

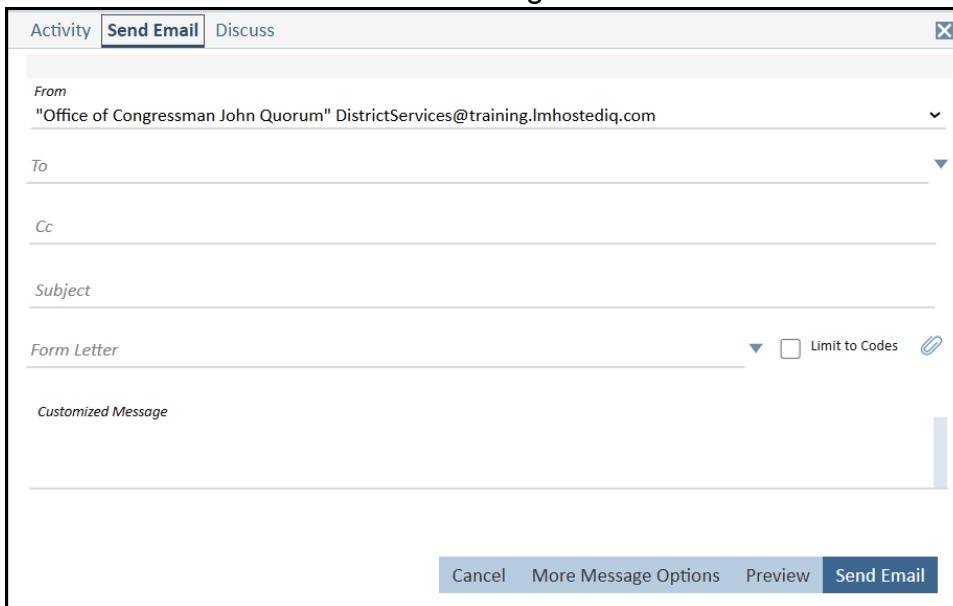
Sending a Message via a Service Record

Market: House, Senate

Description: Within the Services module, users can email and respond to the constituents via Form Letter or a customized response. These instructions teach users how to create and send these messages.

Sending a Quick Message

1. Click on **Send Email** next to **Activity** on the right-hand side of your Service.
2. Fill in the fields and choose a **Form Letter** or write a **Custom Message** in the space below.
 - a. ***Note:** The Template used when writing a Custom Message is determined by the **Default Quick Email Message Format User Setting**. To update this:
 - i. Click on your first initial in the top right hand corner → User Settings → Messages → Default Quick Email Message Format.
3. Click the Paper Clip icon to add an **Attachment**.
4. Choose **More Message Options** to see the full Message Sending screen.
5. Click **Preview** to send an email preview to yourself/others prior to sending.
6. Click **Send Email** to send the Message.



Sending a Message

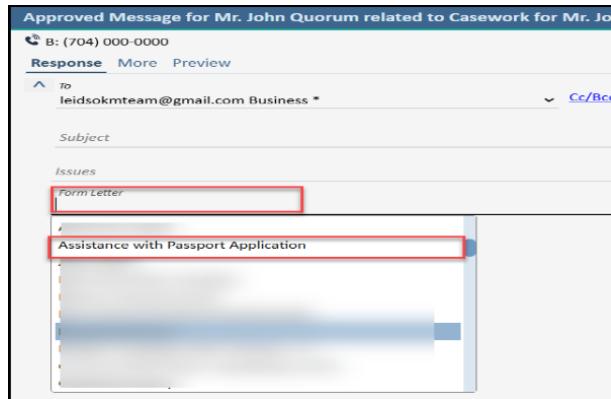
1. Open an active service record.
2. Select the envelope icon next to the Primary or Other Contacts.

Primary Contact <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Mr. John Quorum</div> <div style="display: flex; align-items: center; margin-top: 5px;"> Email </div>	Other Contacts + <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; background-color: #f0f0f0;"> </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Edit </div>
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3. Select the option to respond to the constituent.

a. Option - Form Letter

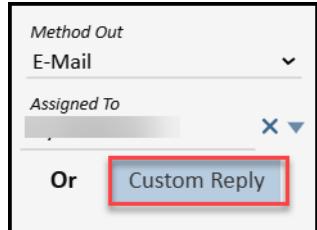
- i. Complete all necessary fields.
- ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.



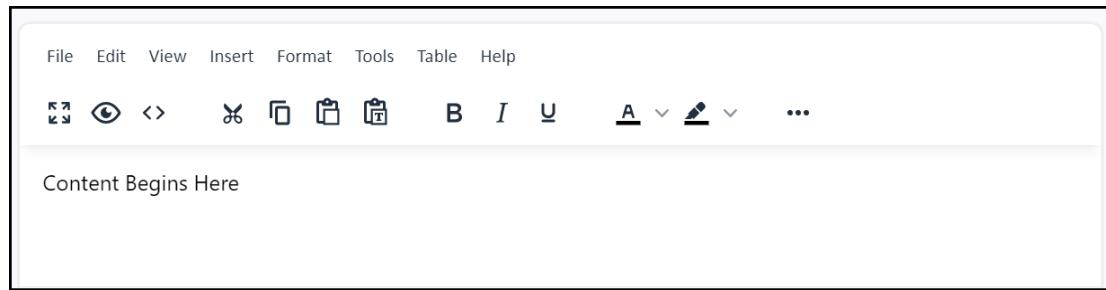
- iii. Select **Send**. (If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

b. Option - Custom Reply

- i. Click the **Custom Reply** button.



- ii. Use the content editor to type the custom reply. (To utilize the full screen option for the editor, click the ).



- iii. Select **Send**. (You may need approval for the custom reply. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

Sending a Follow Up Message

Once the Email has been sent out of the Service record, it will show in the Activity Stream. Next to the completed message is a button labeled **Follow Up**. The Follow Up action allows you to send a new email message to the recipient of your completed Message that includes your previously sent emails. To do this:

1. Navigate to your Service record and find your completed Message in the Activity Stream.
2. Click on **Follow Up**.
3. The **Send Email** tab will open with the **To** field and **Subject** already filled out.
4. Scroll down and type in your **Custom Message**.
 - a. Scroll down further to see the previously sent email.
5. Click **Send Email**.

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