Utilizing Sets in IQ5

Market: Federal/State/Local, House, Senate

Description: The IQ Sets feature allows you to load Contact information into the database from a source file (i.e. .csv, comma or tab delimited .txt) and also processes certain types of incoming emails. Sets that contain incoming emails are not automatically "posted" into IQ. These incoming emails are captured in different types of Sets, which allow you to make the choice to include them as Message records in IQ, or to delete the emails before they become Message records. In this way, you can eliminate "junk" emails or correct incorrect email addresses without creating a record in your database

Email Sets

Email Sets display incoming emails that have been processed through the Internet Mail Agent (IMA). Your office may have set up rules to place incoming emails into particular sets based on key words in the content of the email or based on location of the sender. Each office may have a few or many Email Sets depending on the processes used to sort and assign incoming email correspondence.

Process Email Sets
You can change information in Set records at any time prior to posting the records. Records can be changed individually using Row Actions or updated as a group using the Change options.

1. To process Email sets, Navigate to the **Messages** application, click on **Sets**.
2. Click the **Set Name** to view all records in the Set. These records have not yet been posted into IQ - you will need to determine which records will become IQ Message records. Each correspondent in the Set record is either matched to an existing Contact record or IQ will create a new Contact record if a match cannot be found and New Contact... will appear above the record.

Search Again

If IQ has mismatched Contact records, you can use the option to Search Again.

1. Click on the three dot icon found in the Row or the Reading pane and select **Search Again**.

2. Use the Search screen to find potential contact matches for the email. If there is a match, click the radio button next to the contact to match them. If not, click on **Add New Contact.**

Post To Messages

1. If you would like to post the Email(s) to your All Open Messages:
   a. Click the three dot icon next to the Email, click Post to Messages OR Select multiple messages → Change → Post to Messages.

   b. The **Post to Messages** dialogue will appear allowing you to assign **comments, issue codes, affiliation codes, Bill information, Outgoing Method, Salutation, Assigned To, and Letter Name.**
   c. After making your choices choose to either **Batch** or **Save.** Clicking Batch will save your choices and bring you to the batching screen. Save will just post your message(s) to All Open Messages.

Post to Messages ✕

9 records may be posted. 8 records do not have selected Contact and cannot be posted.

Comments

○ Add to existing ○ Update if empty ○ Remove existing

Issues ▼ ⊕

○ Remove other Issues ○ Remove selected Issues ○ Remove all Issues

Affiliations ▼

Bill ▼

○ Supports ○ Opposes ○ No Position

Outgoing Method ⌄   *Salutation* ▼

Assigned To ▼   ☐ Include History

Letter Name ▼   ☐ Remove Letter

Batch   Save Close

View Contact

1. You can edit the Contact record by clicking the 🖊 in row action or the **Edit Contact** button in the Reading Pane.
2. The Contact record opens and you can edit any information in the record.

Edit Transcription

1. Use the three dot icon to then click **Edit Transcription** if necessary for the email.
2. IQ displays the updated Transcription below the pdf link of the incoming email in the expanded view of the Record and in the Reading Pane.

Forward

1. You can forward an incoming email to another member/organization, if it is from a non-constituent, by selecting the **Forward** in-row action.

2. IQ displays the **Forward E-mail** dialog. The To, CC and BCC fields contain a list of IQ users. You can, however, type an external email address (i.e. william.smith@mail.house.gov).

3. The **Subject** field defaults to "FW:" and the incoming email is attached as a .eml file.

4. IQ populates the message text with "The attached email message has been forwarded to you. Any additional files are attachments of this original inbound message." You may edit or remove this message text.

5. The contents of the incoming email is displayed below the message text, but is not included in the forwarded email unless you check it. If, however, you select it, then the attached .eml file will NOT be included.

6. Click the **Send Email** button at the bottom to forward the email. IQ displays "Message sent." Click **OK** to close it.

Delete

1. If you would like to delete the Set record without creating an IQ Message record, use the **Delete** action found by clicking the three dot icon. This will delete the Set record from the database.

Exception Set

IQ automatically creates an Exception Set to capture incoming emails, which have not been processed by an IMA rule. Often these emails are considered "junk emails" and are not high priority. You should, however, check the Exception Set on occasion, and delete any emails you do not want to process into your IQ database. Process Messages here using the same steps as above.

Nondeliverable Set

The Nondeliverable Set is composed of emails that have been sent out by your office and have bounced back, either due to the fact that the email address was not correct, or that the recipient's inbox is full. In either case, you will want to address these emails, either by enabling the Nondeliverable Rules to process the records automatically or by manually reviewing the records in the Nondeliverable Set.

The Nondeliverable Set can be accessed from the **Utilities** section in the **Messages** menu. Outgoing email messages returned or "bounced back" as undeliverable will be added to this set. A "hard bounce-back" email is one that is sent to a non-existent email address. A "soft bounce-back" is an email that is returned, because the recipient's email box is full. These messages should be reviewed and compared against the IQ Contact records that match the email address used in the outbound message.

If the returned email contains only one intended recipient, then IQ will search for an existing Contact record. If only one match is found, IQ displays it in the **Found...** column. If no match or more than one match is found the **Found...** column is not updated. You can use the **Search Again** in-row action to search for and select the appropriate match.