

Replying to and Sending Messages

Market: Federal/State/Local, House, Senate

Description: IQ provides the flexibility to send messages from different sections of the tool. These instructions teach the users how to reply and send IQ messages using Form Letters or customized information.

Click the following links to be brought directly to the subtopic:

[*Sending a Basic Email Message*](#)

[*Sending Messages from a Contact Record*](#)

[*Sending Messages from a Batch*](#)

[*Sending Messages from a Campaign*](#)

[*Sending Messages from a Bill*](#)

[*Replying to a Message using a Form Letter*](#)

[*Replying to a Message using Custom Letter*](#)

[*Processing Messages Without a Response*](#)

[*Enabling Auto Send for Batches, Campaigns and Bills*](#)

Sending a Basic Email Message

1. Click on the **Messages** module, then click **New > Email Message**.
2. The **Send Message** window appears.

The screenshot shows a 'Send Message' dialog box. It includes a 'From' dropdown menu, a 'To' search field, a 'Cc' text field, a 'Subject' text field, and an 'Attachments' field with a paperclip icon. Below these is a large text area for the message body. At the bottom, there are 'Send', 'More', and 'Cancel' buttons.

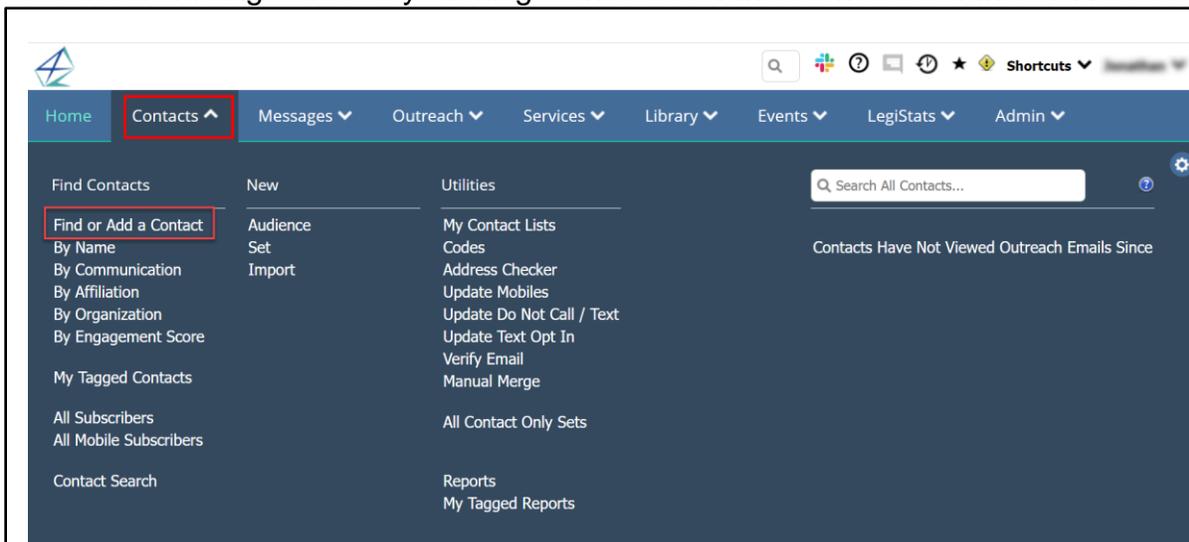
- Select the **From** email address if you wish to use a different address than the system default.
- Search for the Name, Preferred Address, Primary Home Phone, Email Address, or Contact ID in the **To:** field to locate the Contact record for the recipient of the email.
- Type up to 40 email addresses in the **CC:** field.
- Type a **Subject**.
- Click the  icon to attach documents. The expanded dialog box allows you to drag and drop files or browse files from your workstation. You can also attach files from the IQ Library.



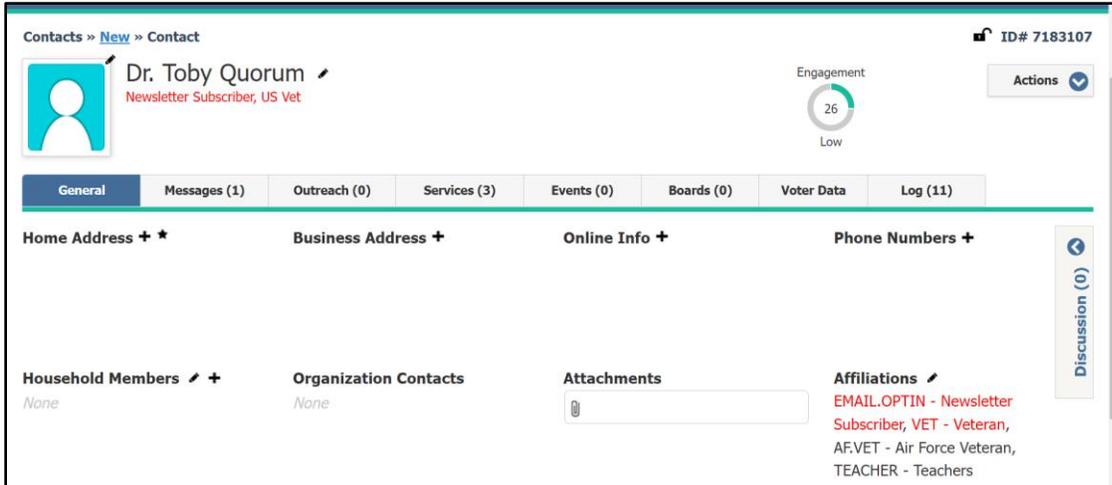
3. Type the content of the message.
4. Click the **Send** button when ready to submit.

Sending Messages from a Contact Record

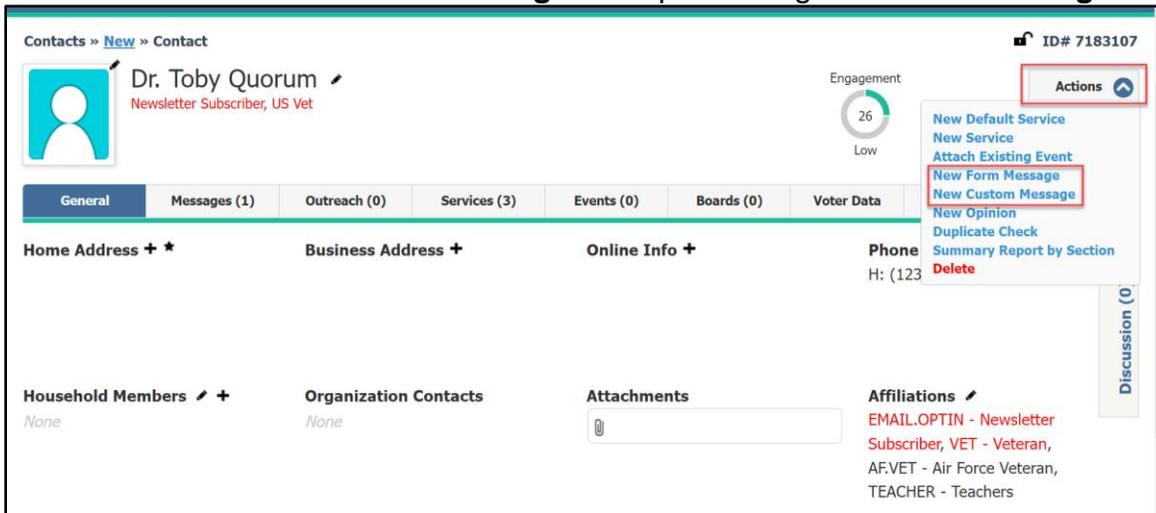
1. Search an existing contact by clicking **Contacts > Find Contacts> Find or Add a Contact**.



2. Once a contact record has been identified, expand its details by clicking the + sign.



3. Click **Actions > New Form Message** to respond using an existing **Form Letter**. Click **Actions > New Custom Message** to respond using a **Custom Message**.



4. The Message window is displayed.

Message

Outgoing: E-Mail

From: "Congressman John Quorum" <iq.training@training.lmhostediq.com>

To: TobyQ@leidos.com * Cc/Bcc

Subject:

Attachments:

Issues: Select issues ... +

Form Letter: No Letter selected 🔍 ★ 🔄

Batch: No batch selected 🔍

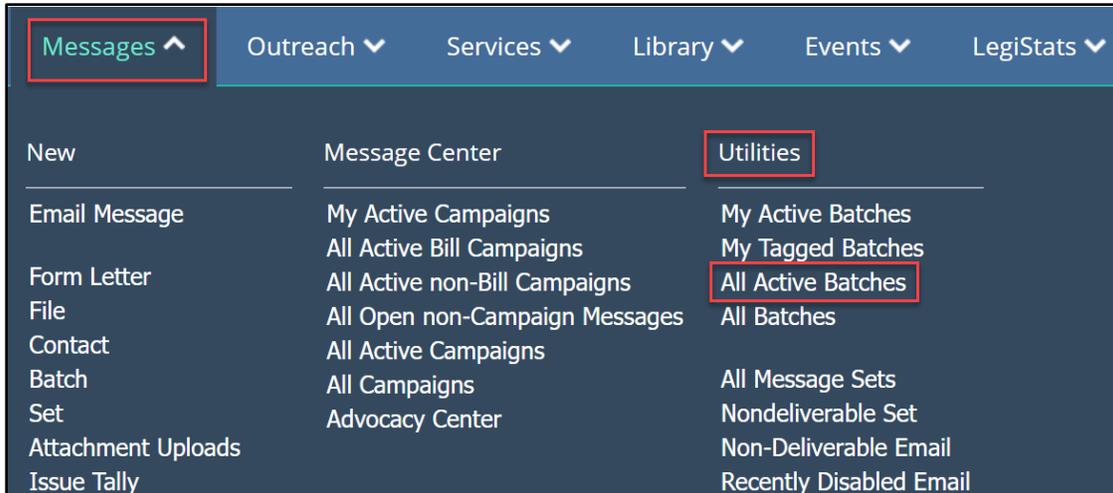
Status: On Hold

🔍 Previous Text Search... Customize

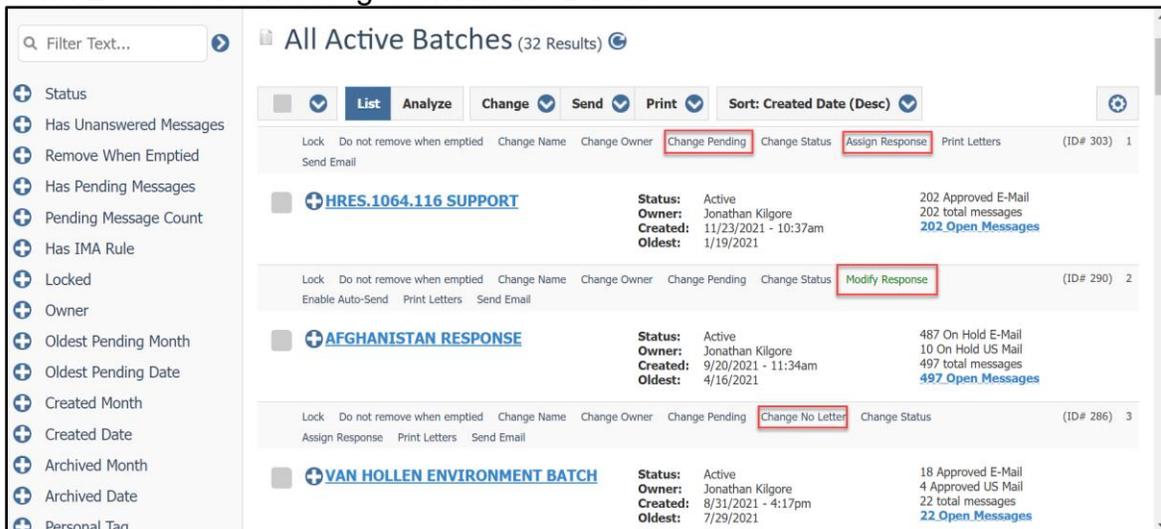
- In the Message record, select the **Outgoing** method.
- The **From** and **To** fields default from the Outgoing Method and the recipient's Contact record.
- Use the **CC/BCC** link to open options to enter CC and BCC email addresses. You can press the space bar in the CC and BCC field in the Message record and display the primary email address for the recipient's Contact record followed by the list of other email addresses in the database.
- Type a **Subject** if the message will go out by email.
- Add **Attachments** if you would like to include an outgoing file with an email. Attachments are not printed with a Message going out by Postal Mail, but it can be useful to attach the file for historical purposes.
- Enter **Issue Codes**. For non-Service-related Messages, Issue Codes can be critical. Issue Codes can be tracked for analysis. Form Letters can be assigned Issue Codes so that locating a response is much easier.
- Select a **Form Letter**. You can either begin typing text from the Form Letter name in the **Form Letter** field or use the 🔍 icon to open a list of available Form Letters sorted by Issue Code.
- Add the Message to a **Batch**. In most offices, this is the last step when assigning a Form Letter response. If you wish, you can **Send** or **Print** the letter using either the **Send** or **Print** button, however most Messages are reviewed in the Batch and printed or sent once the review is complete.

Sending Messages from a Batch

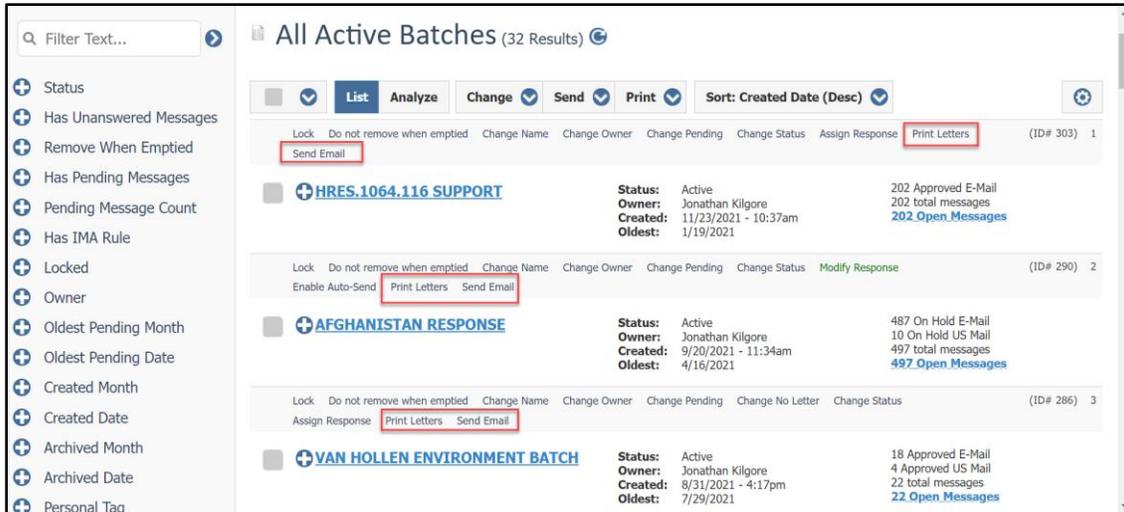
1. Click **Messages > Utilities > All Active Batches** to find the appropriate Batch.



2. Click the **Change Pending**, **Change No Letter**, or **Assign Response** button to assign a Form Letter to the messages within the Batch.

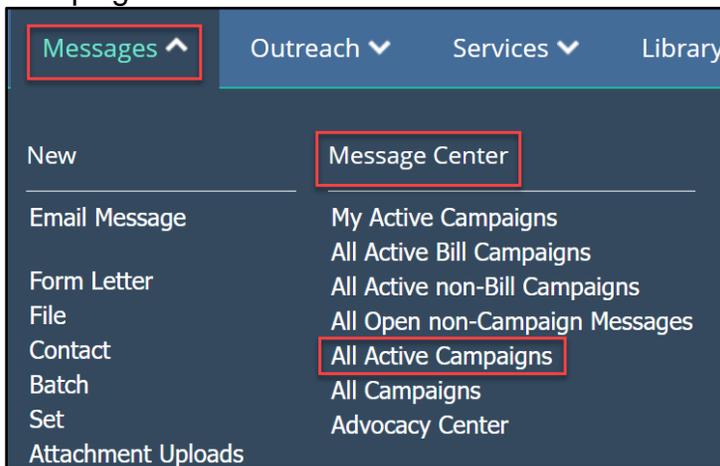


3. Click **Send Email** or **Print Letters** to send your Messages and close out the Open Messages in the Batch.

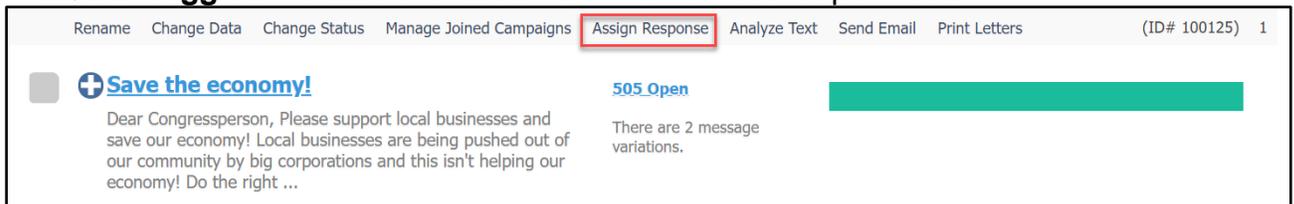


Sending Messages from a Campaign

1. Click **Messages > Message Center > All Active Campaigns** to find the appropriate Campaign.



2. Click the **Assign Response** button to create a placeholder letter to edit and send later or select an existing Form Letter.
 - a. ***Note:** If there have been campaigns similar to the one you are creating a response for, IQ will **Suggest** a form letter and issue codes based on past use.



Assign Campaign Response

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

Comments

Update if empty Remove Existing Add to existing

Affiliations

Issues

Related Bill Position

Assigned To **History**

Suggestions 100% of similar mail received the Messages Training 12_9 v.1 letter and the BUD, ECON issue codes.

Letter Name New Letter

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

Batch Name

Save **Cancel** **Less...**

3. Click **Send Email** or **Print Letters** to send your Messages and close out the Open Messages in the Campaign.

Rename Change Data Change Status Manage Joined Campaigns Modify Response Enable Auto-Send Analyze Text **Send Email** **Print Letters** (ID# 100125) 1

Save the economy! 505 Open

Dear Congressperson, Please support local businesses and save our economy! Local businesses are being pushed out of our community by big corporations and this isn't helping our economy! Do the right ... There are 2 message variations.

Sending Messages from a Bill

1. Click **Legistats > Bills > Bills with Open Messages** to find the Bills you would like to send Messages from.

The screenshot shows the LegiStats navigation menu. The 'LegiStats' menu item is expanded, and the 'Bills with Open Messages' option is highlighted with a red box. Other options in the 'Bills' sub-menu include 'Our Bills', 'House Bills', 'Senate Bills', 'Recent Introductions', 'Recent Action', and 'All Bills'.

2. Click **Assign Response** to create a placeholder letter or assign an existing Form Letter to the Open Messages.

- a. **Note:** You can assign response based off of Bill position. Please see **Bill Related Messages in IQ** to learn more.

The screenshot shows the LegiStats interface. On the left is a 'Filters' sidebar with categories like Chamber, Congress, Bill Type, etc. The main area displays 'Bills (9 Filtered Results)'. Two bills are visible: HRES 1064 and HR 30. For HRES 1064, the 'Assign Response' button is highlighted with a red box. The interface includes navigation tabs (Home, Messages, etc.), a search bar, and various action buttons for each bill entry.

The screenshot shows the 'Assign Bill Related Response HRES.1064.116' form. At the top, it states '602 open messages and all future messages related to this bill will have these settings applied.' Below this, there are three checked checkboxes for 'Constituents Position': 'Supports the legislation (202 open)', 'Opposes the legislation (210 open)', and 'Position undetermined (190 open)'. The 'Constituents Position' label is highlighted with a red box. Other fields include 'Comments', 'Affiliations', 'Issues', 'Assigned To', 'Letter Name' (highlighted with a red box), 'Batch Change', and 'Batch Name'. A 'New Letter' checkbox is also highlighted with a red box. At the bottom are 'Save', 'Cancel', and 'Less...' buttons.

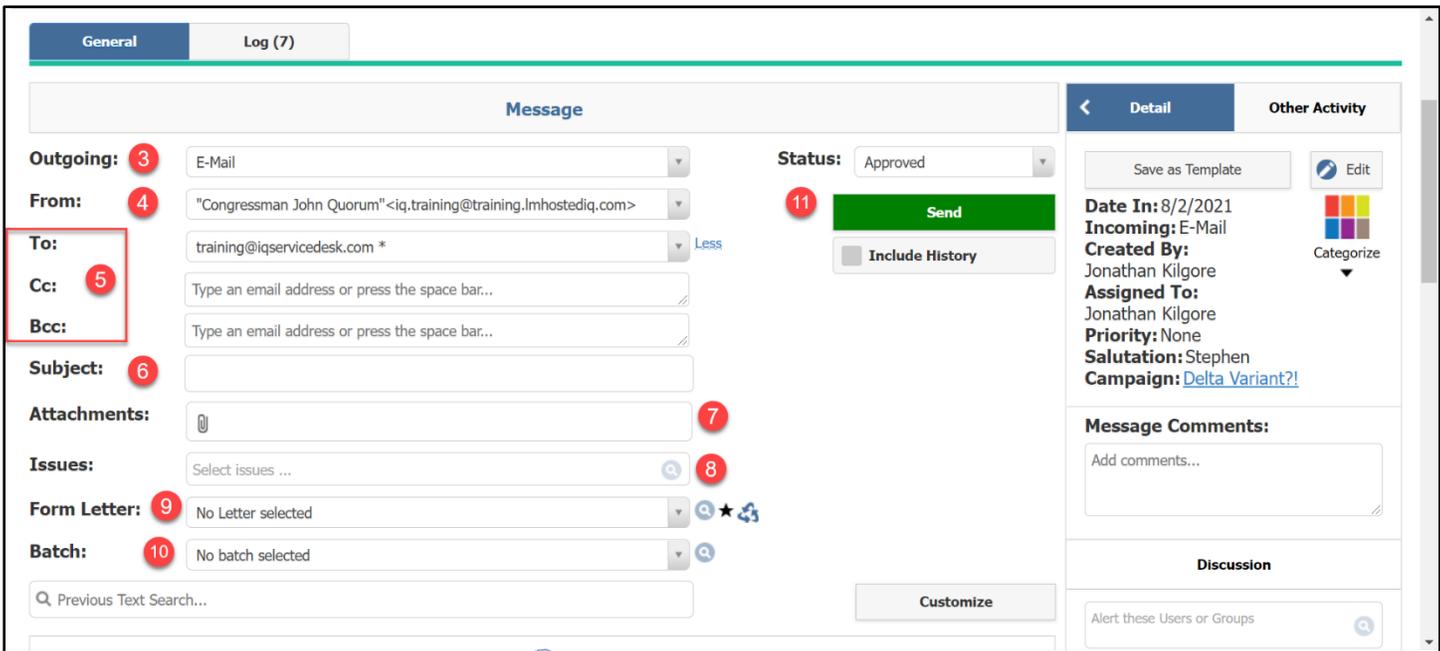
- 3. Click **Send Email** or **Print Letters** from the Batch you created for the Bill or click to send your Messages from the Message list result screen.
 - a. ***Note:** You can also enable the Auto Send rule from the Bill itself. See below for instructions.

Replying to a Message using a Form Letter

1. Locate the incoming Email message in a Messages List View.
2. Click **Reply**.

3. Select your outgoing response method.
4. Select your **From** email address.
5. Confirm the email in the **To:** field is correct and add any additional emails to the **CC** and **BCC** fields.
6. Type in a **Subject**.

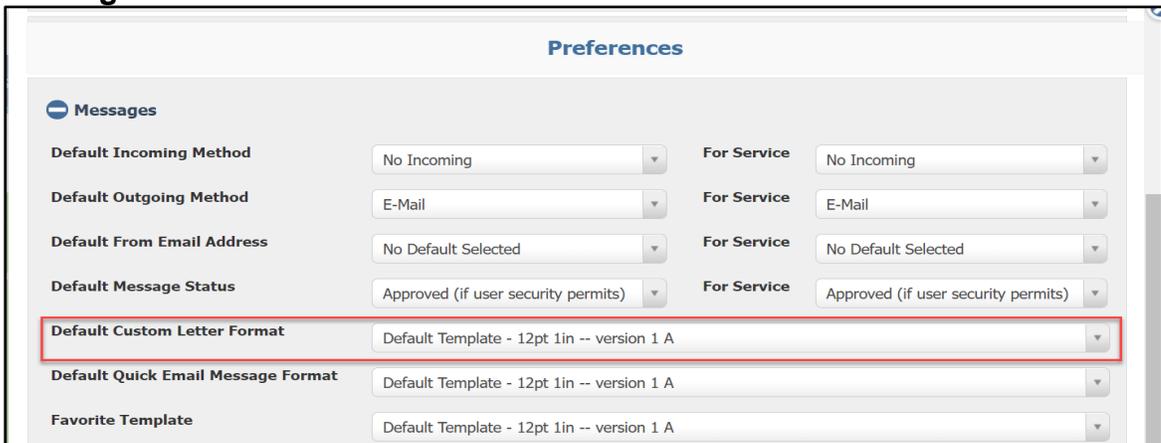
7. Click the paper click icon in the **Attachments** field to add outgoing attachments to the reply. You can also drag and drop files into the field.
8. Type any Issue Codes related to the message into the **Issues** field.
9. Select from the drop down in the **Form Letter** field the Form Letter you will be replying with. Note: you can also type ahead the Form Letter title or click the  icon to find the Form Letter.
10. Select a **Batch** in the **Batch** field if necessary.
11. When you are ready to send the email, be sure that the **Status** is **Approved**, and use the **Send** button.
 - a. Note that if you click **Include History** the Incoming Message you are replying to will be included as part of your reply.



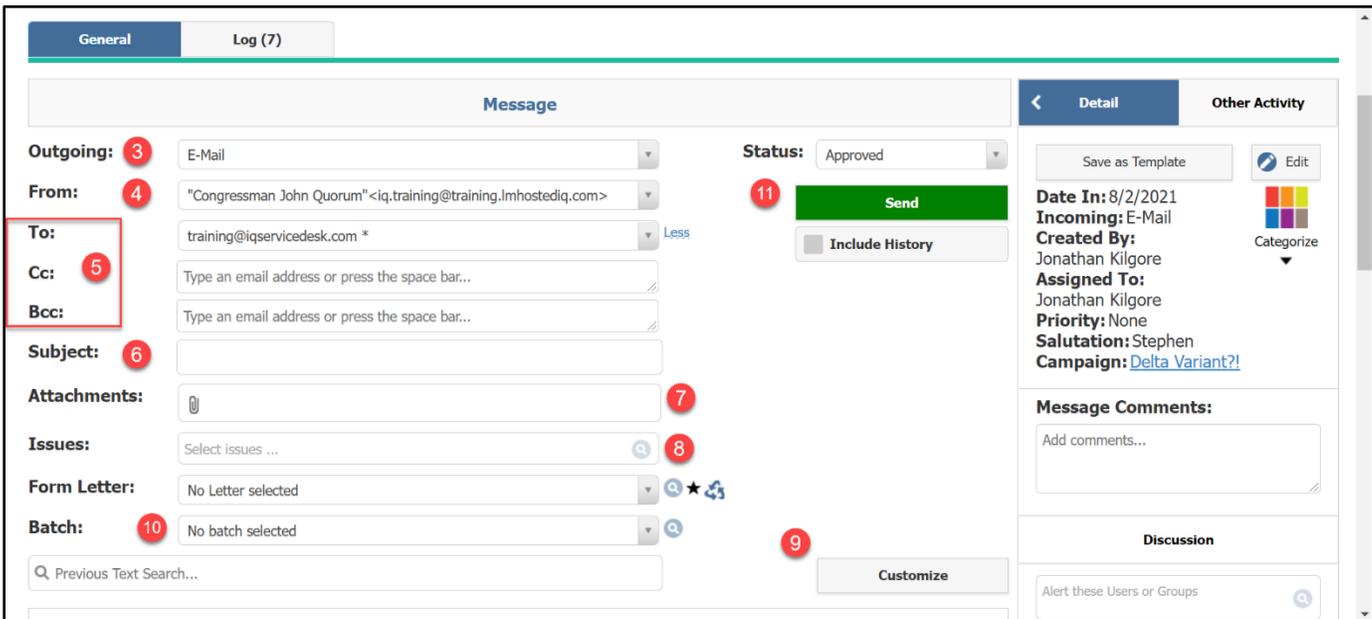
Replying to a Message using Custom Letter

1. Locate the incoming Email message in a Messages List View.
2. Click **Reply**.
3. Select your outgoing response method.
4. Select your **From** email address.
5. Confirm the email in the **To:** field is correct and add any additional emails to the **CC** and **BCC** fields.
6. Type in a **Subject**.
7. Click the paper click icon in the **Attachments** field to add outgoing attachments to the reply. You can also drag and drop files into the field.
8. Type any Issue Codes related to the message into the **Issues** field.

9. Click **Customize** to type out a custom response using your default Custom Letter Format.
 - a. Make sure to choose your default Custom Letter Format in your **Preferences** under **Messages**.



10. Select a **Batch** in the **Batch** field if necessary.
11. When you are ready to send the email, be sure that the **Status** is **Approved**, and use the **Send** button.
 - a. Note that if you click **Include History** the Incoming Message you are replying to will be included as part of your reply.



Processing Messages Without a Response

1. Locate the incoming Email message in a Messages List View.
2. Click **No Response**.

Reply Change Batch Add Edit Contact Color **No Response** Forward +Affiliation +Service Swap Contact Reports (ID# 5008165) 5

Recent Activity **Delete**

E-Mail

Date In: 8/2/2021
Modified: 8/4/2021 - 4:44pm
Issue: COVID19 - Covid19 issues
Subject: Delta Variant?!
Comments: ✎

[Stephen Boyd](#) (Low)
✉ training@iqservicedesk.com
Assistant Attorney General for Office of Legisla...
U.S. Department of Justice
Office of Legislative Affairs
950 Pennsylvania Ave NW, Room 1145
Washington, D.C. 20530-0009 DC01
Business: (202) 514-2141
Fax: (202) 514-4482
Agency Contact for Service Code(s): DOJ - U.S. Department of Justice

Status: Approved E-Mail
Assigned: Jonathan Kilgore
Response: None
Salutation: FORMAL - Stephen
Campaign: [Delta Variant?!](#)

3. The Message is Completed and no response is sent.

Enabling Auto Send for Batches, Campaigns and Bills

Batches, Campaigns, and Bills all allow for the Auto Send option to be enabled so that IQ will send the Messages for the user in the background on a specific day(s) and time of the users choice. **Note: To use Auto Send you must have the Security Permissions to do so. Talk with your IQ Consultant to learn more.**

1. Click **Enable Auto Send** next to **Modify Response**. This option will appear for Batches, Campaigns, and Bills as shown below.

The first screenshot shows a campaign card for 'AFGHANISTAN RESPONSE'. The 'Enable Auto-Send' button is highlighted in red. The card also shows 'Status: Active', 'Owner: Jonathan Kilgore', 'Created: 9/20/2021 - 11:34am', and 'Oldest: 4/16/2021'. There are 487 On Hold E-Mail, 10 On Hold US Mail, and 497 total messages, with 497 Open Messages.

The second screenshot shows a message card for 'Save the economy!'. The 'Enable Auto-Send' button is highlighted in red. The message content is 'Dear Congressperson, Please support local businesses and save our economy! Local businesses are being pushed out of our community by big corporations and this isn't helping our economy! Do the right ...'. There are 505 Open variations.

The third screenshot shows a bill card for 'HRES 1064 - Supporting the goals and ideals of Black, indigenous, and people of color ("BIPOC") Mental Health Awareness Month in July 2020'. The 'Setup Auto-Send' button is highlighted in red. The card also shows 'Messages: 900 (602 open)', 'Campaigns: 3', 'Form: 1', 'Letters: 1', and 'Policy: Health'. The bill is sponsored by Rep. Johnson, Eddie Bernice [D-TX-30] and co-sponsored by Rep. Fudge. The latest action is 'Referred to the House Committee on Oversight and Reform. (7/23/2020)' and the major action is 'Introduced in House (7/23/2020)'.

2. Select which day(s) of the week and time IQ will send the Messages.
3. Select a number of hours old the messages must be to be eligible for Auto Sending (the default is 2 hours).
4. Click the field next to **Stop automatically sending messages on:** to choose a calendar day that the Auto Send rule will stop. Leaving it blank will have IQ run the Auto Send rule indefinitely.

Set Up Batch Auto-Send

Automatically approve and email all unrestricted open messages in this campaign that have an approved version of the letter...

Afghanistan Response v.1 Approved

Send on these days: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Start Sending these messages at:

Messages must be at least hours old before they are eligible for auto-sending.

Stop automatically sending messages on:

5. With Auto Send enabled, IQ will send the Approved Form Letter based on the rules set on this screen. These rules can be modified at any time.

[Lock](#)
[Do not remove when emptied](#)
[Change Name](#)
[Change Owner](#)
[Change Pending](#)
[Change Status](#)
[Modify Response](#)
(ID# 290) 3

Modify Auto-Send
[Print Letters](#)
[Send Email](#)

AFGHANISTAN RESPONSE

Status: Active

Owner: Jonathan Kilgore

Created: 9/20/2021 - 11:34am

Oldest: 4/16/2021

487 On Hold E-Mail

10 On Hold US Mail

497 total messages

[497 Open Messages](#)

Print Letters

PREVIEW 7 of 10 letters may be printed.

ID	Name	Error
5007967	Bryana Spann	Mail record cannot be printed because the domestic zip code is empty.
5008160	Ovp Staff 5.	Mail record cannot be printed because the domestic zip code is empty.
5008320	Lori Zeoli	Mail record cannot be printed because the domestic zip code is empty.

Allow incomplete addresses to be printed

Sort Name ▼

Location Microsoft Word via Download ▼ as zip

Bin Control ▼

Do not prompt for printer again

Print Cancel