

# Creating and Sending a Mass Mailing

**Market:** House, Senate

**Description:** These instructions teach users how to create and send content for a mass mailing using the IQ5 Outreach Wizard.

Click the following links to be brought straight to the topic:

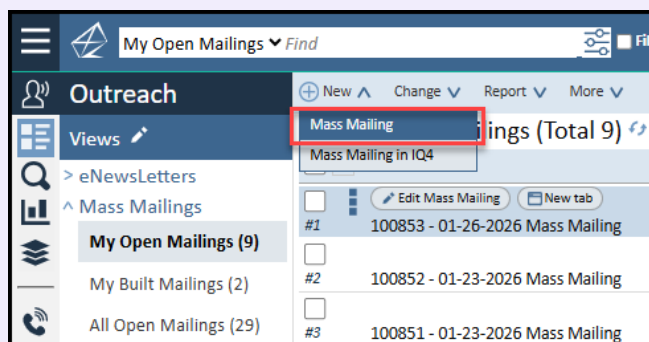
[Adding the Content](#)

[Selecting the Audience](#)

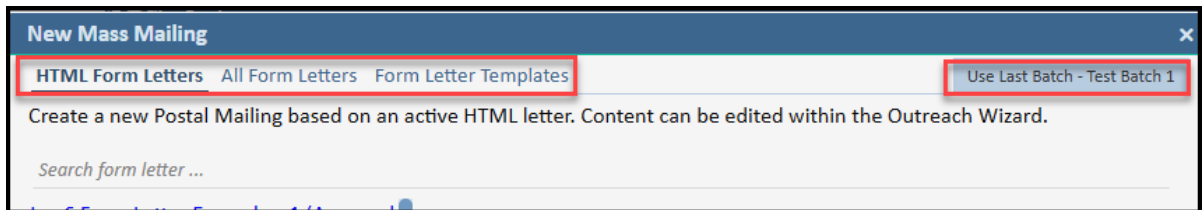
[Reviewing the Information](#)

## Selecting the Form Letter

1. Navigate to **Outreach > Mass Mailings > +New > Mass Mailing**.

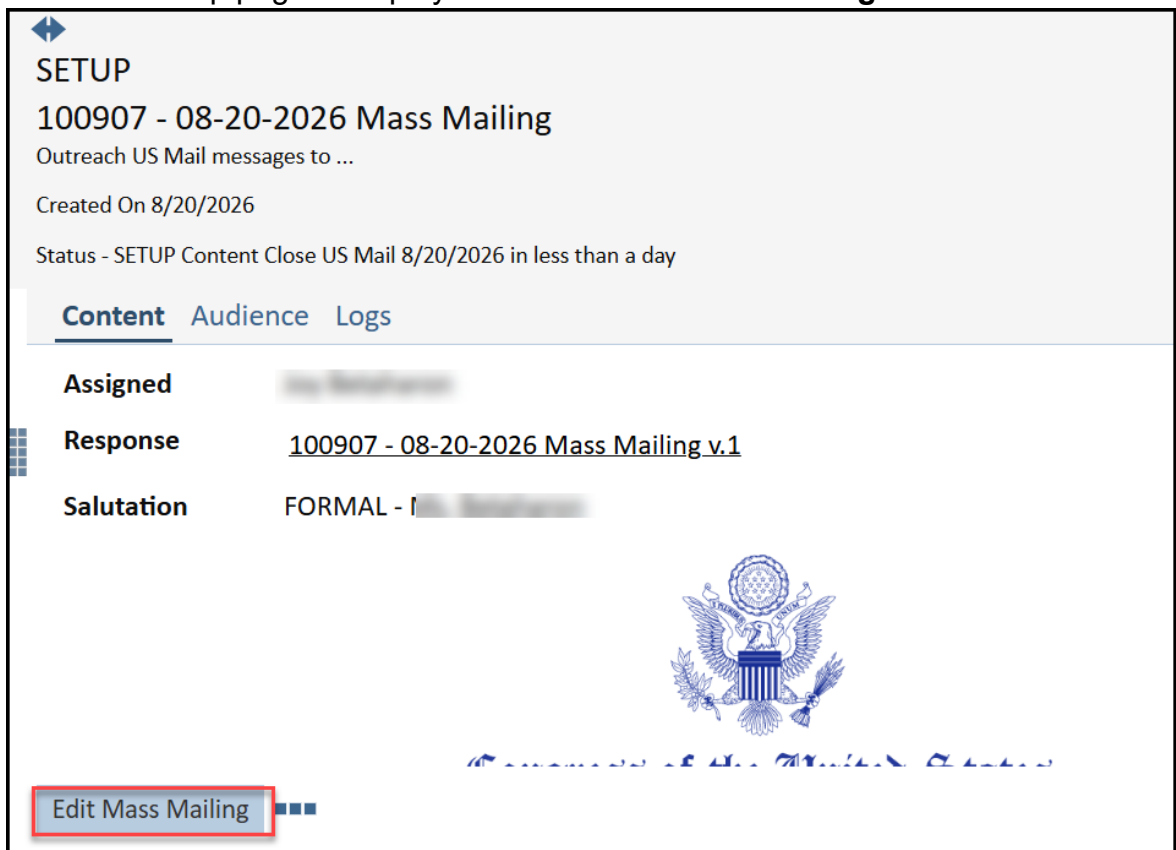


2. Select a form letter from the available options. You may also choose to use the Last Batch option. Note: this is not a legislative batch. Rather, it is the last mass mailing “batch” that was created.
- HTML Form Letters – Create a new postal mailing based on an active HTML letter.
  - All Form Letters – You may customize a recently sent eNewsletter or Reuse a recently sent eNewsletter.
  - Form Letter Templates – Create a new postal mailing starting with an approved form letter template.

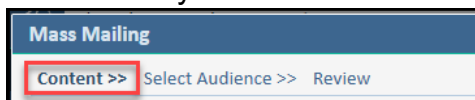


## Adding the Content

1. The letter Setup page is displayed. Select **Edit Mass Mailing** to edit.

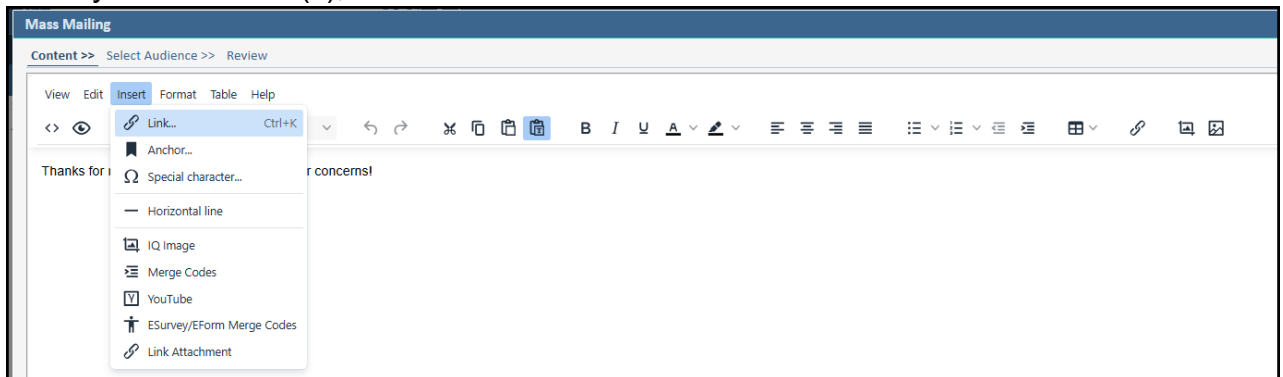


2. The Mass Mailing Wizard opens, and you may now edit the mailing as you are automatically set to the **Content** step.



3. Click into the content window. Modify the content using the menu. Content editing functionality includes the ability to edit the font, insert hyperlinks, images,

YouTube links, and merge codes, as well as insert surveys. Hover the cursor over an icon or click into the different menu options (view, edit, insert, etc.) to identify their function(s), as needed.



4. Click **Preview** to send a preview of the mass mailing to yourself and/or other staffers to ensure the content looks the way you would like. Note that clicking “preview” will automatically save the mass mailings content.
5. Click **Save**.

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## Selecting the Audience

1. Click **Select Audience**.



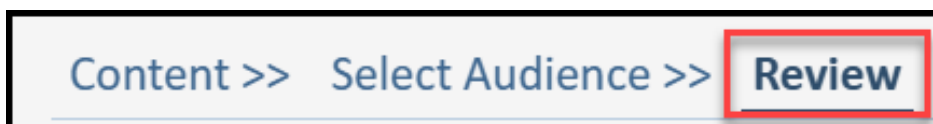
2. Click into **Select Audience** to determine if you want IQ to select contacts with any or with all of the attributes below. To determine the size of the audience, click **Review Audience Size**.
  - **Note:** If you select the dropdown in the **Start With** field, you will be able to select from a pre-saved IQ Contact list. If you use L2, you will see your 20 most recently created contact lists generated by an L2 import or update.

- Check the **Include Non-Primary Emails in CC** to include all of a contact's email addresses in the Outreach, not just their listed primary.
- If not starting with a pre-made list, use the **Include** and **Exclude** fields to build a custom audience. **\*Note:** You can save your selected Include and Exclude options as your default by clicking **Set Default**
- In the **Build Method** dropdown, you may choose to only build email or print batches, based on the communication preference of constituents. The options include:
  - Email only
  - Print Only
  - Email Preferred
  - Print Preferred

3. Click **Save**.

## Reviewing the Information

4. Click **Review**.



5. Review the **Name**, **Subject** and **From** fields on the left and make edits as needed. You may also add issue codes, if desired. Click **Build** in the bottom left corner.

The screenshot shows the 'Mass Mailing' window with the 'Review' tab selected. The 'Name' field contains '100855 - 01-27-2026 Mass Mailing', the 'Subject' field contains 'Test Mailing 1', and the 'From' field contains '"Congressman John Quorum" <DistrictServices@training.lmhostediq.com>'. The 'Directory' field contains '5--Newsletter'. The 'Issues' section shows a list of issues, with 'TRAINING--for training purposes' selected. The 'Build' button is highlighted with a red box.

6. In the **Build into Print and Email Mailings** window, view the summary information and click **Build** to begin. You may also enter a **Mass Mailing Batch Name** to reference in the future.

The screenshot shows the 'Build into Print and Email Mailings' window. The 'Mass Mailing Batch Name' field is highlighted with a red box. The summary information states: 'There are 65,351 total contact records in the Email Preferred selection criteria. It will generate one emailed Mass Mailing to 293 contacts. And it will also generate another printed Mass Mailing to 65,058 contacts.' The 'Build' button is highlighted with a red box.

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