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.

Home Co	ontacts 🗸	Messages 🔨	Outre	each 🗸	Services 🗸	Library		
Find Message	25	New		Message Center				
My Open My Open and Unbatched My Recently Closed My Tagged Messages		Email Message		All Active Bill Campaigns All Active non-Bill Campaigns All Open non-Campaign Messages				
		Form Letter						
		File		All Active Campaigns				
All Open All Open and Unbatched		Contact Batch Attachment Uploa	ds	Advocacy Center				
				Social M	odio			

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.

н	ome Contacts 🗸	Messages 🗸	Outreach 🗸	Sen	vices 🗸	Library	🗸 Even	ts 🗸 🛛 Le	egiStats 🗸
3	Filters 😒	Messages »	Results						
۹	Filter Text	⊠ All O Text: school 😯	pen Mes Batch Name: <i>Nor</i>	sage «🕫	s not	in Car	mpaigns	6 (10 Filtere	d Results) Ͼ
0	Issue Code								
0	Subject Line		List Analyze	Мар	Change	Send	🛇 Print 🛇	Report 📎	More 🛇
0	Personal Tag								
0	Response Requested?								
0	Age in Business Days	Reply C	Nunge Edit Contact	Color N	o Response	Forward +Af	filiation +Service	Swap Contact	Reports Recent
0	Has Inactive Email?	Date	lail In: 1/24/2021				hn Kilgore (H fakejohnkilgore@	ligh))fakemail.com	
0	Outgoing Method	Issu	ie: BID - Budgi	et and Ecor	10my, EDU - I	Educa La	urel, Maryland 20	724-1938 MD02	
0	Latest Completed Message	Inc	oming 📕	_				Outgoin	g
0	Batch Name (1)	Sub	ject: Open up our <mark>sc</mark>	hool <mark>s!</mark>				Subject:	- Budget and Econon

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

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 Covid Pilter Text All Open Messages not in Campaigns (20 Filtered Issue Code (1) Issue Code (1) EDU - Education (20) None (13) BUD - Budget and Economy Covid P - Change Edit Contact Color No Response Forward + Affiliation + Service Swap Contact Covid P - Covid Pilsues (10) Covid - VACCINE INFO - COVID - VACCINE INFO - COVID - VACCINE INFO - COVID - Covid Pelief Bill (2) CFR - Campaign Finance 	Q Filter Text Issue Code (1) Z EDU - Education (20)	All Op Issue Code: EDU	Den Mess	ages not	in Camı	oaigns	(20 Filtere
✓ EDU - Education (20) List Analyze Map Change Send Print Report C // None (13) BUD - Budget and Economy (11) JUD - Judiciary (10) COVID - Covid19 issues (10) CoviD19 - Covid19 issues (10) CoviD19 - Covid19 issues (10) CoviD - VACCINE INFO - COVID - CovID Relief Bill (2) Date In: 1/24/2021 Jasse: Julia Quorum (High) Size Hwy CFR - Campaign Finance BUD - Budget and Econom , EDU - Educa BUD - Educa Jizi Lee Hwy	✓ EDU - Education (20)						
(11) JUD - Judiciary (10) Reply Change Edit Sector Color No Response Forward +Affiliation + Service Swap Contact COVID19 - Covid19 issues (10) COVID - VACCINE INFO - Julia Quorum (High) COVID - VACCINE INFO - COVID - VACCINE INFO - Julia Quorum (Sigmail.com) COVID - VACCINE INFO - Date In: 1/24/2021 1323 Lee Hwy COVID - COVID Relief Bill (2) Issue: BUD - Budget and Econom, EDU - Educa 3123 Lee Hwy	None (13)BUD - Budget and Economy		List Analyze	Map Change (Send 🛇	Print 📎	Report 🔇
	(11) JUD - Judiciary (10) COVID19 - Covid19 issues (10) COVID- VACCINE INFO - COVID- VACCINE INFO (3) COVID - COVID Relief Bill (2) CFR - Campaign Finance) Reply Ch DE-Ma Date Issue	ange Edit Sontact (ail In: 1/24/2021 e: BUD - Budget	Color No Response F	Forward +Affiliati Julia (Stro 3123 L Arlingt	on +Service Quorum (H omisabella1@g .ee Hwy on, Virginia 22	Swap Contact Hgh) mail.com 201-4207 VA0



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



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	x EDU - Education	0	+
	Remove Selected Issues Remove All Other Issues Remove All Issues		
Related Bill	Position V Select bill	v	
Assigned To	Jonathan Kilgore x v	History	
Outgoing Method	E-Mail × × Sai	lutation 🔹 🔻	
Letter Name	COVID Hybrid Learning K-12 v. 1 -d-	New Letter Remove	Letter
Batch Change	No Change C All Active Unlocked My Active Unlocked O Add New Remove Cu	rrent 🔿 Undo	
Batch Name	Covid School Openings		
Change Status	Complete as Duplicate if Not the Latest Duplicate in the Household and Approve the rest	v	1
Next Action	Save DupCheck Send Email Print Draft Preview Final Copy Save ancel Advanced Options Confirm before sation	🔾 Label i Envelope	

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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	e link of the	batch name.						
Home	Contacts 🗸	Messages 🔨	Outre	ach 🗸	Services 🗸	Library	у ~ Е	vents 🗸
Find Mes	ssages	New		Message	Center		Utilities	
My Open My Open and Unbatched My Recently Closed My Tagged Messages All Open All Open and Unbatched		Email Message Form Letter File Contact Batch Attachment Uploads Issue Tally Opinion		All Active Bill Campaigns All Active non-Bill Campaigns All Open non-Campaign Messages All Active Campaigns			My Active Batches All Active Batches All Message Sets	
				Advocacy	Center	Non-Deliverable Er Recently Disabled My Message Lists Codes Printers		
All Open and Unassigned All Recent All Recently Closed				Pending Social Me	Social Media			
Opinion Center			Text Messaging			Reports My Tagged Report		
Advanced Search	d Search			Pending ⁻ All Text N	Text Messages Iessages			

ail mail

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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.



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