

Sending a Message via a Service Record

Market: House, Senate

Description: Within the Services module, users can email and respond to the constituents via Form Letter or a customized response. These instructions teach users how to create and send these messages.

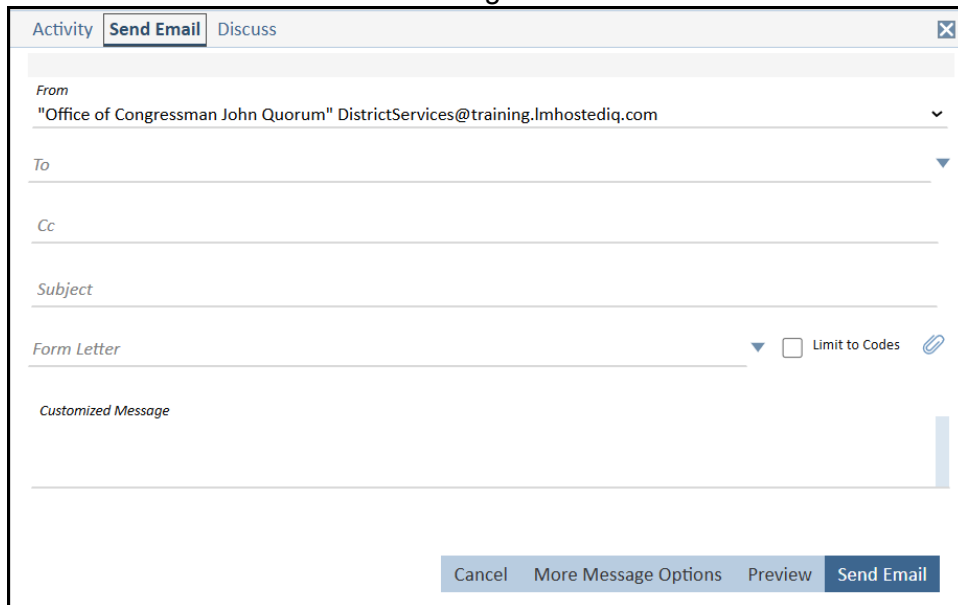
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Sending a Quick Message

1. Click on **Send Email** next to **Activity** on the right-hand side of your Service.
2. Fill in the fields and choose a **Form Letter** or write a **Custom Message** in the space below.
 - a. ***Note:** The Template used when writing a Custom Message is determined by the **Default Quick Email Message Format User Setting**. To update this:
 - i. Click on your first initial in the top right hand corner → User Settings → Messages → Default Quick Email Message Format.
3. Click the Paper Clip icon to add an **Attachment**.
4. Choose **More Message Options** to see the full Message Sending screen.
5. Click **Preview** to send an email preview to yourself/others prior to sending.

6. Click **Send Email** to send the Message.

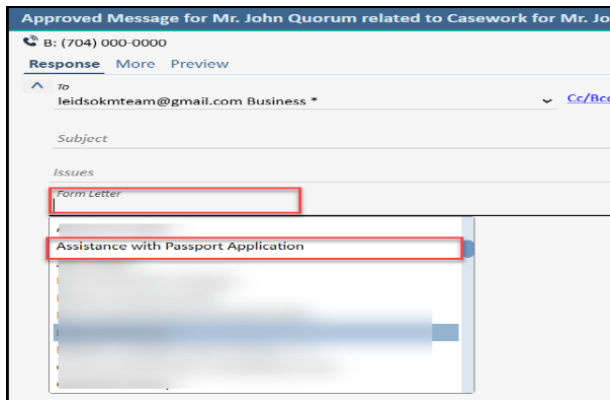


Sending a Message

1. Open an active service record.
2. Select the envelope icon next to the Primary or Other Contacts.



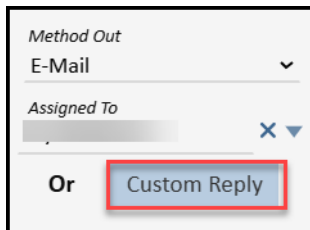
3. Select the option to respond to the constituent.
 - a. **Option - Form Letter**
 - i. Complete all necessary fields.
 - ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.



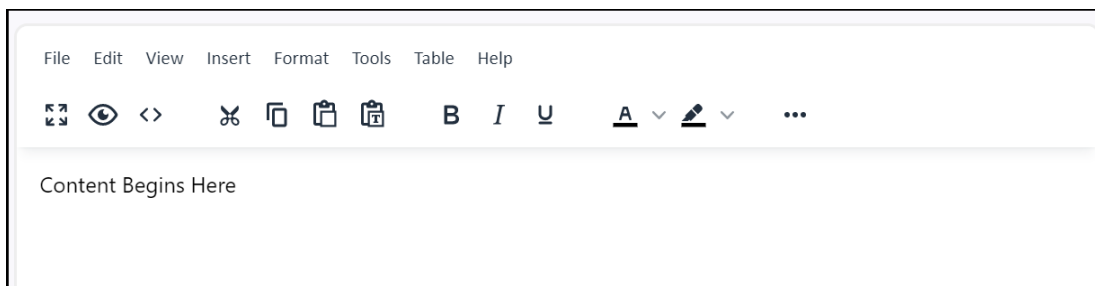
- iii. Select **Send**. (If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

b. Option - Custom Reply

- i. Click the **Custom Reply** button.



- ii. Utilize the full-screen option for the editor by clicking the  button.



- iii. Select **Send**. (You may need approval for the custom reply. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

Sending a Follow Up Message

Once the email has been sent out of the Service record, it will show in the Activity Stream. Next to the completed message is a button labeled **Follow Up**. The Follow Up action allows you to send a new email message to the recipient of your completed Message that includes your previously sent emails. To do this:

1. Navigate to your Service record and find your completed Message in the Activity Stream.
2. Click on **Follow Up**.
3. The **Send Email** tab will open with the **To** field and **Subject** already filled out.
4. Scroll down and type in your **Custom Message**.
 - a. Scroll down further to see the previously sent email.
5. Click **Send Email**.

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