Creating/Updating Issue Codes

Market: House, Senate

Description: These instructions teach users how to create **Issue Codes** which tag incoming and outgoing messages with the issue they concern. These codes can be customized to be assigned to individual staffers and have phone scripts for staffers to read from when logging a call concerning that issue.
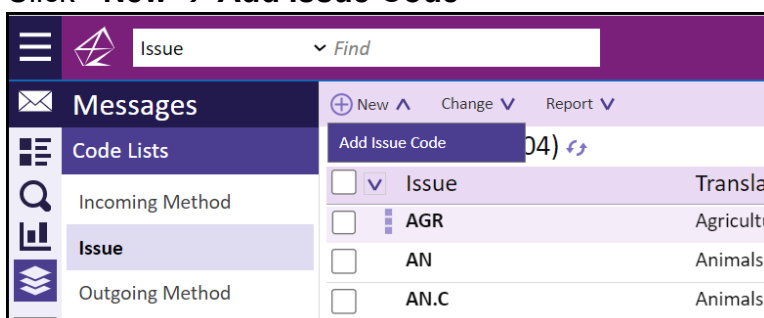
Create an Issue Code

1. Navigate to the **Messages Application**
2. Click on the [icon] icon.
3. Click on **Issue.**
4. Click **+New → Add Issue Code**

5. Fill in the following fields as needed:
   a. **Code:** The name of the code that will appear when searched (i.e. AGR, FIN, etc.)
   b. **Translation:** The description of the code (i.e. Agriculture, Finance, etc.)
   c. **Assigned:** The staffer who will be automatically assigned all Messages with this Issue code.
   d. **Default Approver:** The staffer who will be the default approver for all outgoing requested approval messages with this issue code.
   e. **Suggested Phone Script:** The script that will appear when logging a phone call with this issue code.
   f. **Pro/Con/Neutral:** Check this box to have IQ automatically generate pro, con, and neutral issue codes.

Add Issue Code   ✕

Issue Code

Code   Ⓐ

Translation   Ⓑ

☐ Archived

Assigned   Ⓒ

Default Approver   Ⓓ

Suggested Phone Script   Ⓔ

☐ Also Add Pro/Con/Neutral Issues (with .P, .C and .N extensions) Ⓕ

                                               Save   Close

6. Click **Save.**

Updating Issue Codes

1. Navigate to the **Messages Application**

2. Click on the [icon] icon.

3. Click on **Issue.**

4. Click on the [icon] icon next to the Issue code you wish to update.

5. Click on either of the following options:

   a. **Edit:** Allows the user to change the Translation, Assigned User, Default Approver, and Suggested Phone Script for the Issue Code

Edit Issue Code ✕

Issue Code

Banking and Finance

Code

BANK

Translation

Banking and Finance

☐ Archived

Assigned

~~Jonathan Kilgore~~

Default Approver

Suggested Phone Script

Talking points:
1) Banks are still safe

ID#BANK
Row 7

Save   Close

b. **Change in Records:** Allows the user to see how many Messages are associated with this Issue Code and replace it.

Change in Records ✕

Change Existing Records with Selected Code

BANK - Banking and Finance

377 records

Replace With

ID#BANK
Row 7

Save   Close