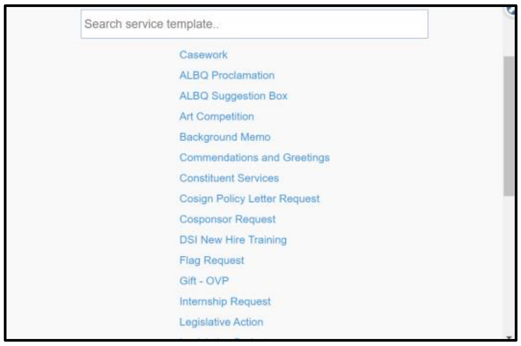

2. Enter data in the fields in the **Find Contact** section and select the **Find Existing Contacts** button to search for the Contact in IQ database. You can use one or more fields to search for the Contact.




3. 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.



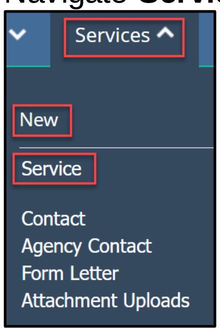

4. A list of Service templates for your office is displayed. Select the service.



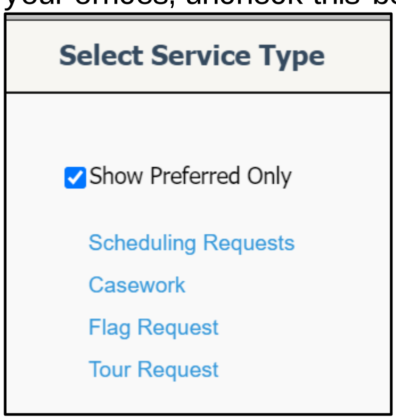

**Note:** You can also click on the Contacts name to enter their Contact record and create the New Service by clicking on the Action dropdown found in the Contact record.

### *Creating a Service Record from the Service Menu*

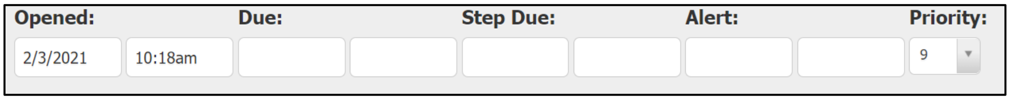
1. Navigate **Services > New > Service**.




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.



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:




   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**