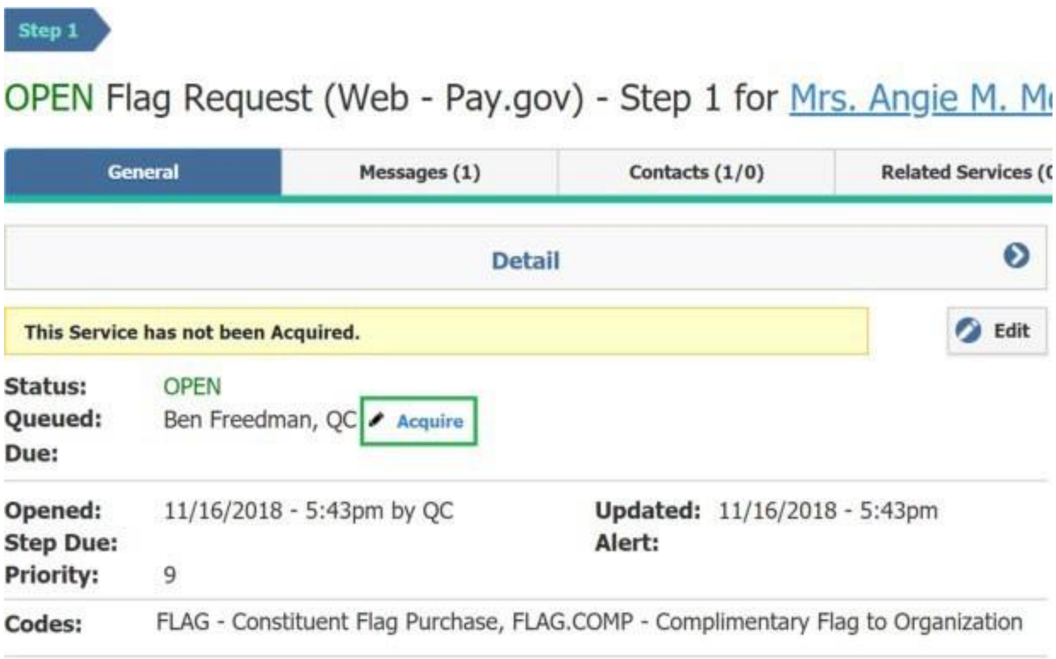
How to Manage Flag Requests in IQ

How to Search and Acquire a New Flag Request from a Web Form:

1. In the **Services** Big Menu, select **All Open by Type** in the **Find Services** column section.
2. Select the **Flag (Pay.Gov Web Form/Flag** Service Template.
3. Scroll down to the *Request Details* section and click on the **Shipping Information** or **Transaction Data** Tabs to view the information of the incoming request.
4. In the *Status* field, click on ***Acquire.***



How to Edit and Add Detailed Information to the Flag Service:

1. In the *Details* section, click the **Edit** button.
2. Enter an Alert Date to be notified about a case. Alert Dates can be searched, filtered and sorted.
3. Select the appropriate Tour Code(s) (e.g. Flag.Comp, Flag.School, Flag.EagleScout) Codes are used for reporting and analytics.
4. Enter any other pertinent information into the Tour Information Tabs.
5. Select the **Save** button at the bottom of the window.

How to Attach a File:

1. Click the **Paperclip** icon in the *Attachments* field.
2. Drag and drop your file into the window or click on the "*Drag and drop files here, or click for the option to browse for file*".
3. Click the File Name search icon to browse for documents to attach to the service. Select all file to be attached, and click the **Open** button. (The selected files will appear in the *Attachments* field on the General Tab).
4. Type any comments about the file(s) in the Note field, click **Attach**. (In the Activity section, the attachment and a note with the detailed information of the attachment - date/time/user information).

How to Attach another Contact:

1. In the *Other Contacts* field, click the **Plus** icon, to add your person to the Service.
2. Type your contacts Name, select the person's Name. Click the **Attach** button. OR
3. If you need to add a new contact, click on *Add Contact* link. Enter in all of the contacts information (e.g. Prefix, Address, Phone Number and/or Email Address) and if adding a new Agency Contact, select the *Business* and *Agency* at the top of the window to associate the appropriate information. Click the **Attach & Exit** button.

How to Add a Note:

In the Activity section, start typing your notes, click the **Post** button to save your update. (Note there is 4,000 character limit and there is counter indicating your progress.

How to Send a Form Letter to the Primary or Other Contacts:

1. From the Detailed page, click the **Envelope** icon next to the *Primary/Other* Contacts.
2. In the Message page, set the fields, such as Out Method, Issues, Assigned To, Out Method, Address, and Salutation, as needed.
3. In the *Form* Letter field, type the "*Form Letter Name*" or search for the desired Form Letter. The salutation and body of the letter will be displayed in the Form Letter area of the Attachments and Response Text section.
4. Enter values for any Fill-In fields that appear for the letter.
5. Click in the Status field and select Approved (if needed).
6. Click the **Send** button if the outgoing method is email or the select the **Print** button/**Print Final** if the method is US Mail. This action changes the status of the Mail record to Completed.
7. Click **Service** breadcrumb at the top of the window to return back to the Case Service record.

How to Send a Customized Response to the Primary or Other Contacts:

1. From the Detailed page, click the **Envelope** icon next to the *Primary/Other* Contacts.
2. In the Message page, set the fields, such as Out Method, Issues, Assigned To, Out Method, Address, and Salutation, as needed.
3. Click the **Customized** button.
4. Enter the desired text in the window, click on the **Save** button.
5. Click in the Status field and select **Approved**.
6. Click the **Send** button if the outgoing method is email or the select the **Print** button/**Print Final** if the method is US Mail. This action changes the status of the Mail record to Completed.
7. Click **Service** breadcrumb at the top of the window to return back to the Case Service record.

How to Complete a Step:

1. On the Casework Service General Tab, click the **Pencil** icon beside ***Open*** *Status* field.
2. Select the **Completed** Step action, click the **Save** button.
3. Select the appropriate Closed Status (e.g.Closed, Closed Favorably, etc.).