Creating and Publishing an IQ Survey

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to create a new survey in IQ5. Note that the new survey will be created using the default survey template selected in IQ4. Talk to your IQ Consultant for more information on editing the Survey template your surveys will be created from.

- 1. Navigate to **Outreach** → **Surveys** → **All Surveys** → +**New**: **Survey**.
 - a. *Note: You may need to click the 🖾 symbol to see your new survey for editing.



2. Click **Edit** on your new survey.

=		All Surveys V Find		Filter Result							() ()
ይ"	÷	🕀 Now 🗸 Change 🗸 Rep	ort V More V								Row 1 - ID 100178
Π	ŦΑ	All Surveys (Total 70)	63					By Date Created (Desc) V	+		🖻 🔀
Q		Name	Status	Owner	Created	Modified	Embed		Draft		
1	 #1	Survey 100178	Draft		10/3/2024	10/3/2024	Link		Survey 100 Created 10/3/202 Modified 10/3/20	4	
•	 12	Survey_100176	Draft	11,000	9/13/2024	9/13/2024	Embedded		Owner	Intelligent Pagest	
2+	 #3	Survey_100175	Draft		9/12/2024	9/12/2024	Embedded		Embed Type Redirect	Link No redirect	
0	 #4	Survey_100174	Draft	In the Tapes	9/12/2024	9/12/2024	Embedded		Preview:	Congressman X0000K	
2	#5	Survey 100171	Draft		9/6/2024	9/6/2024	Embedded				
22	 #6	Survey 100170	Draft	In the Spec	9/6/2024	9/6/2024	Embedded				
2 2	#7	Survey 100169	Draft	In section Topos	9/6/2024	9/6/2024	Embedded				
		Survey 100168	Draft	In street Sugar	9/6/2024	9/6/2024	Embedded				
	 #9	Survey 100167	Draft		9/4/2024	9/6/2024	Embedded				
	 #10	Survey 100166	Draft	To be set of	8/9/2024	8/9/2024	Embedded		Edit Publish	View instapoll	0

3. The editing window for the Survey now displays. Edit the **Name, Owner, and Description** fields on the left hand side.

- 4. Select the Embed Format that is best for the delivery of the Survey, along with the Link Text Style color, size and text. Optionally, choose an Affiliation Code to add/remove to Constituents who take the Survey.
- Begin adding questions to your survey. There are several Formats to select once you click the + icon:

No fields are defined. Click below to add one.		
	Ð	

a. Text Block: Used to place instructional text or titles of different areas in the Survey.

Add Field	×
Label Fall 2024 Survey	I
Appearance Answer Type Text block	
	Save Cancel

b. Checkboxes: allow multiple responses or options to be selected. Lower and Upper Limit options are available with Checkbox questions. Upper and lower limits allow you to select options that range from the three most important (i.e. 1-3 answers are allowed). If a question is marked as required and lower/upper limits are not populated, at least one response is required.

Edit Field		×
Label Checkbox Test Questic	'n	
	Blue	⊕Add affiliation
ned 🗈	Red	⊕ Add affiliation
🛅 🗘 Green	Green	⊕ Add affiliation
Add Another Answer	wer	
Required	Upper Limit 2	
Add "Other" An	swer	
Appearance Answer Type Checkboxes (multi v	Columns Direction value) value 1 v Horizontal v	Arrangement Question over answer ∽
Delete		Save Cancel

c. Radio Buttons: allow a single response from a set of fields.

Add Field		×
Label Radio Button Tes	t Question	I
in ↓ 1	1	Add affiliation
1 1 2	2	⊕Add affiliation
â 🗘 3	3	⊕ Add affiliation
⊕ Add Anothe	r Answer	
Required		
Add "Other	r" Answer	
Appearance-		
Answer Type Radio buttons	(single value) × Columns Direction 1 × Horizontal ×	Arrangement Question over answer ∽
		Save Cancel

- d. **Dropdowns:** allow a single response from a set of values displayed in a list box.
 - i. *Note*: For checkboxes, radio buttons, and dropdowns you can add/remove affiliations for responses as shown below.

Add Field		×			
^{Label} Dropdown Test Qi	uestion	1			
Placeholder Text Placeholder Text					
1	Answer 1	⊕ Add affiliation			
â 2	Answer 2	Add affiliation			
	Answer 3	⊕ Add affiliation	+~	EMAIL.OPTINNew	Θ
⊕ Add Another	Answer				affiliation
Required			- ~	EMAIL.OPTINNew	Θ
Answer Type Dropdown (sin	gle value) × Question over answer ×		+~	EMAIL.OPTOUTUI	Θ
		Save Cancel		🕀 Add	affiliation

e. Text Box: allows response to be typed in a text box.

laceholder Text		
lacenolaer lext Placeholder Text		
Required		
-Appearance		
Answer Type Rows Arrangement Text box (freeform value) 2 Question over answer		
	Save	Cance

6. Enter the Question and each Answer to include in the survey. If you select an Affiliation Code(s) to associate with one or more answer, that Affiliation Code(s) will be applied/removed to/from the Contact Record when the survey is submitted.

Edit Field				`
Label				
Radio Button Test Que	stion			
		_		
m ↓ 1	1	+ ~	EMAIL.OPTINNew	Θ
		+	⊕Ad	d affiliation
	2) ⊕ Ad	d affiliation

- 7. Select the **Required** checkbox to indicate a response is required.
- 8. Select Add an "Other" Answer option to add an optional field to further clarify a response.

³ ³		\oplus Add affiliation
• Add Another Answer		
🗹 Required		
✓ Add "Other" Answer	^{Placeholder} Other	

Example Survey:

Fall 2024 Survey		
Checkbox Test Question		
Blue Red		
Green		
Radio Button Test Questi	on	
<u> </u>		
<u> </u>		
O 3 O Other		
Dropdown Test Question		
		~
	ype out your answer below	

- 9. At the top right of the page, click Save.
- **10.** Click **Publish**, then select whether to publish as a **standalone web form** that can be sent to constituents or to **start an outreach mailing based on the content of this survey.**