

## How to Process Schedule Requests in IQ

**Market:** Federal/State/Local, House, Senate

**Module:** Events

**Purpose:** This guide provides instruction on how to process a Member's schedule requests in IQ.

### Key Benefits

A customized *Meeting Request Web Form* can be added to a Member's website\*. The information captured from this form is passed to IQ's *Scheduling Request Template*, which then becomes a record in IQ. This record can be synchronized with Microsoft Outlook calendar. As a result, a staff can maximize IQ as a scheduling tool while incorporating all the analytical data stored in IQ.

\* Contact your office IQ Consultant to configure these IQ events template for your office.

### Creating an Event using information from a Member's Meeting Request Form

This is an example that describes how information entered into a Member's *Meeting Request Web Form* is used to populate and create a meeting/scheduling record in IQ.

1. This is a sample *Meeting Request Web Form* found in a Member's website.

**MEETING REQUESTS**  
Home / Services / Meeting Requests

**Request a Meeting**  
Note: Fields marked with an \* are required.

Prefix \*      First Name \*  
     

Middle      Last Name \*      Suffix  
           

Organization \*      Title \*  
     

Website

Street Address \*

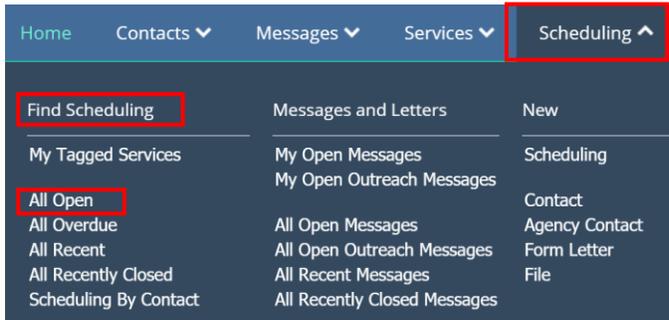
Street Address Continued

City \*      State \*      Zip Code \*  
           

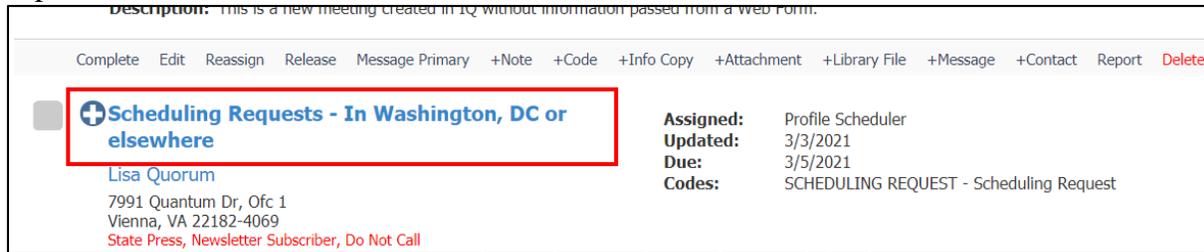
Email \*      Phone Number \*  
     

Type of Appearance \*      Event Date \*

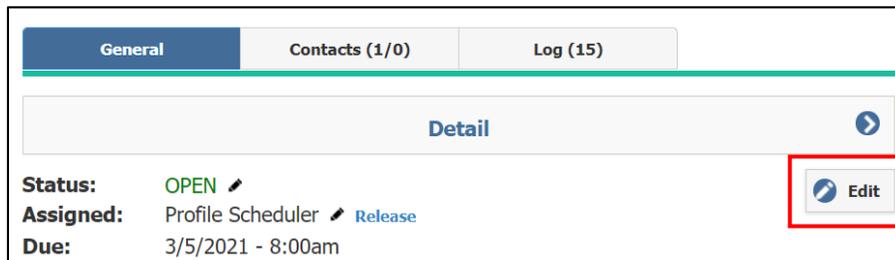
- After the constituent completes and submits the information of the *Meeting Request Web Form*, IQ will automatically capture this information and use this information to populate and generate a scheduling service record in IQ. To access these requests, navigate to the **Scheduling > Find Scheduling > All Open**.



- The page will display all opened scheduling request records. Click the title of the record to view and expand the information.



- On the **General** tab of the record, click **Edit**.



- The *IQ Scheduling Request Template* is displayed. Complete the fields below.

**Description:**

**Opened:**   **Due:**

**Service Codes:**

× SCHEDULING REQUEST - Scheduling Request

6. Under the **Event Data** section, complete the information. Note the following IQ specific fields:

Event Data		
<b>Type of Request</b>	<b>Calendar</b>	<b>Response Status</b>
Meeting Request	Joe Quorum	TBD
<b>Location</b>	<b>Review Status</b>	<b>Member Requested</b>
In Washington, DC or elsewh...	PENDING REVIEW	Yes
<b>Event Date</b>	<b>Link to Event</b>	<b>Speaking Role</b>
3/5/2021		TBD

- **Green:** these fields will be prepopulated with information that was entered on the Member's *Meeting Request Web Form*.
- **Red:** these fields may be prepopulated from the Member's *Meeting Request Web Form* or may need to be manually completed by the office staff.

7. Click **Save**.

<b>Save</b>	<b>Save and Route</b>	<b>Save without Closing</b>	<b>Cancel</b>
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8. Select **Actions** > **Create Calendar Event**.

The screenshot shows a service request page for 'OPEN Scheduling Requests - In Washington, DC or elsewhere for Lisa Quorum'. The page has tabs for 'General', 'Contacts (1/0)', and 'Log (34)'. The 'Detail' tab is active, showing the status as 'OPEN', assigned to 'Profile Scheduler', and due on '3/5/2021 - 8:00am'. An 'Actions' dropdown menu is open on the right, with 'Create Calendar Event' highlighted in a red box. Other options in the menu include 'Merge Services', 'Print Summary', 'Attach Contact', 'Attach Contacts by List', 'Attach Message', and 'Delete'. A 'Post' button is visible at the bottom right of the page.

9. A confirmation message is displayed. Click **Create**.

The screenshot shows a 'Create Calendar Event' confirmation dialog box. The text inside reads: 'You are about to create a new Event for the Requests Calendar:'. Below this, it shows 'Date: 3/5/2021' and 'Summary: CNN Interview'. At the bottom, it says 'Click 'Create' to create the new Event or 'Cancel' to abort.' There are two buttons at the bottom: 'Create' and 'Cancel'. The 'Create' button is highlighted with a red box.

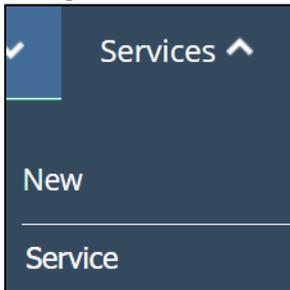
10. Navigate to **Events** > **Views** > **Monthly**. The event is now included in your calendar in IQ.

The screenshot shows a 'Monthly Calendar for Requests' for March 2021. The calendar is in 'Month' view. The event 'CNN Interview' is scheduled for Friday, March 5th, and is highlighted with a red box. The calendar shows days from Sunday to Saturday, with dates 28 through 13. The event is represented by a blue bar on the date 5.

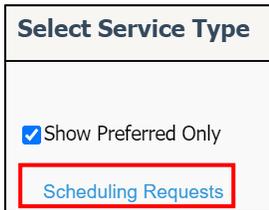
### Creating an Event within IQ

This is an example creating a meeting/scheduling record in IQ, which caters to offices that do not have the Meeting Request Web Form on their Member website.

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



2. A list of service templates\* is displayed. Select **Scheduling Requests**.



\*Contact your office IQ Consultant on how to configure the display settings of your service templates.

3. Refer to **step 5** through **step 10** of the **Creating an Event using information from a Member's Meeting Request Form** guide.