

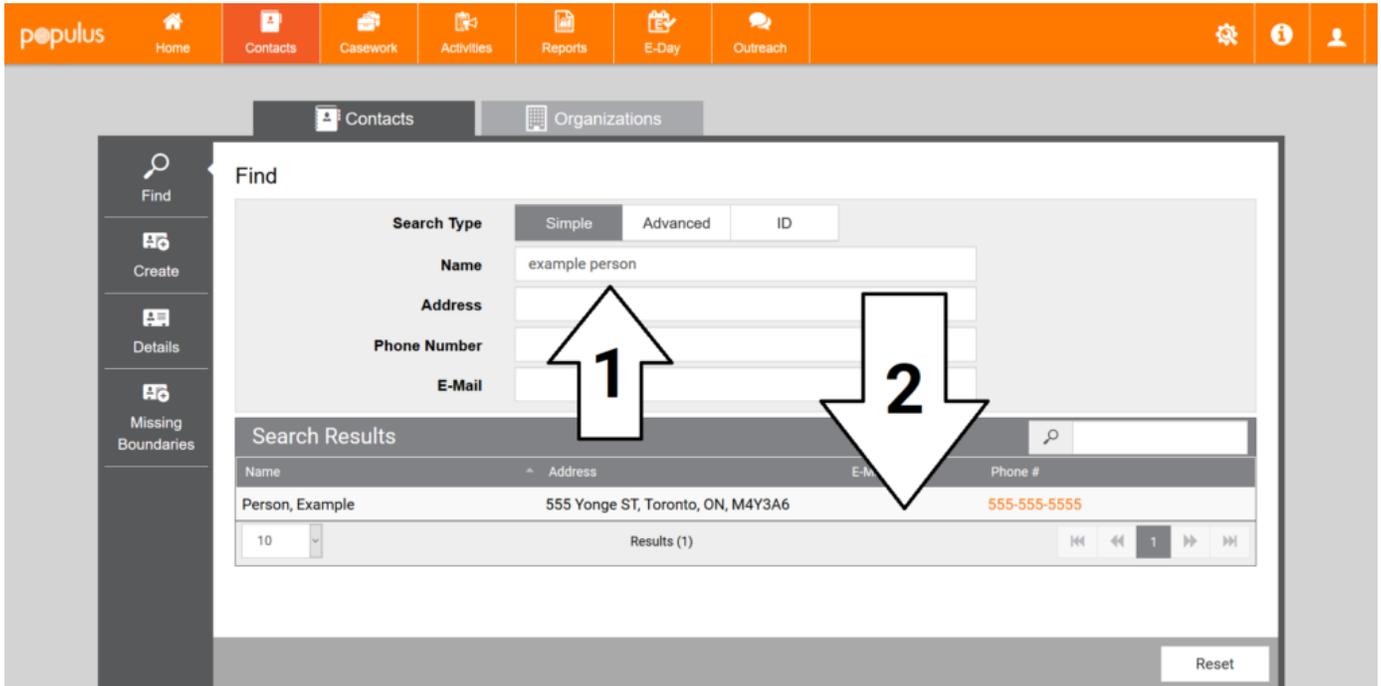
# + Adding a Contact

**i** Before you add a contact in Populus, you want to make sure they don't already exist in the database. They could have recently moved into the riding, for example, and we don't want to create duplicates.

## Check if the Contact Already Exists

The screenshot shows the Populus web application interface. The top navigation bar is orange and contains icons for Home, Contacts, Casework, Activities, Reports, E-Day, and Outreach. The main content area is white and features a 'Welcome, James!' message, a calendar showing 'January 21, 2019 MONDAY', and a 'CURRENT REGIONAL CONTEXT' section with details for 'OUTREACH CAMPAIGN 2017FB', 'REGION Ottawa-Vanier', and 'CONSTIT. OFFICE None Selected'. Below these are four main action cards: 'Contacts' (Find, Add or Edit Contacts), 'Casework' (Track and Manage Issues and Interactions with Contacts), 'Manage Activities' (Create, Track, and Update Activities with your Contacts), and 'Canvass Sheets' (Enter Data for Canvass Sheets). A 'QUICK LINKS' section on the right includes 'Notification History', 'Modify Password', 'Populus Support', and 'User Guide'. A white arrow points to the 'Contacts' tab in the top navigation bar.

If the contact has recently moved into the riding, it's likely they exist in Populus but with the wrong address. First, navigate to the **Contacts** tab.



Type in the first and last name of the contact you are searching for. If there are too many results, try the phone number or email of the person, if you have it. If you're able to narrow it down to one result, click it to go to the contact profile of the person.

If you're not able to narrow the list down to one person, create a new contact. **Skip to the next section of this tutorial.**

## Bru, Jimmy

24 Sussex Dr, Ottawa, ON, K1G 2W9 | 613-555-5555 | jimmy.bru@parl.gc.ca Poll: 048-0

Details

History

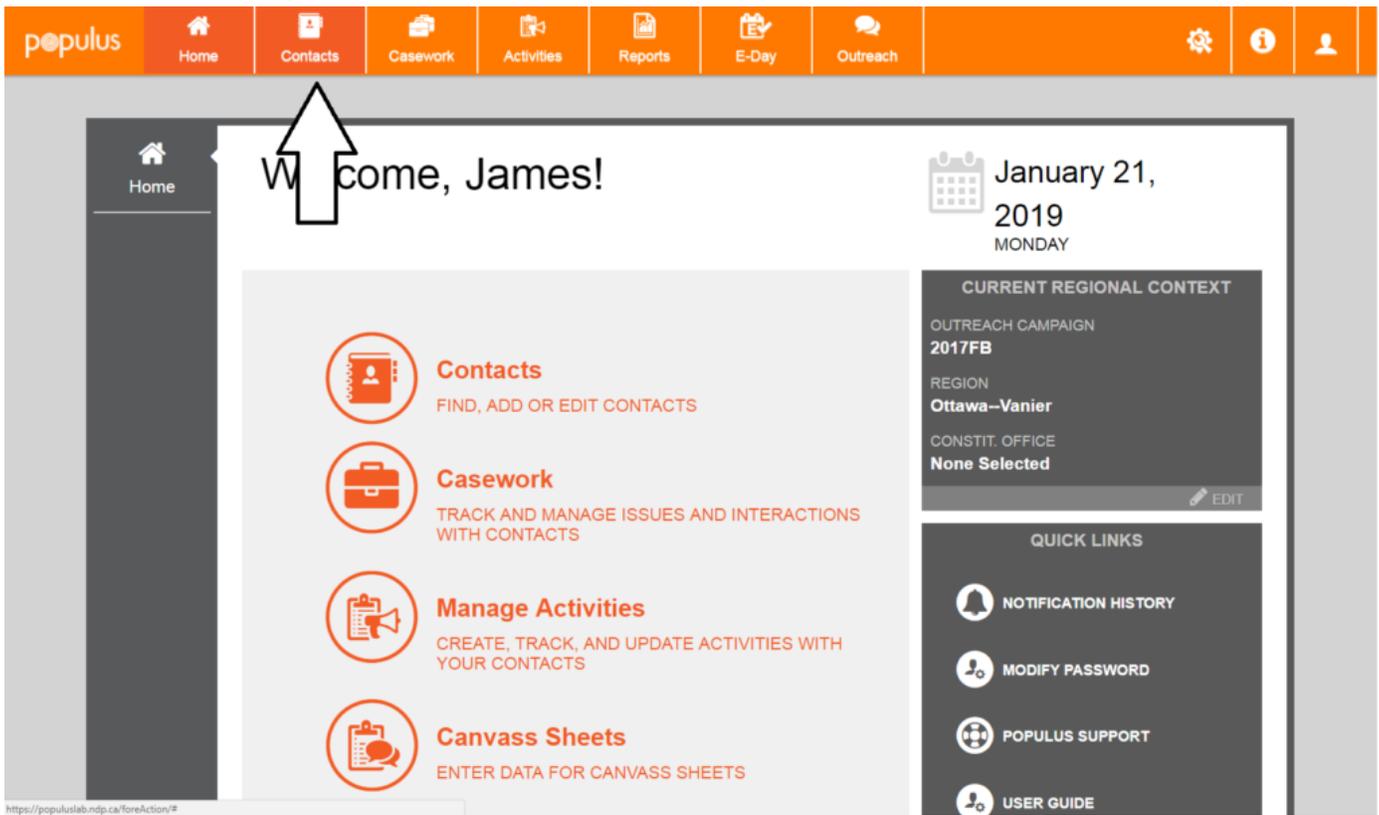
Attributes

Cases 0

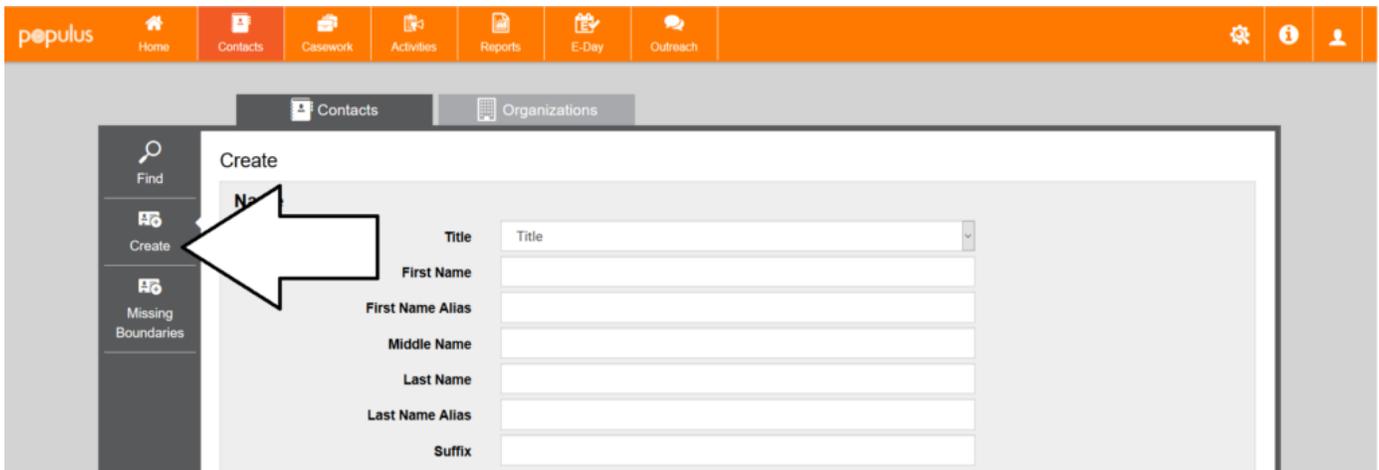
Interaction

Once you've narrowed down a result and navigated to the user's contact profile, make sure you're on the **Details** tab, and then skip to the **Adding a Name** section.

## Creating a New Contact



First, navigate to the **Contacts** tab.



Click **Create** to add a new contact. There's three important sections in the contact creation wizard:

- **Name**
- **Civic Address**
- **Phone Number/E-Mail**

**i** Of these three sections, you need at least a name and a civic address for your information to be useful. If you have only a person's name, Populus won't be able to match

it to someone on the voter's list and it'll be of little value.

## Adding a Name

This section is self-explanatory.

⚠ Make sure you don't enter anything rude here, not only because it is unbecoming of friendly campaign workers, but also because the information here might automatically appear on emails or letters that are sent to this person.

## Adding or Updating an Address

### Bru, Jimmy

24 Sussex Dr, Ottawa, ON, K1G 2W9 | 613-555-5555 | jimmy.bru@parl.gc.ca Poll: 048-0

Details

History

Attributes

Cases 0

Interaction

Navigate to the details tab of the contact profile.

#### Civic Address

Civic Address

555 Yonge St, Toronto, ON, M4Y 3A6

X

Building Notes

Apartment Notes

Scroll down to **Civic Address** section. Click **X** to clear the address if there's one already there.

#### Civic Address

Civic Address

125 main street Ottawa

+

Building Notes

Apartment Notes



Start typing in the new address (**without the apartment number**), and then press **+** to bring up the

address wizard.

**Add Address** ✕

Modify the fields below to find an existing address or create a new address.

**Address Format** Urban Rural Free Form

**Address Search**

**Street #** **125 Main Street** Ottawa, ON, Canada

**Building Suffix** 125 Main Street North Ottawa, ON, Canada

**Apt #** 125 Main Street South Ottawa, ON, Canada

**Street Name** **125 Main Street** Gatineau, QC, Canada

**Street Type** 125 Main Street Winchester, ON, Canada

**Street Direction** Street Direction ▼

**City**

**Province** Province ▼

**Postal Code**

**Country** Canada ▼

powered by Google

Clear All Cancel Add Address

A window will pop up that will try to autocomplete the address. Click the correct one. In this case, it's the first result.

### Add Address ✕

Modify the fields below to find an existing address or create a new address.

**Address Format** Urban Rural Free Form

**Address Search**

---

**Street #**

**Building Suffix**  ⓘ

**Apt #**  ⓘ

**Street Name**

**Street Type**  ▼

**Street Direction**  ▼

**City**

**Province**  ▼

**Postal Code**

**Country**  ▼

It will automatically fill in every field except for the apartment number: you'll have to enter that number if you have one. When you're done, click **Add Address** on the bottom right.

## Adding a Phone Number / Email

+ Phone Number			
613-555-5555	Mobile	▼	🚩 ✕
604-444-4444	Main	▼	🚩 ✕

+ E-Mail			
jimmy.bru@neopets.com	Home	▼	🚩 ✕
director@blackmesaresearch.gov	Work	▼	🚩 ✕
vpmarketing@weyland-yutani.com	Main	▼	🚩 ✕

These sections contain the phone numbers of a constituent. The one marked with the 🚩 is the default contact point. For phone numbers, the default number appears on the canvass sheet and is the number called in phonebanks. For emails, it appears on the canvass sheet and is the email contacted in our email campaigns.

You can add a new phone number or email by pressing the + button in the top left corner.