

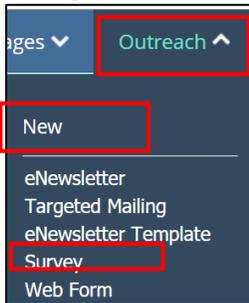
Creating and Publishing a Survey

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to create and send a survey in IQ.

Setting up Basic Survey Information

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



2. The **IQ Survey Wizard** is displayed on the screen and defaults to **Setup**. A sample survey is displayed.



3. Enter the survey **Name**, **Owner**, and **Description** in the appropriate fields. The default owner is set to the user who created the survey. Click **Save**.

A screenshot of the survey setup form. It contains three fields: 'Name' with the value 'Sample Survey', 'Owner' with a dropdown menu showing 'IQ Support', and 'Description' with the text 'This is a sample survey used for training.'.

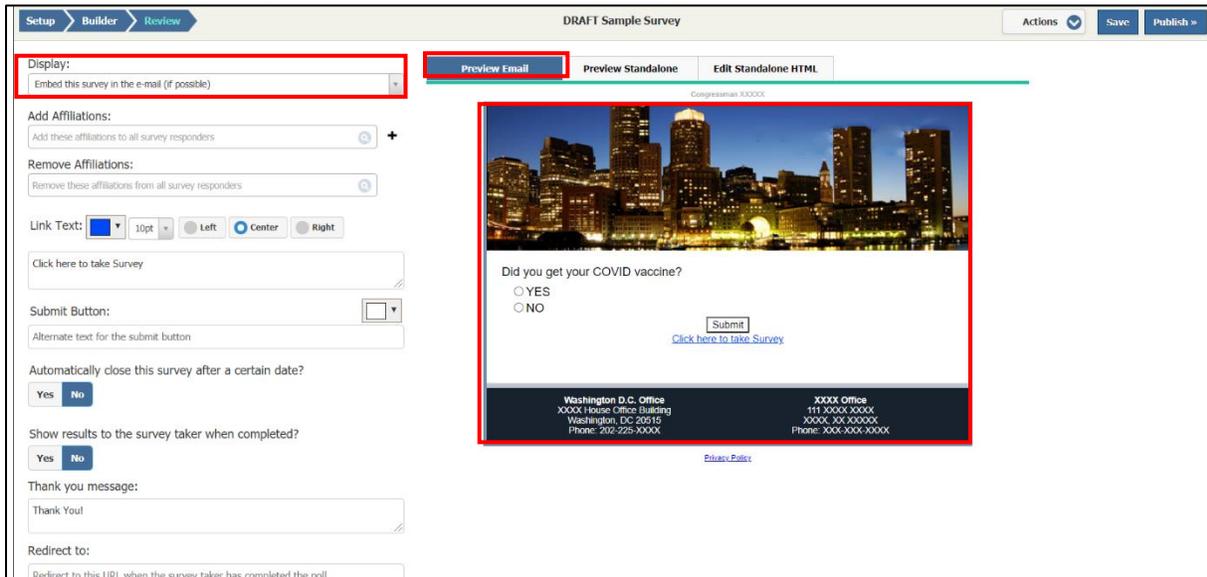
Building the Survey Content

1. Select **Builder**.



2. Select the format of the survey question.
 - a. **Text Block** allows a response to be typed in by the user in a text box format.
 - 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

2. Complete the fields to select the **Display** used for the survey:
 - a. **"Embed this survey in the e-mail (if possible)"** will allow recipients to complete and submit the Survey directly in the email itself.
 - b. **"Show a link in the e-mail that opens the survey in a new window"** will allow the recipient to select a hyperlink to open the survey.
 - c. **"Show an image of the survey that opens the survey in a new window"** will display the survey in the body of the email as an image. Selecting the survey image will launch the survey in a new window.
 - d. **"Show a custom image of the survey that opens the survey in a new window"** will display the survey in the body of the email as a custom image that you provide. Selecting the survey image will launch the survey in a new window.



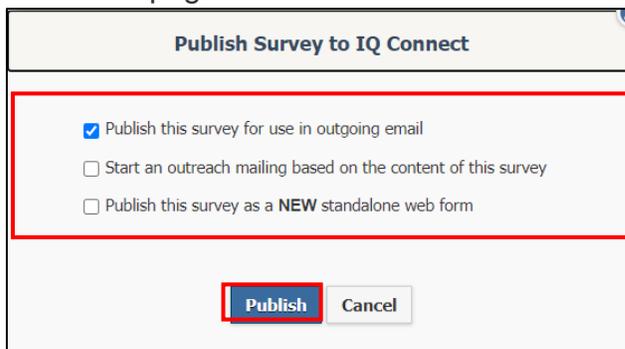
3. Select **Save** at the top right-hand corner of the module.

Publishing a Survey

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



2. Select an option from one of the selections in the dialogue box.
 - a. “**Publish this survey for use in outgoing email**” allows the survey to appear directly in the body of the email as text, a link, an object, or an image.
 - b. “**Start an outreach mailing based on the content of this survey**” allows only the survey to be delivered to constituents without an email message.
 - c. “**Publish this survey as a new standalone web form**” allows the survey to be accessible via a web page.



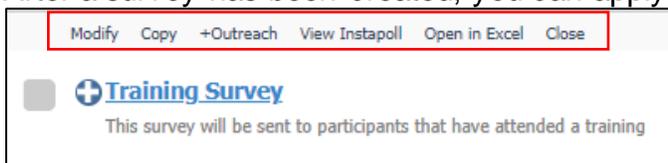
3. Select **Publish**. The survey is published and ready to be included in web pages, emails, and

Note: If IQ encounters any errors while trying to publish the Survey, the dialog will remain open with the list of errors that requires correction.

eNewsletters.

Using Survey In Row Actions

1. After a survey has been created, you can apply the following in-row actions towards the survey.



- a. **Modify:** This action is displayed for surveys that have been **published** or **closed**. It enables users to make changes to these surveys.

- b. **Publish:** This action is displayed for surveys that are in **Draft Status**. It enables users to make publish the survey. Once published, the status for the survey changes from **Draft** to **Published**.
- c. **Copy:** This action is displayed for surveys that are in **Draft, Published, or Closed** status. It enables users to make a copy of the survey.
- d. **+Outreach.** This action is displayed for surveys that have been **published**. It enables users to create an outreach material (e.g., eNewsletter) using the published survey.
- e. **View Instapoll:** This action is recommended for surveys that have been **published**. It enables users to view the survey questions and responses, if provided.
- f. **Open in Excel.** This action is displayed for surveys that have been **published and have survey responses**. It enables users to download and view the survey responses in Excel.
- g. **Close.** This action is displayed for surveys that are in **Draft or Published**. It enables users to set the status of the survey to **Close**.
- h. **Delete.** This action is displayed for surveys that are in **Draft or Published**. It enables users to delete the survey.