

Utilizing Outlook 365 in IQ5



Market: House, FSL

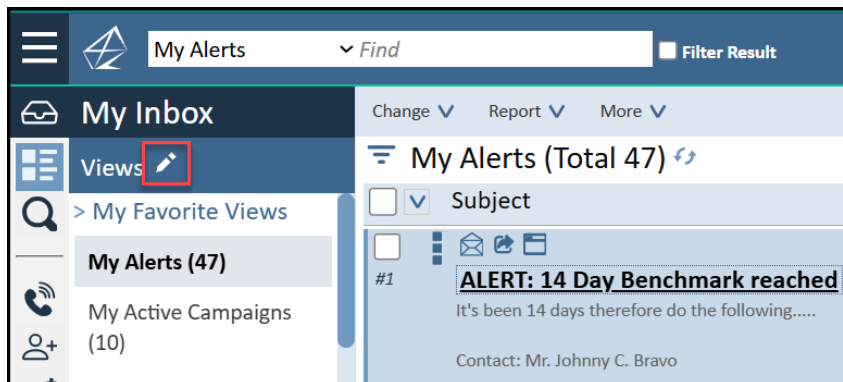
Description: IQ5 provides the ability to connect Outlook 365 email accounts to IQ5, allowing for access to your Outlook inbox within the My Inbox IQ5 application, syncing of events between outlook and IQ5 and more. The guide below provides instruction for setting up and utilizing these features.

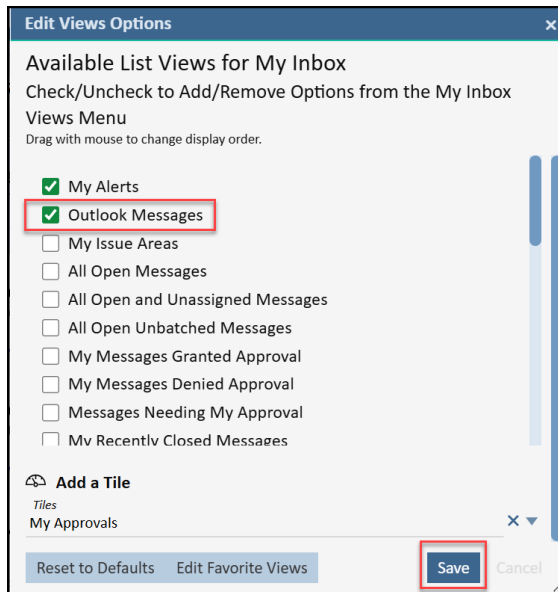
Setup

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.

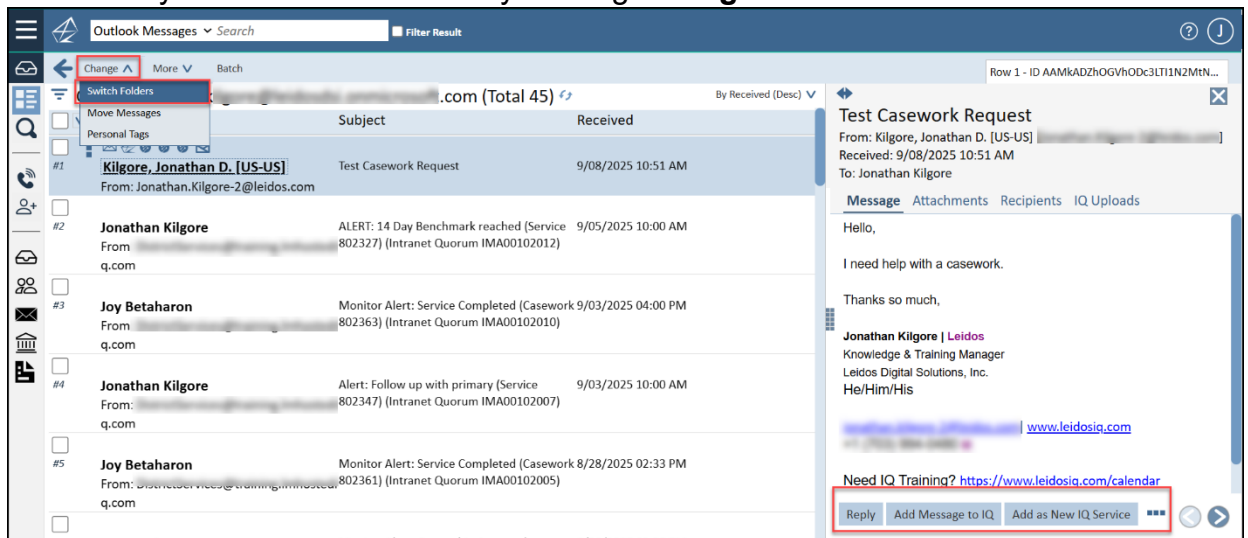
Viewing Outlook Emails in the My Inbox Application



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**.

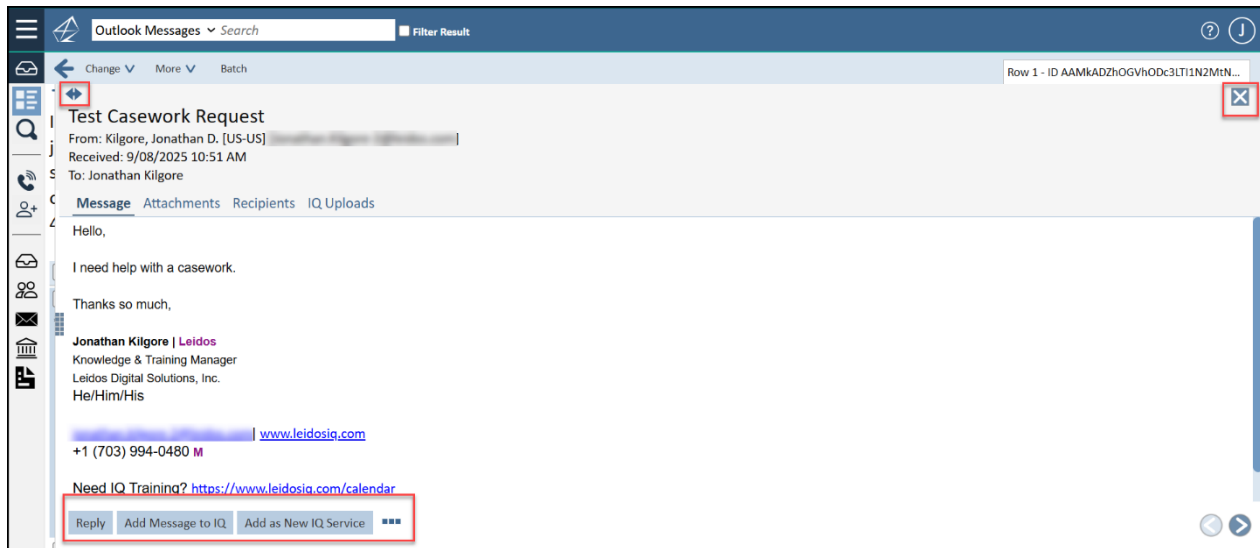





3. You can now see all of your outlook emails (as well as your sent and other folders), reply from in IQ, or add them to IQ as a new Message and/or Service (such as a Casework).
- a. *Note that you can switch folders by clicking **Change** → **Switch Folders**

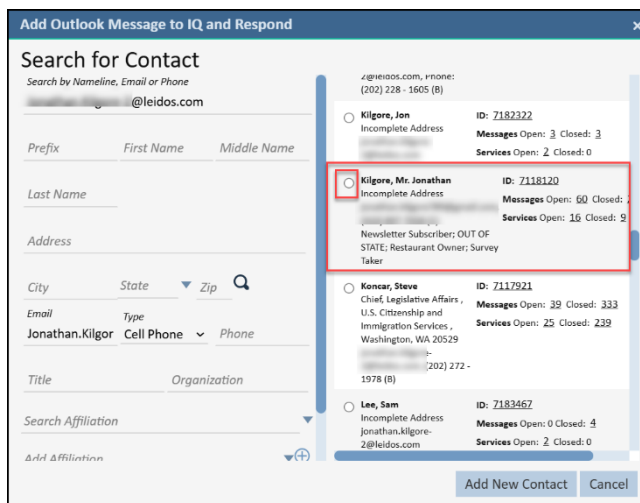


4. Click the Email in the List or the  button to see it in more detail. Click the  button to return the reading pane back to it's previous size or click the X button in the top right corner to close the reading pane entirely.



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.
 - a. **Note:** If the email in your Outlook is related to an existing Service, you may see the option to **Add to Source Service as New Message**. Choose this option if adding the email to the already existing Service.
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

Add Affiliations

z@leidos.com, rnone:
(202) 228 - 1605 (8)

- ☐ Kilgore, Jon ID: 7182322
Incomplete Address Messages Open: 3 Closed: 3
Services Open: 2 Closed: 0
- ☒ Kilgore, Mr. Jonathan ID: 7118120
Incomplete Address Messages Open: 60 Closed: 1
Services Open: 16 Closed: 9
Newsletter Subscriber; OUT OF STATE; Restaurant Owner; Survey Taker
- ☐ Koncar, Steve ID: 7117921
Chief, Legislative Affairs, U.S. Citizenship and Immigration Services, Washington, WA 20529 Messages Open: 39 Closed: 333
Services Open: 25 Closed: 239
- ☐ Lee, Sam ID: 7183467
Incomplete Address Messages Open: 0 Closed: 4
Services Open: 2 Closed: 0

Add New 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: Kilgore, Jonathan D. [US-US]
At: Jonathan.Kilgore-2@leidos.com (9/08/2025 10:51 AM)
Subject: Test Casework Request

Selected Mr. Jonathan Kilgore Incomplete Address

Contact

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
09/08/2025

In Method
E-Mail

Out Method
E-Mail

Test Casework Request

Subject

Issues

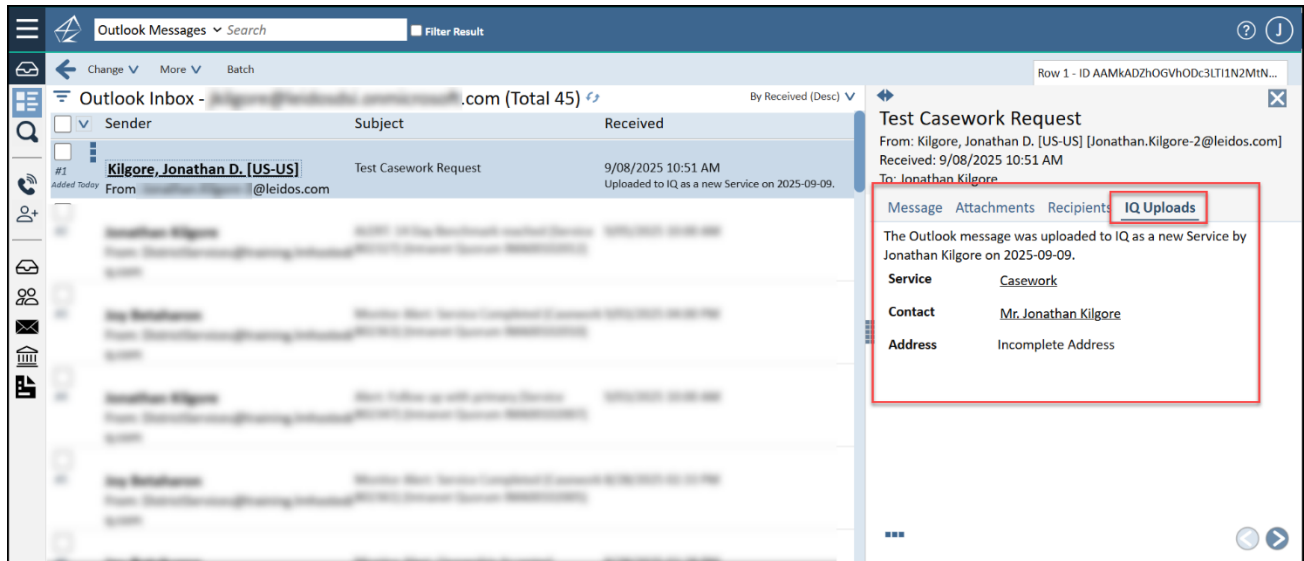
Jonathan Kilgore X Assigned To

Comments


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

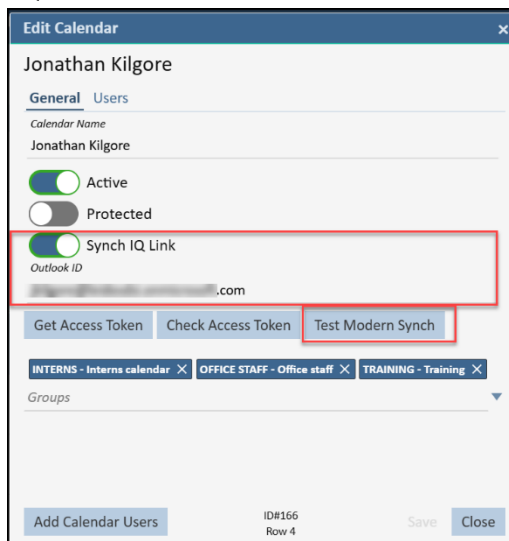
Save Close

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

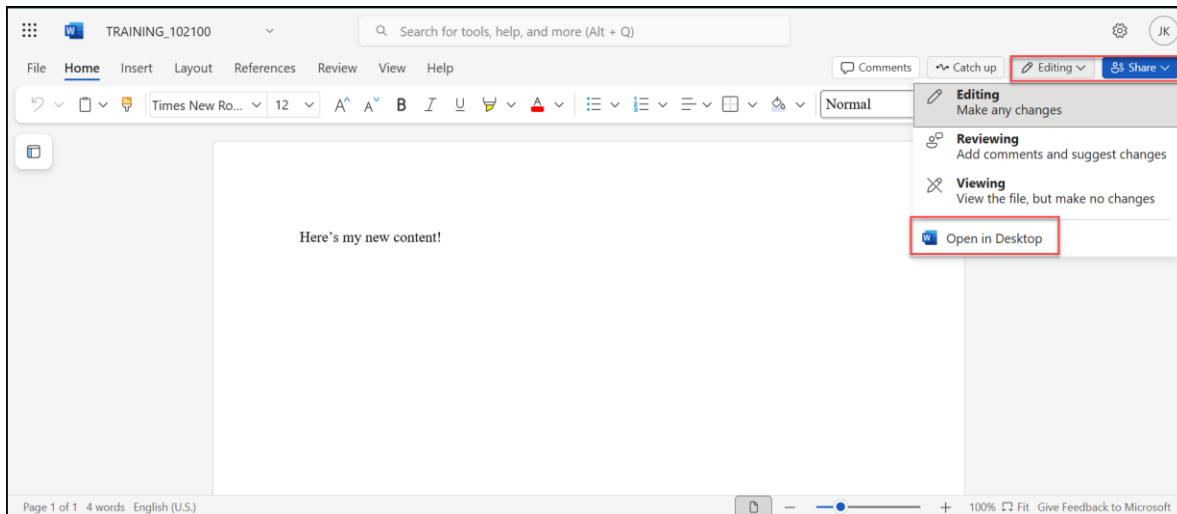
1. Navigate to the Service of your choice and click on an Open record.
2. Click on **Send Email**.
3. Click into the **From** email address dropdown and select your Office 365 email.
4. Now IQ will send your email using that address and responses received will go into that email inbox (which can be viewed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

Editing Form Letters with Office 365

1. Create your New Form Letter in IQ, then click on **Check Out to OneDrive**.

Document	Created	Assigned	Size	Status	Revised
#1 September Test Letter v.1	9/5/2025	Jonathan Kilgore	23kb	Draft	9/5/2025
#2 HOME OWNERSHIP OUT OF REACH v.1	9/2/2025	Jonathan Kilgore	23kb	Request Approval (by Joy Betaharon)	9/2/2025
#3 WILDFIRES AND CLIMATE CHANGE v.1	8/28/2025	Jonathan Kilgore	23kb	Request Approval (by Joy Betaharon)	8/28/2025
#4 Form Letter Workshop 82725 v.1	8/27/2025	Jonathan Kilgore	24kb	Request Approval (by Joy Betaharon)	8/27/2025
#5 Assistance with Passport Application v.2	8/27/2025	Jonathan Kilgore	23kb	Draft	8/27/2025
#6 New Test Letter 82625 v.1	8/26/2025	Jonathan Kilgore	23kb	Draft	8/26/2025
#7 BETTER NUTRITION IN SCHOOLS v.1	8/26/2025	Jonathan Kilgore	23kb	Request Approval (by Joy Betaharon)	8/26/2025
#8 HOME OWNERSHIP IS	8/22/2025	Jonathan Kilgore	23kb	Approved	8/22/2025

2. IQ will then open up the Draft Form Letter within the browser version of Microsoft Office Word 365. You can then choose to Edit within the browser or open within the Word Application itself. The document may be shared within 365 with others for further collaboration.



3. When ready, click **Check in from OneDrive** and IQ will pull the latest autosaved version of your Form Letter from Word 365.
 - a. **Note:** To easily find all your Form Letters that are checked out to OneDrive, add the new view, **All OneDrive Form Letters**.

