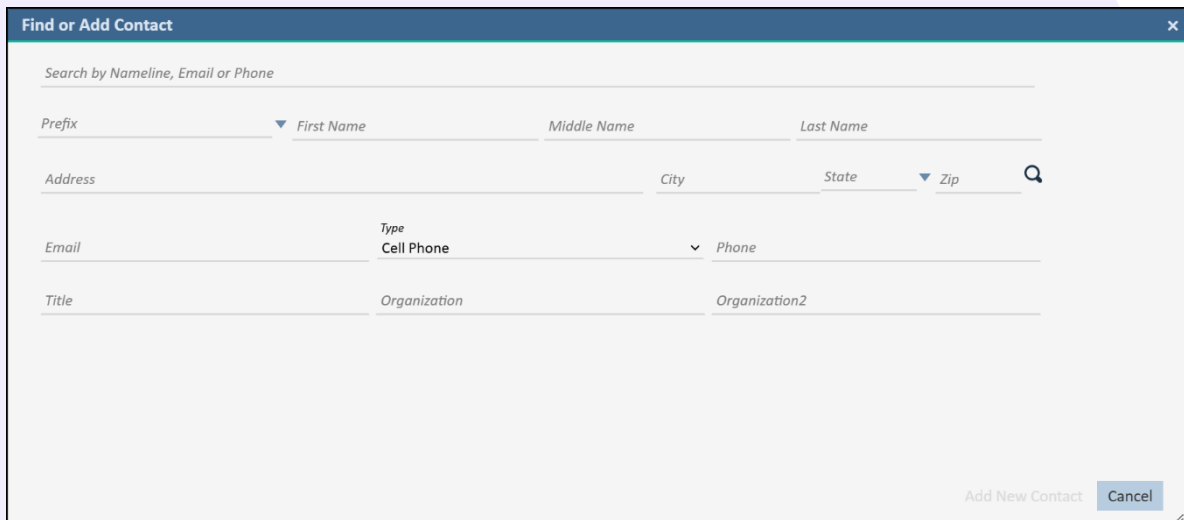


Creating/Searching for a Contact Record

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 below as shown below:

Find or Add Contact

Search by Name, Email or Phone

John Quorum

Prefix First Name John Middle Name Last Name Quorum

Address City State Zip

Email Type Cell Phone Phone

Title Organization Organization2

☐ **Quorum, Jack**
 Incomplete Address
 (475) 000-0000 (C)
 Newsletter Subscriber
 ID: 7118179
 Messages Open: 10 Closed: 33
 Services Open: 1 Closed: 34

☐ **Quorum, Mr. and Mrs. Jack**
 Incomplete Address
 Newsletter Subscriber; TRADESMAN; Veteran - Thank them for their service
 ID: 7184618
 Messages Open: 1 Closed: 0
 Services Open: 0 Closed: 0

Add New Contact Cancel

3. If no match appears, type in additional information such as the constituent's **address, city, state, email, phone number, etc.** Each additional field will add to the search in your database, ensuring the contact does not exist and no duplicate will be created.

- a. ***Note:** When adding the address information, click on the  icon to verify the constituent's address and see their District. Address Verification will still occur if you do not click this button and instead click on "Create New Contact".

Find or Add Contact

Search by Name, Email or Phone

Prefix First Name John Middle Name Last Name Quorum

Address City State Zip

12134 Monument Dr Fairfax VA - Virginia 22033

VA11 Email Phone

jqorum@fakemail.com Cell Phone 1234567890

Title Organization Organization2

Add Contact (VA11) Cancel

4. Click **Add Contact**.

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!

Prefix and Salutation Information

Affiliation Codes

Edit Contact

John Quorum



Name

Comms

Addresses

More

Prefix

First

Middle

Last

Suffix

Appellation

Formal Salutation

Informal Salutation

Household Salutation

Household Name

Couple Name

Couple Formal Salutation

Couple Informal Salutation

Birthday

Comments

Attachments

Affiliations

ID#7184801

Row 1

Save & Close

Save

Close

Communication Information

Edit Contact

John Quorum



Name

Comms

Addresses

More

Add Communication

Type

Email

Email

jquorum@fakemail.com

Description

Primary

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

John 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

City

City
Fairfax

State
VA - Virginia

Zip
22033

Country
United States

County
Fairfax

Precinct

Cong. District
VA11

State House

State Senate

ID#7184801
Row 1

Save & Close Save **Close**