
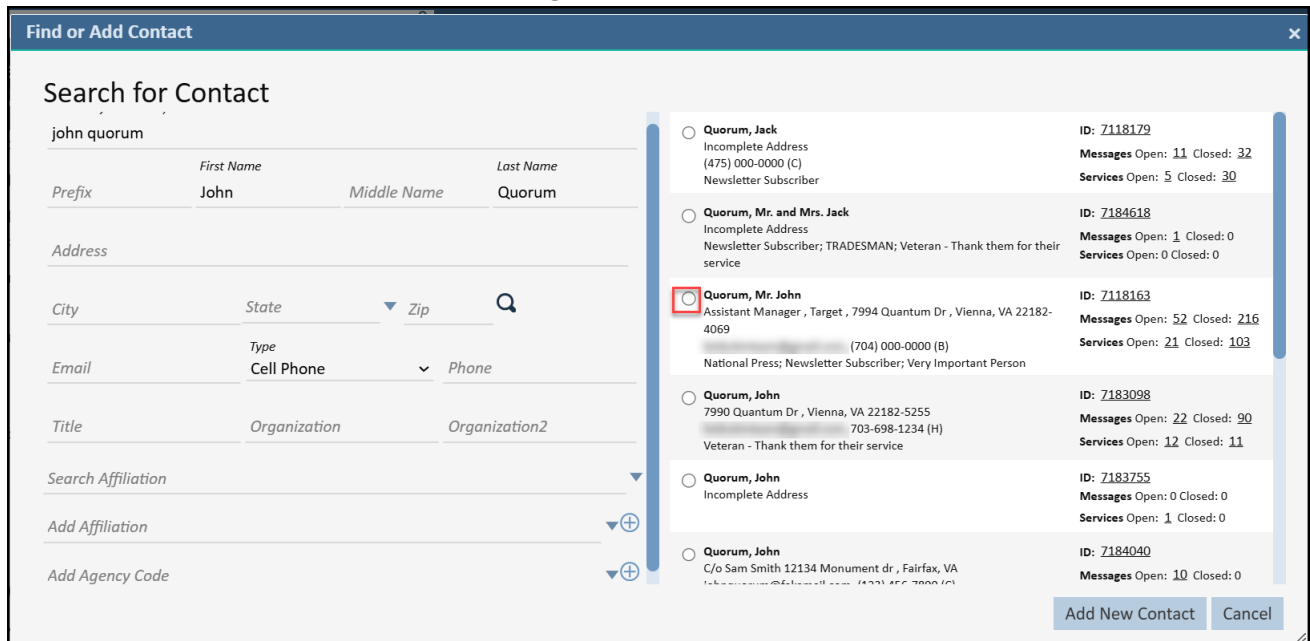


## Creating a Service Record

**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**

john quorum

| Prefix | First Name | Middle Name | Last Name |
|--------|------------|-------------|-----------|
|        | John       |             | Quorum    |

Address

City State Zip

Email Type Phone

Title Organization Organization2

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: 30
- ☐ **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**  
Assistant Manager, Target, 7994 Quantum Dr, Vienna, VA 22182-4069  
(704) 000-0000 (B)  
National Press; Newsletter Subscriber; Very Important Person  
ID: 7118163  
Messages Open: 52 Closed: 216  
Services Open: 21 Closed: 103
- ☐ **Quorum, John**  
7990 Quantum Dr, Vienna, VA 22182-5255  
703-698-1234 (H)  
Veteran - Thank them for their service  
ID: 7183098  
Messages Open: 22 Closed: 90  
Services Open: 12 Closed: 11
- ☐ **Quorum, John**  
Incomplete Address  
ID: 7183755  
Messages Open: 0 Closed: 0  
Services Open: 1 Closed: 0
- ☐ **Quorum, John**  
C/o Sam Smith 12134 Monument dr, Fairfax, VA  
ID: 7184040  
Messages Open: 10 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 |
|--------------------|-----|------|--------|--------|
| <b>Messages</b>    | 252 | 41   | 211    | 3      |
| <b>Outreach</b>    | 19  | 9    | 10     | 0      |
| <b>Services</b>    | 113 | 17   | 96     | 6      |
| <b>Events</b>      | 13  | 0    | 13     | 1      |
| <b>Board</b>       | 3   |      |        |        |
| <b>Memberships</b> |     |      |        |        |

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** x

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

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**.

Opened

Date01/27/2026Time11:48 AM

Alert

Datemm/dd/yyyyTime--:-- --

Attachments

Service Codes

Process Status

No Value

Constituent Savings: Dollar Amount

No

Resolution:\*

Complete

ID#802436  
Row 1

ActivityDiscuss

Add a note...

Post

Search...

All

Message

Notes

Attachments

Process Case Begun 1/27/2026 - 11:48 AM

Save & Close

Save

Close

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