How to Route Form Letters for Approval

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| **Market:** Federal/State/Local, House, Senate |
| **Module:** Library, Messages, Home |
| **Purpose:** This guide provides instruction on routing Form Letters for approval in IQ. |
| **Key Benefits** |
| Form Letters are customizable letters that you can use/reuse to respond to volume of messages that are similar in nature; thus, reducing the need to create a new response to individual messages that are similar in nature. When created, these Form Letters can be sent for approval from one or more IQ users in your office, ensuring the quality of the Form Letter. The same process can be applied to Messages being sent to constituents. |

1. Navigate to **Library > New > Form Letter.**
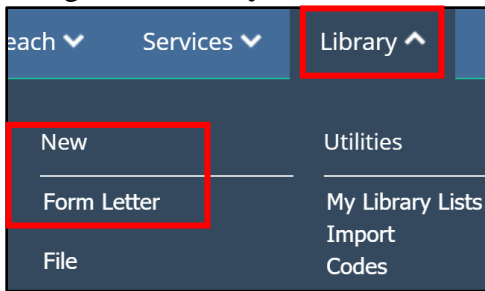
2. Follow the steps for creating a New Form Letter found in the *Create a New Form Letter Quick Reference Guide.*

3. Change the **Status** of the Form Letter from **Draft** to **Request Approval**. Then select your Form Letter Approver. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages, campaigns, and bills while awaiting approval. Once the Form Letter is approved, you will be able to send the message with the approved Form Letter.
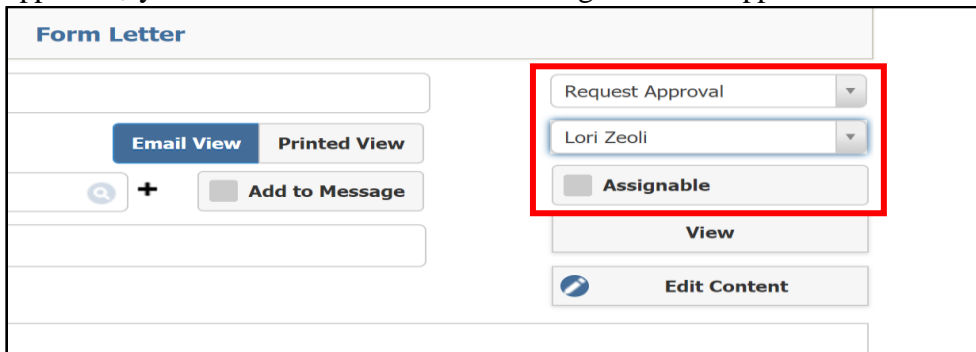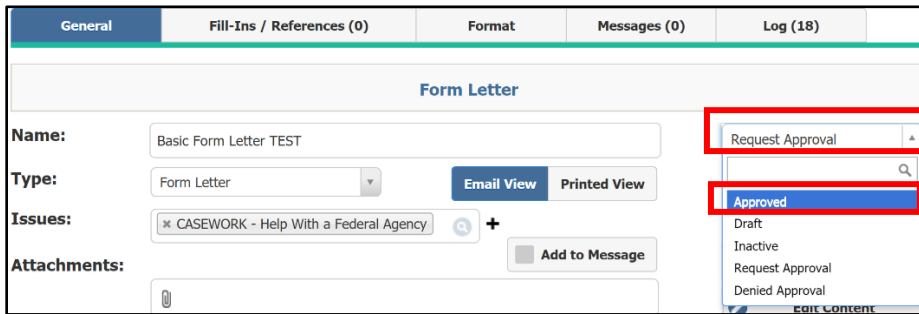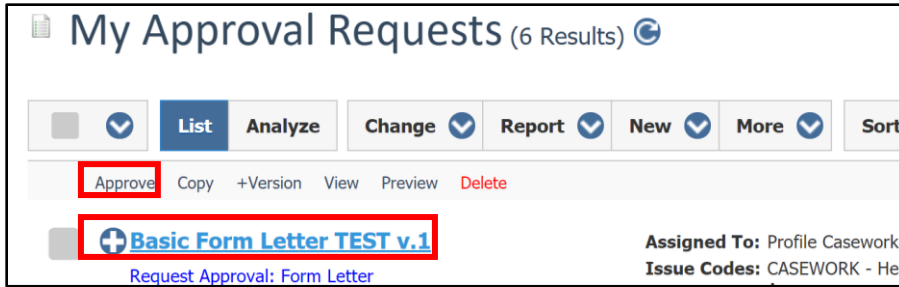
4. Click **Save**.
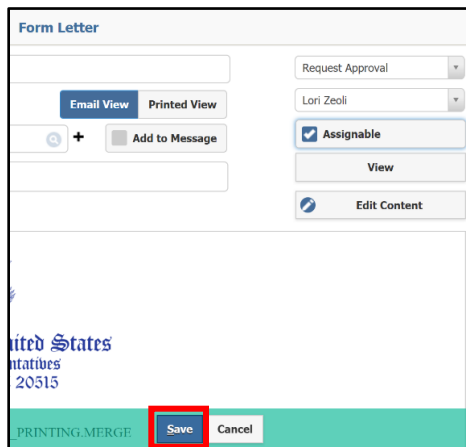
5. The Approval request can now be seen from the Approvers Home Page if they have the **My Work Summary** tile.
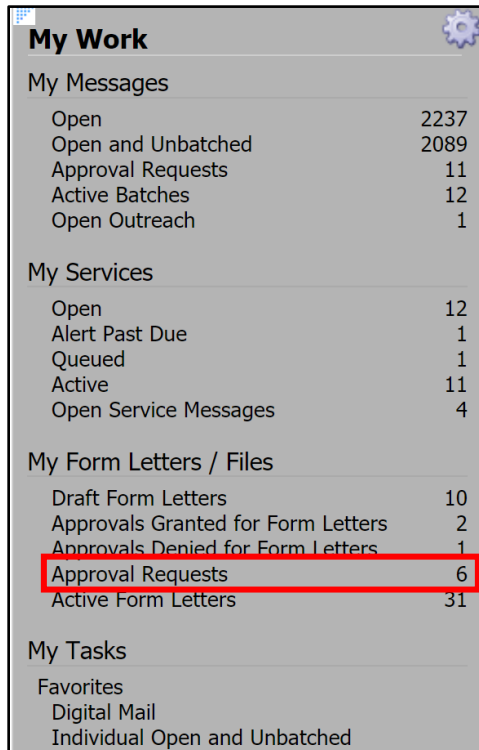
6. Select your Approval Requests to view and approve the Form Letters or Request approval from the next user in your office if necessary.

7. When a Form Letter is Approved or Denied you can see it from your My Work Summary Home page tile as well as from the Library module.

Figure 1: Home Tile

Figure 2: Library Module

8. To request approval for a Message record, change the status from **On Hold** to **Request Approval.** Your approver will be able to access these request from their My Work Summary Home Page tile.

9. Select the message individually to approve or select several at once and approve them by selecting **Change, Data, Change Status, Change all Selected Mail to Approved**.