

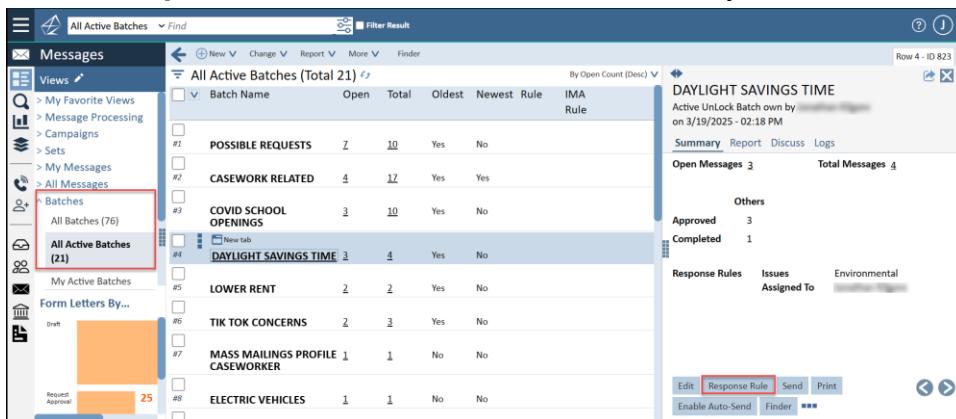
Creating Batch/Auto-Send Rules in IQ5

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.

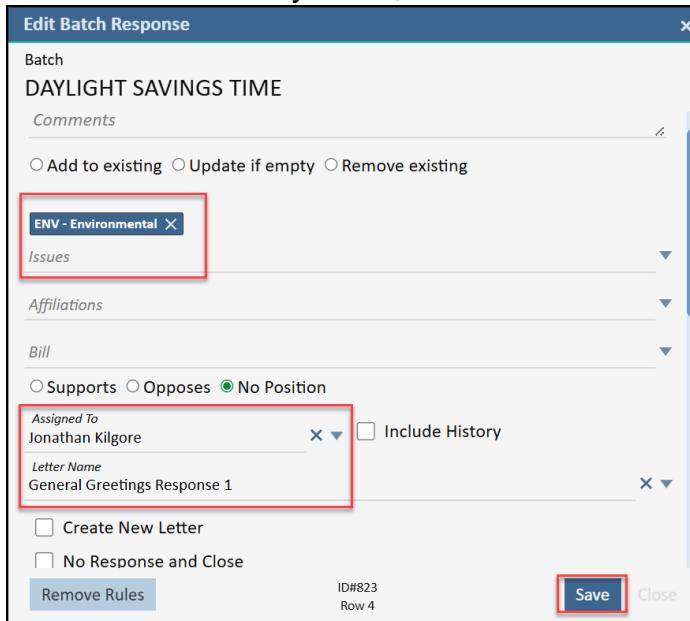
Create a Batch Rule from Batches

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.



The screenshot shows the 'All Active Batches' list in the IQ5 application. A specific batch, 'DAYLIGHT SAVINGS TIME', is selected. The 'Edit' and 'Response Rule' buttons are visible at the bottom of the list. The 'Response Rule' button is highlighted with a red box.

4. Add your rules in the Edit Batch Response dialog. The **Best Practice** is to include at least **one issue code, a staffer in Assigned To and a selected Form Letter** (assuming one has been created already. If not, check the box **Create New Letter**).



The screenshot shows the 'Edit Batch Response' dialog for the 'DAYLIGHT SAVINGS TIME' batch. The 'Assigned To' field (containing 'Jonathan Kilgore') and the 'Letter Name' field (containing 'General Greetings Response 1') are both highlighted with red boxes. The 'Save' button at the bottom right is also highlighted with a red box.

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.

The screenshot shows a list of messages under 'Campaigns Without Rule'. The first message, 'The Price of Eggs is Outrageous!!', has a red box around its 'Batch' button. The right panel shows the message details with a red box around its 'Batch' button.

4. For **Individual Unprocessed Messages**, select the messages you would like to Batch (utilize **Filters** and **Searching** to help narrow your selection), then click the **Batch** menu action.

The screenshot shows a list of individual unprocessed messages. A red box highlights the 'Batch' button in the top menu. The list shows several messages with checkboxes. The right panel shows the details for the first selected message, 'Approved E-Mail', with a red box around its 'Batch' button.

5. Select an existing Batch from the dropdown or click on the "+" icon to create a new one.

Message Batch Update

905 Message Records

Batches

All Active Unlocked Remove Current

All Batches

▲ +

APRIL 6 - GRAD STUDENTS FOR BETTER PAY (3956) - Jonathan Kilgore - has rule
CASEWORK RELATED (17) - Profile Caseworker - has rule
CLIMATE CHANGE (0) - Jonathan Kilgore
COVID SCHOOL OPENINGS (10) - Jonathan Kilgore - has rule
COVID19 (3051) - Joy Betaharon
DAYLIGHT SAVINGS TIME (4) - Jonathan Kilgore - has rule
ELECTRIC VEHICLES (1) - Joy Betaharon
EQUITABLE EDUCATION RESPONSE BATCH (0) - Jonathan Kilgore - has rule

6. Review or create the Batch Response rules as in step 4 above by clicking the Pencil icon.

Message Batch Update

905 Message Records

Batches

All Active Unlocked Remove Current

All Batches

EQUITABLE EDUCATION RESPONSE BATCH (0) - Jonathan Kilgore - has rule X ▾ +

Response Rules Pencil	Issues	Education
Assigned To	Joy Betaharon	
Letter Name	EQUITABLE EDUCATION RESPONSE BATCH	
Autosend Rules	Pencil	

7. Click **Update**.

8. Note that the next time you come to the Batching screen, you will see a list of **Recently Used Batches**, allowing for faster Batching for Messages of the same topic in the future.

Create an Auto Send Rule

Auto Send Rules allow a Batch to automatically reply to Open Messages within it on a set schedule of your choice. You can create/edit the Auto Send Rule from the Batching screen (as seen above) or by navigating to the Batch view within the Messages application and following these steps:

1. Click on a Batch that has a Response Rule.
2. Select the **Enable Auto Send** in-row action.

The screenshot shows the IQ software interface. On the left, a sidebar menu includes 'Messages', 'Views', 'Campaigns', 'Sets', 'My Messages', 'All Messages', 'Batches', and 'All Active Batches (21)'. The 'All Active Batches (21)' item is highlighted with a red box. The main area displays a table titled 'All Active Batches (Total 21)' with columns: Batch Name, Open, Total, Oldest, Newest, Rule, and IMA Rule. The 'LOCAL ECONOMY ISSUES' batch is selected and shown in a detailed view on the right. The detailed view includes a summary table with 'Open Messages 1' and 'Total Messages 3,007'. It also shows 'Response Rules' (Approved 1, Completed 3,006), 'Issues' (Budget and Economy; Housing and Urban Development), and 'Assigned To' (Letter Name LOCAL ECONOMY ISSUES 8923). At the bottom of the detailed view, there are buttons for 'Edit', 'Response Rule', 'Send', 'Print', 'Enable Auto-Send' (which is also highlighted with a red box), and 'Finder'.

3. Add your Auto Send Rules.
4. Click Start Auto-Send button.

The dialog box is titled 'Set Up Batch Auto-Send' and is for the 'LOCAL ECONOMY ISSUES 8923' batch. It contains the following fields:

- 'Automatically approve and email all unrestricted open messages in this batch that have an approved version of the letter...' checkbox.
- 'LOCAL ECONOMY ISSUES 8923' title.
- 'Send on these days:' checkboxes for Sunday through Saturday, with Tuesday, Wednesday, Thursday, and Friday checked.
- 'Start Sending these messages at' time selector set to 08:00 AM.
- 'Messages must be at least' input field set to 48 hours old.
- 'Stop automatically sending messages on' date selector set to 11/15/2023.
- 'Start Auto-Send' and 'Cancel' buttons at the bottom.

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.