

Creating a Form Letter

Market: House, Senate

1. Navigate to **Library** → **+New** → **Form Letter**.
2. Enter the name for your new **Form Letter**. Select the library directory location to store the **Form Letter**. The default template will display in the Format field, but you can change it. A preview of the selected format will display. The email version is on the left and the printed version is on the right. Select **Create**.

Add Form Letter

Add Form Letter

Name

September Test Letter

Type


Form Letter

Directory

Form Letters

Format

Default Template - 12pt 1in



Congress of the United States
House of Representatives
Washington, DC

MAIL.DATE_ON_LETTER_FOR_

Dear newsletter.salutation_for_merging.merge,

Content Begins Here

Mail.date_on_letter_for_printing.merge

Mail.name_based_on_salutation.merge

Mail.address.title.merge

Mail.address.org1.merge

Mail.address.org2.merge

Mail.address.addr1.merge

Mail.address.addr2.merge

Mail.address.addr3.merge

Mail.address.addr4.merge

Mail.address.csz9.merge

Mail.address.country_translation_except_USA.merge

Create

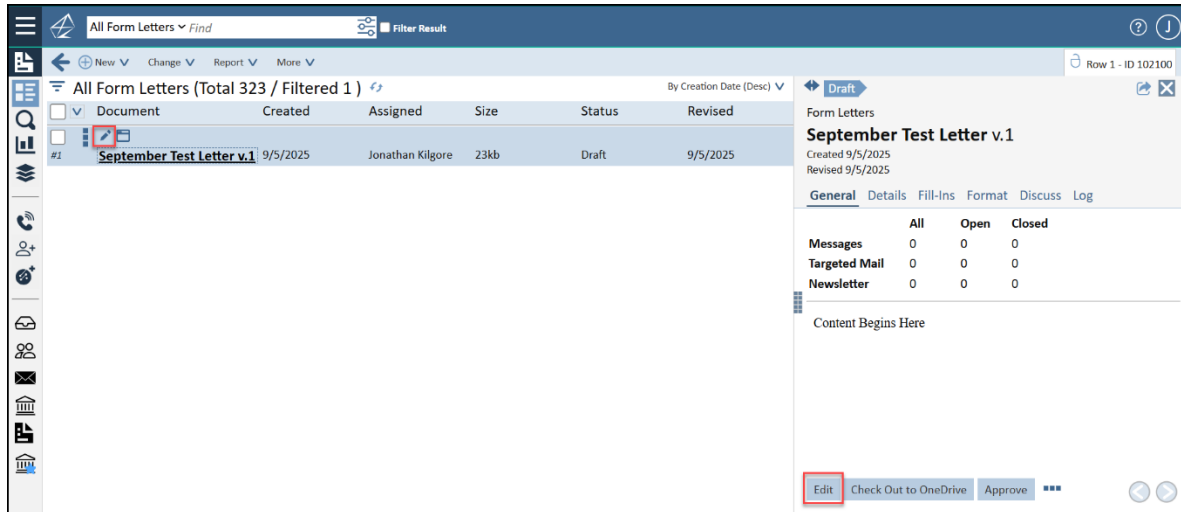
Close

Page 1 of 5

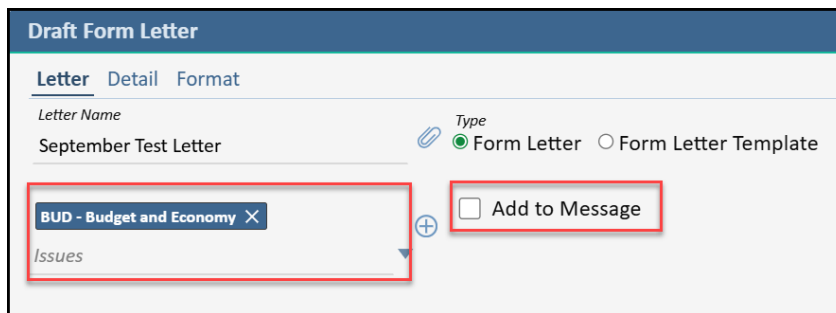
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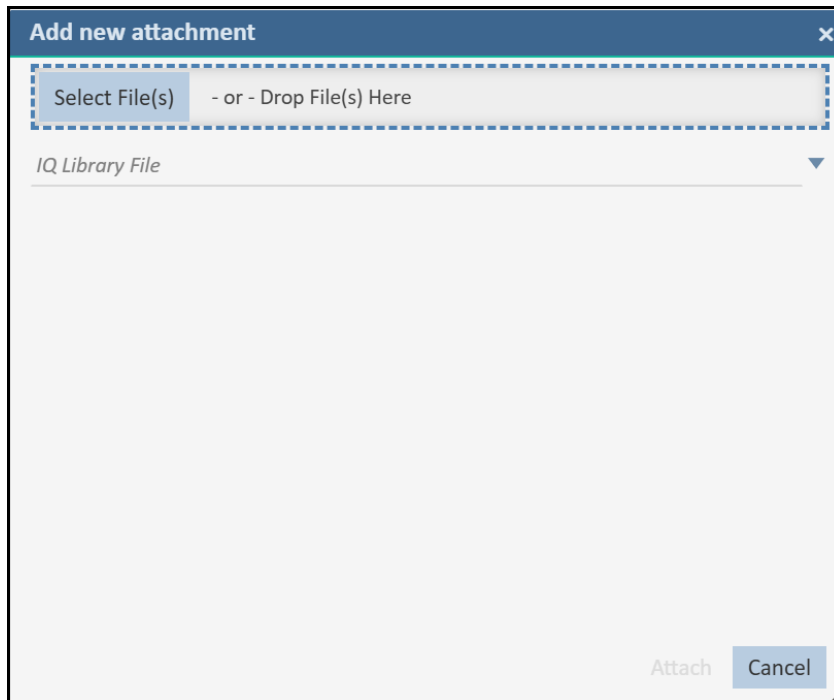
3. The Draft **Form Letter** view will open. Click the **Edit** button.
 - a. **Note*:** The **Check Out to OneDrive** is only available for offices that have connected their Office 365 account with IQ. Talk to your IQ Consultant for more information.




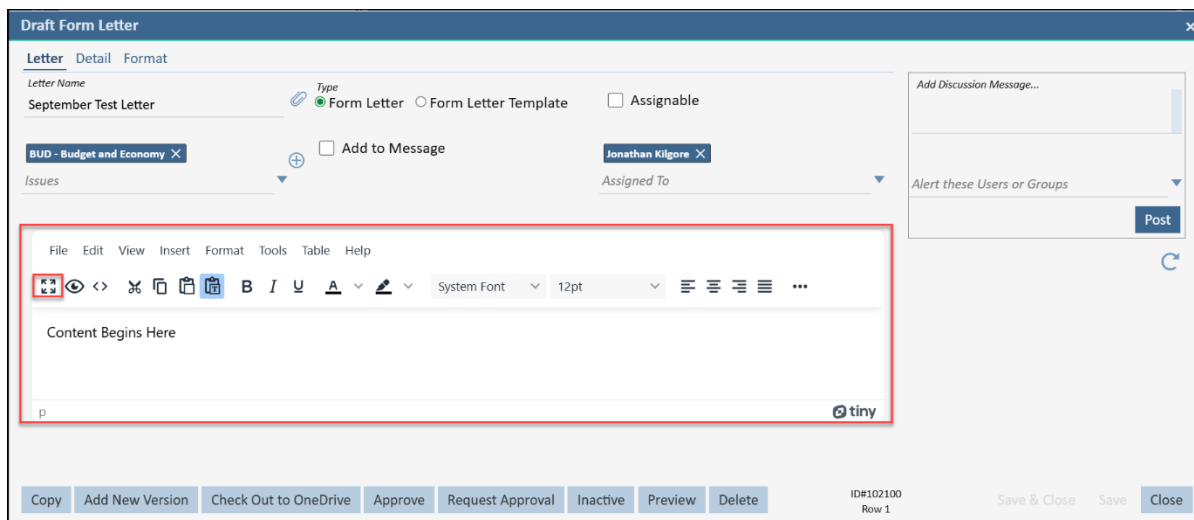
4. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.
5. Select **Add to Message**. This will ensure that all correspondences that will use this Form Letter will include the issue code(s) you selected.



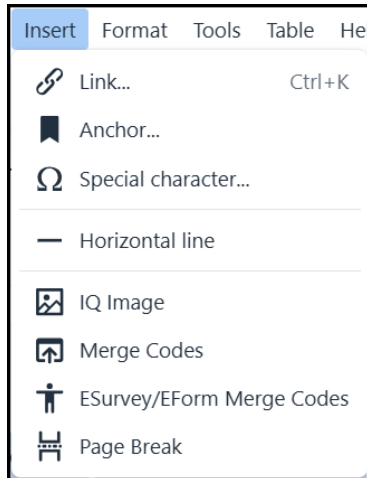
6. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach**.



7. Compose the content of the form letter in the editor window. You can make it full screen by clicking .



8. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, etc.



9. Click **Save**.

10. Click **Request Approval**. Then select your Form Letter Approver and click **Update**. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages while awaiting approval. Once the **Form Letter** is approved, you will be able to send the message with the approved **Form Letter**.

11. Click **Save**.

12. Click **Preview** to send an email preview or print a preview of the Form Letter.

13. Click the **Detail** panel to add additional information, including **Review Date**, **Email Subject/Address**, and **Affiliation Codes** on **Hyperlinks** in the Form Letter.

Draft Form Letter

Letter **Detail** Format

Review Date

mm/dd/yyyy

Expiration Date

mm/dd/yyyy

Directory

Form Letters

Description

Duplicate Letters

Library Codes

Service Codes

Service Categories

Report Duplicates

Yes

Envelope

No envelope selected

Email Subject

☐ Always Use

Email Address

Bills

☐ Supports
 ☐ Opposes
 ☒ No Position

Email Format

100090 - Default Template - 12pt 1in

Print Format

100090 - Default Template - 12pt 1in

Add Discussion Message...

Alert these Users or Groups

Post

Copy

Add New Version

Check Out to OneDrive

Approve

Request Approval

Inactive

Preview

Delete

ID#102100

Row 1

Save & Close

Save

Close

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