

Tagging a Contact in a Discussion

Market: House, Senate

Description: These instructions teach users how to tag other IQ contacts in a discussion. As a result, individuals who are tagged in the discussion will receive an alert notification in IQ and MS Outlook (if configured).

1. Search for the contact using the **Search Bar** at the top of the page to look for the individual across the various **Contact Views**.



2. Click the name of the contact record if the Reading Pane is not displayed as shown above. The Contact Record will expand to show full details.



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3. Click the **Discuss** tab to open the section.

General Activity Discuss Logs	Engagement 2 Low	
Add Discussion Message		
Alert these Users or Groups		
		Post

4. In the **Discuss** section, enter the discussion message. Also enter the name of the other user(s) that you want to include in a discussion about the selected contact. Click **Post**.



Captain John Crunch capt.crunch@fakemail.com Newsletter Subscriber; US Vet; Very Important Person General Activity Discuss Logs	Engagement 2 Low
Add Discussion Message Please follow up in 3 days.	
Remaining Characters: 3966 Alert these Users or Groups Bri Quorum X Profile Caseworker X Alert these Users or Groups	
	Post

- **5.** The user(s) will receive an alert notification on their homepage tile regarding the discussion in IQ and MS Outlook (if this option is configured in their IQ settings). Alerts can also be found in the **My Inbox** application.
 - **a.** Click on the **Discussion** link in the **Alerts** tile. This opens the **My Alerts** view in the **My Inbox** application.

Alerts	
Discussion	3
Document	5
Mail	4

b. Go to **My Inbox** application → **My Alerts**



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