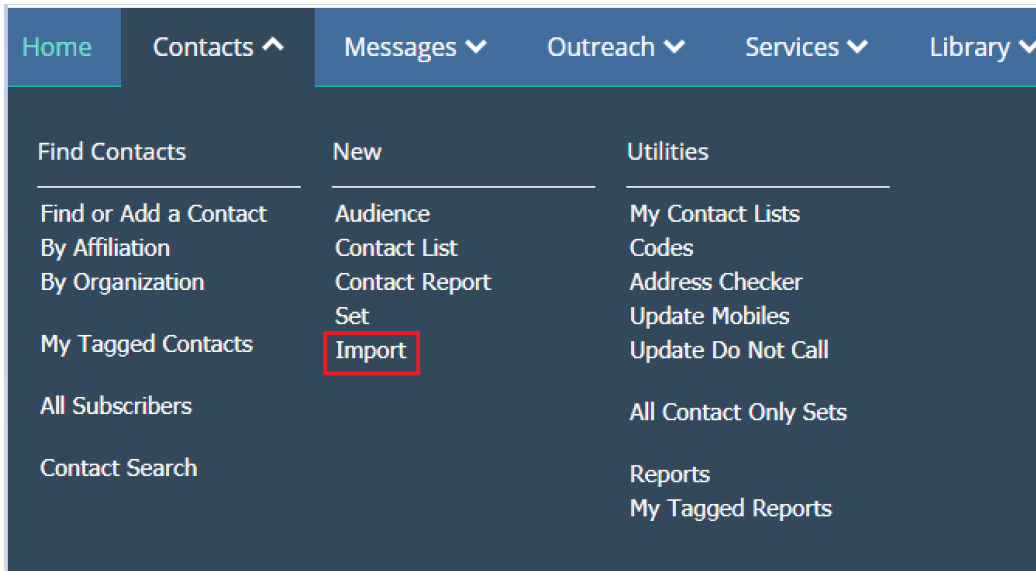


Importing Contacts in IQ

1. First, clean up the excel sheet so there are clearly defined fields for each Column. (Column A – First Name, Column B– Last Name, etc.)
2. Once data is confirmed to be consistent, save the file as a Text(Tab delimited) file format.
3. In IQ, go to Contacts -> Import to begin the process



4. The first screen allows you to name the set all contacts will be going into, and choosing what form of data you are inputting. If importing from a Microsoft Excel document, choose "Import"

Add New Set Definition





Set Name:

Set Type:

- Digital Mail
- E-Mail
- Import
- L2 Voter Data
- E-Mail Update

5. The next screen will allow you to choose what will be created for each contact.
 - a. Set Name and Source are grayed out since they were input on the previous screen
 - b. Create – this dropdown determines if you create just a contact, a contact with a message, or contacts in an outreach audience
 - c. Status – This determines the status of the message, open or closed
 - d. Description – This will be the description in the contact
 - e. All sections below Description pertain to the message that will be created, allowing service codes, issue codes, and other information to be added to the message.

Edit SNAP POSTCARD SIGNERS Definition

Set Name	<input type="text" value="SNAP POSTCARD SIGNERS"/>
Source	<input type="text" value="Import"/>
Create	<input type="text" value="Contacts and Messages"/>
Status	<input type="text" value="Open"/>
Description↓	<input type="text" value="Snap Postcard Signers"/>
Affiliations	<input type="text" value="Select affiliation Codes ..."/>  +
Service Codes	<input type="text" value="Select Workflow Codes ..."/>  +
Service Categories	<input type="text" value="Select Workflow Category Codes ..."/>  +
Incoming Method	<input type="text" value="Walk into DC office"/>
Issues	<input type="text" value="Select Issue Codes ..."/>  +
Assigned To	<input type="text"/>
Comments	<input type="text"/>
Out Method	<input type="text" value="E-Mail"/>
Letter Date	<input type="text" value="03/12/2018"/>
Letter	<input type="text" value="Select a letter ..."/>

- At the "Import File" screen, choose the Text (Tab Delimited) file you created before. Then, change the File Type to Tab Delimited.

- a. The checkbox to the right of “File Type” will determine whether or not Duplicate Checker will run. This will increase the time it takes to finish the import, but will keep the database free of unnecessary new contacts.
- b. Be sure to review your Excel file to see if you had headers or not, to ensure you do not make a contact out of the headers.
- c. After all selections, click “First Record” to update and review the fields that need to be imported.

Import File

Import File Choose File Hetkamp Imp...Signers.txt

File Type Tab Delimited Duplicate Check

First Line Ignore (header) Import (data)

First Record

7. Use the dropdowns under “Map to IQ Field” in order to choose what details you would like added to the contact record. It is recommended you review at least three records to ensure the Excel document was uploaded successfully.
 - a. It is recommended to import records in the background, especially if they will have messages attached to them.

Import File

Import Now

Background Import

Cancel

Import File Choose File Hetkamp Imp...Signers.txt

File Type Tab Delimited Duplicate Check

First Line Ignore (header) Import (data)

First Record Next Record

Field #	Source Data (Row 1)	Map to IQ Field
1	Michelle	First Name ▼
2	Fundingsland	Last Name ▼
3	minotmittens@hotmail.com	email ▼
4	1 Fair Way	Primary Address Line 1 ▼
5	Minot	Primary City ▼
6	ND	Primary State ▼
7	58701	Primary ZIP Code ▼

8. In the background job creation tool, ensure the background job will start sometime in the future (at least 2 minutes in the future), and add the email addresses you would like notified when the job is completed.

Import File

Date and Time to Run Background Job at

Email Report to These Addresses