

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

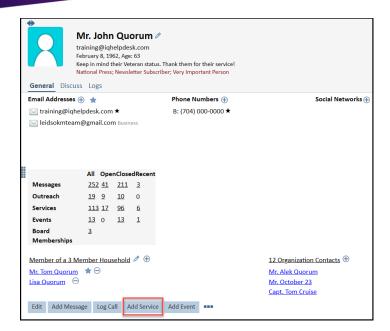


Add New Contact Cancel

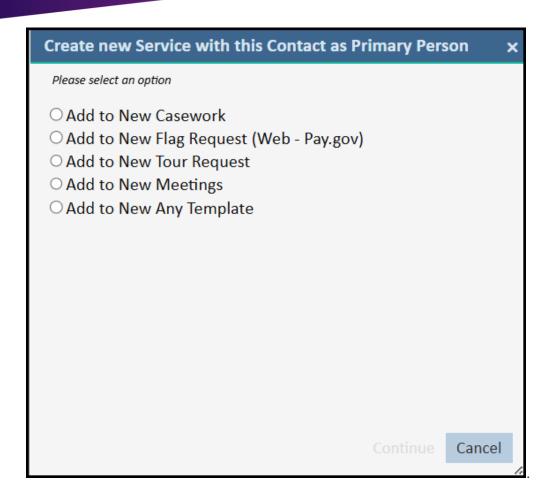
rest of their information and click Add Contact. Find or Add Contact Search for Contact Search by Nameline, Email or Phone Ouorum, Jack ID: 7118179 John Quorum Messages Open: 11 Closed: 32 (475) 000-0000 (C) Services Open: 5 Closed: 29 First Name Last Name Prefix John Middle Name Quorum Ouorum, Mr. and Mrs. Jack ID: 7184618 Incomplete Address
Newsletter Subscriber; TRADESMAN; Veteran - Thank them for their Messages Open: 1 Closed: 0 Services Open: 0 Closed: 0 Address Quorum, Mr. John ID: 7118163 Q Messages Open: 41 Closed: 211 ▼ Zip City Services Open: 17 Closed: 96 Type **Fmail** Cell Phone Phone Ouorum, John ID: 7183098 Messages Open: 17 Closed: 83 Organization veteran - mank mem for meir service Services Open: 10 Closed: 8 Ouorum, John ID: 7183755 Search Affiliation Incomplete Address Messages Open: 0 Closed: 0 Services Open: 1 Closed: 0 **▼**⊕ Add Affiliation ID: 7184040 Messages Open: 5 Closed: 0 **₩**⊕ Add Agency Code Services Open: 1 Closed: 0 O Quorum, John ID: 7184054 Incomplete Address Messages Open: 1 Closed: 1 Services Open: 1 Closed: 0

Click the Add Service button when viewing the Contact.

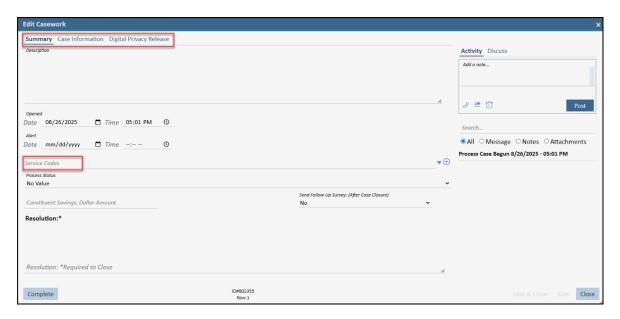




- 4. Select the appropriate service and click Continue button.
 - a. *Note: If you do not see the Service you need listed, click on Add to New Any Template.



5. 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**.



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