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
- 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.

🕀 New 🗸

Service.



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.

Page **1** of **4** Leidos proprietary 2024. This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

Edit Flag R	equest		
Summary	ORDERED ITEMS	SHIPPING INFORMATION	TRANSACTION DATA
Description			
Opened			
Date 12/2	21/2022	Time 12:45 PM 🕓	

- 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.

Attach Prin	nary Contact				×	
Find Find Search by Nan Alessandro	and Add Agency (neline, Email or Phone Sagredo	Contacts	Attach as ● Primary Contact			
Prefix	First Name Alessandro	Middle Name	Last Name Sagredo	O Other Contact		
Address				Affiliations	\oplus	
City	State	Zip				
Email		Phone				
Attach New Con	tact to Service					
				Attach to Service	Cancel	

Top of Page



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.

Create new Service with this Contact as Primary Person	×
Please select an option	
 Add to New Casework Add to New Flag Request Add to New Tour Request 	
Continue Car	icel

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 Re	quest								:
<u>Summary</u> Description	ORDERED ITEN	NS SHIPP	ING INFORN	ATION	TRANSACTION DATA				Activity Discuss
Opened Date <u>12/2:</u> Due Date mm/d	1/2022 [dd/yyyy [Time	03:33 PM	0	Step Due Date mm/dd/yyyy	🗖 Time	:	0	Post Step 1 Begun 12/21/2022 - 03:33 PM
Alert Date mm/e	dd/yyyy [] Time	:	0	Priority 9				
Service Code	25						ID#801623 Row 1		Save & Close Save Close

Top of Page