

## Utilizing Outlook 365 in IQ5



**Market:** House, FSL

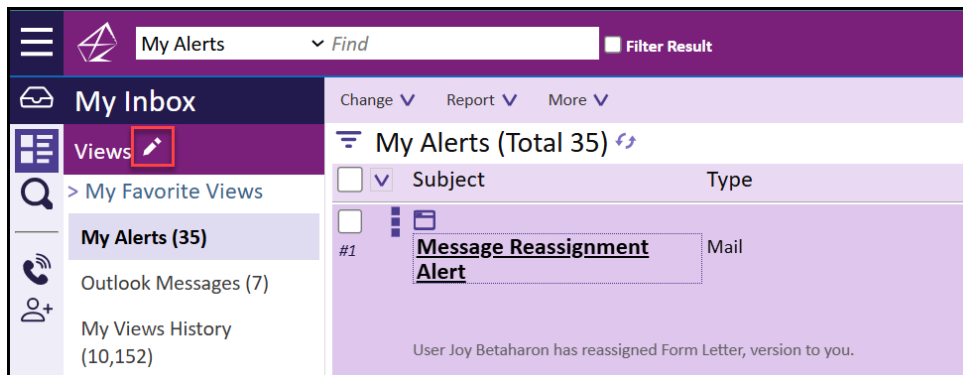
**Description:** IQ5 provides the ability to connect Outlook 365 email accounts to IQ5, allowing for access to your Outlook inbox within the My Inbox IQ5 application, syncing of events between outlook and IQ5 and more. The guide below provides instruction for setting up and utilizing these features.

### Setup

1. Connect your Office 365 account with IQ by going to User Settings → 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  Views icon next to the **Filter List** (if views are not already open).
  - b. Click on the  icon next to **Views**.
  - c. Check the box next to **Outlook Messages**.
  - d. Click **Save**.



**Edit Views Options**

Available List Views for My Inbox  
Check/Uncheck to Add/Remove Options from the My Inbox Views Menu

- ☒ My Alerts
- ☐ My Issue Areas
- ☒ Outlook Messages
- ☐ My Record History
- ☒ My Views History
- ☒ My Open Messages
- ☐ All Open Messages
- ☐ All Open and Unassigned Messages
- ☐ All Open Unbatched
- ☐ My Messages Granted Approval
- ☐ My Messages Denied Approval
- ☐ Messages Needing My Approval
- ☐ My Recently Closed

Reset to Defaults Edit Favorite Views **Save** Cancel

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** → **Switch Folders**

Outlook Messages Search Filter Result

Change More

Switch Folders

Move Messages

Row 1 - ID AAMkADzhOGVhODc3LTl1N2MlN...

	Subject	Received
#1	Re: Another test (IQ IMA00101826)	4/03/2025 11:46 AM Uploaded to IQ as a new Message on 2025-04-04.
#2	Undeliverable: Test (IQ IMA00101703)	12/17/2024 04:32 PM
#3	Declined: JK Test @ Fri Dec 13, 2024 1pm - 3pm (EST)	12/09/2024 06:20 PM
#4	Re: Testing	12/02/2024 04:42 PM Uploaded to IQ as a new Message on 2025-04-02.
#5	Undeliverable: Constituent Services for Congressman John Quorum (IQ IMA00101635)	9/09/2024 03:58 PM
#6	Test Casework Request	6/12/2024 12:57 PM Uploaded to IQ as a new Message on 2025-02-19.

Re: Another test (IQ IMA00101826)

From: [Redacted]  
Received: 4/03/2025 11:46 AM  
To: [Redacted]

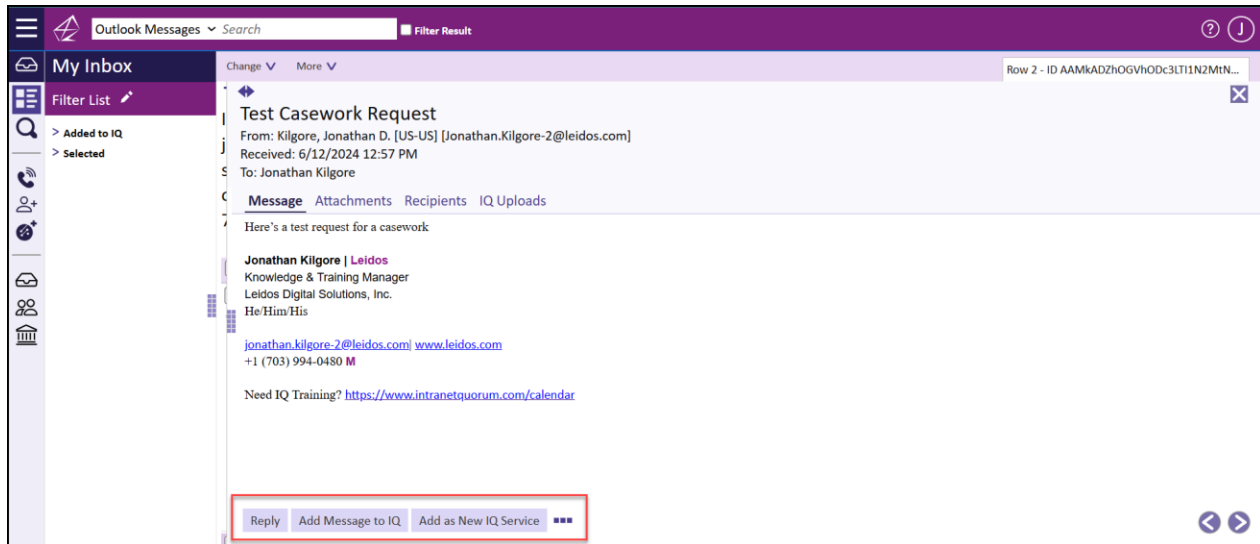
Message Attachments Recipients IQ Uploads

I'm replying to this second email.  
-Joy


On Thu, Apr 3, 2025 at 11:45 AM Jonathan Kilgore wrote:

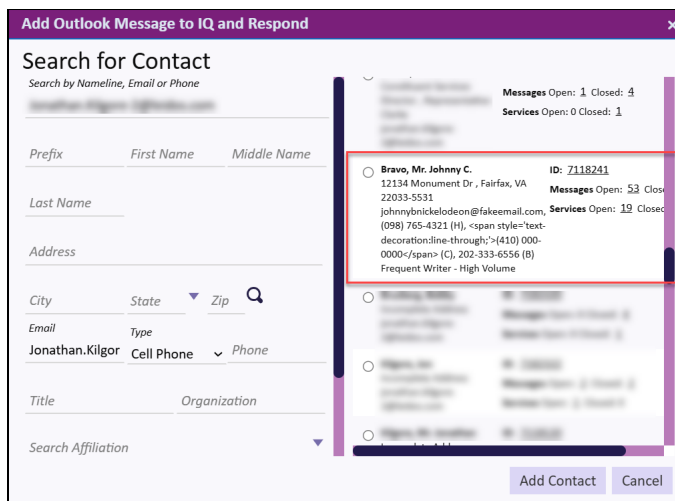
Congress of the U.S.  
House of Representatives  
Washington, D.C.

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



## 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  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.



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

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.

## 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  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 Message to IQ and Respond**

**Search for Contact**  
Search by Name, Email or Phone

Prefix First Name Middle Name

Last Name

Address

City State Zip

Email Type  
Jonathan.Kilgor Cell Phone Phone

Title Organization

Search Affiliation

Messages Open: 1 Closed: 4  
Services Open: 0 Closed: 1

☐ **Bravo, Mr. Johnny C.** ID: 7118241  
12134 Monument Dr, Fairfax, VA  
22033-5531  
Messages Open: 53 Closed: 1  
Services Open: 19 Closed: 1  
johnnybnickelodeon@fakeemail.com,  
(098) 765-4321 (H), <span style="text-decoration:line-through;">(410) 000-0000</span> (C), 202-333-6556 (B)  
Frequent Writer - High Volume

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: [Redacted] (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)  
☐ Contact Attachment  
☐ Attachment to Existing IQ Message  
☒ New IQ Message

Message Instructions

Date In  
06/12/2024

In Method  
E-Mail

Out Method  
E-Mail

Test Casework Request  
Subject

Issues

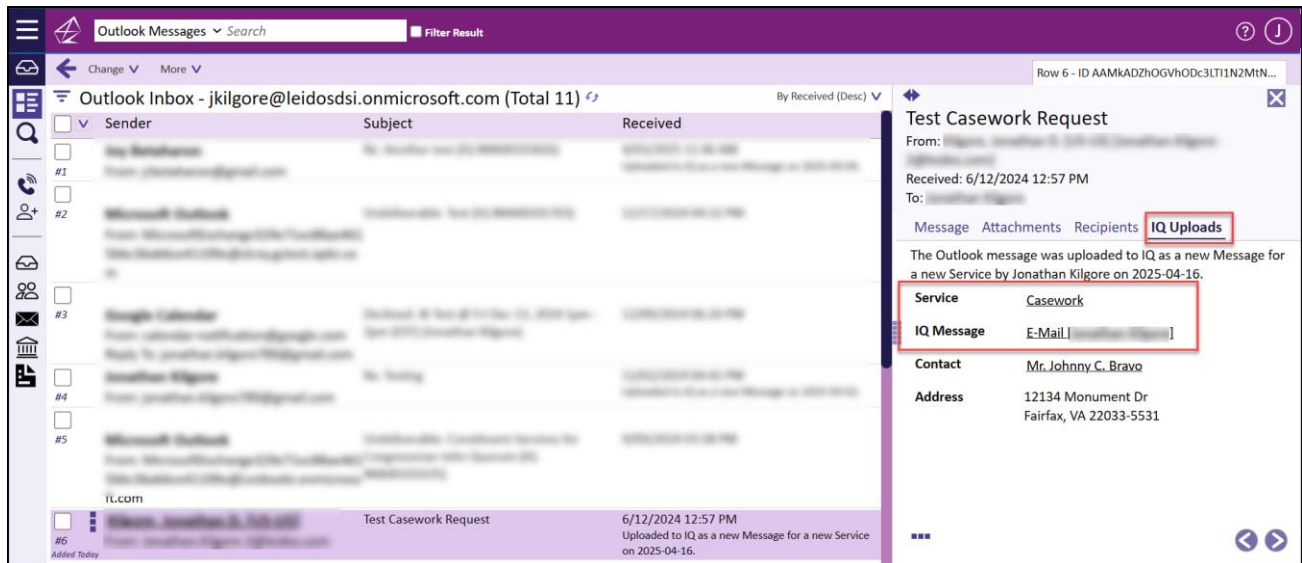
Assigned To

Comments


☐ Attachment to Existing IQ Service  
☐ New Service for Contact  
☐ New Service and Message for Contact  
☐ New Message for Existing Service

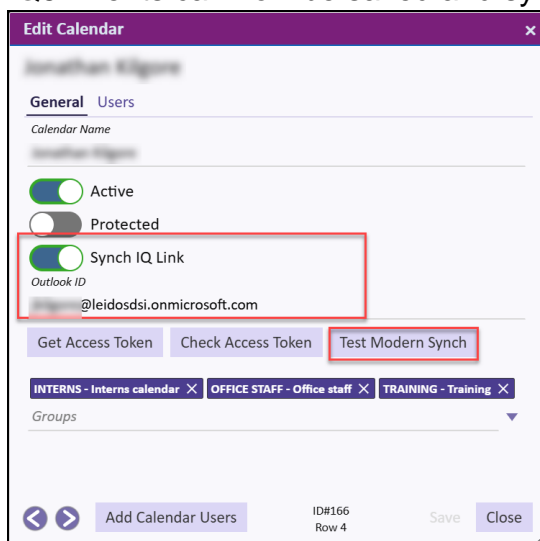
Save Close

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.



## 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.



## 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).

