# 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.
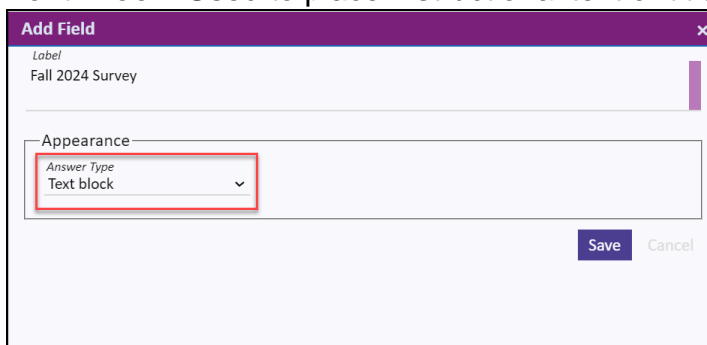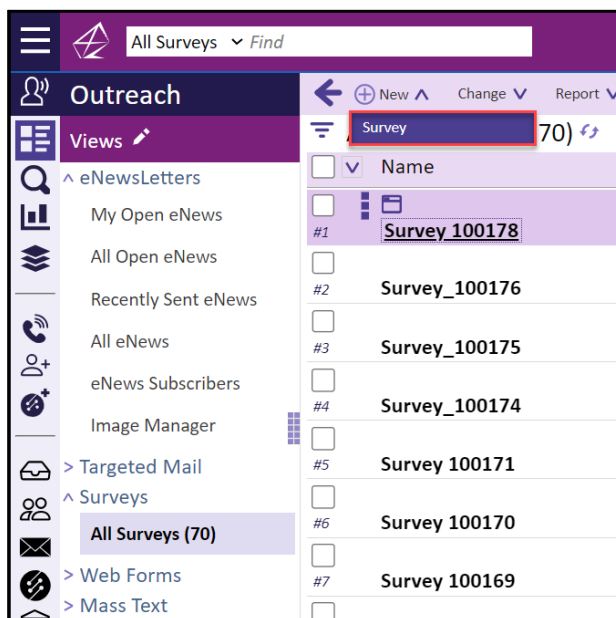

2. Click **Edit** on your new survey.
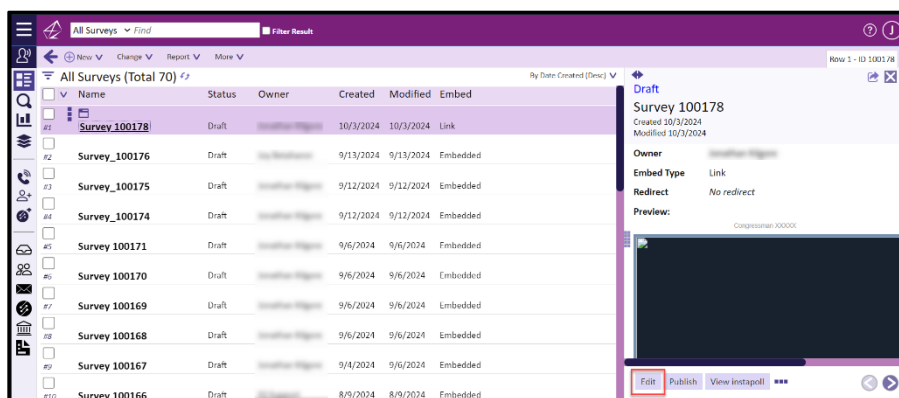
3. The editing window for the Survey now displays. Edit the **Name, Owner, and Description** fields on the left hand side.

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.

5. Begin adding questions to your survey. There are several Formats to select once you click the **+** icon:

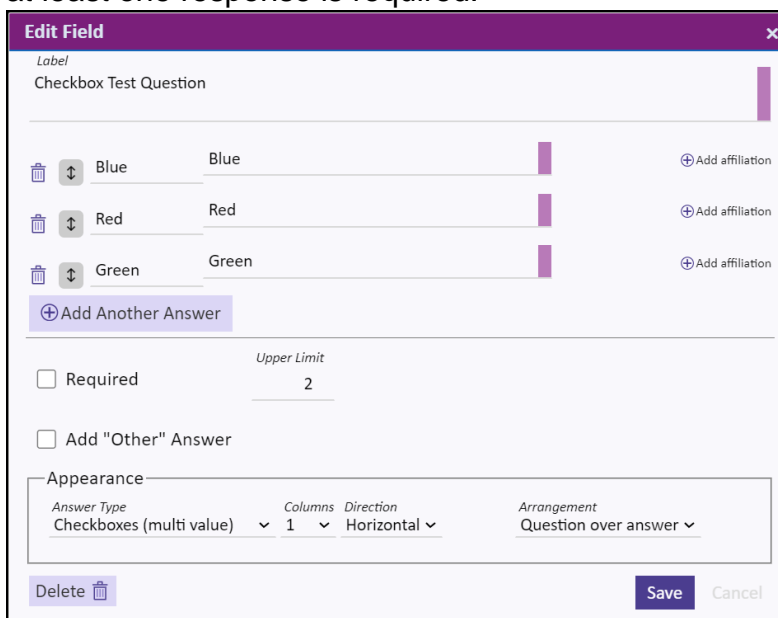No fields are defined. Click below to add one.

⊕

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

Add Field ×

Label
Fall 2024 Survey

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 Question

🗑 ↕ Blue   Blue   ⊕Add affiliation

🗑 ↕ Red   Red   ⊕Add affiliation

🗑 ↕ Green   Green   ⊕Add affiliation

⊕ Add Another Answer

☐ Required   Upper Limit
                2

☐ Add "Other" Answer

Appearance
Answer Type   Columns Direction   Arrangement
Checkboxes (multi value) ⌄   1   ⌄   Horizontal ⌄   Question over answer ⌄

Delete 🗑   Save   Cancel

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

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.

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

Add Field   ×

Label
Text Box Test Question: Type out your answer below

Placeholder Text
Placeholder Text

☐ Required

Appearance
Answer Type   Rows   Arrangement
Text box (freeform value) ∨   2 ∨   Question over answer ∨

Save   Cancel

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 Question

🗑 ↕ 1   1   + ∨ EMAIL.OPTIN--New ⊖
                                                            +   ⊕ Add affiliation
🗑 ↕ 2   2   −   ⊕ Add 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   ⊕ Add affiliation

⊕ Add Another Answer

☑ Required
                              Placeholder
☑ Add "Other" Answer   Other

Example Survey:

Fall 2024 Survey

Checkbox Test Question

- ☐ Blue
- ☐ Red
- ☐ Green

Radio Button Test Question

- ○ 1
- ○ 2
- ○ 3
- ○ [Other]

Dropdown Test Question

[⌄]

Text Box Test Question: Type 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.**