Creating Batch/Auto-Send Rules in IQ5

Market: House, Senate

Description: These instructions teach users how to create **Batch/Auto-Send Rules** which automatically add settings to messages placed in the Batch such as Issue code and Form Letter assigned. IQ then sends the Letter for you on the day(s) of your choice at the time of your choice.

Create a Batch Rule from Batches

- 1. Navigate to the **Messages** application.
- **2.** Click on the **Batches View**.
- 3. Select **Response Rule** in-row action for the Batch you'd like to add a rule to.
- **4.** Add your rules such as an Issue code and Form Letter in the Edit Batch Response dialog.

Edit Batch Response		
Comments		
OAdd to existing OUpdate if empt	y ○Remove existing	/
Issues		
Affiliations		
Bill		
⊖Supports ⊖Opposes ●No Positi	on	
Assigned To	Include Histo	ory
Letter Name		
Create New Letter		
No Response and Close		
30	ID#553 Row 2	Save Close

5. Click Save.

Create a Batch Rule from Campaigns/Bills/Individual Messages

- 1. Navigate to the **Messages** application.
- 2. Click on Message Processing.
- **3.** Select the **Batch** action for the **Campaign** or **Bill** you'd like to batch. For **Individual Messages**, select the messages and then click the **Batch** menu action.

\prec	Messages	🗲 0	hange 🗸 Report 🗸 More 🗸 🛛 🛛	latch						Row 1 - ID 1001
E	Views 🖍				By Open Message Count (Desc) V					
۹,	Message Processing		Campaign Name	Create Latest Open d	No Batch	Total	Rule	A covid resu Created 8/23/202		
	Possible Requests (3) Campaigns Without		A covid resurgence???	8/23/2023 8/23/2023 3000	3000	3000	No	Summary Ana Unbatched Cour	lysis Response/Autosend	Discuss Logs
N	Rule (13) Bills Without Rule		Home Ownership is out of reach for too many	8/23/2023 8/23/2023 2000	2000	2000	No	Total Count	3000	
•	(10) Individual		Is climate change causing wildfires?	8/23/2023 8/23/2023 2000	2000	2000	No	Variations Batches	2 <u>Unbatched(3000)</u>	
	Unprocessed Messages (1) Awaiting Letter		NO MORE public	4/14/2023 4/14/2023 1999	1999	2000	No	Open Count Responses	3000	
) 	Approval (27) All Open Unbatched		Require Nutrition Classes in Public Education!	4/14/2023 4/14/2023 1999	1999	1999	No	Sample Subject Sample Message		
	(13,075) All Open with No		Pass the Stimulus!	12/29/2020 12/29/2020 498	498	498	No	, mask up again	revent this resurgence? I do N . They weren't even effective.	Are we going t
	Letter (12,989) Batches Without Rule		Save the economy!	4/19/2021 4/19/2021 483	483	505	No	need more vaccines? When are we going to get a handle on this craziness? I do not want our children doing remote school. That was a catastrophe!		
	Batches Without Rule (5) Batches Without		Support HRES 1064	2/8/2021 2/9/2021 202	202	500	No	school. That w	as a catastrophe!	(

4. Select an existing Batch from the dropdown or click on the "+" icon to create a new one.

Campaign Batch and Issue Update Rule		×	
All Open and future messages added to this Campaign will have these settings applied. Batches S All Active Unlocked O Remove Current			
All Batches	Θ	Ð	
Issues			
	Update	el	

- **5.** Review or create the Batch Response rules as in step 4 above.
- 6. Click Update.

Create an Auto Send Rule

- **1.** Click on a Batch that has a Response Rule.
- 2. Select the Enable Auto Send in-row action.
- **3.** Add your Auto Send Rules.
- **4.** Click Start Auto-Send button.



Set Up Batch Auto-Send	×						
Automatically approve and email all unrestricted open messages in this batch that have an approved version of the letter							
Education061523							
Send on these days: 🔄 Sunday 🔄 Monday 🛃 Tuesday 🛃 Wednesday 📝 Thursday 🚺 Friday 📄 Saturday							
Start Sending these messages at 08:00 AM O							
Messages must be at least 24 hours old before they are elligible for auto-sending.							
Stop automatically sending messages on 12/29/2023							
Start Auto-Send Cancel							

Note: The "Messages must be at least X hours old" field will tell IQ how old an incoming message must be (how many hours it has been in your IQ system) before your letter will send as a response. This helps ensure a timely response.