

## Creating a New Form Letter from a Custom Reply

**Market:** House, Senate

**Description:** When typing a Custom Reply to a Constituent, you may wish to save that reply as a new Form Letter for future re-use. This guide walks through the process of accomplishing this.

1. Click on **Reply** for the Open Message you are typing your Custom Response to.

The screenshot shows the 'All Open Messages' interface. A list of messages is displayed, including one from 'Ms. Joan Roque' with the subject 'Please help me expedite my passport!'. The 'Reply' button for this message is highlighted with a red box. The right-hand pane shows the details of the selected message, including the source (E-Mail) and the subject line.

2. Click on **Custom Reply** and type out your response.

The screenshot shows the 'Approved Message for Ms. Joan Roque' dialog box. The 'Custom Reply' button is highlighted with a red box. The dialog box contains fields for 'To', 'Subject', 'Issues', and 'Form Letter'. The 'Form Letter' field is currently empty. The 'Custom Reply' button is located next to the 'Form Letter' field. The bottom of the dialog box contains buttons for 'Deny', 'On Hold', 'Batch', 'Send', 'Schedule Send', 'Color', 'Swap Contact', 'Edit Contact', 'Outgoing Copy', 'Save & Close', 'Save', and 'Close'.

3. Type out a name for your new Form Letter under **Letter Name**, then click on **Save as New Form Letter**.

4. A confirmation page will appear. Click **Continue**.

5. Your New Custom Letter has now been saved as a new Draft Form Letter. Note that this letter will have to approved in order to be sent.

On Hold Message for Ms. Joan Roque

Response More Preview

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To

jrbehaharon@gmail.com \*

▼

Cc/Bcc

From

▼

Subject

▼

Issues

▼

Form Letter

New Custom Form Letter JK (D)

✕

🔍

📄

☐

Limit to Codes

🔗

Customize Letter

☐

Include History

Method Out

E-Mail

▼

Assigned To

Joy Betaharon

✕

▼

Comments

Add Discussion Message...

Alert these Users or Groups

▼

Post

↺

Here's my custom response I want to save as a new form letter!

Jonathan Kilgore | leidos

IQ Knowledge & Training Manager | Leidos Digital Solutions, Inc.

Mobile: 703.994.0480

He/Him/His

Approve

Request Approval

Deny

Batch

Preview

Color

Swap Contact

Edit Contact

Outgoing Copy

ID#5059716

Row 1

Save & Close

Save

Close

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