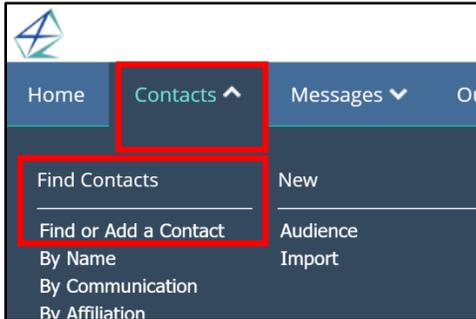


## Creating a Contact Record

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

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

1. Navigate to **Contacts > Find Contacts > Find or Add a Contact.**



2. In the Find Contact pane, enter contact information and click **Find Existing Contacts** to determine if the contact record exists in IQ.

**Note:** A Best Practice is to search for an individual's contact record prior to adding it to IQ. This prevents storing duplicate records for an individual.

A screenshot of a 'Find Contact' form. The form has a title 'Find Contact' and several input fields: 'Name (Mr. Joe T. Quorum Jr.)', 'Email', 'Phone Number', 'Title', 'Organization', and 'Organization2'. The form is styled with a light blue header and white input fields.

3. A set of results is displayed on the right page. If the individual's information is not found, click **Add Contact**.



4. The **Add Contact** window appears. Complete the fields as needed.

**Add Contact**

Business
  Foreign
  Affiliation
  Salutation

Prefix: Dr. | First Name: Isabella | Middle: J. | Last: Quorum | Suffix: Sr. | Appellation:

Formal Salutation: Dr. Quorum | Informal Salutation: Isabella

Household Salutation (Family): Dr. Quorum and Family | Household Name: The Quorum Family

Couple Name: | Couple Formal Salutation: | Couple Informal Salutation:

Street Address: \_\_\_\_\_

City (or Zip): \_\_\_\_\_ | State: \_\_\_\_\_ | Zip: \_\_\_\_\_

Email: \_\_\_\_\_ | Phone: \_\_\_\_\_

Affiliation:
 

- TEACHER - Teachers
- VET - Veteran

**NOTE:** **Affiliation** codes are IQ customized codes for groups or organizations with which the contact is associated. The **Salutation** fields will automatically populate using the information entered in the **Prefix** field. The **Couple field** salutations, however, will not be populated automatically.

5. Click **Add & Exit**.