# 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.
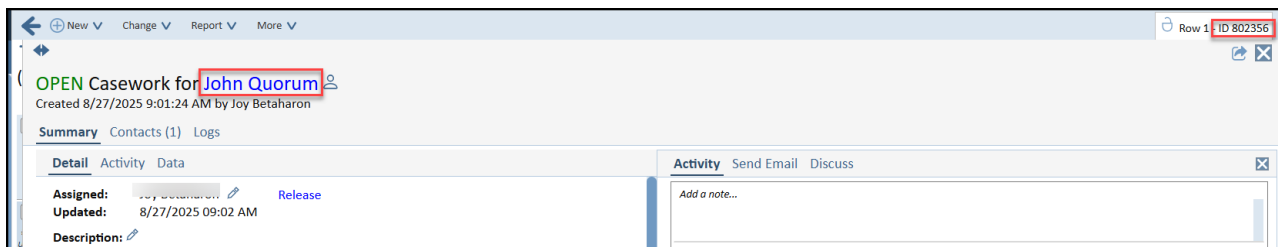
4. Navigate to the other record that will remain open.

5. Select the **Merge Services** button within the Service.
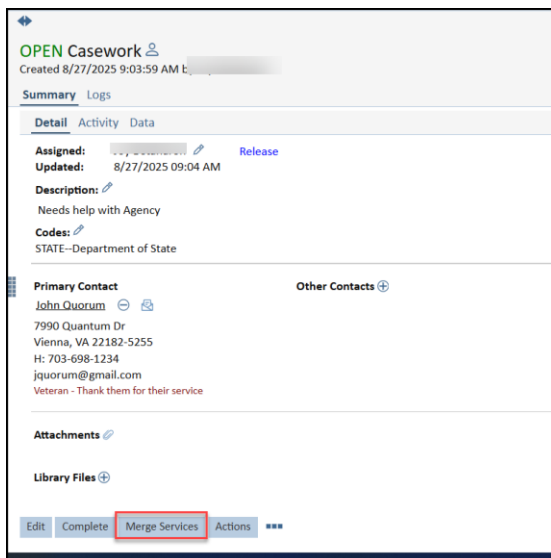
6. In the Merge Services window, enter the ID# or Primary Contact in the Open Services field. IQ will automatically search for that record and display the results. Select the correct service. Then, choose to either Delete Merged Service or close the service and select the appropriate *Closed Status Code*.

Merge Services

Merge Services

Open Services

802358

John Quorum(Primary) (ID:802358)

Type: Casework
Codes: Department of State

☐ Delete Merged Service

Closed Status Code...

ID#802359
Row 1

Close

Merge Services

Merge Services

Open Services

John Quorum(Primary) (ID:802358)

☐ Delete Merged Service

Closed Status Code...
Closed Duplicate

Closed Case Cancelled

Closed Duplicate

Closed Favorably

Closed No Privacy Waiver Received

Closed Unfavorably

Service closed neither favorably or unfavorably

ID#802359
Row 1

Merge   Close

7. Click the **Merge** button.

Merge Services ✕

Merge Services

Open Services

John Quorum(Primary) (ID:802358)

☐ Delete Merged Service

Closed Status Code...

Closed Duplicate ⌄

ID#802359
Row 1

[Merge] [Close]

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 a 📎.

Activity Send Email Discuss

Add a note...

🪝 ↪ ⏱

Search...

⦿ All ○ Message ○ Notes ○ Attachments

Completed Merge of Workflow ID '802358' which was CLOSED with Status = 'CLOSED.DUPLICATE'.
8/27/2025 - 11:12 AM

✏ 🗑 📌
Summary Report Of Merged Workflow # 802358
📄 802358_Summary.txt
8/27/2025 - 11:11 AM

Process Case Begun 8/27/2025 - 11:07 AM