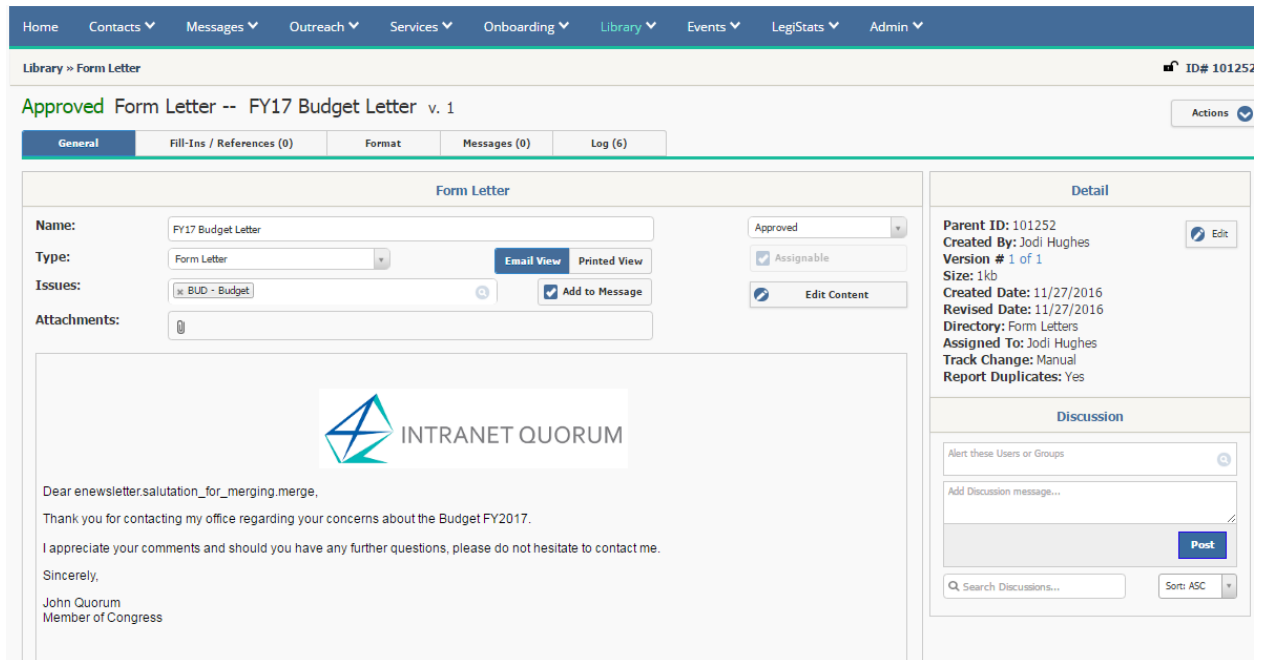


How to Create a Form Letter

1. Go to the **Library** Big Menu and under the **New** column, select **Form Letter**.
2. Type the name of the form letter in the **New Form Letter Name** field.
3. For the **Directory** field, use the default or select another one using the drop-down list.
4. **Select a Format**. Use the default format or select a different one by choosing from the list.
5. Click the **Add** button. (*IQ will open the Form Letter Library record*)
6. Enter the Issue Code(s) and choose from the existing list.
7. Check the **Add to Message** check box to ensure the issue is tracked in correspondence.
8. Click the **Edit Content** button.
9. In the editing window, type the body of the letter.
10. Click the **Save** button.
11. Change the status from **Draft** to **Approved**.



Home Contacts Messages Outreach Services Onboarding Library Events LegiStats Admin

Library » Form Letter ID# 101252

Approved Form Letter -- FY17 Budget Letter v. 1 Actions

General Fill-Ins / References (0) Format Messages (0) Log (6)

Form Letter

Name: FY17 Budget Letter Approved

Type: Form Letter Email View Printed View

Issues: BUD - Budget Add to Message

Attachments:

INTRANET QUORUM

Dear newsletter.salutation_for_merging.merge,
 Thank you for contacting my office regarding your concerns about the Budget FY2017.
 I appreciate your comments and should you have any further questions, please do not hesitate to contact me.
 Sincerely,
 John Quorum
 Member of Congress

Detail

Parent ID: 101252
 Created By: Jodi Hughes
 Version # 1 of 1
 Size: 1kb
 Created Date: 11/27/2016
 Revised Date: 11/27/2016
 Directory: Form Letters
 Assigned To: Jodi Hughes
 Track Change: Manual
 Report Duplicates: Yes

Discussion

Alert these Users or Groups

Add Discussion message...

Post

Search Discussions... Sort: ASC

*Form Letters with a status of Approved will be available to assign in Message records. To make a letter available even though it is not Approved, check the **Assignable** box in the Library record page.*

How to Search for a Form Letter by Letter Name:

1. In the **Library** Big Menu, select **All Form Letters** in the **Find Form Letters** column.
2. In the **Filter Text...** field type the Letter Name or Content text and press Enter.
3. Click the **Plus** icon to expand the content of a Form Letter or click the **Gear** settings icon and select **Expand All Rows**.
4. To change the sort order, select the **Sort** button. **Note:** The default sort order is **Created Date (Desc)** (which is most recent first), but can be changed to **Document ID, Document Name, Pending Message Count, Revised Date or Total Message Count**.

Editing a Form Letter:

When the text of a standard Form Letter must be changed, you can make a new version of that letter while retaining the original letter and all references to it in Message records.

Setting the Status of a new version to *Approved* automatically changes the previous version(s) to *Inactive*. You can make as many versions of a letter as necessary to keep the letter current.

Make a New Version of a Form Letter:

1. In the **Library** Big Menu, type the name of the existing Form Letter in the Quick Search field.
2. Click the Form Letter name in the drop-down list to open the Library record.
3. In the Form Letter record page, open the **Actions** drop-down menu and select **New Version**.
4. If there are any open Messages (and/or Campaign Response Rules) with the older version of the Form Letter, then select either **“Make a new version, leave open messages unchanged”** or **“Update messages for all versions, to the new version”**.
5. Click the **Continue** button. (*IQ creates the new form letter and opens the Library record*)
6. Click the **Edit Content** button to make any updates to the letter and click the **Save** button.
7. Change the *Status* to **Approved**.