

Sending a Message via a Service Record

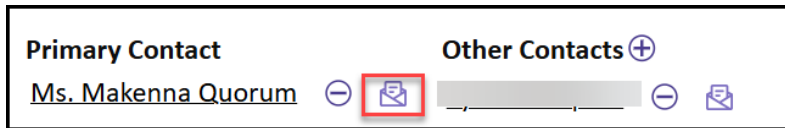
Market: House, Senate

Description: Within the Services module, users can email and respond to the constituents via Form Letter or a customized response. These instructions teach users how to create and send these messages.

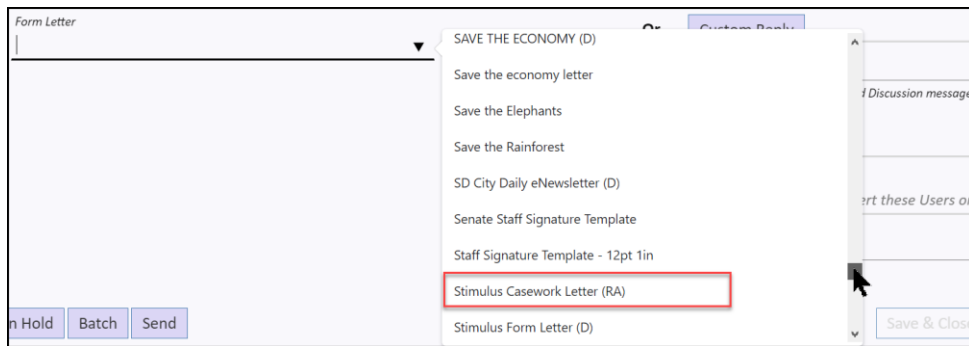
A best practice when responding to a constituent associated with a service record is to first attach a contact record to the service record first prior to sending an email.

Sending a Message

1. Open an active service record.
2. Select the envelope icon next to the Primary or Other Contacts.



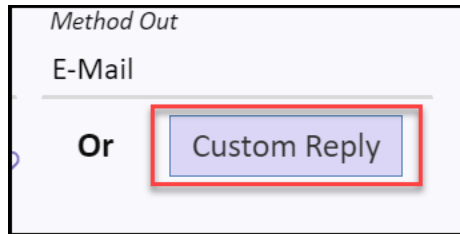
3. Select the option to respond to the constituent.
 - a. **Option - Form Letter**
 - i. Complete all necessary fields.
 - ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.




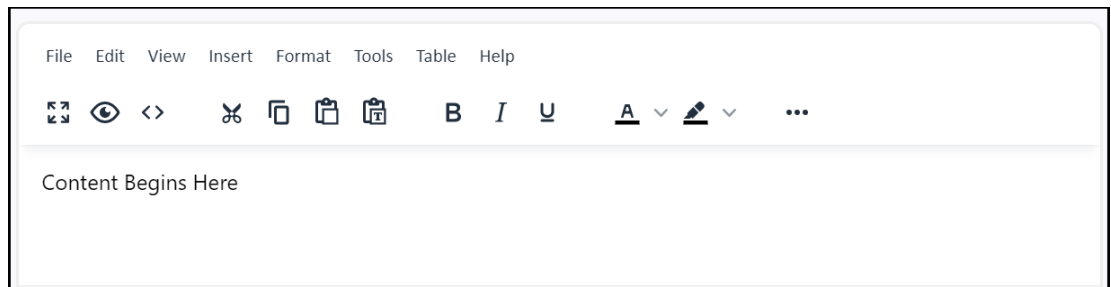
- iii. Select **Send**. (If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

b. **Option - Custom Reply**

- i. Click the **Custom Reply** button.



- ii. Use the content editor to type the custom reply. (To utilize the full screen option for the editor, click the ).



- iii. Select **Send**. (You may need approval for the custom reply. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

Sending a Quick Message

1. Click on **Send Email** next to **Activity** on the right-hand side of your Service.
2. Fill in the fields and choose a **Form Letter** or write a **Custom Message** in the space below.
3. Choose **More Message Options** to see the full Message Sending screen.
4. Click **Send Email** to send the Message.


Activity **Send Email** Discuss ✕

From
"Office of Congressman John Quorum" DistrictServices@training.In ▾

To ▾

Cc

Subject

Form Letter ▾ 

Customized Message

More Message Options Send Email

[Top of Page](#)