

## Creating a Service Record

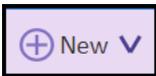
**Market:** House, Senate

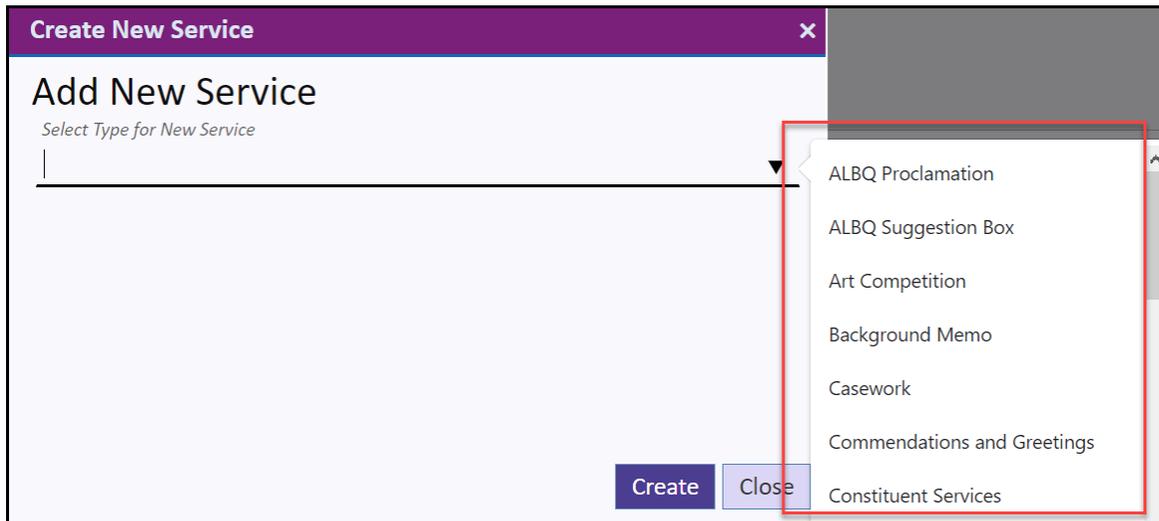
**Description:** In IQ, services (e.g., Casework, Flag/Tour Requests, etc.) have their own templates yet share common processes. This enables customization in data entry and uniformity in process management. These instructions teach users how to create a service record in IQ.

Click the following link to be brought straight to the topic:

[Creating a Service Record from an Existing Contact Record](#)

### Creating a Service Record from a New Contact Record

1. Navigate to **Services** application and click  → **Service**.
2. In the Create New Service window, click into the field labeled “Select Type for New Service.” A drop-down list of available services will display. Select the service type and click **Create** button.



3. Enter data in the various tabs of the Service request. There are multiple tabs within this request. Be sure to include a service code.

4. Click **Save & Close** button.

5. Click on the  icon next to **Primary Contact**.

6. In the **Attach Primary Contact** window, select **Find and Add**. IQ will return search results based on the entered information below the **Attach New Contact to Service** area. If contact does not exist, **Attach to Service**.

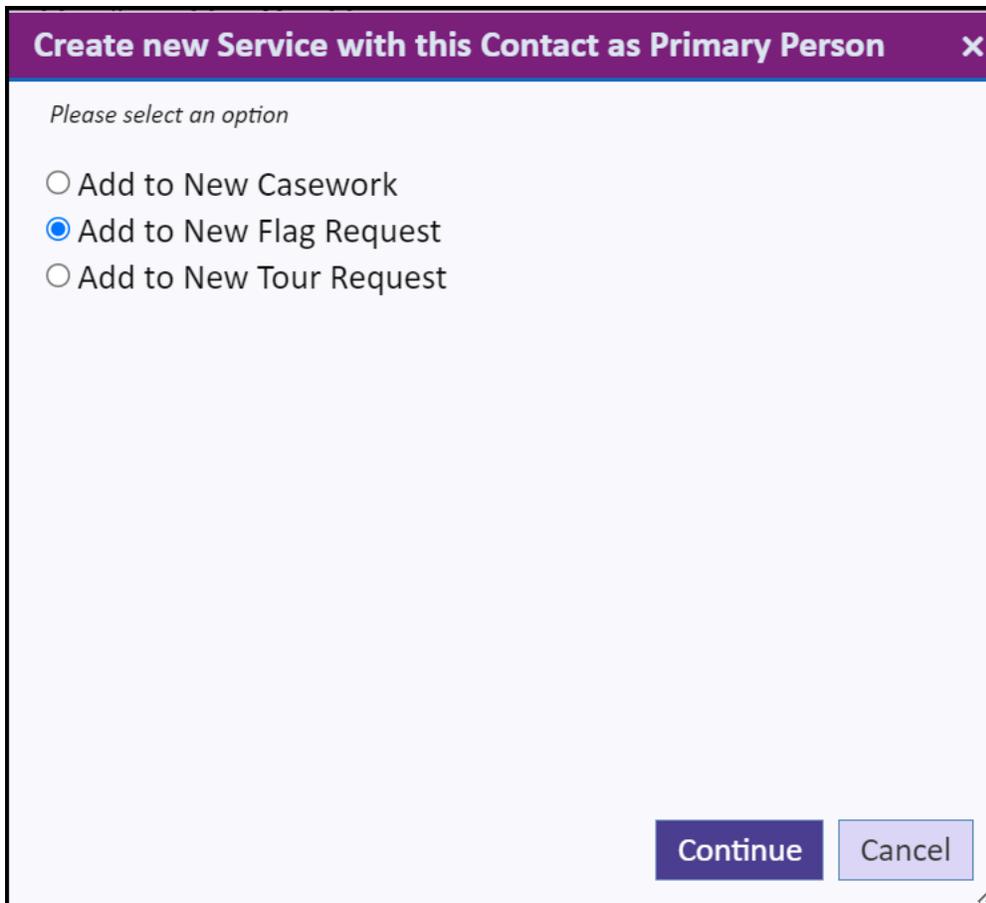
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## Creating a Service Record from an Existing Contact Record

1. Search for and open the contact record.
2. Click the **Add Service** button in the detail of the record.



3. Select the appropriate service and click **Continue** button.



4. 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**.

### Edit Flag Request

**Summary** | ORDERED ITEMS | SHIPPING INFORMATION | TRANSACTION DATA

*Description*

---

*Opened*  
Date 12/21/2022  Time 03:33 PM

*Due*  
Date mm/dd/yyyy  Time --:-- --

*Alert*  
Date mm/dd/yyyy  Time --:-- --

*Step Due*  
Date mm/dd/yyyy  Time --:-- --

*Priority*  
9

*Service Codes*

Activity | Discuss

Add a note...

Step 1 Begun 12/21/2022 - 03:33 PM

ID#801623  
Row 1

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