
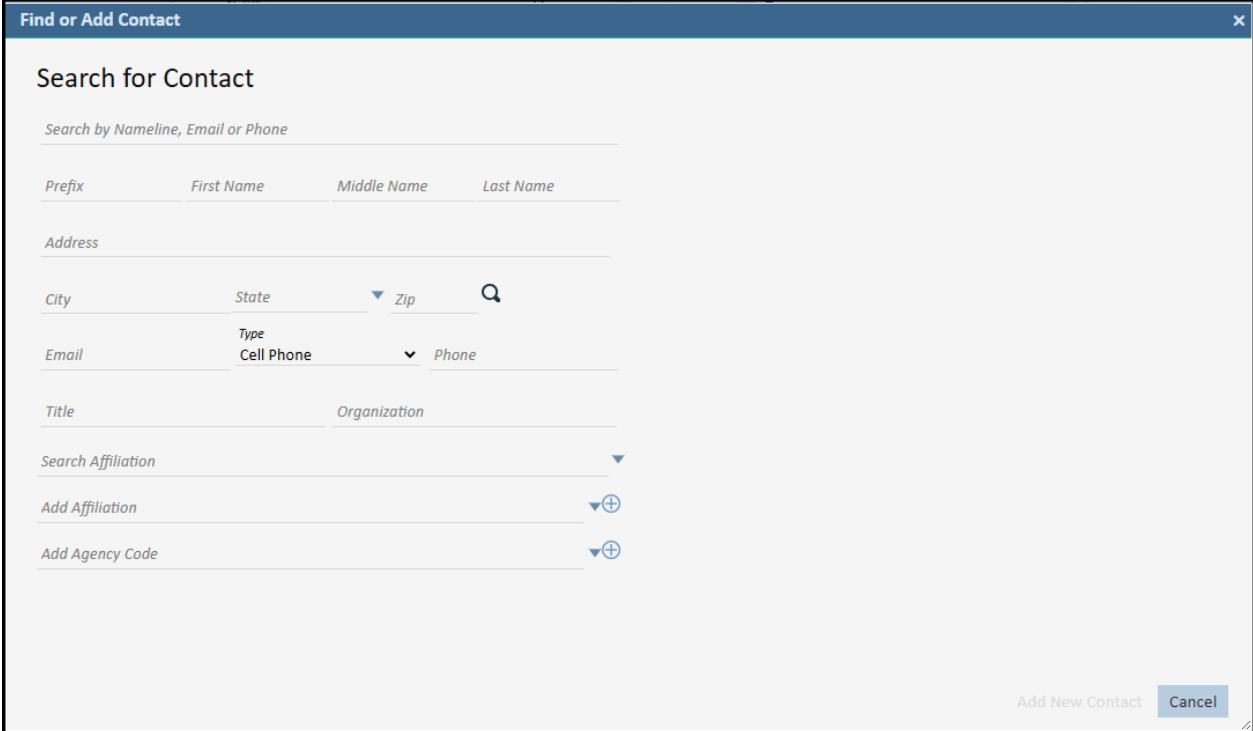


Creating/Searching For a Contact Record

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, Email or Phone

johnny bravo

Prefix

First Name

Middle Name

Last Name

Johnny

Bravo

Address

City

State

Zip

Email

Type

Cell Phone

Phone

Title

Organization

Search Affiliation

Add Affiliation

Add Agency Code

Bravo, Dr. John M.

Incomplete Address

Elected official; Veteran - Thank them for their service

ID: [7183547](#)

Messages Open: 0 Closed: 0

Services Open: 0 Closed: 0

Bravo, Mr. Johnny C.

12134 Monument Dr , Fairfax, VA 22033-5531

johnny@nickelodeon@fakeemail.com, (098) 765-4321 (H), (410) 000-0000 (C), 202-333-6556 (B)

Frequent Writer - High Volume; Veteran - Thank them for their service


ID: [7118241](#)

Messages Open: [63](#) Closed: [264](#)

Services Open: [22](#) Closed: [143](#)

Add New 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 Name, Email or Phone

Prefix

First Name

Middle Name

Last Name

Aubrey

Quorum

Address

12134 Monument Dr

City

State

Zip

Q

VA11

Fairfax

VA - Virginia

22033

Email

Type

Phone

aubreyq@fakemail.com

Cell Phone

0987654321

Title

Organization

Search Affiliation

Add Affiliation

Add Agency Code

Add Contact (VA11)

Cancel

5. 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.), Affiliation/Agency Codes, and address information.
 - a. ***Note: 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!

All Contacts

Find

Row 1 - ID 7184650

Aubrey Quorum

aubreyq@fakemail.com

General

Discuss

Logs

Email Addresses

Phone Numbers

Social Networks

Home

aubreyq@fakemail.com

C: (098) 765-4321

12134 Monument Dr

Fairfax, Virginia 22033-5531

VA11 Fairfax

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

Edit

Add Message


Log Call

Add Service

Add Event

Edit Contact

Aubrey Quorum



Name

Comms

Addresses

More

Prefix

First

Aubrey

Middle

Last

Quorum

Suffix

Appellation

Formal Salutation

Informal Salutation

Household Salutation

Household Name

Quorum and Family

The Quorum Family

Couple Name

Couple Formal Salutation

Couple Informal Salutation

Birth day

mm/dd/yyyy

Comments

ID#7184650

Row 1


Save & Close

Save

Close

Edit Contact

Aubrey Quorum



Name

Comms

Addresses

More

Add Communication

Type

Email

Email

aubreyq@fakemail.com

Description

☒ Primary

Type

Cell Phone

Cell Phone

no876543211


ID#7184650

Row 1

Save & Close


Save

Close

NOTE: In the **Addresses** tab, be sure to add the **Street Name & Zip Code** → Click the  icon to have IQ5 automatically fill in and verify the address information. Also, click on **Business** next to **Address Type** if you want to record where a person works and what their title is there, along with the address of their place of work.

Edit Contact

Aubrey Quorum



Name

Comms

Addresses

More

Contact Preferred Primary Type

☒ Home
 ☐ Business

Add Address

H: 12134 Monument Dr,Fairfax, Virginia 22033*

Preferred Primary Address

Address Type

☒ Home
 ☐ Business

☐ Residential
 ☒ Primary

Address Line 1

12134 Monument Dr

Address Line 2

ID#7184650

Row 1

Save & Close

Save

Close