

## 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.

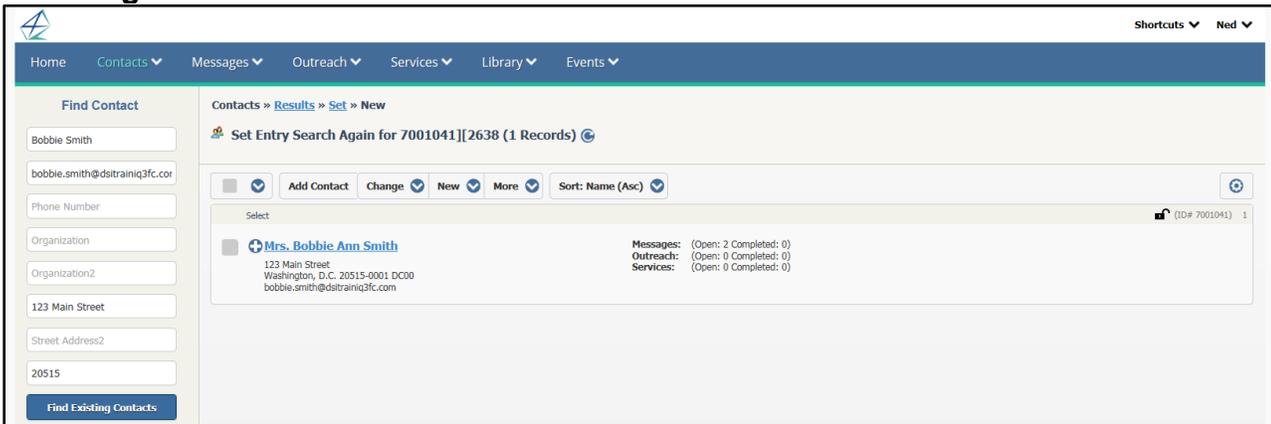
1. To process Email sets, select **All Message Sets** in the Utilities column in the **Messages** menu.
2. Click the Set Name to view all records in the Set. These records have not yet been posted into IQ - you will need to determine which records will become IQ Message records. Each correspondent in 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 **New** icon will appear next to the record.

Searched...	Found...	Created:
Mrs. Bobbie Smith 123 Main Street Washington, DC 20515-0001 bobbie.smith@dsitrainiq3fc.com	Mrs. Bobbie Ann Smith 123 Main Street Washington, D.C. 20515-0001 bobbie.smith@dsitrainiq3fc.com	10/29/2007 Rule: 0 Subject: Fair Tax Issues: TAX -- Taxes Method Out: imail

### Search Again

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

1. Using the Row Action for the Set Record that has a mismatched Contact, select **Search Again**.



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.

- 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.
- Click the **Post** button to process the Set record.

*Forward*

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

- 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).

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*

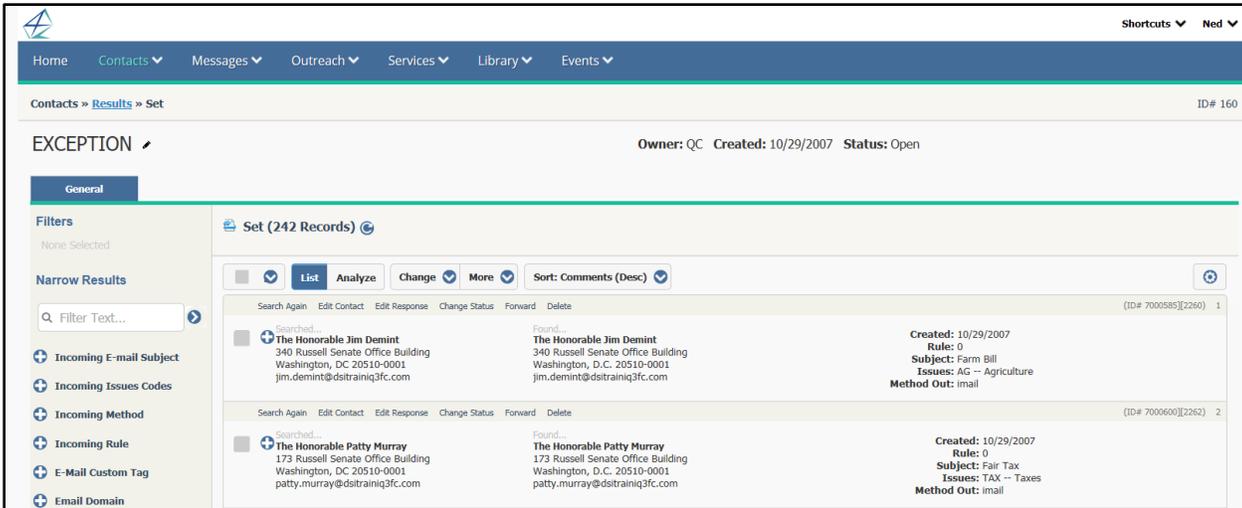
Import Sets allow you to load Contact information into IQ from a source file. You can either load the Contact information only, or you can opt to set up an outgoing Form Letter Message to all imported Contacts.

#### *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.

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

*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.

NONDELIVERABLE Owner: QC Created: 8/6/2012 Status: Open Rules: Enabled Unprocessed Count: 0

**General**

Filters Set (749 Records)

Filter Text...

List  Analyze  Change  More  Sort: Comments (Asc)

Search Again	Forward	Delete	Found...	Created:	Rule/Comments:	Subject:	Method Out:
			None selected	11/19/2013	Nondeliverable E-Mail back from Postmaster.	Delivery Status Notification (Delay)	imail
			None selected	11/19/2013	Nondeliverable E-Mail back from Postmaster.	Delivery Status Notification (Delay)	imail
			Found... <b>Mr. First Last</b> Addr1 City, D.C. 55555 testing@testing.com Very Important Person	11/19/2013	Nondeliverable E-Mail back from Postmaster.	Delivery Status Notification (Delay)	imail
			Found... <b>Mr. First Last</b> Addr1 City, D.C. 55555 testing@testing.com Very Important Person	11/19/2013	Nondeliverable E-Mail back from Postmaster.	Delivery Status Notification (Delay)	imail
			Found... <b>Mr. First Last</b> Addr1 City, D.C. 55555 testing@testing.com Very Important Person	11/19/2013	Nondeliverable E-Mail back from Postmaster.	Delivery Status Notification (Delay)	imail

### 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.