
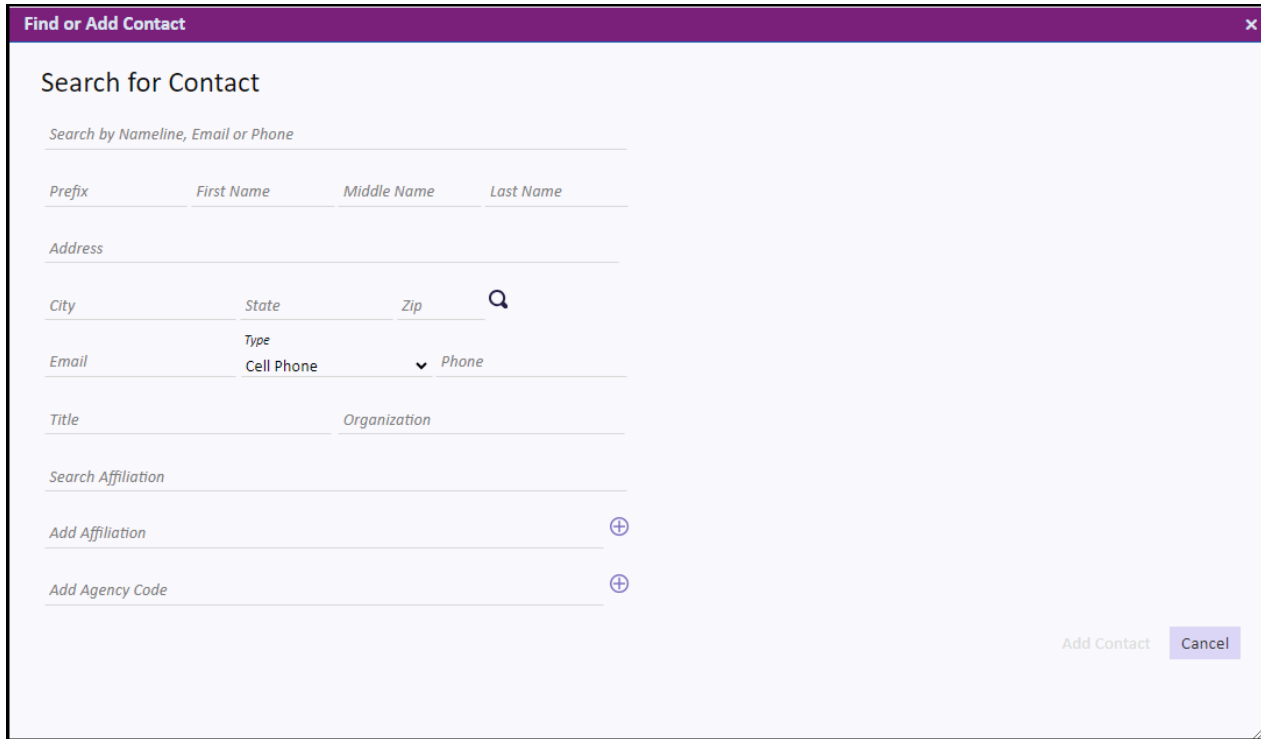


## Creating/Searching For a Contact Record

**Market:** House, Senate

**Description:** These instructions teach users how to create a contact record in IQ5.

1. Click on the  icon to Search for/Create a new Contact Record.



2. In the first line, search by **First/Last Name, Email or Phone Number**. If the Contact exists, the matching record will appear on the right-hand side as shown below:

Find or Add Contact
✕

### Search for Contact

Search by Name/line, Email or Phone

Johnny Bravo

	First Name	Middle Name	Last Name
Prefix	Johnny		Bravo

Bravo, Dr. John M.  
Incomplete Address  
Elected official

ID: 7183547  
Messages Open: 0 Closed: 0  
Services Open: 0 Closed: 0

Bravo, Mr. Johnny C.  
12134 Monument Dr., Fairfax, VA 22033-5531  
johnnyb@fakemail.com, (098) 765-4321 (H), (410) 000-0000 (C), 202-333-6556 (B)  
Frequent Writer - High Volume

ID: 7118241  
Messages Open: 53 Closed: 248  
Services Open: 21 Closed: 128

Address

---

City  State  Zip  🔍

Email  Type  Phone

Title  Organization

Search Affiliation

---

Add Affiliation +


---

Add Agency Code +

---

Add Contact
Cancel

3. If no match appears, type in additional information such as the constituents **address, city, state, email, phone number, etc.** Each additional field will add to the search on your database, ensuring the contact does not exist and no duplicate will be created.

a. **\*Note:** When adding in the address information, click on the  icon to verify the constituents address and see their District. Address Verification will still occur if you do not click this button and instead click on "Create New Contact".

4. Click **Add Contact**.

**Find or Add Contact** ✕

### Search for Contact

Search by Nameline, Email or Phone

---

Prefix	First Name	Middle Name	Last Name
Address			
12134 Monument Dr			
City	State	Zip	🔍
Fairfax	VA - Virginia		
Email	Type	Phone	
mjones@fakemail.com	Cell Phone	▼	
Title	Organization		
Search Affiliation			
Add Affiliation			⊕
Add Agency Code			⊕

Add Contact
Cancel

- The Contact detail window will open with the values entered previously. Click “Edit” to add in additional contact information including prefixes, salutation information, communication information (emails, phone numbers, etc.) and address information.

mjones@fakemail.com

General Discuss Logs

**Email Addresses** ⊕

✉ mjones@fakemail.com ★

**Phone Numbers** ⊕

Home ⊕ ★  
12134 Monument Drive  
Fairfax

**Social Networks** ⊕

Business ⊕

	All	Open	Closed	Recent
Messages	0	0	0	0
Outreach	0	0	0	0
Services	0	0	0	0
Events	0	0	0	0

**Attachments** 📎

Head of a 1 Member Household 📎 ⊕

**Affiliations** 📎

Edit
Add Message
Add Service
Add Event
⋮

Edit Contact
✕

### Mr. Martin Jones

Name
Communications
Addresses
More

Prefix	First	Middle	Last	Suffix	Appellation
Mr.	Martin		Jones		

Formal Salutation	Informal Salutation	Household Salutation	Household Name
Mr. Jones	Martin	Mr. Jones and Family	Friends

*Couple Name*

*Couple Formal Salutation*

*Couple Informal Salutation*

*Birthdate*

mm/dd/yyyy

*Comments*

---

**Attachments**

*Affiliations*

*Agency Code*

*Agency Category*

ID#7183927

Row 1

Save & Close   Save   Close

Edit Contact
✕

### Mr. Martin Jones

Name
Communications
Addresses
More

Add Communication


Type	Cell Phone	Cell Phone	Description	Primary	Do Not Call	Do Not Text	Text Optin
	Cell Phone	3334445555		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Type	Email	Email	Description	Primary
	Email	mjones@fakemail.com		<input checked="" type="checkbox"/>


ID#7183927

Row 1

Save & Close   Save   Close

**NOTE:** In the **Addresses** tab, be sure to add the **Street Name → Zip Code in the City field → Click the  icon** to have IQ5 automatically fill in and verify the address information. Also, **Affiliation** codes on the **Name** tab are IQ customized codes for groups, demographics or organizations with which the contact is associated and can be used by your Communication team for better Outreach. Make sure to add them at the bottom of the **Name** tab!

**Edit Contact** ✕



**Mr. Martin Jones**

Name Communications Addresses More

Preferred Primary Type  Home  Business Add Address +

Select Address H: 12134 Monument Drive, Fairfax\* ▼

Address Type  Home  Business  Residential  Primary **Preferred Primary**

Address Line 1  
12134 Monument Dr

Address Line 2

City	State	Zip	+4
Fairfax	VA - Virginia	22033	5531

Country County Precinct Cong. District State House State Senate

United States	Fairfax		VA11		
---------------	---------	--	------	--	--

⏪ ⏩

ID#7183927  
Row 1

Save & Close Save Close