

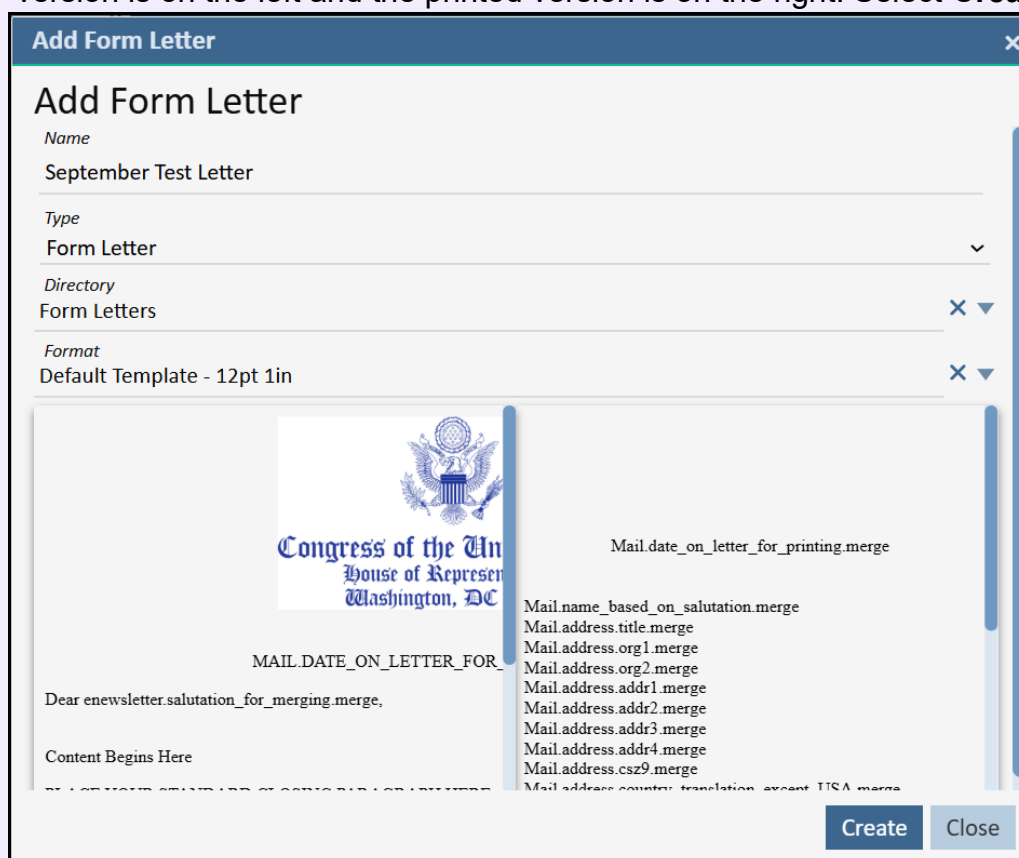
Creating a Form Letter

Market: House, Senate

Description: This details the steps for creating a form letter.

Creating a New Version of a Form Letter

1. Navigate to **Library** → **+New** → **Form Letter**.
2. Enter the name for your new **Form Letter**. Select the library directory location to store the **Form Letter**. The default template will display in the Format field, but you can change it. A preview of the selected format will display. The email version is on the left and the printed version is on the right. Select **Create**.



Add Form Letter

Add Form Letter

Name
September Test Letter

Type
Form Letter

Directory
Form Letters

Format
Default Template - 12pt 1in

Preview:

Left (Email):

Congress of the United States
House of Representatives
Washington, DC

MAIL.DATE_ON_LETTER_FOR_MERGING.merge

Dear newsletter.salutation_for_merging.merge,

Content Begins Here

Right (Printed):

Mail.date_on_letter_for_printing.merge

Mail.name_based_on_salutation.merge

Mail.address.title.merge

Mail.address.org1.merge

Mail.address.org2.merge

Mail.address.addr1.merge

Mail.address.addr2.merge

Mail.address.addr3.merge

Mail.address.addr4.merge

Mail.address.csz9.merge

Mail.address.country_translation_except_USA.merge

Create **Close**

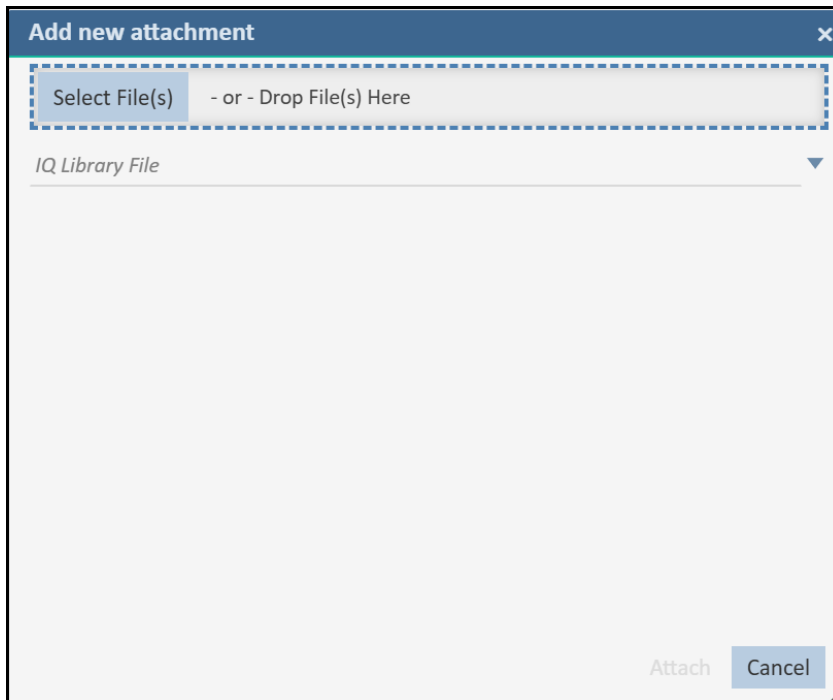
3. The Draft **Form Letter** view will open. Click the **Edit** button.
 - a. **Note***: The **Check Out to OneDrive** is only available for offices that have connected their Office 365 account with IQ. Talk to your IQ Consultant for more information.

The screenshot shows the 'All Form Letters' interface. At the top, there's a search bar and a 'Filter Result' button. Below that, there are tabs for 'New', 'Change', 'Report', and 'More'. The main content area shows a draft letter titled 'July Letter v.1' with creation and revision dates of 7/30/2026. Below the letter title, there are tabs for 'General', 'Details', 'Fill-Ins', 'Format', 'Discuss', and 'Log'. A table with columns 'All' and 'Open' shows counts for 'Messages', 'Mass Mailings', and 'Newsletter'. At the bottom, there are radio buttons for 'Email', 'Print', and 'Content only'. The 'Edit' button is highlighted with a red box.

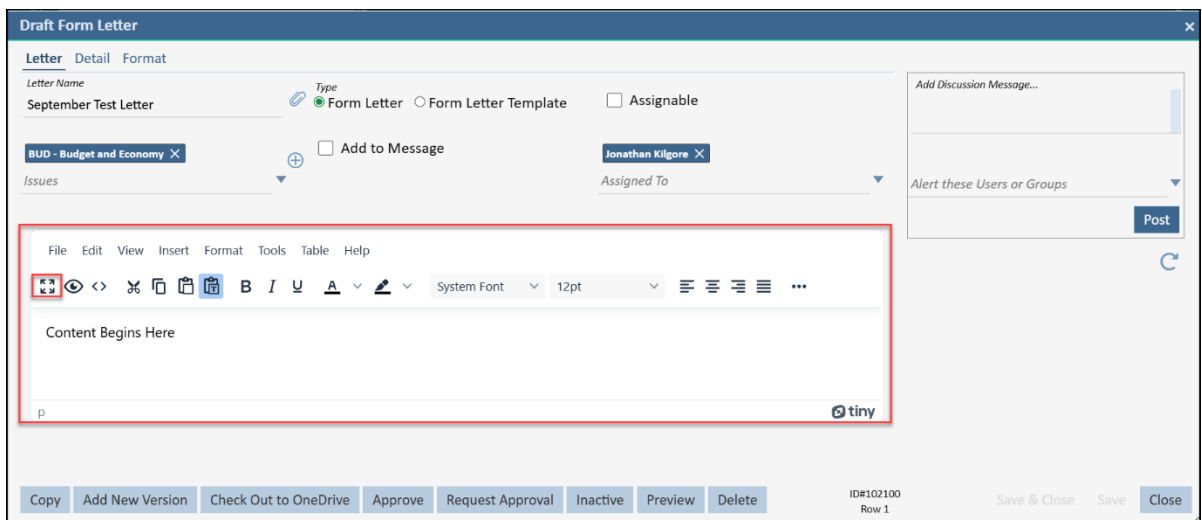
4. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.
5. Select **Add to Message**. This ensures that all correspondence that will use this Form Letter will include the issue code(s) you selected.

The screenshot shows the 'Draft Form Letter' window. The 'Letter' tab is selected. The 'Letter Name' is 'September Test Letter'. The 'Type' is set to 'Form Letter'. The 'Issues' field contains 'BUD - Budget and Economy'. The 'Add to Message' checkbox is checked and highlighted with a red box.

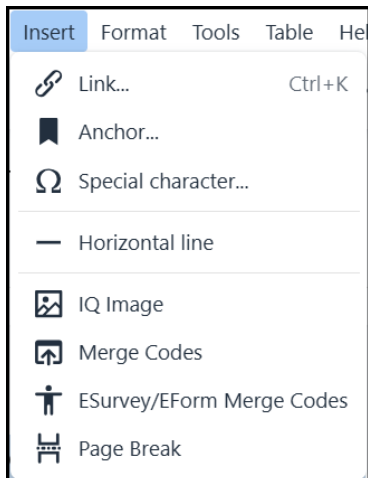
6. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach**.



7. Compose the content of the form letter by selecting the full screen mode button

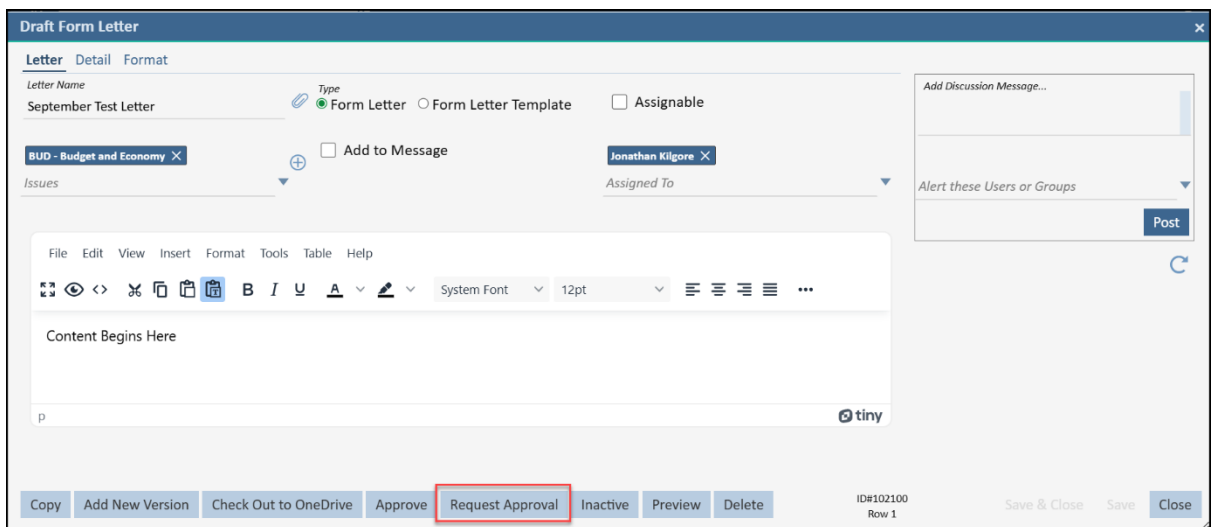


8. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, etc.



9. Click **Save**.

10. Click **Request Approval**. Then select your Form Letter Approver and click **Update**. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages while awaiting approval. Once the **Form Letter** is approved, you will be able to send the message with the approved **Form Letter**.



11. Click **Save**.

12. Click **Preview** to send an email preview or print a preview of the Form Letter.

13. Click the **Detail** panel to add additional information, including **Review Date**, **Email Subject/Address**, and **Affiliation Codes** on **Hyperlinks** in the Form Letter.

Creating a New Version of a Form Letter

1. Select the Form Letter, select Edit/Options  button and select **New Version**.

2. Make the appropriate selections in the **Create New Version of Form Letter** window and click **New Version** button.

Create New Version of Form Letter

×

Make New Version

☒

 Update all open messages to use this new version

☒

 Update all response rules to use this new version

ID#102326
Row 2

New Version

Close

3. The new letter will be automatically renamed as a new version number and will be set to **Draft** status.

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