

How to Attach a Contact Record to a Service Record

Market: Federal/State/Local, House, Senate

Module: Services

Purpose: This guide provides instruction on how to attach an existing contact record or create a new contact record for a service record.

Key Benefits

By associating contact record(s) with a service record, you can easily create and send correspondence to the individual(s) while processing a service record. Thus, this is a time-saving technique.

IQ also provides flexibility to save different types of contacts to associate with a service record. The *Primary Contact* refers to the person who requested the service. *Other Contacts* refer to agency staff or other individuals who may be involved with the service.

1. Open an active service record.
2. Select the option to add a contact record.

Option 1: Navigate to the **Details** section of the service record and click + **Primary Contact** or + **Other Contacts**.

The screenshot shows a service record details page. At the top, there is a 'Detail' tab highlighted with a red box. Below the tab, the record information is displayed: Status: OPEN; Assigned: Profile Staff Assistant with a 'Release' link; Due: (empty); Opened: 2/3/2021 - 2:47pm by Profile Staff Assistant; Updated: (empty); Step Due: (empty); Priority: 9; Alert: (empty); Codes: FLAG - Constituent Flag Purchase; Description: None. At the bottom of the details section, there are two buttons: 'Primary Contact +' and 'Other Contacts +', both highlighted with a red box.

Option 2: Click **Actions** on the service record page and select **Attach Contacts** or **Attach Contacts by List**. The latter is used when you want to access a list of contacts based on a criteria (i.e. contacts that have a common affiliation code).

The screenshot shows the 'Actions' dropdown menu. The options listed are: Attach New Service, Attach Existing Service, Attach Contact, Attach Contacts by List, and Attach New Event. The 'Attach Contact' and 'Attach Contacts by List' options are highlighted with a red box.

3. A new window appears. Type or search the individual's name in the **Contact** field. If a new contact record does not exist in IQ, click **Add Contact**. To add a contact, refer to the *How to Create a Contact Record in IQ* Quick Reference Guide.



Contact: Quid [Add Contact](#)

Attach More Search Options... Cancel

4. Click **Attach**.