

Course Summary

Course Duration

30 min

Audience

All IQ Users

Method of Training

WebEx/remote

Market

House, Senate

Customer Service

US Senate email:
helpdesk_iq@scc.senate.gov

General Support Email:
support@IQservicedesk.com
Live Chat support available
within IQ
703-206-0188
Monday –Friday
7 AM to 7 PM (EST)

**Extended Hours vary by
contract.*

Website

www.intranetquorum.com

Document Revision Date:

December 2021

Workshop Agenda: Managing Form Letters in IQ

DESCRIPTION

A Form Letter is a customizable document used to reply to a volume of message records in IQ, thus reducing the time to response to constituents.

In this workshop, users learn to how create a Form Letter and apply it towards correspondences, services, and outreach activities in IQ.

OPTIONAL

To enhance the learning experience of this virtual training, participants may follow the instructions provided in the presentation by logging into their IQ account using an additional workstation.

Since the training session is a LIVE demonstration, please keep in mind that technical issues unrelated to the course may need to be addressed outside the session by an Office IQ Consultant.

1 Agenda

Creating a Form Letter

Adding Issue Code(s) and Service Code(s) to a Form Letter

Selecting and using a Form Letter to respond to Messages, Services, or Outreach Activities

Routing a Form Letter for Approval

Updating Form Letters

2 Wrap Up