

# Batching Messages in IQ5

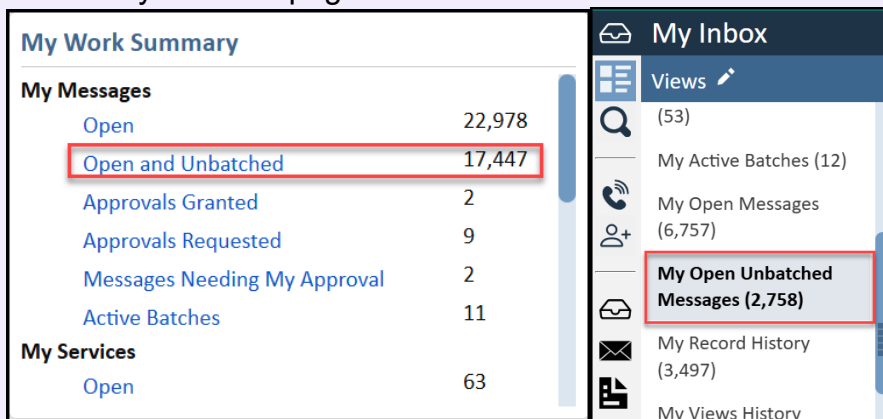
**Market:** Federal/State/Local, House, Senate

**Description:** Mail that comes into IQ that is not sorted as a **Bill Related Message** or a **Campaign Message** is considered an **Individual Message**. These individual messages can either be placed into **Batches** or can be responded to one at a time. To optimize the correspondence for these individual messages, the best practice is to **Batch** individual messages that have common attributes (i.e., issues) and reply to all using a **Form Letter**.

These instructions teach users how to find and Batch Individual Messages assigned to a user in IQ. For instructions on how to send responses to messages, see the **Replying to Emails or Printing Letters** guides.

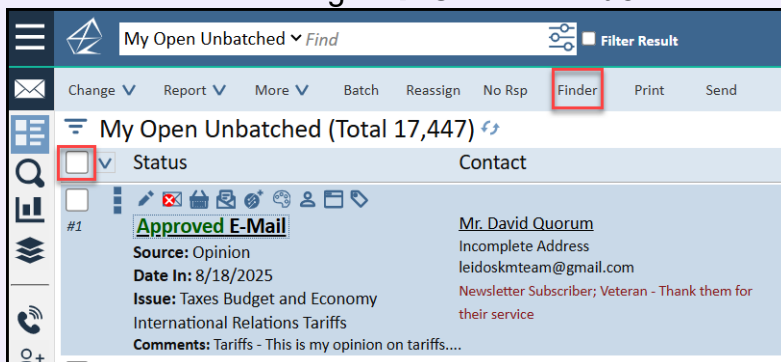
## Batching with the Finder Tool

1. Using the **My Work Summary** tile on the Homepage or the **My Inbox** application, click on **My Open Unbatched Messages**.
  - a. **\*Note:** If you do not have the My Work Summary tile, scroll to the bottom of your homepage and click on the **Add Tile** button to find/add it.



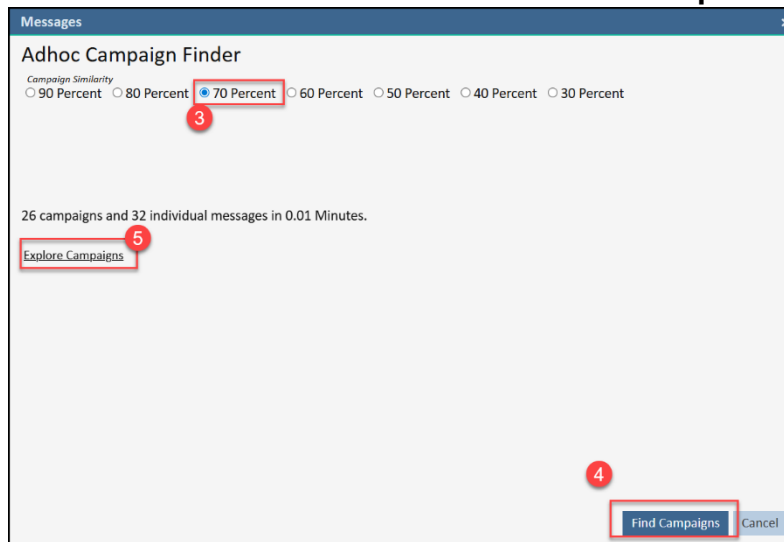
The screenshot shows two side-by-side panels. The left panel, titled 'My Work Summary', contains a list of categories and counts: 'My Messages' (Open: 22,978; Open and Unbatched: 17,447; Approvals Granted: 2; Approvals Requested: 9; Messages Needing My Approval: 2; Active Batches: 11) and 'My Services' (Open: 63). The 'Open and Unbatched' item is highlighted with a red rectangle. The right panel, titled 'My Inbox', shows a list of views: '(53)', 'My Active Batches (12)', 'My Open Messages (6,757)', 'My Open Unbatched Messages (2,758)', 'My Record History (3,497)', and 'My Views History'. The 'My Open Unbatched Messages (2,758)' item is highlighted with a red rectangle.

2. Select all of the Messages → Click on **Finder**.

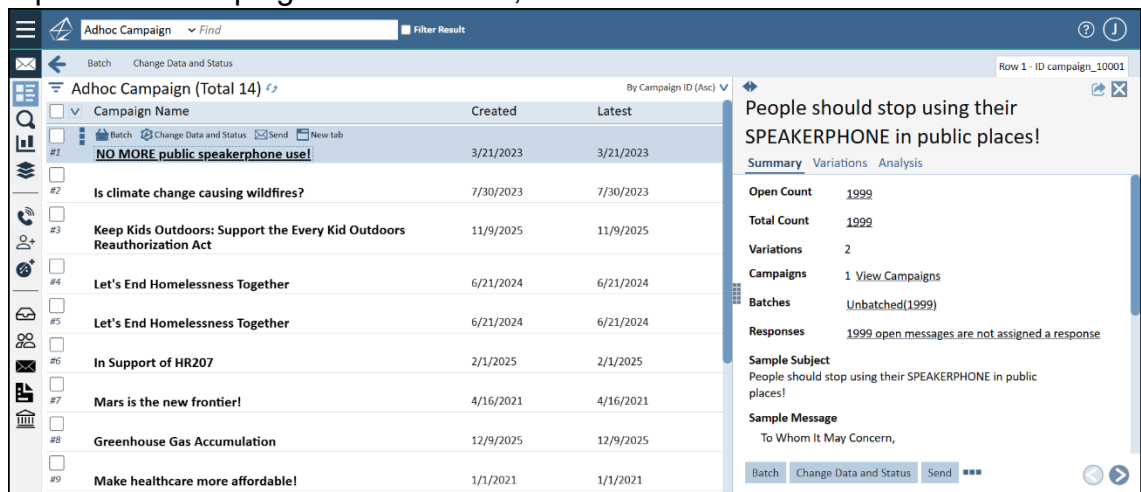


The screenshot shows the 'Finder' tool interface. At the top, there's a search bar with 'My Open Unbatched' and a 'Find' button. Below the search bar, there's a toolbar with buttons: 'Change', 'Report', 'More', 'Batch', 'Reassign', 'No Rsp', 'Finder', 'Print', and 'Send'. The 'Finder' button is highlighted with a red rectangle. Below the toolbar, there's a section titled 'My Open Unbatched (Total 17,447)'. Under this section, there's a table with columns 'Status' and 'Contact'. The first row shows a message with the following details: 'Approved E-Mail', 'Source: Opinion', 'Date In: 8/18/2025', 'Issue: Taxes Budget and Economy International Relations Tariffs', 'Comments: Tariffs - This is my opinion on tariffs....', and 'Mr. David Quorum' (Incomplete Address, leidoskteam@gmail.com, Newsletter Subscriber; Veteran - Thank them for their service).

3. Choose a percent similarity for IQ to search for amongst all of the selected emails.
4. Click on **Find Campaigns**.
5. IQ has now looked through all the emails in the selected list and found potential “campaigns” that can be batched, as well as separated out the individual emails that did not meet the chosen criteria. Click on **Explore Campaigns**.



6. Click on a found campaign and read the sample Subject and Message. Once the topic of the campaign is understood, click on **Batch**.



7. Click into the **All Batches** dropdown to select an existing batch. If no Batch exists, click on the  icon to create a new Batch.

**Campaign Message Batch Update**

Batches

☒ All Active Unlocked ☐ Remove Current

All Batches

Recently Used Batches

- TARIFFS- AUG 20 (19) - has rule
- EQUITABLE EDUCATION BATCH JUNE 10 (2000) - has rule
- EDUCATION BATCH (25) -

Issues

Update Cancel

8. Review or Create the **Batch Rules**. These will determine what settings are applied to messages that go into the Batch, such as the **Issue Codes**, the **Staffer Assigned** the Messages, and what **Form Letter** response will be assigned.

9. Click **Update**.

**Campaign Message Batch Update**

Batches

☒ All Active Unlocked ☐ Remove Current

All Batches

CLIMATE CHANGE (1) - has rule

Response Rules

Issues: Environmental

Assigned To: [Staffer]

Letter Name: CLIMATE CHANGE

Autosend Rules

Issues

Update Cancel

## Batching with Filters & Key Words

1. Using the **My Work Summary** tile on the Homepage or the **My Inbox** application, click on **My Open Unbatched Messages**.

### My Work Summary

#### My Messages

|                              |        |
|------------------------------|--------|
| Open                         | 22,978 |
| Open and Unbatched           | 17,447 |
| Approvals Granted            | 2      |
| Approvals Requested          | 9      |
| Messages Needing My Approval | 2      |
| Active Batches               | 11     |

#### My Services

|      |    |
|------|----|
| Open | 63 |
|------|----|

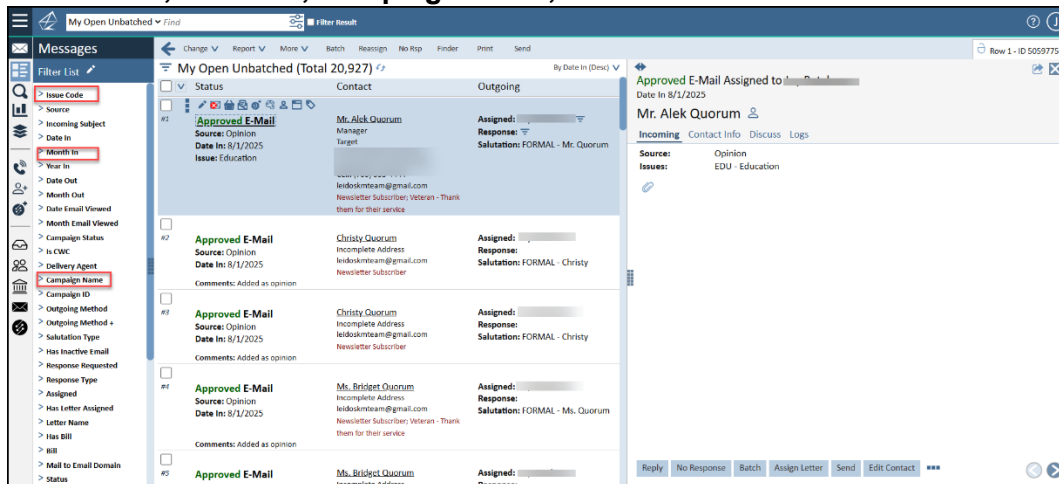
### My Inbox

#### Views

(53)

- My Active Batches (12)
- My Open Messages (6,757)
- My Open Unbatched Messages (2,758)
- My Record History (3,497)
- My Views History

- Click on the  icon to open the **Filters**.
- Click on **Filters** that will help identify Messages that are similar to each other, such as **Issue Code**, **Month In**, **Campaign Name**, etc.



- Review the Messages in the list and either:
  - Select all of the Messages → Click on **Batch** → follow steps 6-8 above.
  - Select only certain messages that match → Click on **Batch** → follow steps 6-8 above.
- Use the **Search Bar** at the top of the page to type in Key Words that can also help to find similar Messages.
  - Utilize the  icon for more advanced options.

The screenshot shows the Microsoft Dynamics 365 Messages interface. The top toolbar includes buttons for 'Change', 'Report', 'More', 'Batch' (highlighted with a red box), 'Reassign', 'No Resp', 'Finder', 'Print', and 'Send'. The main header indicates 'My Open Unbatched (Total 20,927 / 1,999 of 1,999 Selected)'. The left sidebar shows a 'Filter List' with 'ENV-Environmental' selected. The main pane displays a list of messages, all marked as 'Approved E-Mail'. The first message is selected, and its details are shown on the right.

| Message ID | Status          | Source | Date In   | Issue         | Subject                              | Assigned To | Response   | Salutation         |
|------------|-----------------|--------|-----------|---------------|--------------------------------------|-------------|------------|--------------------|
| #1         | Approved E-Mail | E-Mail | 8/23/2023 | Environmental | Is climate change causing wildfires? | [Redacted]  | [Redacted] | FORMAL - Paul      |
| #2         | Approved E-Mail | E-Mail | 8/23/2023 | Environmental | Is climate change causing wildfires? | [Redacted]  | [Redacted] | FORMAL - Fernando  |
| #3         | Approved E-Mail | E-Mail | 8/23/2023 | Environmental | Is climate change causing wildfires? | [Redacted]  | [Redacted] | FORMAL - Catherine |
| #4         | Approved E-Mail | E-Mail | 8/23/2023 | Environmental | Is climate change causing wildfires? | [Redacted]  | [Redacted] | FORMAL - Magda     |