How to Use a Form Letter or Customized Response in a Service Record

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| **Market:** Federal/State/Local, House, Senate |
| **Module:** Services |
| **Purpose:** This guide provides instructions on how to use a Form Letter or a customized response within a service record. |
| **Key Benefits** |
| IQ provides the capability to respond to a constituent within a service record so that the user does not have to navigate to different section in IQ. By using a Form Letter, the user can respond using a consistent message to their constituents about a service. By using a customized response, the user can personalize the response as needed.

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

1. Open an active service record.

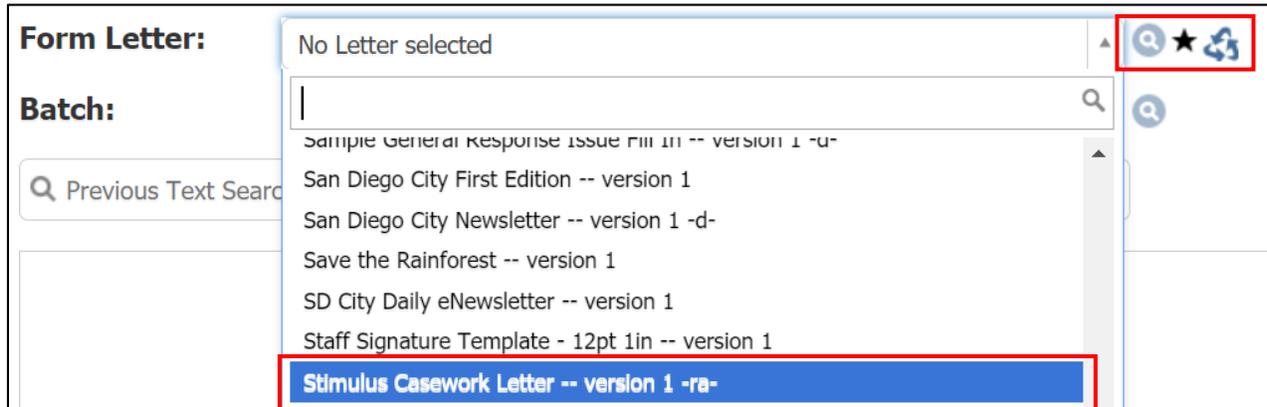2. Select the envelope icon next to the Primary or Other Contacts.
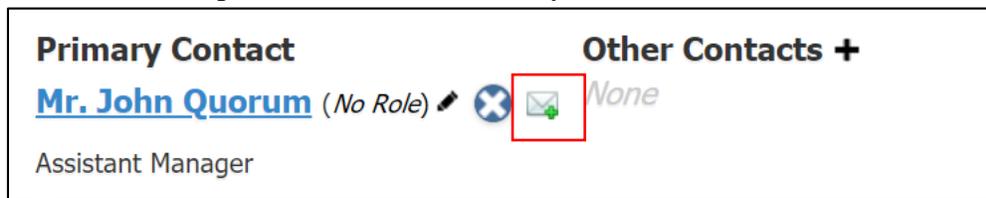
3. Select the option to respond to the constituent
   Option- Customize Response

   a. Click **Customize**.
   b. Modify the content of the response as needed.
   c. Click **Save**.

Option- Form Letter

At the Form Letter field, use one of the options below to select a form letter.

    a. *Drop down list:* select a Form Letter from the dropdown list.

    b. *Magnifying Glass:* select a Form Letter using advanced search.

    c. *Star*: if you have a template that is set as the default template used for a particular service, click this icon.

    d. *Recycling*: select a Form Letter that was previously used.

4. Select **Approve > Send.**

> **Note**: If you need approval for the Form Letter, 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.

5. Select **Save** (this option is only available for if the service record requires approval from another use).