

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.

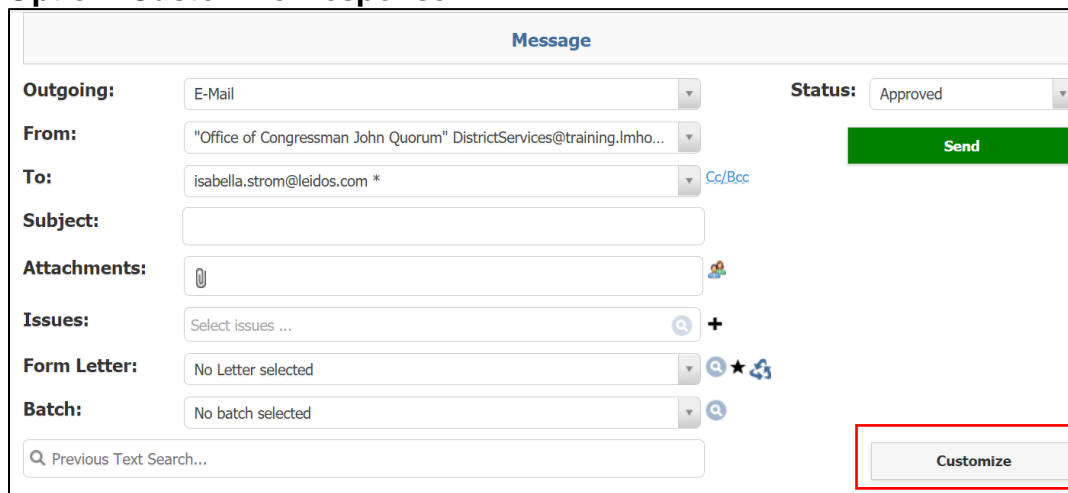
Sending a Message

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



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

Option- Form Letter

Form Letter: No Letter selected

Batch:

Previous Text Search

Sample General Response Issue Fill In -- version 1 -d-

San Diego City First Edition -- version 1

San Diego City Newsletter -- version 1 -d-

Save the Rainforest -- version 1

SD City Daily eNewsletter -- version 1

Staff Signature Template - 12pt 1in -- version 1

Stimulus Casework Letter -- version 1 -ra-

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

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

Status: Request Approval

By: Profile Caseworker

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