Managing Bill Messages

Market: Federal/State/Local, House, Senate

Description: Mail that is associated with a piece of legislation is automatically tagged by IQ as a **Bill Message** and are sorted by the constituent's position on the Bill (Supports, Opposes, Undecided).

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**.

1. Navigate to Legistats > Bills > Bills with Open Messages.

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Members, Votes or Actions	Bills	New	Utilities		Q Search All Legislative Actions
House Votes - Current Session	Our Bills	Legislative Action	Codes		
Senate Votes - Current Session	House Bills		Reports		
Senate Votes - Prior Sessions	Recent Introductions				
Member Vote Comparison	Recent Action				
Legislative Actions	Bills with Open Messages				
Momhore - Current Congress	Demographics				
Members - Prior Congresses					
	State				
	District				

2. Click on the **Filters** and/or **Sort** options to find the Bills with Open Messages you'd like to view. A good filter to use is the **Our Bills** filter, which will show only those Bills that your Member has sponsored or co-sponsored.

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3. Click on the **Bill Number** to open a new tab in Congress.gov showing you more detailed information on the Bill.

4. Click the **Messages** number outside the parentheses to view all Messages ever received for the Bill. Click the number inside the parentheses to view only the remaining Open Messages for the Bill.

5. Click the **Campaigns** number to view all the Advocacy Campaigns that have been created by IQ for this Bill.

6. Click the **Form Letters** number to view any form letters created to respond to messages for this Bill.

7. Click the Policy Area to view other bills with Open Messages related to that Policy Area.

8. Click the \bigcirc icon to expand the Bill information available. This includes detailed information on the Open Messages, Form Letters, Co-Sponsors, Related Bills, and Major Actions.

9. Click the **+Letter for Bill Supporters/Opponents** buttons to instantly create Form Letters tied to the Bill based off of the position clicked.

10. To create Messages Response Rules for the Bills Messages, click **Assign Response**.

	Assign Bill Related Response HRES.1064.116						
onstit	uents Position	602 open messages and all future messages related to this bill will have these settings applied. Supports the legislation (202 open) Opposes the legislation (210 open) Position undetermined (190 open)					
	Comments	□ Update if empty □ Remove Existing ☑ Add to existing					
13	Affiliations	Select affiliations Select issues, all other issues will be removed from the messages					
15	Assigned To	The second secon					
17 B	Letter Name Batch Change Batch Name	Select a letter No Change All Active Unlocked My Active Unlocked Add New Remove Current					

11. Click the box or boxes next to the Constituents Position you are creating a response rule for. **Note**: Best practice is to create one response rule for each position (Supports, Opposes, Undetermined), but you can create a single response rule for multiple or all positions.

12. Type into the **Comments** field any comments that should be associated with these messages. Note that you can **Update if empty, Remove Existing** Comments and **Add to existing** comments by clicking those boxes below the Comments field.

13. Type into the **Affiliations** field Affiliation codes to be associated with the Contacts who sent in the Messages regarding the bill.

14. Type into the **Issues** field the Issue code(s) to be associated with the Messages regarding the bill.

15. Select an IQ User for the **Assigned To** drop down field or type in the name of the user who will be Assigned these Messages. **Note:** This field may fill in automatically if the **Issue code** selected has been assigned to a particular user.

16. Select Yes or No in the **History** drop down. Selecting Yes will include the original incoming email in the outgoing response. Leaving the field blank or selecting No will not include the original incoming email in the outgoing response.

17. Select a Form Letter to send out from the **Letter Name** drop down. You can also type in the Form Letter Name instead. **Note:** If you created the Form Letter for the Bill position using the +letter for bill supporters and/or opponents, you should be able to find the form letter by typing in the bill number.

18. Once a form letter has been selected, IQ will automatically select **Add New** in the **Batch Change** field. It will title it after the Form Letter you selected above in the **Batch Name** field, so the batch and form letter names match. **Note:** You can also choose to add the messages to an existing batch or no batch if you would like by selecting **No Change** or **All/My Active Unlocked**.

19. Click Save.

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