

## Importing Contact Records into IQ

Market: Federal/State/Local, House, Senate

**Description:** These instructions teach users how to import contact records into IQ. It is recommended to contact your IQ Consultant when conducting this activity.

- 1. In the Excel sheet that contains the information to import into IQ, confirm that the column titles are well-defined (i.e., **First Name**, **Last Name**, etc.)
- 2. Once the Excel sheet data has been reviewed, save the Excel file using the format below. Text (Tab delimited) (\*.txt)
- 3. In IQ, navigate to Contacts > New > Import.

Home	Contacts 🔨	Messages 🗸	Outreach 🗸	Services 🗸	
Find Cor	ntacts	New	Utilities		
Find or Add a Contact By Name By Communication By Affiliation		Audience Import	My Conta Codes Address Update 1	My Contact Lists Codes Address Checker Update Mobiles	

4. In IQ, a **Set** refers to a set of records that are imported into IQ. Enter the name of your set and select **Import**.

Add New Set Definition				
Set Name:				
Set Type:	<ul> <li>Digital Mail</li> <li>E-Mail</li> <li>Import</li> <li>L2 Voter Data</li> <li>E-Mail Update</li> <li>Physical Mail</li> </ul>			
	Configure Set Cancel			

	Edit TRAINING SET Definition	
Set Name	TRAINING SET	
Source	Import	
Create	Only Contacts	
Status	Open 🔹	
Description	Created on 2/15/2021 4:07:33 PM by Jonathan Kilgore	
Affiliations	Select affiliation Codes	
Service Codes	Select Workflow Codes	
Service Categories	Select Workflow Category Codes	
	Save and Select Import File Save Cancel	

5. Complete the fields. Click Save and Select Import File.

- a. Set Name and Source are grayed out since they were completed at the previous screen.
- b. **Create**: this dropdown determines if you create only a contact, a contact with a message, or multiple contacts within an IQ Outreach (i.e. newsletter, survey) audience.
- c. Status: This determines the status of the message (i.e. open or closed).
- d. **Description**: This will be the description in the contact record.
- e. All sections below **Description** pertain to the contacts that will be created. For example, affiliation codes and/or service codes can be added to the contacts upon import to make it easier to find them later.
- 6. The Import File window appears on the screen.

Import File				
Cancel	Import File       Choose File       Hetkamp ImpSigners.txt         File Type       Tab Delimited <ul> <li>Ø Duplicate Check</li> <li>First Line</li> <li>Ø Ignore (header)</li> <li>Ø Import (data)</li> <li>First Record</li> </ul>			

- a. Import File: choose the file you saved in Step 2.
- b. File Type: select Tab Delimited or CSV depending on how you have saved your excel sheet.

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- c. **Duplicate**: This checkbox provides you the option of enabling IQ's Duplicate Checker to run. It is a best practice to keep this selected, as this will prevent IQ from importing duplicate contact records.
- d. **First Line (Ignore Headers):** Select this option if your data has column titles on the first row so that this row will not imported as a contact record.
- e. Click **First Record** to update and review the fields that need to be imported.
- 7. Under the Map to IQ Field, use the dropdowns to choose the details added to the contact record. It is best practice to review at least three records to ensure the Excel file is uploaded successfully. Click Import Now to import your contacts. Use Background Import if you have a very large file or you are importing contact records with additional information such as attached messages.

	Import File				
Import Now Background Import	Import File Cho File Type Tab First Line ® Ig			ose File Hetkamp ImpSigners.txt Delimited V Duplicate Check nore (header) Import (data)	
Cancel	First Record Next Record				
	Field #	# Source Data (Row 1)		Map to IQ Field	
	1	Michelle		First Name	•
	2	Fundingsland		Last Name	•
	3	minotmittens@hotmai	l.com	email	•
4 1 Fair Way			Primary Address Line 1	•	
	5	Minot		Primary City	•
	6	ND		Primary State	•
	7	58701		Primary ZIP Code	•

**8.** A new set of information is displayed.

Import File
Date and Time to Run Background Job 3/12/2018 at 2:41 PM Email Report to These Addresses
Submit Background Job Cancel

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**9.** When the import is complete, review the list of contacts. IQ will "match" contacts with existing records and create "new" records if needed.



- **10.** Click "Search again" above a contact to confirm a contact is new and/or has been matched with the correct existing record.
- **11.** When ready, select all the contact in the list  $\rightarrow$  change  $\rightarrow$  status  $\rightarrow$  posted. Click Save. This will complete the import and bring the contacts into your database.



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Change Set Detail Data/Status			
Status	Posted	•	
Sav	cancel		

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