How to Create a Service Record

Market: Federal/State/Local, House, Senate

Module: Services

Purpose: This guide provides instruction on how to create a new service record using IQ service templates. Casework, Tour Requests, and Flag Requests are a few examples of the many types of services that can be processed in IQ. Contact your office IQ Consultant for more information on these services.

Key Benefits

IQ automatically provides the user the appropriate service template based on the type of service selected. By having these customizable templates available in IQ, users can complete and process their services properly and more efficiently.

1. Navigate **Services > New > Service**.

2. The **Select Service Type** window is displayed.   Uncheck **Show Preferred Only** to view all your office's services. Click the link of the service.

   Select Service Type

   ☑ Show Preferred Only

   Scheduling Requests
   Casework
   Flag Request
   Tour Request

   a. For a Meeting service, select **Scheduling Requests**.
   b. For a Casework service, select **Casework**.
   c. For Flag Request Service, select **Flag Request**.
   d. For Tour Request Service, select **Tour Request**.

3. The template tailored for the selected service is displayed on the screen. Complete the fields for the service template. In IQ, the fields that are displayed will vary based on the template. However, the following fields below are common in most templates:

Opened:		Due:		Step Due:		Alert:		Priority:	
2/3/2021	10:18am							9	▾

   a. *Service Code:* This is the code for the agency that may be involved with processing the service.
   b. *Due*: This is the date when the entire process must be completed.

c. *Step Due*: Some services involve several stages or steps. This is the date that the current step of the service must be completed.

d. *Alert*: This is the date a user is alerted to remind them that the step needs to be completed.

e. *Priority*: This is the level that identifies the priority of the service. Each office's priority levels vary. Contact your Office IQ Consultant for details.

4. Click **Save**