
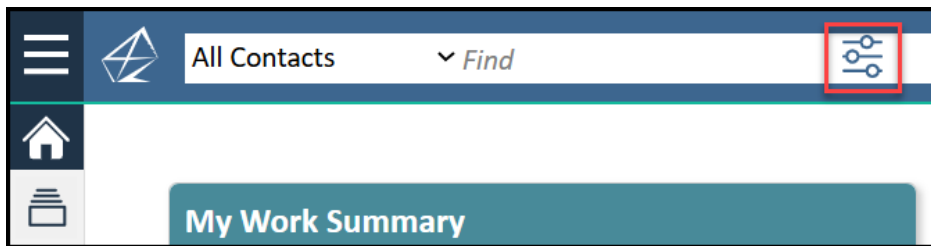


Using the IQ Audience Builder

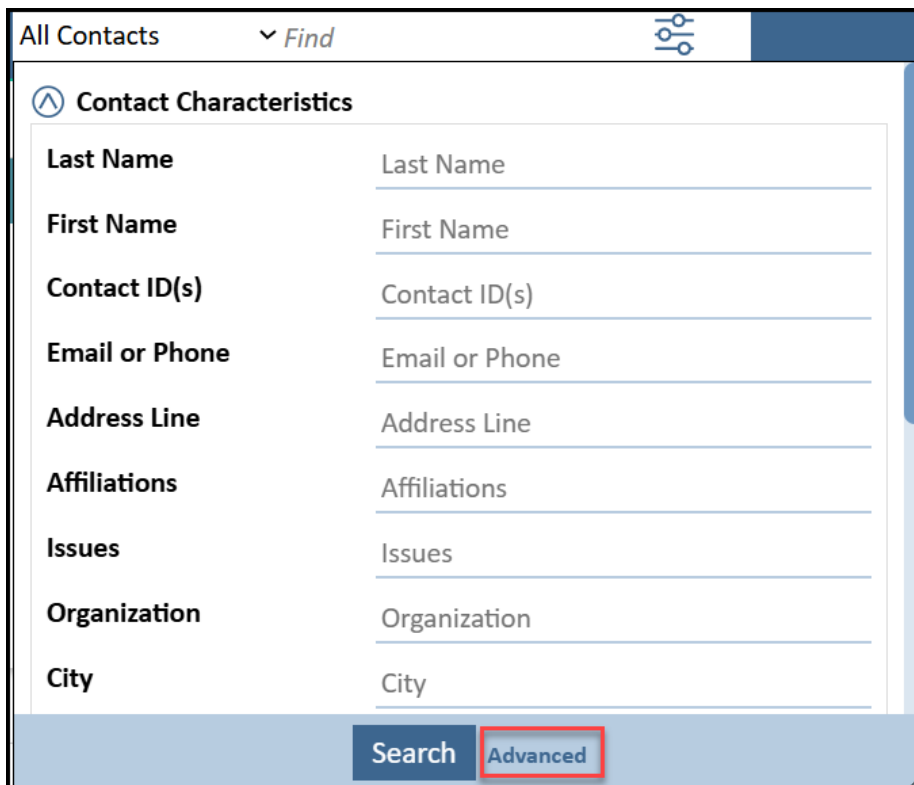
Market: House, Senate

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.

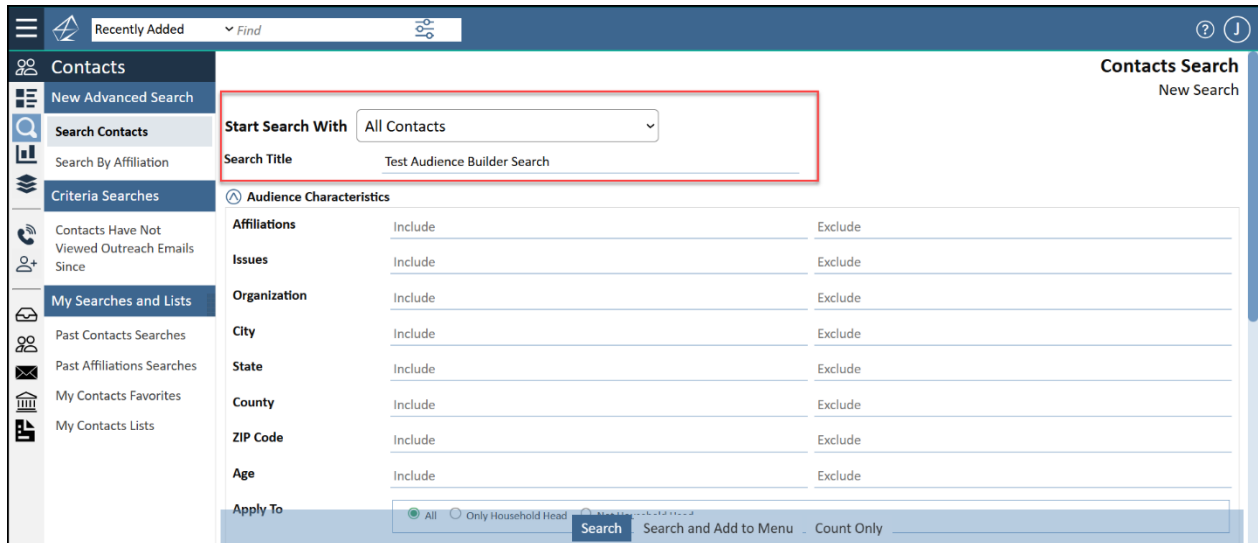


2. The Contact Characteristics window is displayed. Select the **Advanced** button.



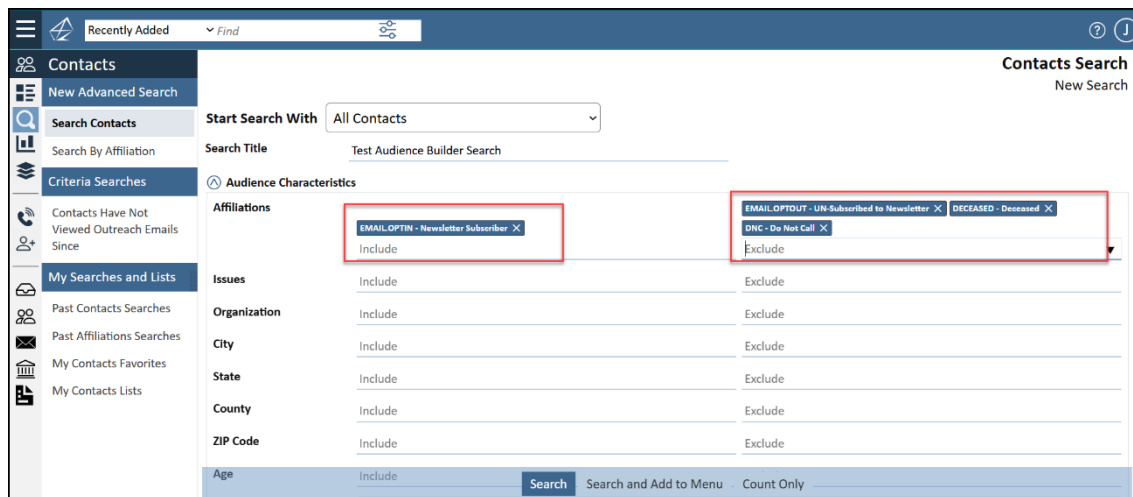
The screenshot shows the 'Contact Characteristics' window. At the top, there is a header bar with 'All Contacts' and a dropdown arrow, and a 'Find' button. Below the header, there is a list of contact characteristics with input fields: Last Name, First Name, Contact ID(s), Email or Phone, Address Line, Affiliations, Issues, Organization, and City. At the bottom of the window, there are 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 name you’re 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, and My Searches and Lists. The main area is titled 'Contacts Search' and 'New Search'. It features a 'Start Search With' dropdown menu set to 'All Contacts' and a 'Search Title' field containing 'Test Audience Builder Search'. Below these is a table for 'Audience Characteristics' with columns for 'Include' and 'Exclude' for various attributes like 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** in the left column and **Exclude** in the right column.



The screenshot shows the Audience Builder interface with the 'Include' and 'Exclude' columns populated. The 'Include' column has a red box around the 'EMAIL.OPTIN - Newsletter Subscriber' attribute. The 'Exclude' column has a red box around the 'EMAIL.OPTOUT - UN-Subscribed to Newsletter', 'DNC - Do Not Call', and 'DECEASED - Deceased' attributes. The 'Search' button is 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**.