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		
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Directory	Form Letters	
Format		
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		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.



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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.

Draft Form Letter	
Letter Detail Format	
Letter Name	
Sample Form Letter	Form Letter O Form Letter Template
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Issues	

6. Add attachments as needed. Click the *Letter*. 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**.

Add new attack	nment	×
Select File(s)	1 file(s) added.	1
A Sample Attach	ment.docx 💼	
IQ Library File		
	Attach Cancel	

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.

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9. Click Save.

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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**.

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- 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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