
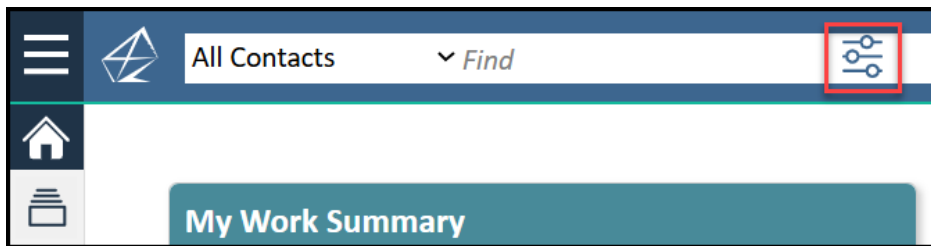


Using the IQ Audience Builder

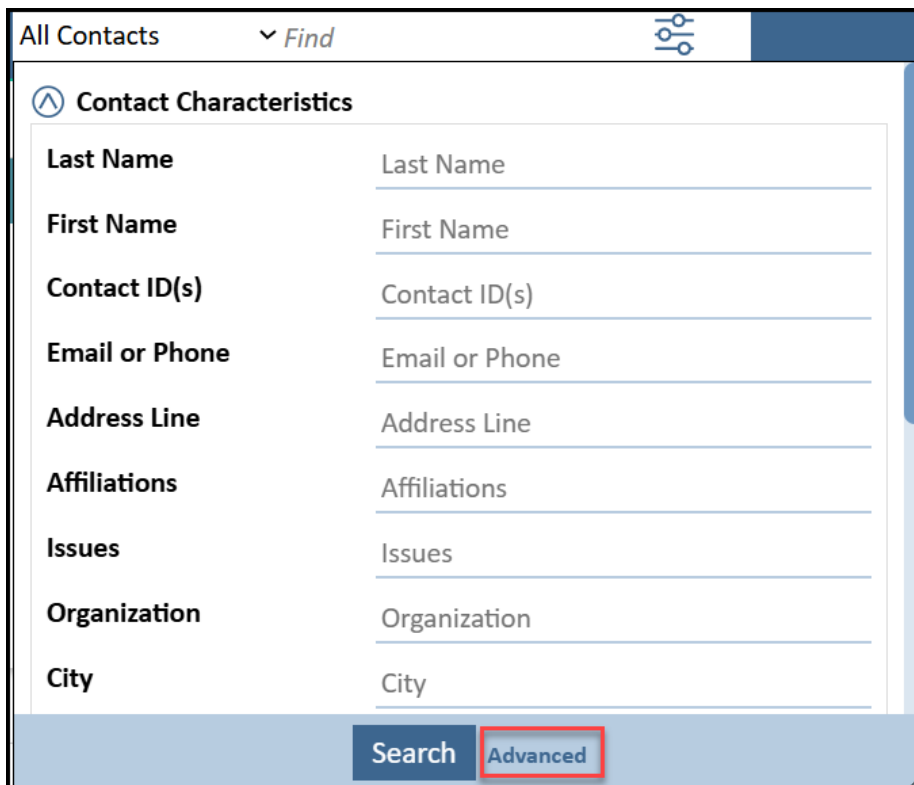
Market: House, Senate

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.

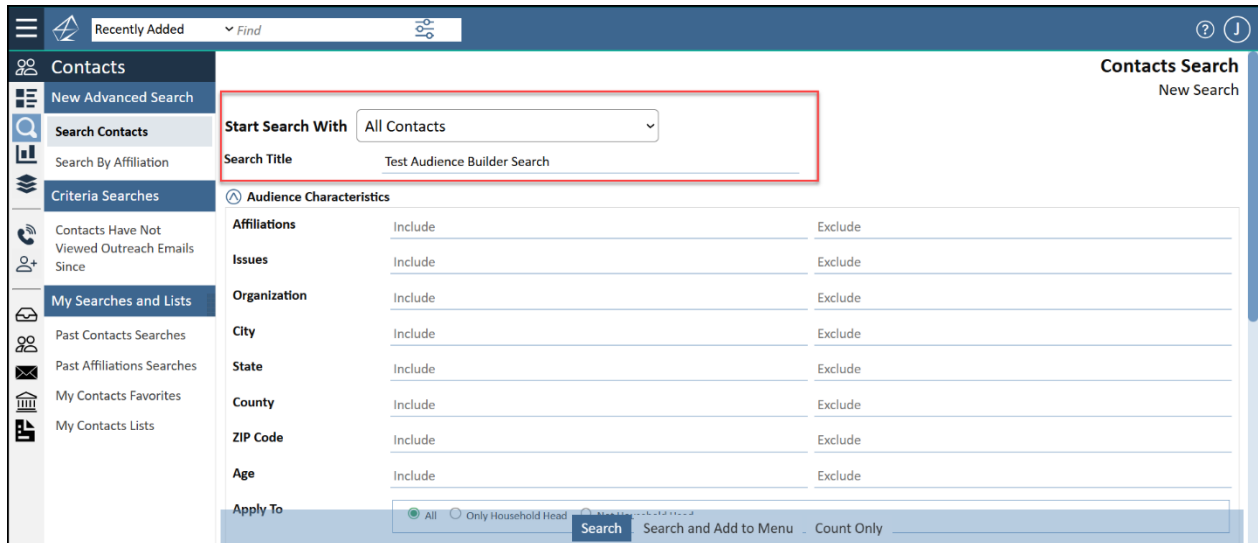


2. The Contact Characteristics window is displayed. Select the **Advanced** button.



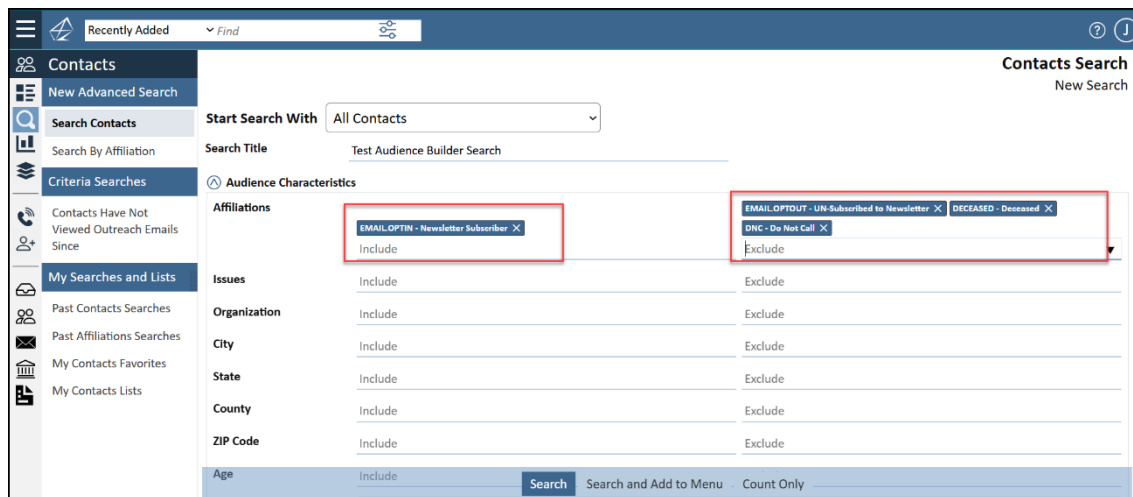
The screenshot shows the 'Contact Characteristics' window. At the top, there is a header bar with 'All Contacts' and a dropdown arrow followed by 'Find'. To the right of the header bar, there is a button with a gear icon. Below the header bar, there is a list of contact characteristics, each with a label and a corresponding input field: 'Last Name', 'First Name', 'Contact ID(s)', 'Email or Phone', 'Address Line', 'Affiliations', 'Issues', 'Organization', and 'City'. At the bottom of the window, there is a blue bar containing two buttons: 'Search' and 'Advanced'. The 'Advanced' button is highlighted by a red rectangular box.

3. The **Audience Builder** feature is displayed. Select the appropriate “Start Search With” option from the dropdown, then title your search next to “Search Title” so it’s easier to find when you save it later. You may click the  to expand any of the categories.



The screenshot shows the 'Audience Builder' interface. On the left is a sidebar with navigation options: 'Contacts', 'New Advanced Search', 'Search Contacts', 'Search By Affiliation', 'Criteria Searches', 'Contacts Have Not Viewed Outreach Emails Since', 'My Searches and Lists', 'Past Contacts Searches', 'Past Affiliations Searches', 'My Contacts Favorites', and 'My Contacts Lists'. The main area is titled 'Contacts Search' with a 'New Search' link. It features a 'Start Search With' dropdown menu set to 'All Contacts' and a 'Search Title' field with the text 'Test Audience Builder Search'. Below these is a table for 'Audience Characteristics' with columns for 'Include' and 'Exclude' for various attributes: Affiliations, Issues, Organization, City, State, County, ZIP Code, and Age. At the bottom, there are radio buttons for 'All' (selected) and 'Only Household Head', and buttons for 'Search', 'Search and Add to Menu', and 'Count Only'.

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



This screenshot shows the 'Audience Characteristics' table with search criteria entered. In the 'Include' column, 'EMAIL.OPTIN - Newsletter Subscriber' is entered. In the 'Exclude' column, 'EMAIL.OPTOUT - UN-Subscribed to Newsletter', 'DECEASED - Deceased', and 'DNC - Do Not Call' are entered. The interface includes the same sidebar and top navigation as the previous screenshot, with the 'Search' button highlighted at the bottom.

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More - Geography

Apply To

☒ All Addresses
☐ Primary Addresses
☐ Preferred Only

Address Type

☒ Either
☐ Home Only
☐ Business Only

Congressional District

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.

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Search Options

Combine Entries With

☒ And
☐ Or

Case Sensitive

☐ Yes
☒ No

Wildcard Character

*

Delimiter Character

,

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.

Search

Search and Add to Menu

Count Only

Note: After you have conducted your search, you can click on the search icon, go to **Past Contact Searches** to find and share these previous searches with other users in your office. Just click to **edit** the search and choose to **Share with Other Users**.