

Adding Service Codes and Agency Contacts

Market: House, Senate

Description: In IQ, **Service Codes** refer to codes for agencies that assist with the service. When a contact is connected to a Service Code, they are referred to as an **Agency Contact**. These instructions teach users how to create service codes and agency contacts.

Click the following links to be brought to the following topics:

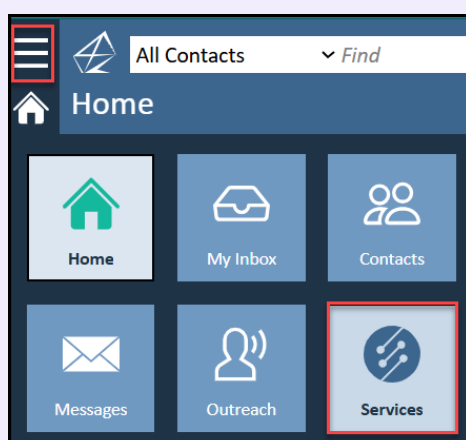
[Use a Service Code to Create an Agency Contact](#)

[Create an Agency Contact from a New Contact Record](#)

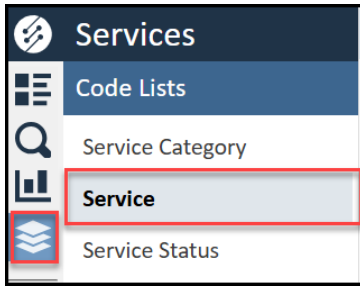
[Attach Agency Contacts in a Service Record](#)

Creating a Service Code

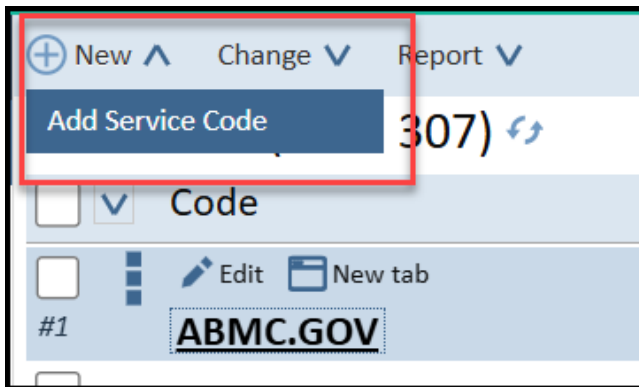
1. Navigate to the **Services** application.



2. Select the **Code Lists and Utilities** option from the Action Icons, then select **Service**.



3. A complete list of Service Codes appears. To add a new service code, click **+New → Add Service Code**.



4. Complete the fields below.

 A screenshot of a form titled 'Add Service Code'. The form has a header bar with the title and a close button. Below the header, there are several input fields: 'Service' (with the value 'New'), 'Code', 'Translation', 'Archived' (checkbox), 'Category' (dropdown), 'Webform Staff Assignment' (dropdown), 'Attach Agency Contacts' (checkbox), and 'ProcessTime'. At the bottom right, there are 'Save' and 'Close' buttons.

- Enter a **Code** name. Typically, this is a shortened version of the code name.

- Enter a **Translation**. This is generally a more detailed explanation of the code.
- The **Archived** check box is used if you wish to remove the code from active use. Once used, codes cannot be deleted as they are associated with records.
- Include a **Category** if you wish to associate this code with a category.
- The **Webform Staff Assignment** assigns new Services with this code to a particular user if the Service is created using a Webform.
- If you would like all Agency Contacts with this Service Code included in every Service record with this code, check the **Attach Agency Contacts** check box. Leaving the box unchecked will allow you to manually attach Agency Contacts each time you add this Service Code.
- If you would like a default Due Date to appear in a Service record with this Service Code, enter the default **process time**.

5. Click **Save** to save your changes.

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Use a Service Code to Create an Agency Contact

Agency Contacts are typically people that work at an outside agency or office and assist in resolving issues you are handling in IQ Services. Agency Contacts are distinguished by attaching an Agency Code to a Contact record. When that same Agency Code is attached to a new Service record as a Service Code, all Contact records with the same code can be made to appear in the Service and can be easily selected for messaging. This means you spend less time searching for your contact and can also search and report on all contacts in an agency using the Agency Code or Category search.

Create an Agency Contact from a New Contact Record

1. Click on the **Find or Add a Contact** action icon .
2. Create the contact record and then click **Edit** in the contact record.

Ms. Nancy Quorum
leidoskmteam@gmail.com

General Discuss Logs

Email Addresses + **Phone Numbers** +

leidoskmteam@gmail.com ★

Home + ★ **Business** +

Incomplete Address ✎

Affiliations ✎

Attachments 📎

Messages		Services	
All Messages	0	All Services	0
Open Messages	0	Open Services	0
Closed Messages	0	Closed Services	0
Recent Messages	0	Recent Services	0

Edit Add Message Log Call Add Service Add Event ...

3. In the Agency Code field, click in the drop down and select the appropriate **Agency Code**. Click the **Save & Close** button when finished.

Edit Contact

Ms. Nancy Quorum

Prefix Ms. First X Nancy Middle

Formal Salutation Ms. Quorum

Household Salutation Ms. Quorum and Family

Couple Name

Couple Informal Salutation

Comments

Attachments 📎

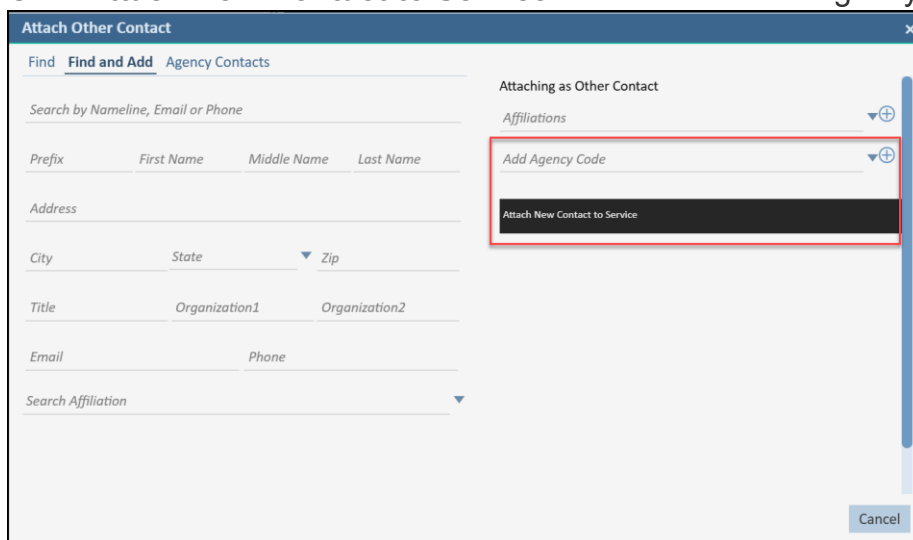
Affiliations

Agency Code

ID#7184816
Row 1

Create/Attach Agency Contacts in a Service Record

1. Search for and open the service record.
2. In the service, click  next to **Other Contacts**.
3. Click the **Find and Add** tab. Add your contact information, then click **Add Agency Code** and select the Agency this contact works for.
4. Click **Attach New Contact to Service** to create the new Agency Contact.



Attach Other Contact

Find **Find and Add** Agency Contacts

Search by Name/line, Email or Phone

Prefix First Name Middle Name Last Name

Address

City State Zip

Title Organization1 Organization2

Email Phone

Search Affiliation

Attaching as Other Contact

Affiliations

Add Agency Code

Attach New Contact to Service

Cancel

5. To find existing Agency contacts, select the **Agency Contacts** tab. IQ will conduct a search for Agency contacts based off the service code(s) on the case.
6. Select the correct agency contact, then click **Attach to Service**.



Attach Other Contact

Find Find and Add **Agency Contacts**

Search Agency Contacts

Contact Search Results

☒ **Hillman, Ian** ID: 7117926
Consular Officer, Department of State, 189 Russell
Senate Office Building, U.S. Senate, Washington, WA
20510-0001
jonathan.kilgore-2@leidos.com, Phone: (202) 228 -
1605 (B) Messages Open: 5 Closed: 7
Services Open: 2 Closed: 3

☐ **Kaldahl, Ryan** ID: 7117928
Acting Assistant Secretary, U.S. Department of State,
Bureau of Legislative Affairs, 2201 C Street NW,
Washington, WA 20520-0099
Joy.betaharon@leidos.com, Phone: (202) 647 - 1050
(B) Messages Open: 4 Closed: 7
Services Open: 2 Closed: 7

☐ **Quorum, Bea** ID: 7184710
Incomplete Address
bea.quorum@fakemail.com, (123) 456-7890 (H) Messages Open: 0 Closed: 0
Services Open: 0 Closed: 0

☐ **London, US Consulate** ID: 7184711
Incomplete Address
usconsulatel@fakemail.com Messages Open: 0 Closed: 0
Services Open: 0 Closed: 1

Attach to Service Cancel

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