

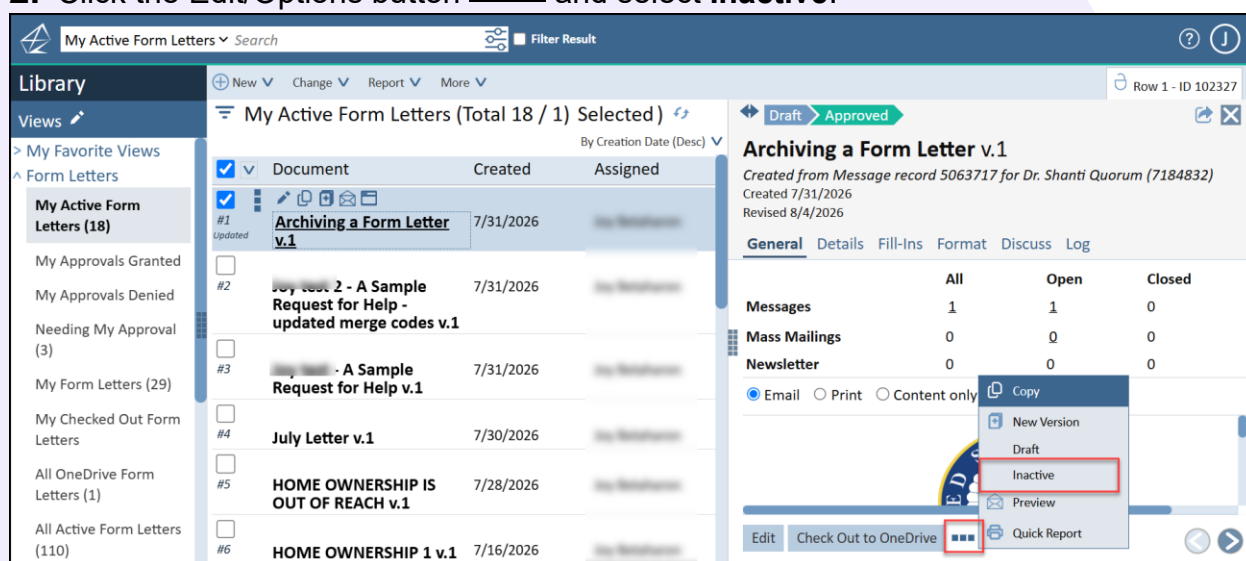
Making a Form Letter Inactive

Market: House, Senate

Description: When a Form Letter is no longer current or relevant, it can be put in an “inactive” status so that the letter is saved but can no longer be used for mailings.

1. Navigate to **Library** and select the Form Letter.

2. Click the Edit/Options button  and select **Inactive**.



The screenshot shows the 'My Active Form Letters' library with a table of documents. The document 'Archiving a Form Letter v.1' is selected. The 'Edit/Options' button (three dots) is highlighted, and a dropdown menu is open showing the 'Inactive' option.

Document	Created	Assigned
#1 Updated Archiving a Form Letter v.1	7/31/2026	Yes
#2 July Letter 2 - A Sample Request for Help - updated merge codes v.1	7/31/2026	Yes
#3 July Letter - A Sample Request for Help v.1	7/31/2026	Yes
#4 July Letter v.1	7/30/2026	Yes
#5 HOME OWNERSHIP IS OUT OF REACH v.1	7/28/2026	Yes
#6 HOME OWNERSHIP 1 v.1	7/16/2026	Yes

The dropdown menu for the 'Edit/Options' button shows the following options: Copy, New Version, Draft, **Inactive**, Preview, and Quick Report.

3. The Form Letter is now set to **Inactive**.

Draft

Approved

Inactive

Archiving a Form Letter v.1

Created from Message record 5063717 for Dr. Shanti Quorum (7184832)

Created 7/31/2026

Revised 8/4/2026

General

Details

Fill-Ins

Format

Discuss

Log

	All	Open	Closed
Messages	<u>1</u>	<u>1</u>	0
Mass Mailings	0	<u>0</u>	0
Newsletter	0	0	0

☒ Email
 ☐ Print
 ☐ Content only



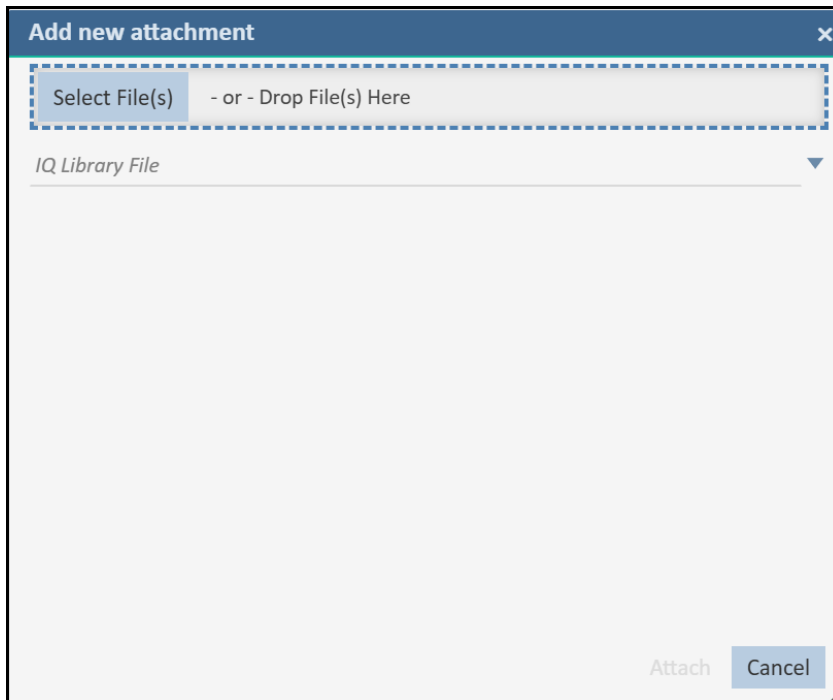
4. The Draft **Form Letter** view will open. Click the **Edit** button.
 - a. **Note*:** The **Check Out to OneDrive** is only available for offices that have connected their Office 365 account with IQ. Talk to your IQ Consultant for more information.

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 navigation tabs: '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.

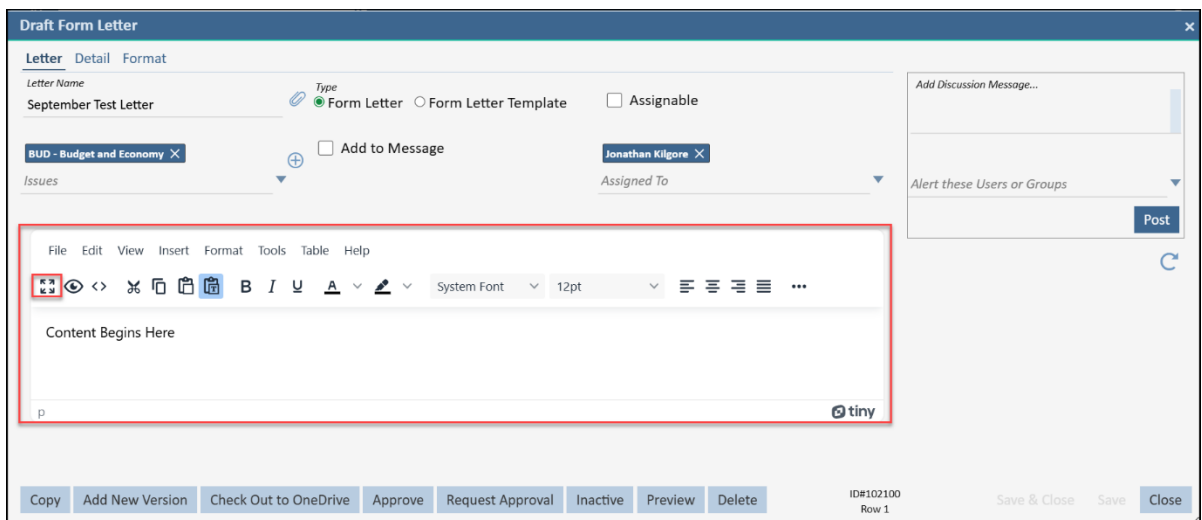
5. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc., as well as for reporting.
6. 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.

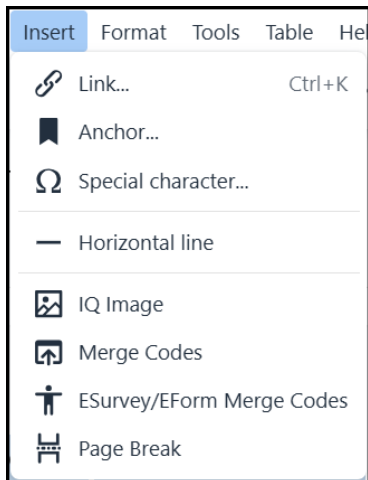
7. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach**.



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

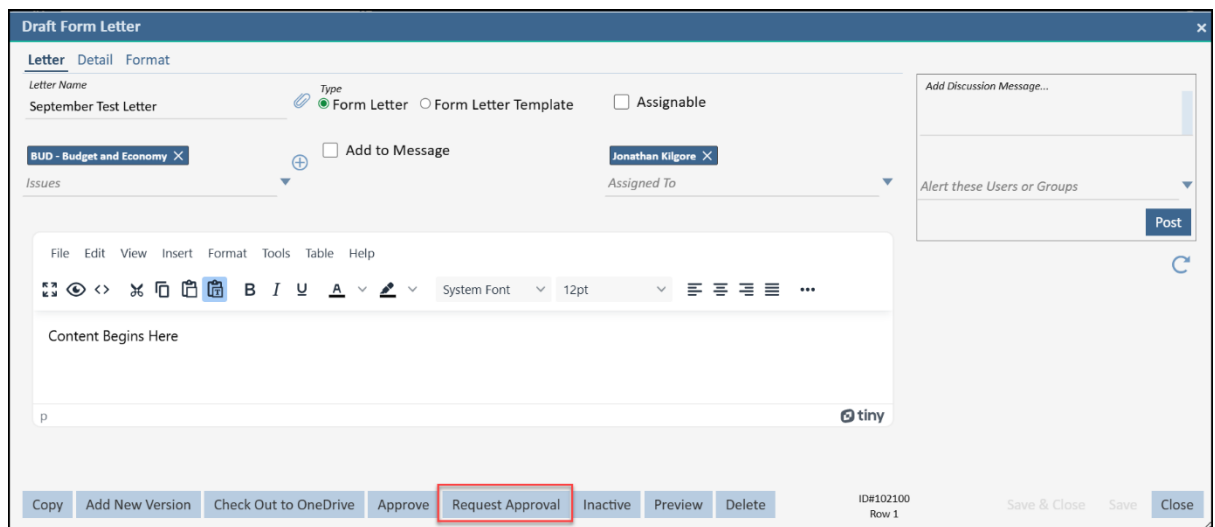


9. Note the different options for what can be inserted into the Form Letter, including Hyperlinks, images, etc.



10. Click **Save**.

11. 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**.



12. Click **Save**.

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

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

Draft Form Letter

Letter **Detail** Format

Review Date
mm/dd/yyyy

Expiration Date
mm/dd/yyyy

Directory
Form Letters

Description

Duplicate Letters

Library Codes

Service Codes

Service Categories

Report Duplicates

Envelope

Yes

No envelope selected

Email Subject

Always Use

Email Address

Bills

☐ Supports
☐ Opposes
☒ No Position

Email Format

Print Format

100090 - Default Template - 12pt 1in

100090 - Default Template - 12pt 1in

Add Discussion Message...

Alert these Users or Groups

Post

Copy

Add New Version

Check Out to OneDrive

Approve

Request Approval

Inactive

Preview

Delete

ID#102100

Row 1

Save & Close

Save

Close

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