

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.



3. Click **Actions**. Select **Duplicate Check**.



4. IQ displays the **Merge Potential Duplicates** box.

Merge Potential Duplicates

Select Records for Merging

✓	#	Target	Name	Address	Type	Household	Mail	Workflow
<input type="checkbox"/>	1	<input type="radio"/>	Mr. John L. Quorum (No Primary Email)	LMDSI 2700 Prosperity Avenue Fairfax, VA 22031-4339	B		10 pending 17 closed	3 open 1 completed
<input type="checkbox"/>	2	<input type="radio"/>	Mr. John L. Quorum (No Primary Email)	LMDSI 2700 Prosperity Avenue Fairfax, VA 22031-4339	B		15 pending 18 closed	5 open 0 completed
<input type="checkbox"/>	3	<input type="radio"/>	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
<input type="checkbox"/>	4	<input checked="" type="radio"/>	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

Please verify that all records are to be merged -- possible mismatches exist in this set.

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**.

The screenshot shows the 'Find Contact' sidebar on the left with 'John Quorum' entered in the search field. The main area displays 'Find or Add a Contact (2 Results)'. The first result is for 'Quorum, John' with a '+ Household' button highlighted in red. The second result is for 'Quorum, Mr. John'.

- 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

- 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 ID# 7118125



Lisa Quorum
Do Not Call, Newsletter Subscriber, State Press, US Vet

Engagement

4

Low

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 Address +

None

Online Info +

None

Phone Numbers +

None

Household Members +

[All Household Members](#)

[Lisa Quorum](#)
Do Not Call, Newsletter Subscriber, State Press, US Vet

[John Quorum](#) *
Agency Contact for Workflow Code(s): ACAD AF - United States Air Force Academy

Organization Contacts

None

Attachments

Affiliations

DNC - Do Not Call, EMAIL.OPTIN - Newsletter Subscriber, PRESS.STATE - State Press, VET - Veteran, AF.VET - Air Force Veteran, TTH.OPTIN - TTH.OPTIN