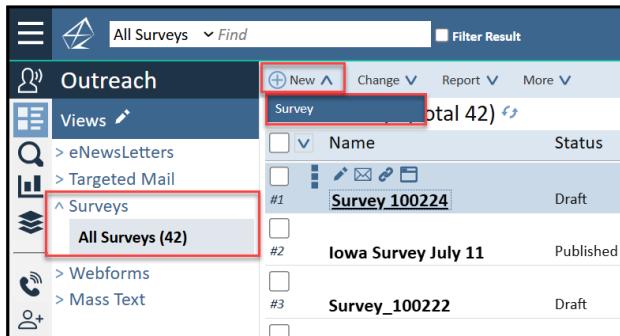


Creating and Publishing an IQ Survey

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.

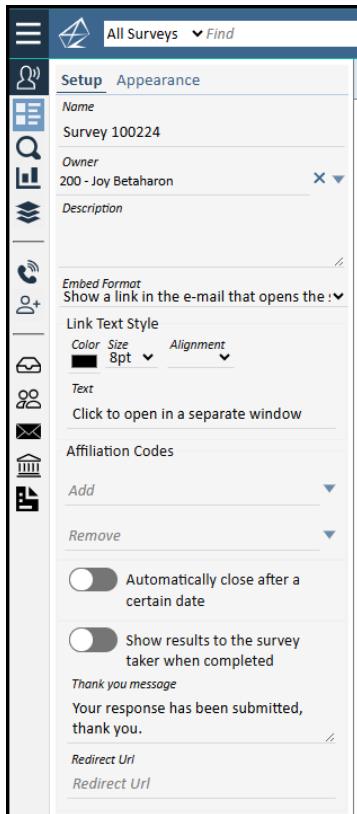
1. Navigate to Outreach → Surveys → All Surveys → +New: Survey.



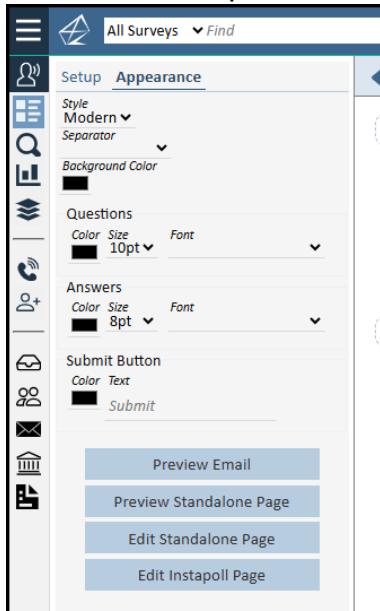
The screenshot shows the IQ5 software interface. The top navigation bar includes 'All Surveys' and a 'Find' field. Below the navigation is a toolbar with 'New', 'Change', 'Report', and 'More' buttons. The main content area displays a list of surveys. The 'Survey' row is highlighted with a red box. The left sidebar has a tree view with 'Outreach' expanded, showing 'Views', 'eNewsLetters', 'Targeted Mail', and 'Surveys'. 'Surveys' is also expanded, showing 'All Surveys (42)'. Other items in the sidebar include 'Webforms' and 'Mass Text'. The list of surveys includes:

Name	Status
Survey 100224	Draft
Iowa Survey July 11	Published
Survey_100222	Draft

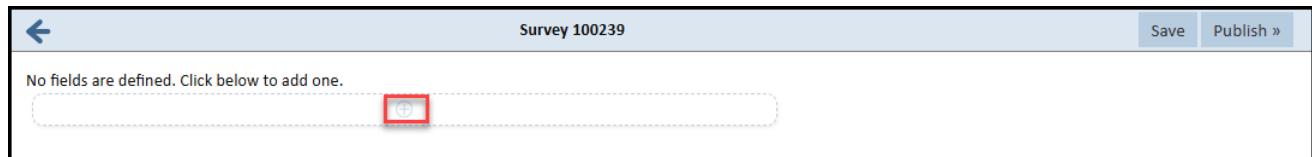
2. The editing window for the Survey now displays. Under **Setup**, edit the **Name**, **Owner**, and **Description** fields on the left-hand side.
3. Select the **Embed Format** that is best for the delivery of the Survey, along with the **Link Text Style** color, size and text. Optionally, choose an **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.



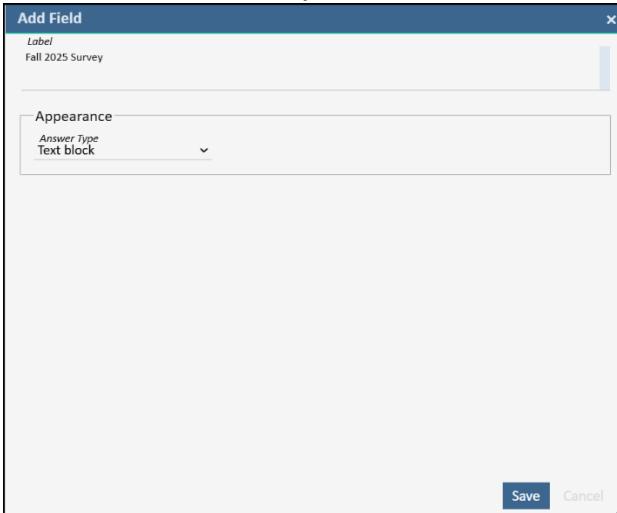
6. Click on the **Appearance** tab to change the Style of the Survey, along with other customization options. Take advantage of the various Preview options here as well.



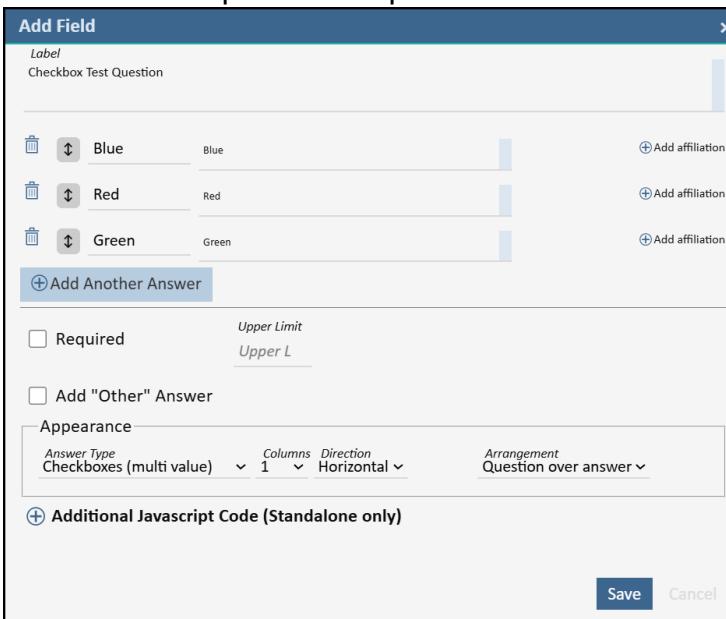
7. Begin adding questions to your survey. There are several formats to select once you click the + icon:



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



- 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.



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

Add Field

Label
Radio Button Test Question

Answers

- 1
- 2
- 3

Add Another Answer

Required

Add "Other" Answer

Appearance

Answer Type: Radio buttons (single value) Columns: 1 Direction: Horizontal Arrangement: Question over answer

Additional Javascript Code (Standalone only)

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
Radio Button Test Question

Placeholder Text
Placeholder Text

Answers

- 1 Answer 1
- 2 Answer 2
- 3 Answer 3

Add Another Answer

Required

Appearance

Answer Type: Dropdown (single value) Arrangement: Question over answer

Additional Javascript Code (Standalone only)

Save **Cancel**

+ ▾ EMAIL.OPTIN - New X ▾ -

+ Add affiliation

- ▾ EMAIL.OPTOUT - U X ▾ -

+ Add affiliation

+ Add affiliation

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

Add Field

Label
Fall 2025 Survey

Placeholder Text
Placeholder Text

Required

Appearance

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

Additional Javascript Code (Standalone only)

Save **Cancel**

- 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.

Add Field

Label
Radio Button Test Question

Placeholder Text
Placeholder Text

Answers

  1	Answer 1	 EMAIL.OPTIN - New   
  2	Answer 2	   EMAIL.OPTOUT - U   

Add affiliation

- 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.

Answers

  3	Answer 3
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Add Another Answer

Required Lower Limit: 1 Upper Limit: *Upper L*

Add "Other" Answer Placeholder: Other

Appearance

Answer Type: Checkboxes (multi value) Columns: 1 Direction: Horizontal

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**.