Closing and Reopening a Service Record

Market: House, Senate

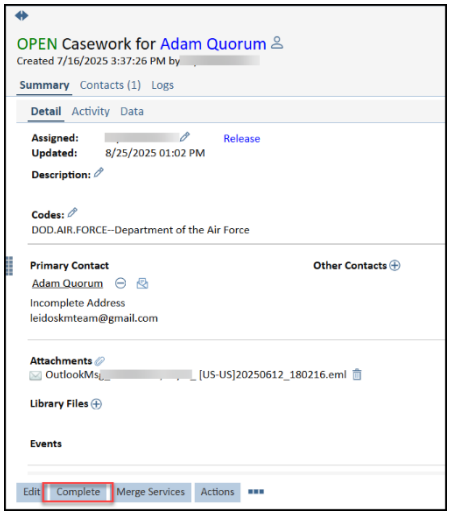
Description: These instructions teach users how to close a service record or reopen a closed service record in IQ.

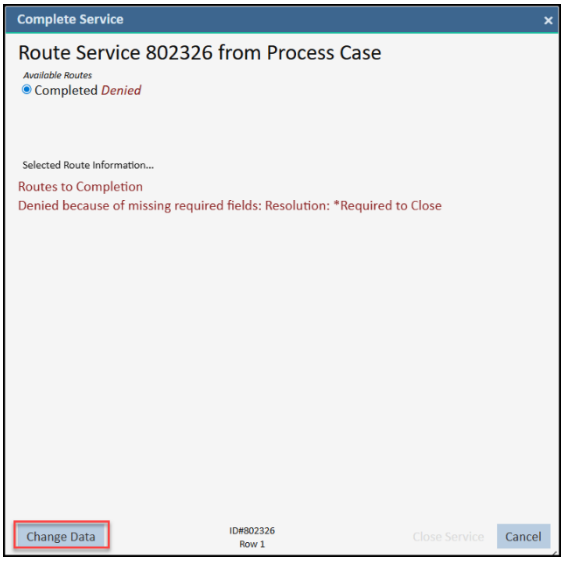
Click the following link to be brought straight to the topic:

Finding and Reopening a Closed Service

Closing a Service Record

1. Find the active service record assigned to you.
2. Select **Complete**.
3. If additional information is needed before the Service can be closed, you will be prevented from closing the Service and must click **Change Data** to add the missing information.





4. Complete the information in the **Complete Service** window. Click **Save**.

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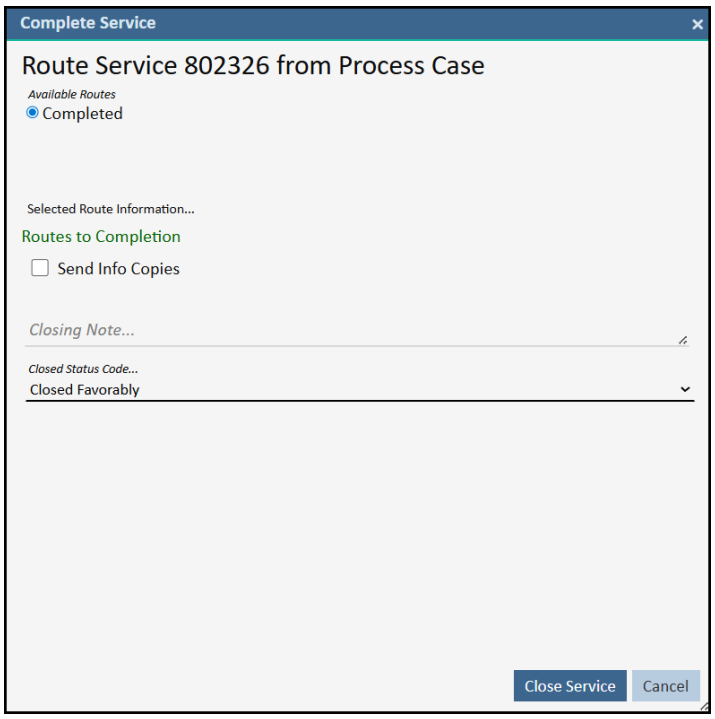

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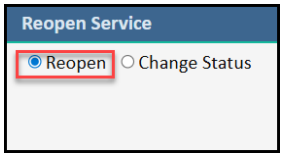
Finding and Reopening a Closed Service

Note: You must have specific security permissions to reopen a closed Service. Talk to your IQ Consultant if you don't have permission and need it enabled.

1. In the Services application, navigate to the view **Recently Closed Services**. This will show Services closed over the past 30 days.
    a. For Services closed beyond 30 days search for the Contact record and look in their history of closed Services.
2. Select either in the detail record in the bottom left corner, or next to the service name in the list view of your services.
3. Select **Reopen**.
4. In the Reopen Service window, select **Reopen → Save**.



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