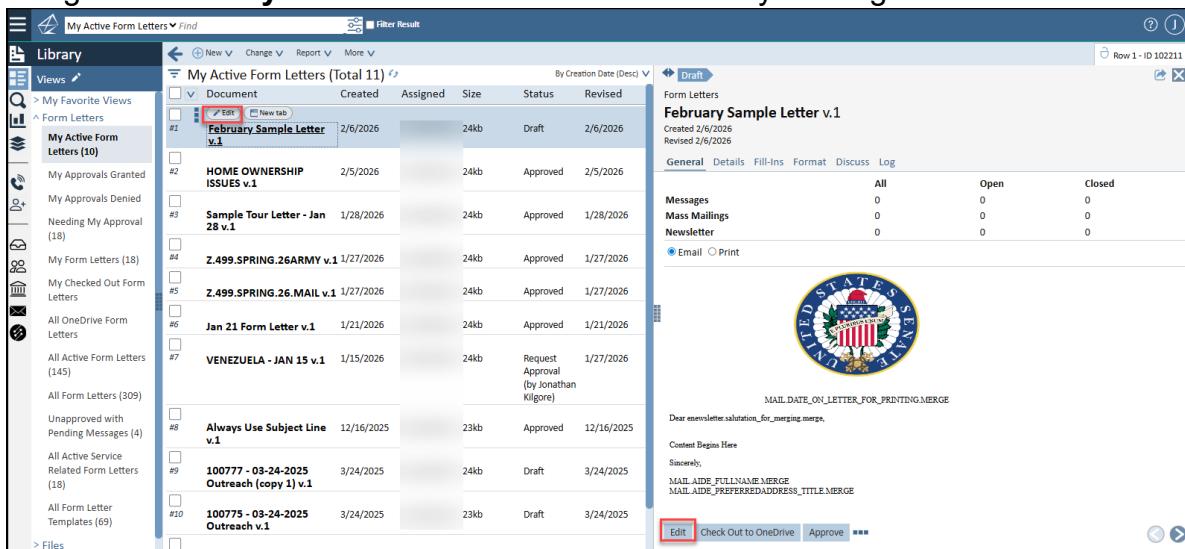


## Editing a Form Letter Template

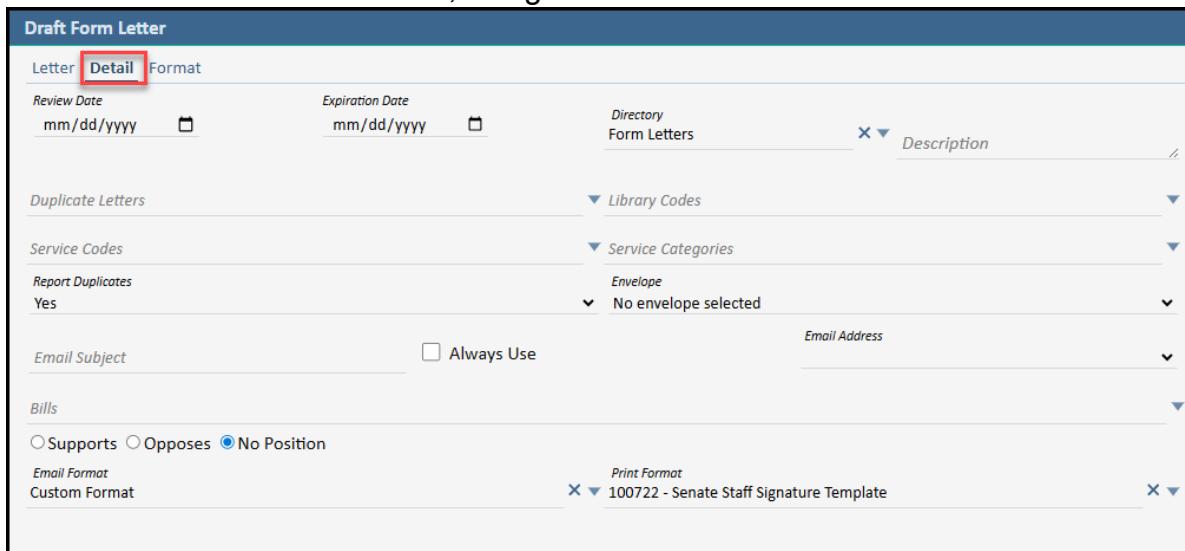
**Market:** House, Senate

### 1. Navigate to Library and select a Form Letter to edit by clicking the Edit button.



The screenshot shows a list of 11 form letters. The first item, 'February.Sample.Letter v.1', has its 'Edit' button highlighted with a red box. The right side of the screen shows a detailed view of this specific letter, including its creation date (2/6/2026), status (Draft), and a preview of the content. The preview includes the U.S. Senate seal and a snippet of the letter's text: 'MAIL\_DATE\_ON LETTER FOR PRINTING MERGE' and 'Dear newsletter\_salutation\_for\_merging\_merge, Content Begins Here'. At the bottom of the preview window, the 'Edit' button is also highlighted with a red box.

### 2. In the Draft Form Letter window, navigate to the Detail tab.



The screenshot shows the 'Draft Form Letter' configuration window. The 'Detail' tab is selected and highlighted with a red box. The window includes fields for 'Review Date' (mm/dd/yyyy), 'Expiration Date' (mm/dd/yyyy), 'Service Codes', 'Report Duplicates' (set to 'Yes'), 'Email Subject', 'Bills' (radio buttons for 'Supports', 'Opposes', and 'No Position'), 'Email Format' (radio buttons for 'Custom Format'), and a 'Print Format' section showing '100722 - Senate Staff Signature Template'. On the right side, there are dropdown menus for 'Library Codes', 'Service Categories', and 'Envelope' (set to 'No envelope selected').

3. In the Detail tab, clear the fields in the **Email Format** and **Print Format** by clicking the X to delete the existing information.

**Draft Form Letter**

**Letter** **Detail** **Format**

Review Date mm/dd/yyyy	Expiration Date mm/dd/yyyy	Directory Form Letters	Description
		<span>Add Discussion Message...</span> <span>Alert these Users or Groups</span>	
<span>Duplicate Letters</span>		<span>Library Codes</span>	
<span>Service Codes</span>		<span>Service Categories</span>	
<span>Report Duplicates</span> Yes		<span>Envelope</span> <span>No envelope selected</span>	
<span>Email Subject</span>		<span>Always Use</span>	
		<span>Email Address</span>	
<span>Bills</span>			
<input type="radio"/> Supports <input type="radio"/> Opposes <input checked="" type="radio"/> No Position			
<span>Email Format</span>		<span>Print Format</span>	

**Copy** **Add New Version** **Check Out to OneDrive** **Approve** **Request Approval** **Inactive** **Preview** **Delete**

ID#102211  
Row 1

**Save & Close** **Save** **Close**

#### 4. Click to the **Format** tab.

**Draft Form Letter**

**Letter** **Detail** **Format** Format

Review Date mm/dd/yyyy	Expiration Date mm/dd/yyyy	Directory Form Letters	Description
		<span style="border: 1px solid #ccc; padding: 2px;">Add Discussion Message...</span> <span style="border: 1px solid #ccc; padding: 2px;">Alert these Users or Groups</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Duplicate Letters</span>		<span style="border: 1px solid #ccc; padding: 2px;">Library Codes</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Service Codes</span>		<span style="border: 1px solid #ccc; padding: 2px;">Service Categories</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Report Duplicates</span> Yes		<span style="border: 1px solid #ccc; padding: 2px;">Envelope</span> <span style="border: 1px solid #ccc; padding: 2px;">No envelope selected</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Email Subject</span>		<span style="border: 1px solid #ccc; padding: 2px;">Email Address</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Bills</span>			
<input type="radio"/> Supports <input type="radio"/> Opposes <input checked="" type="radio"/> No Position			
<span style="border: 1px solid #ccc; padding: 2px;">Email Format</span>		<span style="border: 1px solid #ccc; padding: 2px;">Print Format</span>	
<span style="border: 1px solid #ccc; padding: 2px;">Copy</span> <span style="border: 1px solid #ccc; padding: 2px;">Add New Version</span> <span style="border: 1px solid #ccc; padding: 2px;">Check Out to OneDrive</span> <span style="border: 1px solid #ccc; padding: 2px;">Approve</span> <span style="border: 1px solid #ccc; padding: 2px;">Request Approval</span> <span style="border: 1px solid #ccc; padding: 2px;">Inactive</span> <span style="border: 1px solid #ccc; padding: 2px;">Preview</span> <span style="border: 1px solid #ccc; padding: 2px;">Delete</span>			
		<span style="border: 1px solid #ccc; padding: 2px;">ID#102211</span> <span style="border: 1px solid #ccc; padding: 2px;">Row 1</span>	
		<span style="border: 1px solid #ccc; padding: 2px;">Save &amp; Close</span> <span style="border: 1px solid #ccc; padding: 2px;">Save</span> <span style="border: 1px solid #ccc; padding: 2px;">Close</span>	

5. Select either the **Email** or **Print** format to edit and then click the corresponding button. If you choose to edit the Email format, the button will display **Edit Email Format**. If you choose to edit the Print format, you will click the **Check Out** button. You will either check out/check in to One Drive or use IQ Edit.

Draft Form Letter

Letter Detail Format

Email  Print

[Edit Email Format](#)

Draft Form Letter

Letter Detail Format

Email  Print

[Check Out](#)

6. Make your edits to the template and click the appropriate Save button.