

Editing a Form Letter Template

Market: House, Senate

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

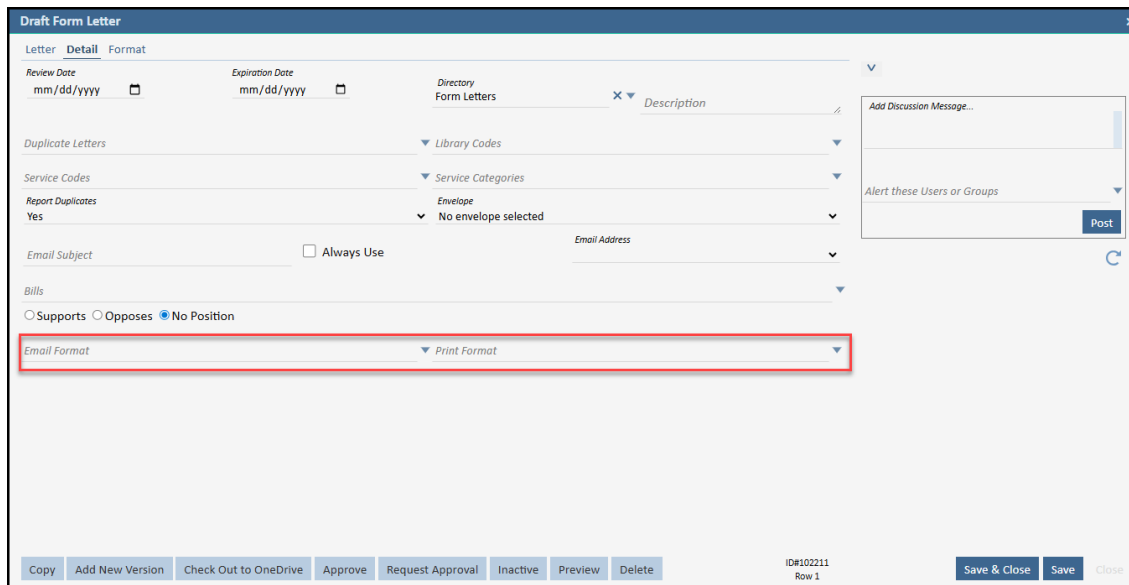
The screenshot shows the 'My Active Form Letters' library. The left sidebar contains a 'Library' section with various filters. The main table lists 11 form letters. The 'February Sample Letter v.1' is highlighted, and its 'Edit' button is circled in red. The right pane shows the details for this letter, including a preview of the letter content and a table of messages.

Document	Created	Assigned	Size	Status	Revised
#1 February Sample Letter v.1	2/6/2026		24kb	Draft	2/6/2026
#2 HOME OWNERSHIP ISSUES v.1	2/5/2026		24kb	Approved	2/5/2026
#3 Sample Tour Letter - Jan 28 v.1	1/28/2026		24kb	Approved	1/28/2026
#4 Z.499.SPRING.26ARMY v.1	1/27/2026		24kb	Approved	1/27/2026
#5 Z.499.SPRING.26.MAIL v.1	1/27/2026		24kb	Approved	1/27/2026
#6 Jan 21 Form Letter v.1	1/21/2026		24kb	Approved	1/21/2026
#7 VENEZUELA - JAN 15 v.1	1/15/2026		24kb	Request Approval (by Jonathan Kilgore)	1/27/2026
#8 Always Use Subject Line v.1	12/16/2025		23kb	Approved	12/16/2025
#9 100777 - 03-24-2025 Outreach (copy 1) v.1	3/24/2025		24kb	Draft	3/24/2025
#10 100775 - 03-24-2025 Outreach v.1	3/24/2025		23kb	Draft	3/24/2025

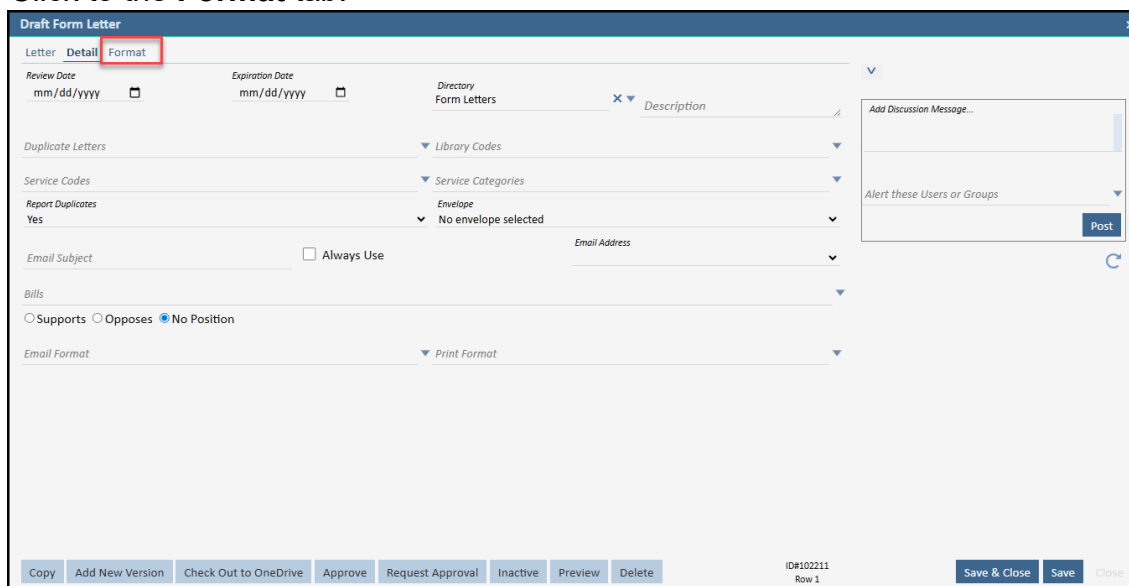
2. In the Draft Form Letter window, navigate to the **Detail** tab.

The screenshot shows the 'Draft Form Letter' window. The 'Detail' tab is selected and highlighted with a red box. The window contains various fields for editing the letter, including 'Review Date', 'Expiration Date', 'Directory', 'Description', 'Duplicate Letters', 'Service Codes', 'Report Duplicates', 'Email Subject', 'Bills', 'Email Format', and 'Print Format'.

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



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



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.