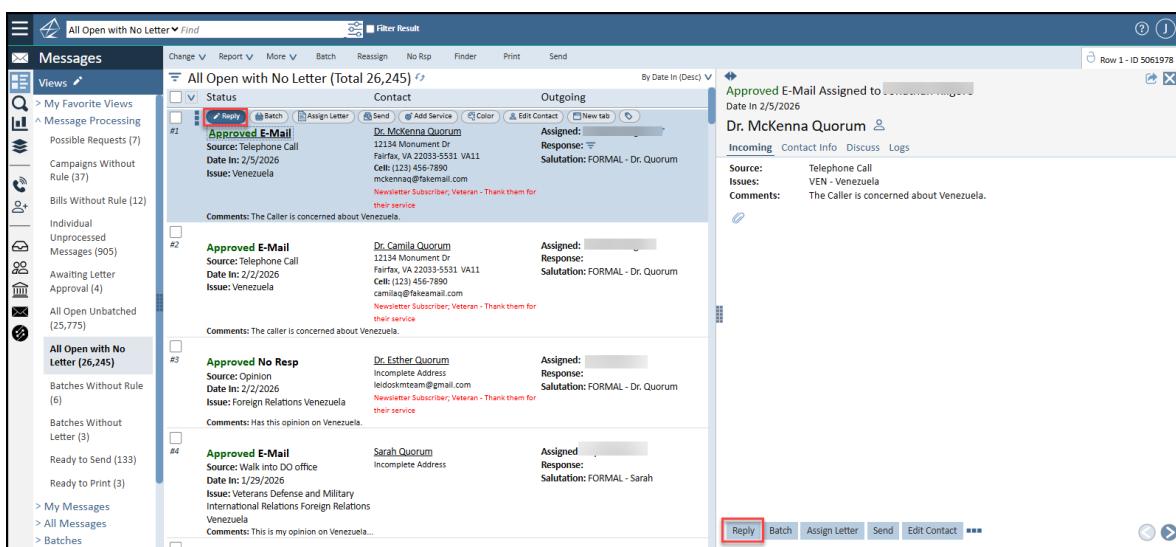


Creating a New Form Letter from a Custom Reply

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.

Approved Message for Dr. McKenna Quorum

C: (123) 456-7890

Response More Preview

To: mckennaq@fakemail.com * From: "Office of Congressman John Quorum"<DistrictServices@training.lmhostediq.v

Subject:

Issues: **VEN - Venezuela**

Form Letter

Assigned To: Or

Comments: The Caller is concerned about Venezuela.

Add Discussion Message...

Alert these Users or Groups

Method Out: E-Mail

Deny On Hold Batch Color Swap Contact Edit Contact Outgoing Copy Schedule Send Send ID#5061978 Row 1

Save & Close Save Close

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

On Hold Message for Dr. McKenna Quorum

C: (123) 456-7890

Response More Preview

To: mckennaq@fakemail.com * From: "Office of Congressman John Quorum"<DistrictServices@training.lmhostediq.v

Subject:

Issues: **VEN - Venezuela**

Letter Name: **New Custom Form Letter**

This is my custom response I want to save as a new form letter:

Save as New Form Letter

Approve Request Approval Deny Batch Preview Color Swap Contact Edit Contact Save as New Form Letter Outgoing Copy ID#5061978 Row 1

Save & Close 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: "Office of Congressman John Quorum"<DistrictServices@training.lmhosteddc.com>

Subject: **VEN - Venezuela**

Issues: Form Letter **New Custom Form Letter (D)**

Comments: The Caller is concerned about Venezuela.

Assigned To: **Method Out** E-Mail

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

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