

## How to Import Contact Records into IQ

**Market:** Federal/State/Local, House, Senate

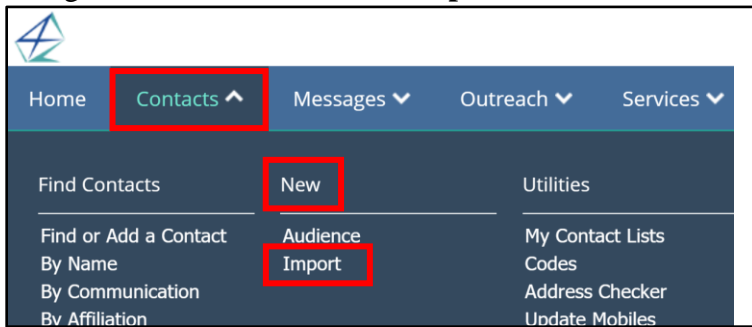
**Module:** Contacts

**Purpose:** This guide provides instruction on how to import a list of contacts into IQ. It is highly recommended to contact and collaborate with your Office IQ Consultant to conduct this process.

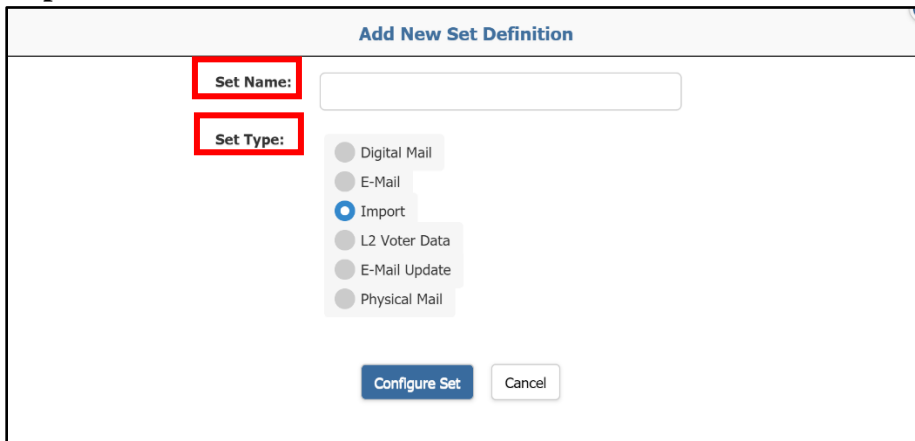
### Key Benefits

IQ provides the capability to import large sets of contacts (e.g. press contacts, agency contacts, etc.) to avoid the need of adding individual records. Thus, this is a time-saving technique.

#### 1. Navigate to **Contacts > New > Import**.



#### 2. In IQ, a **Set** refers to a set of records that are imported into IQ. Type the name of your set and select **Import**.



3. Complete the fields. Select **Save and Select Import File**.

### Edit TRAINING SET Definition

<b>Set Name</b>	<input type="text" value="TRAINING SET"/>
<b>Source</b>	<input type="text" value="Import"/>
<b>Create</b>	<input type="text" value="Only Contacts"/>
<b>Status</b>	<input type="text" value="Open"/>
<b>Description</b>	<input type="text" value="Created on 2/15/2021 4:07:33 PM by Jonathan Kilgore"/>
<b>Affiliations</b>	<input type="text" value="Select affiliation Codes ..."/> <span style="float: right;">+</span>
<b>Service Codes</b>	<input type="text" value="Select Workflow Codes ..."/> <span style="float: right;">+</span>
<b>Service Categories</b>	<input type="text" value="Select Workflow Category Codes ..."/> <span style="float: right;">+</span>

4. Select **Choose File**.

### Import File

**Import File** Choose File No file chosen

**File Type**   **Duplicate Check**

**First Line**  **Ignore (header)**  **Import (data)**

5. This step will vary depending on the location of the records. Once selected, click **Open**.