

How to Create a Form Letter

Market: Federal/State/Local, House, Senate

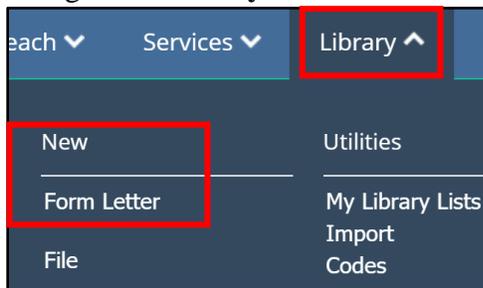
Module: Library

Purpose: This guide provides instruction on how to create a Form Letter.

Key Benefits

Form Letters are customizable letters that you can use/reuse to respond to volume of messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar in nature. Form Letters can be created from many modules in IQ. Although the starting point for this instruction is using the Library module, the steps to create a Form Letter is the same if it is created from other modules.

1. Navigate to **Library > New > Form Letter.**



2. Type the title for your new Form Letter, ensure **Type is set to **Form Letter**, and choose your **Directory**. The **Directory** is the folder where your Form Letter will be found within the **Library** module.**

The screenshot shows a form titled 'Add Form Letter'. It contains three input fields: 'New Form Letter Name' with the value 'New Form Letter QRG', 'Type' with a dropdown menu set to 'Form Letter', and 'Directory' with a dropdown menu set to 'Form Letters\DC'. The entire form area is enclosed in a red border.

3. Select your **Form Letter Template** and click **Add**.

4. Type 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 will ensure that **ALL** correspondences that will use this Form Letter will include the issue code(s) you selected.

6. Add attachments as needed. Drag and drop the file from your computer or select the paperclip icon to add the attachment. These attachments will automatically be included when this Form Letter is used.

The screenshot shows the 'Form Letter' configuration interface. At the top, there are tabs for 'General', 'Fill-Ins / References (0)', 'Format', 'Messages (0)', and 'Log (2)'. The 'Form Letter' title is centered. Below the title, there are several fields: 'Name' (New Form Letter QRG), 'Type' (Form Letter), 'Issues' (Select issues ...), and 'Attachments' (with a paperclip icon). To the right, there are buttons for 'Email View', 'Printed View', 'Assignable', 'View', and 'Edit Content'. The 'Attachments' field is highlighted with a red box.

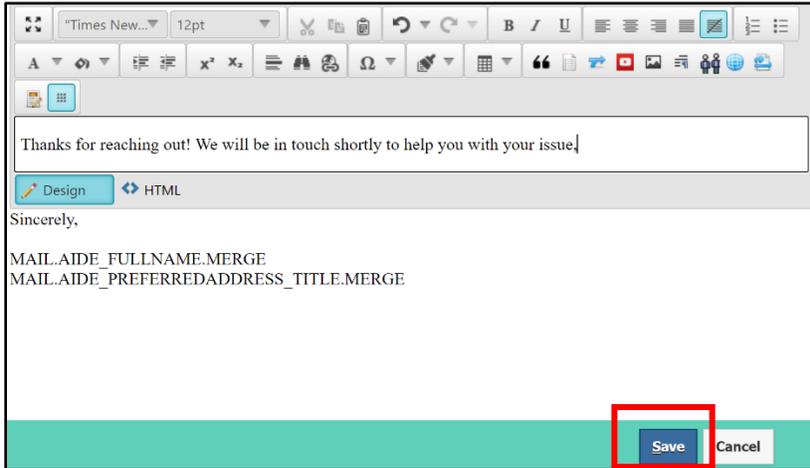
7. Click **Edit Content** to open the HTML editor. Type in the body of the Form Letter. Do note, if you type your text out in Microsoft Word and copy and paste it into the HTML editor, you will need to strip

the formatting by clicking this icon: 

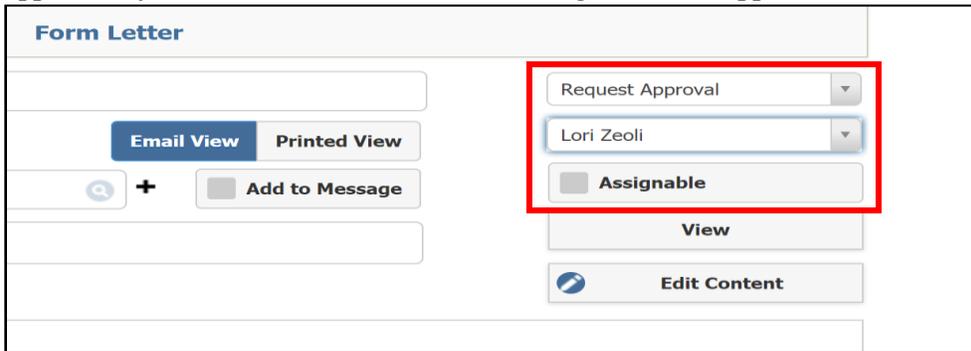
This screenshot is identical to the one above, but the 'Edit Content' button on the right side is highlighted with a red box.

The screenshot shows the HTML editor interface. At the top, there is a title 'MAIL.DATE_ON_LETTER_FOR_PRINTING.MERGE'. Below it, there is a salutation 'Dear newsletter.salutation_for_merging.merge,'. A rich text editor toolbar is visible, with the 'Strip Formatting' icon (document with pencil and arrow) highlighted with a red box. Below the toolbar, there is a text input area with the placeholder text 'Content Begins Here', which is also highlighted with a red box. At the bottom, there are buttons for 'Design' and 'HTML', and the text 'Sincerely,' followed by merge fields: 'MAIL.AIDE_FULLNAME.MERGE' and 'MAIL.AIDE_PREFERREDADDRESS_TITLE.MERGE'.

8. Click **Save**.



9. Change the **Status** of the Form Letter from **Draft** to **Request Approval**. Then select your Form Letter Approver. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages, campaigns, and bills while awaiting approval. Once the Form Letter is approved, you will be able to send the message with the approved Form Letter.



10. Click **Save**.

