
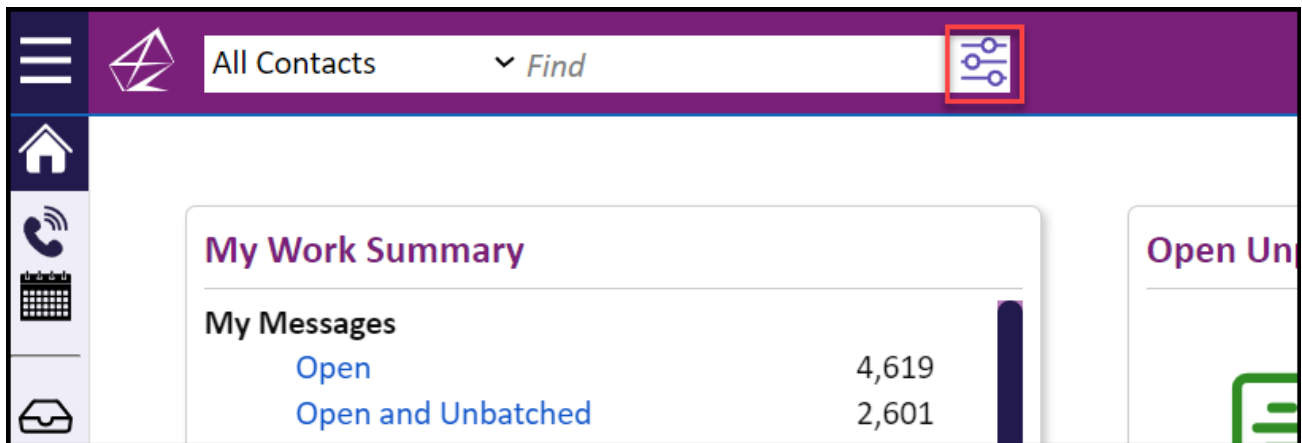


## Using the IQ Audience Builder

**Market:** House, Senate

**Description:** These instructions teach users how to use the IQ Audience Builder to generate a list of contact records.

1. In the Contacts search bar, select the  button.



2. The Contact Characteristics window is displayed. Select the **Advanced** button.

All Contacts Find

**Contact Characteristics**

Last Name \_\_\_\_\_

First Name \_\_\_\_\_

Contact ID(s) \_\_\_\_\_

Email or Phone \_\_\_\_\_

Affiliations \_\_\_\_\_


Issues \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

County \_\_\_\_\_

**Search** **Advanced**

3. The **Audience Builder** feature is displayed. Select the appropriate attributes to create the baseline of this audience. You may click the  to expand any of the categories.

User Imports Search

**Contacts Search**  
New Search

Start Search With: All Contacts

Search Title: Contacts Search [at 10/22/2024 11:38:29 AM]

**Audience Characteristics**

Affiliations	Include	Exclude
Issues	Include	Exclude
City	Include	Exclude
State	Include	Exclude
County	Include	Exclude
ZIP Code	Include	Exclude
Age	Include	Exclude

Apply To:  All  Only Household Head  Not Household Head

More - Geography **Search** Search and Add to Menu Count Only

4. Enter the attributes to **Include** at the left column and **Exclude** at the right column.

The screenshot shows the 'Contacts Search' interface. Under 'Audience Characteristics', there are two columns: 'Include' and 'Exclude'. The 'Include' column has one entry: 'EMAILOPTIN - Newsletter Subscriber'. The 'Exclude' column has three entries: 'DECEASED - Deceased', 'EMAILOPTOUT - UN-Subscribed to Newsletter', and 'MDCALL - Member of Congress'. Below the columns are radio buttons for 'Apply To' (All, Only Household Head, Not Household Head) and buttons for 'Search', 'Search and Add to Menu', and 'Count Only'.

The 'More - Geography' section contains three rows. The first row is 'Apply To' with radio buttons for 'All Addresses' (selected), 'Primary Addresses', and 'Preferred Only'. The second row is 'Address Type' with radio buttons for 'Either' (selected), 'Home Only', and 'Business Only'. The third row is 'Congressional District' with the text 'VA11'.

**Note:** A Best Practice under **Audience Characteristics** is to exclude contacts who are Members of Congress, deceased, or prefer not to be contacted. Under **Geography**, enter the congressional district in the **Include** column to avoid sending outreach to contacts outside of the appropriate district.

5. Expand the **Search Options** category.

The 'Search Options' section contains four rows. The first row is 'Combine Entries With' with radio buttons for 'And' (selected) and 'Or'. The second row is 'Case Sensitive' with radio buttons for 'Yes' and 'No' (selected). The third row is 'Wildcard Character' with the text '\*'. The fourth row is 'Delimiter Character' with the text ','.

a. **Combine Entries With:**

- **And:** This option will use **all** search criteria defined in previous sections.
- **Or:** This option will use **any** search criteria defined in previous sections.

b. **Wildcard Character:**

- Defaults to an asterisk (\*)
- Used to perform a partial match.

6. Click **Count Only** to determine the number of contact records based on the criteria.

7. Click one of the following options:

- Search:** Allows you to view the list of contact records based on the criteria.
- Search and Add to Menu:** Allows you to search and view the list of contact records, as well as add this search to your Contacts menu so you can search it again in the future.
- Count Only:** Allows you to just see a count of how many contacts this search would find.

