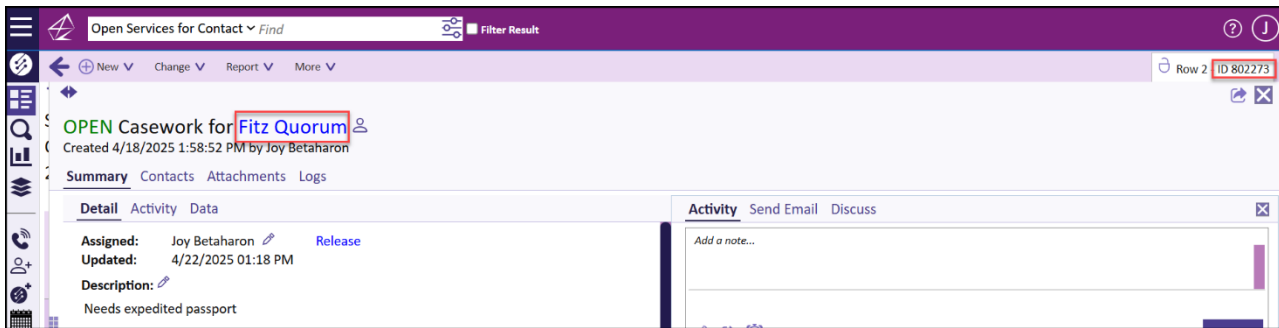


Merging Service Records

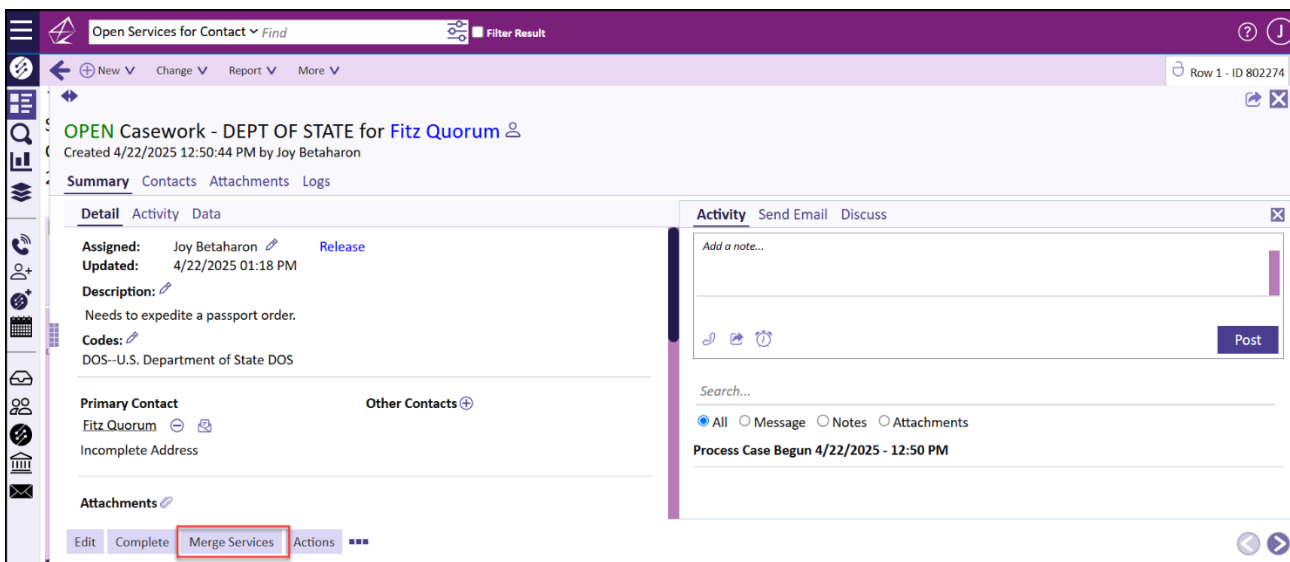
Market: House, Senate

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.

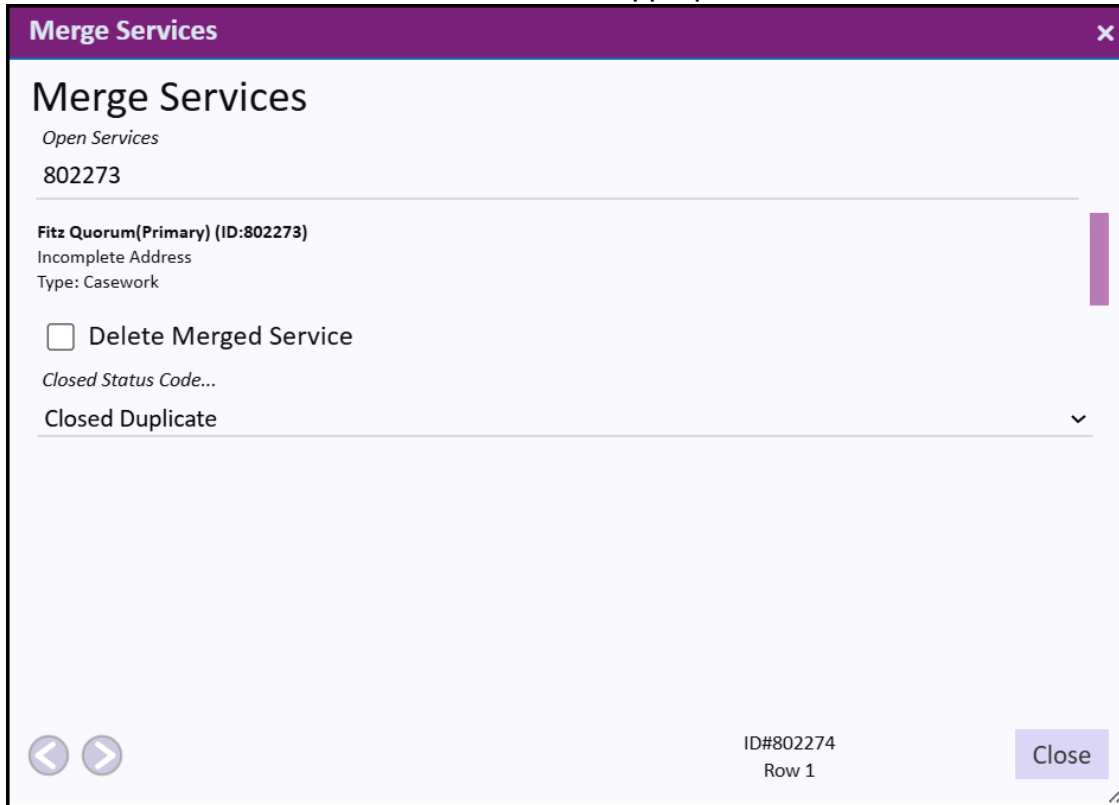


4. Navigate to the other record that will remain open.
5. Select the **Merge Services** button within the Service.

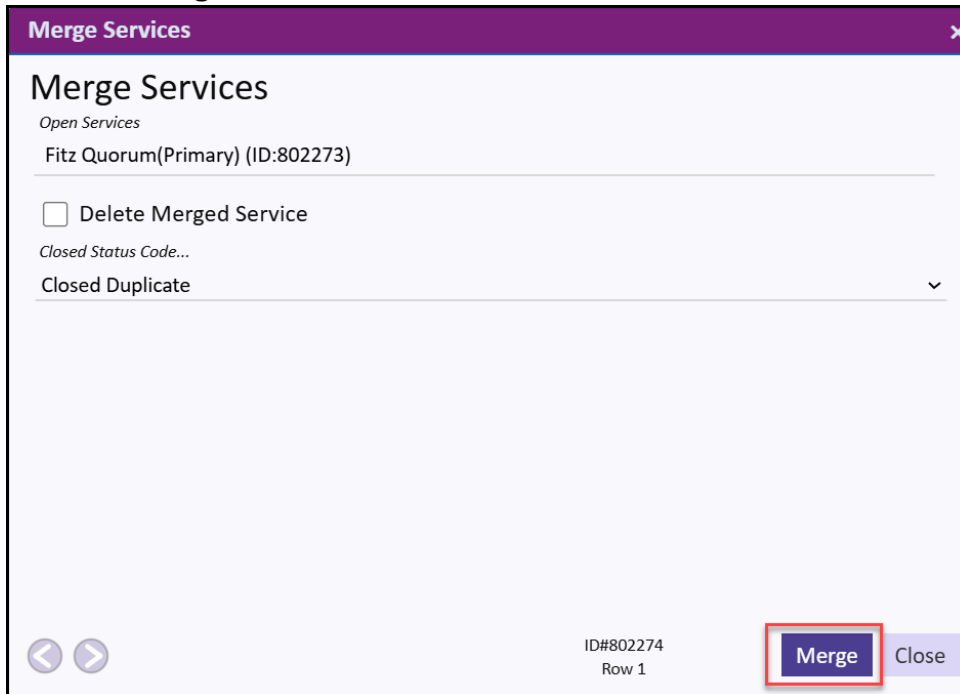



6. In the Merge Services window, enter the ID# or Primary Contact in the Open Services field. IQ will automatically search for that record and display the results. Choose to either Delete Merged

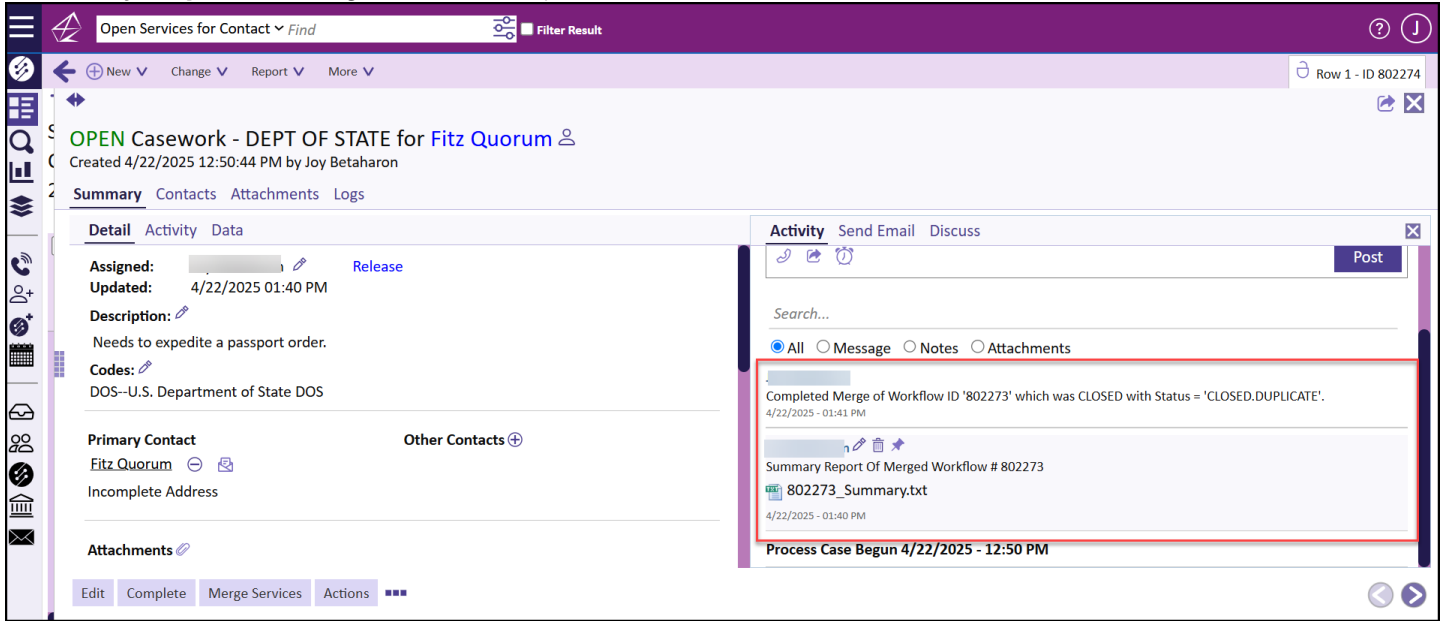
Service or close the service and select the appropriate *Closed Status Code*.



7. Click the **Merge** button.



8. 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 ).



The screenshot displays a web application interface for a service record. The main header shows 'Open Services for Contact' with a search bar and a 'Filter Result' button. Below this, the record is titled 'OPEN Casework - DEPT OF STATE for Fitz Quorum' and was created on 4/22/2025 at 12:50:44 PM by Joy Betaharon. The interface has tabs for 'Summary', 'Contacts', 'Attachments', and 'Logs'. The 'Detail' tab is active, showing fields for 'Assigned', 'Updated' (4/22/2025 01:40 PM), 'Description' (Needs to expedite a passport order), and 'Codes' (DOS--U.S. Department of State DOS). There are sections for 'Primary Contact' (Fitz Quorum) and 'Attachments'. An 'Activity' panel is open on the right, showing a log of events. A red box highlights an activity entry: 'Completed Merge of Workflow ID '802273' which was CLOSED with Status = 'CLOSED.DUPLICATE'. 4/22/2025 - 01:41 PM'. Below this, a summary report attachment is listed: 'Summary Report Of Merged Workflow # 802273' with the file name '802273_Summary.txt' and timestamp '4/22/2025 - 01:40 PM'. The activity panel also shows 'Process Case Begun 4/22/2025 - 12:50 PM'. At the bottom of the interface, there are buttons for 'Edit', 'Complete', 'Merge Services', and 'Actions'.