

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	Q

Email

Type	Cell Phone	Phone

Title

Organization	Organization2

Search Affiliation

Add Affiliation

Add Agency Code

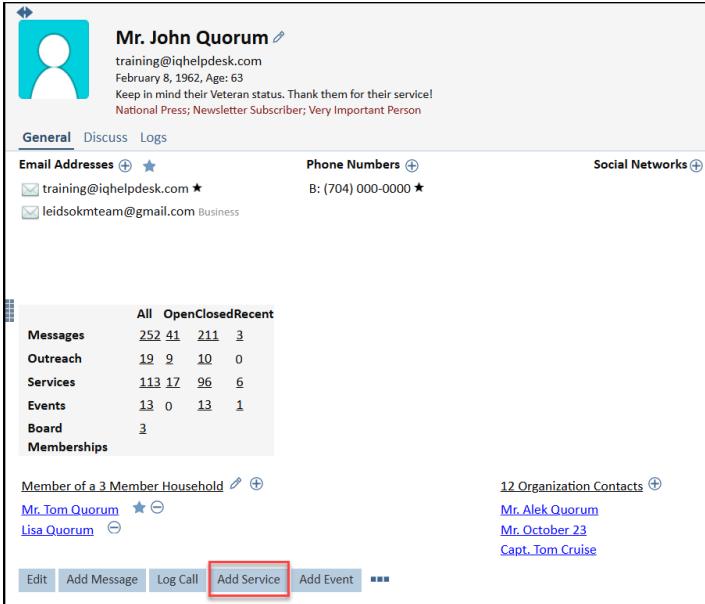
Contact List

- Quorum, Jack**
Incomplete Address
(475) 000-0000 (C)
Newsletter Subscriber
- Quorum, Mr. and Mrs. Jack**
Incomplete Address
Newsletter Subscriber; TRADESMAN; Veteran - Thank them for their service
- Quorum, Mr. John**
Assistant Manager , Target , 7994 Quantum Dr , Vienna, VA 22182-4069
(704) 000-0000 (B)
National Press; Newsletter Subscriber; Very Important Person
- Quorum, John**
7990 Quantum Dr , Vienna, VA 22182-5255
703-698-1234 (H)
Veteran - Thank them for their service
- Quorum, John**
Incomplete Address
- Quorum, John**
C/o Sam Smith 12134 Monument dr , Fairfax, VA

Actions

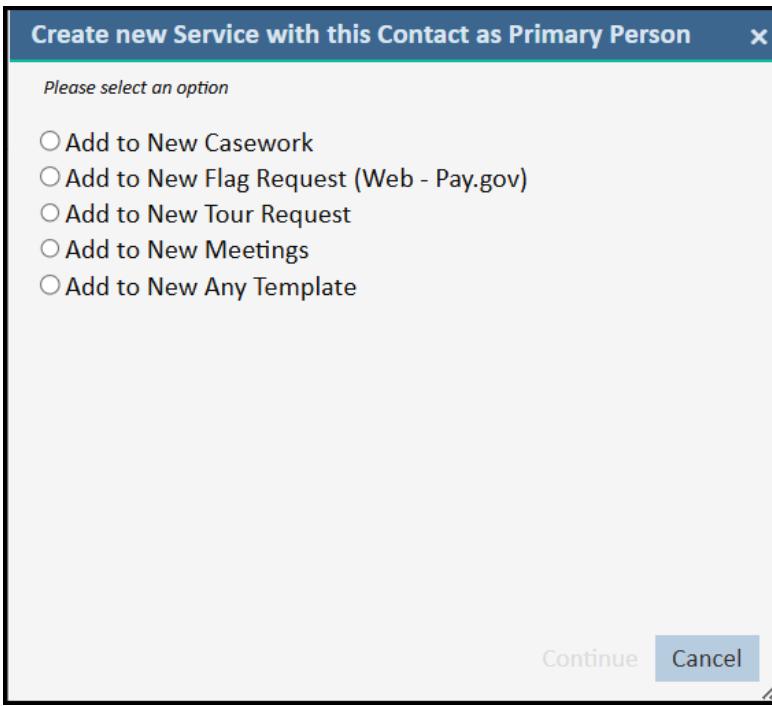
Add New Contact | Cancel

3. 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**.

Edit Casework

Description

Opened Date 01/27/2026 Time 11:48 AM

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

Attachments

Service Codes

Process Status No Value

Constituent Savings: Dollar Amount

Send Follow Up Survey: (After Case Closure)
No

Resolution:*

Complete

ID#802436
Row 1

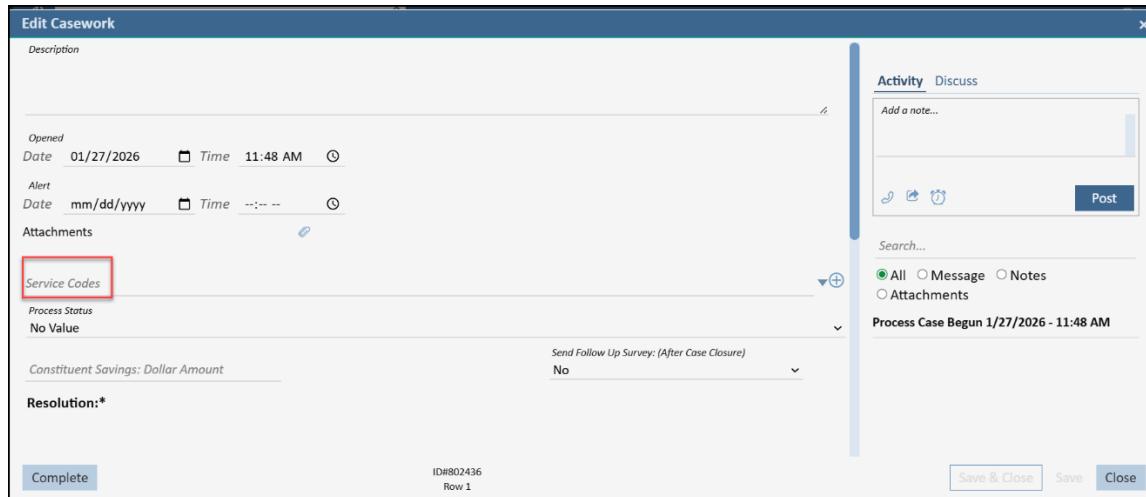
Activity Discuss
Add a note...

Post

Search...
 All Message Notes
 Attachments

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

Save & Close Save Close



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