

Sending a Message via a Service Record

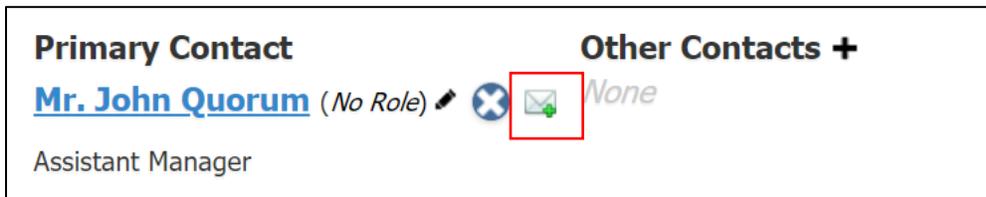
Market: Federal/State/Local, House, Senate

Description: Within the Services module, users can email and respond to the constituents via Form Letter or a customized response. These instructions teach users how to create and send these messages.

A best practice when responding to a constituent associated with a service record is to first attach a contact record to the service record first prior to sending an email.

Sending a Message

1. Open an active service record.
2. Select the envelope icon next to the Primary or Other Contacts.



3. Select the option to respond to the constituent

Option- Customize Response

Message

Outgoing:	E-Mail	Status:	Approved
From:	"Office of Congressman John Quorum" DistrictServices@training.lmho...	Send	
To:	isabella.strom@leidos.com *	Cc/Bcc	
Subject:	<input type="text"/>		
Attachments:	<input type="text"/>		
Issues:	Select issues ... + <input type="text"/>		
Form Letter:	No Letter selected * <input type="text"/>		
Batch:	No batch selected <input type="text"/>		
<input type="text" value="Previous Text Search..."/>		Customize	

- a. Click **Customize**.
- b. Modify the content of the response as needed.
- c. Click **Save**.

Option- Form Letter

At the Form Letter field, use one of the options below to select a form letter.

- a. *Drop down list*: select a Form Letter from the dropdown list.
- b. *Magnifying Glass*: select a Form Letter using advanced search.
- c. *Star*: if you have a template that is set as the default template used for a particular service, click this icon.
- d. *Recycling*: select a Form Letter that was previously used.

4. Select **Approve > Send**.

If you need approval for the Form Letter, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.

5. Select **Save** (this option is available only if the service record requires approval).