

Updating Multiple Contact Records

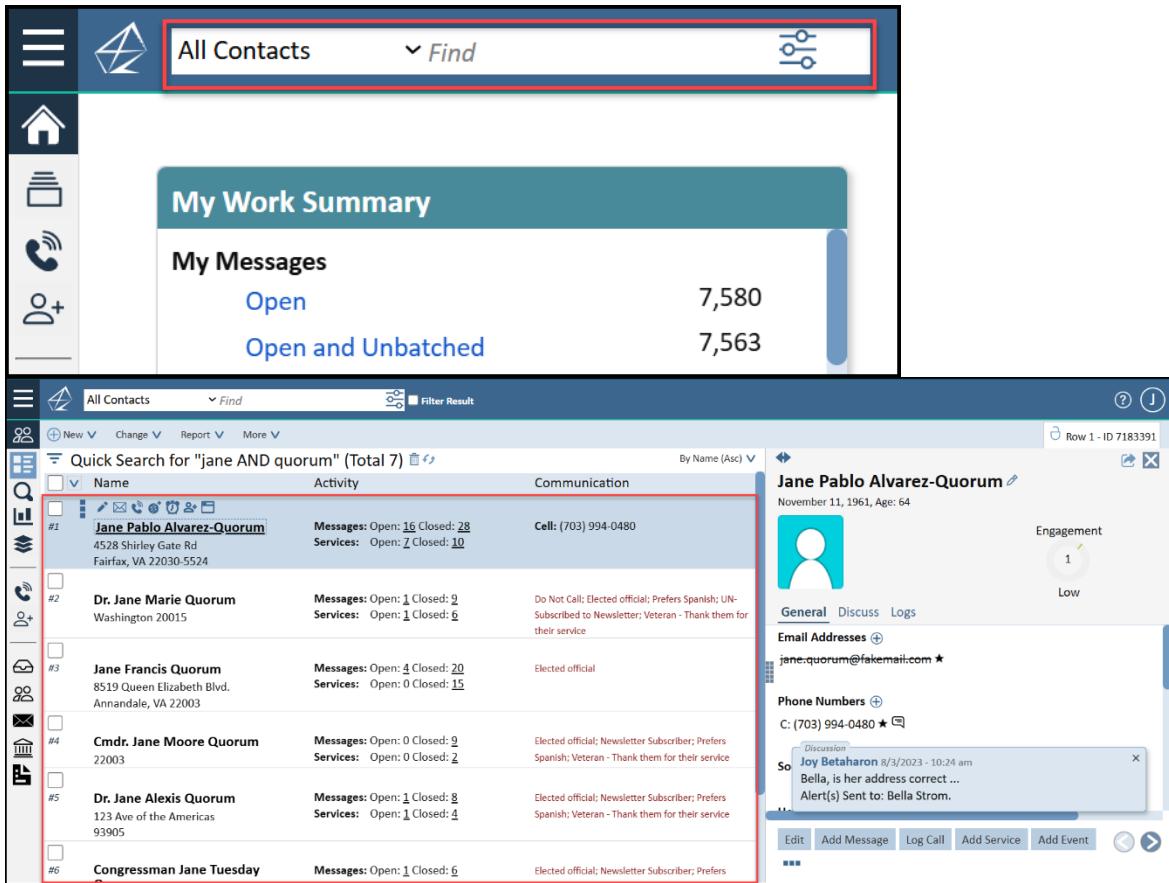
Market: House, Senate

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.

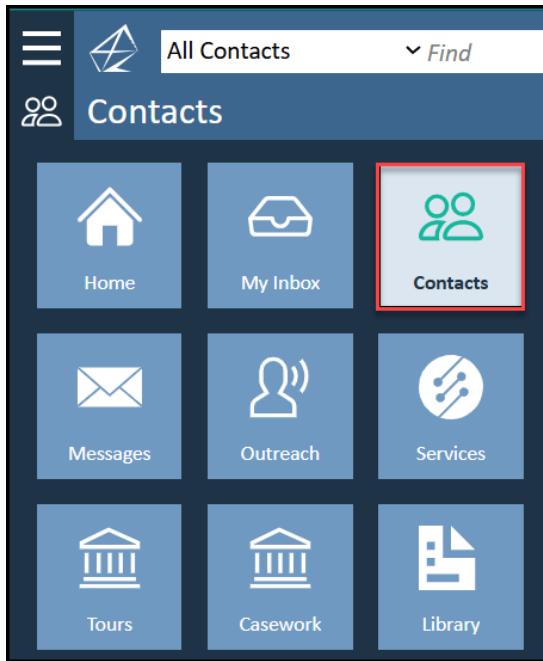


The screenshot shows the Intranet Quorum Contacts application interface. At the top, there is a navigation bar with a menu icon, a home icon, and a search bar labeled 'All Contacts' with a 'Find' button. Below the search bar is a 'My Work Summary' card with sections for 'My Messages' (Open: 7,580, Open and Unbatched: 7,563) and other metrics. The main content area is a list of contact results for the search query 'jane AND quorum' (Total 7). The results are displayed in a table with columns for Name, Activity, and Communication. Each contact row includes a checkbox, a preview image, and detailed information. The first contact in the list is 'Jane Pablo Alvarez-Quorum'. To the right of the list, there is a detailed view of this contact, showing their profile picture, name, birth date (November 11, 1961), age (64), and engagement level (Low). The detailed view also includes tabs for General, Discuss, Logs, Email Addresses, and Phone Numbers, along with a discussion box and various action buttons at the bottom.

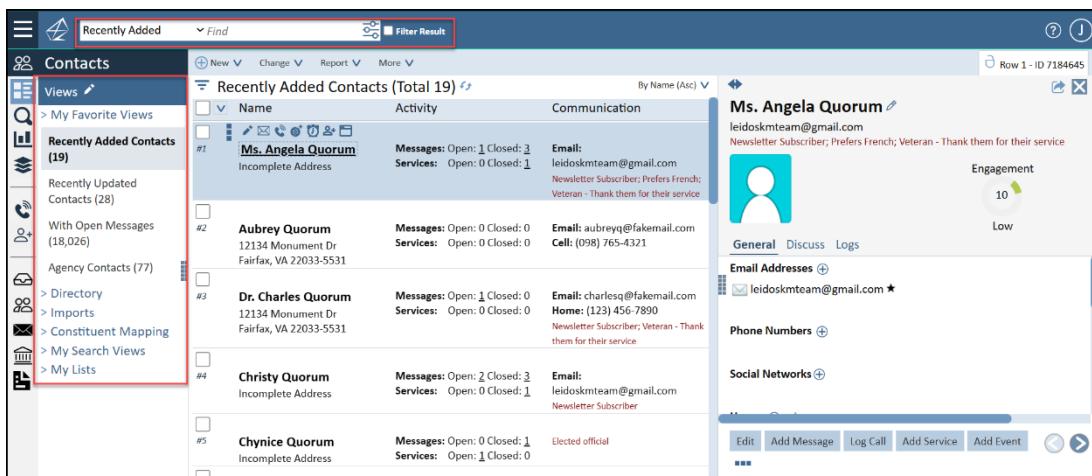
2. Go to [Selecting Multiple Records](#).

Option 2: Search for contact records via Contact Views

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



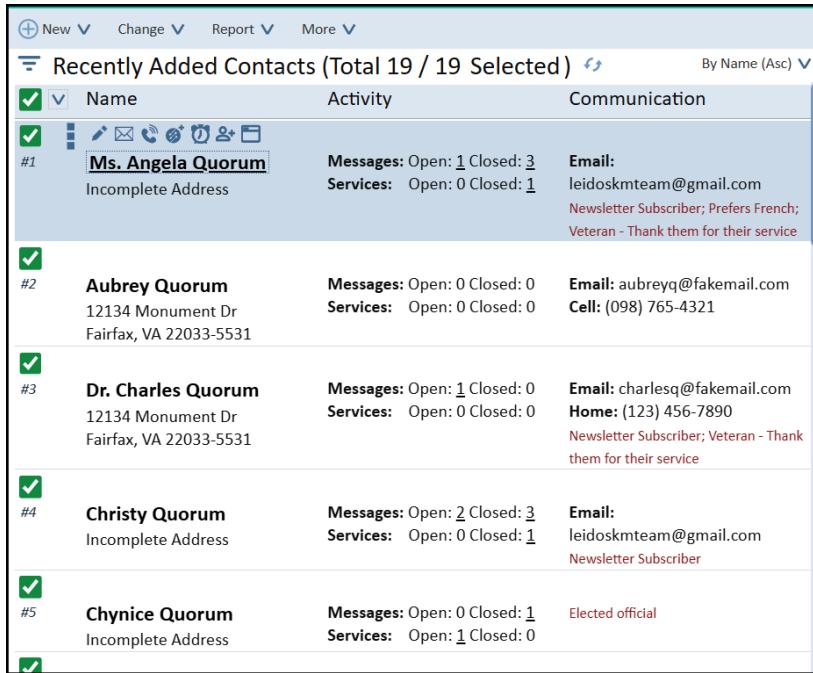
2. Use the Views/search bar to search for records.

The image shows the 'Recently Added' contact view. The left sidebar has a red box around the 'Views' section, which lists 'Recently Added Contacts (19)'. The main area displays a table of contacts with columns for Name, Activity, and Communication. The first contact listed is Ms. Angela Quorum, with details including incomplete address, 3 messages, 1 service, and an email address. The table is paginated with '1 of 1' at the bottom. The right side of the screen shows a detailed view for Ms. Angela Quorum, including tabs for General, Discuss, and Logs, and sections for Email Addresses, Phone Numbers, and Social Networks.

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.



	Name	Activity	Communication
#1	Ms. Angela Quorum Incomplete Address	Messages: Open: 1 Closed: 3 Services: Open: 0 Closed: 1	Email: leidoskmteam@gmail.com Newsletter Subscriber; Prefers French; Veteran - Thank them for their service
#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
#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
#4	Christy Quorum Incomplete Address	Messages: Open: 2 Closed: 3 Services: Open: 0 Closed: 1	Email: leidoskmteam@gmail.com Newsletter Subscriber
#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

#	Name	Category	Actions
#1	Mr. John Doe	Incoming	 
#2	Author	121	 

Add/Remove Affiliations

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

Activity

Projects (Total 19 / 19 Selected)

Messages: Open: 1 Closed: 3

Services: Open: 0 Closed: 1

Messages: Open: 0 Closed: 0

Services: Open: 0 Closed: 0

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