

## How to use the IQ Outlook Add In feature

**Market:** FSL, House, Senate

**Description:** This guide will walk you through the process of utilizing the IQ Outlook Add In to import Outlook emails into IQ as emails, Services, and events.

Click any of the following links to be brought straight to the subtopic:

[Add email to IQ Contact](#)

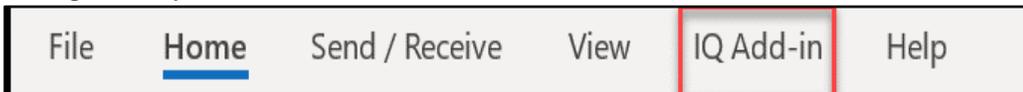
[Add email to IQ Service](#)

[Add email to IQ Event](#)

1. Within your Microsoft Outlook account, search and select the email that you want to import into IQ as an IQ message record.



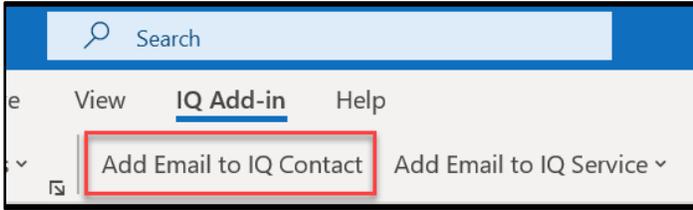
2. Navigate to your Outlook menu and select **IQ Add-in**.



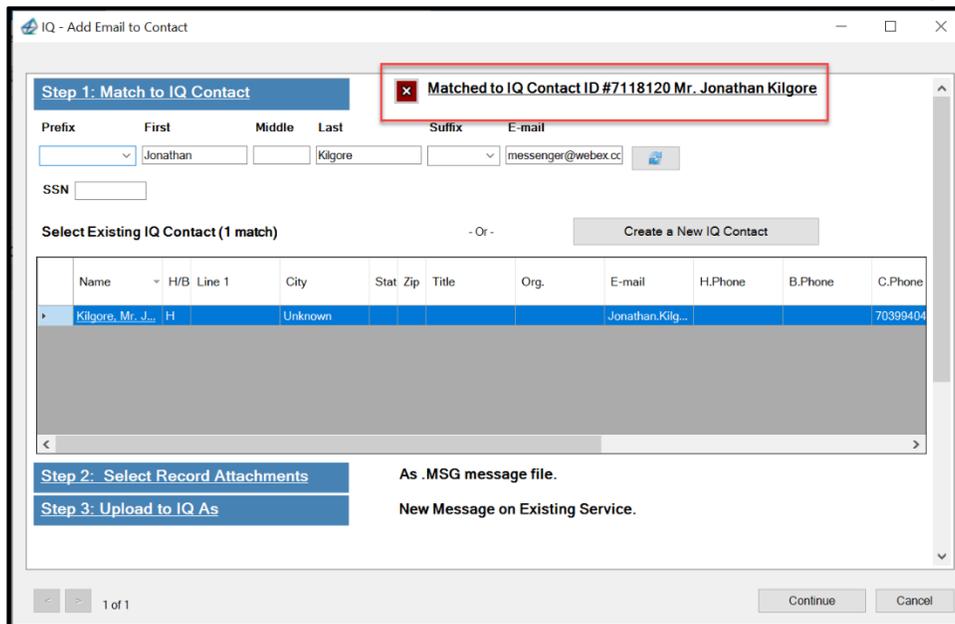
3. Select an option.

**Option 1: Add email to IQ Contact**

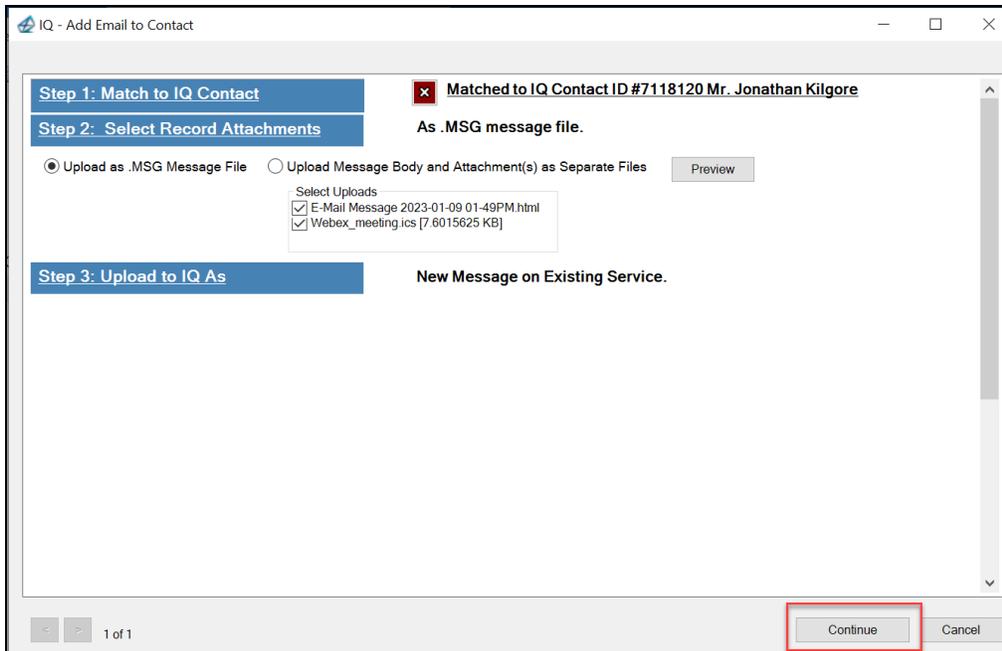
This option will import your Outlook email message into IQ as an Open Message record associated with the Contact record you match it with.



- 1) Outlook Add In will search your IQ contact records using the email sender's name.
- 2) Based on the results, click the contact who matches with the sender of the email. You will see the phrase, "matched to IQ contact ID \_\_\_\_" once you have selected your contact.
- 3) If the contact does not exist, click **Create a New IQ Contact** to add them to your database.



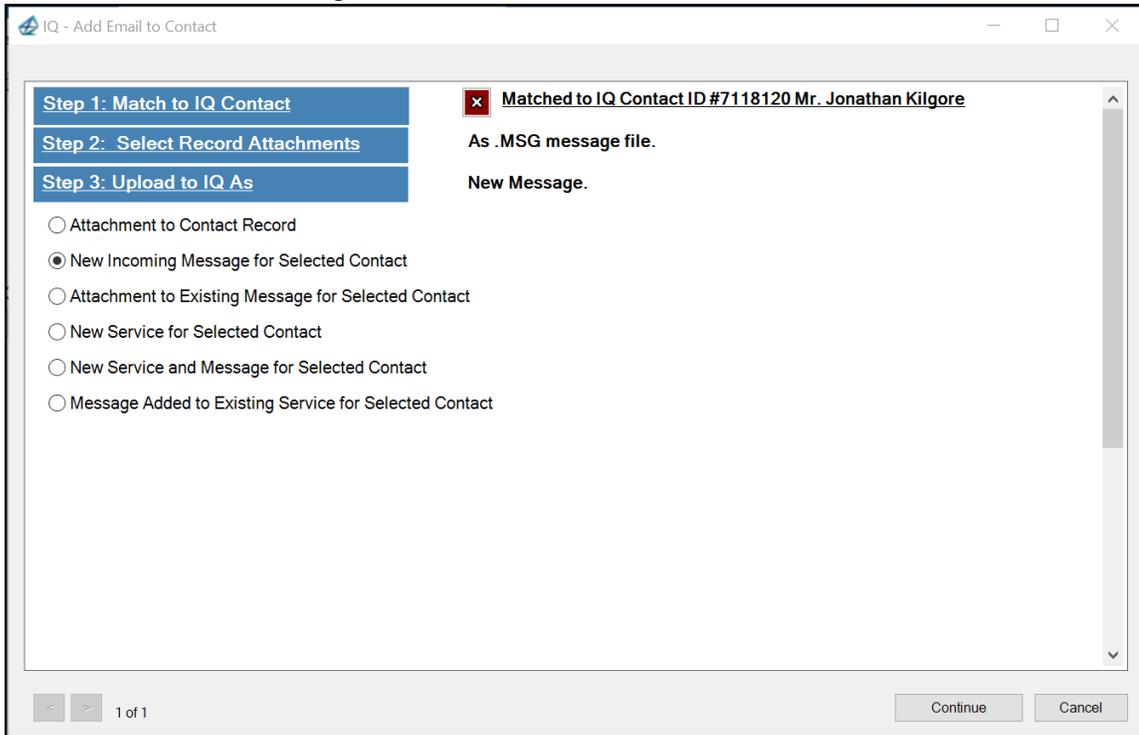
- 4) Once a Contact has been matched or created for the outlook email, you will be brought to step 2: **Select Record Attachments**



- 5) By default, **Upload as .MSG Message File** will be selected. If you wish to upload the body of the message and the attachments separately, choose that option. Select **Preview** to see how the email will look in IQ.
- 6) Click **Continue**.
- 7) Select the option that best describes what you want to do with the email. You can **Upload to IQ As**:
  - a. **Attachment to a Contact Record**: This will add the email as an attachment file within the contact record itself for you to download and review when you would like.
  - b. **New Incoming Message for Selected Contact**: This will add the email as an Open incoming email in IQ that you can then respond to with an IQ Form Letter or Custom Message.
  - c. **Attachment to Existing Message for Selected Contact**: If you have an existing Open Message from this contact, and you'd like to attach this outlook email to that Open Message, choose this option.
  - d. **New Service for Selected Contact**: If this email was a request for Casework, a Flag Request, a Tour Request, or any other Service, choose this option to create that New Service record and have this email attach itself as a downloadable file.
  - e. **New Service and Message for Selected Contact**: If this email was a request for Casework, a Flag Request, a Tour Request, or any other Service, choose this option to create that New Service record and have this email become an IQ Message record associated with it. The advantage of this option is that you can then have this logged as

an IQ message record which allows for easier review of it in the future, as opposed to a downloadable file.

- f. **Message Added to Existing Service for Selected Contact:** If this email was related to an existing Service for the sender, choose this option. This will allow you to then add the email to that existing service.



- 8) Click **Continue**.
- 9) Depending on what option you selected, follow the next steps as prompted on the screen and click **Save**.

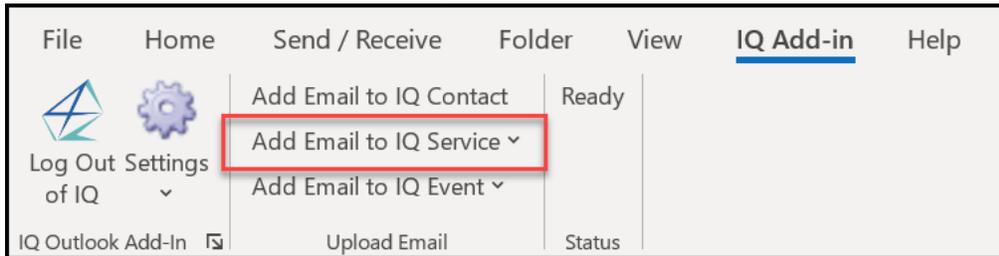
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### Option 2: Add email to IQ Service

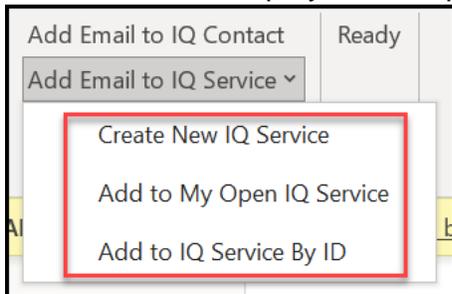
This option will import your Outlook email message into IQ and will save it as either:

- [An IQ open message that is associated with a new service record](#)
- [An existing service record in IQ](#)
- [A Service ID number](#)

1. Under the **IQ Add-in** menu, select **Add Email to IQ Service**.



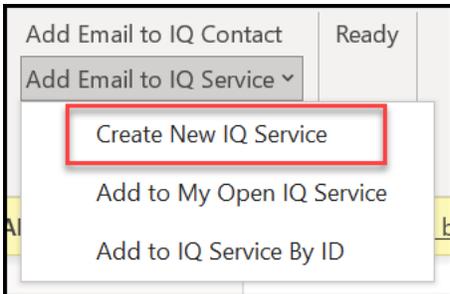
2. This action displays the 3 options.



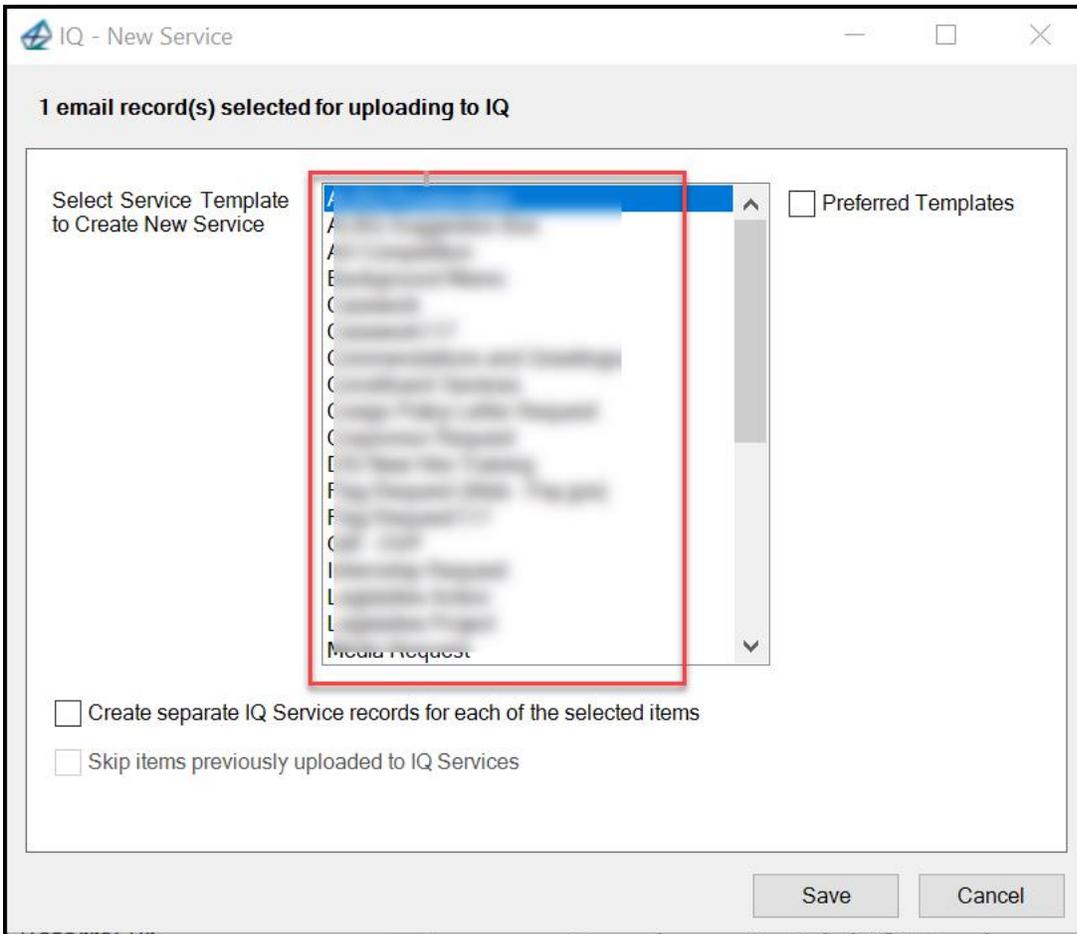
### Creating a new service

This option allows you to choose your service type and immediately create a new service with this message attached to it, along with the contact who sent it.

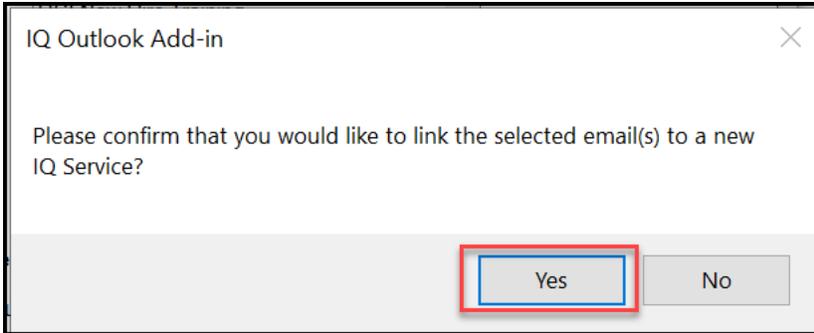
3. Select **Create New IQ Service**.



4. This opens the **IQ – New Service Window**. Select the correct template and click **Save**.



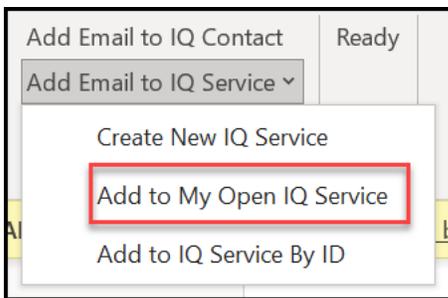
5. Select **Yes** to confirm.



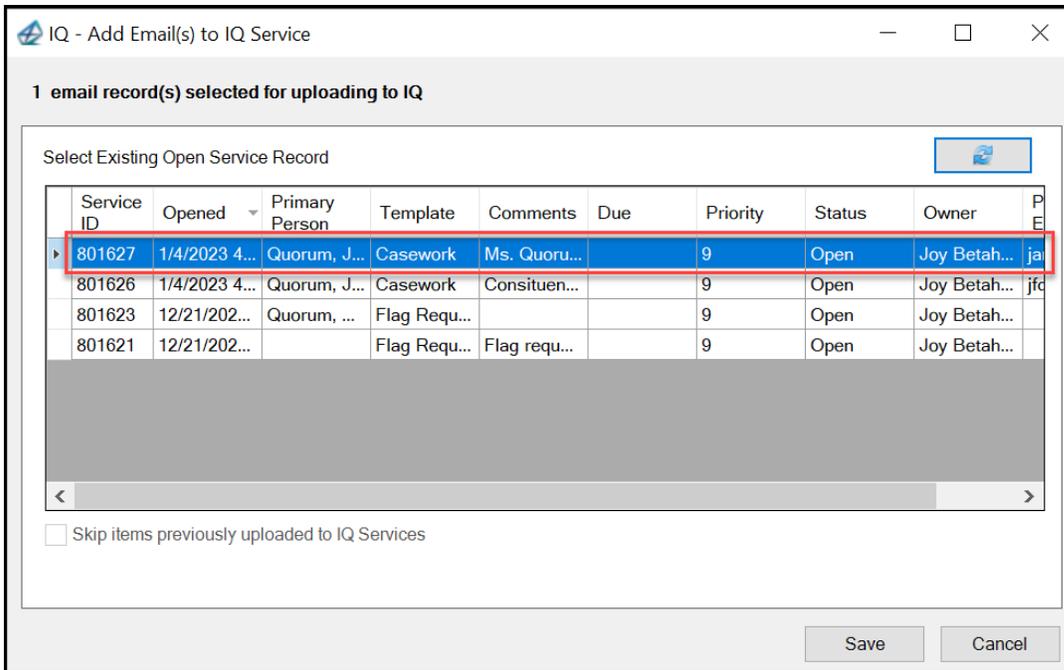
### Add to an Open IQ Service

This option gives you a list of your active services in IQ in which you can select to associate the Outlook message.

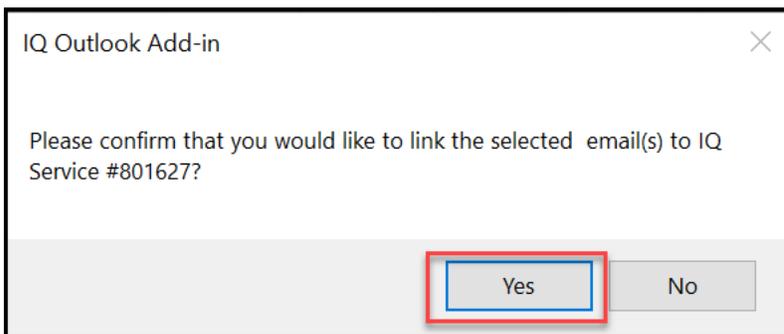
6. Select **Add to My Open IQ Service**.



7. This opens the **IQ – Add Email(s) to IQ Service** window. Select the correct service record and click **Save**.



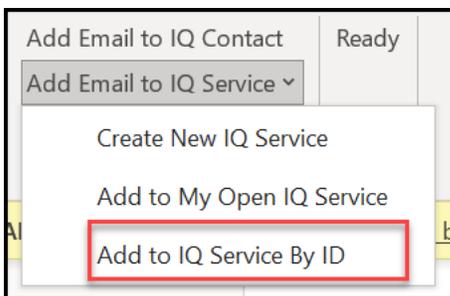
8. Select **Yes** to confirm.



### Add to IQ Service by ID

This option allows you to type in a specific Service ID # and send the message to that Service.

9. Select **Add to IQ Service by ID**.



10. This opens the **IQ – Add Email(s) to IQ Service** window. Enter the Service ID# and click **Save**.

IQ - Add Email(s) to IQ Service

1 email record(s) selected for uploading to IQ

Enter Service ID #

Skip items previously uploaded to IQ Services

Save Cancel

11. Select **Yes** to confirm.

IQ Outlook Add-in

Please confirm that you would like to link selected email item(s) to IQ Service #801627?

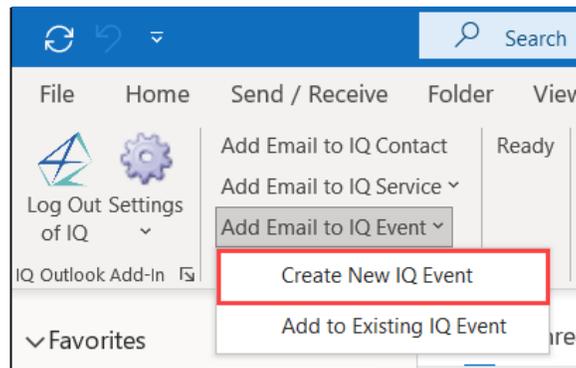
Yes No

### Option 3: Add email to IQ Event

This option allows you to quickly **create a new event in IQ** and associate it with the Outlook message or **associate the message to an existing IQ event**. These options require you to choose which calendar to add the event to and fill in other details for the event.

#### Creating a New Event from an Email or Outlook Calendar Event

- 1) From within the appropriate Outlook email or calendar event, select **IQ Add-in --> Add Email to IQ Event**.
- 2) Select **Create New IQ Event**.



- 3) Under IQ Calendar, select the appropriate calendar.
- 4) Complete additional fields.
- 5) Click **Save**.

IQ - Add Email(s) to New IQ Event

1 email record(s) selected for uploading to IQ

**Add IQ Event**

IQ Calendar: caseworker kilgore

Status: Approved

Private Event

Major Event

Date: 1/13/2023

Start Time:  3:30 PM End Time:  4:30 PM Time Zone: [dropdown]

Summary: Member to meet with Teachers association to discuss teachers concerns.

Notes: [text area]

Description: [text area]

Topics: Budget Issues, Defense, Education, Environment Issues, FAA

Office: In Washington, DC or elsewhere

Address 1: [text box]

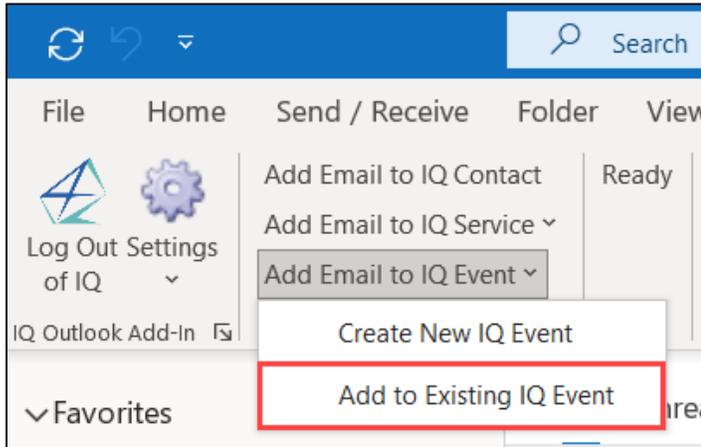
Address 2: [text box]

City: [text box] State: [dropdown] ZIP: [text box]

Save Cancel

**Add Outlook Email or Calendar Event to an Existing Service**

1. From within the appropriate email or calendar event, select **IQ Add-in --> Add Email to IQ Event**.
2. Select **Add to Existing IQ Event**.



3. [Implied from previous step]
4. Select appropriate event.
5. Click **Save**.

IQ - Add Email(s) to IQ Event

1 email record(s) selected for uploading to IQ

Select from existing IQ events for [redacted]

Wednesday, January 18, 2023 thru Wednesday, January 25, 2023

Event Date	Starts At	Ends At	Time Zone	Summary	Notes	Description
1/25/2023	10:00 AM	11:00 AM	ET	VA Health and B...	<p>VA Health an...	VA Health and B.
1/24/2023	1:00 PM	3:00 PM	ET	Education Lunch...	<p>weekly lunch ...	
1/23/2023	10:00 AM	11:00 AM	ET	VA Health and B...	<p>VA Health an...	VA Health and B.
1/19/2023	1:00 PM	3:00 PM	ET	Education Lunch...	<p>weekly lunch ...	
1/18/2023	10:00 AM	11:00 AM	ET	VA Health and B...	<p>VA Health an...	VA Health and B.

Skip emails previously uploaded to IQ Events

Save Cancel