# Utilizing Sets in IQ

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

**Description:** The IQ Sets feature allows you to load Contact information into the database from a source file (i.e. .csv, comma or tab delimited .txt) and also processes certain types of incoming emails. Sets that contain incoming emails are not automatically "posted" into IQ. These incoming emails are captured in different types of Sets, which allow you to make the choice to include them as Message records in IQ, or to delete the emails before they become Message records. In this way, you can eliminate "junk" emails or correct incorrect email addresses without creating a record in your database

# Email Sets

Email Sets display incoming emails that have been processed through the Internet Mail Agent (IMA). Your office may have set up rules to place incoming emails into particular sets based on key words in the content of the email or based on location of the sender. Each office may have a few or many Email Sets depending on the processes used to sort and assign incoming email correspondence.

## Process Email Sets

You can change information in Set records at any time prior to posting the records. Records can be changed individually using Row Actions or updated as a group using the Change options.

- 1. To process Email sets, select All Message Sets in the Utilities column in the Messages menu.
- 2. Click the Set Name to view all records in the Set. These records have not yet been posted into IQ you will need to determine which records will become IQ Message records. Each correspondent in the Set record is either matched to an existing Contact record or IQ will

create a new Contact record if a match cannot be found and a Reveision will appear next to the record.



Search Again

If IQ has mismatched Contact records, you can use the option to Search Again.

Page **1** of **8** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos. 1. Using the Row Action for the Set Record that has a mismatched Contact, select **Search** Again.

		Shortcuts 🗸 Ned 🗸
Home Contacts 🗸	Messages 🗸 Outreach 🗸 Services 🗸 Library 🗸 Events 🗸	
Find Contact	Contacts » <u>Results</u> » <u>Set</u> » New	
Bobble Smith	Set Entry Search Again for 7001041][2638 (1 Records) 6	
bobbie.smith@dsitrainiq3fc.cor	Add Contact Change 🛇 New 🛇 More 🛇 Sort: Name (Asc) 🛇	۲
Phone Number	Select	(ID# 7001041) 1
Organization	Mrs. Bobbie Ann Smith     Messages: (Open: 2 Completed: 0)     Outreach: (Open: 2 Completed: 0)	
Organization2	123 Main Street Completed: 0) Washington, D.C. 20515-0001 DC00 Services: (Open: 0 Completed: 0) bobbie ambthedistrainio3f.com	
123 Main Street		
Street Address2		
20515		
Find Existing Contacts		

2. The information IQ used to locate the Contact record appears in the Find Contact section on the left. All possible results appear in the List View. If you have located another Contact record, use the Select in-row action to attach the correct Contact to the Set record.

# View Contact

- **1.** You can edit the Contact record by using the **View Contact** in-row action.
- **2.** The Contact record opens and you can edit any information in the record.

## Edit Name and Address

- 1. Use the Edit Name and Address in-row action to update Name, Address and Salutation information for the correspondent.
- **2.** IQ displays the contents of the incoming email below the Name and Address fields so you verify the information.

# Change Response and Status

1. Use the Change Response and Status in-row action to update Issue Codes, reassign the incoming record to another IQ user, add Comments, change the outgoing method. On the right side, you will see the content of the incoming email, as well as any suggested Form Letter responses based on Issue Codes.

Source	E-Mail	Issue Related: Taxes v. 2
Issues	× TAX - Taxes	The Fair Tax Act removes the burden of the income tax and other federal income
Assigned To		_ based taxes.
Comments		The current tax system is incomprehensible. It is beyond reform. It simply has to go.
		The Fair Tax Act replaces the current tax system with a national consumption tax
Method Out	E-Mail	that: • Allows Americans to keep 100 percent of their paychecks, pensions, and Social Security payments. • Provides a prepaid, monthly rebate for every
E-Mail To	bobbie.smith@dsitrainiq3fc.com *	education, and retirement. • Raises the same amount of money for the federal
Address	123 Main Street Washington, DC 20515-0001	government. • Makes American products more competitive overseas.
CC's		I urge you to heed the vast majority of voters who will surely support you if you
Subject	Re: Fair Tax	are seen as responsible for passage of this historical tax reform measure.
From		As a constituent, I would like to know where you stand on the FairTax.
Letter Date		
Salutation	Formal - Dear Mrs. Smith	
Form Letter	Select a letter	

- 2. In the Status field, select "Posted without a batch", "Post to an existing batch", or "Post to a new batch". If you select "Post to an existing batch", IQ will display a **Batch** field with a list of existing batches. If you select "Post to a new batch", IQ displays a **New Batch Name** field for you to create a new batch.
- **3.** Click the **Post** button to process the Set record.

Forward

**1.** You can forward an incoming email to another member/organization, if it is from a non-constituent, by selecting the **Forward** in-row action.

	Forward E-mail	
From	"Ned Stark" <imos@dsitrainiq3fc.com></imos@dsitrainiq3fc.com>	
То		0
сс		0
BCC		0
Subject	FW: Farm Bill	
Attach	1029112917398.txt	$\hat{\mathbf{C}}$
The attached em attachments of th	all message has been forwarded to you. Any additional files are is original inbound message.	~ ~
From: "jim.demint( Date: 10/29/2007 To: QNG2@dsitrai Subject: Farm Bill	@dsitrainiq3fc.com" <jim demint@dsitrainiq3fc.com=""> 10:50:44 AM niq3fc.acct04.us.lmco.com</jim>	
<app>CUSTOM <prefix>The Ho <first>Jim<last>Demint<addr1>340 Rus <city>Washingto</city></addr1></last></first></prefix></app>	norable ST> AST> sell Senate Office Building 	

**2.** IQ displays the **Forward E-mail** dialog. The To, CC and BCC fields contain a list of IQ users. You can, however, type an external email address (i.e. william.smith@mail.house.gov).

Page **3** of **8** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

- **3.** The **Subject** field defaults to the subject of the incoming email and the incoming email is attached as a .eml file.
- **4.** IQ populates the message text with "The attached email message has been forwarded to you. Any additional files are attachments of this original inbound message." You may edit or remove this message text.
- **5.** The contents of the incoming email is displayed below the message text, but is not included in the forwarded email unless you check it. If, however, you select it, then the attached .eml file will NOT be included.
- **6.** Click the **Send** button at the bottom to forward the email. IQ displays "Message sent." Click **OK** to close it.

## Delete

1. If you would like to delete the Set record without creating an IQ Message record, use the **Delete** in-row action. This will delete the Set record from the database.

## Import Set

Import Sets allow you to load Contact information into IQ from a source file. You can either load the Contact information only, or you can opt to set up an outgoing Form Letter Message to all imported Contacts.

## Exception Set

IQ automatically creates an Exception Set to capture incoming emails, which have not been processed by an IMA rule. Often these emails are considered "junk emails" and are not high priority. You should, however, check the Exception Set on occasion, and delete any emails you do not want to process into your IQ database.

To process records in the Exception Set:

- 1. In the Messages menu, select All Message Sets in the Utilities column.
- 2. Click the Exception link to view all Set records.



- 3. Use the Filters on the left to sort out specific Set records to edit.
- 4. Use the Row Actions to edit individual Set records
- **5.** To edit multiple Set records, select the records you would like to edit, and use the Change options at the top of the List View.

# Nondeliverable Set

The Nondeliverable Set is composed of emails that have been sent out by your office and have bounced back, either due to the fact that the email address was not correct, or that the recipient's inbox is full. In either case, you will want to address these emails, either by enabling the Nondeliverable Rules to process the records automatically or by manually reviewing the records in the Nondeliverable Set.

The Nondeliverable Set can be accessed from the **Utilities** section in the **Messages** menu. Outgoing email messages returned or "bounced back" as undeliverable will be added to this set. A "hard bounce-back" email is one that is sent to a non-existent email address. A "soft bounce-back" is an email that is returned, because the recipient's email box is full. These messages should be reviewed and compared against the IQ Contact records that match the email address used in the outbound message.

If the returned email contains only one intended recipient, then IQ will search for an existing Contact record. If only one match is found, IQ displays it in the **Found...** column. If no match or more than one match is found the **Found...** column is not updated. You can use the **Search Again** in-row action to search for and select the appropriate match.

IQ displays a link to the Related Message ID in the Nondeliverable Set and in the Nondeliverable Email List Results, so that you can trouble-shoot the mailing if that is required.

In addition, there is a filter and analyze field called "Delivered Outreach" which can be added to the Outreach Messages Contact grid to filter or analyze whether the Contact's email address resulted in a non-deliverable message.

- **1.** Use the **Edit Contact** option to open the Contact record for editing.
- 2. Use the Forward option to forward the Message to another email address.
- **3.** Use the option to **Edit Response** to update the information for the response you intend to send.

Edit Response to IQ4@DSIIQFOUR.DSI.ESS.LMCO.COM					
Source	Email	Recent Letters:	Select a recent form letter		
Issues	0	Subject: Message S	itatus - Undeliverable		
Assigned To	Clark Kent 🗙 🔻	The attached file ha	nad the following undeliverable recipient(s):		
Comments		Information about y of send attempts: 1	your message: Message log tag: 72177747 Number . Time of initial send attempt: 05-16-14 09:10:20		
Method Out	No Outgoing	Transcript of session follows: Command: Data Response: 554 5.4.0 Error: too many hops			
Address	Congressman George Miller U.s. House of Representati				
	Save Post Cancel Delete				

**4.** Use the **Deactivate or Post** option to update the email address in the Contact record, delete it, or post the message to IQ.

Source	Email v	Recent Letters:	Select a recent form letter	
Issues				
		Subject: Undeliveral	Die: Safari with hyperlink to baltimoreravens.com	
Assigned To	Clark Kent 🗶 🔻	Delivery has failed t	to these recipients or groups:	
Comments		pqalmdsi@gmail.com <mailto:pqalmdsi@gmail.com> Your message wasn't delivered due to a permission or security issue. It may have been rejected by a moderator, the address may only accept e-mail</mailto:pqalmdsi@gmail.com>		
Method Out	No Outgoing +	delivery.	s, or another restriction may be preventing	
Address	Lmdsi 2700 Prosperity Avenue Fairfax, VA 220 👻	The following organization rejected your message:		
Status	Save without posting	mailfo02.lmco.com.		
	م			
	Save without posting			
	Post without a batch			
	Post to an existing batch			
	Post to a new batch	Diagnostic information for administrators:		
	Deactivate and leave in the set	,		
	Deactivate and delete	Generating server: (	exch.ems.lmco.com	
	Post a closed message and delete Post a closed message, deactivate, and delete	pqalmdsi@gmail.co message refused by violation . ##	m mailfo02.lmco.com #556 5.7.1 Your outbound v Lockheed Martin due to content or security policy	
		Original message he	eaders:	
		Received: from ems HVXHTPN11.us.lmc Server (TLS) id 14.3 Received: from DSI by emss04g01.ems. tSUEE7Jh006044 for LSUEE7Jh006044 for	s04g01.ems.lmco.com (166.17.13.122) by o.com (158.186.149.29) with Microsoft SMTP 3.174.1; Tue, 30 Jun 2015 10:14:12 -0400 IQFOUR12.acct04.us.lmco.com ([158.183.90.191]) Imco.com (8.14.5/8.14.5) with ESMTP Id r <pgalmdsi@gmail.com>; Tue, 30 Jun 2015</pgalmdsi@gmail.com>	

Page **6** of **8** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

#### Save without posting

If you've made changes to the record, use this option to save without posting the changes to the database.

## Post without a batch

Select this option to post the message to the database without a batch.

#### Post to an existing batch

Select this option to post the message to the database and place in an existing batch.

## Post to a new batch

Select this option to post the message and add a new batch.

#### Deactivate and leave in the set

If the email address is no longer valid, use this option to deactivate the email address and leave the message in the set.

#### Deactivate and delete

If the email address is no longer valid, use this option to deactivate the email address and delete the message from the set.

#### Post a closed message and delete

Use this option to post the bounce-back email and remove it from the set.

#### Post a closed messages, deactivate, and delete

Use this option to post the bounce-back message to the contact record, deactivate the contacts email address and remove it from the set.

#### Inbox Full (Soft Bounce-Back)

If you have an email address that has bounced back because the recipient's in-box is full, you will want to **Post** the message to the Contact record.

#### Bad Email Address (Hard Bounce-Back)

If the email address is incorrect, it should be deleted from IQ.

- 1. Delete removes the invalid email address from the Contact record that appears in the Found column.
- **2. Deactivate** changes the Online Info entry to "Inactive Email" in the Contact record(s) for the email address listed in the **Found** column.
  - a. When an email address in a Contact record is made Inactive by a Nondeliverable Rule, the Status Log entry includes the email address and the Nondeliverable Rule number. If the Contact record contains another non-primary email address, IQ will mark it as primary when it deactivates the email address listed in the **Found** column.

Page **7** of **8** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.

NONDELIVERABLE 🖌		Owner: QC Created: 8/6/2012 Status: Open Rules: Enabled Unprocessed Count: 0		
General				
Filters	🚔 Set (749 Records) 🚱			
Q Filter Text	List Analyze Change 🛇	More 🛇 Sort: Comments (Asc	)	۲
Incoming E-mail Subject	Search Again Forward Delete			(ID#][31246) 1
Incoming Issues Codes	Searched	Found None selected	Created: 11/19/2013 Rule/Comments: Nondeliverable E-Mail back from Postmaster.	
Incoming Rule			Subject: Delivery Status Notification (Delay) Method Out: imail	
E-Mail Custom Tag	Search Again Forward Delete			(ID#][31247) 2
C Email Domain	Searched test@testing.com	Found None selected	Created: 11/19/2013 Rule/Comments: Nondeliverable E-Mail back from Postmaster	
E-mail Format			Subject: Delivery Status Notification (Delay) Method Out: imail	
Assigned To	Search Again Edit Contact Change Response an	d Status Forward Delete	(ID# 702	29082][31248) 3
<ul> <li>Letter</li> <li>Outgoing Method</li> </ul>	Searched testing@testing.com	Found Mr. First Last Addr1	Created: 11/19/2013 Rule/Comments: Nondeliverable E-Mail back from	
C Existing or New		City, D.C. 55555 testing@testing.com Very Important Person	Subject: Delivery Status Notification (Delay) Method Out: imail	
Entered Year	ered Year Search Again Edit Contact Change Response and Status Forward Delete			
Entered Month	Searched testing@testing.com	Found Mr. First Last	Created: 11/19/2013 Bule / Comments: Nondeliverable E-Mail back from	
Affiliations		Addr1 City, D.C. 55555 tocting@tocting.com	Postmaster. Subject: Delivery Status Notification (Delay)	
🛟 City		Very Important Person	Method Out: imail	
🛟 County	Search Again Edit Contact Change Response an	d Status Forward Delete	(ID# 702	19082][31250) 5
State	Searched testing@testing.com	Found Mr. First Last Addr1	Created: 11/19/2013 Rule/Comments: Nondeliverable E-Mail back from Postmaster,	
U congrossatet		tosting@tosting.com	Subject: Delivery Status Notification (Delay)	

# Physical Mail Set

Letters which have been saved as .tif or.pdf files can be uploaded into IQ in a Physical Mail Set. IQ will then OCR the contents of the uploaded image files. You can then search for an existing Contact and add a new Contact if a match isn't found. After a Contact record has been selected or created, then a Message record can be created by posting the Set record.

Page **8** of **8** Leidos proprietary 2025 This information may not be used, reproduced, disclosed, or exported without the written approval of Leidos.