

Batching Messages in IQ5

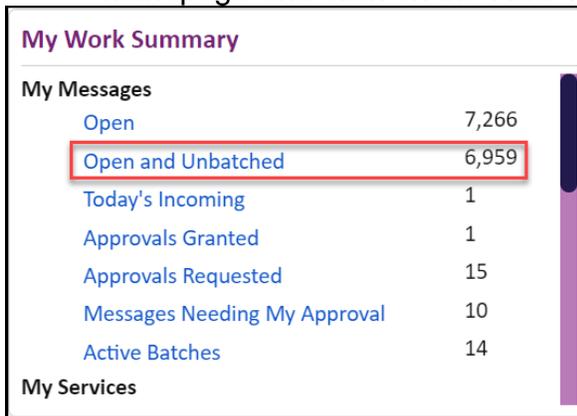
Market: Federal/State/Local, House, Senate

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**.

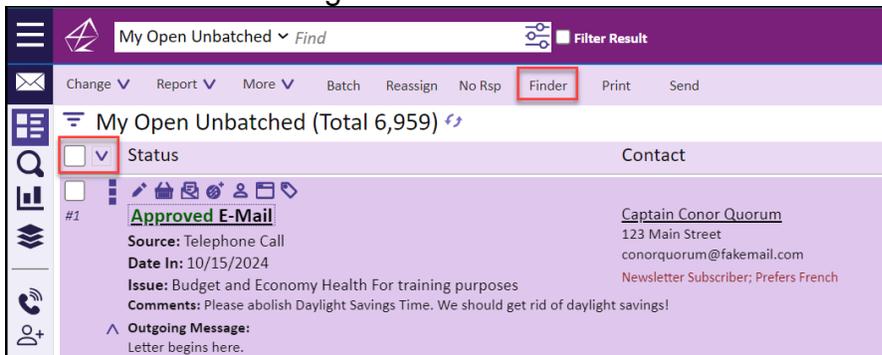
These instructions teach users how to find and Batch Individual Messages assigned to a user in IQ. For instructions on how to send responses to messages, see the **Replying to Emails or Printing Letters** guides.

Batching with the Finder Tool

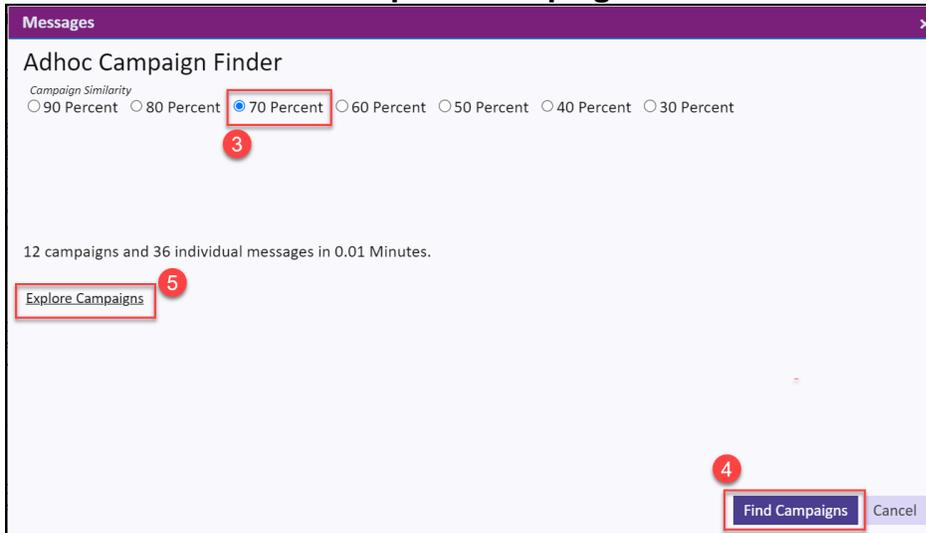
1. Using the **My Work Summary** tile on the Homepage, click on **My Open Unbatched Messages**.
 - a. ***Note:** If you do not have the My Work Summary tile, scroll to the bottom of your homepage and click on the **Add Tile** button to find/add it.



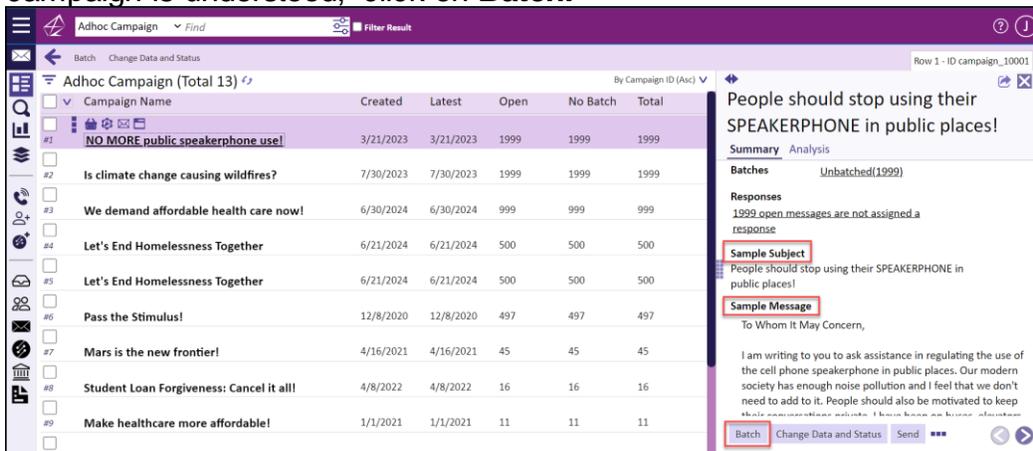
2. Select all of the Messages → Click on **Finder**.



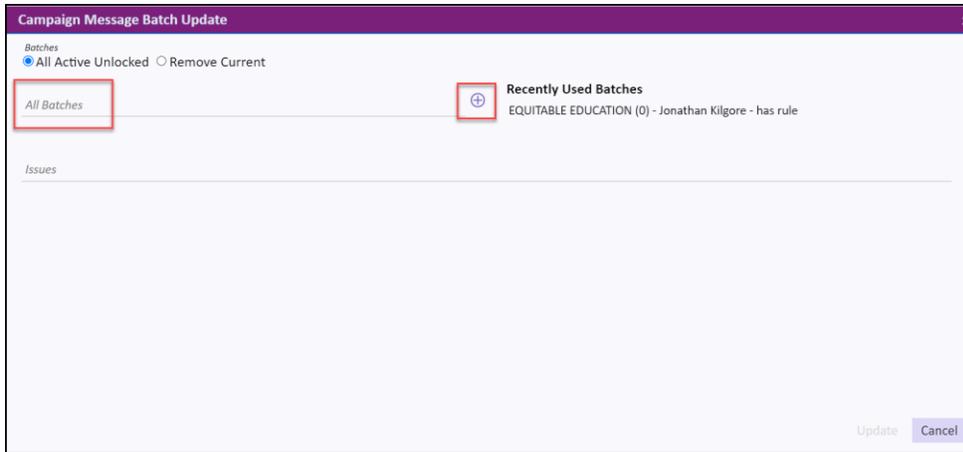
3. Choose a percent similarity for IQ to search for amongst all of the selected **emails**.
4. Click on **Find Campaigns**.
5. IQ has now looked through all the emails in the selected list and found potential “campaigns” that can be batched, as well as separated out the individual emails that did not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



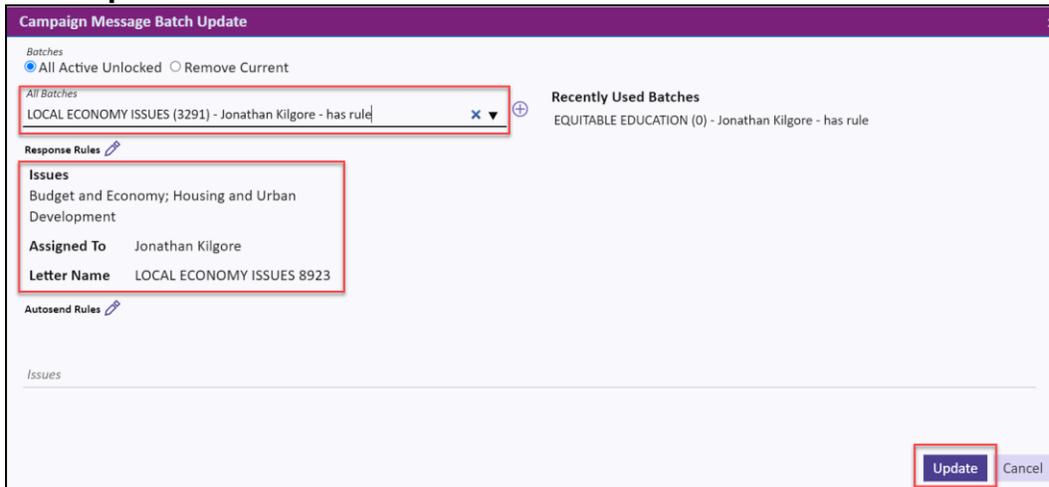
6. Click on a found campaign and read the sample Subject and Message. Once the topic of the campaign is understood, click on **Batch**.



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.



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**.

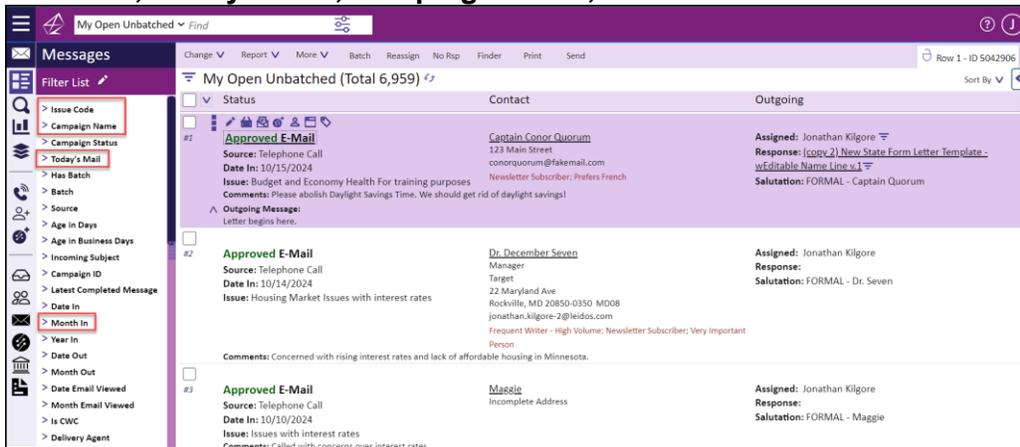


Batching with Filters & Key Words

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

My Work Summary	
My Messages	
Open	7,266
Open and Unbatched	6,959
Today's Incoming	1
Approvals Granted	1
Approvals Requested	15
Messages Needing My Approval	10
Active Batches	14
My Services	

- Click on the  icon to open up the **Filters**.
- 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.



The screenshot displays the 'My Open Unbatched' message list. On the left, a 'Filter List' sidebar is visible with several filters highlighted in red: 'Issue Code', 'Campaign Name', 'Today's Mail', 'Month In', and 'Year In'. The main content area shows a list of messages with columns for 'Status', 'Contact', and 'Outgoing'. Three messages are visible, each starting with 'Approved E-Mail' and containing details such as source, date, and issue description.

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

The screenshot displays a web-based email management interface. At the top, there is a search bar with the text "My Open Unbatched" and a "Find" button. Below the search bar, there are several action buttons: "Change", "Report", "More", "Batch", "Reassign", "No Resp", "Finder", "Print", and "Send". The "Batch" button is highlighted with a red box. The main content area shows a list of messages under the heading "My Open Unbatched (Total 6,959 / 2,512 of 2,512 Selected)". The list has columns for "Status", "Contact", and "Outgoing". Three messages are visible, each with a blue checkmark in the "Status" column. The messages are:

- #1: **Approved E-Mail**. Source: E-Mail, Date In: 12/19/2020, Issue: Environmental, Subject: Pass the Stimulus! Bill: HR.897.118. Contact: [Caseworker Kilgore](#), Incomplete Address, training@lqservicesdesk.com, OUT OF STATE. Assigned: Jonathan Kilgore, Response: [dropdown], Salutation: FORMAL - Friend.
- #2: **Approved E-Mail**. Source: E-Mail, Date In: 12/26/2020, Issue: Environmental, Subject: Pass the Stimulus! Bill: HR.897.118. Contact: [Jill C. Tyson](#), Assistant Director of Congressional Affairs, U.S. Department of Justice, Federal Bureau of Investigation, 935 Pennsylvania Ave NW, Room 7240, Washington, WA 20535-0001 DC01, training@lqservicesdesk.com, OUT OF STATE. Assigned: Jonathan Kilgore, Response: [dropdown], Salutation: FORMAL - Jill.
- #3: **Approved E-Mail**. Source: E-Mail, Date In: 12/23/2020, Issue: Environmental, Subject: Pass the Stimulus! Bill: HR.897.118. Contact: [Lori Zeoli](#), Incomplete Address, Lori.Zeoli@leidos.com. Assigned: Jonathan Kilgore, Response: [dropdown], Salutation: FORMAL - Friend.