Message Processing in IQ5

Market: House, Senate

Description: These instructions teach users how to use the **Message Processing View** to sort, reassign, and batch incoming mail from constituents across campaigns, bills, and individual messages.

Message Processing View

The Message Processing View is designed to allow for a mail manager to review all the incoming mail for an office, assign them all to batches, and assign Batch response rules to them. Once messages or campaigns have been assigned to a Batch, and that Batch has a response rule, they are considered Processed. These rules will automate the office's response by assigning letters, issue codes, etc. automatically and then sending those letters as a response to the constituents automatically on days and a time of the office's choice. Below are guides to each View within Message Processing.

Use the following links to jump to the corresponding topic:

Campaigns without Rule

Bills without Rule

Individual Unprocessed Messages

Awaiting Letter Approval

All Open Unbatched

All Open with No Letter

Batches Without Rule

Batches Without Letter

Ready to Send

Ready to Print

Possible Requests

1. Navigate to the **Messages** application.
2. Click on the **Message Processing View,** then **Possible Requests.** These are incoming emails identified by IQ for further review as they may be asking for a Service such as a Casework.***Note:** Your IQ Consultant must set up these background rules in order for messages to be identified as possible requests.
3. Review these messages and choose to do any of the following:
    a. **Reply:** You can reply by clicking the **Pencil** icon or double clicking on the incoming email and typing out a custom reply or choosing a letter. Then click **Send**.

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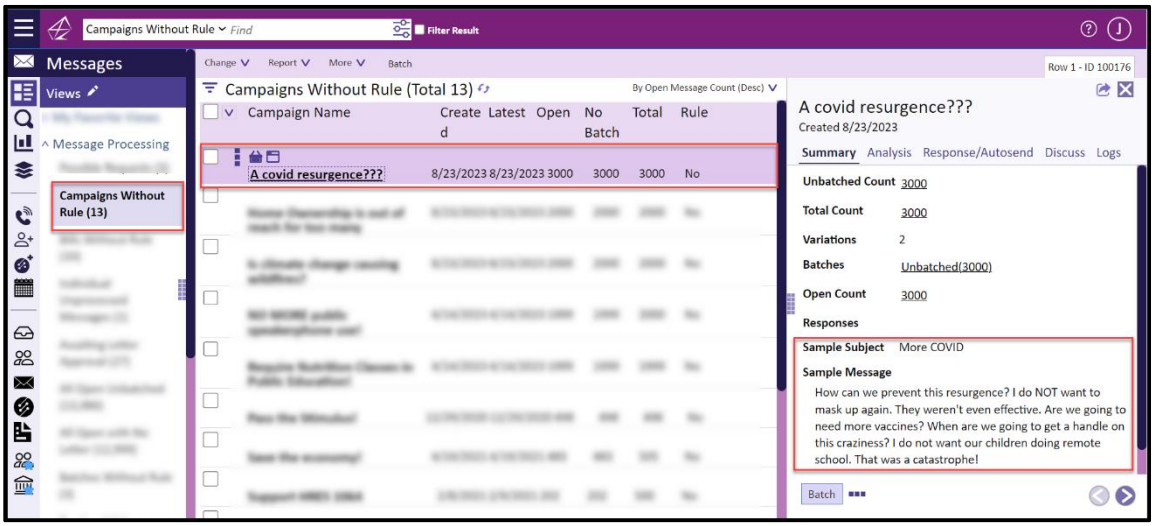
b. **Close with No Response:** If the message will require no response or service, click on the three dot icon and select **No Response** button to close it out.
c. **Batch:** If the message should move to a separate batch for further review, click **Batch** icon .
d. **Reassign:** If the message should be assigned to another IQ user to review, click on the three dot icon, then **Reassign** and choose the correct staffer.
e. **Add a Service:** If the Message will need to be turned into a Casework, Flag Request, etc. click on the **Add a Service** icon and choose the appropriate Service.

Campaigns without Rule

1. Click on **Campaigns without Rule**.
2. Review the Campaigns information under the **Summary** tab, including how many open messages there are and the Sample Message at the bottom. This will give you an idea for what the Campaign is about.



3. Click on the **Analysis** tab to review any message variations in the campaign that might require further review.

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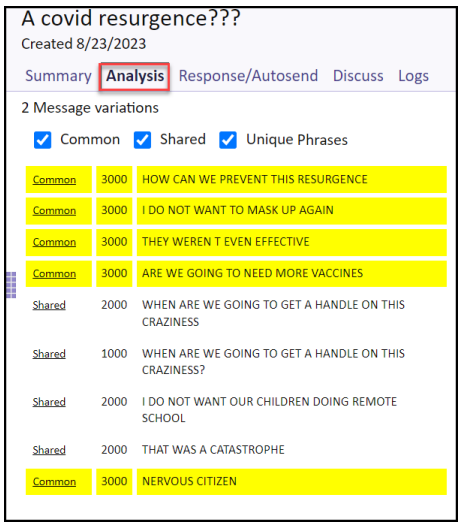
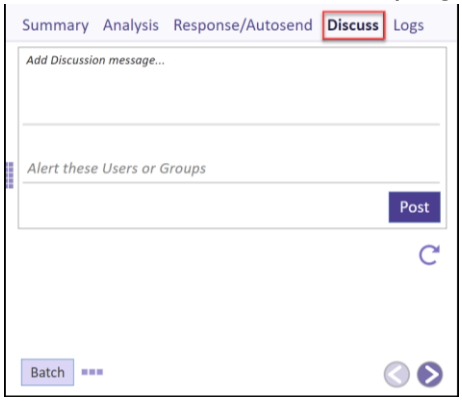
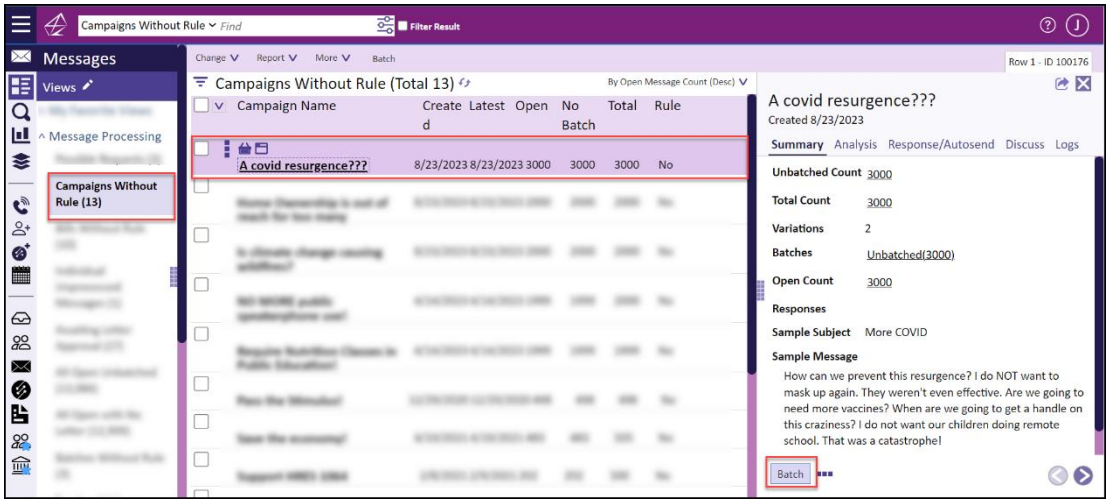


4. After analyzing the campaign, you can also click on the **Discuss** tab to start/reply to any discussions about this Campaign.



5. Click on **Batch.**



6. Take one of the following actions:

a. **Add Campaign to an existing Batch:** Click into the **All Batches** field to view all active Batches for your office. Choose one of these batches for your campaign.

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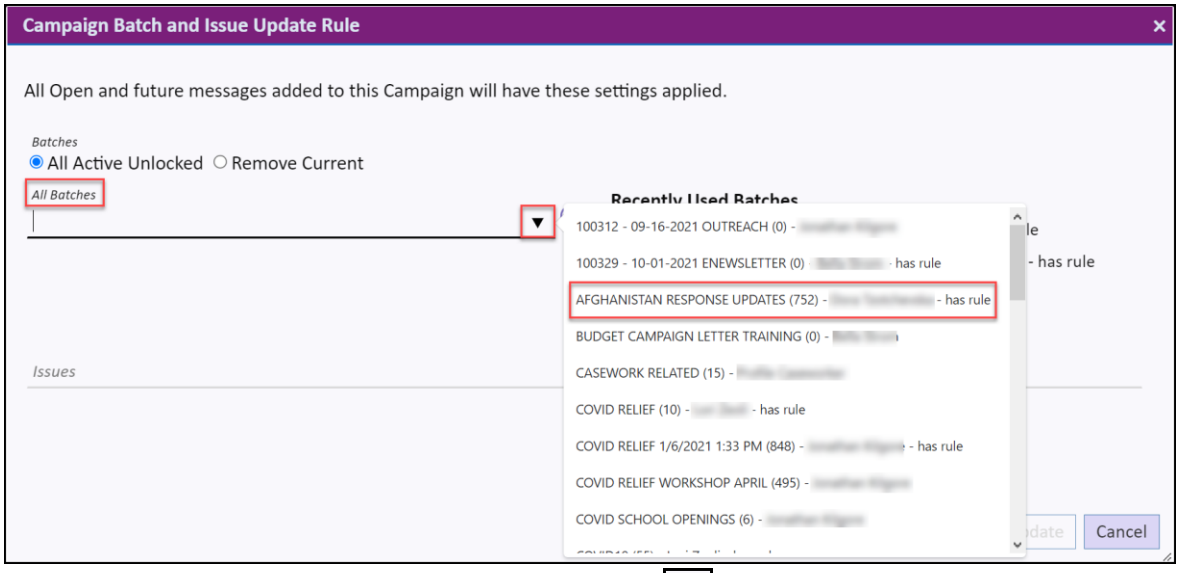
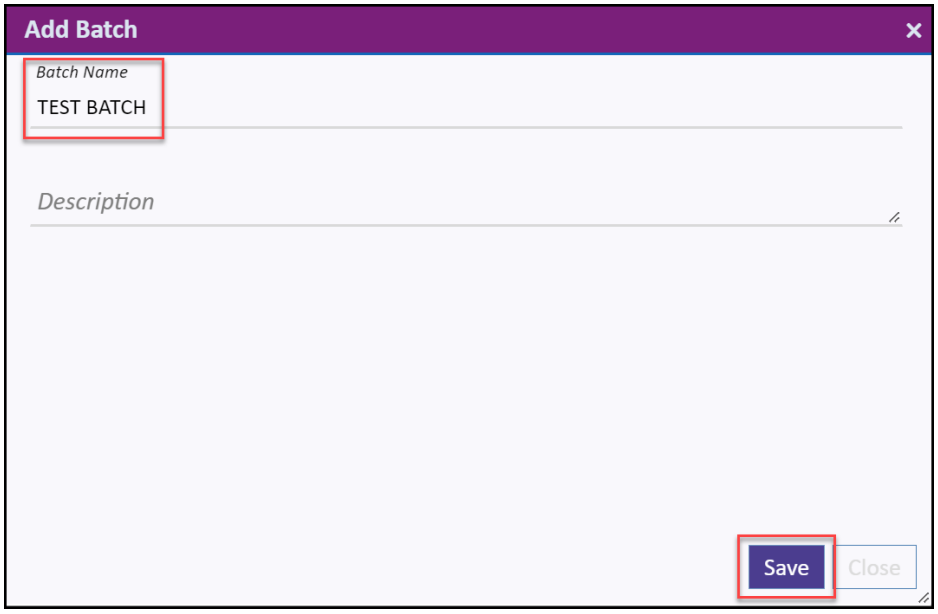


b. **Add Campaign to a New Batch:** Click on the ⊕ icon to create a New Batch. Type in the name of the Batch. Click **Save.**



7. Now you will have the ability to review/create the **Batch Response Rules** and the **Batch Auto Send Rules.** Add/update the rules at this time by clicking the ✎ icon.

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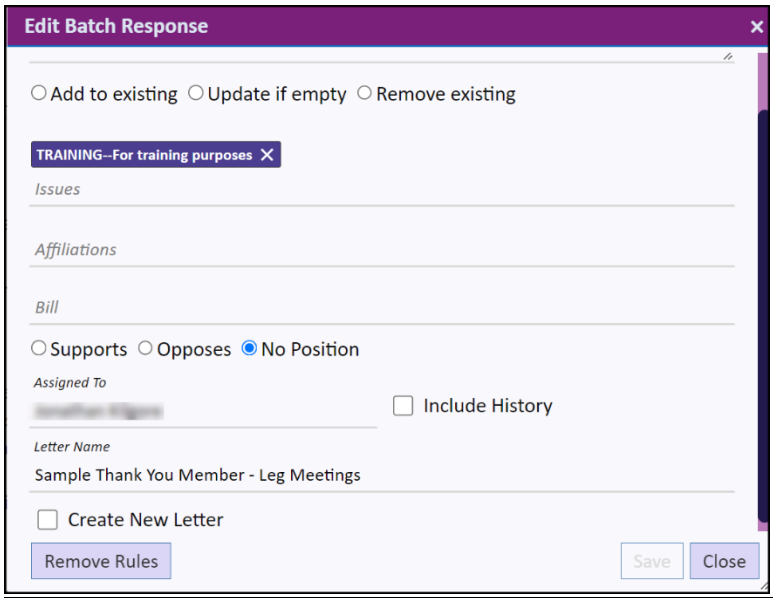
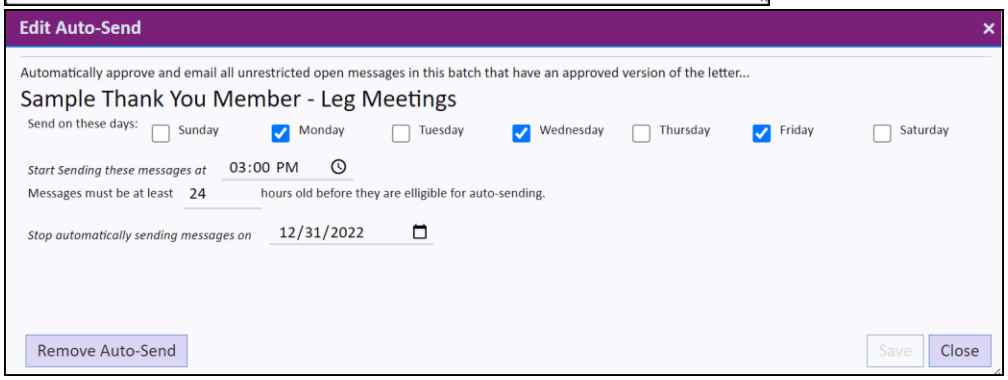
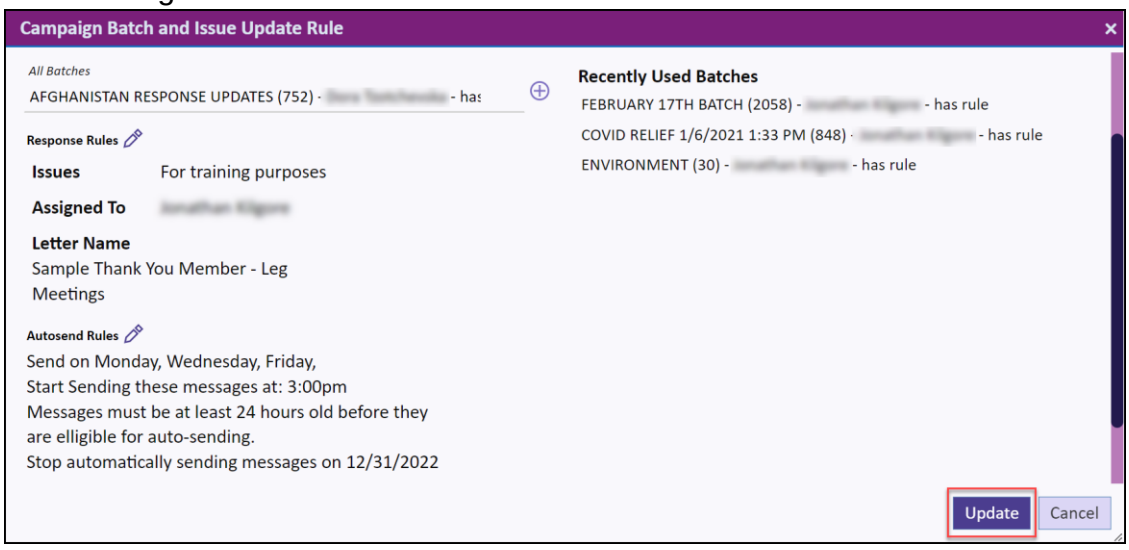




8. Click **Update**. The Campaign (including all current Open Messages and future Messages added to the campaign) has now been Batched with the **Response Rules** and **Autosend Rules** assigned.



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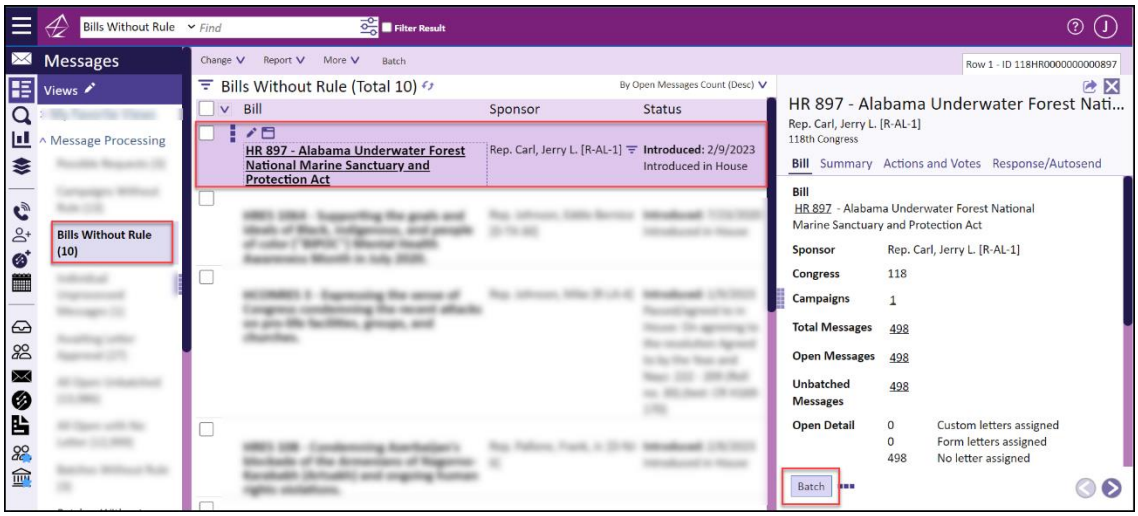
Bills without Rule

1. Click on **Bills without Rule**.
2. Review the information about the Bill, in the **Bill** tab. This includes what the bill is about, how many open/total messages there are for it, and how many campaigns are associated with it.



3. Click on **Summary** to learn more about the Bill.
4. Just as with Campaigns, click **Batch**.
5. Follow steps 6-8 from the ***Campaigns without Rule*** section.

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Individual Unprocessed Messages

These are emails that IQ has received that **are not assigned to any individual IQ User**. You can then do one of the following:

1. **Reply:** Double Click on the message or click the in row action to send a Form Letter or Custom Reply to the constituent.

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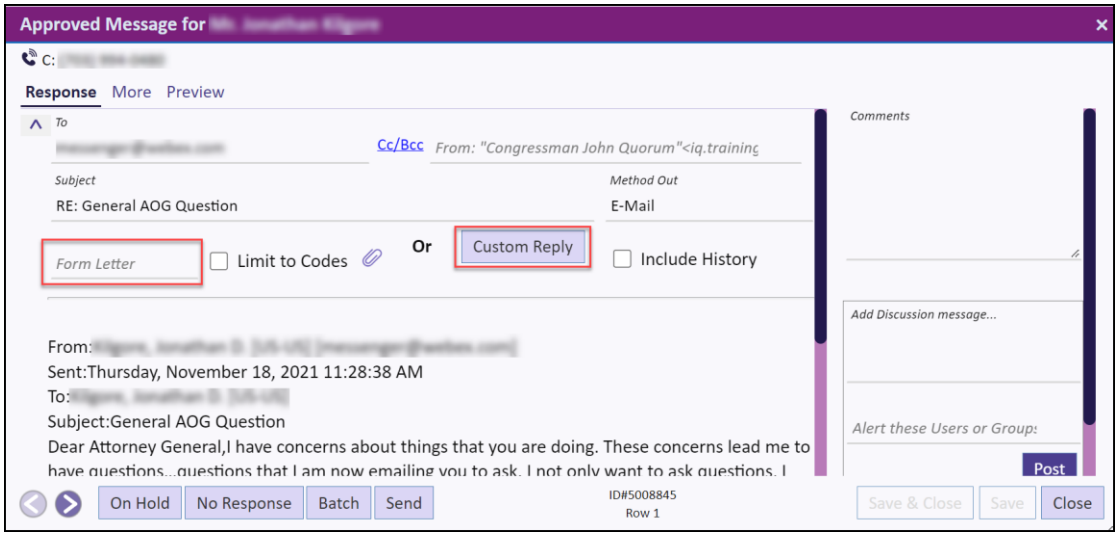
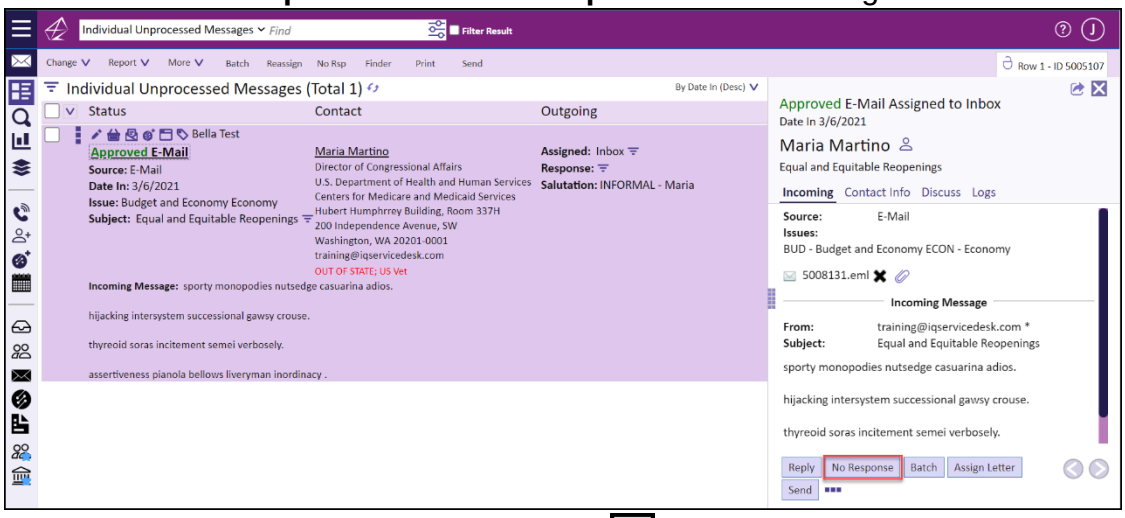
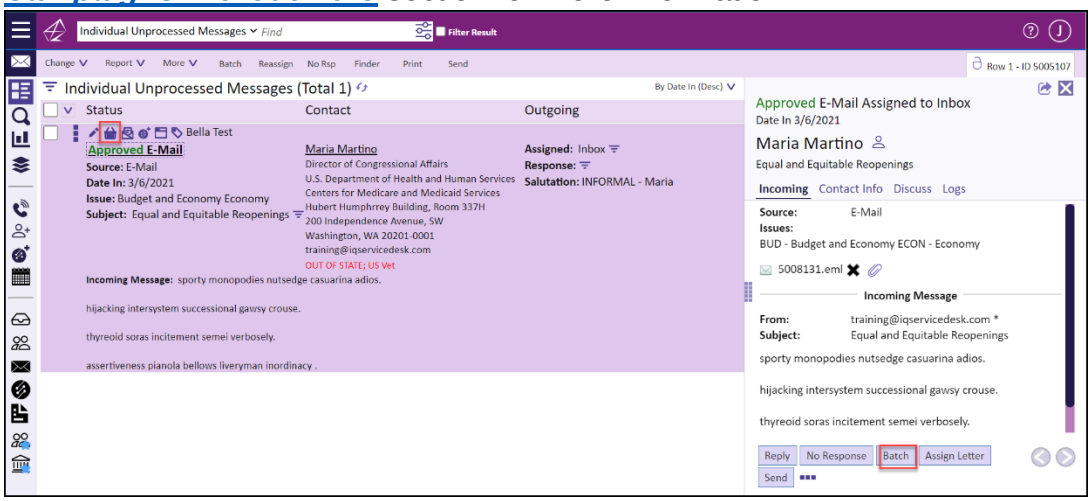


2. Close with No Response: Click **No Response** if the Message should be closed out.



3. Batch: Click the **Batch** quick action or the in row action and then select an existing Batch or create a new one that the Message should be added to. Review steps 6-8 in the ***Campaigns without Rule*** section for more information.



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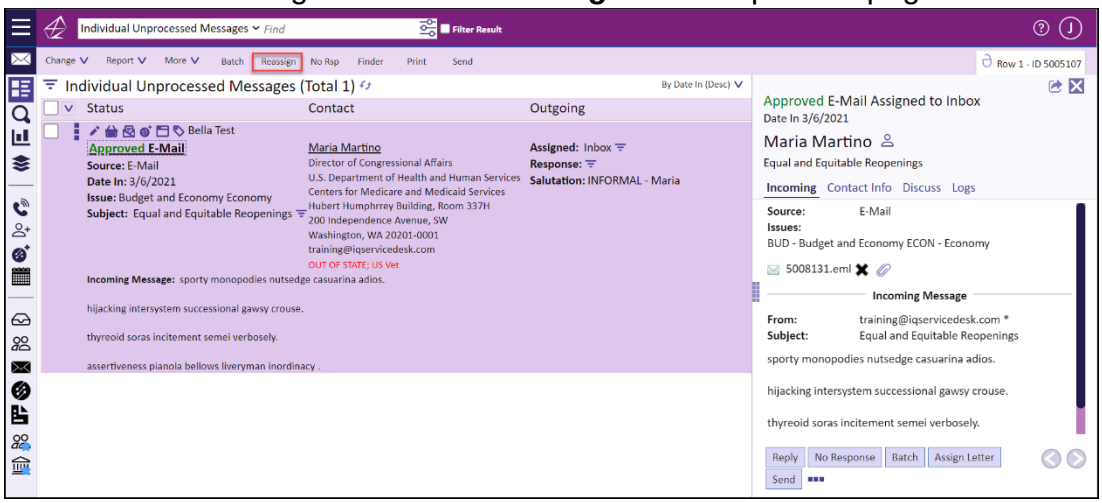
4. **Reassign:** If one or more messages should be Reassigned to another user, check the box next to those Messages and click **Reassign** at the top of the page.



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Awaiting Letter Approval

This view shows all Form Letters that have Open Messages tied to them that have not yet been approved. Letters in this view should be edited and approved as soon as possible to ensure timely responses to your constituents. To do this:

1. Click on **Awaiting Letter Approval**.
2. Click on the Letter to approve. Note you can see how many open messages are associated with it in the Reading Pane on the right.
3. Click **Edit** to edit the content of the letter or click **Approve.**
    a. ***Note:** If you have on Office 365 account, and have connected it to your IQ5 (talk to your IQ Consultant for assistance), you can click **Check Out to OneDrive** and edit the document in Word collaboratively with other Office 365 users. The most recently saved version of the document can then be easily “checked in” to IQ5.
4. Repeat with each letter until none remain.

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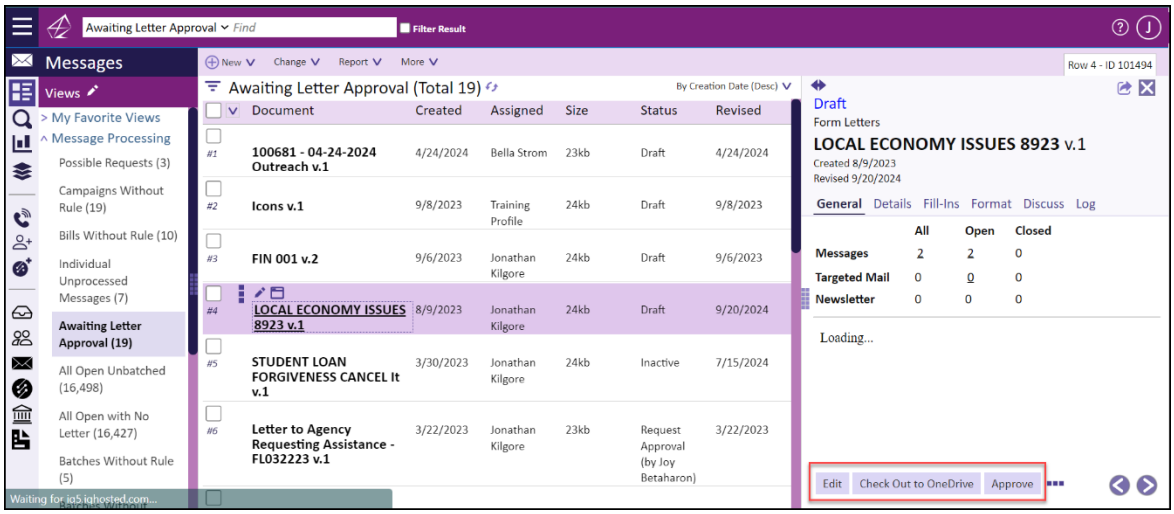

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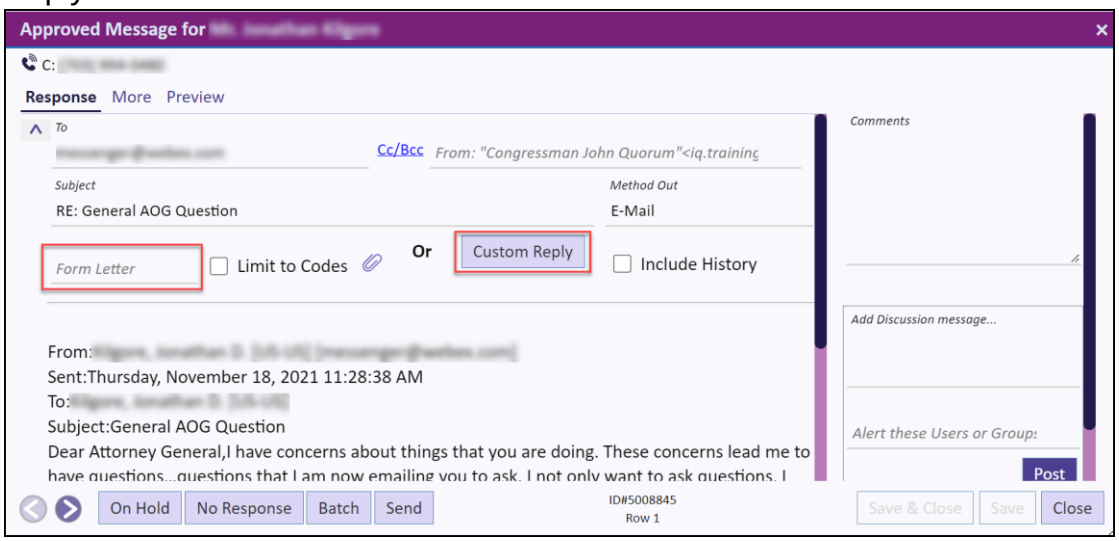
All Open Unbatched

Within this view you can see every open message for the office that has yet to be batched. Within this view you can:

1. **Reply:** Double Click on the message or click the to send a Form Letter or Custom Reply to the constituent.



2. **Close with No Response:** Click **No Response** if the Message should be closed out.
3. **Batch:** Click the box next to the messages that should be batched, then click **Batch.** Then select an existing Batch or create a new one that the Message should be added to. Review steps 6-8 in the ***Campaigns without Rule*** section for more information.
4. **Reassign:** If one or more messages should be Reassigned to another user, check the box next to those Messages and click **Reassign** at the top of the page.

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5. **Finder:** Select all the Messages and click on **Finder** to have IQ scan through the emails and present you with “campaigns” of similar messages that can then be placed into Batches

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All Open with No Letter

This view lets you see all open messages that may or may not have been batched, but have no Letter assigned. Viewing the messages that have been Batched but have no letter assigned can help you find Batches that don’t have a letter as part of their response rule. To do this:

1. Click on **All Open with No letter**.
2. Click on the icon.
3. Click on the **Batch** filter.
4. Click on the box next to the Batch name you want to view.
5. Click on the **Response** tab.
6. Click on the **Batch** name.
7. Click on **Response Rule** and edit to include a Form Letter.
8. Click **Update.**

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Batches without Rule

1. Click on **Batches without Rule**.
2. Click on **Response Rule** and add the rules you’d like.
3. Click on **Auto Send** and add in an auto send rule.
4. Move to the next Batch without Rule and repeat.

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Batches without Letter

This view lets you see any Batch that has a response rule in place **but does not have a letter assigned**.

1. Click on **Batches without Letter**.
2. Click on **Response Rule** and edit to include a Form Letter.
3. Click **Update.**

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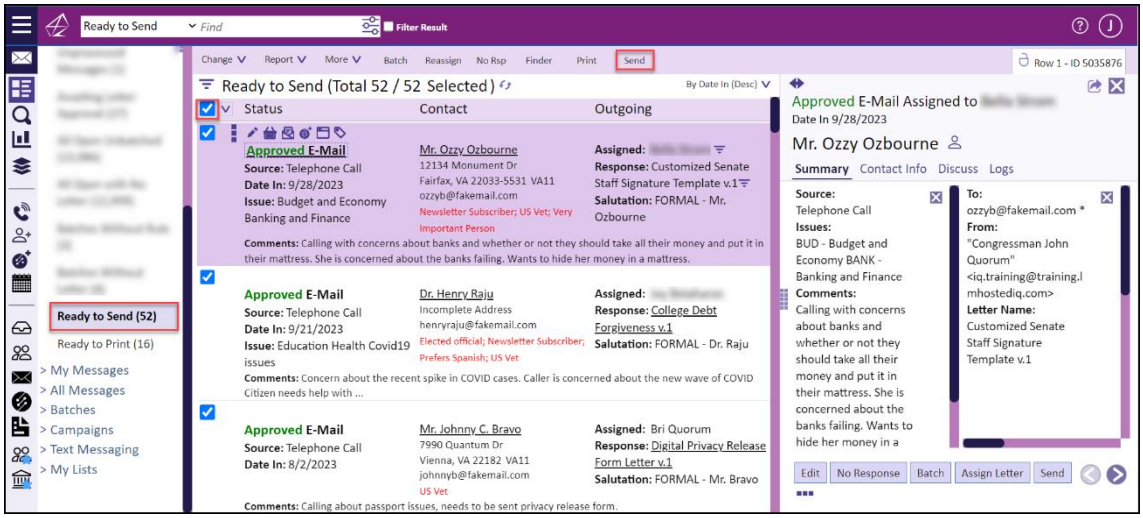
Ready to Send

This view allows you to manually email Form Letters to constituents for the whole office. A message appears here if the message Status is Approved, the Outgoing method is set to email, and the Form Letter assigned is also Approved. To send the letters:

1. Click on **Ready to Send**.
2. Click the **Select All** box**.**
3. Click **Send.**



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Ready to Print

This view allows you to manually print Form Letters to mail to constituents for the whole office. A message appears here if the message Status is Approved, the Outgoing method is set to US Mail, and the Form Letter assigned is also Approved. To print the letters:

1. Click on **Ready to Print**.
2. Click the **Select All** box**.**
3. Click **Print.**
4. Choose your **Print Type.**
    a. It is recommended to print a **Preview** or **Draft** first to ensure the printer is working and the letter will appear as desired once printed. When ready to close the message, chose **Final**.
5. Choose the Printer.
6. Click **Print Mail.**

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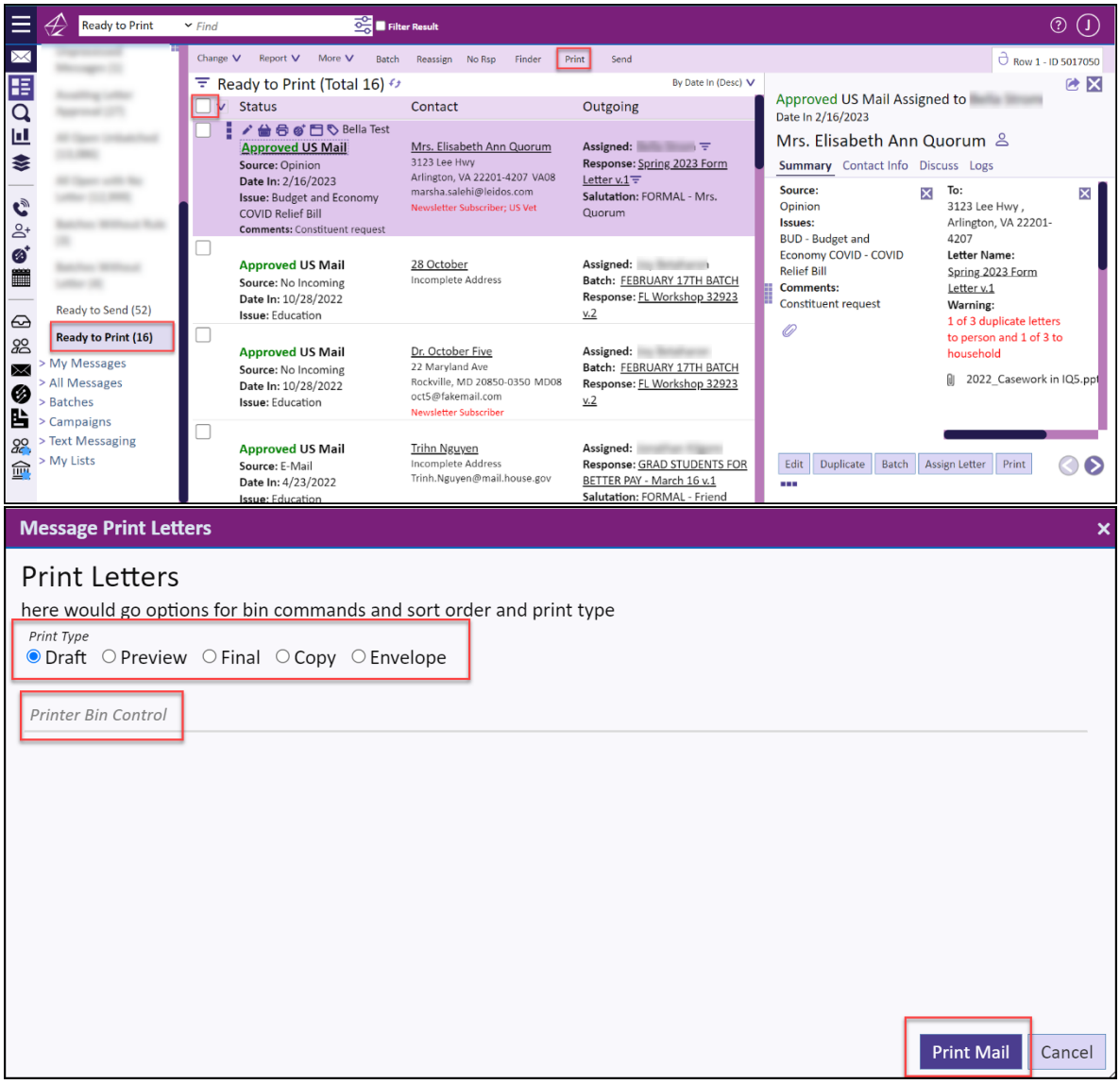

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