Utilizing Outlook 365 in IQ5

Market: House, FSL

Description: IQ5 provides the ability to connect Outlook 365 email accounts to IQ5, allowing for access to your Outlook inbox within the My Inbox IQ5 application, syncing of events between outlook and IQ5 and more. The guide below provides instruction for setting up and utilizing these features.

Setup

- **1.** Connect your Office 365 account with IQ by going to User Settings \rightarrow Outlook.
- **2.** Type your O365 email and click **Get Access Token**.
- **3.** Sign in on the following page. Once Signed in a new page will appear showing that you were successful.

Viewing Outlook Emails in the My Inbox Application

- 1. Navigate to the My Inbox application.
- 2. Add the new View for Outlook Messages by:
 - a. Clicking on the List Views icon next to the Filter List (if views are not already open).
 - b. Click on the **L**icon next to **Views.**
 - c. Check the box next to Outlook Messages.
 - d. Click Save.





- **3.** You can now see all of your outlook emails (as well as your sent and other folders), reply from in IQ, or add them to IQ as a new Message and/or Service (such as a Casework).
 - a. *Note that you can switch folders by clicking Change \rightarrow Switch Folders

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) ⊘+	#2	☑ ② Ø Ø Ø Microsoft Outlook From: MicrosoftExchange329e71ec88ae46	Undeliverable: Test (IQ IMA00101703)	12/17/2024 04:32 PM	Message Attachments Recipients IQ Uploads	
		5bbc36ab6ce41109e@slcny.gctest.iqdsi.cc m			I'm replying to this second email. -Joy	
E) X Bo	#3	Google Calendar From: calendar-notification@google.com Reply To:	Declined: JK Test @ Fri Dec 13, 2024 1pm - 3pm (EST))	12/09/2024 06:20 PM	On Thu, Apr 3, 2025 at 11:45 AM Jonathan Kilgore wrote:	
E	#4	Anathan Algon From profiles Algon Wellgrod con	Re: Testing	12/02/2024 04:42 PM Uploaded to IQ as a new Message on 2025-04-02.		
	#5	Microsoft Outlook From: MicrosoftExchange329e71ec88ae46 5bbc36ab6ce41109e@Leidosdsi.onmicros ft.com	Undeliverable: Constituent Services for 1 Congressman John Quorum (IQ 1 MA00101635)	9/09/2024 03:58 PM	Congress of House of Mashing	Repres
	#6	Egen, Anather 5 (34-05) Free Scotlan Figure (\$1000.com	Test Casework Request	6/12/2024 12:57 PM Uploaded to IQ as a new Message on 2025-02-19.		3 🔊

4. Click the Email in the List to see it in more detail. Click the X button in the top right when done.

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D: C D	Filter List > Added to IQ > Selected	Test Casework Request From: Kilgore, Jonathan D. [US-US] [Jonathan.Kilgore-2@leidos.com] Receive: 6/12/2024 12:57 PM To: Jonathan Kilgore Message Attachments Recipients IQ Uploads	×
EN 83 €D ⊗		Here's a test request for a casework Jonathan Kilgore Leidos Knowledge & Training Manager Leidos Digital Solutions, Inc. He'Him'His jonathan.kilgore-2@leidos.comi +1 (703) 994-0480 M Need IQ Training? https://www.intranetquorum.com/calendar	
		Reply Add Message to IQ Add as New IQ Service	00

Replying to Outlook Emails in the My Inbox Application

- 1. Click on the Email you want to reply to and click **Reply** in the reading pane or through the L
- **2.** Match the email with an existing IQ Contact Record. If there is no match, click **Add Contact** to create a new record for the sender of the email.



3. Review the next screen to ensure the fields are correct and tag the message with an issue(s) code as needed. Click **Continue.**

Add Outlook Message to IQ and Respond x								
From: Kilg At: Subject: Help I	re, Jonathan D. [US-US] (6/12/2024 12:56 PM) case							
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		Continue Close						

- **4.** The email has now been added to IQ as a Message and the response window appears, allowing you to review the email and write a custom reply or select a Form Letter as appropriate.
- 5. Click Send when ready.

proved Messa	ge for Mr.	Johnny (. Bravo									
H: (098) 765-432:	1 C: (410) 00	0-0000 C:	(703) 994	4-0480 B: 202-333-6	6556							
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Deny	On noiu	Datti	Jenu	Schedule Send	COIDI	Swap Cont		ci ouigoing copy		Row 1	Jave & Cluse	Jave

Adding Outlook Emails to a New or Existing Service

1. Click on the Email you want to create a new Service for/add to an existing service and click

Add Message to IQ in the reading pane or through the *lie* icon.

2. Match the email with an existing IQ Contact Record. If there is no match, click Add Contact to create a new record for the sender of the email.

Add Outlook N	lessage to IQ and Respond	×
Search for Search by Nameline,		Messages Open: 1 Closed: 4 Services Open: 0 Closed: 1
Prefix Last Name Address	First Name Middle Name	Bravo, Mr. Johnny C. ID: 7118241 12134 Monument Dr., Fairfax, VA Mesages Open: 53 Close Johnnybnickedoem@fakeemail.com, Services Open: 19 Closec (088) 76-4321 (IV).cspan style="text-decoration:line-through;">(410) 000- 00000/cspan (C), 020-33-6555 (B)
City Email	State Zip Q	00004/span>(C), 202-535-656 (b) Frequent Writer - High Volume
Jonathan.Kilgor	Cell Phone Phone Organization	0
Search Affiliation	n v	Add Contact Cancel

- **3.** Review the Selected Contact information and then choose what you would like to do from the following (hover over each option for a tooltip definition if needed):
 - a. Contact Attachment: Adds the email as an attachment to the Contact record.
 - **b.** Attachment to Existing IQ Message: Adds the email as an attachment (.EML file) to an existing IQ Message from a Constituent.
 - c. New IQ Message: Adds the email as a new open IQ Message to reply to.
 - **d.** Attachment to Existing IQ Service: Adds the message as a .EML file attachment for viewing/downloading within an existing Service.
 - e. New Service for Contact: Use the message to create a new Service (such as Casework) for the Contact.
 - f. New Service and Message for Contact: Creates a new Service (such as Casework) for the contact and adds the email as an Open Message to that new service (from which you could then reply to the email).
 - **g.** New Message for Existing Service: Adds the email as a new Open Message for an Existing Service (such as casework).

Add Outlook Message to IQ	×
From:	
۱ (6/12/2024 12:57 PM) Subject: Test Casework Request	
Selected Mr. Johnny C. Bravo 12134 Monument Dr Contact Fairfax, VA 22033-5531	
Save Email Message File(s) in IQ As ● Outlook Message File (.EML) ○ Text File (.HTML)	
Upload Message as IQ Record Type(s)	
O Contact Attachment	
O Attachment to Existing IQ Message	
New IQ Message Message Instructions	
Date in	
06/12/2024	
In Method	
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	<u>//</u>
 Attachment to Existing IQ Service New Service for Contact New Service and Message for Contact New Message for Existing Service 	
	Save Close

- **4.** If you select any of options D-G above, IQ will prompt you to find the existing Service and/or choose what type of service to be created with this email.
- **5.** Click **Save**. Your screen will be brought back to the My Inbox application. Click on **IQ Uploads** in the Reading pane to access the existing service or new service the message has been used for.

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	#6 Added Toda	Electron. Annual france. 20. Tel: 1990 France instantione of general systems and its	Test Casework Request	6/12/2024 12:57 PM Uploaded to IQ as a new Message for a new Service on 2025-04-16.			00

Outlook Event Calendar Sync

- **1.** Navigate to the **Events** application.
- 2. Click on Calendars → My Calendars
- **3.** Click on the icon to edit your selected calendar.
- **4.** Make sure your O365 email is shown in the Outlook ID field, then click on the slider button next to **Synch IQ Link**.
- **5.** Click "Test Modern Sync". If successful, no further action is needed. If unsuccessful, click "get access token" and login.
- 6. IQ5 Events can now be saved and synced with your Outlook.

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General Users						
Calendar Name						
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Add Cale	ndar Users		‡166 w 4			Close

Sending from O365 email within a Service

- **1.** Navigate to the Service of your choice and click on an Open record.
- 2. Click on Send Email.
- 3. Click into the From email address dropdown and select your Office 365 email.
- **4.** Now IQ will send your email using that address and responses received will go into that email inbox (which can be viewed within the **My Inbox** application as noted earlier in this document).

Ξ	My Open Casework ~ Find	$\bigcirc \bigcirc$
創	$ \ \ \ \ \ \ \ \ \ \ \ \ \$	⊖ Row 1 - ID 802269
	OPEN Casework for Mr. Johnny C. Bravo Created 4/16/2025 12:14:42 PM by Summary Messages Contacts Attachments Logs	Activity Send Email Discuss
B 10° C	Assigned: · · · · · Release Updated: 4/16/2025 12:14 PM Description: · · ·	From @leidosdsi.onmicrosoft.com "Office of Congressman John Quorum" DistrictServices@training.Imhostediq.com "Office of Congressman John Quorum" <districtservices@training.imhostediq.com></districtservices@training.imhostediq.com>
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