

How to Manage Batches

Review and Respond to Messages That Have Been Batched:

1. In the **Messages** Big Menu, select **All Active Batches** in the **Utilities** column.
2. Scroll or use the *Text Filter* to find the batch name.
3. Click on the **Batch Name** link to open the batch.
4. **Select all** of the Message records in the batch and if you are ready to send the response, click on the **Send Email** in the action menu.
5. Select the **Send In** option (*Foreground Now, Background Now or Background Later*).
6. Click on the **Send Email** button.

Note: After all of the Message records in the Batch have a status of **Completed**, you should archive the batch by clicking the **Archive** Status link at the top of the Batch record or selecting the **Archive** in-row action in the List of Batches.

Review and Assign a Form Letter to Messages That Have Been Batched:

1. In the **Messages** Big Menu, select **All Active Batches** in the **Utilities** column.
2. Scroll or use the *Text Filter* to find the batch name.
3. Click on the Batch Name link to open the batch.
4. Select all (or a subset) of the Message records in the batch and click on the **Change** drop-down in the Action Menu and select **Data**.
5. Select the appropriate **Issue Code, Assigned To, and Form Letter** and confirm the **Outgoing Method**.
6. If you are ready to send the response, click on the **Send Email** radio button in the **Next Action** field and click the **Save** button.
7. Select the **Send In** option (*Foreground Now, Background Now or Background Later*).
8. Click on the **Send Email** button.