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**.

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.
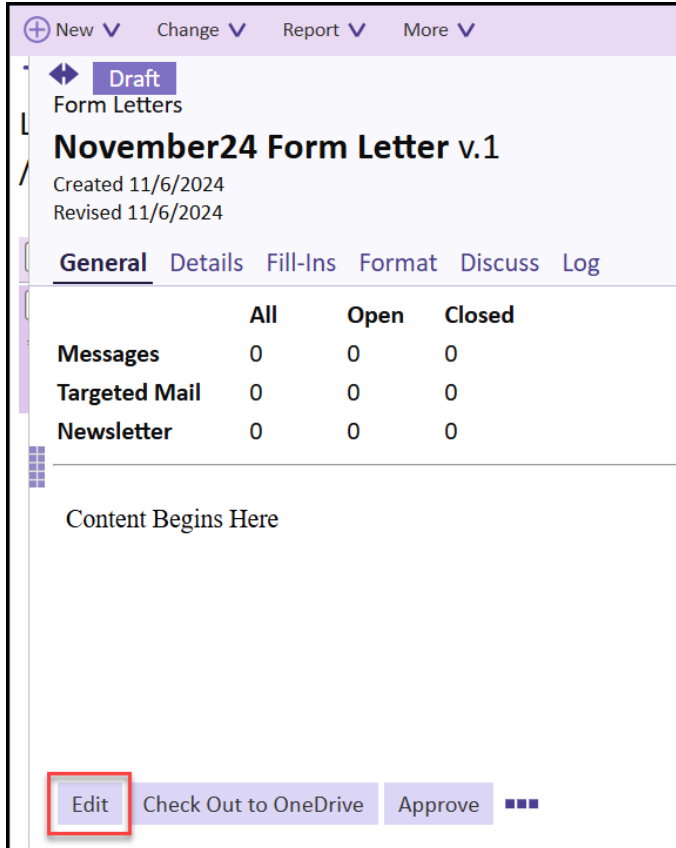

4. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.
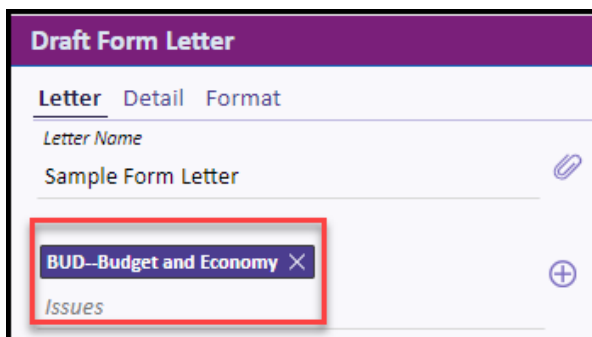
5. Select **Add to Message**. This will ensure that all correspondences that will use this Form Letter will include the issue code(s) you selected.

6. Add attachments as needed. Click the [paperclip icon]. 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 [fullscreen icon].
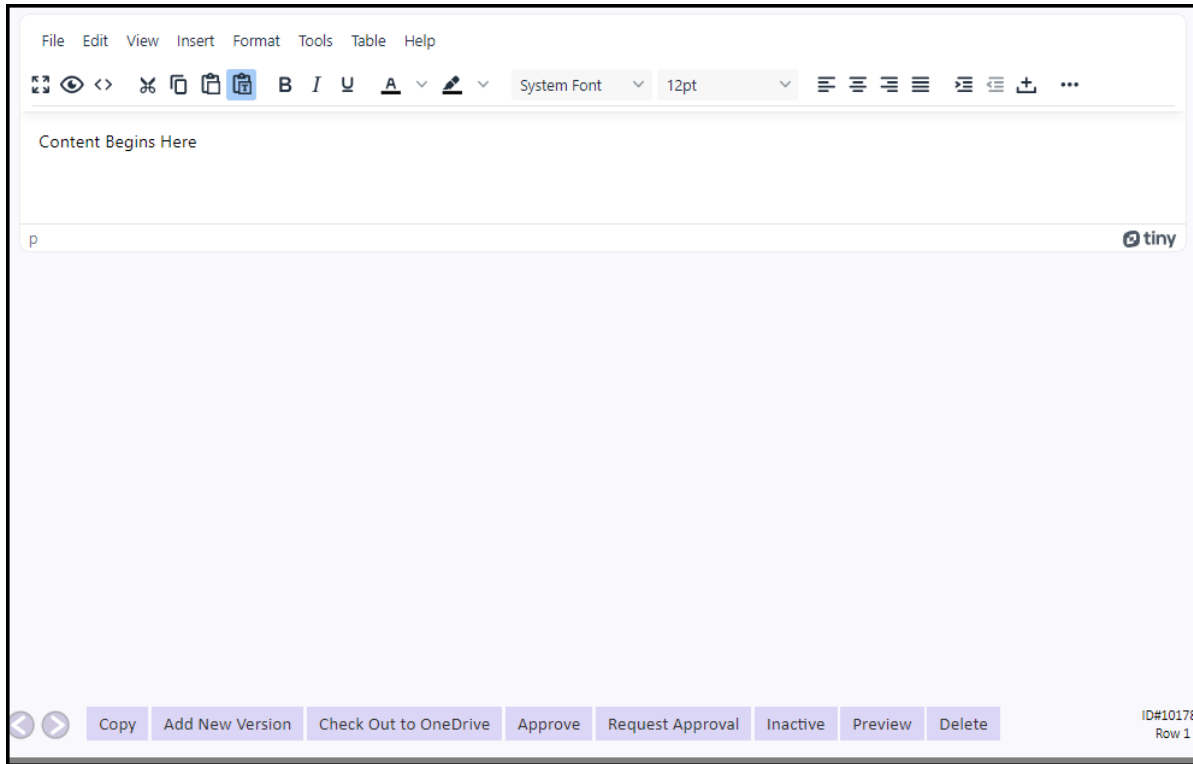
8. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, Youtube links, etc.
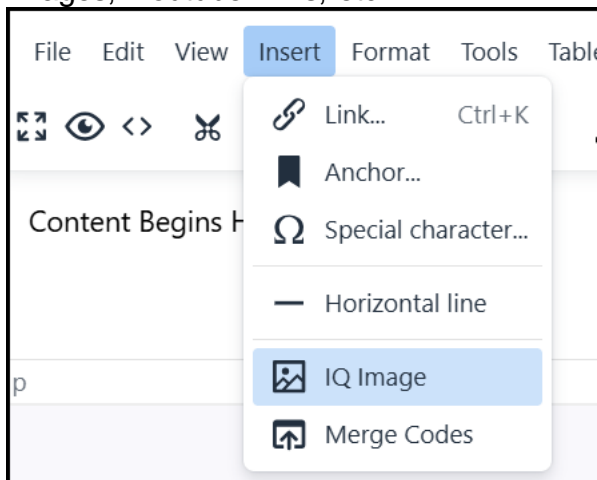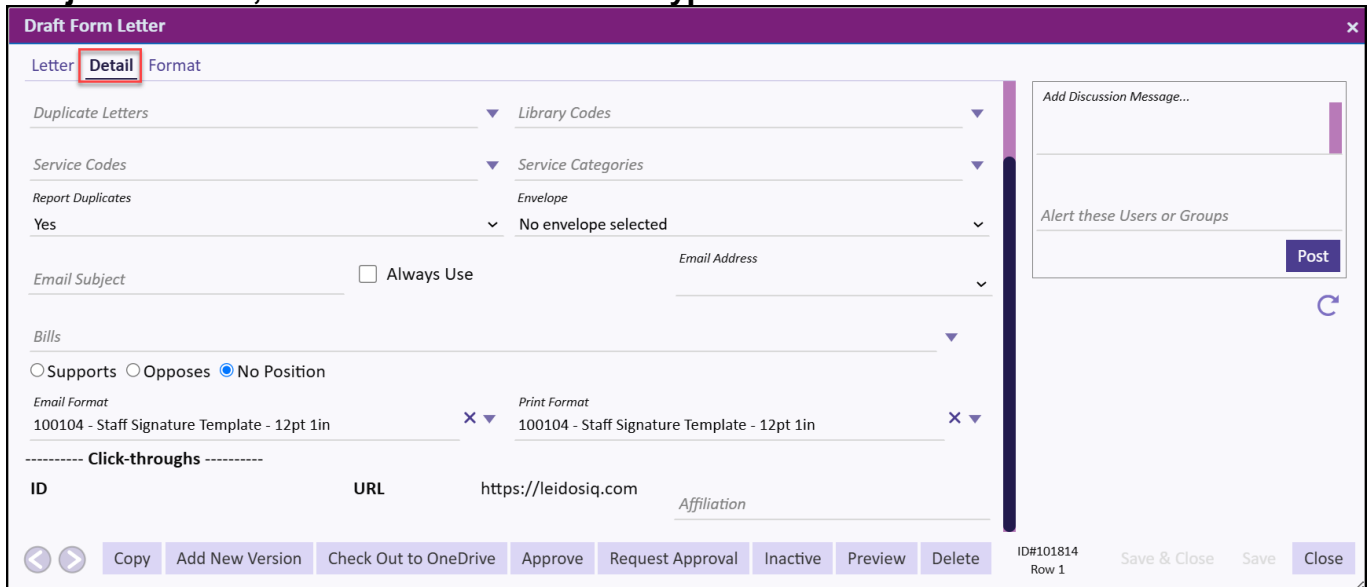

9. Click **Save**.

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**.
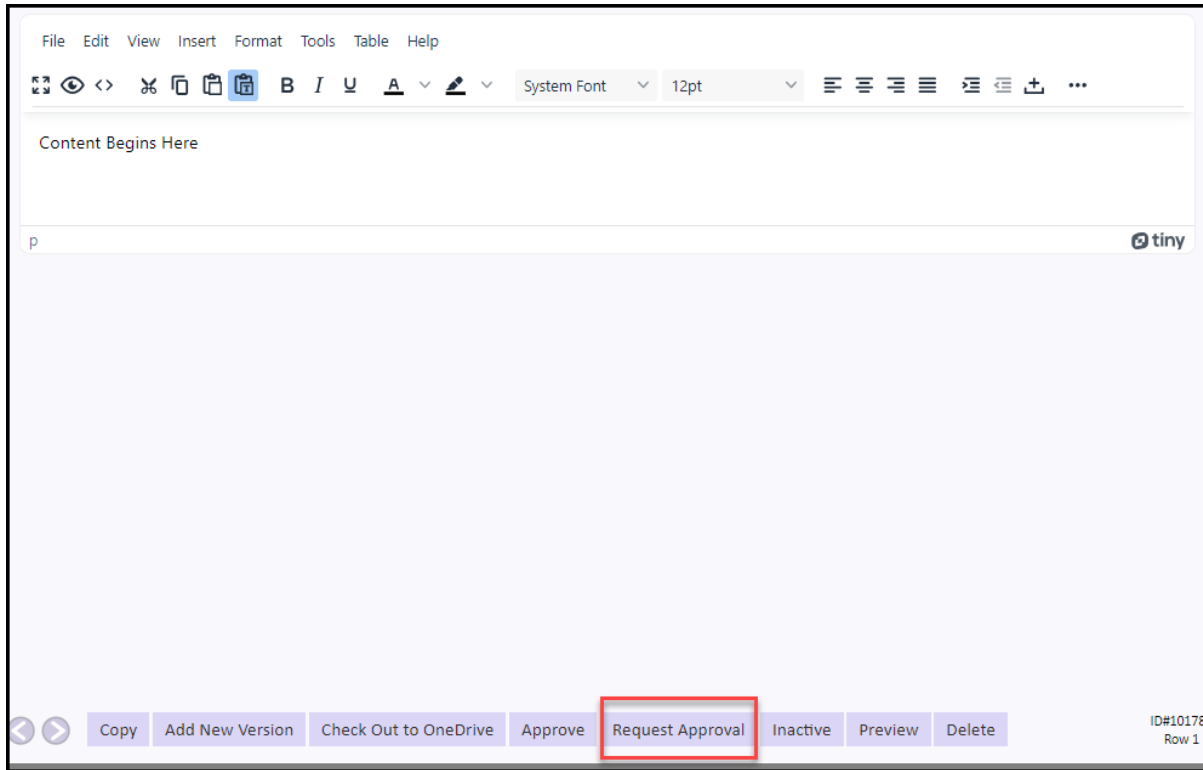
11. Click **Save**.

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.

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