

Updating Multiple Contact Records

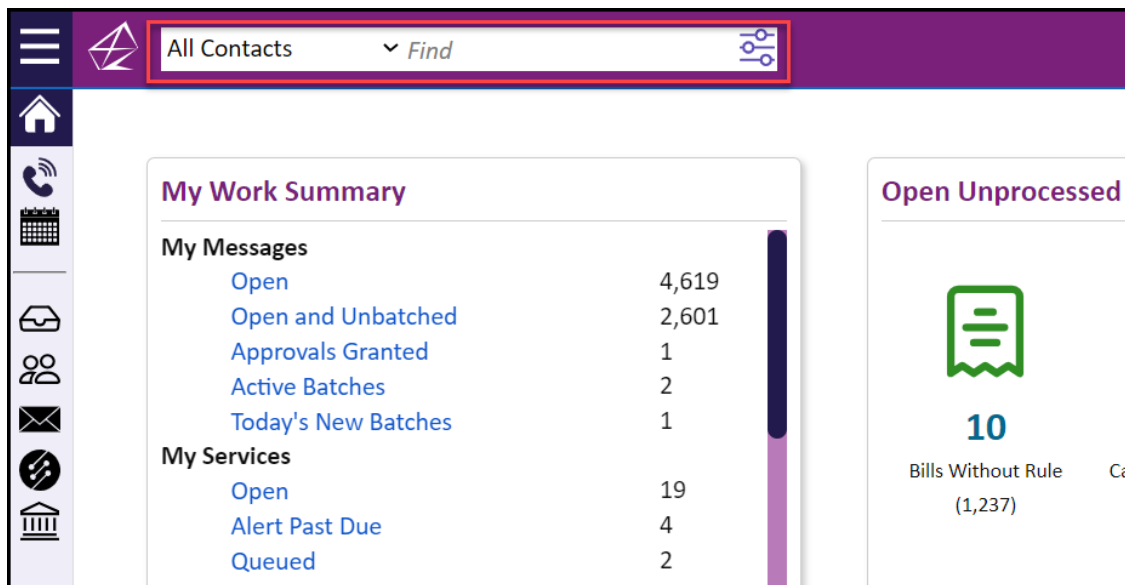
Market: House, Senate

Description: These instructions teach users how to modify information for multiple contact records.

Search for Contact Records

Option 1: Search for contact records via Contact Search

1. Search for records in the contacts search bar. Results will display in the Contacts application.



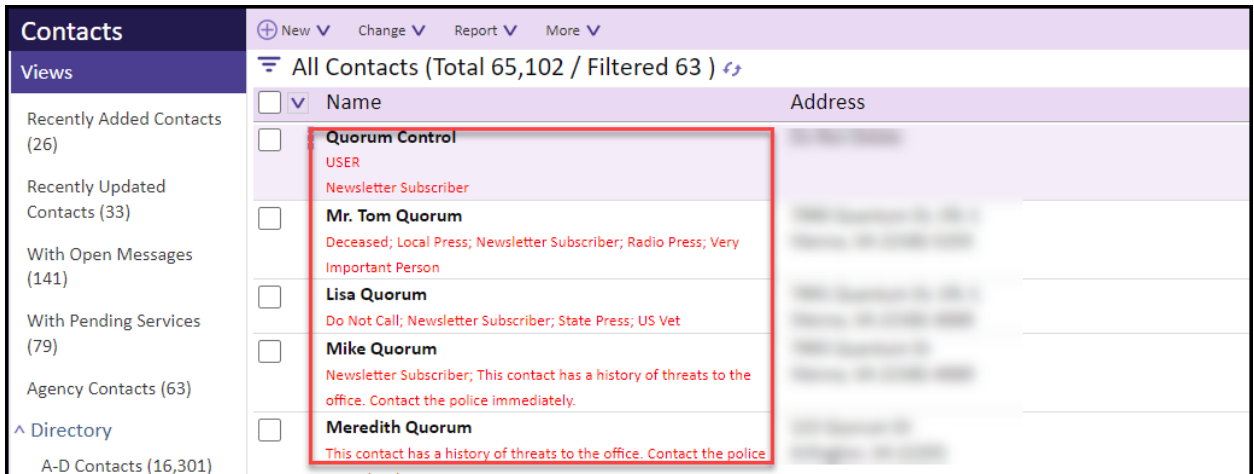
The screenshot shows the Intranet Quorum interface. At the top, there is a search bar with the text "All Contacts" and a "Find" button. Below the search bar, there is a "My Work Summary" section with a table of items. To the right, there is an "Open Unprocessed" section with a green icon and the number "10".

My Messages	
Open	4,619
Open and Unbatched	2,601
Approvals Granted	1
Active Batches	2
Today's New Batches	1

My Services	
Open	19
Alert Past Due	4
Queued	2

Open Unprocessed

10
Bills Without Rule Ca
(1,237)

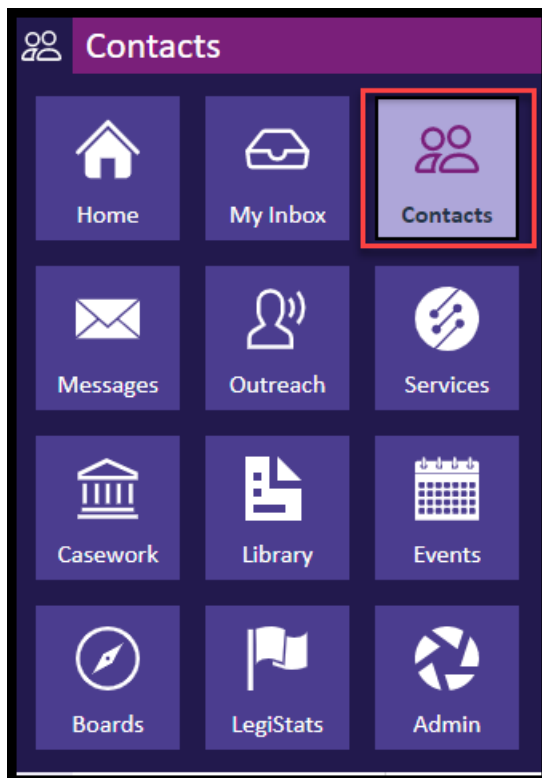


Name	Address
<input type="checkbox"/> Quorum Control USER Newsletter Subscriber	
<input type="checkbox"/> Mr. Tom Quorum Deceased; Local Press; Newsletter Subscriber; Radio Press; Very Important Person	
<input type="checkbox"/> Lisa Quorum Do Not Call; Newsletter Subscriber; State Press; US Vet	
<input type="checkbox"/> Mike Quorum Newsletter Subscriber; This contact has a history of threats to the office. Contact the police immediately.	
<input type="checkbox"/> Meredith Quorum This contact has a history of threats to the office. Contact the police	

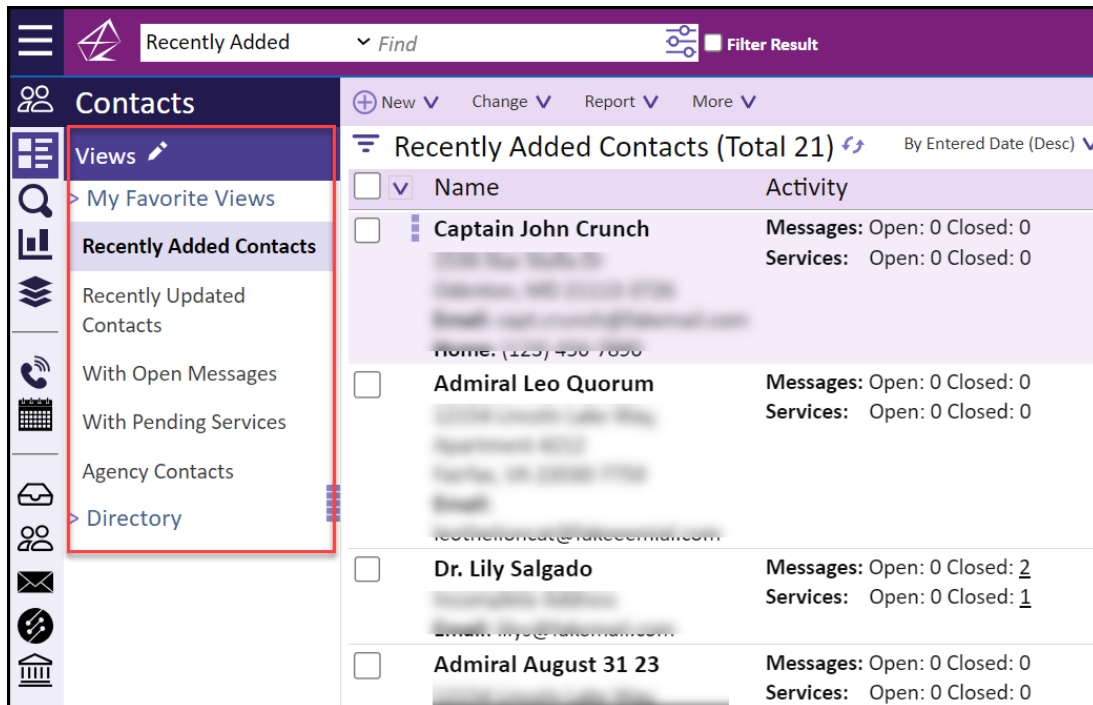
2. Go to [Selecting Multiple Records](#).

Option 2: Search for contact records via Contact Views

1. From the IQ Feature Menu, select the **Contacts** application.



2. Use the Views to search for records.



3. Go to [Selecting Multiple Records](#)

Selecting Multiple Records

1. Select the set of records to update by checking in the to the left of the name.

Search for "Quorum" (Total 103 / 103 Selected)

<input checked="" type="checkbox"/>	Name	Activity	Communication
<input checked="" type="checkbox"/>	Quorum Control Do Not Delete	Messages: Open: <u>52</u> Closed: <u>112</u> Services: Open: 0 Closed: 0	
<input checked="" type="checkbox"/>	Mr. Tom Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>97</u> Closed: <u>242</u> Services: Open: <u>25</u> Closed: <u>59</u>	
<input checked="" type="checkbox"/>	Lisa Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>21</u> Closed: <u>74</u> Services: Open: <u>8</u> Closed: <u>12</u>	
<input checked="" type="checkbox"/>	Mike Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>3</u> Closed: <u>1</u> Services: Open: 0 Closed: <u>15</u>	
<input checked="" type="checkbox"/>	Meredith Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>35</u> Closed: <u>184</u> Services: Open: <u>4</u> Closed: <u>30</u>	
<input checked="" type="checkbox"/>	Cassidy Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>30</u> Closed: <u>226</u> Services: Open: 0 Closed: <u>33</u>	
<input checked="" type="checkbox"/>	Jenifer Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>37</u> Closed: <u>253</u>	

2. Click **Change**. Select the attribute or action that you want to apply to all the selected records.

Search for "Quorum" (Total 103 / 103 Selected)

<input checked="" type="checkbox"/>	Name	Activity
<input checked="" type="checkbox"/>	Quorum Control Do Not Delete	Messages: Open: <u>52</u> Closed: <u>112</u> Services: Open: 0 Closed: 0
<input checked="" type="checkbox"/>	Mr. Tom Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>97</u> Closed: <u>242</u> Services: Open: <u>25</u> Closed: <u>59</u>
<input checked="" type="checkbox"/>	Lisa Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>21</u> Closed: <u>74</u> Services: Open: <u>8</u> Closed: <u>12</u>
<input checked="" type="checkbox"/>	Mike Quorum 799... Vienna, VA 22182-4069	Messages: Open: <u>3</u> Closed: <u>1</u> Services: Open: 0 Closed: <u>15</u>

Change

- Add/Remove Affiliations
- Add/Remove Agency Codes
- Add/Remove Agency Categories
- Merge Contacts
- Update Contact Field Household
- Update Record Security
- Configure Personal Tags