

How to Manage Batches

Find and Respond to Messages That Have Been Batched:

1. In the **Messages** Big Menu, select **All Active Batches** in the **Utilities** column.
2. Scroll or use the *Text Filter* to find the batch name.
3. Click on the Batch Name link to open the batch.
4. Select all of the Message records in the batch and open the **Change** drop-down menu and select **Data**.
5. Confirm the **Outgoing Method** is **Email**.
6. To check for duplicate letter responses in the batch, click in the **Change Status** field and select *Complete As Duplicate if Not As Earliest* or *Complete As Duplicate if Not Latest*.
7. If you are ready to send the response, click on the **Send Email** radio button in the **Next Action** field and click the **Save** button.
8. Select the **Send In** option (*Foreground Now, Background Now or Background Later*).
9. Click on the **Send Email** button.

Note: After all of the Message records in the Batch have a status of **Completed**, you should archive the batch by clicking the [Archive Status](#) link at the top of the Batch record or selecting the **Archive** in-row action in the List of Batches.

Find and Assign a Form Letter to Messages That Have Been Batched:

1. In the **Messages** Big Menu, select **All Active Batches** in the **Utilities** column.
2. Scroll or use the *Text Filter* to find the batch name.
3. Click on the Batch Name link to open the batch.
4. Select all of the Message records in the batch and open the **Change** drop-down menu and select **Data**.
5. Select the appropriate *Issue Code, Assigned To, and Form Letter* and confirm the **Outgoing Method** is **Email**.
6. To check for duplicate letter responses in the batch, click in the **Change Status** field and select *Complete As Duplicate if Not As Earliest* or *Complete As Duplicate if Not Latest*.
7. If you are ready to send the response, click on the **Send Email** radio button in the **Next Action** field and click the **Save** button.
8. Select the **Send In** option (*Foreground Now, Background Now or Background Later*).
9. Click on the **Send Email** button.

Note: After all of the Message records in the Batch have a status of **Completed**, you should archive the batch by clicking the [Archive Status](#) link at the top of the Batch record or the **Archive** in-row action in the List of Batches.