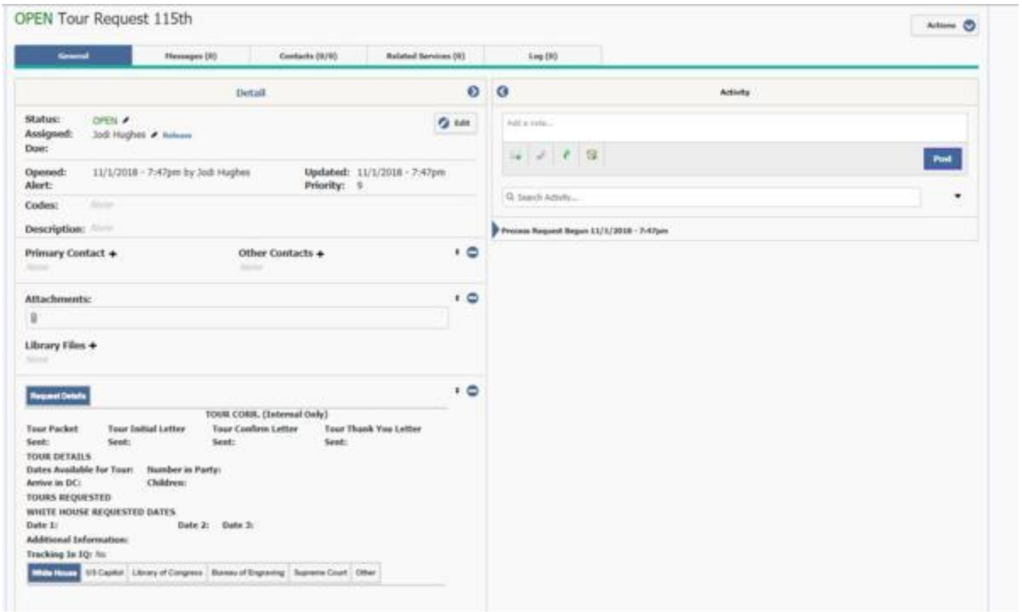
How to Manage Tour Requests

How to Search and Acquire a Tour Request:

1. In the Services Big Menu, select All Open by Type in the Find Services column.
2. Select the Tour Request Service Template.
3. Click the link for the Tour Request.
3. Scroll down to the Request Details section and click on the Tour Information Tabs (White House, Capitol, Bureau of Engraving, etc.) 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 Tour 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. White House, Capitol. BEP, etc.) Codes are used for reporting and Tour liaison associations.
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” to open the Window’s file selection dialog. Select all files to be attached, and click the Open button. (The selected files will appear in the Attach File dialog with a delete icon next to each).
3. Type any comments about the file(s) in the Note field and click Attach. (In the Activity section, IQ displays the attach file names, notes and detailed information about the attachment - date/time/user information).

How to Attach another Contact:

1. Click the + icon next to Other Contacts in the Detail section.
2. Type the First and Last Name (IQ displays a drop-down list of possible matches). If the person exists, then select the person and click the Attach button.
OR
If you need to add a new contact, click the Add Contact link. (IQ displays the Attach New Other Contact for Service dialog). Enter in all of the contact’s information (e.g. Prefix, Address, Phone Number and/or Email Address) and if adding a new Agency Contact, select the Business and Agency checkboxes at the top of the window to enter the appropriate information. Click the Attach & Exit button.

How to Add a Step Note:

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

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

1. Click the Envelope icon next to the person’s name in the Primary or Other Contacts column.
2. In the Message record, populate the fields, such as Outgoing Method, Issues, Assigned To, 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 contents of the selected form letter will be displayed below the Attachments field).
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 Print button/Print Final if the method is US Mail. (Note: This action changes the status of the Message record to Completed).
7. Click the Service breadcrumb at the top of the Message record to return back to the Case Service record.

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

1. Click the Envelope icon next to the person's name in the Primary or Other Contacts column.
2. In the Message record, populate the fields, such as Outgoing Method, Issues, Assigned To, and Salutation, as needed.
3. Click the Customized button.
4. Type the contents of the customized letter in the Content editor and click 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 Print button and Print Final if the method is US Mail. (Note: This action changes the status of the Message record to Completed).
7. Click the Service breadcrumb at the top of the Message record to return back to the Case Service record.

How to Complete a Step:

1. On the Casework Service General Tab, click the Pencil icon next to Status: Open in the Detail section.
2. In the Route Service dialog, the Available Routes will default to Completed, if this is the last or only step in the Case Service record.
3. Type an optional note in the Closing Note field.
4. Select the appropriate Closed Status Code (e.g. Closed, Closed Favorably, etc.).
5. Click the Close Service button.