

## **Using the Mobile Entry Quick Action**

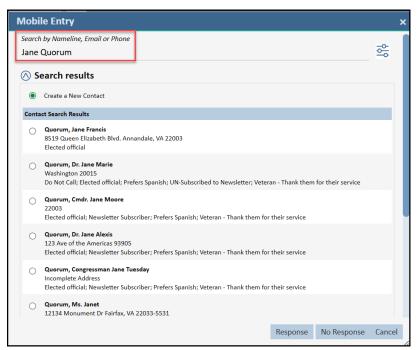
Market: House, Senate

**Description:** Mobile Entry is a Quick Action designed to help users capture constituent interactions and/or create new Constituent Services while using IQ from their mobile device.

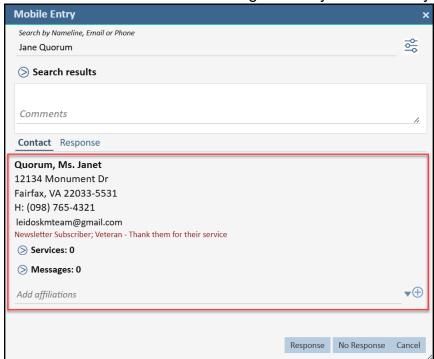
1. Click on the Mobile Entry icon.



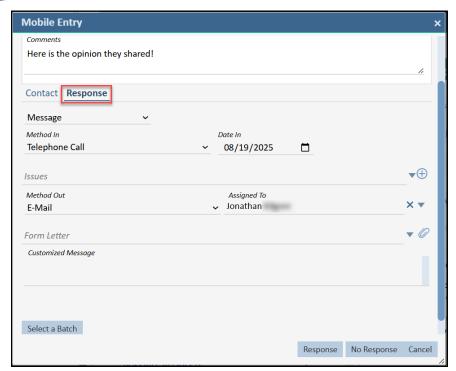
2. In the Mobile Entry window, type the constituents name, email or phone number into the first field. If more search options are needed, click on the



**3.** Create a new contact or select the individual. You can then choose to see the contact details which includes Service and Messages activity and the ability to add Affiliation Codes.



- **4.** If using Mobile Entry to log a new Phone Call or Opinion, write the constituent's Comments in the Comments field.
- **5.** Tap on response to add additional details to the message, including issue codes, method out, assigned to, etc.



- **6.** If the Call/Opinion will require a follow up response, tap on **Response**. If no follow up is needed, tap on **No Response**.
  - a. \*Note\*: If the Constituent needs a new Service Request created instead, tap on the Message dropdown and select the appropriate Service. The Comments will now be the Service Description, you can assign the Service to the appropriate staffer, and then tap on Service to finish creating the Request.

