


## Creating a Service Record

**Market:** 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.

1. Search for a contact record using the **Find and Add a Contact** icon .
2. Click the radio button next to your existing Contact or, if the Contact does not exist, add in the rest of their information and click Add Contact.

Find or Add Contact

Search for Contact

Search by Nameline, Email or Phone

John Quorum

Prefix

First Name

Middle Name

Last Name

John

Quorum

Address

City

State

Zip

Email

Type

Cell Phone

Phone

Title

Organization

Search Affiliation

Add Affiliation

Add Agency Code

☐ Quorum, Jack  
Incomplete Address  
(475) 000-0000 (C)  
Newsletter Subscriber  
ID: 7118179  
Messages Open: 11 Closed: 32  
Services Open: 5 Closed: 22

☐ Quorum, Mr. and Mrs. Jack  
Incomplete Address  
Newsletter Subscriber; TRADESMAN; Veteran - Thank them for their service  
ID: 7184618  
Messages Open: 1 Closed: 0  
Services Open: 0 Closed: 0

☒ Quorum, Mr. John  
Incomplete Address  
ID: 7118163  
Messages Open: 41 Closed: 211  
Services Open: 17 Closed: 96

☐ Quorum, John  
Incomplete Address  
Veteran - Thank them for their service  
ID: 7183098  
Messages Open: 17 Closed: 83  
Services Open: 10 Closed: 8

☐ Quorum, John  
Incomplete Address  
ID: 7183755  
Messages Open: 0 Closed: 0  
Services Open: 1 Closed: 0


☐ Quorum, John  
Incomplete Address  
ID: 7184040  
Messages Open: 5 Closed: 0  
Services Open: 1 Closed: 0

☐ Quorum, John  
Incomplete Address  
ID: 7184054  
Messages Open: 1 Closed: 1  
Services Open: 1 Closed: 0

Add New Contact

Cancel

3. Click the **Add Service** button when viewing the Contact.



**Mr. John Quorum**

training@iqhelpdesk.com

February 8, 1962, Age: 63

Keep in mind their Veteran status. Thank them for their service!

National Press; Newsletter Subscriber; Very Important Person

General Discuss Logs

Email Addresses

- training@iqhelpdesk.com
- leidsokmteam@gmail.com Business

Phone Numbers

B: (704) 000-0000

Social Networks

	All	Open	Closed	Recent
Messages	252	41	211	3
Outreach	19	9	10	0
Services	113	17	96	6
Events	13	0	13	1
Board	3			
Memberships				

Member of a 3 Member Household

Mr. Tom Quorum

Lisa Quorum

12 Organization Contacts

Mr. Alek Quorum

Mr. October 23

Capt. Tom Cruise

Edit Add Message Log Call **Add Service** Add Event

4. Select the appropriate service and click **Continue** button.
  - a. **\*Note:** If you do not see the Service you need listed, click on **Add to New Any Template**.

Create new Service with this Contact as Primary Person

Please select an option

☐ Add to New Casework
 ☐ Add to New Flag Request (Web - Pay.gov)
 ☐ Add to New Tour Request
 ☐ Add to New Meetings
 ☐ Add to New Any Template

Continue

Cancel

- Enter all necessary information in the Edit {service} window. Click through and enter all data on the additional tabs at the top. Be sure to also include a **Service Code**.

Edit Casework

Summary Case Information Digital Privacy Release

Description

Opened

Date 08/26/2025 Time 05:01 PM

Alert

Date mm/dd/yyyy Time --:--

Service Codes

Process Status

No Value

Constituent Savings: Dollar Amount

Send Follow Up Survey: (After Case Closure)

No

Resolution:\*

Resolution: \*Required to Close

Activity Discuss

Add a note...

Post

Search...

All Message Notes Attachments

Process Case Begun 8/26/2025 - 05:01 PM

Complete

ID#802355 Row 1

Save & Close

Save

Close

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