

## Creating a Form Letter

**Market:** House, Senate

1. Navigate to **Library** → **+New** → **Form Letter**.
2. Enter the name for your new **Form Letter**. Select the library directory location to store the **Form Letter**. The default template will display in the Format field, but you can change it. A preview of the selected format will display. The email version is on the left and the printed version is on the right. Select **Create**.


**Add Form Letter** ✕

### Add Form Letter

Name

Directory

Format

  
**Congress of the United States**  
 House of Representatives  
 Washington, DC

MAIL.DATE\_ON\_LETTER\_FOR\_

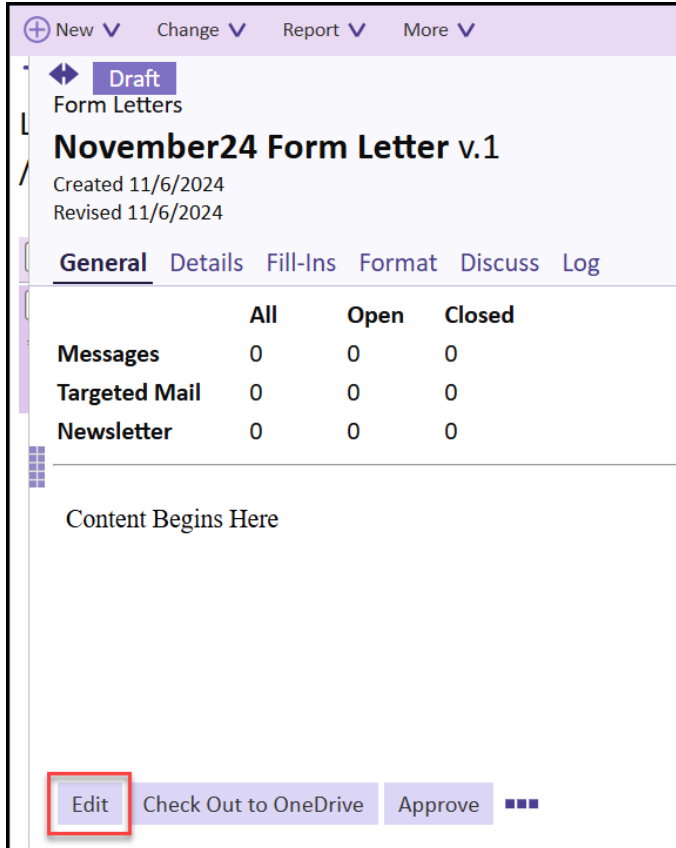
Dear newsletter.salutation\_for\_merging.merge,

Mail.date\_on\_letter\_for\_printing.merge

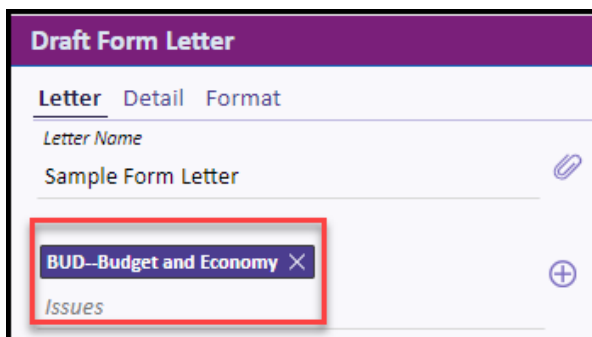
Mail.name\_based\_on\_salutation.merge  
 Mail.address.title.merge  
 Mail.address.org1.merge  
 Mail.address.org2.merge  
 Mail.address.addr1.merge  
 Mail.address.addr2.merge

Create
Close

3. The Draft **Form Letter** view will open. Click the **Edit** button.
  - a. **Note\***: The **Check Out to OneDrive** is only available for offices that have connected their Office 365 account with IQ. Talk to your IQ Consultant for more information.




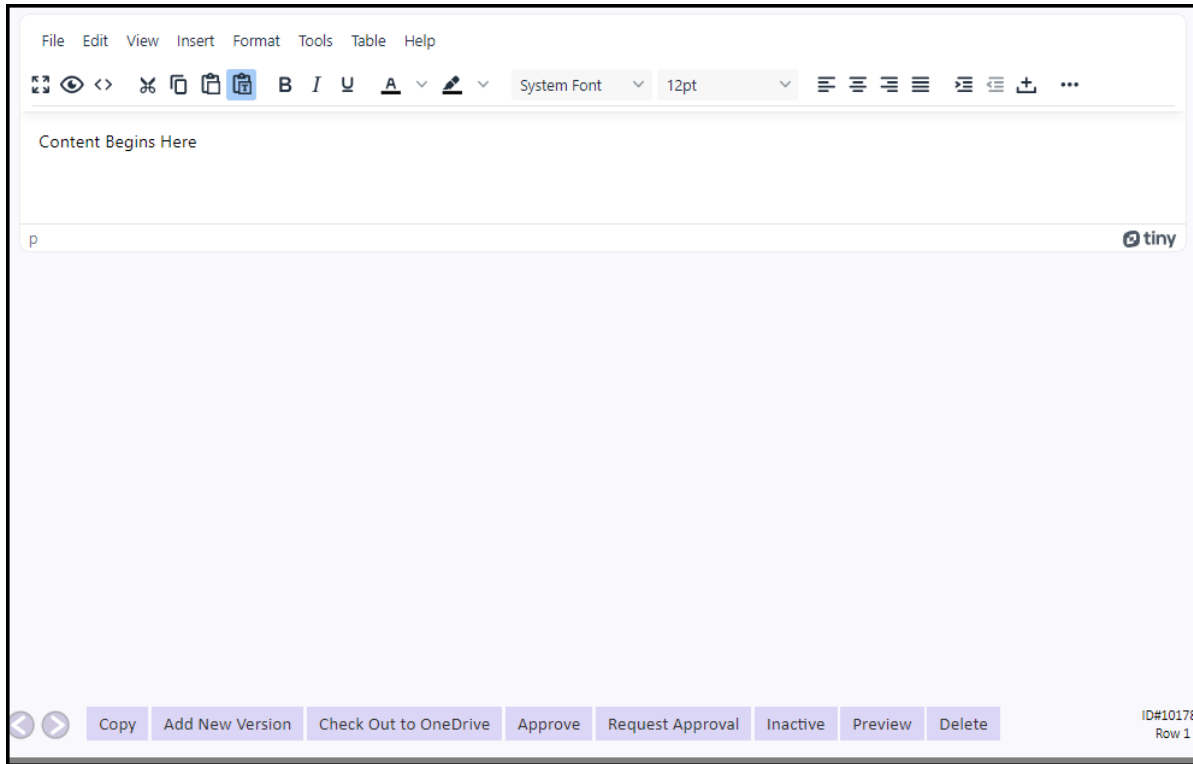
4. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.



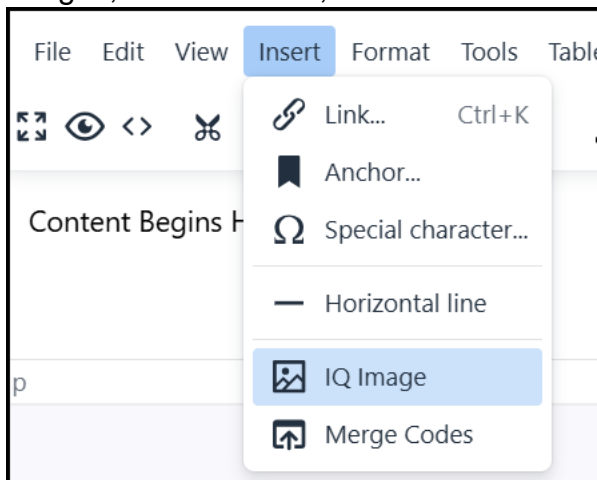
5. Select **Add to Message**. This will ensure that all correspondences that will use this Form Letter will include the issue code(s) you selected.

6. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach**.

7. Compose the content of the form letter in the editor window. You can make it full screen by clicking .

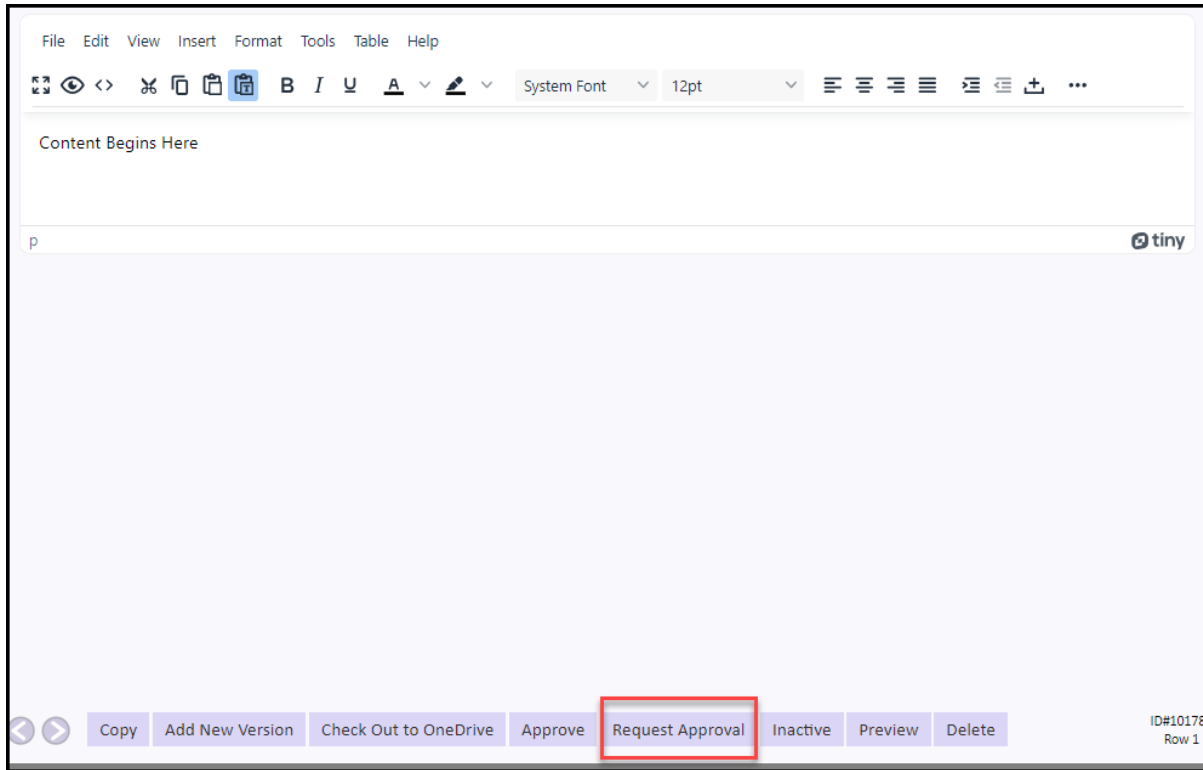


8. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, Youtube links, etc.

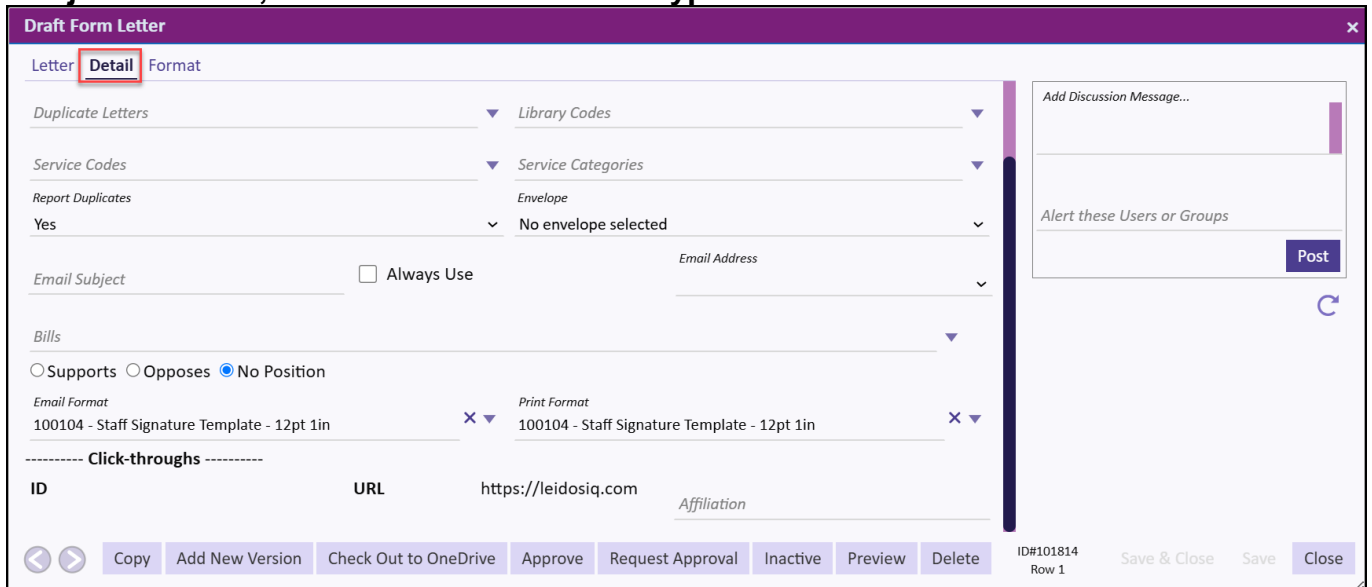


9. Click **Save**.

10. Click **Request Approval**. Then select your Form Letter Approver and click **Update**. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages while awaiting approval. Once the **Form Letter** is approved, you will be able to send the message with the approved **Form Letter**.



11. Click **Save**.
12. Click **Preview** to send an email preview or print a preview of the Form Letter.
13. Click the **Detail** panel to add additional information, including, **Review Date**, **Email Subject/Address**, and **Affiliation Codes** on **Hyperlinks** in the Form Letter.



[Top of Page](#)