


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

Address

City State Zip Q

Email Type Cell Phone Phone

Title Organization

Search Affiliation

Add Affiliation +

Add Agency Code +

Add Contact
Cancel

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

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 Q 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 Name, 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

Affiliations

Head of a 1 Member Household

Edit
Add Message
Add Service
Add Event
⋮

Edit Contact
✕

Mr. Martin Jones

Name
Communications
Addresses
More

<i>Prefix</i>	<i>First</i>	<i>Middle</i>	<i>Last</i>	<i>Suffix</i>	<i>Appellation</i>
Mr.	Martin		Jones		
<i>Formal Salutation</i>	<i>Informal Salutation</i>	<i>Household Salutation</i>	<i>Household Name</i>		
Mr. Jones	Martin	Mr. Jones and Family	Friends		
<i>Couple Name</i>		<i>Couple Formal Salutation</i>		<i>Couple Informal Salutation</i>	
<i>Birthdate</i>	<i>Comments</i>				
mm/dd/yyyy					
<i>Attachments</i> +					
<i>Affiliations</i> +					
<i>Agency Code</i>			<i>Agency Category</i>		

⏪ ⏩
ID#7183927
Row 1
Save & Close Save **Close**

Edit Contact
✕


Mr. Martin Jones

Name
Communications
Addresses
More


Add Communication +

<i>Type</i>	<i>Cell Phone</i>	<i>Description</i>	<i>Primary</i>
Cell Phone	3334445555		<input checked="" type="checkbox"/> Primary <input type="checkbox"/> Do Not Call <input type="checkbox"/> Do Not Text <input type="checkbox"/> Text Optin
<i>Type</i>	<i>Email</i>	<i>Description</i>	<i>Primary</i>
Email	mjones@fakemail.com		<input checked="" type="checkbox"/> Primary

⏪ ⏩
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