Batching Messages in IQ5

Market: Federal/State/Local, House, Senate

Description: Mail that comes into IQ that is not sorted as a **Bill Related Message** or a **Campaign Message** is considered an **Individual** Message. These individual messages can either be placed into **Batches** or can be responded to one at a time. To optimize the correspondence for these individual messages, the best practice is to **Batch** individual messages that have common attributes (i.e., issues) and reply to all using a **Form Letter**.

These instructions teach users how to find and Batch Individual Messages assigned to a user in IQ. For instructions on how to send responses to messages, see the **Replying to Emails or Printing** Letters guides.

Batching with the Finder Tool

- 1. Using the My Work Summary tile on the Homepage, click on My Open Unbatched Messages.
 - a. *Note: If you do not have the My Work Summary tile, scroll to the bottom of your homepage and click on the Add Tile button to find/add it.



2. Select all of the Messages \rightarrow Click on Finder.



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- **3.** Choose a percent similarity for IQ to search for amongst all of the selected **emails**.
- 4. Click on Find Campaigns.
- **5.** IQ has now looked through all the emails in the selected list and found potential "campaigns" that can be batched, as well as separated out the individual emails that did not meet the chosen criteria. Click on **Explore Campaigns.**



6. Click on a found campaign and read the sample Subject and Message. Once the topic of the campaign is understood, click on **Batch**.

| \equiv | Ð | Adhoc Campaign Y Find | Filter Result | | | | | 0 () |
|-----------|-------------------------|--|---------------|-----------|------|----------|---------------------|--|
| \bowtie | ÷ | Batch Change Data and Status | | | | | | Row 1 - ID campaign_10001 |
| Ħ | $\overline{\mathbf{T}}$ | Adhoc Campaign (Total 13) 🕫 | | | | By | Campaign ID (Asc) 🗸 | ↔ 🖄 🖄 |
| Q | | Campaign Name | Created | Latest | Open | No Batch | Total | People should stop using their |
| | #1 | Borne public speakerphone use! | 3/21/2023 | 3/21/2023 | 1999 | 1999 | 1999 | SPEAKERPHONE in public places! |
| * | #2 | Is climate change causing wildfires? | 7/30/2023 | 7/30/2023 | 1999 | 1999 | 1999 | Batches Unbatched(1999) |
| °° •0 | #3 | We demand affordable health care now! | 6/30/2024 | 6/30/2024 | 999 | 999 | 999 | Responses 1999 open messages are not assigned a |
| ⊚⁺ | #4 | Let's End Homelessness Together | 6/21/2024 | 6/21/2024 | 500 | 500 | 500 | response Sample Subject |
| | #5 | Let's End Homelessness Together | 6/21/2024 | 6/21/2024 | 500 | 500 | 500 | People should stop using their SPEAKERPHONE in public places! |
| 22 | #6 | Pass the Stimulus! | 12/8/2020 | 12/8/2020 | 497 | 497 | 497 | Sample Message |
| ø | #7 | Mars is the new frontier! | 4/16/2021 | 4/16/2021 | 45 | 45 | 45 | I am writing to you to ask assistance in regulating the use of |
| 會 | #8 | Student Loan Forgiveness: Cancel it all! | 4/8/2022 | 4/8/2022 | 16 | 16 | 16 | the cell phone speakerphone in public places. Our modern society has enough noise pollution and I feel that we don't |
| | #9 | Make healthcare more affordable! | 1/1/2021 | 1/1/2021 | 11 | 11 | 11 | need to add to it. People should also be motivated to keep their conversions private. I have been an hurse, claustere |
| | | | | | | | | Darchi Chanke Dara and Srards Seug |

7. Click into the **All Batches** dropdown to select an existing batch. If no Batch exists, click on the icon to create a new Batch.

| | Recently Used Batches | |
|-------------|---|--|
| All Batches | EQUITABLE EDUCATION (0) - Jonathan Kilgore - has rule | |
| | | |
| sues | | |
| | | |
| | | |
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- 8. Review or Create the Batch Rules. These will determine what settings are applied to messages that go into the Batch, such as the Issue Codes, the Staffer Assigned the Messages, and what Form Letter response will be assigned.
- 9. Click Update.

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| Campaign Message Batch Update | | | | | × | | |
|---|-----|---|--|--------|--------|--|--|
| <i>Batches</i> ● All Active Unlocked ○ Remove Current | | | | | | | |
| All Batches LOCAL ECONOMY ISSUES (3291) - Jonathan Kilgore - has rule | × • | Ð | Recently Used Batches EQUITABLE EDUCATION (0) - Jonathan Kilgore - has rule | | | | |
| Response Rules 🖉 | | | | | | | |
| Issues Budget and Economy; Housing and Urban Development Assigned To Jonathan Kilgore Letter Name LOCAL ECONOMY ISSUES 8923 Autosend Rules 🖉 | | | | | | | |
| Issues | | | | | | | |
| | | | | | | | |
| | | | | Update | Cancel | | |

Batching with Filters & Key Words

1. Using the My Work Summary tile on the Homepage, click on My Open Unbatched Messages.



- 2. Click on the = icon to open up the Filters.
- **3.** Click on **Filters** that will help identify Messages that are similar to each other, such as **Issue Code**, **Month In, Today's Mail, Campaign Name**, etc.

| ≡ | My Open Unbatched ∽ Find | | | | | | | | | |
|---|----------------------------|--------|---|---|--------------------------------------|----------------------|--|--|--|--|
| \bowtie | Messages | Change | ✓ Report ✓ More ✓ Batch Reassign No Rsp I | Finder Print Send | | ∂ Row 1 - ID 5042906 | | | | |
| H | Filter List 🧪 | ΞM | y Open Unbatched (Total 6,959) 🕫 | | | Sort By 🗸 🤇 | | | | |
| a | 2 Janua Cada | | Status | Contact | Outgoing | | | | | |
| | Compaign Name | | ✓ 錀 磬 @ 各 ⊟ ♥ | | | | | | | |
| <u> </u> | Campaign Status | #1 | Approved E-Mail | Captain Conor Quorum | Assigned: Jonathan Kilgore 😴 | | | | | |
| \$ | > Today's Mail | | Source: Telephone Call | 123 Main Street | Response: (copy 2) New State Form Le | etter Template - | | | | |
| | > Has Batch | | Date In: 10/15/2024 | conorquorum@takemail.com | wEditable Name Line v.1 = | | | | | |
| • A | Batch | | Issue: Budget and Economy Health For training purposes | ivensietter Subschoer, Preiers French | Salutation: FORMAL - Captain Quorun | n | | | | |
| Comments Plesse abolish Daylight Savings Time. We should get rid of daylight savings! | | | | | | | | | | |
| ă⁺. | > Age in Days | | Letter begins here. | | | | | | | |
| 6 | > Age in Business Days | | | | | | | | | |
| | Incoming Subject | #2 | Approved E-Mail | Dr. December Seven | Assigned: Jonathan Kilgore | | | | | |
| $ \square $ | > Campaign ID | | Source: Telephone Call | Manager | Response: | | | | | |
| 00 | > Latest Completed Message | | Date In: 10/14/2024 | 22 Maryland Ave | Salutation: FORMAL - Dr. Seven | | | | | |
| ă۵ | > Date In | | issue: Housing Market issues with interest rates | Rockville, MD 20850-0350 MD08 | | | | | | |
| \simeq | > Month In | | | jonathan.kilgore-2@leidos.com Eremunt Writer - Mah Volume: Neurlatter Subscriber: Very Important | | | | | | |
| Ø | > Year In | | | Prequent writer - High volume, Newsletter subscriber; Very Important Person | | | | | | |
| | > Date Out | | Comments: Concerned with rising interest rates and lack of afform | dable housing in Minnesota. | | | | | | |
| <u> </u> | > Month Out | | | | | | | | | |
| | > Date Email Viewed | #3 | Approved E-Mail | Massie | Assigned: Jonathan Kilgore | | | | | |
| | > Month Email Viewed | | Source: Telephone Call | Incomplete Address | Response: | | | | | |
| | > Is CWC | | Date In: 10/10/2024 | | Salutation: FORMAL - Maggie | | | | | |
| | > Delivery Agent | | Issue: Issues with interest rates | | | | | | | |

- **4.** Review the Messages in the list and either:
 - a. Select all of the Messages \rightarrow Click on **Batch** \rightarrow follow steps 6-8 above.
 - b. Select only certain messages that match \rightarrow Click on **Batch** \rightarrow follow steps 6-8 above.
- 5. Use the Search Bar at the top of the page to type in Key Words that can also help to find similar Messages.
 - a. Utilize the icon for more advanced options.

