

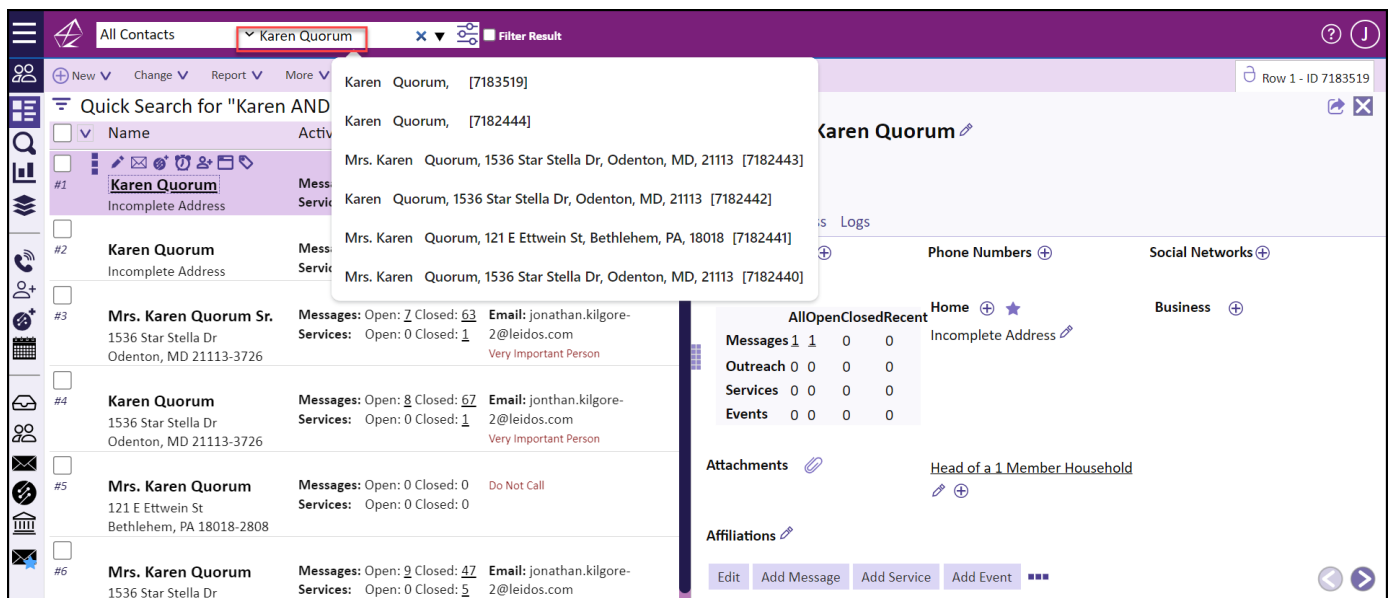
Merging Duplicate Contact Records in IQ5

Market: House, Senate

Description: These instructions teach users how to merge duplicate contact records.

Merging Duplicate Records

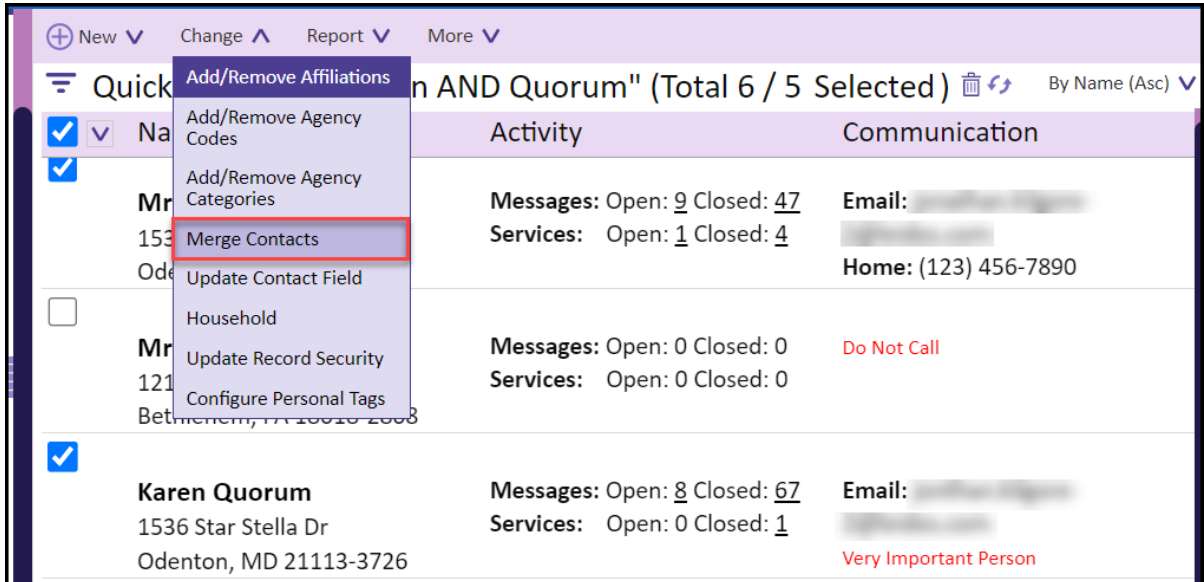
1. Navigate to the **Contacts** application and select a **View** to search from. When looking for Duplicates, it's recommended to search using one of the **Views** in the **Directory** such as **All Contacts**. Enter the name of the contact in the search bar.



The screenshot shows the 'All Contacts' view in the Intranet Quorum application. A search bar at the top contains 'Karen Quorum'. Below the search bar, a list of search results is displayed. A dropdown menu is open over the search results, showing a list of contacts with checkboxes next to them. The first contact in the dropdown is 'Karen Quorum, [7183519]'. The second contact is 'Karen Quorum, [7182444]'. The third contact is 'Mrs. Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182443]'. The fourth contact is 'Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182442]'. The fifth contact is 'Mrs. Karen Quorum, 121 E Ettwein St, Bethlehem, PA, 18018 [7182441]'. The sixth contact is 'Mrs. Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182440]'. The contact record for 'Karen Quorum' is selected on the right side of the screen.

Search Result	Message Status	Service Status	Other Info
Karen Quorum, [7183519]			
Karen Quorum, [7182444]			
Mrs. Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182443]			
Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182442]			
Mrs. Karen Quorum, 121 E Ettwein St, Bethlehem, PA, 18018 [7182441]			
Mrs. Karen Quorum, 1536 Star Stella Dr, Odenton, MD, 21113 [7182440]			

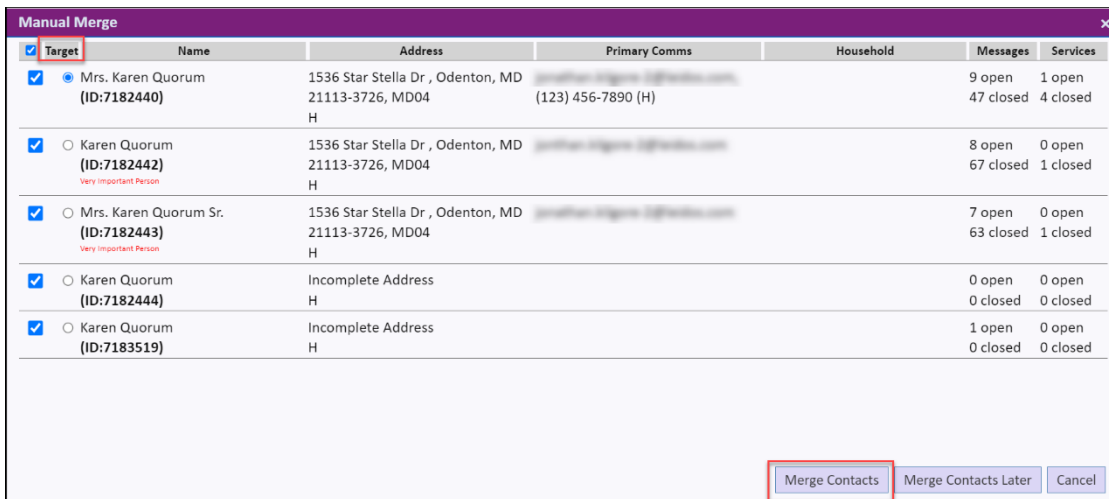
2. If duplicates are found, **check the boxes** next to each duplicate you would like to Merge. Then **Click Change → Merge Contacts**.



Quick Actions: Add/Remove Affiliations, Add/Remove Agency Codes, Add/Remove Agency Categories, Merge Contacts, Update Contact Field, Household, Update Record Security, Configure Personal Tags

Name	Activity	Communication
Mr. [Name]	Messages: Open: 9 Closed: 47 Services: Open: 1 Closed: 4	Email: [Redacted] Home: (123) 456-7890
Mr. [Name]	Messages: Open: 0 Closed: 0 Services: Open: 0 Closed: 0	Do Not Call
Karen Quorum 1536 Star Stella Dr Odenton, MD 21113-3726	Messages: Open: 8 Closed: 67 Services: Open: 0 Closed: 1	Email: [Redacted] Very Important Person

3. IQ displays the **Manual Merge** dialogue. Choose the **Target** contact record (which will be the Contact that all the others will be merged into) and click **Merge Contacts**.



Target	Name	Address	Primary Comms	Household	Messages	Services
<input checked="" type="checkbox"/>	Mrs. Karen Quorum (ID:7182440)	1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 H	(123) 456-7890 (H)		9 open 47 closed	1 open 4 closed
<input type="checkbox"/>	Karen Quorum (ID:7182442) <small>Very Important Person</small>	1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 H			8 open 67 closed	0 open 1 closed
<input type="checkbox"/>	Mrs. Karen Quorum Sr. (ID:7182443) <small>Very Important Person</small>	1536 Star Stella Dr, Odenton, MD 21113-3726, MD04 H			7 open 63 closed	0 open 1 closed
<input type="checkbox"/>	Karen Quorum (ID:7182444)	Incomplete Address H			0 open 0 closed	0 open 0 closed
<input type="checkbox"/>	Karen Quorum (ID:7183519)	Incomplete Address H			1 open 0 closed	0 open 0 closed

Buttons: Merge Contacts, Merge Contacts Later, Cancel

4. The Contacts are now **Merged**.

Note: You may need to “clean up” the merged contact record as any address/contact information from the other records will stack on what already exists. Therefore, you will want to delete repeated addresses, emails, etc.