

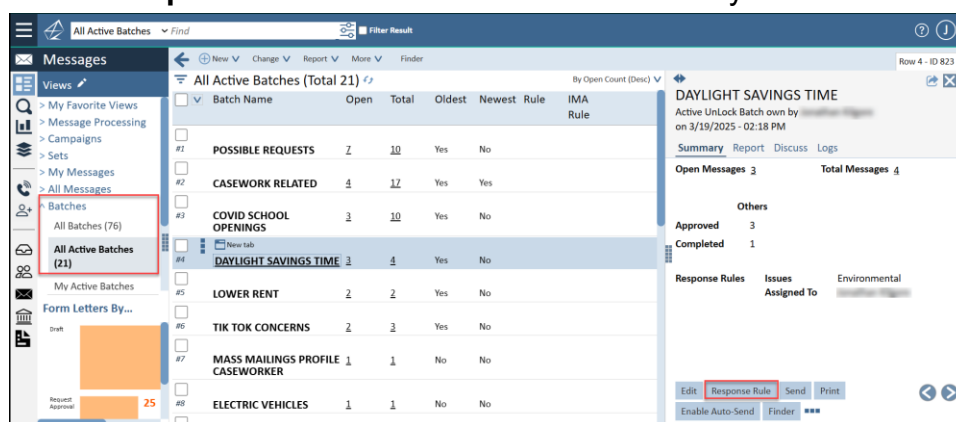
Creating Batch/Auto-Send Rules in IQ5

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 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 box. The 'Batch' field is set to 'DAYLIGHT SAVINGS TIME'. The 'Comments' field is empty. The 'Add to existing' radio button is selected. The 'Issues' field is set to 'ENV - Environmental'. The 'Assigned To' field is set to 'Jonathan Kilgore'. The 'Letter Name' field is set to 'General Greetings Response 1'. The 'Create New Letter' checkbox is checked. The 'Save' button is highlighted with a red box.

5. Click **Save**.

Create a Batch Rule from Campaigns/Bills/Individual Messages

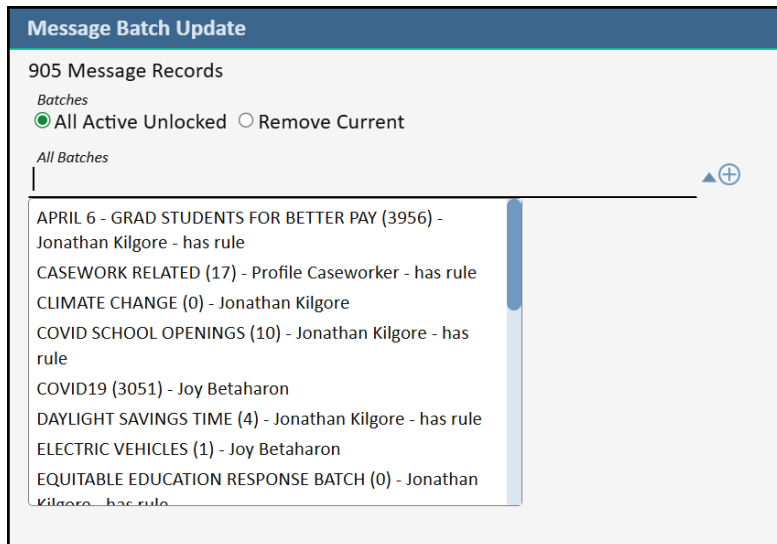
1. Navigate to the **Messages** application.
2. Click on **Message Processing**.
3. Select the **Batch** action for the **Campaign** or **Bill** you'd like to batch.

The screenshot shows the 'Messages' application interface. On the left, the 'Message Processing' menu is expanded, and 'Batch' is highlighted. The main table displays a list of campaigns. The first campaign, 'The Price of Eggs is Outrageous!!', is selected. The right sidebar provides details for this campaign, including its creation date (2/6/2025), unbatched count (2000), and assigned user (No Assigned User).

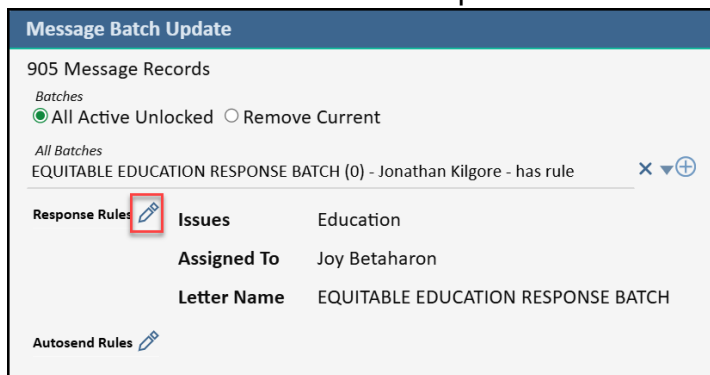
4. For **Individual Unprocessed Messages**, select the messages you would like to Batch (utilize **Filters** and **Searching** to help narrow your selection), then click the **Batch** menu action.

The screenshot shows the 'Messages' application interface with the 'Individual Unprocessed Messages' view selected. The 'Batch' button is highlighted in the top toolbar. The table lists individual messages. The first message, 'Approved E-Mail', is selected. The right sidebar provides details for this message, including its date (12/15/2025), assigned user (Joy Betaharon), and response (FORMAL - Dr. Quorum).

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



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



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 'All Active Batches' list with the following data:

Batch Name	Open	Total	Oldest	Newest	Rule	IMA Rule
ELECTRIC VEHICLES	1	3,051	No	No		
COVID19	1	22	No	No		
MARCH COVID BATCH	1	1	No	No		
GUN CONTROL	1	1	No	No		
LOCAL ECONOMY ISSUES	1	3,007	Yes	No		
MASS MAILINGS PROFILE CASEWORKER	1	1	No	No		
STUDENT LOAN FORGIVENESS - CON	2		Yes	No		
TODAYS CALLS BATCH			No	No		
MEDICAID ISSUES	1		Yes	No		

The details for the 'LOCAL ECONOMY ISSUES' batch are shown on the right, including the 'Enable Auto-Send' button.

3. Add your Auto Send Rules.
4. 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...

LOCAL ECONOMY ISSUES 8923

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

Start Sending these messages at 08:00 AM

Messages must be at least 48 hours old before they are eligible for auto-sending.

Stop automatically sending messages on 11/15/2023

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.