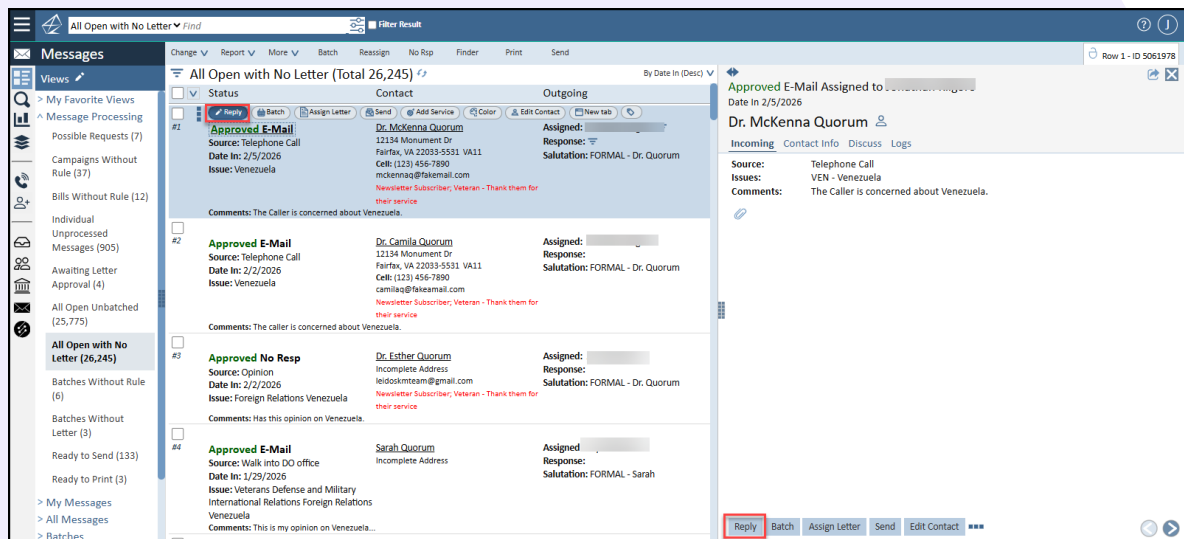


Creating a New Form Letter from a Custom Reply

Market: House, Senate

Description: When typing a Custom Reply to a Constituent, you may wish to save that reply as a new Form Letter for future re-use. This guide walks through the process of accomplishing this.

1. Click on **Reply** for the Open Message you are typing your Custom Response to.



2. Click on **Custom Reply** and type out your response.

Approved Message for Dr. Shanti Quorum

H:

Response More Preview

To: [Redacted] Cc/Bcc: "Office of Congressman John Quorum" <DistrictServices@trainw...>

Subject: [Redacted]

Method Out: E-Mail

Assigned To: [Redacted]

Form Letter: [Redacted] Limit to Codes [Redacted] Or Custom Reply

Comments: The caller is concerned with rising gas prices.

Frunked Mail? [Redacted]

Custom Field? [Redacted]

Add Discussion Message...

Deny On Hold Batch Archivist Report Color Swap Contact Edit Contact Outgoing Copy Schedule Send ID#5063717 Row 1 Save & Close Save Close

3. Type out a name for your new Form Letter under **Letter Name**, enter content, then click on **Save as New Form Letter**. It is best to click on the Fullscreen button  when writing letters.

On Hold Message for Dr. Shanti Quorum

H:

Response More Preview

Issues: Letter Name New Custom Form Letter

Assigned To: [Redacted]

Use Form Letter

File Edit View Insert Format Tools Table Help

System Font 12pt

This is my custom response that I want to save as a new form letter.

Approve Request Approval Deny Batch Preview Archivist Report Color Swap Contact Edit Contact

Save as New Form Letter Outgoing Copy

Comments: The caller is concerned with rising gas prices.

Frunked Mail? [Redacted]

Custom Field? [Redacted]

Add Discussion Message...

ID#5063717 Row 1 Save & Close Save Close

Fullscreen view:

IQ - Messages

iq5.iqhosted.com/TRAINING/listid/2_011

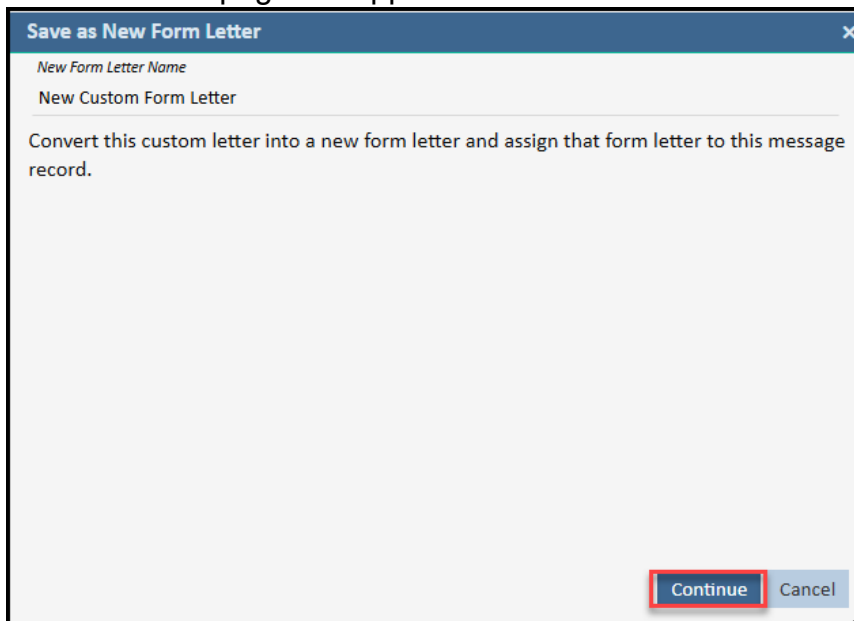
File Edit View Insert Format Tools Table Help

System Font 12pt

This is my custom response that I want to save as a new form letter.

Click on the Fullscreen button to return to the previous window.

4. A confirmation page will appear. Click **Continue**.

A screenshot of a software dialog box titled "Save as New Form Letter" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "New Form Letter Name" containing the text "New Custom Form Letter". Below the input field, there is a paragraph of text: "Convert this custom letter into a new form letter and assign that form letter to this message record." At the bottom right of the dialog, there are two buttons: "Continue" (highlighted with a red rectangle) and "Cancel".

5. Your New Custom Letter has now been saved as a new Draft Form Letter in the Library. Note that this letter will have to be approved in order to be sent.

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