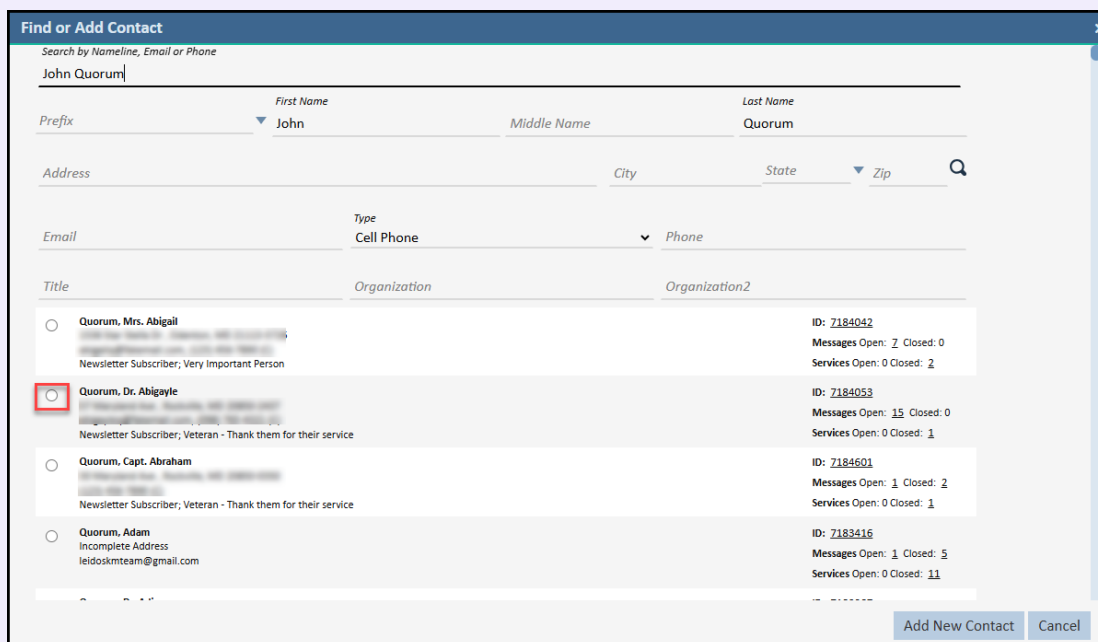


Creating a Service Record

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 by Name, Email or Phone

John Quorum

Prefix First Name Middle Name Last Name

John Quorum

Address City State Zip

Email Type Cell Phone Phone

Title Organization Organization2

☐ Quorum, Mrs. Abigail ID: 7184042
Messages Open: 7 Closed: 0
Services Open: 0 Closed: 2

☒ Quorum, Dr. Abigail ID: 7184053
Messages Open: 15 Closed: 0
Services Open: 0 Closed: 1

☐ Quorum, Capt. Abraham ID: 7184601
Messages Open: 1 Closed: 2
Services Open: 0 Closed: 1

☐ Quorum, Adam ID: 7183416
Messages Open: 1 Closed: 5
Services Open: 0 Closed: 11

Add New Contact Cancel

3. Click the **Add Service** button when viewing the Contact.

Dr. Abigayle Quorum
 leidoskmtteam@gmail.com
 Newsletter Subscriber; Veteran - Thank them for their service

General | Discuss | Logs

Email Addresses (+)
 leidoskmtteam@gmail.com ★

Phone Numbers (+)
 C: (098) 765-4321 ★

Home (+) ★
 MD08 Montgomery

Business (+)

Head of a 1 Member Household (+)

Affiliations (+)
 EMAIL.OPTIN--Newsletter Subscriber;
 TEACHER--Teachers; VET--Veteran

Attachments (+)

Messages
 All Messages: 15
 Open Messages: 15

Services
 All Services: 1
 Open Services: 0

Outreach
 All Outreach: 0
 Open Outreach: 0

Buttons: 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**.

The screenshot shows the 'Edit Casework' window with the following elements:

- Description:** A large text area for case details.
- Opened:** 07/14/2026 02:19 PM. Includes a calendar icon and a clock icon.
- Alert:** mm/dd/yyyy --:--:--. Includes a calendar icon and a clock icon.
- Service Codes:** A dropdown menu with a red box around it and a plus icon.
- Attachments:** A link to add attachments.
- Process Status:** A section with a dropdown arrow.
- Constituent Savings: Dollar Amount:** A text field.
- Send Follow Up Survey: (After Case Closure):** A dropdown menu with 'No' selected.
- Resolution:*** A section with a text field.
- Resolution: *Required to Close:** A text field.
- Case Information:** A tab with a blue underline.
- Digital Privacy Release:** A sub-tab.
- Intake Method:** A dropdown menu with 'No' selected.
- Privacy Release:** A dropdown menu with 'No' selected.
- Last Contacted:** A text field.
- Contact Method:** A dropdown menu with 'ID#802517 Row 1' selected.
- Complete:** A button.
- Activity:** A tab with a blue underline.
- Discuss:** A sub-tab.
- Add a note...:** A text area for adding notes.
- Post:** A button.
- Search...:** A search bar.
- All Message Notes Attachments:** Radio buttons for filtering activity.
- Process Case Begun 7/14/2026 - 2:19 PM:** A timestamp.
- Save & Close:** A button.
- Save:** A button.
- Close:** A button.

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