

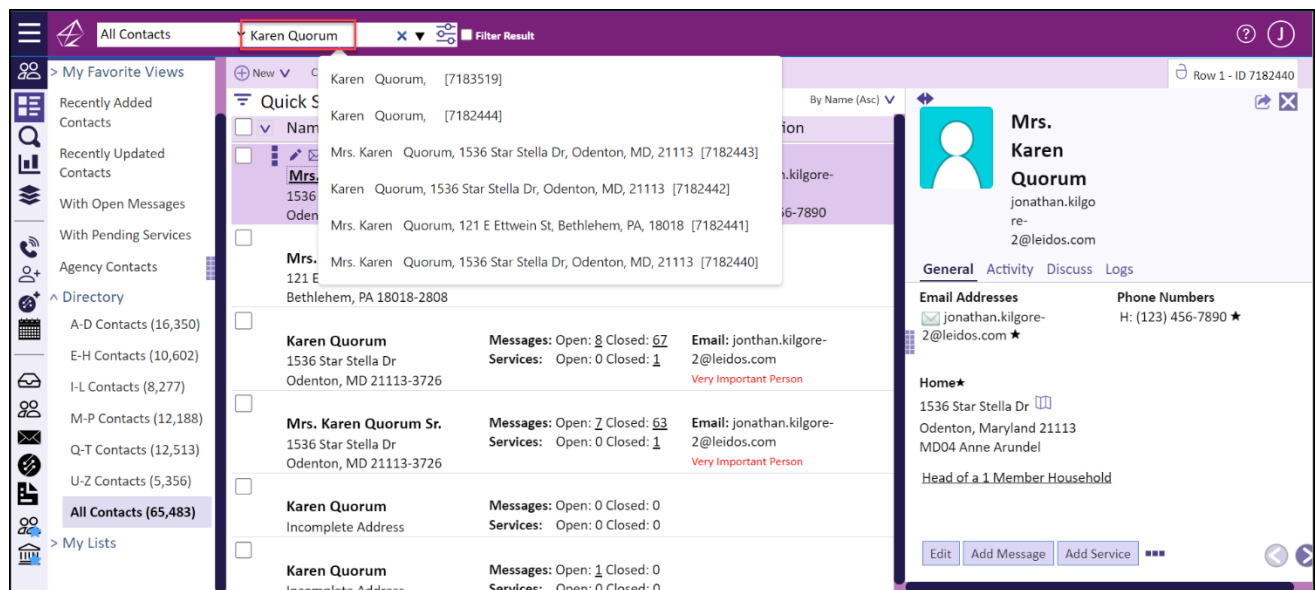
Merging Duplicate Contact Records in IQ5

Market: House, Senate

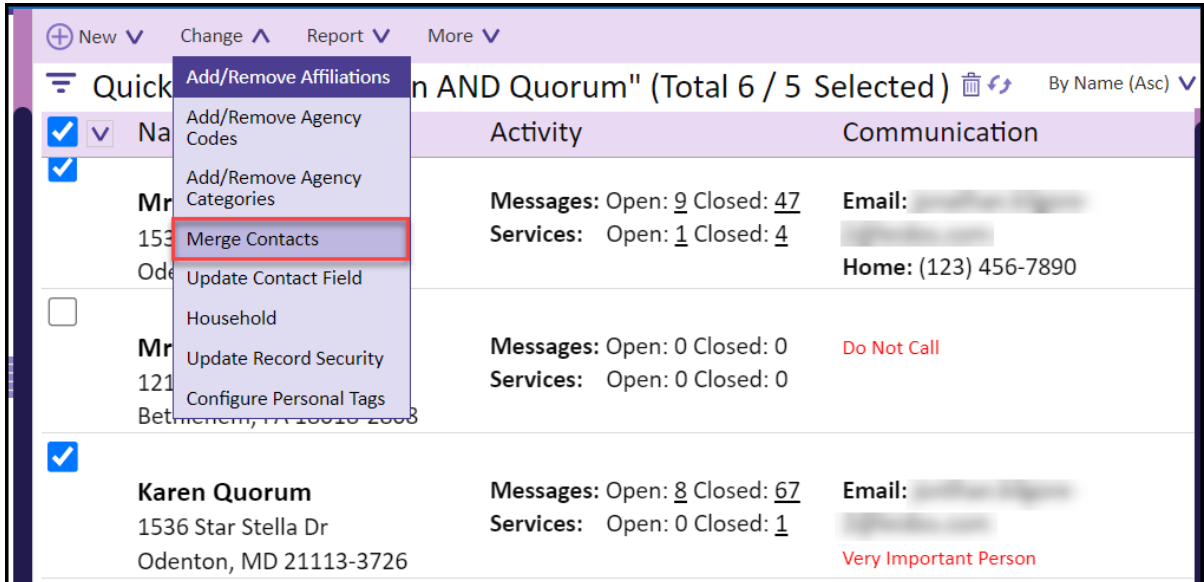
Description: These instructions teach users how to merge duplicate contact records.

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.



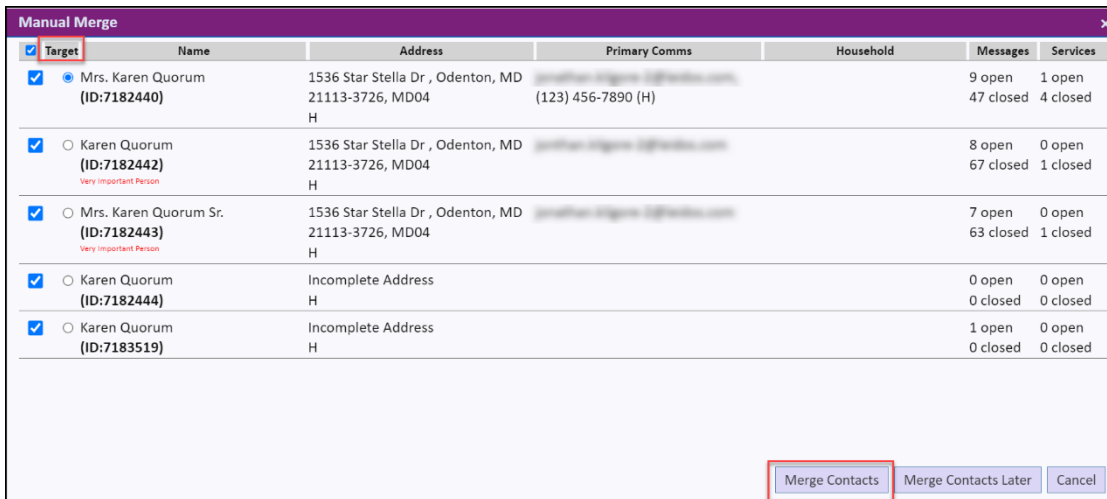
2. If duplicates are found, **check the boxes** next to each duplicate you would like to Merge. Then **Click Change → Merge Contacts**.



The screenshot shows the Intranet Quorum interface. A context menu is open over a contact list, with the 'Merge Contacts' option highlighted. The contact list displays details for Karen Quorum, including her address and communication statistics.

Activity	Communication
Messages: Open: <u>9</u> Closed: <u>47</u> Services: Open: <u>1</u> Closed: <u>4</u>	Email: [Redacted] Home: (123) 456-7890
Messages: Open: 0 Closed: 0 Services: Open: 0 Closed: 0	Do Not Call
Messages: Open: <u>8</u> Closed: <u>67</u> Services: Open: 0 Closed: <u>1</u>	Email: [Redacted] Very Important Person

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**.



The screenshot shows the 'Manual Merge' dialogue box. It contains a table with columns for Name, Address, Primary Comms, Household, Messages, and Services. The first row is selected as the 'Target' contact. The 'Merge Contacts' button is highlighted at the bottom right.

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	[Redacted] (123) 456-7890 (H)		9 open 47 closed	1 open 4 closed
<input checked="" type="checkbox"/>	Karen Quorum (ID:7182442) <i>Very Important Person</i>	1536 Star Stella Dr., Odenton, MD 21113-3726, MD04 H	[Redacted]		8 open 67 closed	0 open 1 closed
<input checked="" type="checkbox"/>	Mrs. Karen Quorum Sr. (ID:7182443) <i>Very Important Person</i>	1536 Star Stella Dr., Odenton, MD 21113-3726, MD04 H	[Redacted]		7 open 63 closed	0 open 1 closed
<input checked="" type="checkbox"/>	Karen Quorum (ID:7182444)	Incomplete Address H			0 open 0 closed	0 open 0 closed
<input checked="" type="checkbox"/>	Karen Quorum (ID:7183519)	Incomplete Address H			1 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.