

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

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 enewsletter.salutation_for_merging.merge,

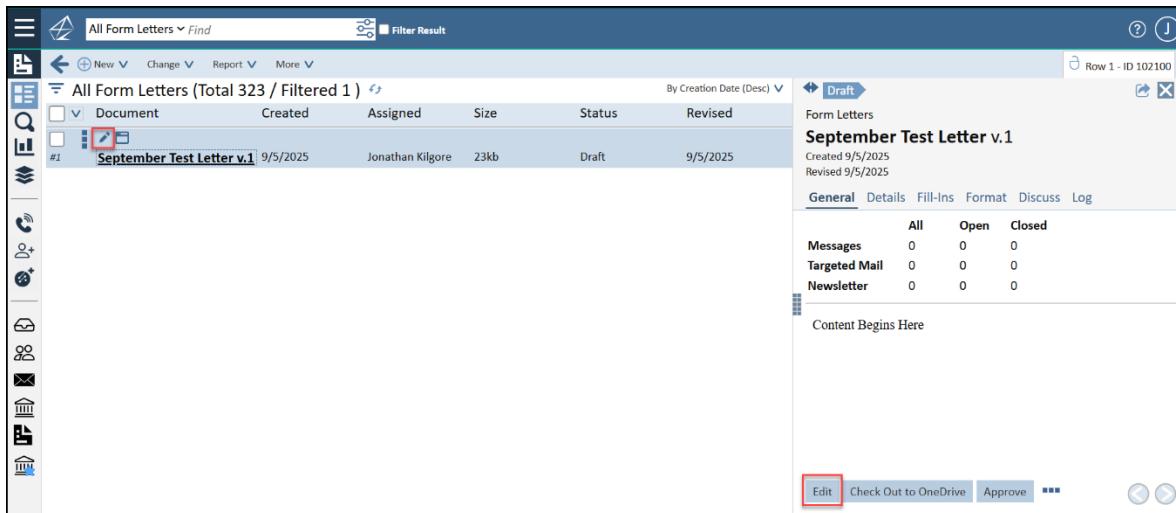
Content Begins Here

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.csv9.merge
Mail.address.country_translation_except_TSIA.merge

Create **Close**

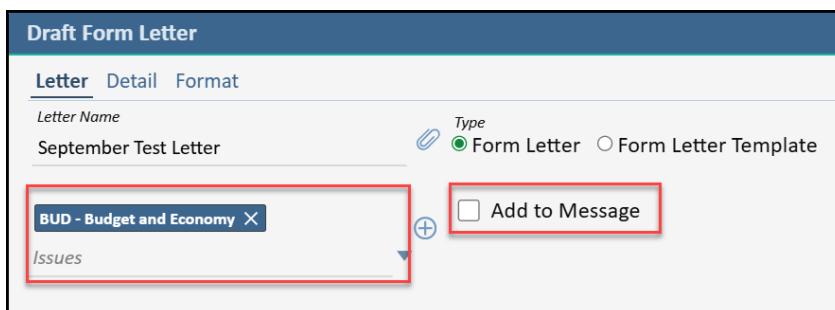
3. The Draft Form Letter view will open. Click the **Edit button.**

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.

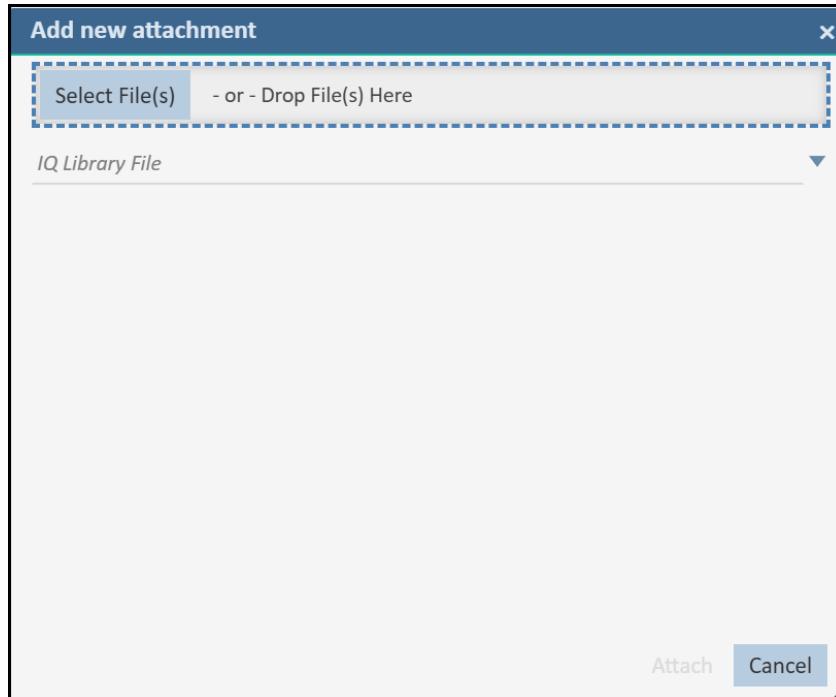


4. Complete the information in the **Draft Form Letter window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.**

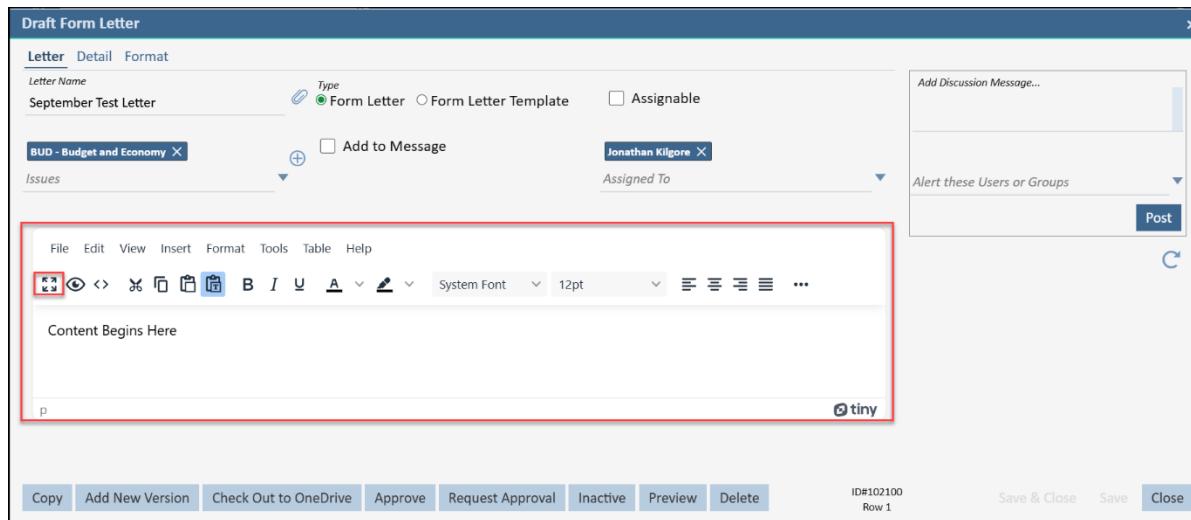
5. Select **Add to Message. This will ensure that all correspondences that will use this Form Letter will include the issue code(s) you selected.**



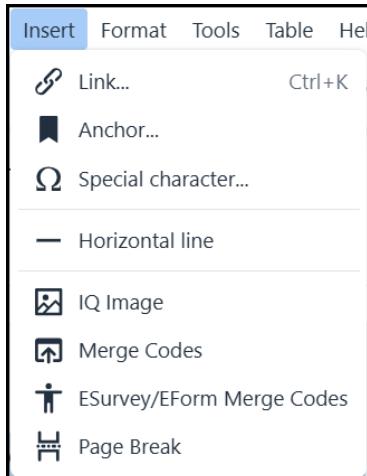
6. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach.**



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

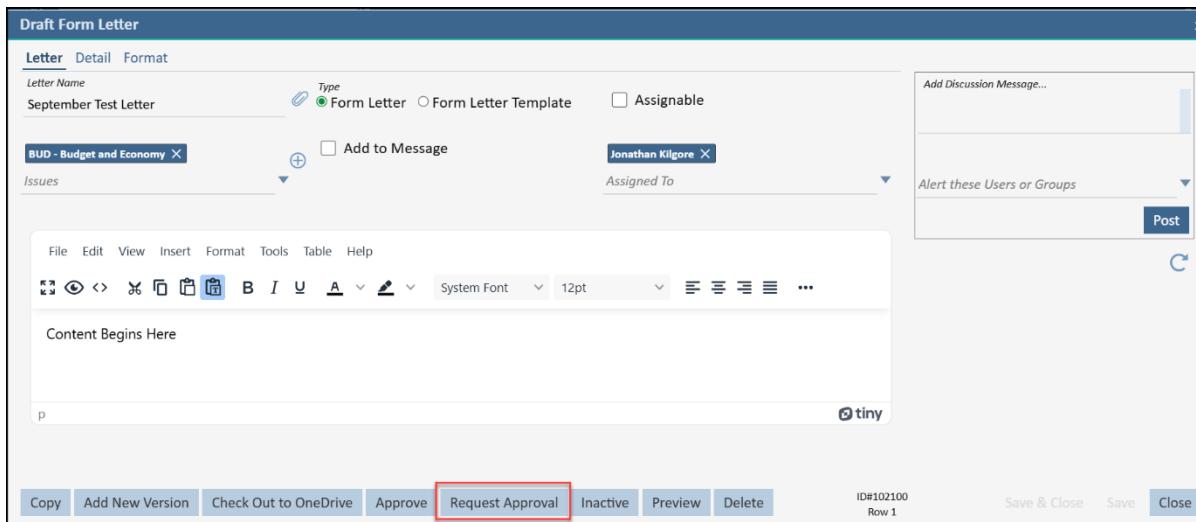


8. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, etc.



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  Expiration Date  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  

Actions: [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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