

Message Processing in IQ5

Market: House, Senate

Description: These instructions teach users how to use the **Message Processing View** to sort, reassign, and batch incoming mail from constituents across campaigns, bills, and individual messages.

Message Processing View

The Message Processing View is designed to allow for a mail manager to review all the incoming mail for an office, assign them all to batches, and assign Batch response rules to them. Once messages or campaigns have been assigned to a Batch, and that Batch has a response rule, they are considered Processed. These rules will automate the office's response by assigning letters, issue codes, etc. automatically and then sending those letters as a response to the constituents automatically on days and a time of the office's choice. Below are guides to each View within Message Processing.

Use the following links to jump to the corresponding topic:

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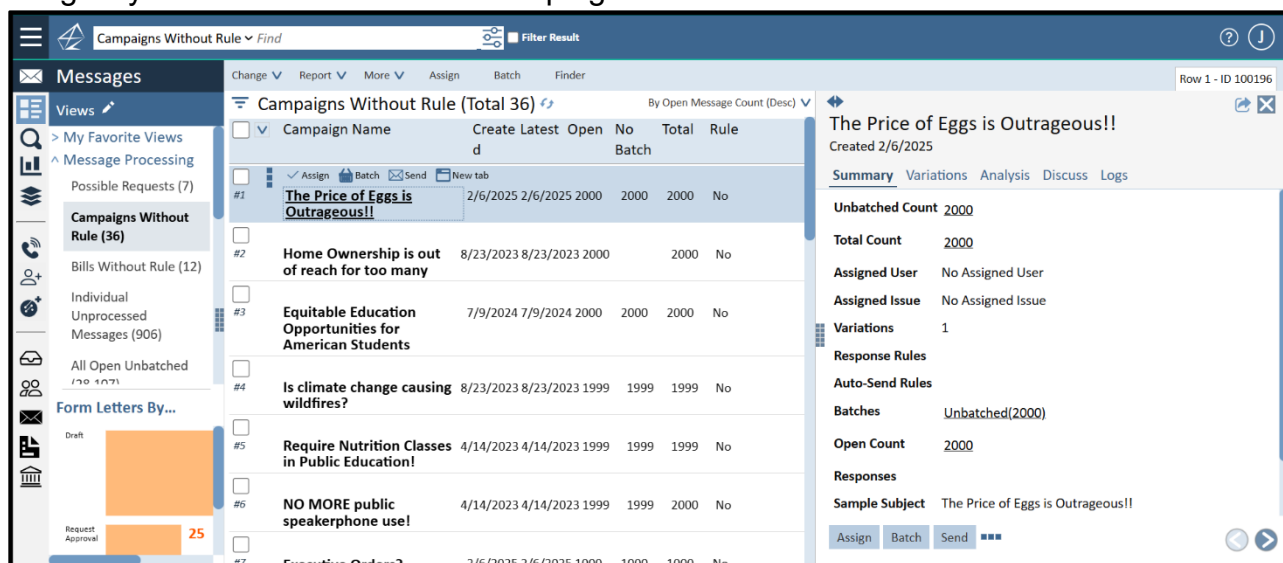
Possible Requests

1. Navigate to the **Messages** application.

2. Click on the **Message Processing View**, then **Possible Requests**. These are incoming emails identified by IQ for further review as they may be asking for a Service such as Casework. ***Note:** Your IQ Consultant must set up these background rules for messages to be identified as possible requests.
3. Review these messages and choose to do any of the following:
 - a. **Reply:** You can reply by clicking the **Pencil** icon or double clicking on the incoming email and typing out a custom reply or choosing a letter. Then click **Send**.
 - b. **Complete with No Response:** If the message requires no response or service, click on the check box next to it and select the **No Rsp** button on the top menu to close it out. This can also be done for multiple Message records.
 - c. **Batch:** If the message should move to a separate batch for further review, click **Batch** icon .
 - d. **Reassign:** If the message should be assigned to another IQ user to review, click on the three-dot icon, then **Reassign** and choose the correct staffer.
 - e. **Add a Service:** If the Message will need to be turned into a Casework, Flag Request, etc. click on the **Add a Service** icon  and choose the appropriate Service.

Campaigns without Rule

1. Click on **Campaigns without Rule**.
2. Review the Campaigns information under the **Summary** tab, including how many open messages there are and the Sample Message at the bottom. This will give you an idea for what the Campaign is about.



Campaign Name	Create Latest	Open	No	Total	Rule
#1 The Price of Eggs is Outrageous!!	2/6/2025	2000	2000	2000	No
#2 Home Ownership is out of reach for too many	8/23/2023	2000		2000	No
#3 Equitable Education Opportunities for American Students	7/9/2024	2000	2000	2000	No
#4 Is climate change causing wildfires?	8/23/2023	1999	1999	1999	No
#5 Require Nutrition Classes in Public Education!	4/14/2023	1999	1999	1999	No
#6 NO MORE public speakerphone use!	4/14/2023	1999	2000		No
#7 Executive Order 2	2/6/2025	1000	1000	1000	No

Summary Variations Analysis Discuss Logs

Unbatched Count 2000

Total Count 2000

Assigned User No Assigned User

Assigned Issue No Assigned Issue

Variations 1

Response Rules

Auto-Send Rules

Batches Unbatched(2000)

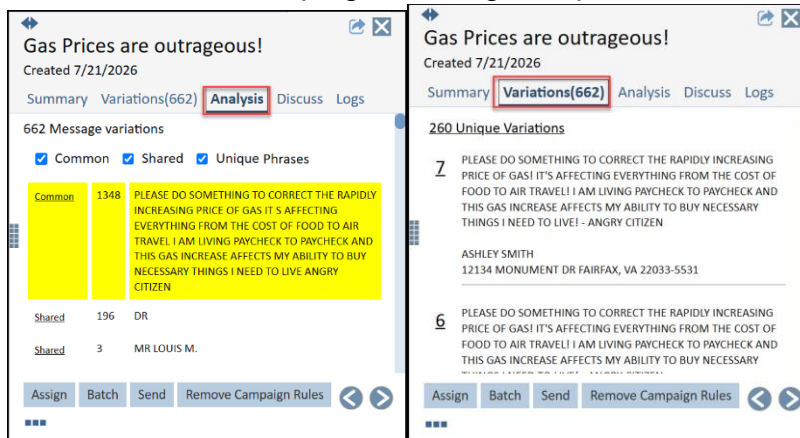
Open Count 2000

Responses

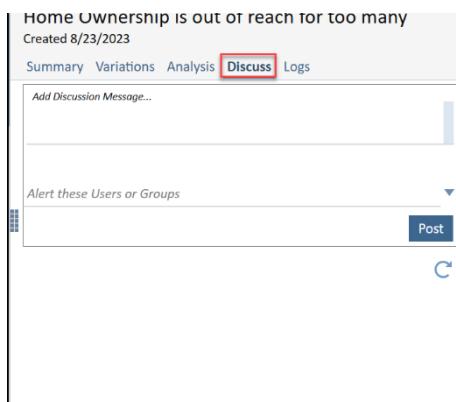
Sample Subject The Price of Eggs is Outrageous!!

Assign Batch Send

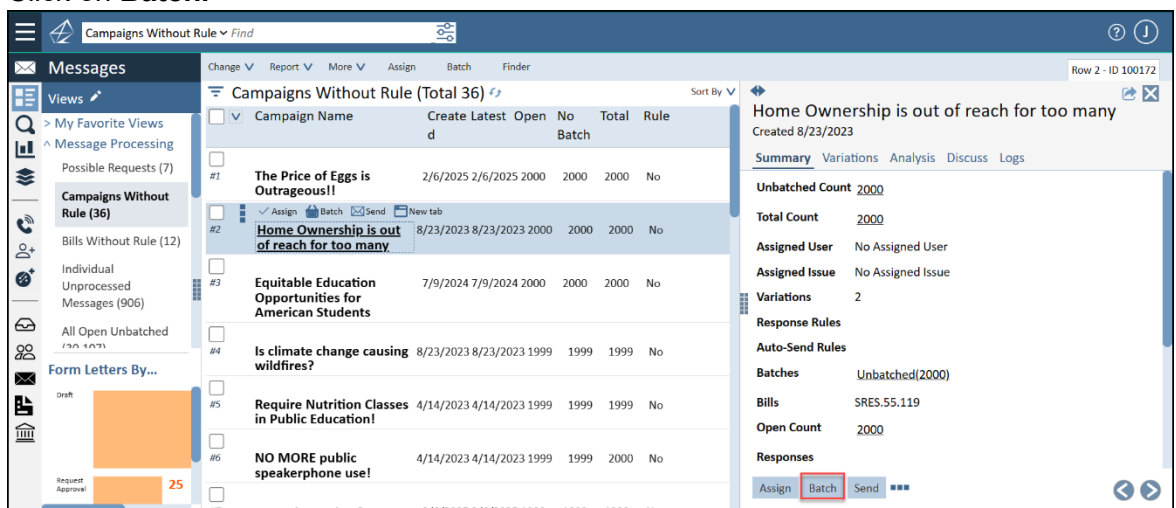
- Click on the **Variations and/or Analysis** tab to review any message variations in the campaign that might require further review.



- After analyzing the campaign, you can also click on the **Discuss** tab to start/reply to any discussions about this Campaign. Note, viewing the details of a message with an active discussion will display a discussion notification pop up.



- Click on **Batch**.



6. Take one of the following actions:
- Add Campaign to an existing Batch:** Click into the **All Batches** field to view all active Batches for your office. Choose one of these batches for your campaign.

Campaign Batch and Issue Update Rule

All Open and future messages added to this Campaign will have these settings applied.

Batches

☒ All Active Unlocked ☐ Remove Current

All Batches

EDUCATION BATCH (25)

Recently Used Batches

BILL AUG 14 (2501)

COVID TEST BATCH (2)

Update Cancel

- Add Campaign to a New Batch:** Click on the  icon to create a New Batch. Type in the name of the Batch. Click **Save**.

Add Batch

Batch Name

TEST BATCH

Description

Save Close

7. Now you will have the ability to review/create the **Batch Response Rules** and the **Batch Auto Send Rules**. Add/update the rules at this time by clicking the  icon.

Add Batch Response Rules

Batch
NUTRITION BATCH

Comments

☐ Add to existing ☐ Update if empty ☐ Remove existing

TRAINING - For training purposes

Issues

Affiliations

Bill

☐ Supports ☐ Opposes ☒ No Position

Assigned To
Jonathan Kilgore ☒ Include History

Letter Name
Sample Thank You Member - Leg Meetings

☐ Create New Letter
☐ No Response and Close

Save Close

Add Auto-Send

Automatically approve and email all unrestricted open messages in this batch that have an approved version of the letter...

Send on these days: ☐ Sunday ☒ Monday ☐ Tuesday ☒ Wednesday ☐ Thursday ☒ Friday ☐ Saturday

Start Sending these messages at 03:00 PM

Messages must be at least 24 hours old before they are eligible for auto-sending.

Stop automatically sending messages on 12/31/2025

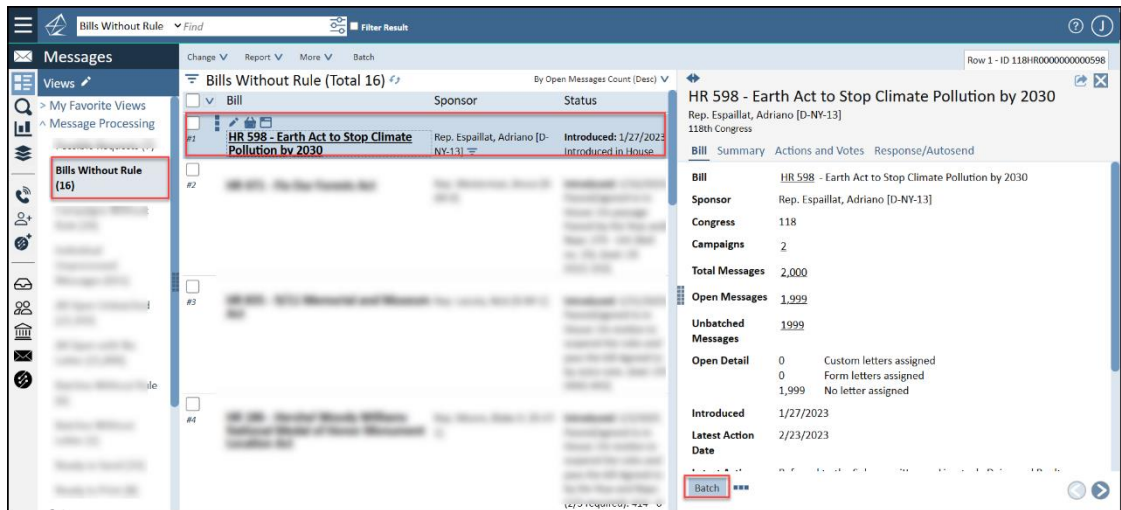
Continue Auto-Send Cancel

8. Click **Update**. The Campaign (including all current Open Messages and future Messages added to the campaign) has now been Batched with the **Response Rules** and **Autosend Rules** assigned.

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Bills without Rule

1. Click on **Bills without Rule**.
2. Review the information about the Bill, in the **Bill** tab. This includes what the bill is about, how many open/total messages there are for it, and how many campaigns are associated with it.



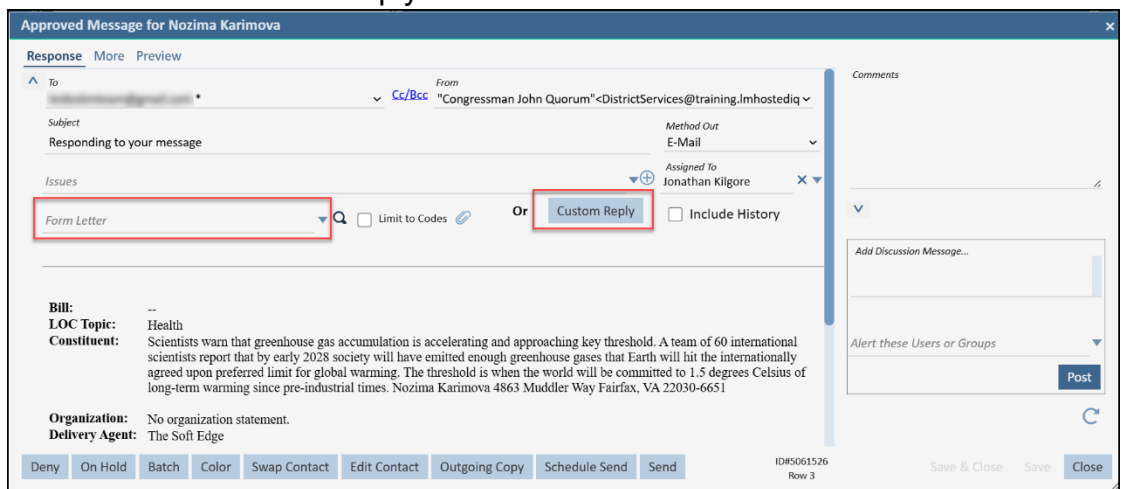
3. Click on **Summary** to learn more about the Bill.
4. Just as with Campaigns, click **Batch**.
5. Follow steps 6-8 from the **Campaigns without Rule** section.

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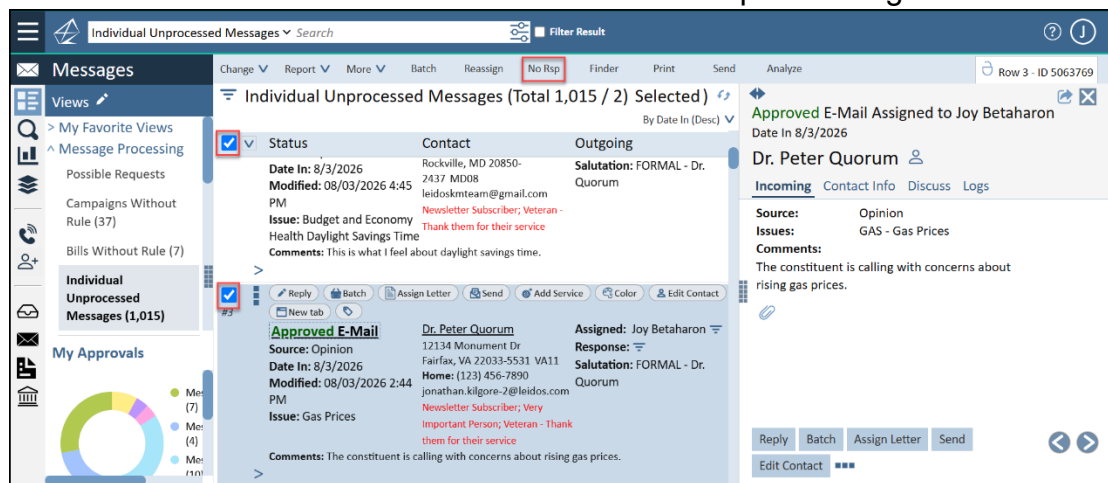
Individual Unprocessed Messages

These are emails that IQ has received that **are not assigned to any individual IQ User**. You can then do one of the following:

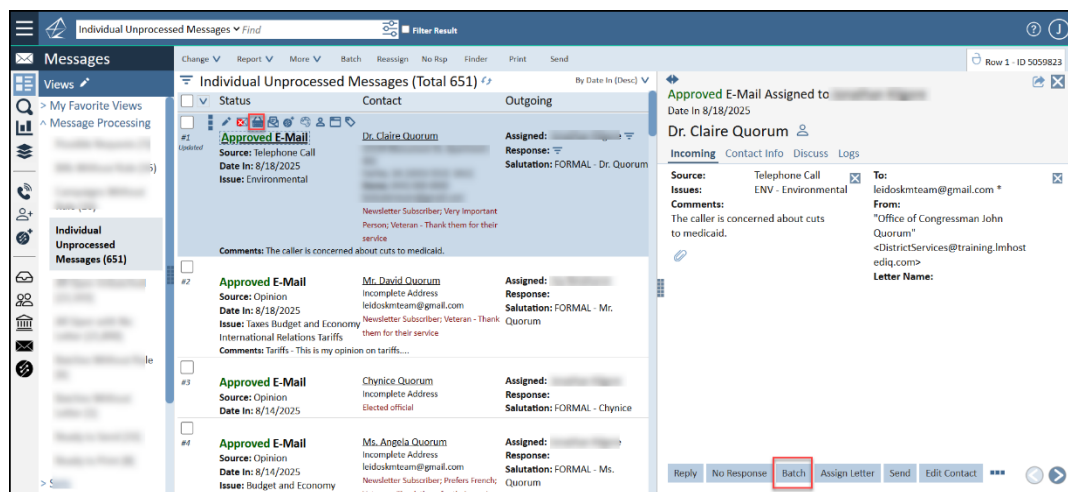
1. **Reply:** Double Click on the message or click the  in row action to send a Form Letter or Custom Reply to the constituent.



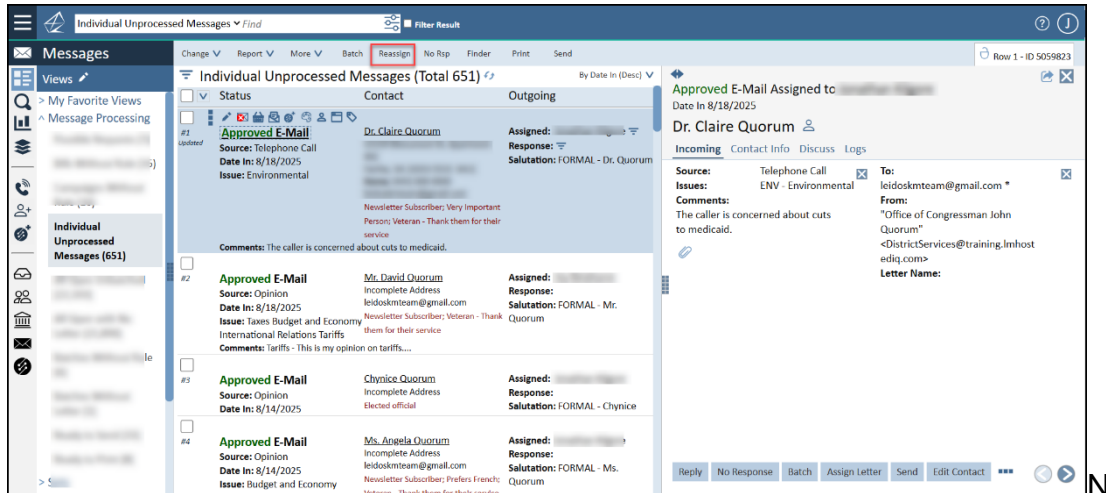
2. **Close with No Response:** If the message requires no response or service, click on the check box next to it and select the **No Rsp** button on the top menu to close it out. This can also be done for multiple Message records.



3. **Batch:** Click the **Batch** quick action or the  in row action and then select an existing Batch or create a new one that the Message should be added to. Review steps 6-8 in the [Campaigns without Rule](#) section for more information.



4. **Reassign:** If one or more messages should be Reassigned to another user, check the box next to those Messages and click **Reassign** at the top of the page.

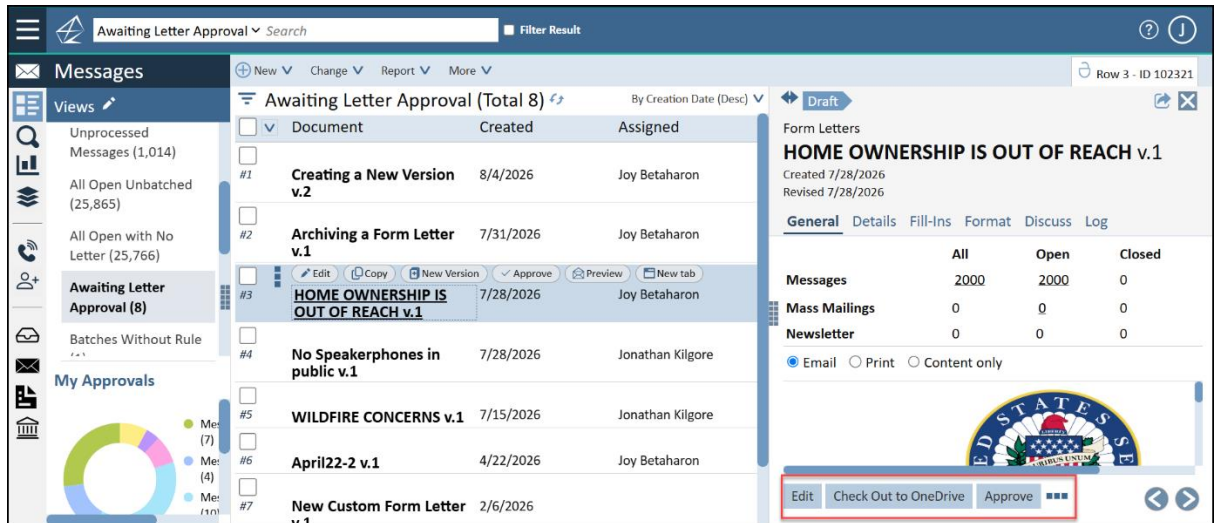


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Awaiting Letter Approval

This view shows all Form Letters that have Open Messages tied to them that have not yet been approved. Letters in this view should be edited and approved as soon as possible to ensure timely responses to your constituents. To do this:

1. Click on **Awaiting Letter Approval**.
2. Click on the Letter to approve. Note you can see how many open messages are associated with it in the Reading Pane on the right.
3. Click **Edit** to edit the content of the letter or click **Approve**.
 - a. ***Note:** If you have an Office 365 account and have connected it to your IQ5 (talk to your IQ Consultant for assistance), you can click **Check Out to OneDrive** and edit the document in Word collaboratively with other Office 365 users. The most recently saved version of the document can then be easily “checked in” to IQ5.
4. Repeat with each letter until none remain.

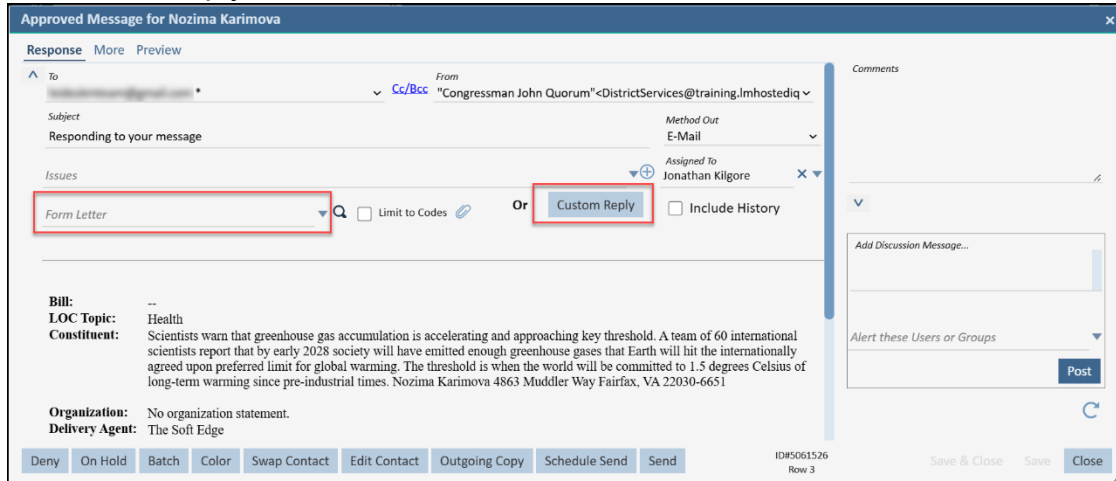


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All Open Unbatched

Within this view you can see every open message for the office that has yet to be batched. Within this view you can:

1. **Reply:** Double Click on the message or click the  to send a Form Letter or Custom Reply to the constituent.



5. **Close with No Response:** If the message requires no response or service, click on the check box next to it and select the **No Rsp** button on the top menu to close it out. This can also be done for multiple Message records.
2. **Batch:** Click the box next to the messages that should be batched, then click **Batch**. Then select an existing Batch or create a new one that the Message should be added to. Review steps 6-8 in the [Campaigns without Rule](#) section for more information.

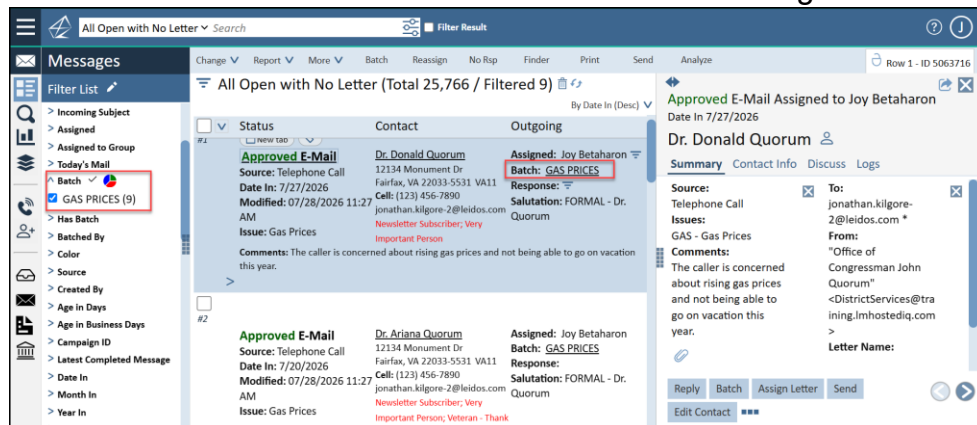
3. **Reassign:** If one or more messages should be Reassigned to another user, check the box next to those Messages and click **Reassign** at the top of the page.
4. **Finder:** Select all the Messages and click on **Finder** to have IQ scan through the emails and present you with “campaigns” of similar messages that can then be placed into Batches

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All Open with No Letter

This view lets you see all open messages that may or may not have been batched, but have no Letter assigned. Viewing the messages that have been Batched but have no letter assigned can help you find Batches that don't have a letter as part of their response rule. To do this:

1. Click on **All Open with No letter**.
2. Click on the  icon.
3. Click on the **Batch** filter.
4. Click on the box next to the Batch name you want to view.
5. Click on the **Batch** name in the list on one of the Messages



6. Click on **Response Rule** and edit to include a Form Letter.
7. Click **Update**.

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Batches without Rule

1. Click on **Batches without Rule**.
2. Click on **Response Rule** and add the rules you'd like.
3. Click on **Auto Send** and add in an auto send rule.

4. Move to the next Batch without Rule and repeat.

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Batches without Letter

This view lets you see any Batch that has a response rule in place **but does not have a letter assigned**.

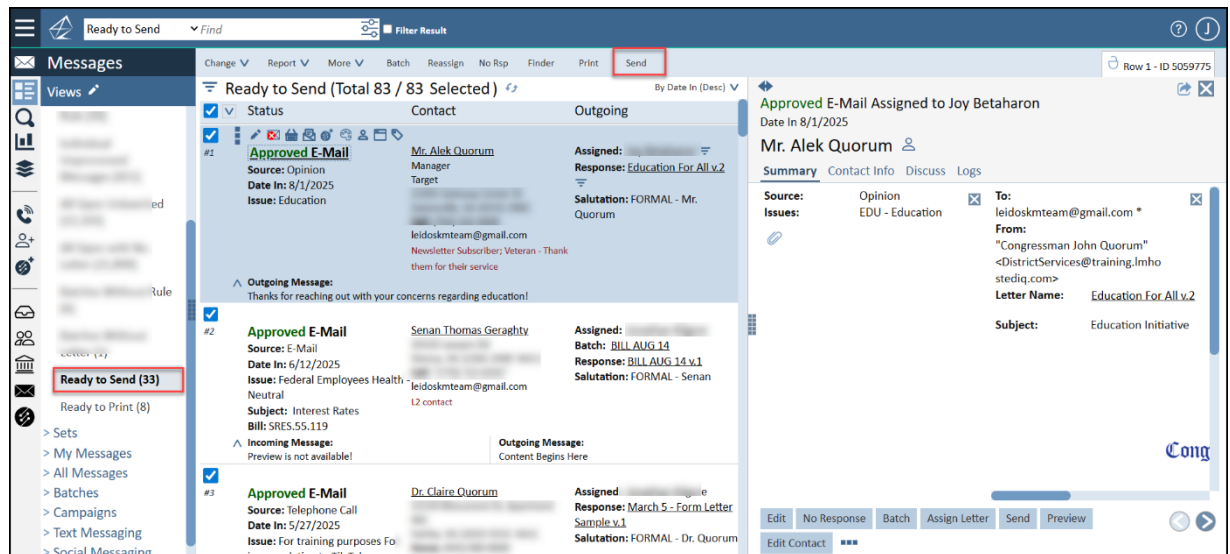
1. Click on **Batches without Letter**.
2. Click on **Response Rule** and edit to include a Form Letter.
3. Click **Update**.

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Ready to Send

This view allows you to manually email Form Letters to constituents for the whole office. A message appears here if the message Status is Approved, the Outgoing method is set to email, and the Form Letter assigned is also Approved. To send the letters:

1. Click on **Ready to Send**.
2. Click the **Select All** box.
3. Click **Send**.



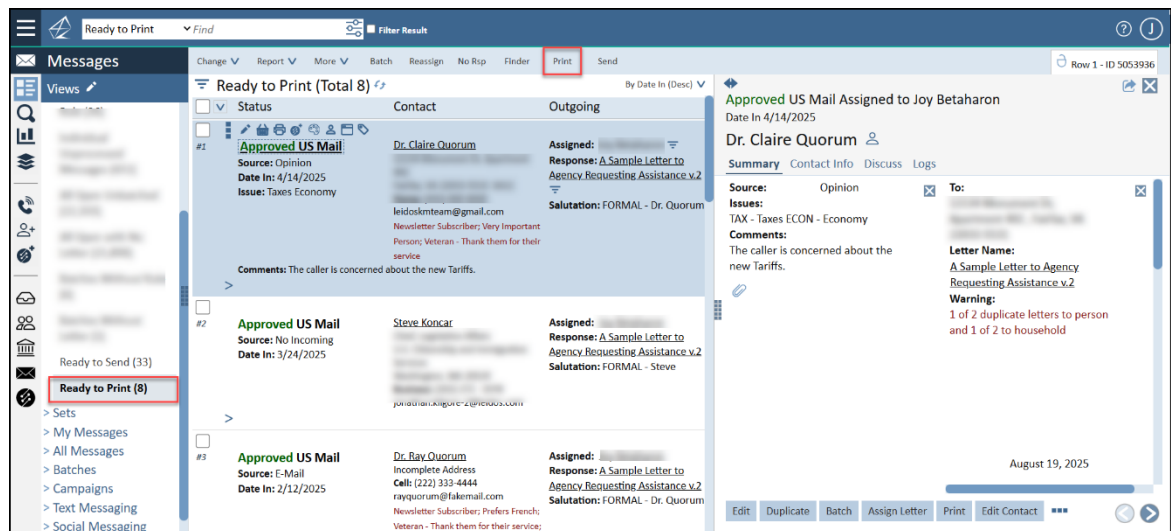
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Ready to Print

This view allows you to manually print Form Letters to mail to constituents for the whole office. A message appears here if the message Status is Approved, the Outgoing

method is set to US Mail, and the Form Letter assigned is also Approved. To print the letters:

1. Click on **Ready to Print**.
2. Click the **Select All** box.
3. Click **Print**.
4. Choose your **Print Type**.
 - a. It is recommended to print a **Preview** or **Draft** first to ensure the printer is working and the letter will appear as desired once printed. When ready to close the message, chose **Final**.
 - b. You may choose to print envelopes after the letter is downloaded.
5. Choose the Printer.
6. Click **Print Mail**.



Message Print Letter

Print Letters

Print Type

☐ Draft ☒ Preview ☐ Final ☐ Copy ☐ Envelope ☐ Label

☐ Print Envelopes after letter download

Printer Bin Control

- Message can be PREVIEW Printed

ID#5053936
Row 1

Print Mail

Cancel

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