

Updating Multiple Contact Records

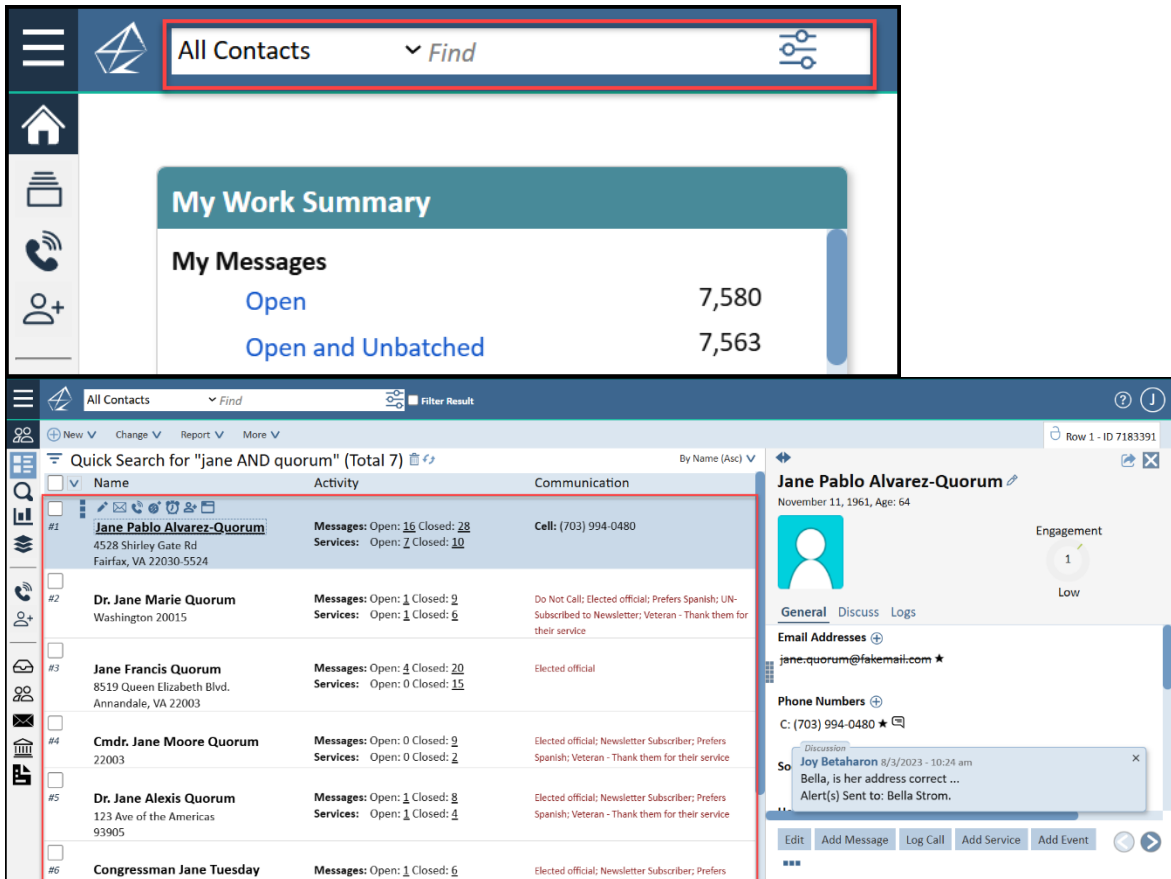
Market: House, Senate

Description: These instructions teach users how to modify information for multiple contact records.

Search for Contact Records

Option 1: Search for contact records via Contact Search

1. Search for records in the contacts search bar by typing in either a First and/or Last Name, Email, Phone Number, Organization, or IQ Contact ID#. Results will display in the Contacts application.



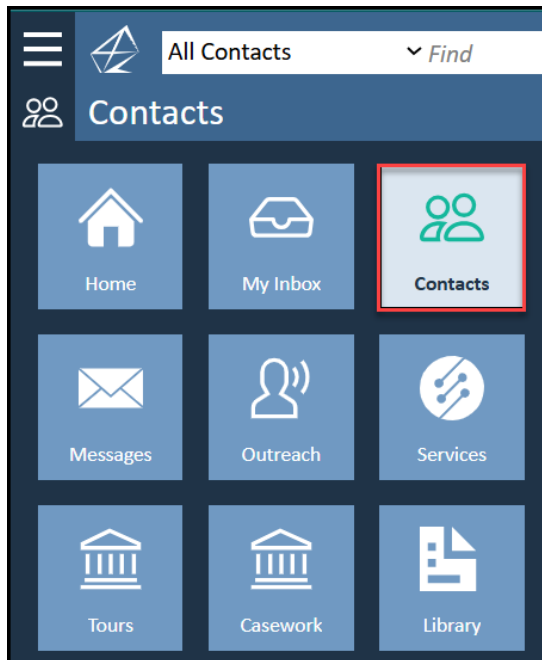
The screenshot displays the Intranet Quorum interface. At the top, a search bar is highlighted with a red box, containing the text "All Contacts" and a "Find" button. Below the search bar, a "My Work Summary" section shows "My Messages" with "Open" at 7,580 and "Open and Unbatched" at 7,563. The main content area shows a list of search results for "jane AND quorum" (Total 7). The results are displayed in a table with columns for Name, Activity, and Communication. The first result, "Jane Pablo Alvarez-Quorum", is highlighted with a red box. To the right of the table, a detailed view of the selected contact is shown, including a profile picture, name, date of birth, age, engagement level, and contact information (email and phone numbers). A discussion bubble is also visible at the bottom right of the contact details.

#	Name	Activity	Communication
#1	Jane Pablo Alvarez-Quorum 4528 Shirley Gate Rd Fairfax, VA 22030-5524	Messages: Open: 16 Closed: 28 Services: Open: 7 Closed: 10	Cell: (703) 994-0480
#2	Dr. Jane Marie Quorum Washington 20015	Messages: Open: 1 Closed: 2 Services: Open: 1 Closed: 6	Do Not Call; Elected official; Prefers Spanish; UN-Subscribed to Newsletter; Veteran - Thank them for their service
#3	Jane Francis Quorum 8519 Queen Elizabeth Blvd. Annandale, VA 22003	Messages: Open: 4 Closed: 20 Services: Open: 0 Closed: 15	Elected official
#4	Cmdr. Jane Moore Quorum 22003	Messages: Open: 0 Closed: 9 Services: Open: 0 Closed: 4	Elected official; Newsletter Subscriber; Prefers Spanish; Veteran - Thank them for their service
#5	Dr. Jane Alexis Quorum 123 Ave of the Americas 93905	Messages: Open: 1 Closed: 8 Services: Open: 1 Closed: 4	Elected official; Newsletter Subscriber; Prefers Spanish; Veteran - Thank them for their service
#6	Congressman Jane Tuesday	Messages: Open: 1 Closed: 6	Elected official; Newsletter Subscriber; Prefers

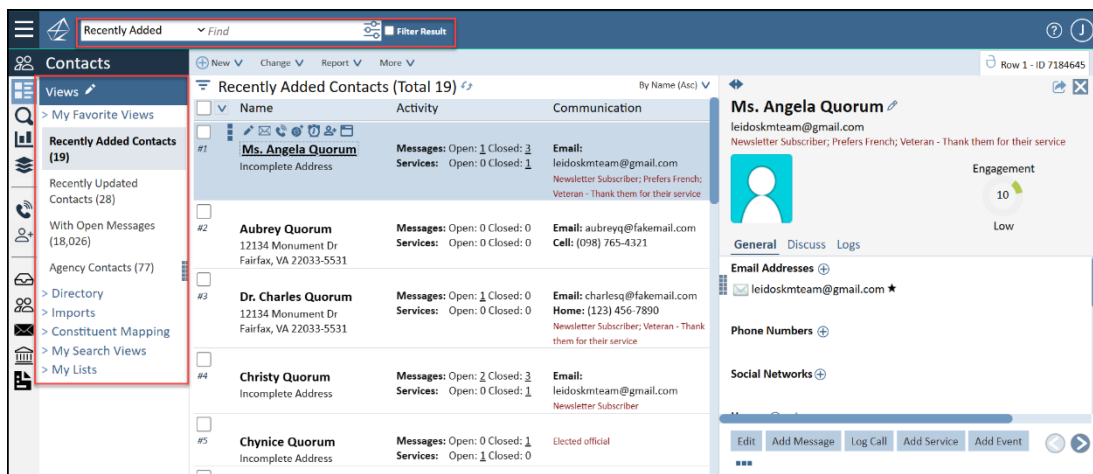
2. Go to [Selecting Multiple Records](#).

Option 2: Search for contact records via Contact Views

1. From the IQ Feature Menu, select the **Contacts** application.




2. Use the Views/search bar to search for records.



3. Go to [Selecting Multiple Records](#)

Selecting Multiple Records

1. Select the set of records to update by checking in the  to the left of the name.

New Change Report More			
Recently Added Contacts (Total 19 / 19 Selected)			By Name (Asc)
<input checked="" type="checkbox"/>	Name	Activity	Communication
<input checked="" type="checkbox"/>	#1 Ms. Angela Quorum Incomplete Address	Messages: Open: 1 Closed: 3 Services: Open: 0 Closed: 1	Email: leidoskmtteam@gmail.com Newsletter Subscriber; Prefers French; Veteran - Thank them for their service
<input checked="" type="checkbox"/>	#2 Aubrey Quorum 12134 Monument Dr Fairfax, VA 22033-5531	Messages: Open: 0 Closed: 0 Services: Open: 0 Closed: 0	Email: aubreyq@fakemail.com Cell: (098) 765-4321
<input checked="" type="checkbox"/>	#3 Dr. Charles Quorum 12134 Monument Dr Fairfax, VA 22033-5531	Messages: Open: 1 Closed: 0 Services: Open: 0 Closed: 0	Email: charlesq@fakemail.com Home: (123) 456-7890 Newsletter Subscriber; Veteran - Thank them for their service
<input checked="" type="checkbox"/>	#4 Christy Quorum Incomplete Address	Messages: Open: 2 Closed: 3 Services: Open: 0 Closed: 1	Email: leidoskmtteam@gmail.com Newsletter Subscriber
<input checked="" type="checkbox"/>	#5 Chynice Quorum Incomplete Address	Messages: Open: 0 Closed: 1 Services: Open: 1 Closed: 0	Elected official

2. Click **Change**. Select the attribute or action that you want to apply to all the selected records.



⊕ New ▾ **Change** ▲ Report ▾ More ▾

☰ Recent **Change** ▲

- Add/Remove Affiliations
- Add/Remove Agency Codes
- Add/Remove Agency Categories
- Merge Contacts
- Update Contact Field
- Household
- Update Record Security
- Configure Personal Tags

✓ ▾ Na

✓ #1 Ms Inco

✓ #2 Au 1215 ... Fairfax, VA 22033-5531

Contacts (Total 19 / 19 Selected)

Activity
Messages: Open: <u>1</u> Closed: <u>3</u>
Services: Open: 0 Closed: <u>1</u>
Messages: Open: 0 Closed: 0
Services: Open: 0 Closed: 0