

Creating a Form Letter

Market: House, Senate

1. Navigate to **Library** → **+New** → **Form Letter**.
2. Enter the name for your new **Form Letter**. Select the library directory location to store the **Form Letter**. The default template will display in the Format field, but you can change it. A preview of the selected format will display. The email version is on the left and the printed version is on the right. Select **Create**.

Add Form Letter

Add Form Letter


Name

Directory

Form Letters

Format

Default Template - 12pt 1in



Congress of the United States
House of Representatives
Washington, DC

MAIL.DATE_ON_LETTER_FOR_

Dear enewsletter.salutation_for_merging.merge,

Mail.date_on_letter_for_printing.merge

Mail.name_based_on_salutation.merge

Mail.address.title.merge

Mail.address.org1.merge

Mail.address.org2.merge

Mail.address.addr1.merge

Mail.address.addr2.merge

Create

Close

3. The Draft **Form Letter** view will open. Click the **Edit** button.

All Form Letters Find

New Change Report More

Draft
 Form Letters
Test Form Letter JB v.1
 Created 10/31/2023
 Revised 10/31/2023

General Details Fill-Ins Format Discuss Log

Messages	All	Open	Closed
	0	0	0

Content Begins Here

Edit Approve

4. Complete the information in the **Draft Form Letter** window. Be sure to enter in the **Issue Code(s)** to associate with this Form Letter. Associating issue code(s) with a Form Letter is a best practice as it supports the effort to target your audience for outreach activities, services, etc. as well as for reporting.

Draft Form Letter


Letter Detail Format


Letter Name
 Sample Form Letter

BUD-Budget and Economy X

Issues

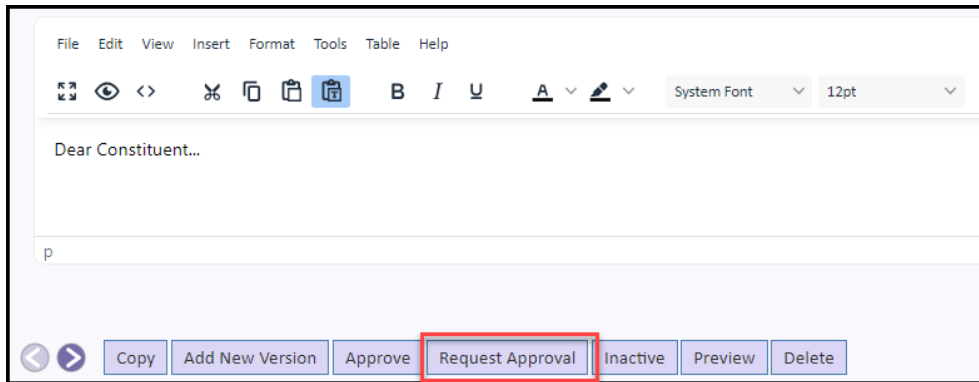
5. Select **Add to Message**. This will ensure that all correspondences that will use this Form Letter will include the issue code(s) you selected.

6. Add attachments as needed. Click the . Select file(s) from your computer or drag and drop the file(s) from your computer into the field. These attachments will automatically be included when this Form Letter is used. Click **Attach**.

7. Compose the content of the form letter in the editor window. You can make it full screen by clicking .

8. Click **Save**.

9. Click **Request Approval**. Then select your Form Letter Approver and click **Update**. Check the **Assignable** box after choosing your approver. This will ensure you can assign the Form Letter to messages while awaiting approval. Once the **Form Letter** is approved, you will be able to send the message with the approved **Form Letter**.



10. Click **Save**.

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