# 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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3	#1	in history	Re: Another test (IQ IMA00101826)	4/03/2025 11:46 AM Uploaded to IQ as a new Message on 2025-04-04.	From Received: 4/03/2025 11:46 AM To:	
C o(	#2	⊠ 2 Ø Ø Ø Ø Microsoft Outlook	Undeliverable: Test (IQ IMA00101703)	12/17/2024 04:32 PM	Message Attachments Recipients IQ Uploads	
Ø	- 1	From: MicrosoftExchange329e71ec88ae46 5bbc36ab6ce41109e@slcny.gctest.iqdsi.cc m	51		I'm replying to this second email. -Joy	
	#3	Google Calendar From: calendar-notification@google.com	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:	
	#4	Reply To:	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 0 IMA00101635)	9/09/2024 03:58 PM	Congress of t House of d Washingt	he U Repres on, D
	#6	Higher, Anathan S. (M. 19) From Smither Figure (physics one	Test Casework Request	6/12/2024 12:57 PM Uploaded to IQ as a new Message on 2025-02-19.		

**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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	I	Here's a test request for a casework Jonathan Kilgore   Leidos Knowledge & Training Manager Leidos Digital Solutions, Inc. HerHim/His jonathan.kilgore-2@leidos.com  www.leidos.com +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								
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Assigned	Agent .	× <del>•</del>						
Comme	ts	<u>6</u>						
		<b>Continue</b> 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									
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#### 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 Message to IQ and Respond x							
Search for Search by Nameline	r Contact , Email or Phone	Messages Open: 1 Closed: 4 Services Open: 0 Closed: 1					
Prefix Last Name	First Name Middle Name	○ Brave, Mr. Johnny C. 12134 Monument Dr., Fairfax, VA 2003-5531 johnnybnickelodeon@fakemail.com, Services Open: <u>53</u> Close (0901756-613104). Open schellobert.					
Address		(1957) 753-432 (fr), span style - text- decoration.iline-trivouty;>(410) 000- 0000-/span> (C), 202-333-6556 (B) Frequent Writer - High Volume					
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Email	Type Phone	approximate and a second secon					
Title	Organization	0					
Search Affiliatio	n 🔻	0					
		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:	- (5 (12 / 2024 12) E7 DM)	
Subject: Test Ca	(6/12/2024 12:57 PM) isework Request	
Selected Contact	Mr. Johnny C. Bravo 12134 Monument Dr Fairfax, VA 22033-5531	
Save Email Messag Outlook Me	ge File(s) in IQ.As essage File (.EML) ○Text File (.HTML)	
Upload Mes	ssage as IQ Record Type(s)	
O Contact A	Attachment	
O Attachme	ent to Existing IQ Message	
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○ New Serv	vice for Contact	
O New Serv	vice and Message for Contact	
O New Mes	ssage for Existing Service	
	Save Clo	se

- **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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# **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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## 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).

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8 🚯 🛛 🖓 🖌	Updated: 4/16/2025 12:14 PM	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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