

## Processing Schedule/Event Requests

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

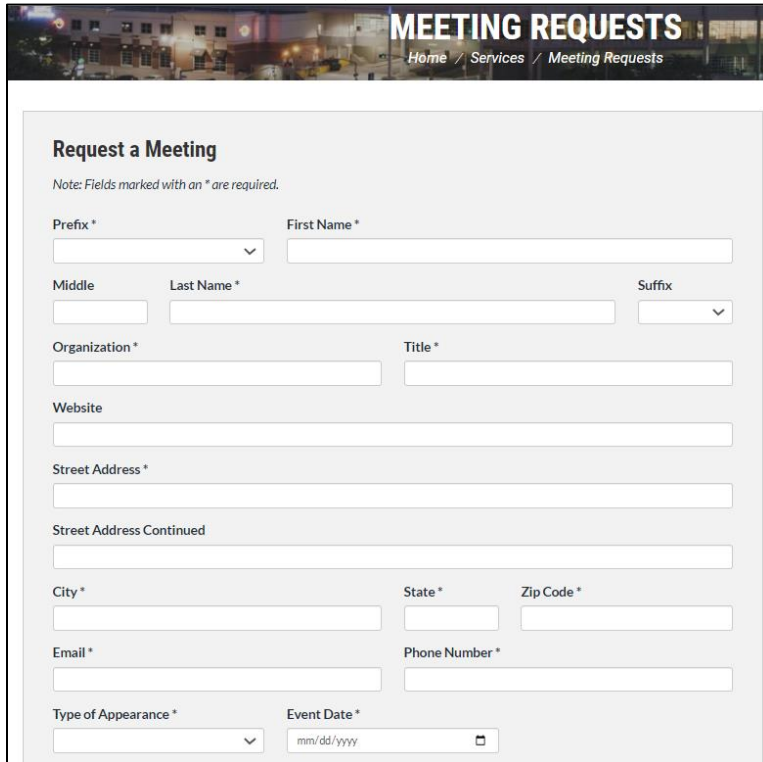
**Description:** These instructions teach users how to process a Member/Boss's schedule or event requests in IQ. A customized *Meeting Request Web Form* can be added to a Member/Boss's website\*. The information captured from this form is passed to IQ's *Scheduling Request Template*, which then becomes a record in IQ. This record can be synchronized with Microsoft Outlook calendar. As a result, a staff can maximize IQ as a scheduling tool while incorporating all the analytical data stored in IQ.

\* Contact your office IQ Consultant to configure these IQ events template for your office

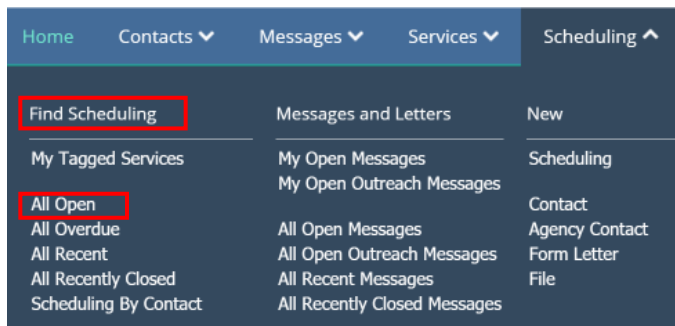
### ***Creating an Event using information from a Member's Meeting Request Form***

This is an example that describes how information entered into a Member's *Meeting Request Web Form* is used to populate and create a meeting/scheduling record in IQ.

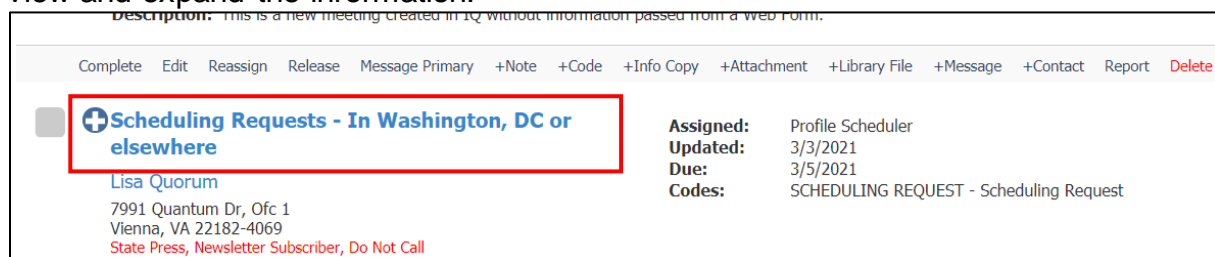
1. This is a sample *Meeting Request Web Form* found in a Member's website.



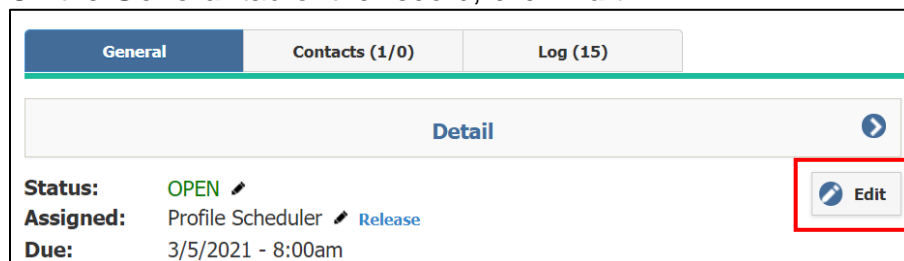
2. After the constituent completes and submits the information of the *Meeting Request Web Form*, IQ will automatically capture this information and use this information to populate and generate a scheduling service record in IQ. To access these requests, navigate to the **Scheduling > Find Scheduling > All Open**.



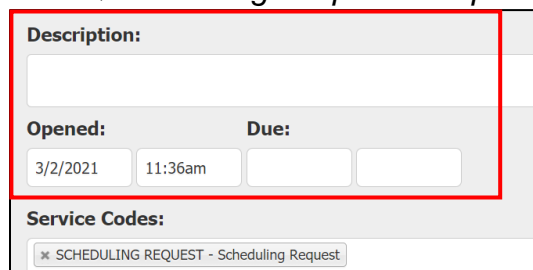
- The page will display all opened scheduling request records. Click the title of the record to view and expand the information.



- On the **General** tab of the record, click **Edit**.



- The *IQ Scheduling Request Template* is displayed. Complete the fields below.



- Under the **Event Data** section, complete the information. Note the following IQ specific fields:

Event Data		
<b>Type of Request</b>	<b>Calendar</b>	<b>Response Status</b>
Meeting Request	Joe Quorum	TBD
<b>Location</b>	<b>Review Status</b>	<b>Member Requested</b>
In Washington, DC or elsewh...	PENDING REVIEW	Yes
<b>Event Date</b>	<b>Link to Event</b>	<b>Speaking Role</b>
3/5/2021		TBD

- **Green:** these fields will be prepopulated with information that was entered on the Member's *Meeting Request Web Form*.
- **Red:** these fields may be prepopulated from the Member's *Meeting Request Web Form* or may need to be manually completed by the office staff.

7. Click **Save**.

<b>Save</b>	<b>Save and Route</b>	<b>Save without Closing</b>	<b>Cancel</b>
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8. Select **Actions > Create Calendar Event**.

Services » Results » Service ID# 801015

**OPEN** Scheduling Requests - In Washington, DC or elsewhere for [Lisa Quorum](#)

General Contacts (1/0) Log (34)

**Detail** > < **Activity**

Status: **OPEN** ✎  
Assigned: Profile Scheduler ✎ Release  
Due: 3/5/2021 - 8:00am

Actions

- Create Calendar Event
- Merge Services
- Print Summary
- Attach Contact
- Attach Contacts by List
- Attach Message
- Delete

Add a note... Post

9. A confirmation message is displayed. Click **Create**.

**Create Calendar Event**

You are about to create a new Event for the Requests Calendar:

Date: 3/5/2021  
Summary: CNN Interview

Click 'Create' to create the new Event or 'Cancel' to abort.

Create Cancel

10. Navigate to **Events > Views > Monthly**. The event is now included in your calendar in IQ.

Events » Results

**Monthly Calendar for Requests** (1 Results)

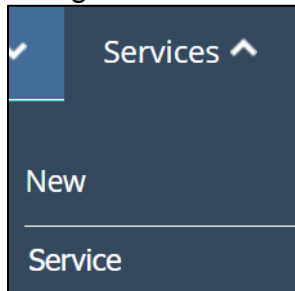
< Today Switch Calendar **March 2021** Day Week Month >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	1	2	3	4	<b>CNN Interview</b>	6
7	8	9	10	11	12	13

## Creating an Event within IQ

This is an example creating a meeting/scheduling record in IQ, which caters to offices that do not have the *Meeting Request Web Form* on their Member website.

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



2. A list of service templates\* is displayed. Select **Scheduling Requests**.

Select Service Type
<input checked="" type="checkbox"/> Show Preferred Only <a href="#">Scheduling Requests</a>

\*Contact your office IQ Consultant on how to configure the display settings of your service templates.

3. Refer to **step 5** through **step 10** of the *Creating an Event using information from a Member's Meeting Request Form* guide.