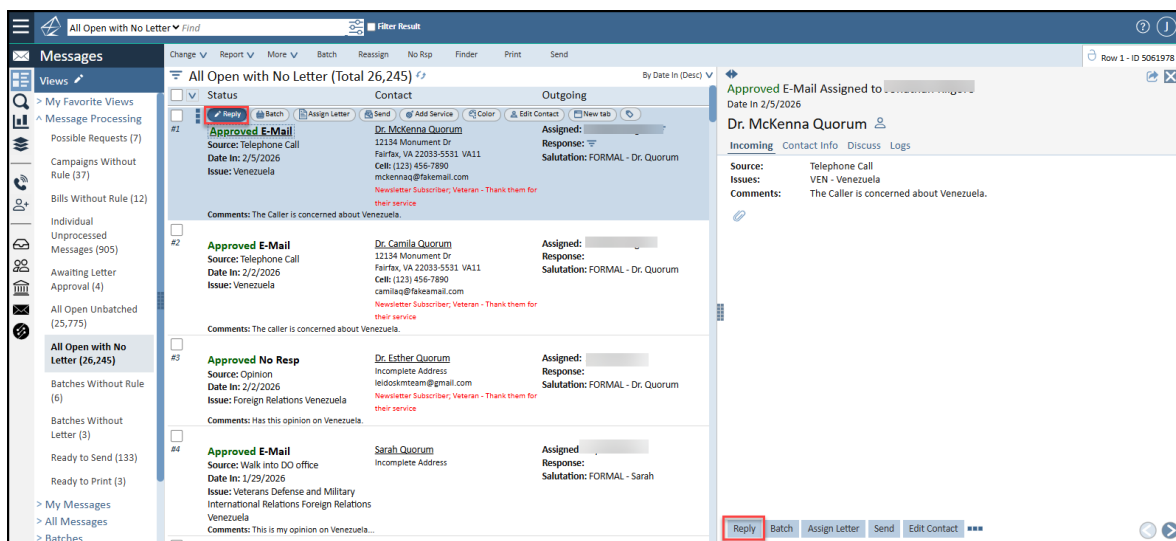


Creating a New Form Letter from a Custom Reply

Market: House, Senate

Description: When typing a Custom Reply to a Constituent, you may wish to save that reply as a new Form Letter for future re-use. This guide walks through the process of accomplishing this.

1. Click on **Reply** for the Open Message you are typing your Custom Response to.



2. Click on **Custom Reply** and type out your response.

The screenshot shows a web interface for managing messages. At the top, it says "Approved Message for Dr. McKenna Quorum". Below this, there's a header with "C: (123) 456-7890" and tabs for "Response", "More", and "Preview". The main area displays a message from "mckennaq@fakemail.com" to "Office of Congressman John Quorum". There are fields for "Subject", "Method Out" (set to "E-Mail"), and "Assigned To". A "Form Letter" button is highlighted with a red box. To the right, there's a "Comments" section with the text "The Caller is concerned about Venezuela." and a "Post" button. At the bottom, there's a toolbar with buttons like "Deny", "On Hold", "Batch", "Color", "Swap Contact", "Edit Contact", "Outgoing Copy", "Schedule Send", and "Send".

3. Type out a name for your new Form Letter under **Letter Name**, then click on **Save as New Form Letter**.

The screenshot shows the "On Hold Message for Dr. McKenna Quorum" interface. It has a similar layout to the previous one, but with a "Letter Name" field highlighted by a red box, containing the text "New Custom Form Letter". Below this is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table, Help) and a toolbar with various formatting options. The text "This is my custom response I want to save as a new form letter" is entered in the editor. At the bottom, the "Save as New Form Letter" button is highlighted with a red box. The toolbar also includes "Approve", "Request Approval", "Deny", "Batch", "Preview", "Color", "Swap Contact", "Edit Contact", "Outgoing Copy", and "Save & Close".

4. A confirmation page will appear. Click **Continue**.

Save as New Form Letter

New Form Letter Name

New Custom Form Letter

Convert this custom letter into a new form letter and assign that form letter to this message record.

Continue

Cancel

5. Your New Custom Letter has now been saved as a new Draft Form Letter. Note that this letter will have to be approved in order to be sent.

On Hold Message for Dr. McKenna Quorum

C: (123) 456-7890

Response

More

Preview

To

mckennaq@fakemail.com *

From

Cc/Bcc "Office of Congressman John Quorum"<DistrictServices@training.lmhosted>

Method Out

E-Mail

Subject

VEN - Venezuela

Assigned To

Issues

Form Letter

View Custom Form Letter (D)

Limit to Codes

Customize Letter

February 6, 2026

Dear Dr. Quorum,

Approve

Request Approval

Deny

Batch

Preview

Color

Swap Contact

Edit Contact

Outgoing Copy

ID#5061978

Row 1

Save & Close

Save

Close

Comments

The Caller is concerned about Venezuela.

Add Discussion Message...

Alert these Users or Groups

Post

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