

Creating Codes

Market: House, Senate, FSL

Description: This guide provides instruction on how to add application specific codes (e.g., Affiliation codes, Service codes, Issue code, Batch codes, etc.) in IQ5. Note that you need proper security permissions to be able to create/edit these codes. If you cannot, reach out to your IQ Consultant to gain permission.

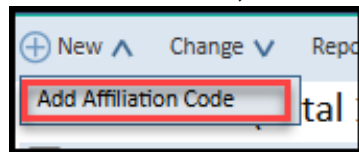
1. Within any IQ application (e.g., Contacts, Messages, Services, Library, Events, LegiStats), select **Code Lists and Utilities**.



2. Depending on the module selected, the type of codes that are available will be displayed. Follow the instructions below for each kind of code:
 - a. **Affiliation Codes:**
 - i. Select **Affiliation**.



- ii. Click  , then **Add Affiliation Code**.



- iii. Enter the information required for the new code. The fields are defined as follows:
1. **Code:** The shorter text that appears on reporting and Contact records.
 2. **Translation:** The definition (or description) of the Code above.
 3. **Archived:** Check this box to make this code no longer available for use (typically done when a code is no longer useful and is done by clicking the **Edit** button on an existing affiliation or by selecting codes in mass and clicking **Change → Archive**).
 4. **Popup Message:** Write text here that will appear in red text underneath a contact records name when viewing them in a list or in the reading pane of the record (e.g. Newsletter Subscriber, Veteran – thank them for their service, etc.)

Add Affiliation Code

Affiliation
New

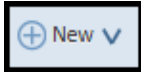
Code

Translation

☐ Archived

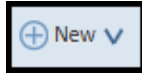
Popup Message

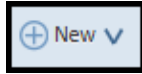
Save Close

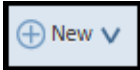
- iv. Click **Save**.
- b. **Issue Codes:**
 - i. Select **Issue**.
 - ii. Click , then **Add Issue Code**.
 - iii. Enter the information required for the new code. The fields are defined as follows:
 1. **Code:** The shorter text that appears on reporting and Message records. Indicates at a glance what the legislative issue is that the Message is concerned with.
 2. **Translation:** The definition (or description) of the Code above.
 3. **Archived:** Check this box to make this code no longer available for use (typically done when a code is no longer useful and is done by clicking the **Edit** button on an existing affiliation or by selecting codes in mass and clicking **Change → Archive**).
 4. **Assigned:** Select a staffer to be automatically assigned Messages that are tagged with this Issue.
 5. **Default Approver:** Select a staffer who will be the default approver (as needed) of Messages tagged with this Issue .
 6. **Suggested Phone Script:** Type out text that you would like staffers to see when logging a Phone Call that they tag with this Issue code. Commonly used to ensure certain Office talking points are met during calls on specific Issues.

7. **Pro/Con/Neutral Issues:** Check this box to have IQ create 3 additional Codes (Pro, Con, & Neutral). These additional codes can be used to more specifically indicate how a Constituents Message feels about a particular Issue and also allow the User to select this Issue when using the Quick Action, Issue Tally.

- iv. Click **Save**.
- c. **Batch Codes:**
 - i. Select **Batch Code**.
 - ii. Click , then **Add Batch Code**.
 - iii. Enter the information required for the new code. The fields are defined as follows:
 - 1. **Code:** The shorter text that appears on reporting and Batches.
 - 2. **Translation:** The definition (or description) of the Code above.
 - 3. **Archived:** Check this box to make this code no longer available for use (typically done when a code is no longer useful and is done by clicking the **Edit** button on an existing affiliation or by selecting codes in mass and clicking **Change → Archive**).
 - iv. Click **Save**.
- d. **Service Codes:**
 - i. Select **Service**.



- ii. Click , then **Add Service Code**.
- iii. Enter the information required for the new code. The fields are defined as follows:
 1. **Code:** The shorter text that appears on reporting and Service records. Indicates the kind of Service this record is and/or the specific Agency/Department the Casework Service type is for (such as FEMA, VA, SSA, etc.).
 2. **Translation:** The definition (or description) of the Code above.
 3. **Archived:** Check this box to make this code no longer available for use (typically done when a code is no longer useful and is done by clicking the **Edit** button on an existing affiliation or by selecting codes in mass and clicking **Change → Archive**).
 4. **Category:** Select what Service type this Code should be associated with (i.e. Casework, Flag Requests, Tour Requests, etc.).
 5. **Webform Staff Assignment:** Select the staffer who will automatically be assigned Services tagged with this code that are submitted into IQ via an IQ Webform. For example, if the Webform submitted a Casework request with the Service code SSA (for Social Security Agency) and a staffer was selected in this field, the Case would automatically be assigned to them.
 6. **Attach Agency Contacts:** Check this box to have all associated Agency contacts with this code automatically attach in the Other Contacts section of the Service.
 7. **Process Time:** Indicate a number of hours that a Service with this code would typically take to process.

- iv. Click **Save**.
- e. **Document Codes:**
 - i. Select **Document**.
 - ii. Click , then **Add Document Code**.
 - iii. Enter the information required for the new code. The fields are defined as follows:
 1. **Code:** The shorter text that appears on reporting and Library records (such as Form Letters).
 2. **Translation:** The definition (or description) of the Code above.
 3. **Archived:** Check this box to make this code no longer available for use (typically done when a code is no longer useful and is done by clicking the **Edit** button on an existing affiliation or by selecting codes in mass and clicking **Change → Archive**).

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