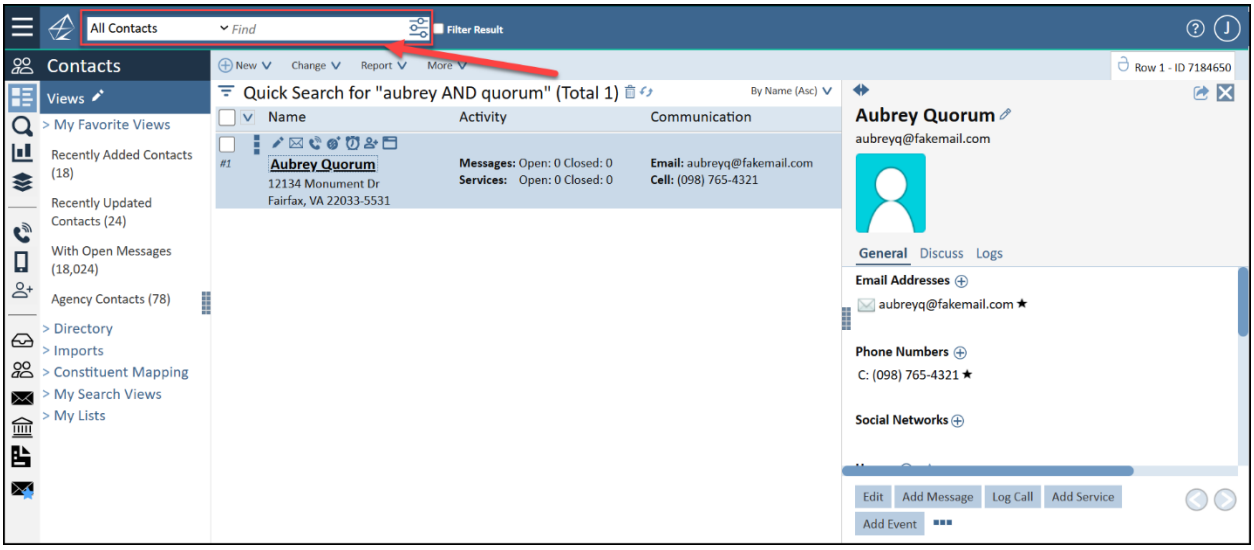
Tagging a Contact in a Discussion

Market: House, Senate

Description: These instructions teach users how to tag other IQ contacts in a discussion. As a result, individuals who are tagged in the discussion will receive an alert notification in IQ and MS Outlook (if configured).

1. Search for the contact using the **Search Bar** at the top of the page to look for the individual across the various **Contact Views.**



2. Click the name of the contact record or the expander icon to get a more full screen view of the Contact. Click on the Views Icon to collapse your list of views for a completely full screen view of the Contact.

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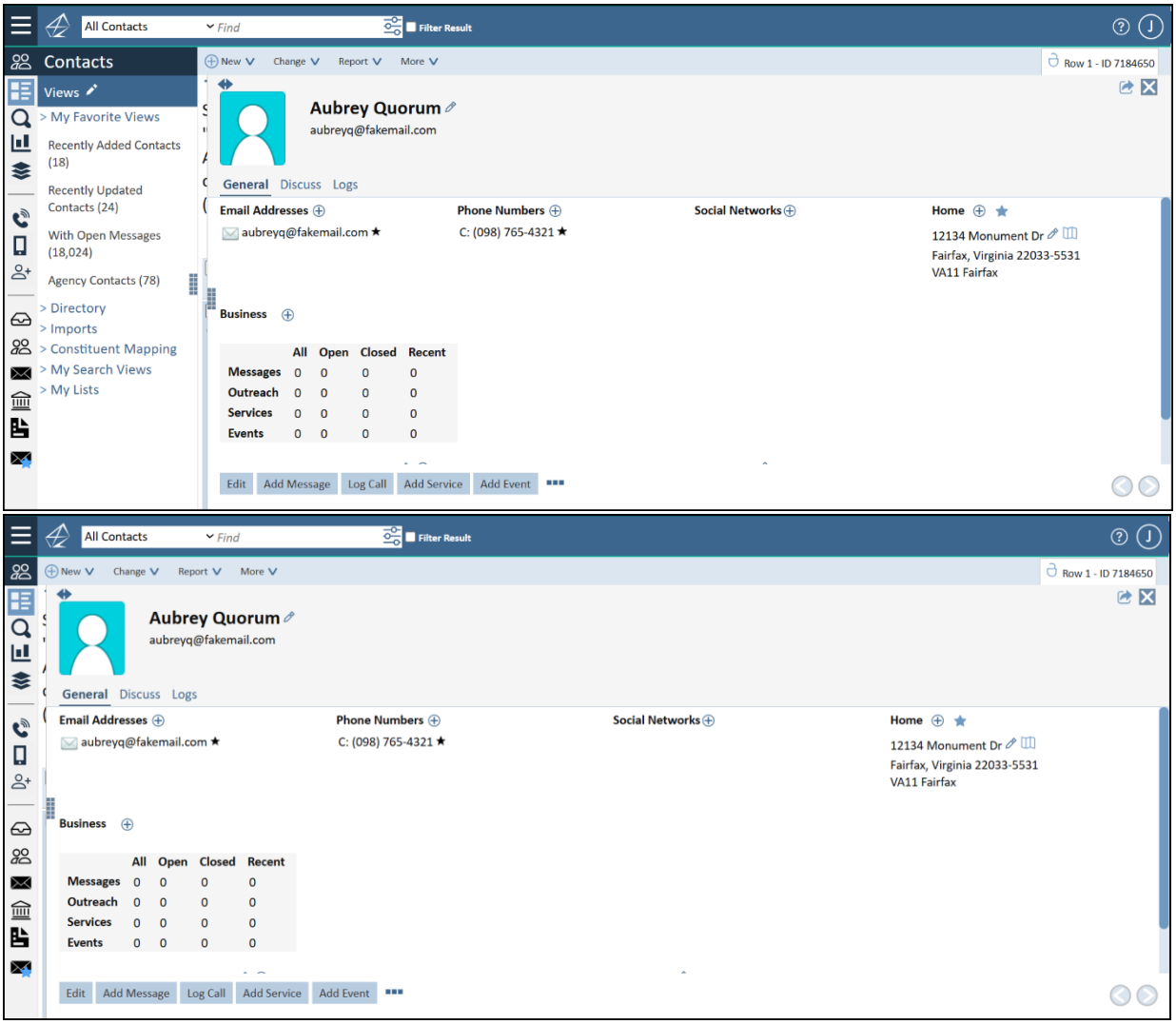

3. Click the **Discuss** tab to open the section.
4. In the **Discuss** section, enter the discussion message. Also enter the name of the other user(s) that you want to include in a discussion about the selected contact. Click **Post**.

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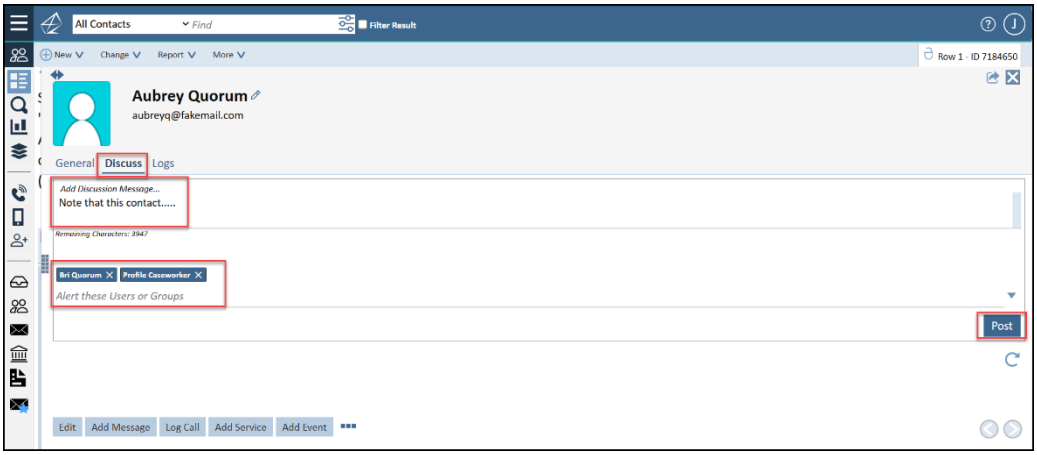
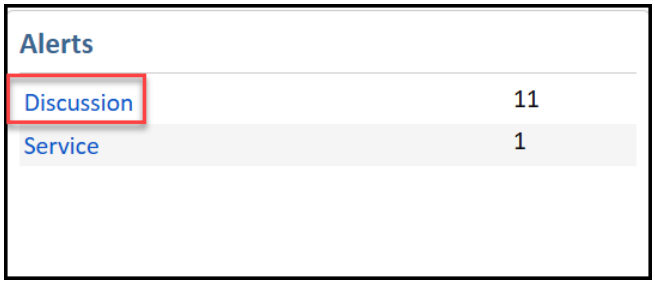


5. The user(s) will receive an alert notification on their homepage tile regarding the discussion in IQ and MS Outlook (if this option is configured in their IQ settings). Alerts can also be found in the **My Inbox** application.

a. Click on the **Discussion** link in the **Alerts** tile. This opens the **My Alerts** view in the **My Inbox** application.



b. Go to **My Inbox** application → **My Alerts**

i. *Note: When viewing an Alert you can click **Mark as Read** to indicate the Alert has been read and remove it from your Alerts Tile. The Alert will automatically be marked as read after three seconds have passed since clicking on it and moving on to another record.

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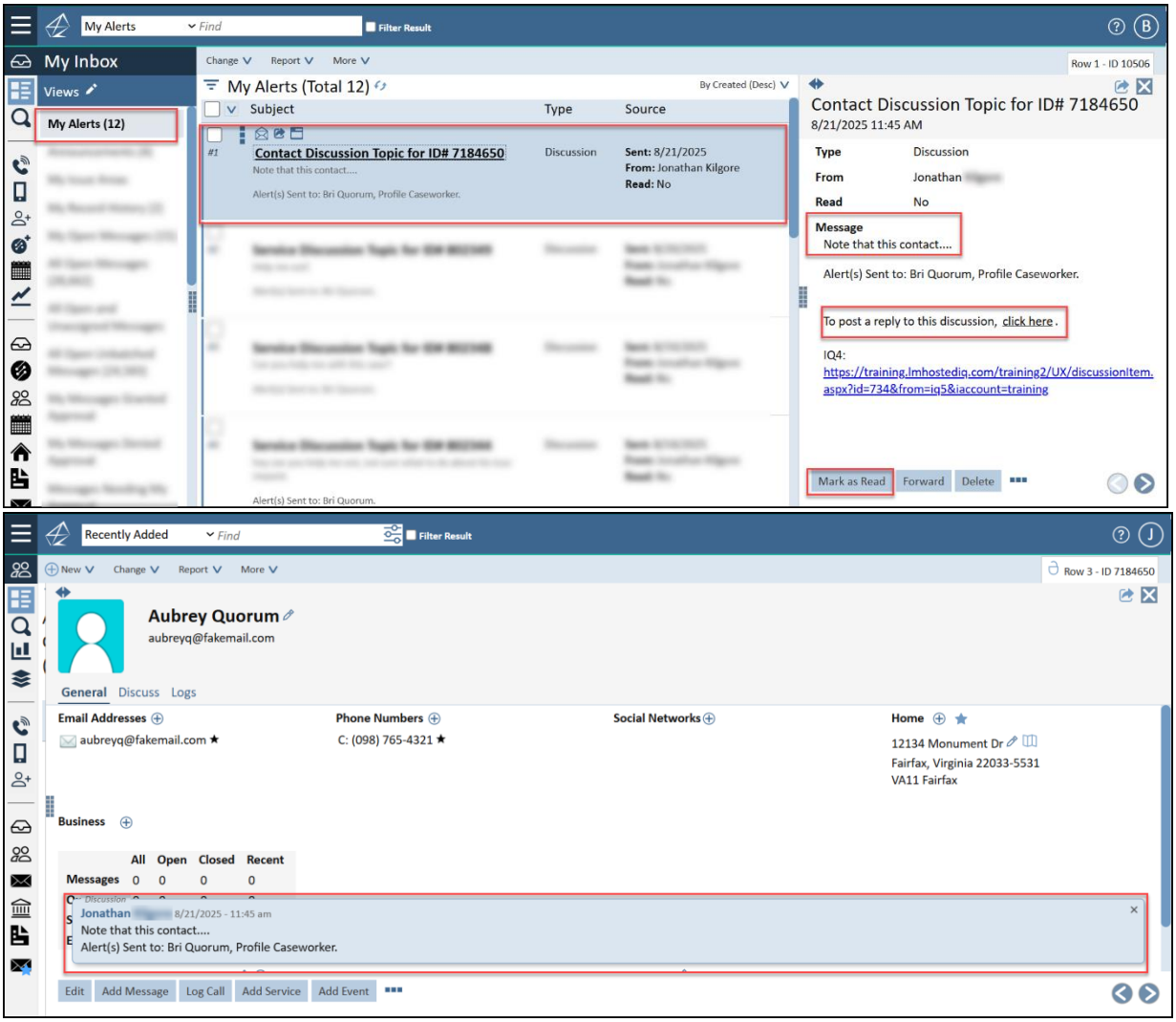

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