

Updating Multiple Contact Records

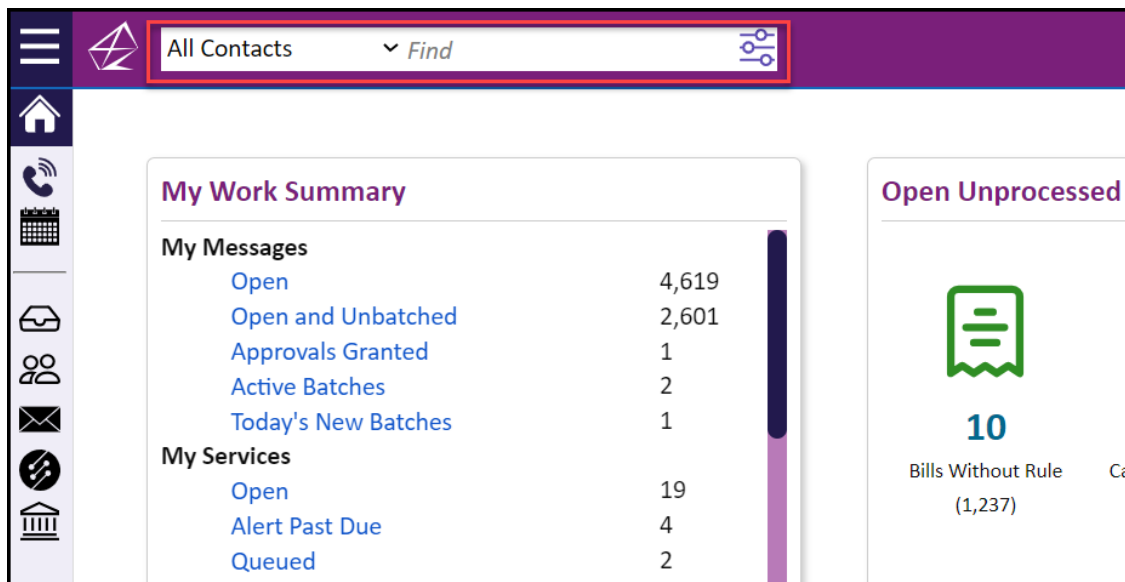
Market: House, Senate

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.



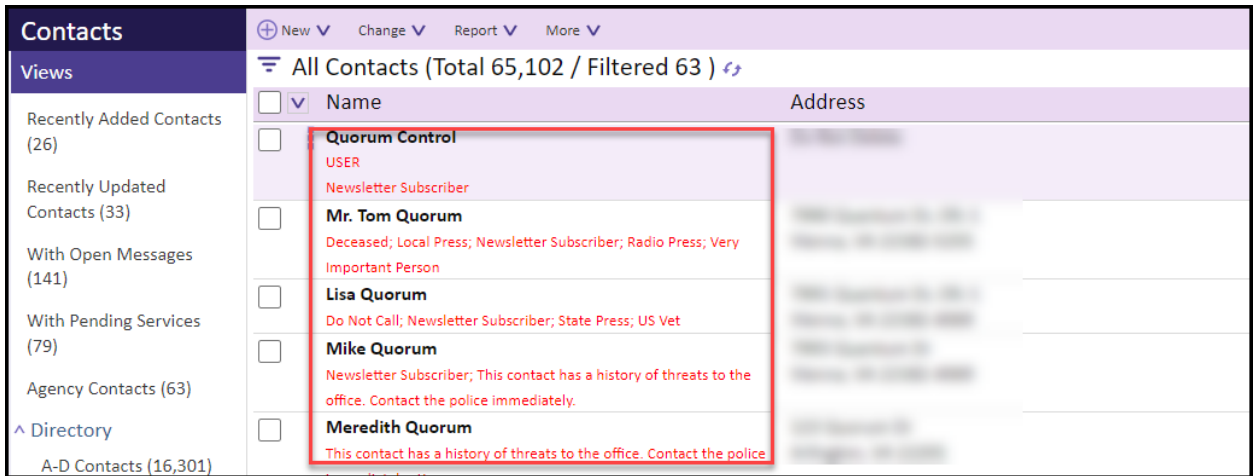
The screenshot shows the Intranet Quorum interface. At the top, there is a search bar with the text "All Contacts" and a dropdown menu labeled "Find". Below the search bar, the interface is divided into two main sections: "My Work Summary" and "Open Unprocessed".

My Work Summary

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

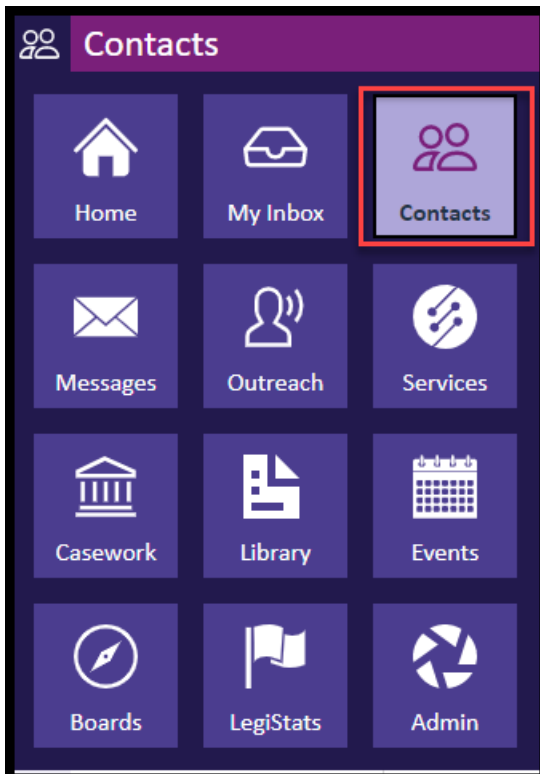
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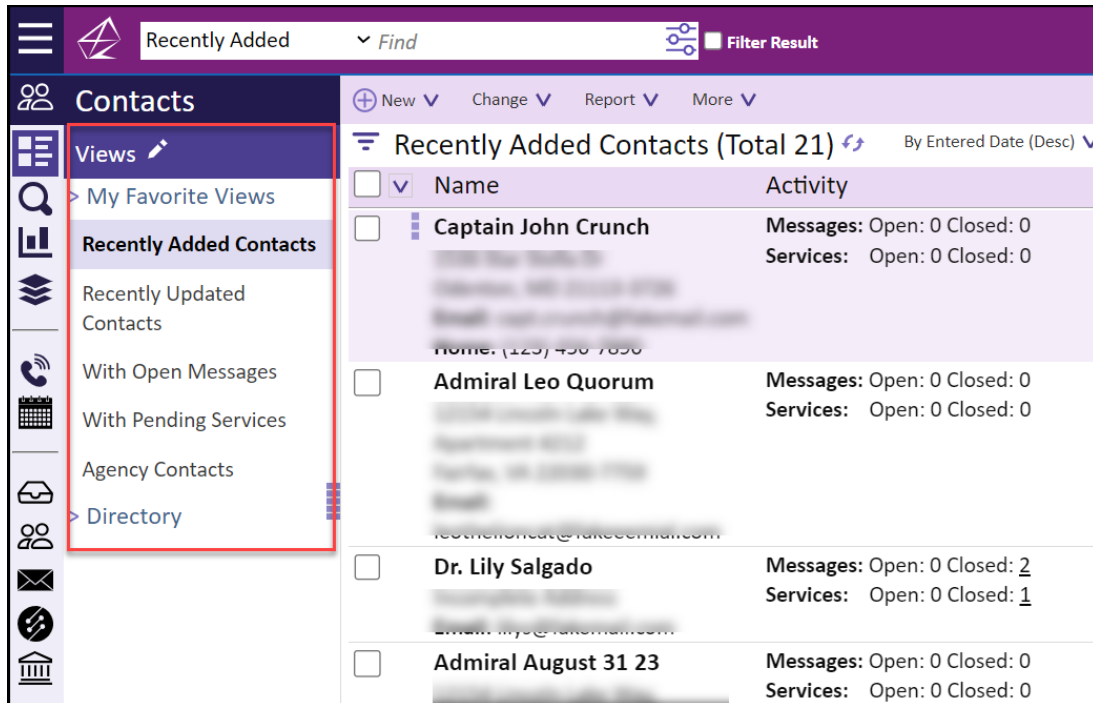
2. Go to [Selecting Multiple Records](#).

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... Arlington, VA 22204	Messages: Open: <u>30</u> Closed: <u>226</u> Services: Open: 0 Closed: <u>33</u>	
<input checked="" type="checkbox"/>	Jenifer Quorum	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	Messages: Open: <u>3</u> Closed: <u>1</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