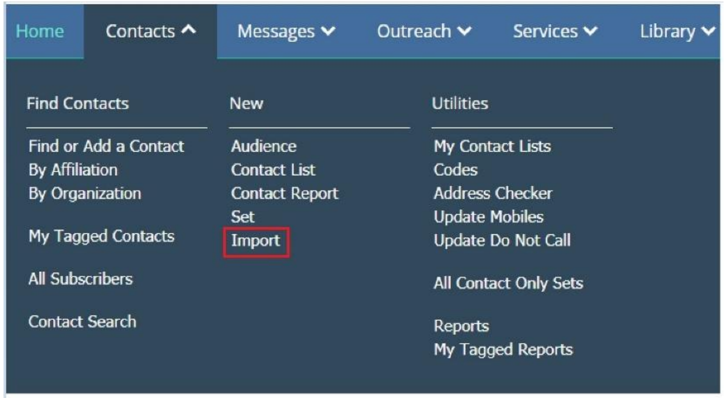
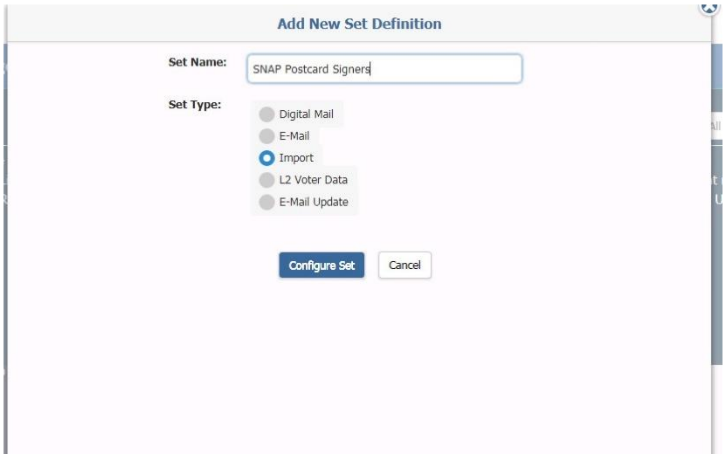
How to Import Contacts into IQ

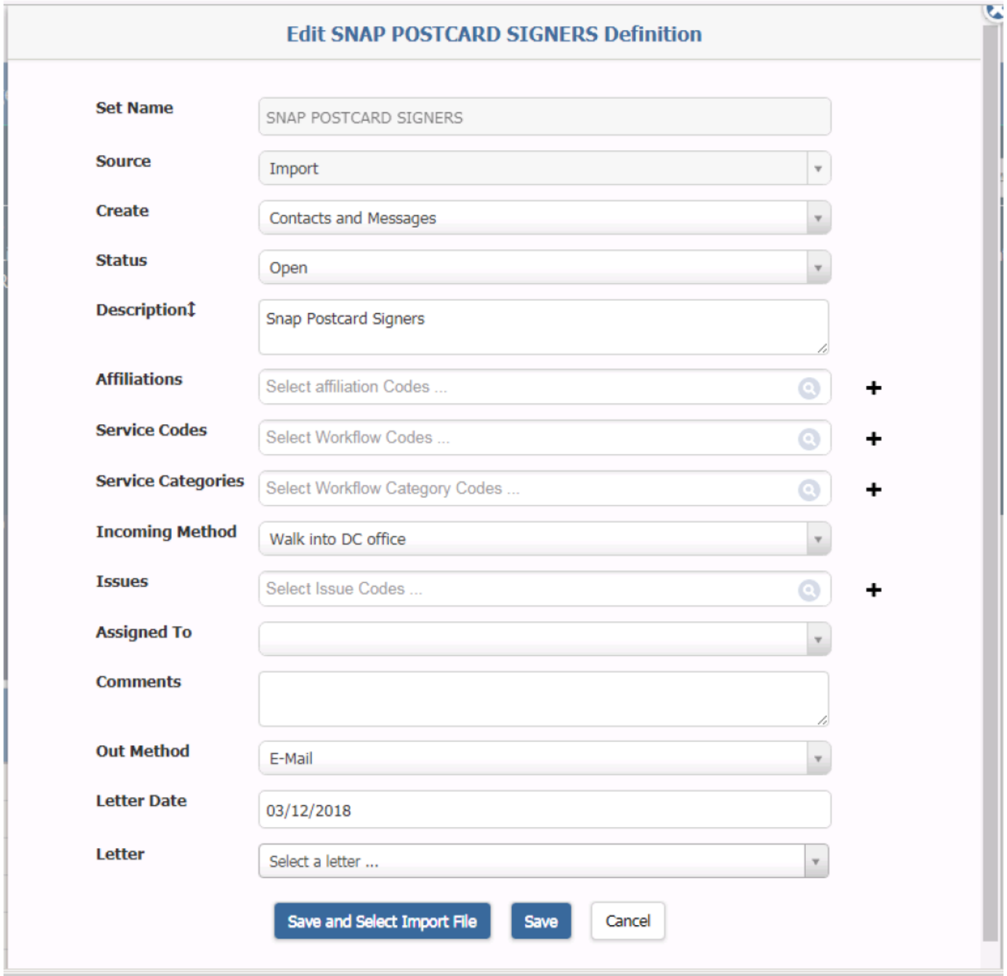
1. First, clean up the excel sheet so there are clearly defined fields for each Column. (Column A – First Name, Column B– Last Name, etc.)
2. Once data is confirmed to be consistent, save the file as a Text (Tab delimited) file format.
3. In IQ, go to Contacts -> Import to begin the process



4. The first screen allows you to name the set all contacts will be going into, and choosing what form of data you are inputting. If importing from a Microsoft Excel document, choose “Import”



5. The next screen will allow you to choose what will be created for each contact.
<u>Set Name</u> and <u>Source</u> are grayed out since they were input on the previous screen
<u>Create</u> – this dropdown determines if you create just a contact, a contact with a message, or contacts in an outreach audience
<u>Status</u> – This determines the status of the message, open or closed
<u>Description</u> – This will be the description in the contact

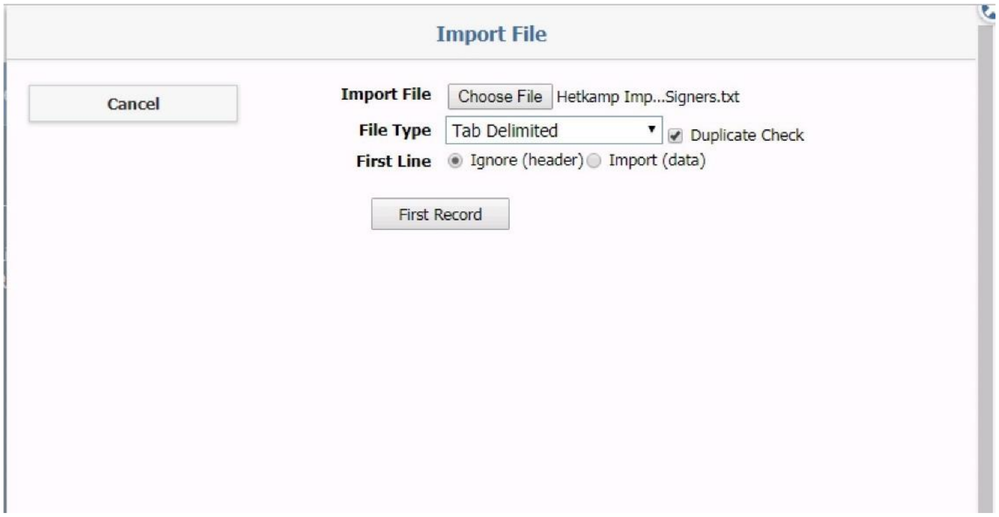


6. All sections below Description pertain to the message that will be created, allowing service codes, issue codes, and other information to be added to the message.

a. At the “Import File” screen, choose the Text (Tab Delimited) file you created before. Then, change the File Type to Tab Delimited. The checkbox to the right of “File Type” will determine whether or not Duplicate Checker will run. This will increase the time it takes to finish the import, but will keep the database free of unnecessary new contacts.

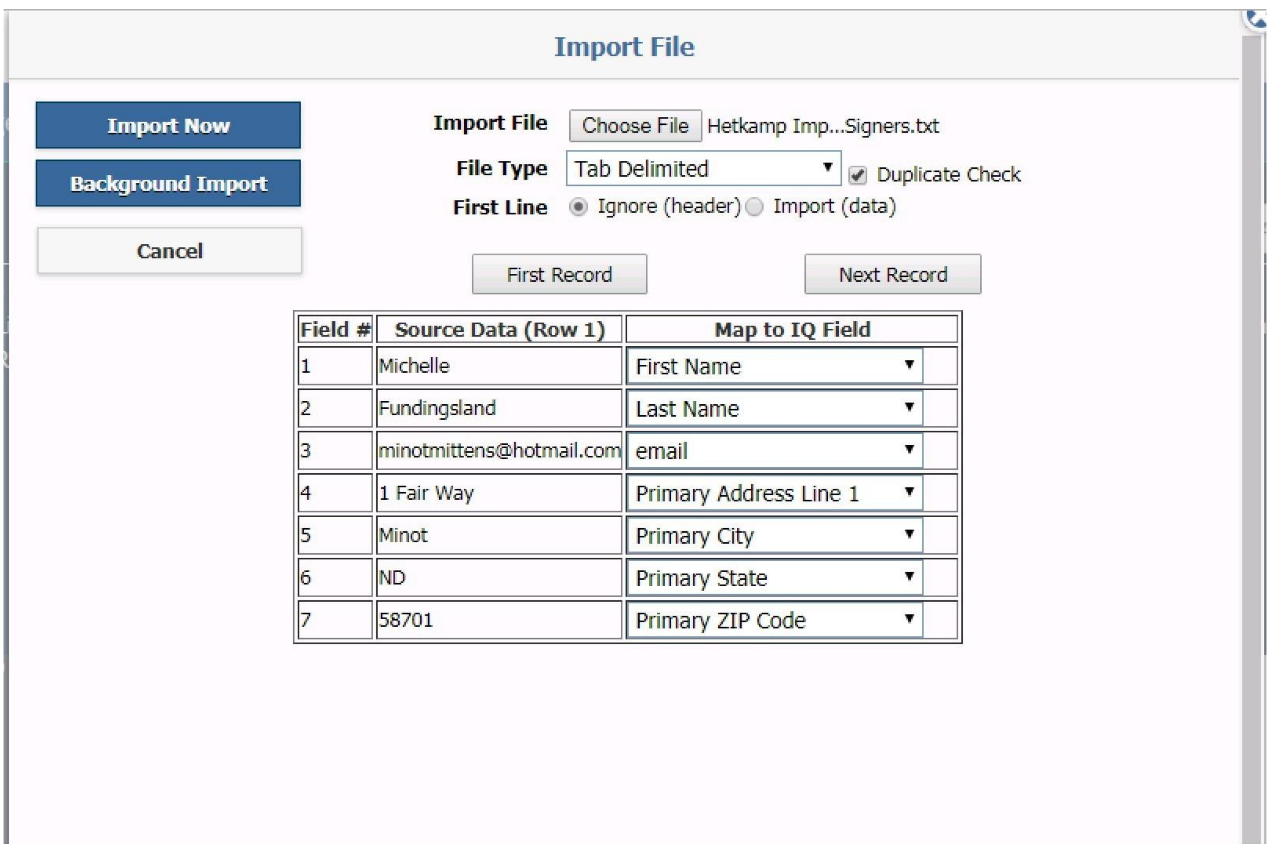
b. Be sure to review your Excel file to see if you had headers or not, to ensure you do not make a contact out of the headers.

c. After all selections, click “First Record” to update and review the fields that need to be imported.



7. Use the dropdowns under “Map to IQ Field” in order to choose what details you would like added to the contact record. It is recommended you review at least three records to ensure the Excel document was uploaded successfully.

a. It is recommended to import records in the background, especially if they will have messages attached to them.



8. In the background job creation tool, ensure the background job will start sometime in the future (at least 2 minutes in the future), and add the email addresses you would like notified when the job is completed.