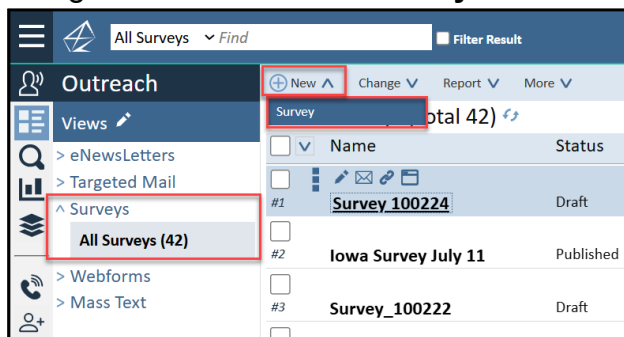


Creating and Publishing an IQ Survey

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**.



2. The editing window for the Survey now displays. Under **Setup**, edit the **Name**, **Owner**, and **Description** fields on the left-hand side.
3. 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.
4. Select Affiliation Codes to Add or Remove from Contacts who take the Survey as well as decide whether to automatically close the survey after a certain date and/or show results to the survey taker when completed.
5. Type a Thank you Message that the Survey taker will see once finished. Optionally, provide a Redirect URL to take the user to after Survey completion.

The screenshot shows the 'Survey Setup' interface with the 'Appearance' tab selected. The left sidebar contains various icons for navigation. The main content area includes the following fields and options:

- Name:** Survey 100224
- Owner:** 200 - Joy Betaharon
- Description:** (empty text area)
- Embed Format:** Show a link in the e-mail that opens the survey (dropdown menu)
- Link Text Style:**
 - Color:** (color picker)
 - Size:** 8pt (dropdown)
 - Alignment:** (dropdown)
- Text:** Click to open in a separate window
- Affiliation Codes:**
 - Add:** (dropdown menu)
 - Remove:** (dropdown menu)
- Automatically close after a certain date:** (toggle switch, currently off)
- Show results to the survey taker when completed:** (toggle switch, currently off)
- Thank you message:** Your response has been submitted, thank you.
- Redirect Url:** (text input field)

6. Click on the **Appearance** tab to change the Style of the Survey, along with other customization options. Take advantage of the various Preview options here as well.

The screenshot shows the 'Survey Setup' interface with the 'Appearance' tab selected. The left sidebar contains various icons for navigation. The main content area includes the following fields and options:

- Style:** Modern (dropdown)
- Separator:** (dropdown)
- Background Color:** (color picker)
- Questions:**
 - Color:** (color picker)
 - Size:** 10pt (dropdown)
 - Font:** (dropdown)
- Answers:**
 - Color:** (color picker)
 - Size:** 8pt (dropdown)
 - Font:** (dropdown)
- Submit Button:**
 - Color:** (color picker)
 - Text:** Submit
- Preview Email:** (button)
- Preview Standalone Page:** (button)
- Edit Standalone Page:** (button)
- Edit Instapoll Page:** (button)

7. Begin adding questions to your survey. There are several formats to select once you click the + icon:

Survey 100239

Save Publish »

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 2025 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.

Add Field

Label
Checkbox Test Question

Blue Blue Add affiliation

Red Red Add affiliation

Green Green Add affiliation

+ Add Another Answer

☐ Required Upper Limit
Upper L

☐ Add "Other" Answer

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

+ Additional Javascript Code (Standalone only)

Save Cancel

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

The 'Add Field' dialog box is titled 'Radio Button Test Question'. It features a 'Label' field with the text 'Radio Button Test Question'. Below this, there are three rows of answer options, each with a radio button icon, a number (1, 2, or 3), and an 'Add affiliation' button. A blue button labeled '+ Add Another Answer' is positioned below the answer rows. Underneath, there are two checkboxes: 'Required' and 'Add "Other" Answer'. The 'Appearance' section contains two dropdown menus: 'Answer Type' set to 'Radio buttons (single value)' and 'Arrangement' set to 'Question over answer'. At the bottom, there is a field for 'Additional Javascript Code (Standalone only)' and 'Save' and 'Cancel' buttons.

- 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.

The 'Add Field' dialog box is titled 'Radio Button Test Question' (though the content is for a dropdown). It features a 'Label' field with the text 'Radio Button Test Question'. Below this, there is a 'Placeholder Text' field with the text 'Placeholder Text'. There are three rows of answer options, each with a dropdown icon, a number (1, 2, or 3), and an 'Add affiliation' button. A blue button labeled '+ Add Another Answer' is positioned below the answer rows. Underneath, there are two checkboxes: 'Required' and 'Add "Other" Answer'. The 'Appearance' section contains two dropdown menus: 'Answer Type' set to 'Dropdown (single value)' and 'Arrangement' set to 'Question over answer'. At the bottom, there is a field for 'Additional Javascript Code (Standalone only)' and 'Save' and 'Cancel' buttons.

An inset window on the right shows the affiliation management interface. It has a red box around the '+ v' and '- v' buttons. Below these buttons, there are two rows of affiliations: 'EMAIL.OPTIN - New' and 'EMAIL.OPTOUT - U'. Each row has an 'Add affiliation' button and a minus button.

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

8. 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.

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

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

11. At the top right of the page, click **Save**.
12. 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**.