

## Managing Campaign Messages

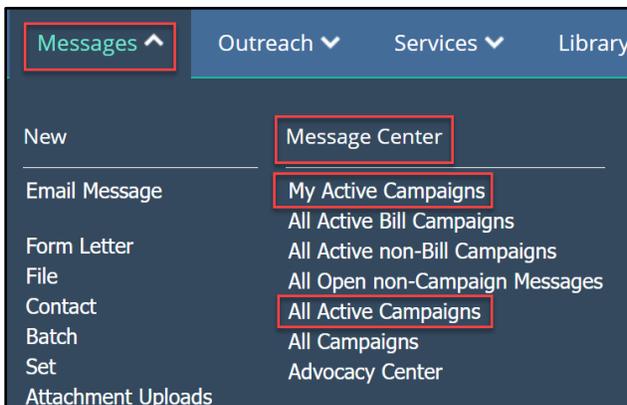
**Market:** Federal/State/Local, House, Senate

**Description:** When your Office receives volume of mail that share 70% or more common text, IQ imports and groups this mail as **Campaign** mails. In IQ, you can assign a **Form Letter** to respond to **Campaign** mail as well as assign the **Form Letter** to all subsequent Campaign Messages that are added to that Campaign. Thus, streamlining the management of Campaign mails.

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

### Locating Campaigns

1. Open the **Messages** module.
2. Click either **All Active Campaigns** or **My Active Campaigns** under the **Message Center** column.

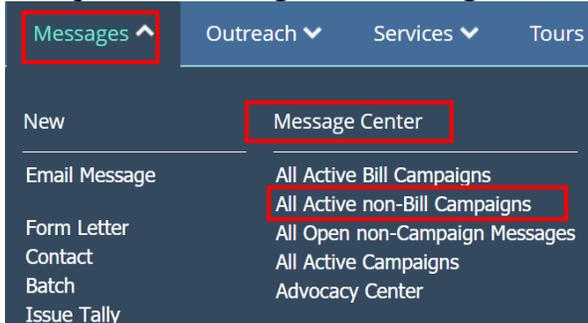


3. In the list results page of Campaign records, use the filter options on the left to further refine your search.

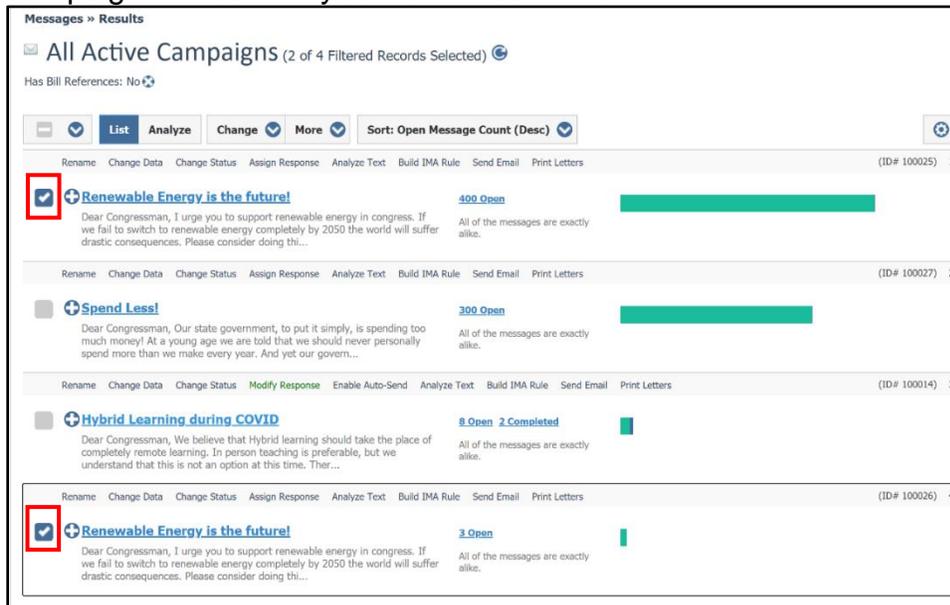
The screenshot displays the Intranet Quorum interface. At the top, there is a navigation bar with options: Home, Contacts, Messages, Outreach, Services, Library, Events, LegiStats, and Admin. A search bar and user profile (Jonathan) are also visible. On the left, a 'Filters' sidebar is highlighted with a red box, containing a search field and a list of filter categories: Message Count, Has Campaign Response, Has Open Messages, Bill Position, Has Bill References, Bill References, Has Open Unbatched Mes..., Has Open No Letter Mess..., All From Same Contact, Message Variations, Message Variation Score, and All Service Related. The main content area is titled 'Messages > Results' and shows 'All Active Campaigns (15 Results)'. It features a toolbar with buttons for List, Analyze, Change, and More, and a sort dropdown set to 'Open Message Count (Desc)'. Below this, three campaign entries are visible, each with a title, a brief description, an open message count, and a green progress bar. The entries are: 'Save the economy!' (505 Open), 'Pass the Stimulus!' (498 Open), and 'Mars is the new frontier!' (497 Open). Each entry includes a 'Dear Congressperson' salutation and a request for support. Action buttons like 'Rename', 'Change Data', 'Change Status', 'Assign Response', 'Analyze Text', 'Send Email', and 'Print Letters' are provided for each entry.

## Combining Campaigns

1. Navigate to **Messages > Message Center > All Active non-Bill Campaigns**.



2. IQ displays all your office campaigns that are not related to a bill. Click the box next to the campaign names that you want to combine.



3. Select **Change > Combine Campaigns**.

**All Active Campaigns** (2 of 4 Filtered Records Selected)

Has Bill References: No

[-] [v] **List** **Analyze** **Change** [v] **More** [v] **Sort: Open Message Count (Desc)** [v]

[Rename](#) [Change Data](#) [Change Status](#) [Assign Response](#) [Analyze Text](#) [Build IMA Rule](#) [Send Email](#) [Print Letters](#)

<input checked="" type="checkbox"/>	<b>+ Renewable Energy</b> Dear Congressman, I urge we fail to switch to renewable energy will have drastic consequences. Please consider using this...	<b>400 Open</b>
<input type="checkbox"/>	<b>+ Spend Less!</b> Dear Congressman, Our state government, to put it simply, is spending too much money! At a young age we are told that we should never personally spend more than we make every year. And yet our govern...	<b>300 Open</b>
<input type="checkbox"/>	<b>+ Hybrid Learning during COVID</b> Dear Congressman, We believe that Hybrid learning should take the place of completely remote learning. In person teaching is preferable, but we understand that this is not an option at this time. Ther...	<b>8 Open 2 Completed</b>
<input checked="" type="checkbox"/>	<b>+ Renewable Energy is the future!</b> Dear Congressman, I urge you to support renewable energy in congress. If...	<b>3 Open</b>

4. Select the campaign into which the other campaigns will combined. A best practice is to select the campaign has the most messages amongst those you are combining.

**Combine Incoming Email Campaigns**

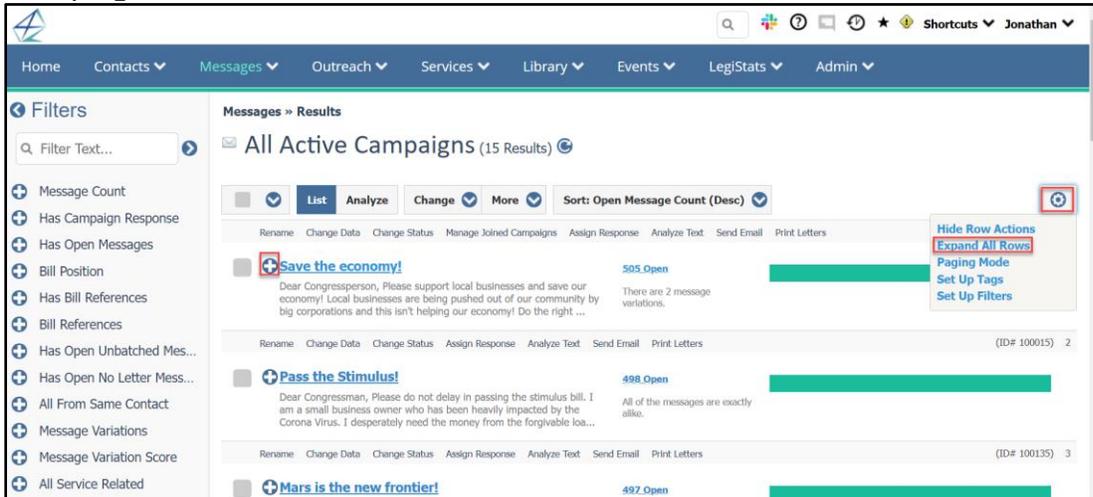
Select the 'primary' campaign below. The Campaign Response Rules for that campaign will be applied to all open messages joining this campaign.

Renewable Energy is the future! - 400 open messages - No Response Rule  
 Renewable Energy is the future! - 3 open messages - No Response Rule

5. Click **Combine Campaigns**.

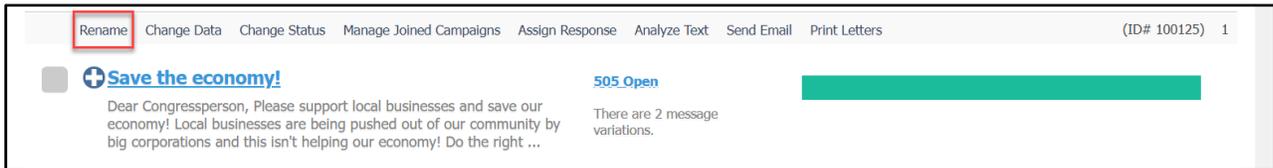
## Processing Email Campaigns

- Once you have located the Campaigns you wish to process, click the  icon to expand the Campaign. To expand all rows at once, click the  icon at the top right of the list and click **Expand All Rows**. This allows you to read the common language in the text of the Campaigns.



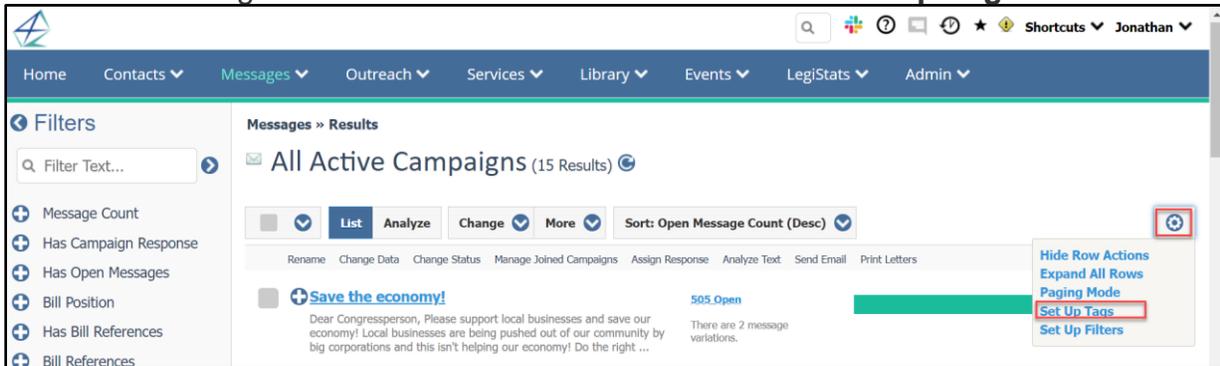
The screenshot shows the 'Messages > Results' section with 'All Active Campaigns (15 Results)'. The 'Save the economy!' campaign is selected, showing a subject line, a preview of the email content, and a '505 Open' status. A context menu is open over the campaign, with 'Expand All Rows' highlighted in red. Other campaigns like 'Pass the Stimulus!' and 'Mars is the new frontier!' are also visible in the list.

- Since IQ automatically names new incoming Campaigns based on text in the Email Subject Line, there is an option to rename the Campaign to something more meaningful. Click the **Rename** in-row action.



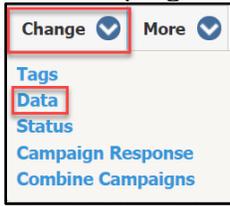
This close-up view shows the 'Rename' button highlighted in red in the row action menu for the 'Save the economy!' campaign. The campaign details, including the subject line and a preview of the email content, are visible below the action menu.

- You can create **Personal Tags** unique to Campaigns, meaning the tags will not crossover to individual Message records. Click the  icon and select **Set Up Tags** to add Personal Tags

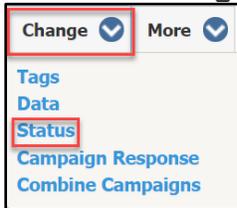


This screenshot shows the context menu for the 'Save the economy!' campaign. The 'Set Up Tags' option is highlighted in red, indicating the next step in the process of adding personal tags to the campaign.

- Click the **Change Data** action to open a dialog box with multiple options available to manage the Campaign.



- Click the **Change Status** action to manage the status of Messages inside the Campaign.



- Click the **Assign Response** action to automate multiple options for the Campaign.
- The **Analyze Text** action allows you to locate Message records in the Campaign that contain different language. Once identified, you can isolate those Message records within the Campaign and respond with a different Form Letter if you so choose.
- Once the **Assign Campaign Response** dialog is saved, the **Assign Response** in-row action changes to **Modify Response** and any new Messages which are added to the Campaign will automatically be assigned the same Issue Code, Assigned To, Form Letter and Batch. The Campaign rule can be removed by selecting the red "Remove Rule" button inside the dialog.
- Use the **Name** link to open the campaign to view and process all individual messages in the campaign.

Analyze Text Feature

- IQ displays all active campaign records that are not related to a bill. Select a campaign that has **Message Variations**. If the campaign shows **all messages are exactly alike**, there is no need to use the Analyze Text feature.

Figure 1: Campaign with text variances

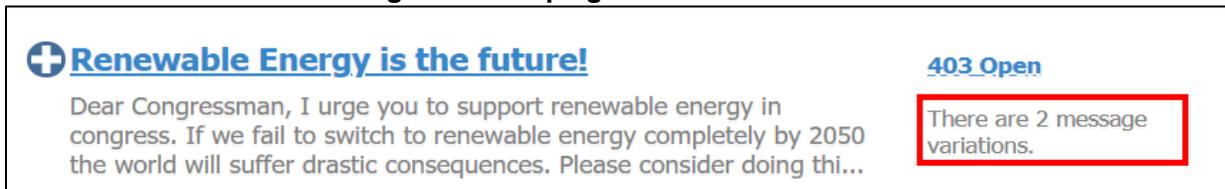


Figure 2: Campaign without text variances

**Hybrid Learning during COVID**

8 Open 2 Completed

Dear Congressman, We believe that Hybrid learning should take the place of completely remote learning. In person teaching is preferable, but we understand that this is not an option at this time. Ther...

All of the messages are exactly alike.

**2. Select Analyze Text.**

Rename Change Data Change Status Manage Joined Campaigns Assign Response **Analyze Text** Build IMA Rule Send Email Print Letters

**Renewable Energy is the future!** 403 Open

Dear Congressman, I urge you to support renewable energy in congress. If we fail to switch to renewable energy completely by 2050 the world will suffer drastic consequences. Please consider doing thi... There are 2 message variations.

**3. IQ will display the results using yellow to refer to records that have similar content and using red to refer to records that have variations.**

Frequency	Sections, Sentences, and Phrases
403	I URGE YOU TO SUPPORT RENEWABLE ENERGY IN CONGRESS
403	IF WE FAIL TO SWITCH TO RENEWABLE ENERGY COMPLETELY BY 2050 THE WORLD WILL SUFFER DRASTIC CONSEQUENCES
403	PLEASE CONSIDER DOING THIS FOR THE GOOD OF WORLD AND OUR NATION
403	THANK YOU
2	I HAVE SPECIFICALLY TALKED TO THE DEPARTMENT OF ENERGY ABOUT THIS BUT THEY HAVE YET TO RESPOND TO ME
2	CAN YOU HELP WITH THIS?

For those records with variations, click the record number to drill down into those messages. Based on the content, assess the significance of the variation to determine the best approach to address them (i.e. keep these records in the same campaign, create a new campaign for these records, etc.)

## Assign Response to Email Campaign

1. From the Messages Big Menu, select **All Active Campaigns** from the Utilities column
2. Locate the desired campaign and select **Assign Response** from the Row Action.

**Assign Campaign Response**

505 open messages and all future messages added to this campaign will have these settings applied.

**3** **Comments**

**4**

Update if empty  Remove Existing  Add to existing

**4** **Affiliations**

**5** **Issues**

**6** **Related Bill**

Position

Select bill ...

**7** **Assigned To**

Select user ...

**8** **History**

Select history ...

**9** **Letter Name**

Select a letter ...

**New Letter**

**10** **Batch Change**

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

**10** **Batch Name**

**11** **Save**

3. **Comments:** Add comments about the Messages in the campaign here.
4. **Affiliations:** Add appropriate Affiliation Codes related to Campaign.
5. **Issues:** Add issue codes to messages with similar language. If the selected Issue code has an associated staff, then the Assigned To field will be auto populated. Also, the selected Issue Code(s) will override any issue codes in the incoming emails which are added to the campaign.
6. **Related Bill:** Select from drop-down menu a Congressional Bill related to Campaign and your office's Position.
7. **Assigned To:** Select the IQ user that should be assigned to/is responsible for the existing pending Message records and any future Messages added to the Campaign.
  - a. **Note:** If the selected IQ User is suspended and replaced with another IQ User, IQ will automatically update the **Assigned To** in the Assign Campaign Response with the replacement user along with any pending Message records in the Campaign.
8. **History:** To reply with history, select yes or no

9. **Letter Name:** Assign a form letter response. If the selected Form Letter has Issue Code(s) and "Add to Message" is checked, then those Issue Codes will be added auto populated.
  - a. **Note:** Check "new letter" to create a placeholder letter for the campaign response. You can edit the letter later
10. **Batch Change:** Assign campaign messages to a batch for printing or sending out emails. The new batch will automatically be named the same as the Letter Name by default but can be changed to another name or the user can select an existing batch.
  - a. **Note:** If a new batch is created, the Owner will be the user selected in the **Assigned To** field. If a user is NOT selected, then the owner of the batch will be the IQ user who created the Assign Response
  - b. **Note:** You may also wish to select **All Active Unlocked** to explore your Offices existing and active batches and add the campaign mail there.
11. Click **Save**