

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:

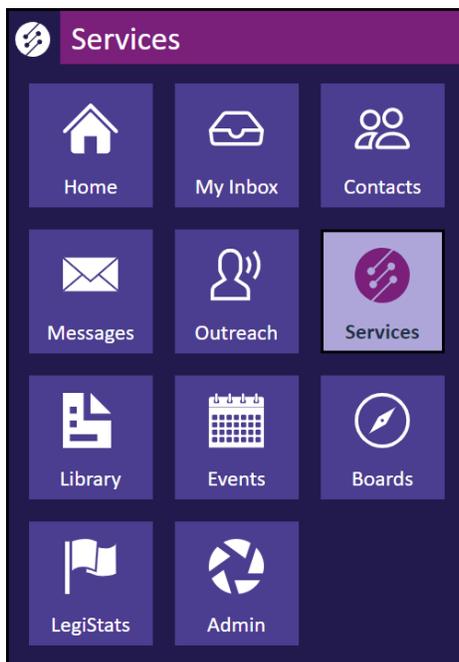
[Use a Service Code to Create an Agency Contact](#)

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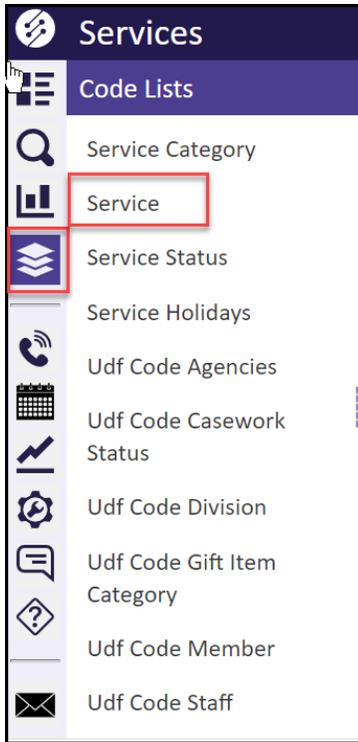
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Creating a Service Code

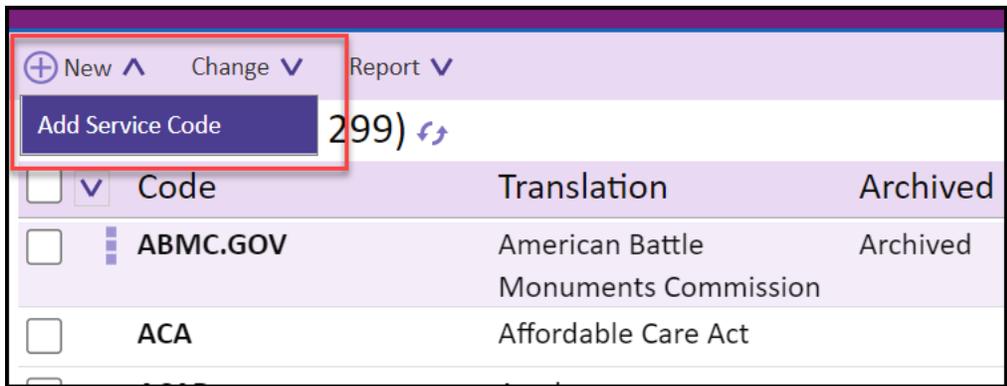
1. Navigate to the **Services** application.



2. Select the **Code List 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.

- 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 **Archive** 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.

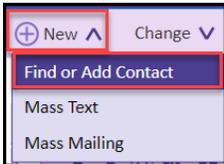
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Use a Service Code to Create an Agency Contact

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. Open the Contacts application and click **+New → Add Contact**.



2. Complete in the information in the “Find or Add a Contact” window. Click the **Add Contact** button when finished.

A screenshot of a window titled 'Find or Add Contact Record'. The window contains a 'Search for Contact' section with the following fields:

- A search prompt: 'Search by Nameline, Email or Phone' with a text input field below it.
- Name fields: 'Prefix', 'First Name', 'Middle Name', and 'Last Name'.
- 'Address' field.
- 'City', 'State', and 'Zip' fields, with a magnifying glass icon to the right of the 'Zip' field.
- 'Email' and 'Phone' fields.
- 'Title' and 'Organization' fields.
- 'Affiliation' field with a plus sign icon to its right.

 At the bottom right of the window, there are two buttons: 'Add Contact' and 'Cancel'.

3. In the **Add Contact Record** window, type the information you know about the agency contact. Be sure to add the Agency Code or Agency Category at the bottom. Then select **Save & Close** or **Save**.

Agency Category	Agency Code
<input type="button" value="Save & Close"/> <input type="button" value="Save"/> <input type="button" value="Close"/>	

Attach Agency Contacts in a Service Record

1. Search for and open the service record.
2. In the service detail window, click  next to the **Add Message** button, then select **Attach Contact**.
3. Select **Agency Contacts only**. IQ will perform a search for Agency contacts based off of the service code(s) on the case.
4. Select the correct agency contact, then click **Attach to Service**.

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