

How to Create, Search, and Use Batches to Respond to Individual Messages

Market: Federal/State/Local, House, Senate

Module: Messages

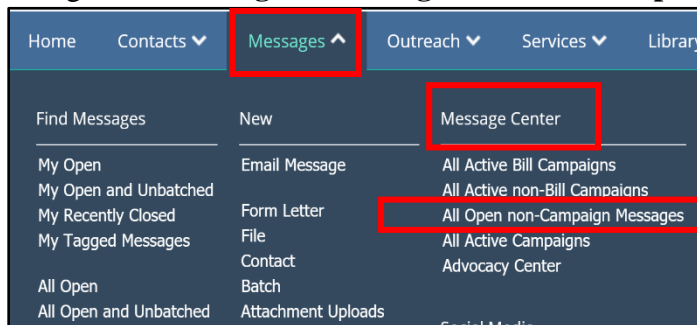
Purpose: This guide provides instruction on how to create and search a batch as well as how to respond to the individual messages in a batch.

Key Benefits

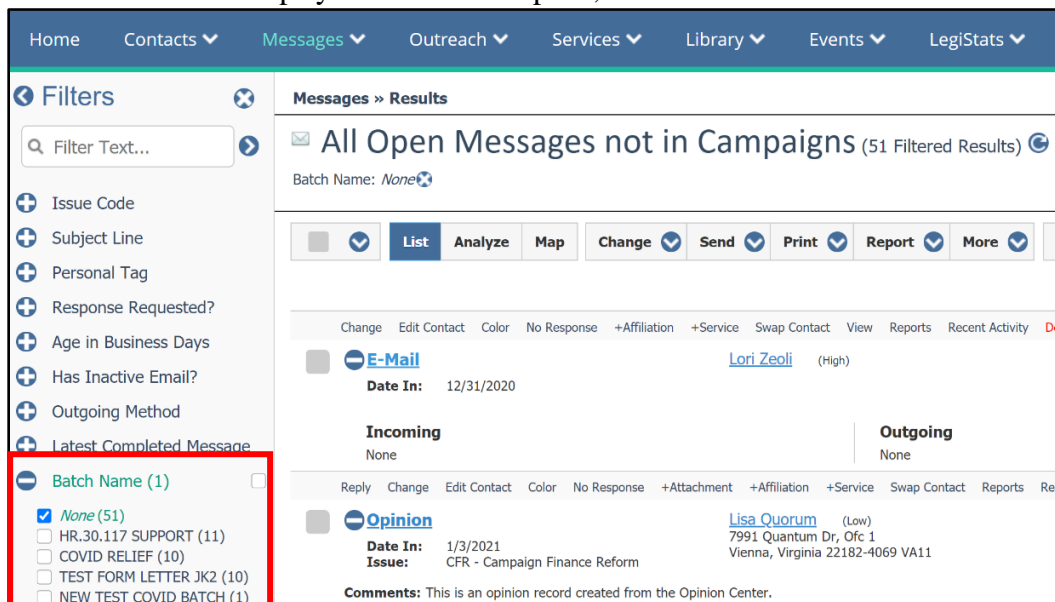
In IQ, “batching” refers to the process of putting similar messages into a virtual “bucket” so that you can respond to all these messages simultaneously. Typically, when a batch is created, a *Form Letter* is also created so that it can be used to respond to all the messages associated with the batch. Batches are most effective when applied to individual messages. These are messages that typically are not associated with a bill nor a campaign.

Creating a Batch

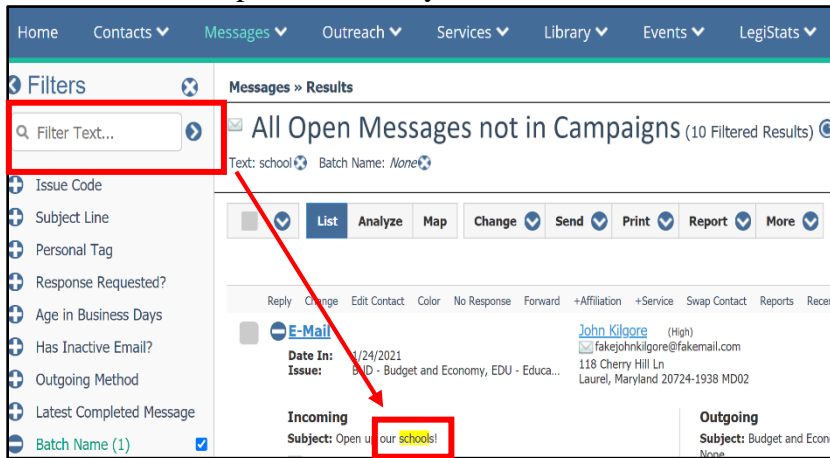
1. Navigate to **Messages > Message Center > All Open Non-Campaign Messages**



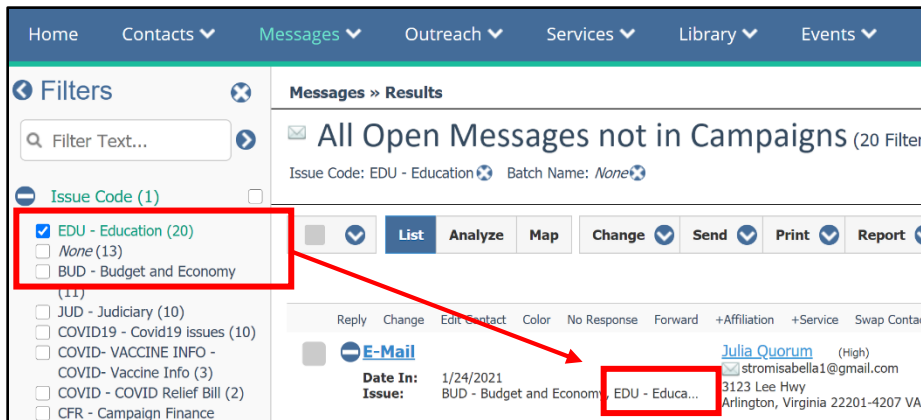
2. The search results display. In the Filters pane, select the **Batch Name: None**.



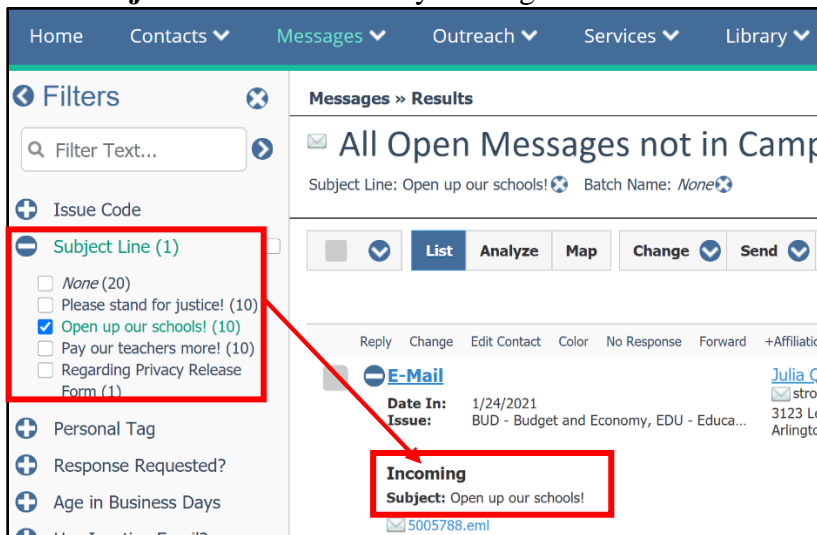
3. Use either **Filter Text**, **Issue Code**, or **Subject Line** to find records that have these items in common.
- a. The **Filter Text** option runs a keyword search.



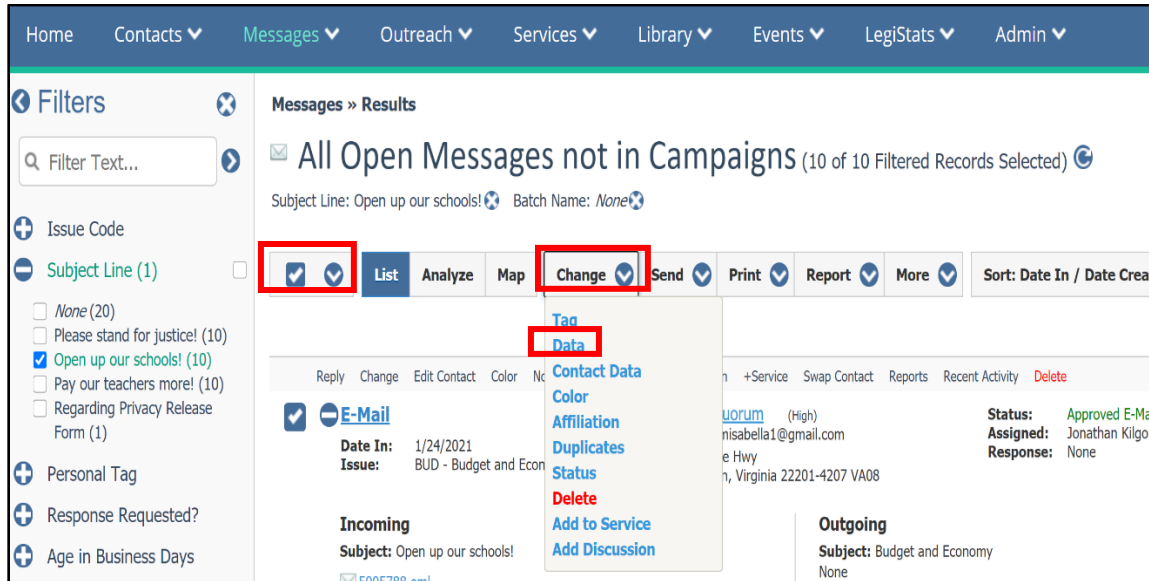
- b. The **Issue Code** filter allows you to sort by messages that have already been tagged with issue codes.



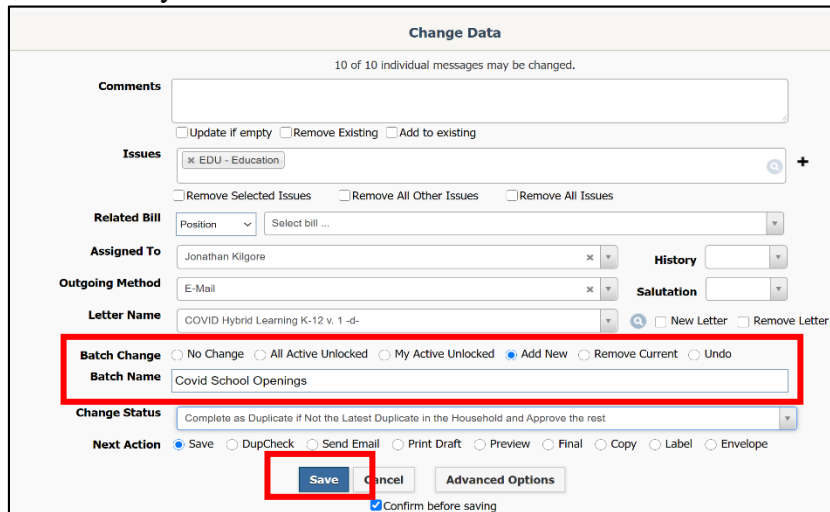
- c. The **Subject Line** filter sorts by messages with identical email subject lines.



- Click the box to select all the records. In IQ, this is the check box to the left of **List**. Select **Change > Data**.



- A best practice is to select **All Active Unlocked** before selecting **Add New** to determine if that batch name already exists. Select **Save**.



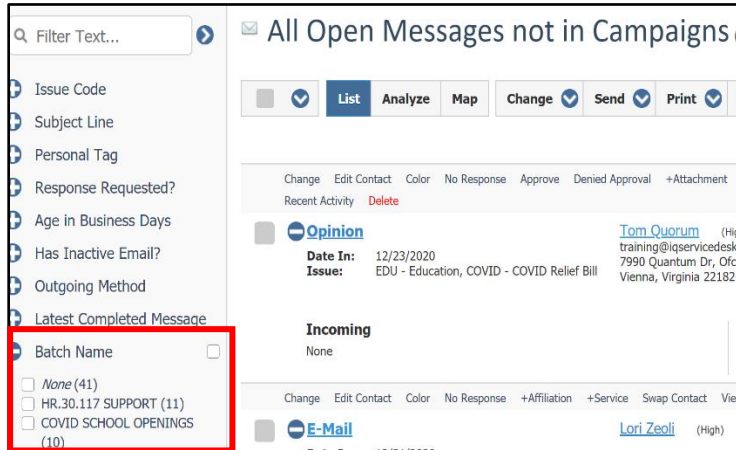
Searching for a Batch

1. There are 2 ways to find a batch.

Option 1- Filter

Navigate to **Messages > Message Center > All Open Non-Campaign Messages**.

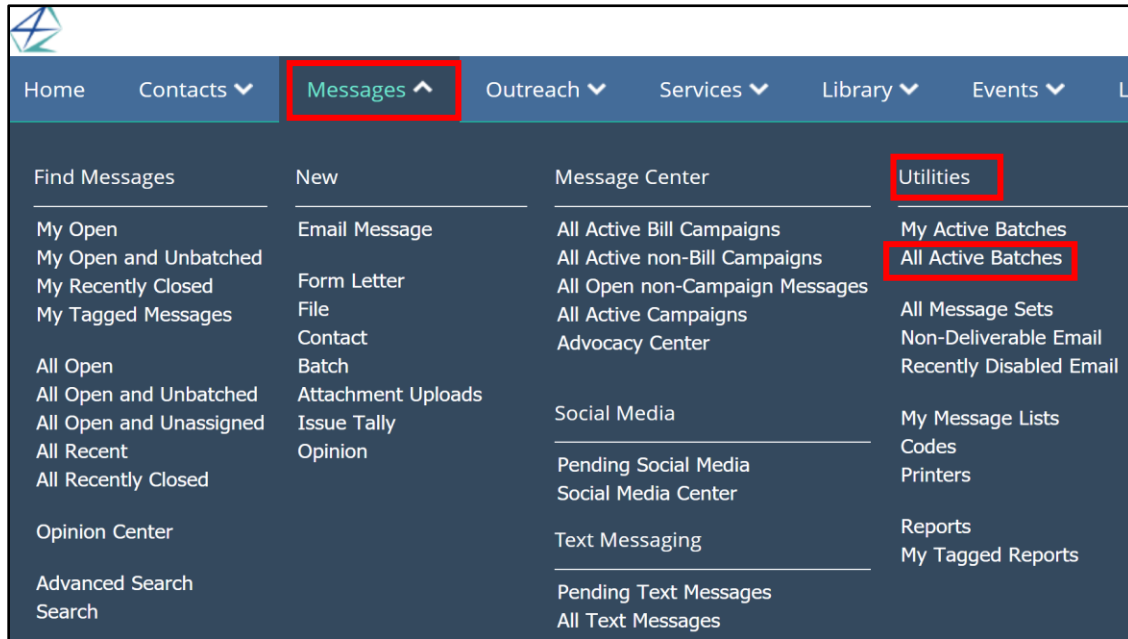
In the **Filter** pane, select **Batch Name** and click the batch name.



Option 2- Messages Module

Navigate to **Messages > Utilities > All Active Batches**

Click the link of the batch name.



Responding to Messages within a Batch

1. After a batch has been selected, select all the messages in that batch.
2. Select **Send > Email and Print Final**.

The screenshot shows the 'Messages >> Results' page in the Intranet Quorum system. The top navigation bar includes 'Home', 'Contacts', 'Messages', 'Outreach', 'Services', 'Library', 'Events', and 'LegiStats'. On the left, a 'Filters' sidebar is visible with various filter options. The main content area displays a batch of messages titled 'All Open Messages not in Campaigns (10 of 10 Filtered Records)' with a batch name of 'COVID SCHOOL OPENINGS'. A toolbar above the message list contains buttons for 'List', 'Analyze', 'Map', 'Change', 'Send', 'Print', 'Report', and 'More'. The 'Send' button is expanded, showing a dropdown menu with 'Email' and 'Email and Print Final' options. The 'Email and Print Final' option is highlighted with a red box. Below the toolbar, a message is displayed with details such as 'Date In: 1/24/2021', 'Issue: BUD - Budget and Economy, EDU - Educa...', and 'Subject: Open up our schools!'. The message is categorized as 'Incoming' and 'Outgoing'.

The illustration below provides best practices on managing messages from a macro and micro level approach in IQ.

First, manage bill-related messages as this will allow you to also manage all the campaigns associated with a bill. Thus, you are reducing the number of campaign messages (which tend to have the highest volume of message records in IQ) at the same time.

Second, manage campaign messages by combining those that are similar in nature. Thus, you are reducing the number of campaigns to manage and to respond.

Finally, manage individual messages as these are the type of messages that have lower volume of records in IQ.

