

Creating Batch/Auto-Send Rules in IQ5

Market: House, Senate

Description: These instructions teach users how to create **Batch/Auto-Send Rules** which automatically add settings to messages placed in the Batch such as Issue code and Form Letter assigned. IQ then sends the Letter for you on the day(s) of your choice at the time of your choice.

Create a Batch Rule from Batches

1. Navigate to the **Messages** application.
2. Click on the **Batches View**.
3. Select **Response Rule** in-row action for the Batch you'd like to add a rule to.
4. Add your rules such as an Issue code and Form Letter in the Edit Batch Response dialog.

5. Click **Save**.

Create a Batch Rule from Campaigns/Bills/Individual Messages

1. Navigate to the **Messages** application.
2. Click on **Message Processing**.
3. Select the **Batch** action for the **Campaign** or **Bill** you'd like to batch. For **Individual Messages**, select the messages and then click the **Batch** menu action.

Campaigns Without Rule (Total 13)

Campaign Name	Create	Latest	Open	No Batch	Total	Rule
A covid resurgence???	8/23/2023	8/23/2023	3000	3000	3000	No
Home Ownership is out of reach for too many	8/23/2023	8/23/2023	2000	2000	2000	No
Is climate change causing wildfires?	8/23/2023	8/23/2023	2000	2000	2000	No
NO MORE public speakerphone use!	4/14/2023	4/14/2023	1999	1999	2000	No
Require Nutrition Classes in Public Education!	4/14/2023	4/14/2023	1999	1999	1999	No
Pass the Stimulus!	12/29/2020	12/29/2020	498	498	498	No
Save the economy!	4/19/2021	4/19/2021	483	483	505	No
Support HRES 1064	2/8/2021	2/9/2021	202	202	500	No

A covid resurgence???
Created 8/23/2023

Summary Analysis Response/Autosend Discuss Logs

Unbatched Count 3000
Total Count 3000
Variations 2
Batches Unbatched(3000)
Open Count 3000

Responses
Sample Subject More COVID
Sample Message
How can we prevent this resurgence? I do NOT want to mask up again. They weren't even effective. Are we going to need more vaccines? When are we going to get a handle on this craziness? I do not want our children doing remote school. That was a catastrophe!

Batch

- Select an existing Batch from the dropdown or click on the “+” icon to create a new one.

Campaign Batch and Issue Update Rule

All Open and future messages added to this Campaign will have these settings applied.

Batches
☒ All Active Unlocked ☐ Remove Current

All Batches

Issues

Update Cancel

- Review or create the Batch Response rules as in step 4 above.
- Click **Update**.

Create an Auto Send Rule

- Click on a Batch that has a Response Rule.
- Select the **Enable Auto Send** in-row action.
- Add your Auto Send Rules.
- Click Start Auto-Send button.

Set Up Batch Auto-Send

Automatically approve and email all unrestricted open messages in this batch that have an approved version of the letter...

Education061523

Send on these days: ☐ Sunday ☐ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday

Start Sending these messages at 08:00 AM

Messages must be at least 24 hours old before they are eligible for auto-sending.

Stop automatically sending messages on 12/29/2023

Start Auto-Send

Cancel

Note: The “Messages must be at least X hours old” field will tell IQ how old an incoming message must be (how many hours it has been in your IQ system) before your letter will send as a response. This helps ensure a timely response.