

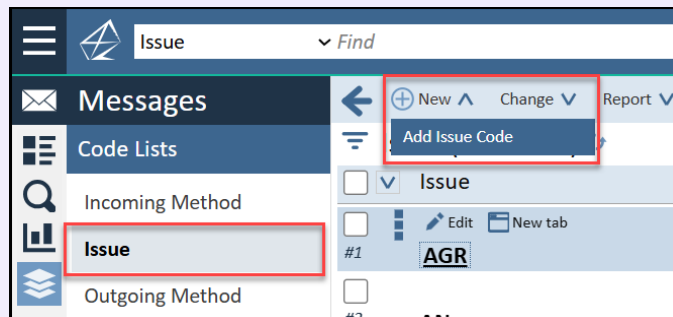
Creating/Updating Issue Codes

Market: House, Senate

Description: These instructions teach users how to create **Issue Codes** which tag incoming and outgoing messages with the issue they concern. These codes can be customized to be assigned to individual staffers and have phone scripts for staffers to read from when logging a call concerning that issue.

Create an Issue Code

1. Navigate to the **Messages Application**
2. Click on the  icon.
3. Click on **Issue**.
4. Click **+New → Add Issue Code**



5. Fill in the following fields as needed:
 - a. **Code:** The name of the code that will appear when searched (i.e. AGR, FIN, etc.)
 - b. **Translation:** The description of the code (i.e. Agriculture, Finance, etc.)
 - c. **Assigned:** The staffer who will be automatically assigned all Messages with this Issue code.
 - d. **Default Approver:** The staffer who will be the default approver for all outgoing requested approval messages with this issue code.
 - e. **Suggested Phone Script:** The script that will appear when logging a phone call with this issue code.
 - f. **Pro/Con/Neutral:** Check this box to have IQ automatically generate pro, con, and neutral issue codes.

The screenshot shows a dialog box titled "Add Issue Code" with a close button (X) in the top right corner. The dialog contains the following fields and controls, each marked with a red callout letter:

- A:** Points to the "Issue Code" label above the "Code" input field.
- B:** Points to the "Translation" label above the "Translation" input field.
- C:** Points to the "Assigned" label above a dropdown menu.
- D:** Points to the "Default Approver" label above a dropdown menu.
- E:** Points to the "Suggested Phone Script" label above a text area.
- F:** Points to the checkbox labeled "Also Add Pro/Con/Neutral Issues (with .P, .C and .N extensions)".

At the bottom right of the dialog are "Save" and "Close" buttons.

6. Click **Save**.

Updating Issue Codes

1. Navigate to the **Messages Application**

2. Click on the  icon.

3. Click on **Issue**.

4. Click on the three dot icon or the edit icon for the Issue code you wish to update.



5. Click on either of the following options:

- Edit:** Allows the user to change the Translation, Assigned User, Default Approver, and Suggested Phone Script for the Issue Code

Edit Issue Code

Issue Code

Agriculture

Code

AGR

Translation

Agriculture

☐ Archived

Assigned

Default Approver

Suggested Phone Script

Please say the following:

ID#AGR
Row 1

Save

Close

- b. **Change in Records:** Allows the user to see how many Messages are associated with this Issue Code and replace it.

