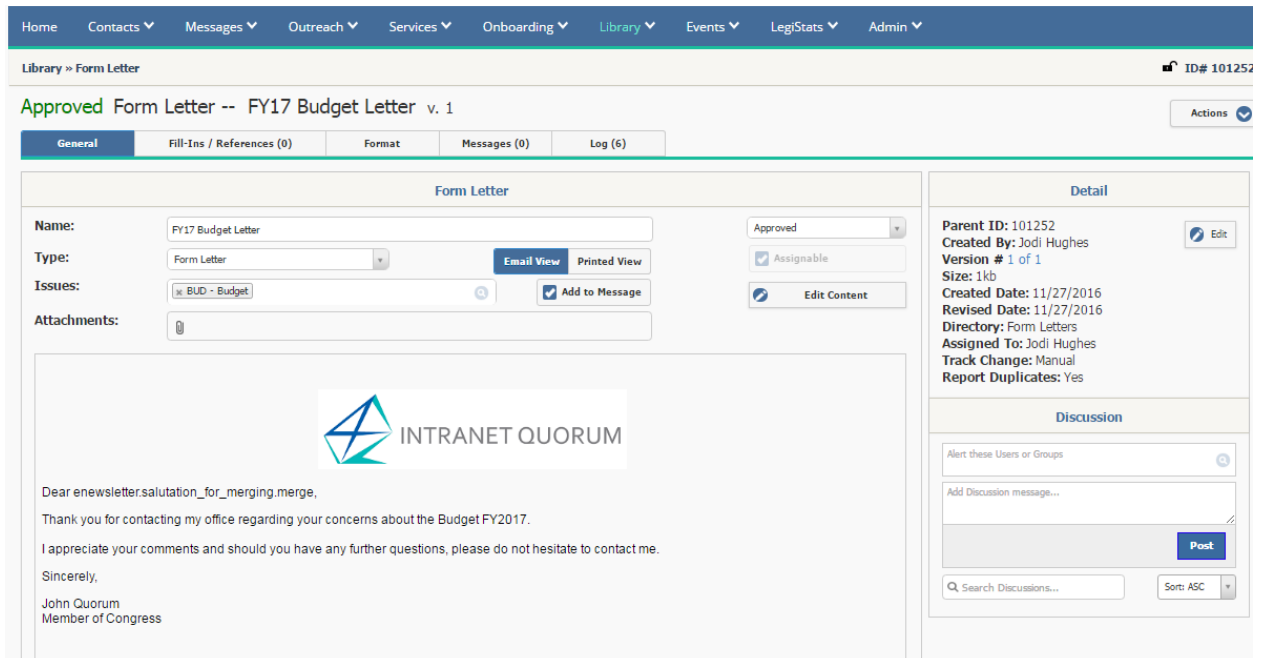# How to Create a Form Letter

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**.

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**.