## **Merging Duplicate Contact Records**

Market: Federal/State/Local, House, Senate

**Description:** These instructions teach users how to merge duplicate contact records and how to add other contact records into the same household account.

## Merging Duplicate Records

- 1. Navigate to Contacts > Find Contacts > Find or Add a Contact.
- **2.** Enter the name of the contact. In the search results, double-click the contact record you want to review for possible duplicate records.

Find Contact	Contacts » New	
John Quorum	Find or Add a Contact (2 Results) G	
Email	Add Contact Change 🛇 New 🛇 More 🛇 Sort: Relevance (Desc) 🛇	۲
Phone Number	+Message +Default Service +Service +Attachment +Opinion +Household +Organization +Affiliation Delete	(ID# 7183098) 1
Title	Ourran, John     Outreach: (Open: 0 Completed: 1)     Outreach: (Open: 0 Completed: 0)	Agency Contact for Service Code(s); ACAD AF - United States Air Force Academy
Organization	Vienna, Virginia 22182-5255 VA11	
Organization2	Home: (703) 698-1234	
Street Address	+Message +Default Service +Service +Attachment +Opinion +Household +Organization +Affiliation Delete	∎ (ID# 7118163) 2
Street Address2	Assistant Manager Assistant Ma	Member Of: 911 Board Newsletter Subscriber Frequent Writer IQ-Identified
City	Target 7994 Quantum Dr Vienna, Vienna 22182-4066 VA11	Young person US Vet Engagement Med
State	Business: (704) 000-0000 ∭ training@iqhelpdesk.com	

## 3. Click Actions. Select Duplicate Check.

Contacts » New » Contact John Quorum Agency Contact for Service Code(s): ACAD AF - United States Air Force Academy Birthdate: 9/8/1965 Age: 56 New Default Service New Service New Tours Attach Existing Event							
General Messages (1)	Outreach (0)	Services (4)	Events (0)	Boards (0)	Voter Data	Log (27)	New Form Message
Home Address + * Busir 7990 Quantum Dr Retire Vienna, VA 22182-5255 7990		l <b>dress +</b> m Drive	<b>Onlin</b> ⊠ jo	n <b>e Info +</b> quorum@gmail.co	om * 🗸	<b>Phone Numb</b> H: (703) 698-1	Duplicate Check Summary Report by Section Delete
VA11 Fairfax County Map	Vienna, VA 22 County <u>Map</u> <b>Q</b>	2182 Virginia					Discussion

4. IQ displays the Merge Potential Duplicates box.

Select Records for Merging									
J     #     Target     Name     Address     Type     Household									
	1	0	Mr. John L. Quorum (No Primary Email)	LMDSI 2700 Prosperity Avenue Fairfax, VA 22031-4339	В		10 pending 17 closed	3 open 1 completed	
	2	0	Mr. John L. Quorum (No Primary Email)	LMDSI 2700 Prosperity Avenue Fairfax, VA 22031-4339	В		15 pending 18 closed	5 open 0 completed	
	3	0	Mr. John L. Quorum (lysa.johnson@lmco.com)	Lockheed Martin Corp 2701 Prosperity Avenue Fairfax, VA 22031-4362	B (1 of 3)		22 pending 48 closed	4 open 1 completed	
	4	۲	Mr. John Quorum (todd.l.cox@lmco.com)	2700 Prosperity Avenue Fairfax, VA 22031-4339	H (1 of 2)	Ms. Anne M. Quorum Ph.D Quorum	12 pending 15 closed	5 open 1 completed	
				Morgo Morgo Lato	Cancel				

- **5.** Under **Target**, click the button for the record that is most complete or accurate and into which all the other contact records will merge.
- **6.** Click the check boxes of the contact records (including the Target) that you wish to merge into the Target record.
- 7. Click Merge.

## **Adding Household Contacts**

- 1. Navigate to Contacts > Find Contacts > Find or Add a Contact.
- **2.** Enter the name of the contact. In the search results, select the row of the contact record and click **+ Household**.

Find Contact	Contacts » New	
John Quorum	Find or Add a Contact (2 Results) 6	
Email	Add Contact Change 🛇 New 🛇 More 🛇 Sort: Relevance (Desc) 🛇	۲
Phone Number	+Message +Default Service +Service +Attachment +Opinion +Household Organization +Affiliation Delete	(ID# 7183098) 1
Title	Ourum, John     Messages: (Open: 0 Completed: 1)     Outreach: (Open: 0 Completed: 0)	Agency Contact for Service Code(s): ACAD AF - United States Air Force Academy
Organization	7990 Quantum Dr Vienna, Virginia 22182-5255 VA11 Vienna, Virginia 22182-5255 VA11	
Organization2	Home: (703) 698-1234	
Street Address	+Message +Default Service +Service +Attachment +Opinion +Household +Organization +Affiliation Delete	(ID# 7118163) 2
Street Address2	Assistant Manager (Open: 14 Completed: 29) Assistant Manager (Open: 14 Completed: 2) Completed: 21	Member Of: 911 Board Newsletter Subscriber Frequent Writer IO-Identified
City	Target 7994 Quantum Dr	Young person US Vet Engagement Med
State	Vienne, Virgina 22162-4005 VA11 Business: (704) 000-0000 W training@liqhelpdesk.com	

Page **2** of **3** Leidos proprietary 2025-This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos. **3.** A new window appears. Enter the name of an IQ contact record that will be included as a household record of the active contact record and click the button shown below.

Add Person to Household							
Name	LISA QUORUM (ID:7118125)       Add existing Contact to Household	Cancel					

**4.** Each IQ record that has an associated household member will now display their names in the Household member section of their record.

Contacts » Search » Results » Contact Lisa Quorum · Do Not Call, Newsletter Subscriber, State Press, US Vet						Engagement 4 Low	ID# 7	ID# 7118125	
General Messages (11	Outreach (0)	Services (9)	Events (2)	Boards (0)	Voter Data	Log (13)			
Home Address + ★ 7991 Quantum Dr, Ofc 1 ▲ Vienna, VA 22182-4069 VA11 Fairfax County Map ♥	Business A None	ddress +	Online Info + None			Phone Numbers + None		ussion (0)	
Household Members  + All Household Members Lisa Quorum Do hot Cal. Newelter Subscribe, State Press, US Vet John Quorum Agency Contect for Workflow Code(s): ACAD AP - United S Force Academy	Organizati None	on Contacts	Atta D	chments		Affiliations DNC - Do Not Call, Newsletter Subscrit PRESS.STATE - Stal Veteran, AF.VET - A Veteran, TTH.OPTI	EMAIL.OPTIN - per, te Press, VET - hir Force N - TTH.OPTIN	Disc	