

Requesting and Granting Approval of a Customized Message

Market: Federal/State/Local, House, Senate

Description: In IQ, customize messages may require additional approval. Approvers are notified via alerts regarding requested approvals and requesters can track the status of their requested message approvals.

Requesting Approval for an Individual Message

1. Open the message record.
2. Select **Request Approval** for the **Status**. Select an approver.

The screenshot shows a 'Message' form with the following fields:

- Outgoing:** E-Mail
- From:** "Congressman John Quorum" <iq.training@training.lmhostediq.com>
- Status:** Request Approval (highlighted in red)
- By:** Brian Meredith (highlighted in red)

Viewing list of Messages that need approval

IQ will send an alert in IQ (and in MS Outlook, if configured) to the approver regarding the approval of the customized letter. The approver can use these steps to view these requests.

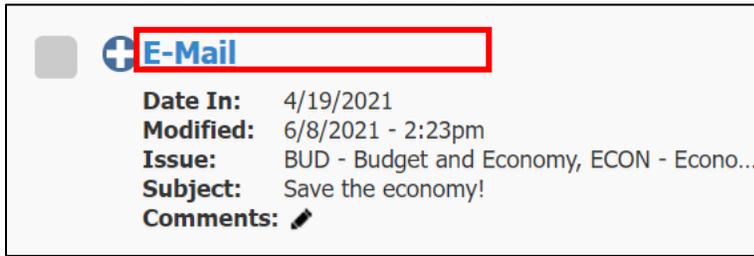
1. Navigate to **Home > My Work Summary** tile. Select **My Messages > Approval Requests**.

The screenshot shows the 'My Work' summary tile with the following data:

My Work	
My Messages	
Open	2237
Open and Unbatched	2089
Approval Requests	11
Active Batches	12
Open Outreach	1

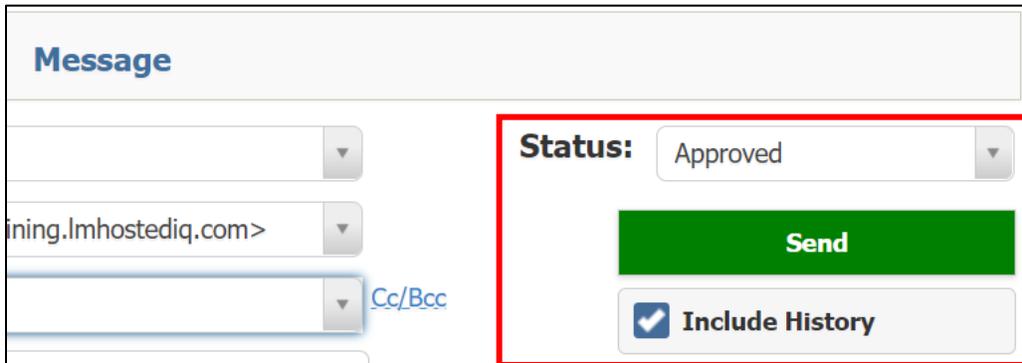
Granting Approval for Customized Messages

1. On the **My Approval Requests** page, select the Message to approve.



A screenshot of an approval request card. The card has a grey square icon on the left and a blue plus sign followed by the text "E-Mail" in a red-bordered box. Below this, the following information is listed: "Date In: 4/19/2021", "Modified: 6/8/2021 - 2:23pm", "Issue: BUD - Budget and Economy, ECON - Econo...", "Subject: Save the economy!", and "Comments: [pencil icon]".

2. On the Message page, select **Approve**. Click **Send**. Click **Include History** to include historical data and attachments associated with the initial message.



A screenshot of a "Message" page. The page title is "Message". On the right side, there is a red-bordered box containing the following controls: "Status:" followed by a dropdown menu showing "Approved", a green "Send" button, and a checkbox labeled "Include History" which is checked. On the left side of the page, there are several input fields, including one with the text "ning.lmhostediq.com>" and a "Cc/Bcc" link.