

## Creating and Publishing an IQ Web Form

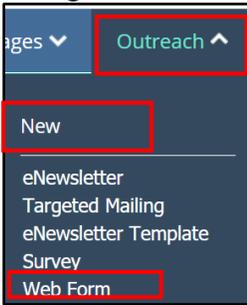
**Market:** Federal/State/Local, House, Senate

**Description:** IQ Web Forms are forms that can be customized and added to a Member’s website. This feature is helpful when soliciting information from constituents whose contact record is currently not in IQ (i.e., they are referred to as *anonymous* contacts). IQ Web Forms can be added to a Member’s website to capture information that will be stored as records in IQ. Examples of Web Forms include sign-in forms, internship applications, military academy nominations, schedule requests, and meeting minutes.

These instructions teach users how to create and publish IQ Web Forms.

### Setting up Basic Web Form Information

1. Navigate to **Outreach > New > Webform**



2. The **IQ Webform Wizard** is displayed on the screen and defaults to **Setup**. A sample web form is displayed.



3. Complete the following fields.

- a. **Name:** captures the name of the form.
- b. **Description:** refers to purpose of web form.
- c. **IP Access Restrictions:** lists of IP addresses that are not authorized to access the Webform.
- d. **Owner:** defines permissions on who can and cannot edit the web form
- e. **This form will be sent to:** refers to whose email account will be receiving this web form.
- f. **When submitted this form will create:** refers to the type of record to create.

## Building the Webform Content

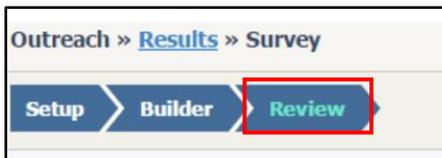
1. Select **Builder**.



2. Select the format of the web form field and choose the appropriate fields to display.  
*Note: these fields may vary depending on what type of web form you are creating.*
3. Select **Save**.

## Reviewing Webform Content

1. Select **Review** from the menu.



2. Review the information.

3. Select **Save** at the top right-hand corner of the module.

## Publishing a Webform

1. Select **Publish** top right-hand corner of the module.



2. Select **Publish**. The web form is published and ready to be included in web pages, emails, and eNewsletter.

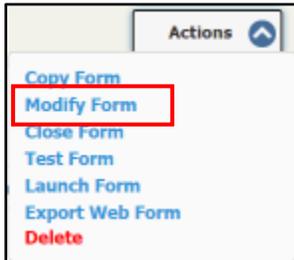
**Note:** If IQ captures any entry errors while trying to publish the Survey, the dialog will remain open with the list of errors.

## Creating a recurring Webform

1. After publishing the web form copy the link in the **Share this eform** field.



2. Click the **Actions** drop down menu in the top right and select **Modify Form**.



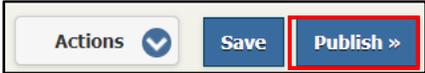
3. When prompted select **Submit**.



4. In the **Redirect to** field paste the copied link.

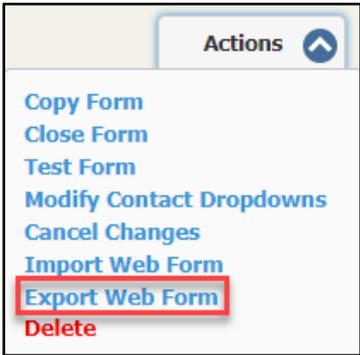
Redirect to:

3. Select **Publish** top right hand corner of the module.

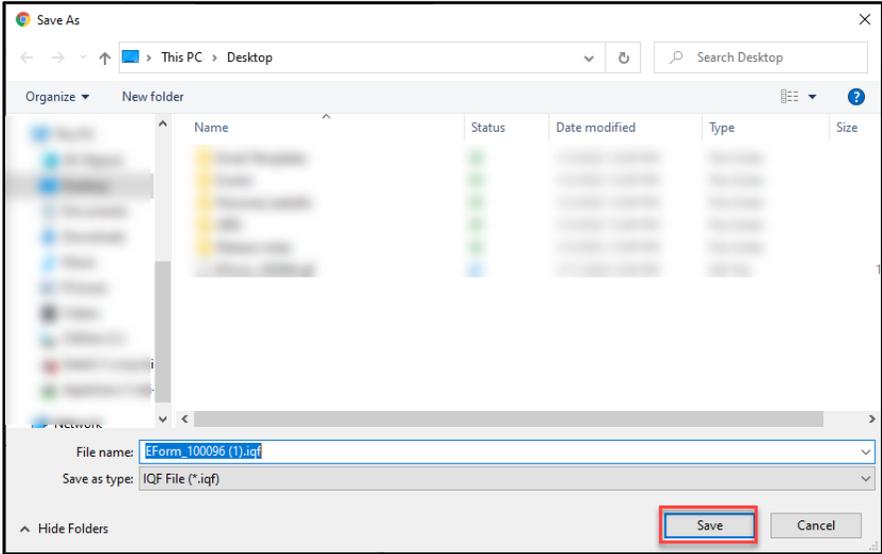


### Exporting a Webform

1. From within the webform click the **Actions** drop down menu in the top right and select **Export Webform**.

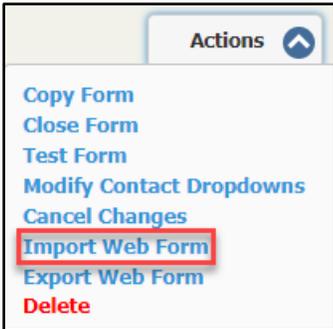


2. From the download file window click **Save**.

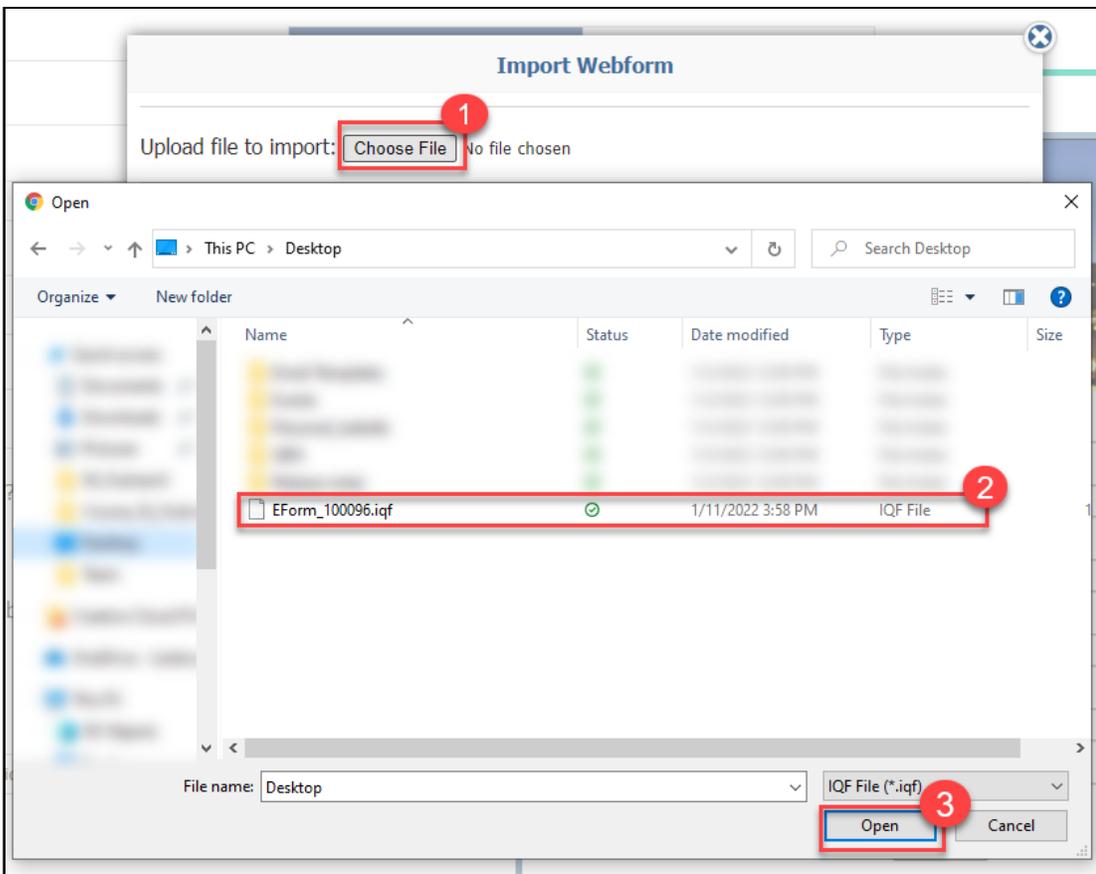


### Importing a Webform

1. From within the webform click the **Actions** drop down menu in the top right and select **Import Webform**.



2. In the Import Webform box select **Choose File**.
3. Select appropriate file and click **Open**.



4. Select the **Service to be created** from the drop down menu and click **Submit**.

**Import Webform**

This form requires the following information in order to import:

Service to be created: