

How to Create a Form Letter

- 1. Go to the Library Big Menu and under the New column, select Form Letter.
- 2. Type the name of the form letter in the **New Form Letter Name** field.
- 3. For the **Directory** field, use the default or select another one using the drop-down list.
- 4. Select a Format. Use the default format or select a different one from the list on the left.
- 5. Click the Add button. (IQ will open the Form Letter Library record)
- 6. Enter the Issue Code(s) and choose from the existing list.
- 7. Check the Add to Message check box to ensure the issue is tracked in correspondence.
- 8. Click the Edit Content button.
- 9. In the editing window, type the body of the letter.
- 10. Click the **Save** button.
- 11. Change the status from **Draft** to **Approved**.

Home Contacts	✓ Messages ✓ Out	reach 💙 Service	es 💙 🛛 Onboarding	g 💙 🛛 Library 🌱	Events 🗸	LegiStats 🗸	Admin 🗸			
Library » Form Letter									■ ID# 10125	
Approved For	m Letter FY17 B	udget Letter	v. 1						Actions 📀	
General	Fill-Ins / References (0)	Format	Messages (0)	Log (6)						
Form Letter								Detail		
Name:	FY17 Budget Letter					Approved	v			
Туре:	Form Letter				Assignable			Created By: Jodi Hughes Version # 1 of 1 Size: 1kb Created Date: 11/27/2016	-	
Issues:	🗶 BUD - Budget 💽 Add to Message Edit Content					ent				
Attachments:								Revised Date: 11/27/2016 Directory: Form Letters		
								Assigned To: Jodi Hughes Track Change: Manual Report Duplicates: Yes		
							Discussion			
			IRANETUU	JORUM				Alert these Users or Groups	0	
Dear enewsletter.salutation_for_merging.merge,								Add Discussion message		
Thank you for contacting my office regarding your concerns about the Budget FY2017.										
I appreciate your comments and should you have any further questions, please do not hesitate to contact me.								Post		
Sincerely,								Q. Search Discussions	Sort: ASC ×	
John Quorum Member of Congr	ess									

Form Letters with a status of Approved will be available to assign in Message records. To make a letter available even though it is not Approved, check the **Assignable** box in the Library record page.



How to Search for a Form Letter by Letter Name:

1. In the Library Big Menu, select All Form Letters in the Find Form Letters column.

2. In the Filter Text... field type the Letter Name or Content text and press Enter.

3. Click the **Plus** icon to expand the content of a Form Letter or click the **Gear** settings icon and select **Expand All Rows**.

4. To change the sort order, select the **Sort** button. **Note:** The default sort order is **Created Date (Desc)** (which is most recent first), but can be changed to **Document ID**, **Document Name**, **Pending Message Count**, **Revised Date or Total Message Count**.

Editing a Form Letter:

When the text of a standard Form Letter must be changed, you can make a **new version** of that letter while retaining the original letter and all references to it in Message records.

Setting the Status of a new version to *Approved* automatically changes the previous version(s) to *Inactive*. You can make as many versions of a letter as necessary to keep the letter current.

Make a New Version of a Form Letter:

- 1. In the Library Big Menu, type the name of the existing Form Letter in the Quick Search field.
- 2. Click the Form Letter name in the drop-down list to open the Library record.
- 3. In the Form Letter record page, open the Actions drop-down menu and select New Version.
- 4. If there are any open Messages (and/or Campaign Response Rules) with the older version of the Form Letter, then select either "Make a new version, leave open messages unchanged" or "Update messages for all versions, to the new version".
- 5. Click the **Continue** button. (*IQ creates the new form letter and opens the Library record*)
- 6. Click the **Edit Content** button to make any updates to the letter and click the **Save** button.
- 7. Change the *Status* to **Approved**.