
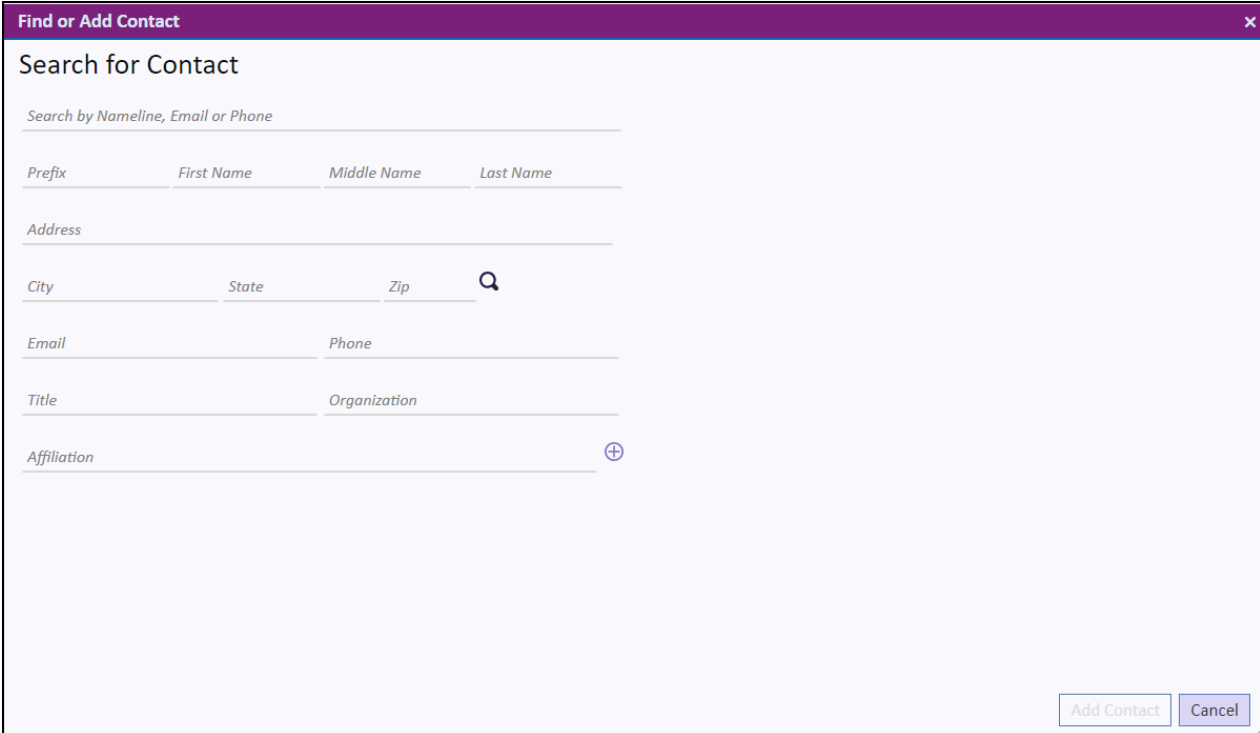


Creating/Searching For a Contact Record

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

Phone

Title

Organization

Affiliation

Bravo, Dr. John M.

Incomplete Address

Elected official; US Vet

ID: 7183547

Messages Open: 0

Closed: 0

Services Open: 0

Closed: 0

Bravo, Mr. Johnny C.

7990 Quantum Dr., Vienna, VA 22182

johnnyb@fakemail.com, (098) 765-4321 (H), (410) 000-0000 (C), 202-333-6556 (B)

US Vet

ID: 7118241

Messages Open: 45


Closed: 228

Services Open: 17

Closed: 113

Add 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 Nameline, Email or Phone

Prefix

First Name

Middle Name

Last Name

Talia

Smith

Address

12134 Monument Drive

City

State

Zip

Fairfax

Email

Phone

taliasmith@fakemail.com

1234567890

Title


Organization

Affiliation

Add Contact

Cancel


- 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.) and address information.





Talia Smith
taliasmith@fakemail.com

General


ActivityDiscussLogs

Email Addresses 

Phone Numbers 

 taliasmith@fakemail.com ★


H: (123) 456-7890 ★

Home 

12134 Monument Drive
Fairfax

Head of a 1 Member Household

Edit

Add MessageAdd Service 

Edit Contact

Talia Smith

Name

Communications

Addresses

More

Prefix

Ms

×

▼

First

Talia

Middle

Last

Smith

Suffix

Appellation

Formal Salutation

Ms. Smith

Informal Salutation

Talia

Household Salutation

Ms. Smith and Family

Household Name

The Smith Family

Couple Name

Couple Formal Salutation

Couple Informal Salutation

Birthdate

mm/dd/yyyy

Comments

Attachments

Affiliations

Agency Code

Agency Category

ID#7183759

Row 1

Save & Close

Save

Close

Edit Contact

Talia Smith

Name

Communications

Addresses

More

Add Communication

Type

Home Phone

▼

Home Phone

1234567890

Description

☒ Primary

☐ Do Not Call

☐ Do Not Text

☐ Text Optin

Type

Email

▼

Email

taliasmith@fakemail.com

Description

☒ Primary

ID#7183759

Row 1

Save & Close

Save

Close

Edit Contact

Talia Smith

Name

Communications

Addresses

More

Preferred Primary Type

☒ Home
 ☐ Business

Add Address

Select Address

H: 12134 Monument Drive, Fairfax*

Address Type

☒ Home
 ☐ Business
 ☐ Residential
 ☒ Primary
 Preferred Primary

Address Line 1

12134 Monument Drive

Address Line 2

City

Fairfax

State

Zip

+4

Country

County

Precinct

District

United States


ID#7183759

Row 1

Save & Close

Save

Close

NOTE: In the **Addresses** tab, be sure to add the **Street Name → Zip Code in the City field → Click the  icon** to have IQ5 automatically fill in and verify the address information. Also, **Affiliation** codes are IQ customized codes for groups 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!