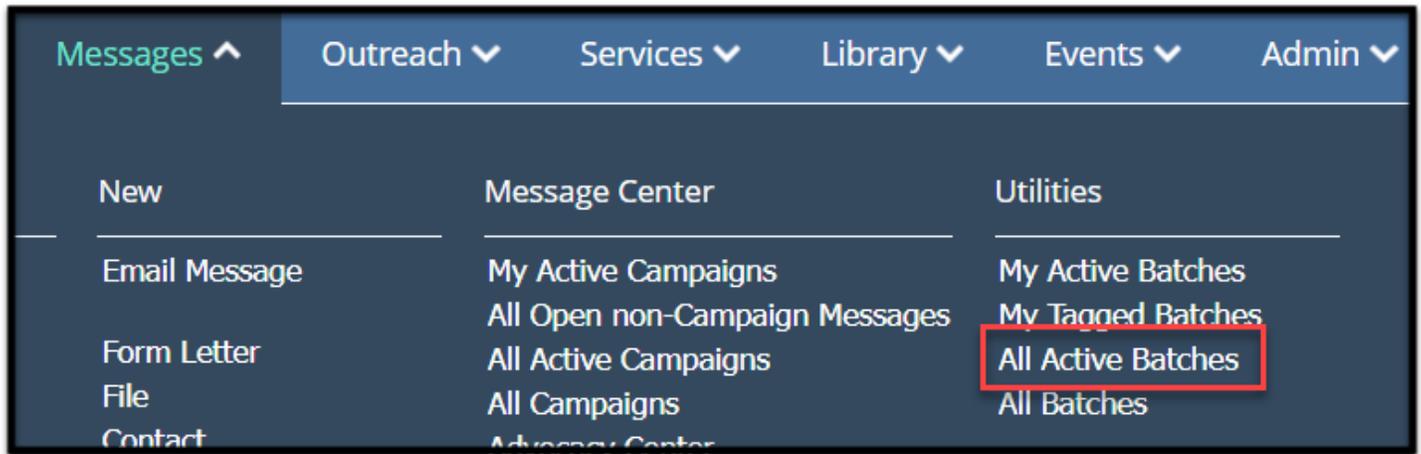


Add Agency Contact Mail

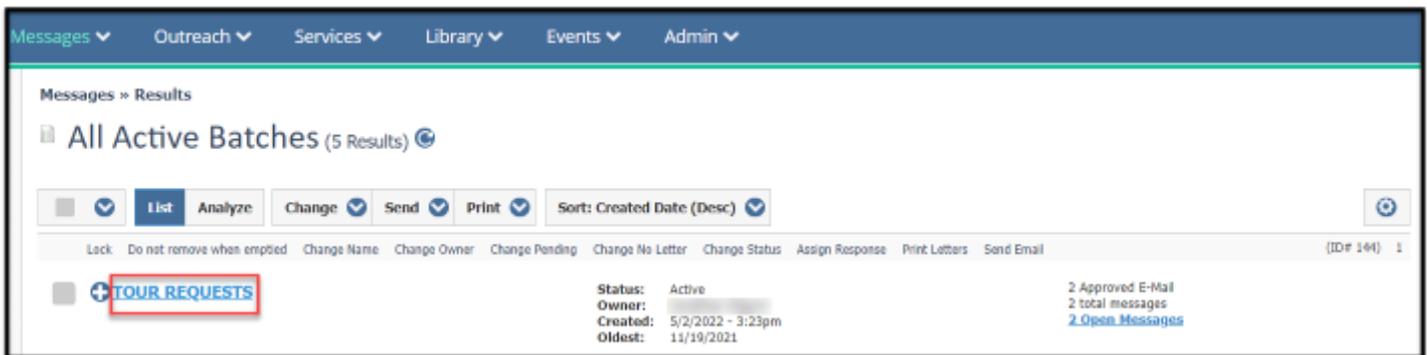
Market: Federal/State/Local, House, Senate

Description: This guide provides instruction on how to create multiple Services from individual messages in a batch and, at the same time, create and send Messages to the Agency and Primary Contacts for those Services.

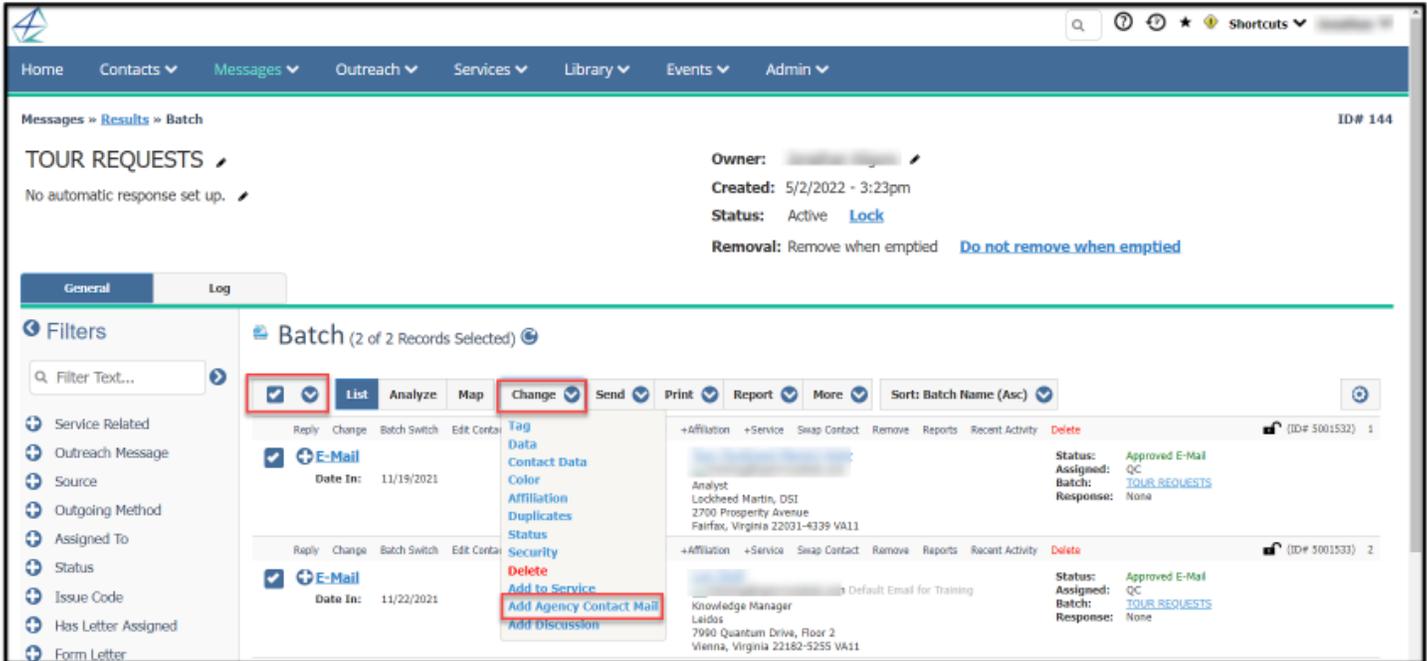
1. Click on **Messages > All Active Batches**



2. Click on the Batch with Messages that have the Messages you wish to create one Service type for. The example below uses Tour Requests.



3. Select all the Messages in the Batch.
4. Click on **Change > Add Agency Contact Mail**



5. In the new Dialog select the following:

- a. **Service Type:** In this example, we chose Tour Requests. This is the Service that will be created for all the individual messages in the batch.
- b. **Service Code:** Select the Service code associated with the Service Type you selected above. In this example, our code is Tour Requests. For a Service Type like Casework, your Service codes would represent different departments/agencies.
- c. **Select the Agency Contact:** Click into this box to choose which Agency Contact will be associated with these services and will receive the letter you select in the next field. Do note that multiple agency contacts can be selected in this field.
- d. **Select the Letter to send to the Agency Contact:** Click into this drop-down to search for an existing form letter to send to the Agency contact.
***Note:** You can choose to set the status of the message going to the Agency Contact with the selected letter to **On Hold** so it won't send immediately.
- e. **Select the Letter to send to Constituent:** Click into this drop-down to search for an existing form letter to send to the Constituent (primary contact of the Service you are creating).

Create Agency Contact Services and Messages

Select the service type to create for these existing messages...

A

Select the service codes to add to these new services...

B

Select the Agency Contact to send messages to about these new services...

C

Select the letter to send to the Agency Contact... On Hold Include the original incoming attachment

D

Select the letter to send to the constituent... Close with no response

E

Send messages immediately, only go to the list if some cannot be sent

Create 2 Agency Contact Services and Messages in batch TOUR REQUESTS

After the services are created and the agency messages are added you will be taken to a list of the original messages and the new agency contact messages where you can then send or print them.

6. Choose whether or not to check the box next to **Send messages immediately, only go to the list if some cannot be sent**. Checking the box will send your messages to the Agency Contact(s) and Constituents immediately, not checking it will bring you to the list of just created messages to be sent.
7. Click **Create Services and Add Agency Contact Messages**.