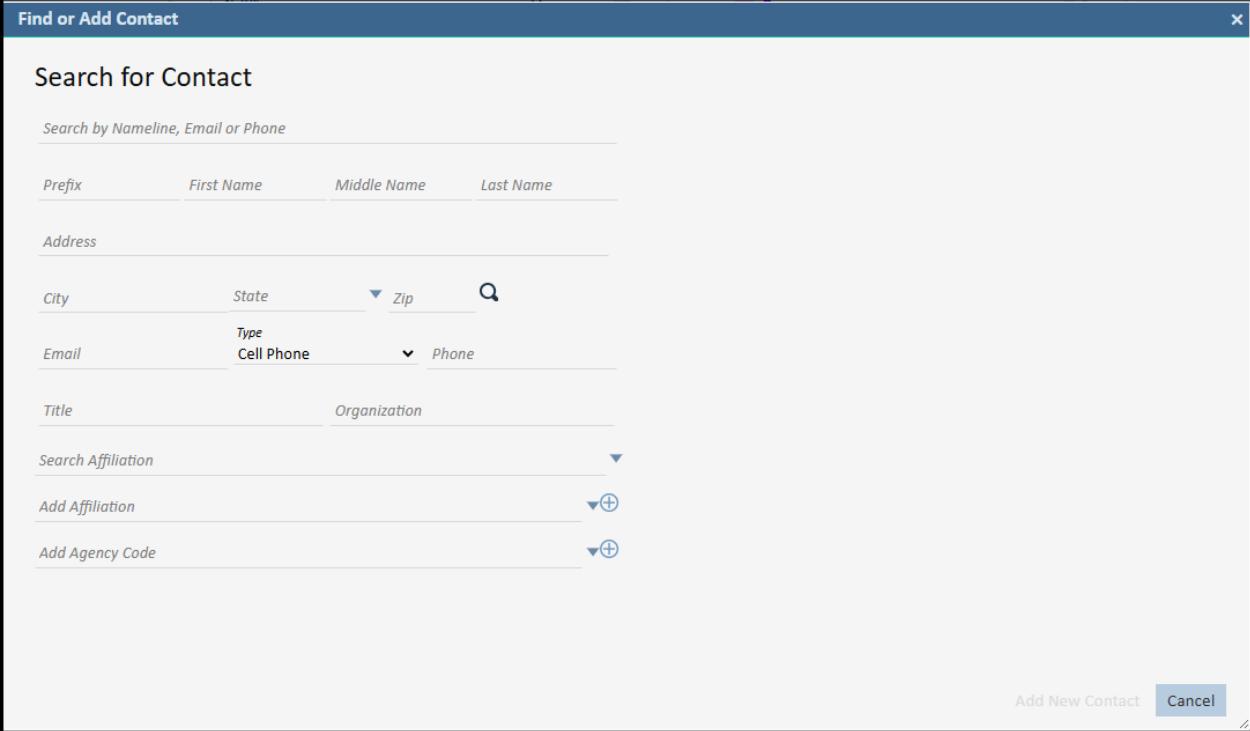


## Creating/Searching for a Contact Record

**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 Nameline, 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 

**Results**

<input type="radio"/> Bravo, Dr. John M. Incomplete Address Elected official; Veteran - Thank them for their service	ID: <a href="#">7183547</a> Messages Open: 0 Closed: 0 Services Open: 0 Closed: 0
<input type="radio"/> Bravo, Mr. Johnny C. 12134 Monument Dr., Fairfax, VA 22033-5531 johnnynickelodeon@fakeemail.com, (098) 765-4321 (H), <span style="text-decoration:line-through;'>(410) 000-0000</span> (C), 202-333-6556 (B) Frequent Writer - High Volume; Veteran - Thank them for their service	ID: <a href="#">7118241</a> Messages Open: 63 Closed: 264 Services Open: 22 Closed: 143

**Buttons**

[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/line, Email or Phone

Prefix	First Name Aubrey	Middle Name	Last Name Quorum
Address 12134 Monument Dr			
City Fairfax	State VA - Virginia	Zip 22033	VA11
Email aubreyq@fakemail.com	Type Cell Phone	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

Aubrey Quorum  aubreyq@fakemail.com

General      Discuss      Logs

Email Addresses  aubreyq@fakemail.com ★

Phone Numbers  C: (098) 765-4321 ★

Social Networks 

Home  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	Middle	Last	Appellation
	Aubrey		Quorum	
Formal Salutation			Informal Salutation	
			Aubrey	
Household Salutation			Household Name	
Quorum and Family			The Quorum Family	
Couple Name			Couple Formal Salutation	
Couple Informal Salutation			Birthday	mm/dd/yyyy <input type="text"/>
Comments				

ID#7184650  
Row 1

[Save & Close](#) [Save](#) [Close](#)

Edit Contact

**Aubrey Quorum**



[Name](#) [Comms](#) [Addresses](#) [More](#)

[Add Communication !\[\]\(d71b89c738443dfadb0dd7ae0571eda0\_img.jpg\)](#)

 Type Email   
Email   
aubreyq@fakemail.com

Description

Primary

 Type Cell Phone   
Cell Phone   
0007664321

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

