

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.

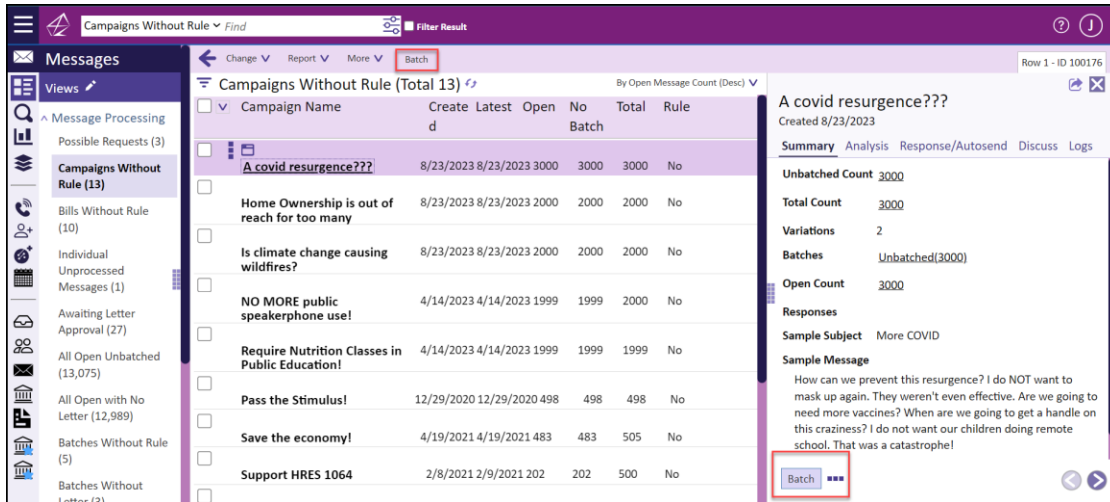
Create a Batch Rule from Batches

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.

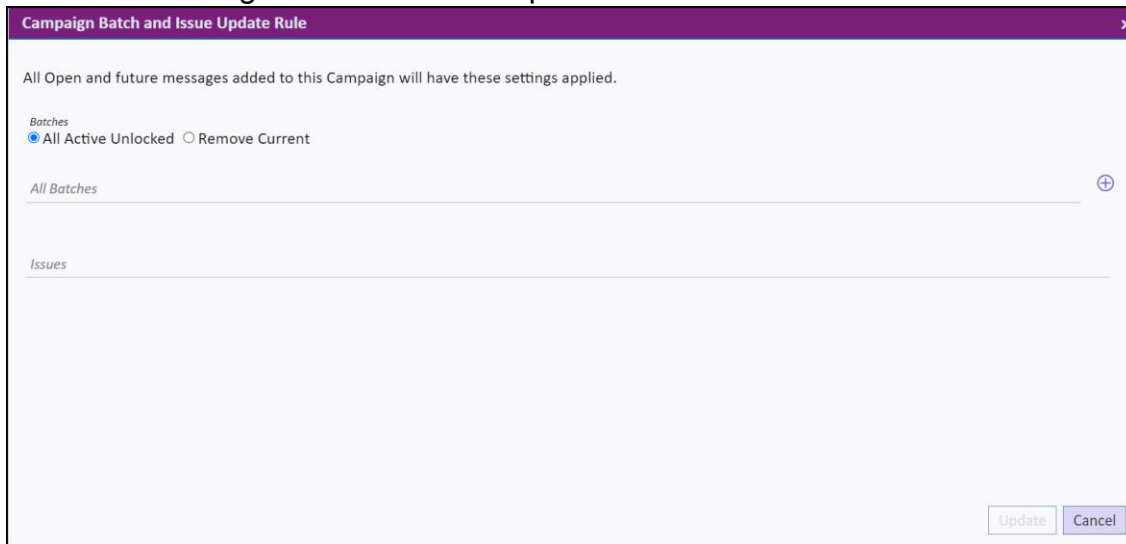
5. Click **Save**.

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.



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



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 [X]

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 [Clock Icon]

Messages must be at least 24 hours old before they are eligible for auto-sending.

Stop automatically sending messages on 12/29/2023 [Calendar Icon]

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.