

Configuring a “Threat” Affiliation Code

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to create a “threat” affiliation code and apply it to a specific incoming message to notify and warn users regarding such email.

Note: This activity requires the user to have permission to create codes in IQ and to have access to the Admin module. Contact your office IQ Consultant for information regarding this activity.

1. Navigate to **Contacts > Utilities > Codes > Affiliation**.
2. Click **Add Code**.
3. Enter the affiliation code and description for the “threat” affiliation code. Click **Save**. Below is an example. Contact your Office IQ Consultant for the set up of codes in your office.

Add Affiliation Code

Code ID

Translation

Archive

Popup Message

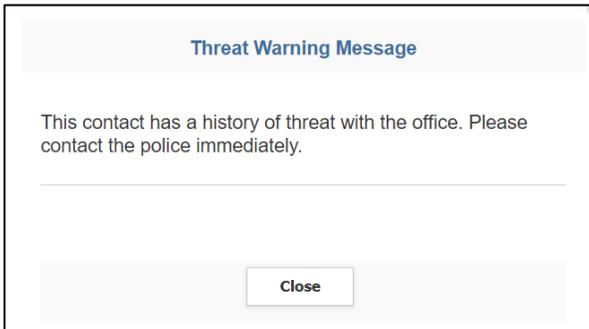
4. Navigate to **Admin > Setup and Configuration > System Settings > Contacts and Addresses**.
5. Scroll to the **Contacts and Address Rules** section and select the affiliation code entered in Step 3. Type an appropriate note in the **Threat Warning Message** text field.

Contact and Address Rules

<input type="text"/>	Maximum Number of Address Records Allowed for Each Contact Record
<input type="text" value="Editable"/>	Household Salutation Type
<input type="text" value="50"/>	Number of Contact Records selected by Universal Search to Show Detail
<input type="text" value="Always"/>	Display Secure Record Message Details
<input type="text" value="ALERT- THREAT WARNIN - ALERT- THRI"/>	Affiliation Code for Threat
<input type="text" value="This contact has a history of threat with the office. Please contact the police immediately."/>	Threat Warning Message

6. Click **Save**.

When an individual whose record is stored in IQ and is tagged with a “threat affiliation code”, anytime his/her contact record is referred within an Opinion Record or a Message, this popup window will display.



4 Contact and Address Settings

Contact Deletion

Yes Allow deletion of Contacts with Open or Closed Workflow records

Yes Allow deletion of Agency Contacts with Open or Closed Workflow records

Contact Record Page

<Make a Selection> Quick Report to Use with the Summary Tab of the Contact Record Page

(xxx) xxx-xxxx Display format for phone numbers

Primary or residential address in jurisdik When to display Verified Constituent Badge

Contact Type Ahead Search

`(SELECT nv12(birthdate,'Birthdate: '|TO_CHAR(birthdate,'mm/dd/yyyy'),'") FROM people p WHERE p.people_id = people_search.people_id)|' * '|F_GET_AFFILIATION_CODE_LIST(peopl e_search.people_id, 'CODETRANS')`

SQL of Additional Contact Data to display for Contact Type Ahead Search
 Example:
`(SELECT nv12(birthdate,'Birthdate: '|TO_CHAR(birthdate,'mm/dd/yyyy'),'") FROM people p WHERE p.people_id = people_search.people_id) or: (SELECT nv12(birthdate,'Birthdate: '|TO_CHAR(birthdate,'mm/dd/yyyy'),'") FROM people p WHERE p.people_id = people_search.people_id)|' * '|F_GET_AFFILIATION_CODE_LIST(people_search.people_id, 'CODETRANS')`

Columns to be included in the searched text
 Example:
`replace((SELECT listagg(DECODE(caf.field_name,'SSN','caf.value','VoterID','caf.value','') within GROUP (order by 1) FROM contact_adhoc_field caf where caf.contact_id = contact.contact_id),',')`

Comma list of tables to join to the people_search table...
 Example:
 contact

Where sql to join the tables to people_search
 Example:
`people_search.people_id = contact.people_id(+) AND`
 You must add the trailing AND!
 This should use outer joins to get the data otherwise the search may not show all people record.

Contact and Address Rules 5

9 Maximum Number of Address Records Allowed for Each Contact Record

Editable Household Salutation Type

50 Number of Contact Records selected by Universal Search to Show Detail

Always Display Secure Record Message Details

ALERT - Threat Warning Alert 6 Affiliation Code for Threat

Please contact the USCP immediately 7 Threat Warning Message

Import Set Rules

Add Emails as non-Primary if existing Primary engaged in last year

Address Checker

e:\ZipData\ Use Address Checker to Standardize Address Entries

Address Checker Data File Path

Keep Street Lines as Entered

Expand Street Address Parts

Always abbreviate post-directionals

Use Alternate ZIP+4 to Congressional District Lookup Table (if available)

Use City, County, State, Precinct and/or District from CSZ Code Table Instead of Address Checker Results (if CSZ code matches ZIP

Save Cancel