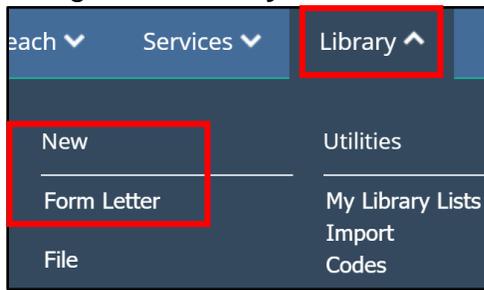


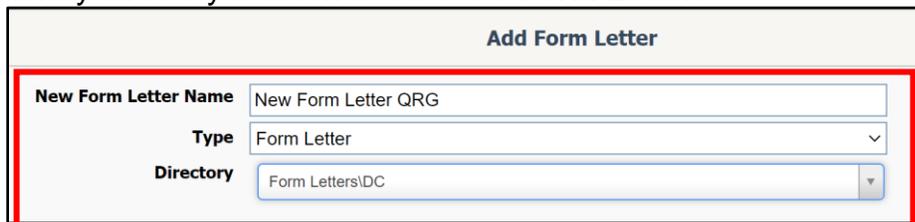
Creating a Form Letter

Market: Federal/State/Local, House, Senate

1. Navigate to Library > New > Form Letter.



2. Enter the title for your new Form Letter. Confirm that Type is set to Form Letter. Select the library directory location to store the Form Letter.



3. Select your Form Letter Template and click Add.



4. 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.

Draft Form Letter -- New Form Letter QRG v. 1

General | Fill-Ins / References (0) | Format | Messages (0)

Form Letter

Name: New Form Letter QRG

Type: Form Letter [v] Email View Printed View

Issues: × BUD - Budget and Economy [x] + Add to Message

5. Click **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 -- New Form Letter QRG v. 1

General | Fill-Ins / References (0) | Format | Messages (0)

Form Letter

Name: New Form Letter QRG

Type: Form Letter [v] Email View Printed View

Issues: × BUD - Budget and Economy [x] + Add to Message

6. Add attachments as needed. Drag and drop the file from your computer or select the paperclip icon to add the attachment. These attachments will automatically be included when this Form Letter is used.

General | Fill-Ins / References (0) | Format | Messages (0) | Log (2)

Form Letter

Name: New Form Letter QRG Draft [v]

Type: Form Letter [v] Email View Printed View Assignable

Issues: Select issues ... [x] + Add to Message View

Attachments: [paperclip icon] Edit Content

7. Click **Edit Content** to open the HTML editor. Type in the body of the Form Letter. A Best Practice when pasting information into the HTML editor is to strip any formatting by clicking this



The screenshot shows the 'Form Letter' configuration page with tabs for General, Fill-Ins / References (0), Format, Messages (0), and Log (2). The 'Form Letter' title is centered. Fields include Name (New Form Letter QRG), Type (Form Letter), and Issues (Select issues ...). On the right, there are buttons for Assignable, View, and Edit Content (highlighted with a red box). Other buttons include Email View and Printed View.

The screenshot shows the HTML editor interface. At the top, it says 'MAIL.DATE_ON_LETTER_FOR_PRINTING.MERGE'. Below that is a salutation: 'Dear newsletter.salutation_for_merging.merge,'. A rich text toolbar is visible with various icons; the 'strip formatting' icon (a paintbrush with a slash) is highlighted with a red box. Below the toolbar is a large text area containing 'Content Begins Here', which is also highlighted with a red box. At the bottom, there are 'Design' and 'HTML' tabs. The text 'Sincerely,' and merge fields 'MAIL.AIDE_FULLNAME.MERGE' and 'MAIL.AIDE_PREFERREDADDRESS_TITLE.MERGE' are visible at the bottom of the editor.

8. Click **Save**.

The screenshot shows the HTML editor interface with the text 'Thanks for reaching out! We will be in touch shortly to help you with your issue.' in the text area. Below the text area are 'Design' and 'HTML' tabs. At the bottom of the editor, the 'Save' button is highlighted with a red box, next to a 'Cancel' button.

- Change the **Status** of the Form Letter from **Draft** to **Request Approval**. Then select your Form Letter Approver. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages, campaigns, and bills while awaiting approval. Once the **Form Letter** is approved, you will be able to send the message with the approved **Form Letter**.

The screenshot shows the 'Form Letter' configuration interface. On the right side, there are three dropdown menus: the first is set to 'Request Approval', the second is set to 'Lori Zeoli', and the third is 'Assignable' with a checked checkbox. These three elements are enclosed in a red rectangular box. Below these are buttons for 'View' and 'Edit Content'. On the left side, there are buttons for 'Email View' and 'Printed View', and an 'Add to Message' button.

- Click **Save**.

This screenshot shows the same 'Form Letter' configuration interface as the previous one, but now the 'Save' button at the bottom is highlighted with a red box. The 'Assignable' checkbox remains checked. The interface also shows a 'PRINTING/MERGE' button to the left of the 'Save' button.