

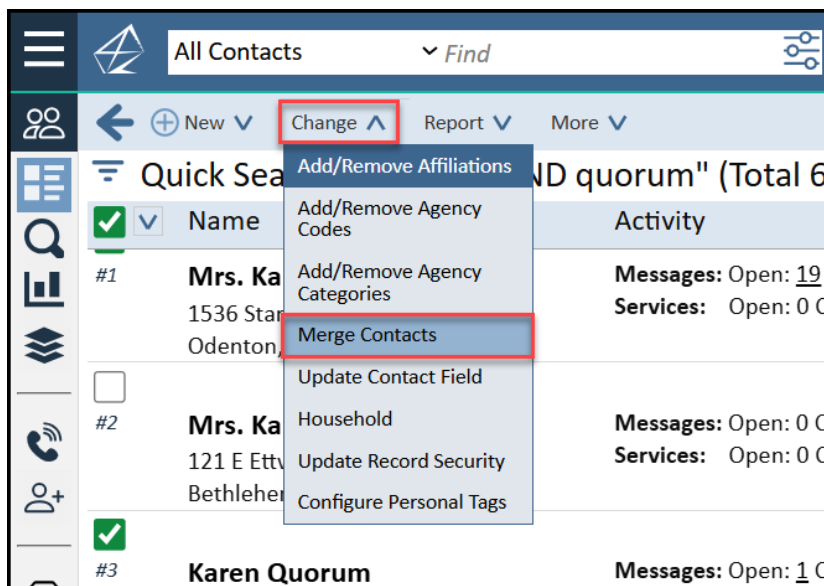
Merging Duplicate Contact Records in IQ5

Market: House, Senate

Description: These instructions teach users how to merge duplicate contact records.

Merging Duplicate Records

1. Navigate to the **Contacts** application and select a **View** to search from. When looking for Duplicates, it's recommended to search using one of the **Views** in the **Directory** such as **All Contacts**. Enter the name of the contact in the search bar.
2. If duplicates are found, **check the boxes** next to each duplicate you would like to Merge. Then **Click Change → Merge Contacts**.



3. IQ displays the **Manual Merge** dialogue. Choose the **Target** contact record (which will be the Contact that all the others will be merged into) and click **Merge Contacts**.

Manual Merge

<input checked="" type="checkbox"/> Target	Name	Address	Primary Comms	Household	Messages	Services
<input checked="" type="checkbox"/>	Mrs. Karen Quorum (ID:7182440)	1536 Star Stella Dr., Odenton, MD 21113-3726, MD04 H	jonathan.kilgore-2@leidos.com, (123) 456-7890 (H)		22 open 47 closed	0 open 5 closed
<input checked="" type="checkbox"/>	<input type="radio"/> Karen Quorum (ID:7182442) <small>Very Important Person</small>	1536 Star Stella Dr., Odenton, MD 21113-3726, MD04 H			11 open 70 closed	0 open 1 closed
<input checked="" type="checkbox"/>	<input type="radio"/> Mrs. Karen Quorum Sr. (ID:7182443) <small>Very Important Person</small>	1536 Star Stella Dr., Odenton, MD 21113-3726, MD04 H	jonathan.kilgore-2@leidos.com		15 open 63 closed	0 open 1 closed
<input checked="" type="checkbox"/>	<input type="radio"/> Karen Quorum (ID:7182444)	Incomplete Address H			0 open 0 closed	0 open 0 closed
<input checked="" type="checkbox"/>	<input type="radio"/> Karen Quorum (ID:7183519)	Incomplete Address H			2 open 0 closed	0 open 0 closed

Merge Contacts
Merge Contacts Later
Cancel

4. The Contacts are now **Merged**.

Note: You may need to “clean up” the merged contact record as any address/contact information from the other records will stack on what already exists. Therefore, you will want to delete repeated addresses, emails, etc.