

Batching Messages

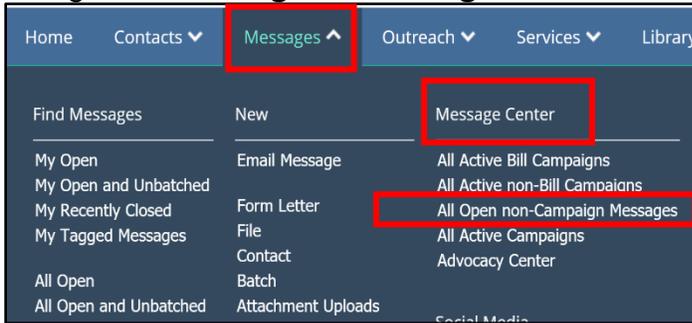
Market: House, Senate, Federal/State/Local

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**.

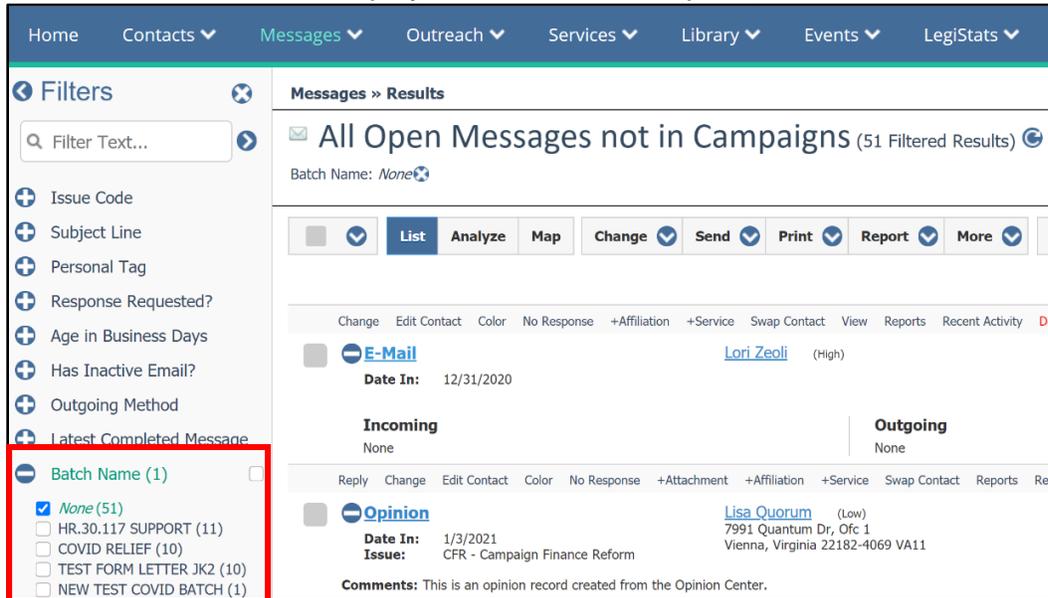
These instructions teach users how to find and manage Bill Related Messages in IQ. For instructions on how to send responses to messages, see **Sending Messages**.

Creating a Batch

1. Navigate to **Messages > Message Center > All Open Non-Campaign Messages**.

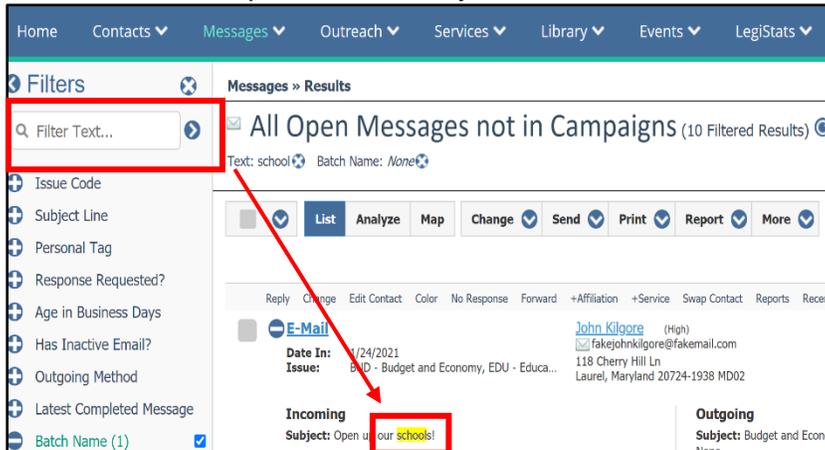


2. The search results are displayed. In the **Filters** pane, select the **Batch Name: None**.

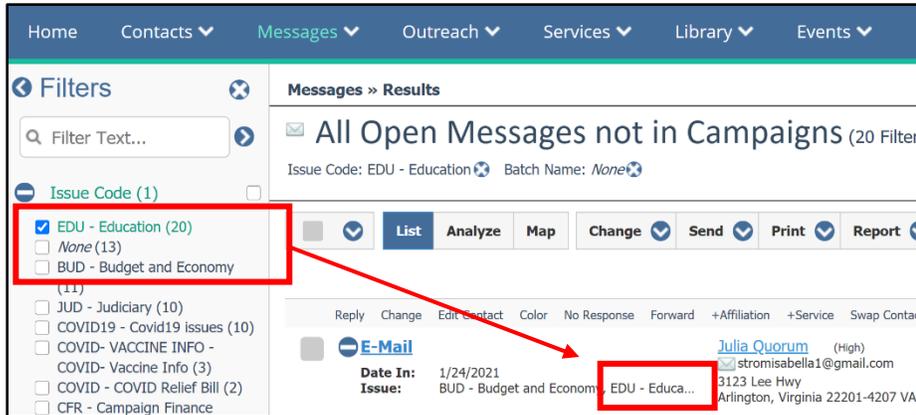


3. Use either **Filter Text**, **Issue Code**, or **Subject Line** to find records that share these attributes.

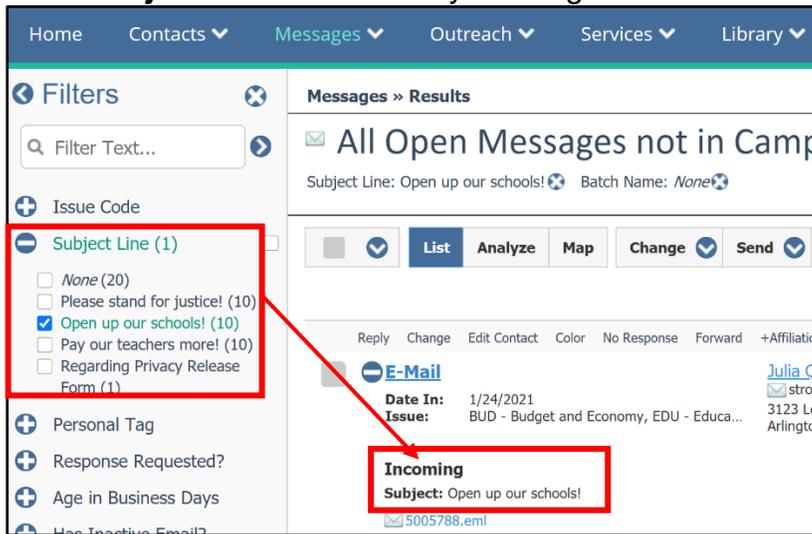
a. The **Filter Text** option runs a keyword search.



b. The **Issue Code** filter allows you to sort by messages that have already been tagged with issue codes.



c. The **Subject Line** filter sorts by messages with identical email subject lines.



4. Click the box to select all the records. In IQ, this is the check box to the left of **List**. Select **Change > Data**.

Home Contacts Messages Outreach Services Library Events LegiStats Admin

Filters

Messages » Results

All Open Messages not in Campaigns (10 of 10 Filtered Records Selected)

Subject Line: Open up our schools! Batch Name: None

Issue Code

Subject Line (1)

None (20)

Please stand for justice! (10)

Open up our schools! (10)

Pay our teachers more! (10)

Regarding Privacy Release Form (1)

Personal Tag

Response Requested?

Age in Business Days

List Analyze Map Change Send Print Report More Sort: Date In / Date Create

Tag Data

Contact Data Color Affiliation Duplicates Status Delete

Reply Change Edit Contact Color No

E-Mail

Date In: 1/24/2021

Issue: BUD - Budget and Econ

Incoming

Subject: Open up our schools!

Outgoing

Subject: Budget and Economy

5. A best practice is to select **All Active Unlocked** before selecting **Add New** to determine if that batch name already exists. Select **Save**.

Change Data

10 of 10 individual messages may be changed.

Comments

Update if empty Remove Existing Add to existing

Issues

EDU - Education

Remove Selected Issues Remove All Other Issues Remove All Issues

Related Bill

Position Select bill ...

Assigned To

Jonathan Kilgore History

Outgoing Method

E-Mail Salutation

Letter Name

COVID Hybrid Learning K-12 v. 1 -d- New Letter Remove Letter

Batch Change

No Change All Active Unlocked My Active Unlocked Add New Remove Current Undo

Batch Name

Covid School Openings

Change Status

Complete as Duplicate if Not the Latest Duplicate in the Household and Approve the rest

Next Action

Save DupCheck Send Email Print Draft Preview Final Copy Label Envelope

Save Cancel Advanced Options

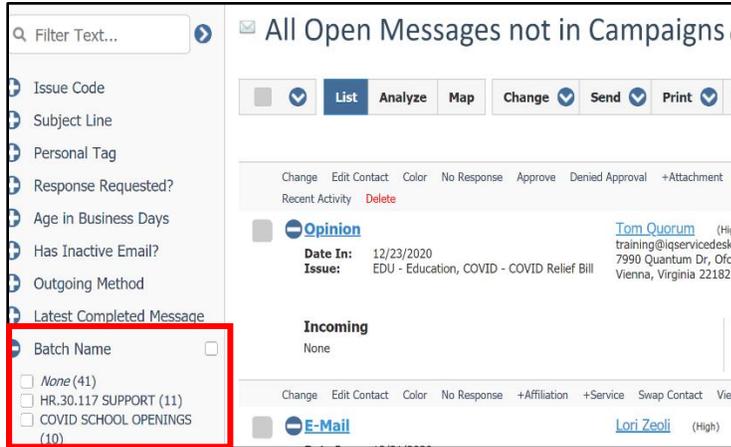
Confirm before saving

Searching for a Batch

1. There are 2 ways to find a batch.

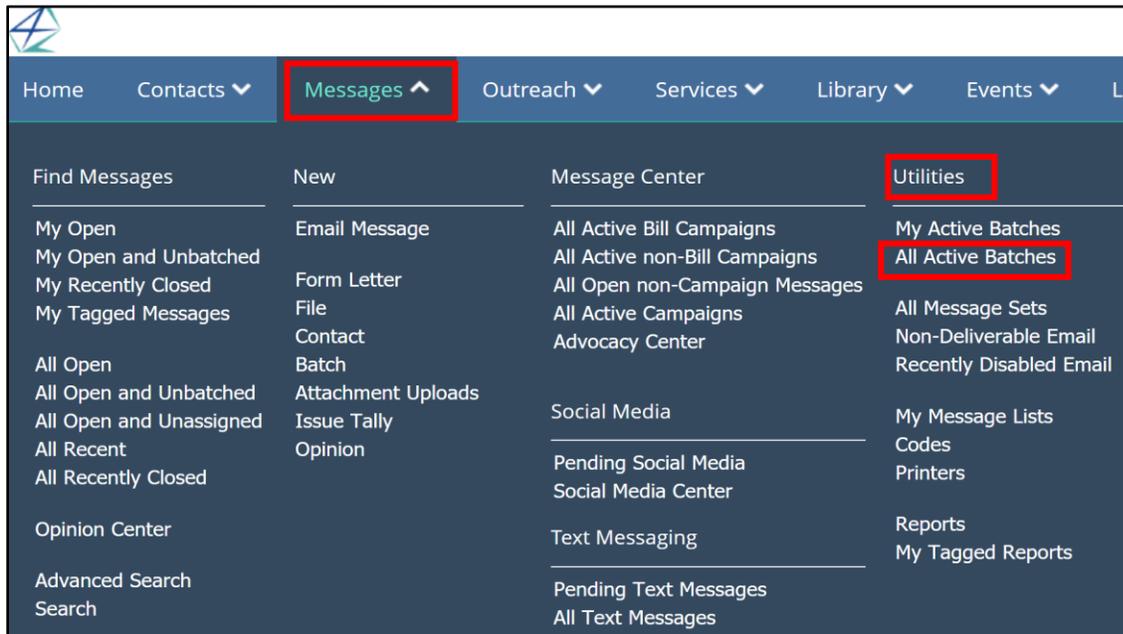
Option 1- Filter

Navigate to **Messages > Message Center > All Open Non-Campaign Messages**.
In the Filter pane, select **Batch Name** and click the batch name.



Option 2- Messages Module

Navigate to **Messages > Utilities > All Active Batches**
Click the link of the batch name.



The illustration below provides best practices on managing messages from a macro and micro level approach in IQ.

First, manage bill-related messages as this will allow you to also manage all the campaigns associated with a bill. Thus, you are reducing the number of campaign messages (which tend to have the highest volume of message records in IQ) at the same time.

Second, manage campaign messages by combining those that are similar in nature. Thus, you are reducing the number of campaigns to manage and to respond.

Finally, manage individual messages as these are the type of messages that have lower volume of records in IQ.

