

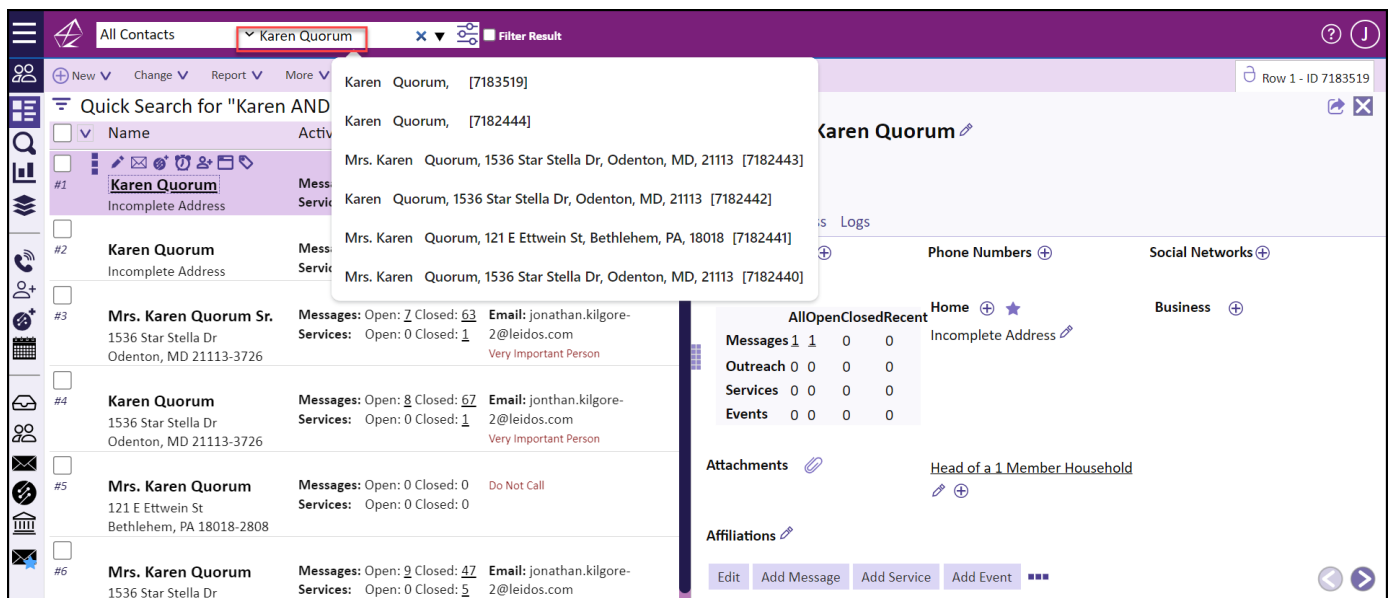
Merging Duplicate Contact Records in IQ5

Market: House, Senate

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

Merging Duplicate Records

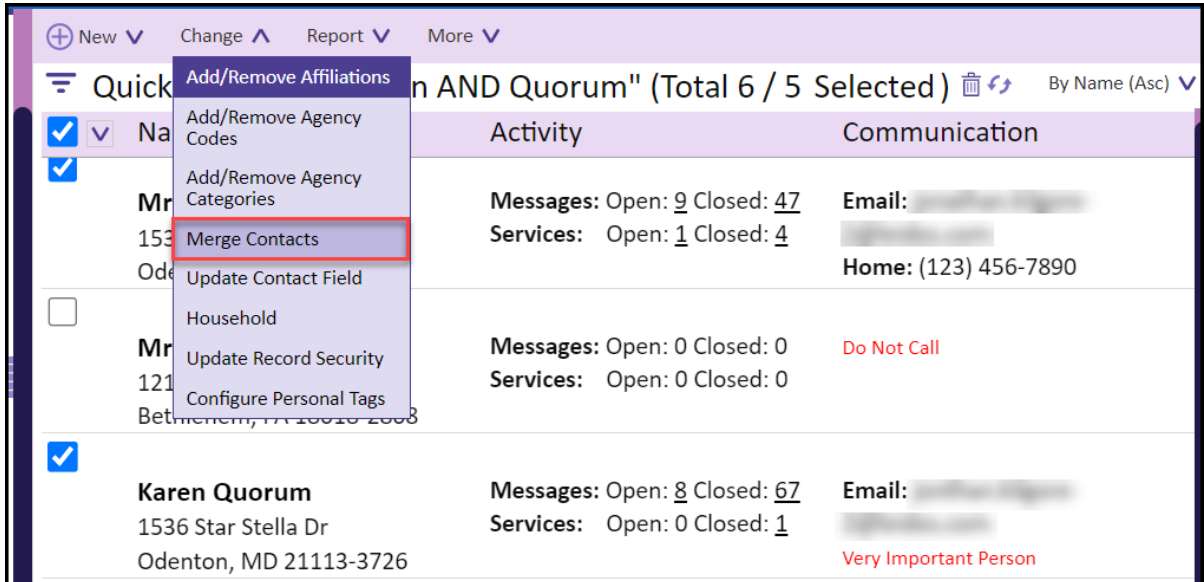
1. Navigate to the **Contacts** application and select a **View** to search from. When looking for Duplicates, it's recommended to search using one of the **Views** in the **Directory** such as **All Contacts**. Enter the name of the contact in the search bar.



The screenshot shows the 'All Contacts' view in the Intranet Quorum application. A search bar at the top contains 'Karen Quorum'. A dropdown menu is open, displaying search results for 'Karen AND'. The results list several entries, each with a checkbox for selection. The main contact record for 'Karen Quorum' is displayed on the right, showing details such as address, messages, services, and affiliations.

#	Name	Address	Phone	Messages	Services	Notes
#1	Karen Quorum	Incomplete Address				
#2	Karen Quorum	Incomplete Address				
#3	Mrs. Karen Quorum Sr.	1536 Star Stella Dr Odenton, MD 21113-3726		Open: 2, Closed: 63	Open: 0, Closed: 1	Email: jonathan.kilgore-2@leidos.com Very Important Person
#4	Karen Quorum	1536 Star Stella Dr Odenton, MD 21113-3726		Open: 8, Closed: 67	Open: 0, Closed: 1	Email: jonathan.kilgore-2@leidos.com Very Important Person
#5	Mrs. Karen Quorum	121 E Ettwein St Bethlehem, PA 18018-2808		Open: 0, Closed: 0	Open: 0, Closed: 0	Do Not Call
#6	Mrs. Karen Quorum	1536 Star Stella Dr		Open: 9, Closed: 47	Open: 0, Closed: 5	Email: jonathan.kilgore-2@leidos.com

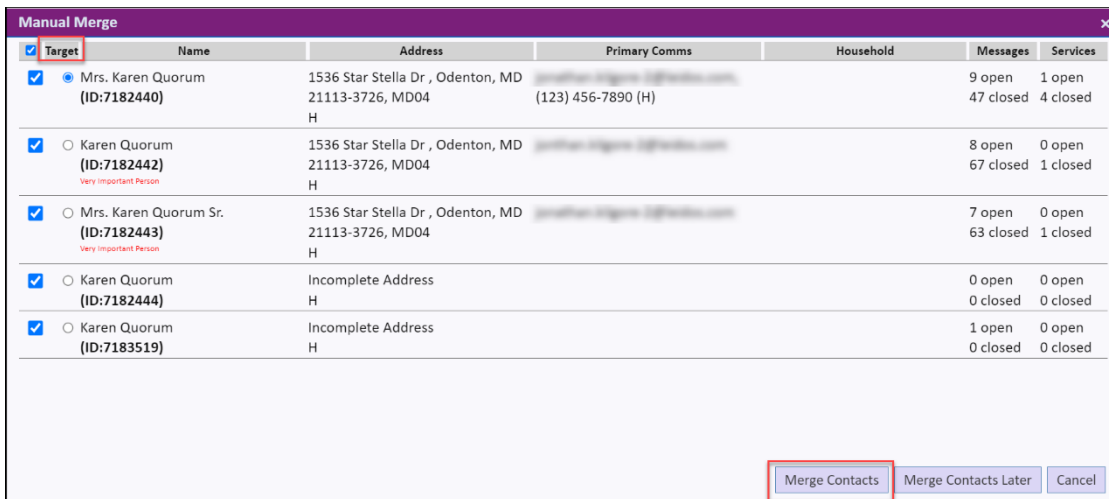
2. If duplicates are found, **check the boxes** next to each duplicate you would like to Merge. Then **Click Change → Merge Contacts**.



The screenshot shows the Intranet Quorum interface with a contact list. A dropdown menu is open over the list, and the 'Merge Contacts' option is highlighted with a red box. The contact list includes details for Karen Quorum and other contacts.

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	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**.



The 'Manual Merge' dialog box shows a list of contacts. The first contact, Mrs. Karen Quorum (ID: 7182440), is selected as the 'Target' and is highlighted with a red box. Other contacts are listed with their respective message and service counts. The 'Merge Contacts' button is also highlighted with a red box.

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)	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)	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

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.