



Batching & Letters in IQ5



▶ **Audience:**
All IQ Users

▶ **Method of Training:**
WebEx/remote

▶ **Market:** House,
Senate

SUMMARY

This training focuses on activities and features associated with the *Messages* module of IQ.

BY THE END OF THIS COURSE, YOU WILL BE ABLE TO

- ▶ Utilize the My Open & Unbatched Messages View to Batch assigned Messages
- ▶ Utilize the Campaign finder to automatically group similar emails together
- ▶ Use Filters and Key Word Searches to find themes amongst assigned Messages
- ▶ Create Batch Response Rules to streamline and automate the response process
- ▶ Create a new Form Letter in IQ for use in responding to constituents
- ▶ Utilize the Form Letter editor to edit text, add images, insert previous Form Letter text, and insert merge codes
- ▶ Attach Form Letters to a Batch to respond to many constituents at once
- ▶ Find Form Letters in the Library to archive old ones and update (create new versions) of existing ones to keep your Letters up to date