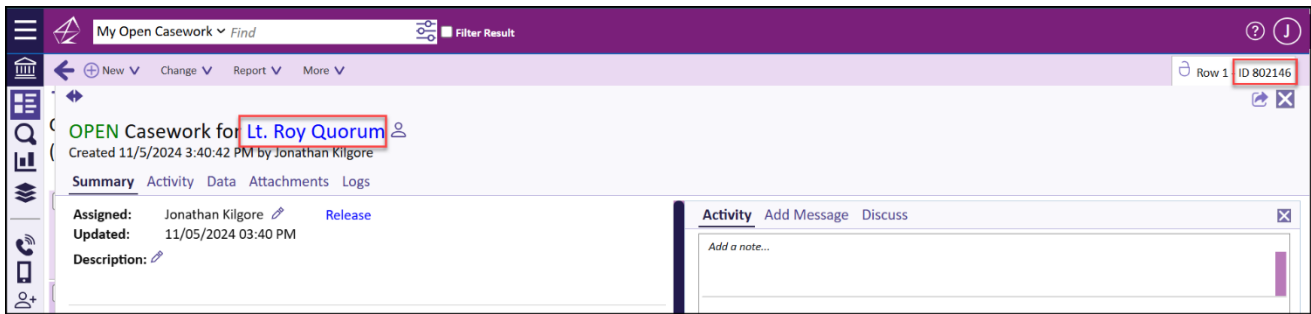


Merging Service Records

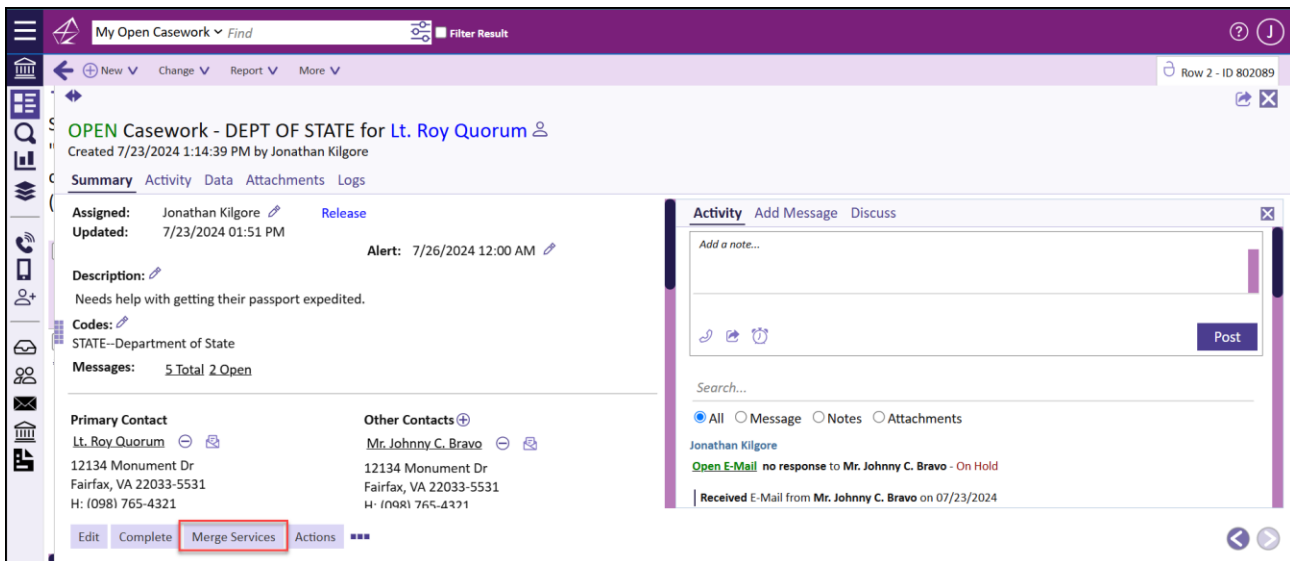
Market: House, Senate

Description: This guide provides instructions on how to merge active service records in cases of duplicate records.

1. Navigate to **Services** → **My Open Services** view.
2. The results display all active services assigned to you. Select the duplicate service record that you want to delete or close.
3. Note the ID# and/or name of the Primary Contact of the duplicate record.



4. Navigate to the other record that will remain open.
5. Select the **Merge Services** button within the Service.



6. In the Merge Services window, enter the ID# or Primary Contact in the Open Services field. IQ will automatically search for that record and display the results.

Merge Services [X]

Merge Services

Open Services

801873

Jane Quorum(Primary) (ID:801873)
4528 Shirley Gate Rd , Fairfax, VA 22030-5524
jane.quorum@fakemail.com, (703) 994-0480 (C)
Type: Casework
Codes: U.S. Citizenship and Immigration Services USCIS

Delete Merged Service

Closed Status Code...

< >

ID#801873
Row 2

Close

7. Choose to either Delete Merged Service or close the service and select the appropriate *Closed Status Code*.

Merge Services [X]

Merge Services

Open Services

Lt. Roy Quorum(Primary) (ID:802146)

Delete Merged Service

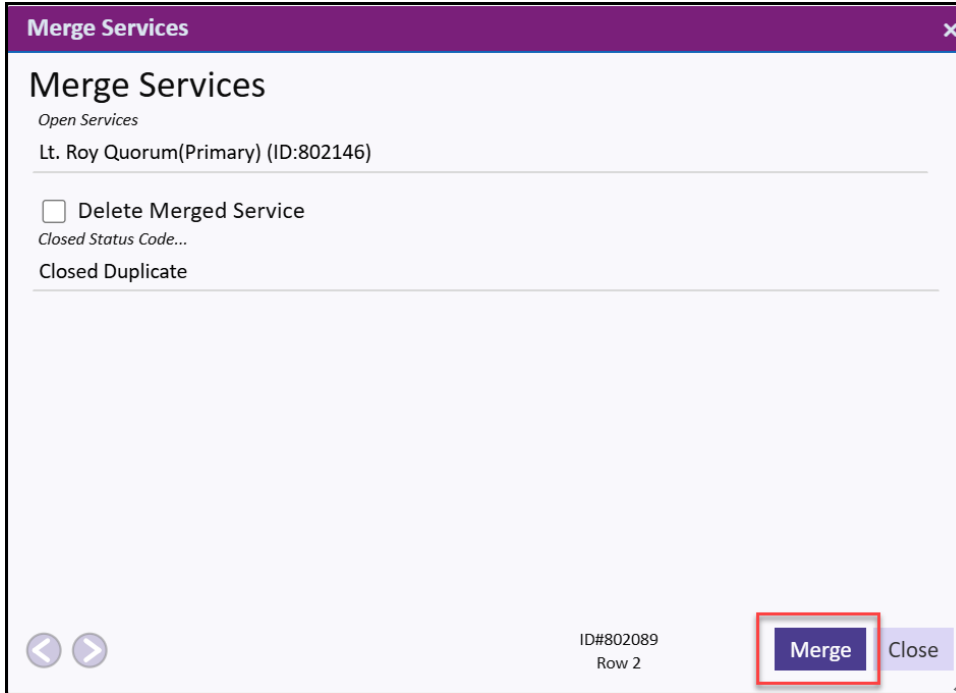
Closed Status Code...


< >

ID#802089
Row 2

Close

8. Click the **Merge** button.



9. In the service record that remains open, the **Activity Tab** will list the merge action, as well as the **Summary Report** of Merged Workflow (this will be an attachment indicated with ).

