

**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](mailto:helpdesk_iq@scc.senate.gov)

General Support Email:  
[support@IQservicedesk.com](mailto: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](http://www.intranetquorum.com)

**Document Revision Date:**

March 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**