# Importing Contact Records into IQ

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to import contact records into IQ. It is recommended to contact your IQ Consultant when conducting this activity.

1. In the Excel sheet that contains the information to import into IQ, confirm that the column titles are well-defined (i.e., **First Name**, **Last Name**, etc.)

2. Once the Excel sheet data has been reviewed, save the Excel file using the format below.

Text (Tab delimited) (*.txt)

3. In IQ, navigate to **Contacts > New > Import.**
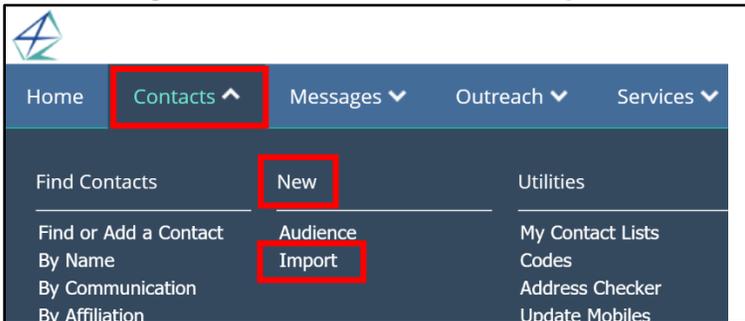
4. In IQ, a **Set** refers to a set of records that are imported into IQ. Enter the name of your set and select **Import**.
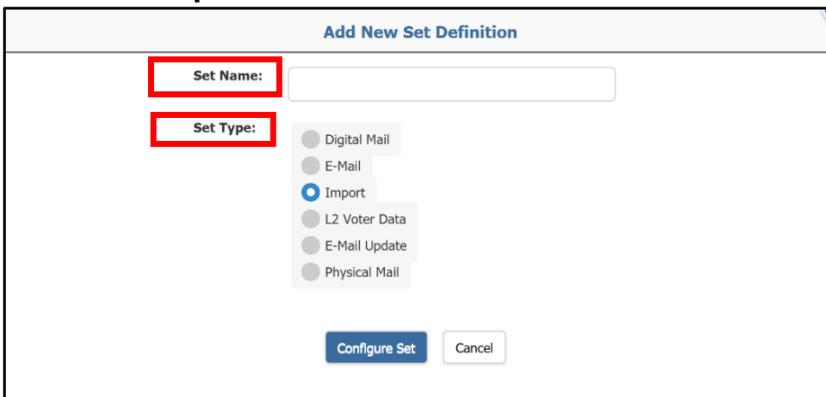
5. Complete the fields. Click **Save and Select Import File**.

a. **Set Name** and **Source** are grayed out since they were completed at the previous screen.

b. **Create**: this dropdown determines if you create only a contact, a contact with a message, or multiple contacts within an IQ Outreach (i.e. newsletter, survey) audience.

c. **Status**: This determines the status of the message (i.e. open or closed).

d. **Description**: This will be the description in the contact record.

e. All sections below **Description** pertain to the contacts that will be created. For example, affiliation codes and/or service codes can be added to the contacts upon import to make it easier to find them later.

6. The **Import File** window appears on the screen.

a. **Import File:** choose the file you saved in Step 2.

b. **File Type:** select **Tab Delimited or CSV** depending on how you have saved your excel sheet.

    c. **Duplicate**: This checkbox provides you the option of enabling IQ's Duplicate Checker to run. It is a best practice to keep this selected, as this will prevent IQ from importing duplicate contact records.

    d. **First Line (Ignore Headers):** Select this option if your data has column titles on the first row so that this row will not imported as a contact record.

    e. Click **First Record** to update and review the fields that need to be imported.

7. Under the **Map to IQ Field**, use the dropdowns to choose the details added to the contact record. It is best practice to review at least three records to ensure the Excel file is uploaded successfully. Click **Import Now** to import your contacts. Use **Background Import** if you have a very large file or you are importing contact records with additional information such as attached messages.

8. A new set of information is displayed.

Enter the date and time that the import process will occur. A best practice is set it at least 2 minutes ahead. Enter the email address (es) of whom you would like to be notified when the import process is complete.

9. When the import is complete, review the list of contacts. IQ will "match" contacts with existing records and create "new" records if needed.
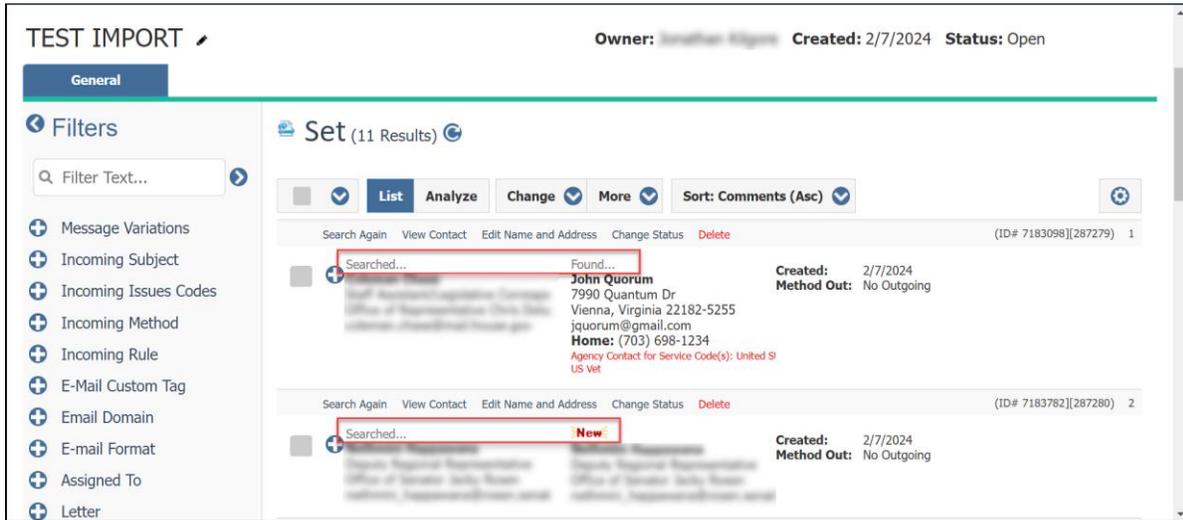
10. Click "Search again" above a contact to confirm a contact is new and/or has been matched with the correct existing record.

11. When ready, select all the contact in the list → change → status → posted. Click Save. This will complete the import and bring the contacts into your database.