

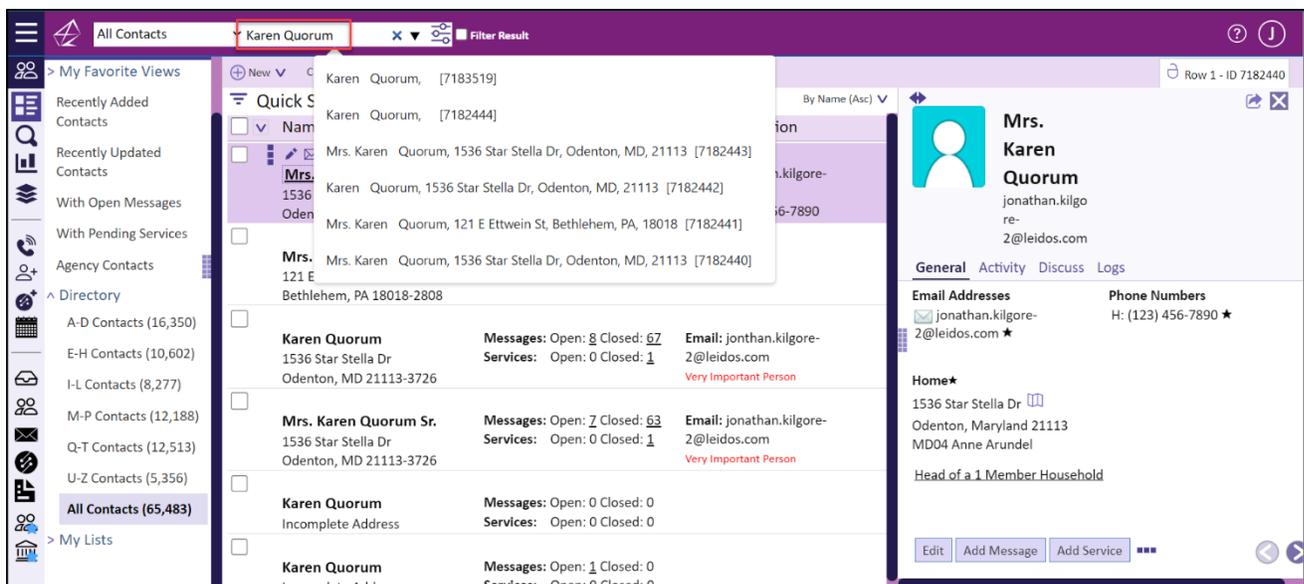
Merging Duplicate Contact Records in IQ5

Market: House, Senate

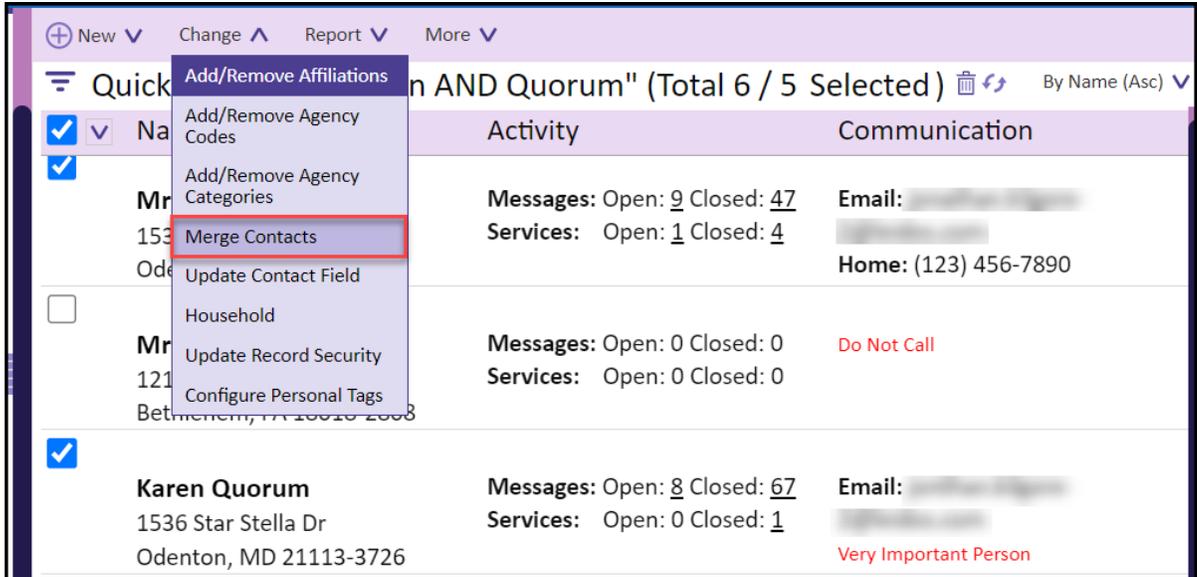
Description: These instructions teach users how to merge duplicate contact records.

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.



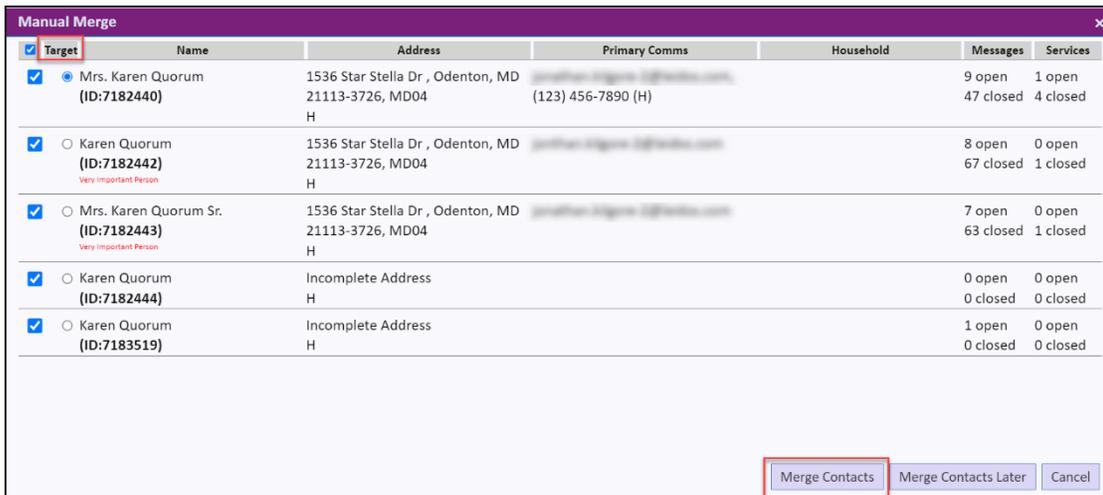
2. If duplicates are found, **check the boxes** next to each duplicate you would like to Merge. Then **Click Change → Merge Contacts**.



Quick Add/Remove Affiliations (Total 6 / 5 Selected) By Name (Asc)

Name	Activity	Communication
Mr. [Redacted]	Messages: Open: 9 Closed: 47 Services: Open: 1 Closed: 4	Email: [Redacted] Home: (123) 456-7890
Mr. [Redacted]	Messages: Open: 0 Closed: 0 Services: Open: 0 Closed: 0	Do Not Call
Karen Quorum 1536 Star Stella Dr Odenton, MD 21113-3726	Messages: Open: 8 Closed: 67 Services: Open: 0 Closed: 1	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**.



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