Sending a Message via a Service Record

Market: House, Senate

Description: Within the Services module, users can email and respond to the constituents via Form Letter or a customized response. These instructions teach users how to create and send these messages.

A best practice when responding to a constituent associated with a service record is to first attach a contact record to the service record first prior to sending an email.

Sending a Message

1. Open an active service record.

2. Select the envelope icon next to the Primary or Other Contacts.

3. Select the option to respond to the constituent.
    a. **Option - Form Letter**
        i. Complete all necessary fields.
        ii. At the Form Letter field, click into the field and select a Form Letter from the dropdown list.
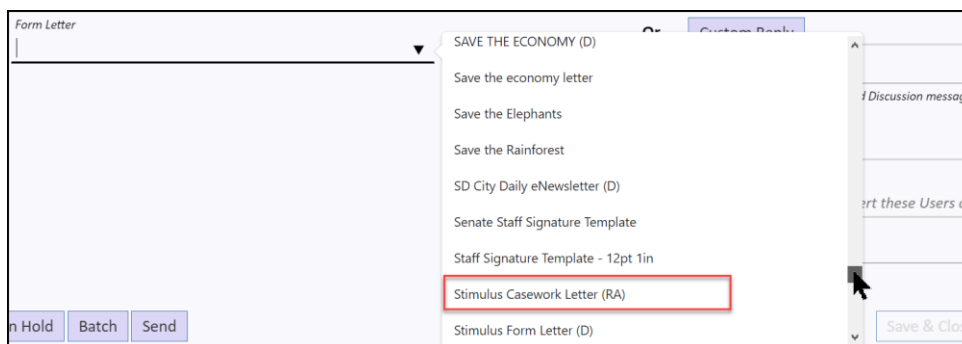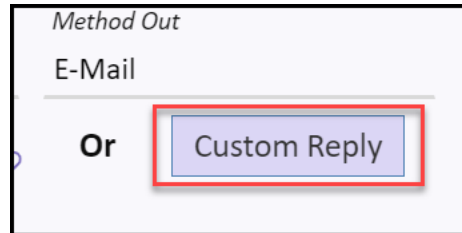

        iii. Select **Send.** (If you customize a form letter, you may need approval to send the form letter. If so, select **Request Approval** and identify the name of the
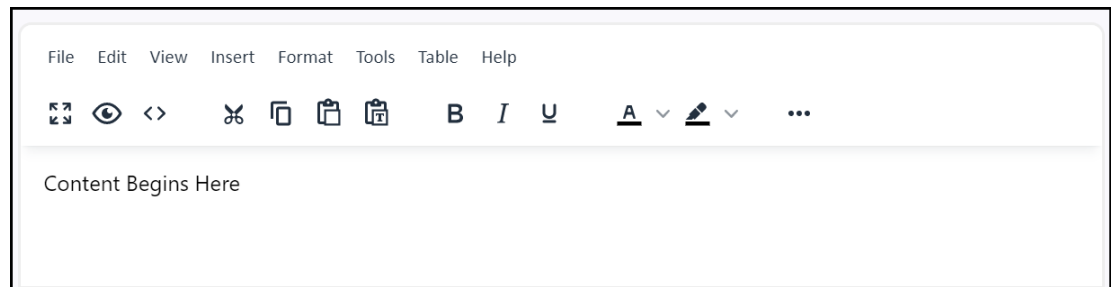
approver. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

b. **Option - Custom Reply**
   i. Click the **Custom Reply** button.

   ii. Use the content editor to type the custom reply. (To utilize the full screen option for the editor, click the [⤢]).

   iii. Select **Send.** (You may need approval for the custom reply. If so, select **Request Approval** and identify the name of the **approver**. This will alert the selected individual to approve the letter. Contact your IQ Consultant on the approval process of documents for your office.)

Sending a Quick Message

1. Click on **Add Message** next to **Activity** on the right-hand side of your Service.
2. Fill in the fields and choose a **Form Letter** or write a **Custom Message** in the space below.
3. Choose **More Message Options** to see the full Message Sending screen.
4. Click **Send Email** to send the Message.

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