

How to Create a New Version of an Approved Form Letter

Market: Federal/State/Local, House, Senate

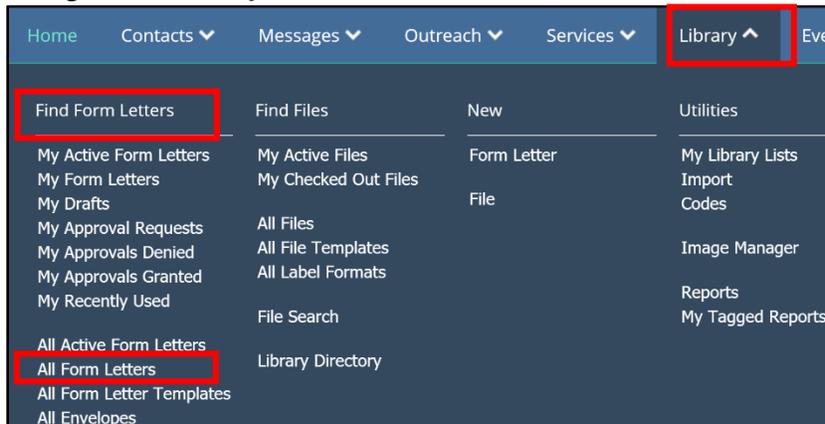
Module: Library

Purpose: This guide provides instruction on how to create a new version of an approved Form Letter.

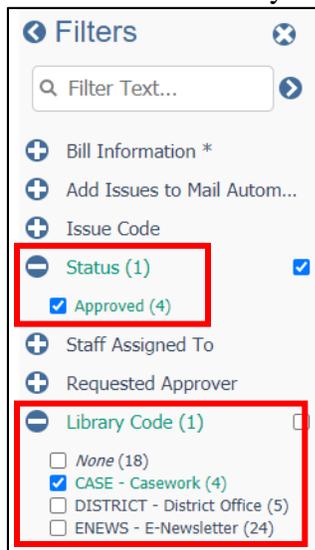
Key Benefits

Creating new versions of a Form Letter to accommodate the modifications needed to properly respond to messages.

1. Navigate to **Library > Find Form Letters > All Form Letters**.



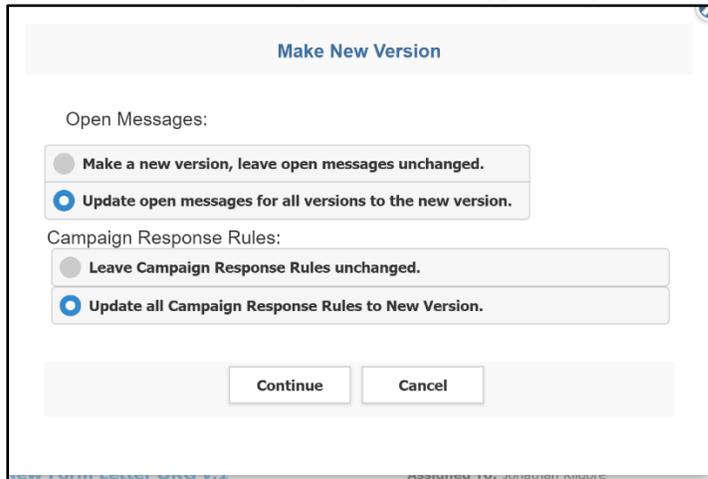
2. The results display a list of your office's Form Letters. A best practice is to use the **Status** and **Library Code** as a filters for your search.



3. Find the Form Letter. Select **+Version**.



4. The following window will only appear if you are creating a new version of a Form Letter that is currently applied to open messages and/or campaigns. Otherwise, clicking **+Version** will immediately create a new version of your Form Letter, which can then be approved or routed for approval. Contact your IQ Consultant on your office’s approval process of Form Letters.



Open Messages

- *Make a new version, leave open messages unchanged:* Select this option to continue routing the approval of the new version. Any open messages that are using the existing version of the Form Letter will not be affected.
- *Update open messages for all versions to the new version:* Select this option to continue routing the approval of the new version. Once approved, the new version of the Form Letter will be applied to the open messages where it is assigned.

Campaign Response Rules

- *Leave Campaign Response Rules unchanged:* Select this option to use the existing version of the Form Letter that is currently applied in a set of campaign rules.
- *Update all Campaign Response Rules to New Version:* Select this option to apply the newly approved version of a Form Letter in a set of campaign rules.

5. Select **Continue**.