

Batching Messages in IQ5

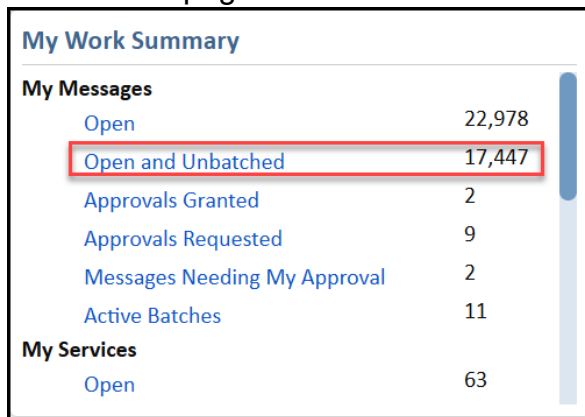
Market: Federal/State/Local, House, Senate

Description: Mail that comes into IQ that is not sorted as a **Bill Related Message** or a **Campaign Message** is considered an **Individual Message**. These individual messages can either be placed into **Batches** or can be responded to one at a time. To optimize the correspondence for these individual messages, the best practice is to **Batch** individual messages that have common attributes (i.e., issues) and reply to all using a **Form Letter**.

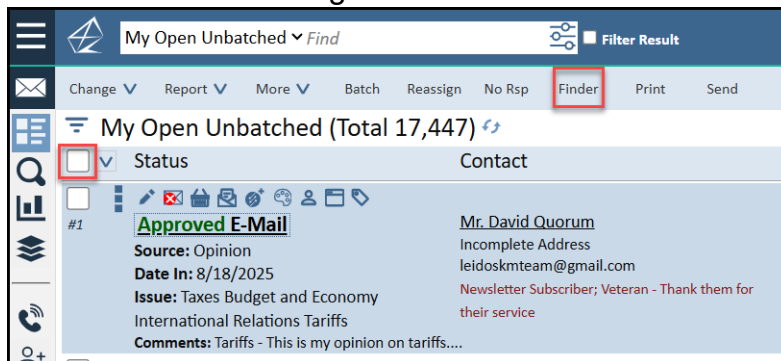
These instructions teach users how to find and Batch Individual Messages assigned to a user in IQ. For instructions on how to send responses to messages, see the **Replying to Emails or Printing Letters** guides.

Batching with the Finder Tool

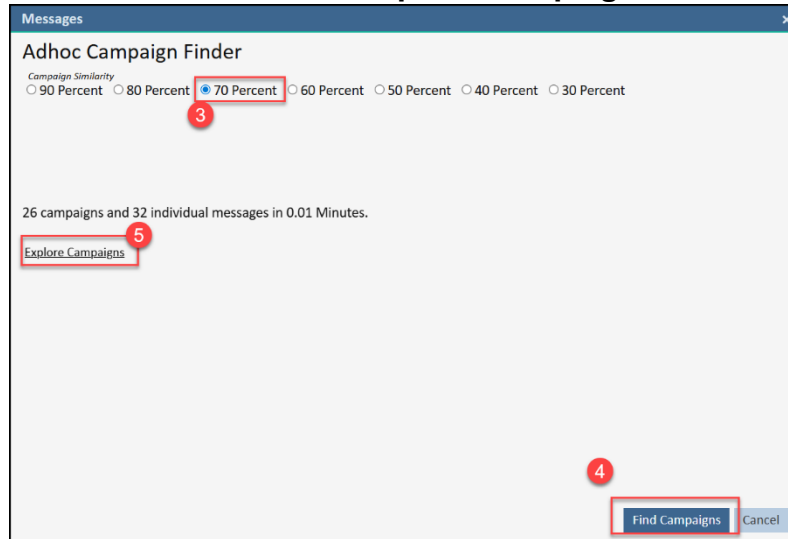
1. Using the **My Work Summary** tile on the Homepage, click on **My Open Unbatched Messages**.
 - a. ***Note:** If you do not have the My Work Summary tile, scroll to the bottom of your homepage and click on the **Add Tile** button to find/add it.



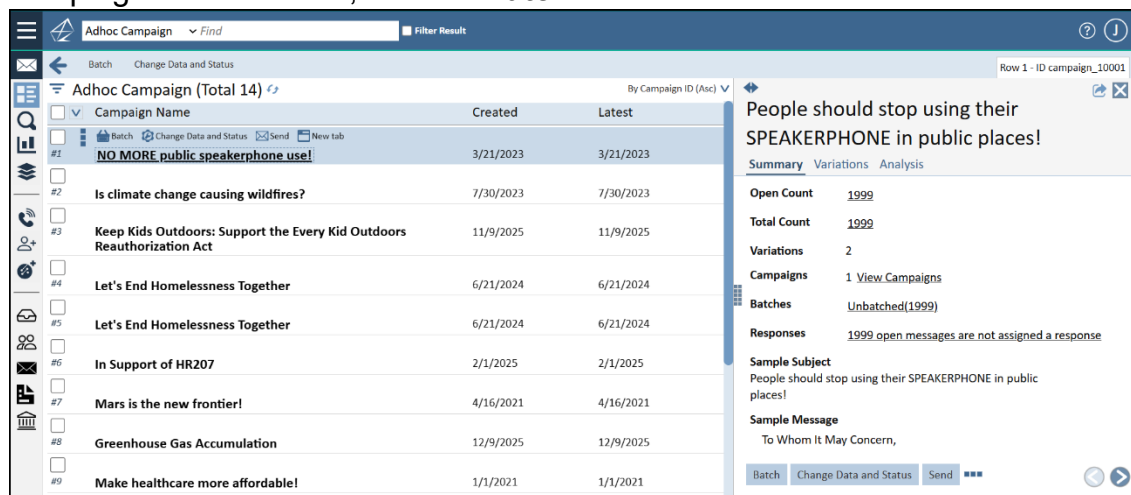
2. Select all of the Messages → Click on **Finder**.




3. Choose a percent similarity for IQ to search for amongst all of the selected **emails**.
4. Click on **Find Campaigns**.
5. IQ has now looked through all the emails in the selected list and found potential “campaigns” that can be batched, as well as separated out the individual emails that did not meet the chosen criteria. Click on **Explore Campaigns**.



6. Click on a found campaign and read the sample Subject and Message. Once the topic of the campaign is understood, click on **Batch**.



7. Click into the **All Batches** dropdown to select an existing batch. If no Batch exists, click on the  icon to create a new Batch.

Campaign Message Batch Update

Batches
☒ All Active Unlocked ☐ Remove Current

All Batches

Recently Used Batches
 TARIFFS- AUG 20 (19) - has rule
 EQUITABLE EDUCATION BATCH JUNE 10 (2000) - has rule
 EDUCATION BATCH (25) - J

Issues

Update Cancel

8. Review or Create the **Batch Rules**. These will determine what settings are applied to messages that go into the Batch, such as the **Issue Codes**, the **Staffer Assigned** the Messages, and what **Form Letter** response will be assigned.

9. Click **Update**.

Campaign Message Batch Update

Batches
☒ All Active Unlocked ☐ Remove Current

All Batches
 CLIMATE CHANGE (1) - has rule

Response Rules
 Issues: Environmental
 Assigned To:
 Letter Name: CLIMATE CHANGE

Autosend Rules

Issues


Update Cancel

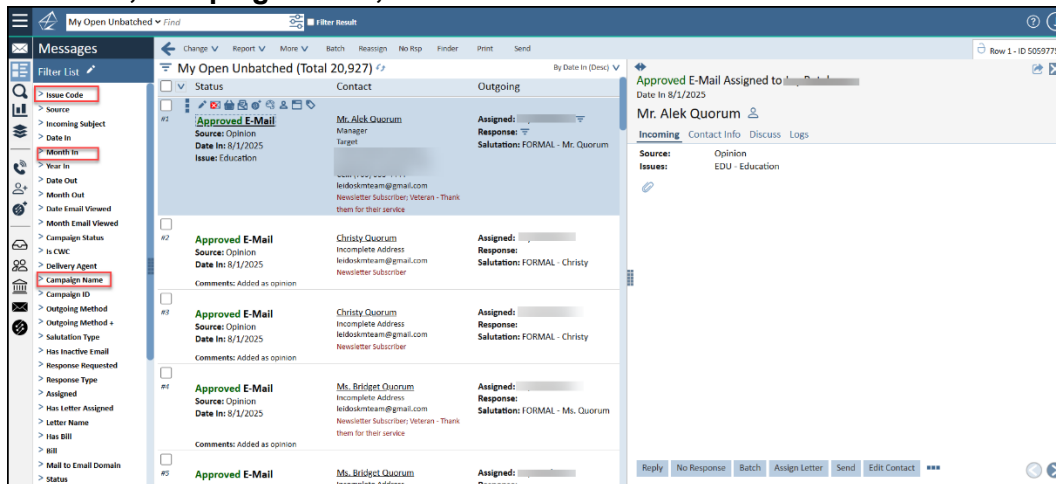
Batching with Filters & Key Words


1. Using the **My Work Summary** tile on the Homepage, click on **My Open Unbatched Messages**.

My Work Summary

My Messages	
Open	22,978
Open and Unbatched	17,447
Approvals Granted	2
Approvals Requested	9
Messages Needing My Approval	2
Active Batches	11
My Services	
Open	63

- Click on the  icon to open up the **Filters**.
- Click on **Filters** that will help identify Messages that are similar to each other, such as **Issue Code**, **Month In**, **Campaign Name**, etc.



- Review the Messages in the list and either:
 - Select all of the Messages → Click on **Batch** → follow steps 6-8 above.
 - Select only certain messages that match → Click on **Batch** → follow steps 6-8 above.
- Use the **Search Bar** at the top of the page to type in Key Words that can also help to find similar Messages.
 - Utilize the  icon for more advanced options.

My Open Unbatched Find Filter Result

Messages

Filter List

Selected Filters:

- ENV-Environmental
- Issue Code
- NONE (5,445)
- AGR-Agriculture (4)
- BORDER SECURITY- Border Security Issues (500)
- BUD-Budget and Economy (495)
- ECON-Economy (1)
- EDU- HYBRID LEARNING-Education (2,001)
- EDU-Education (2,485)
- ENV-Environmental (1,999)
- HEA-Health (1,001)
- HEA-N-Health - Neutral (500)

Show More...

> Source

> Incoming Subject

> Date In

> Month In

My Open Unbatched (Total 20,927 / 1,999 of 1,999 Selected)

Change Report More Batch Reassign No Resp Finder Print Send

Row 1 - ID 5 By Date In (Des

Status	Contact	Outgoing
#1 <input checked="" type="checkbox"/> Approved E-Mail Source: E-Mail Date In: 8/23/2023 Issue: Environmental Subject: Is climate change causing wildfires? Incoming Message: Preview is not available!	L2 contact	Assigned: Response: Salutation: FORMAL - Paul
#2 <input checked="" type="checkbox"/> Approved E-Mail Source: E-Mail Date In: 8/23/2023 Issue: Environmental Subject: Is climate change causing wildfires? Incoming Message: Preview is not available!	L2 contact	Assigned: Response: Salutation: FORMAL - Fernando
#3 <input checked="" type="checkbox"/> Approved E-Mail Source: E-Mail Date In: 8/23/2023 Issue: Environmental Subject: Is climate change causing wildfires? Incoming Message: Preview is not available!	L2 contact	Assigned: Response: Salutation: FORMAL - Catherine
#4 <input checked="" type="checkbox"/> Approved E-Mail Source: E-Mail Date In: 8/23/2023	L2 contact	Assigned: Response: Salutation: FORMAL - Magda