

## How to Create and Publish a Survey

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

**Module:** Outreach

**Purpose:** This guide provides instruction on how to create and send survey in IQ.

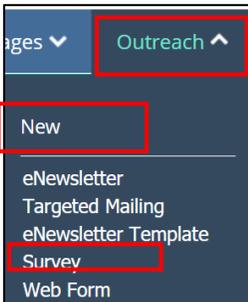
### Key Benefits

IQ provides the capability to create surveys. This feature is helpful when soliciting information/data from constituents to improve processes, streamline communications, and develop statistics. Surveys are included in eNewsletters or other targeted emails. Survey results are recorded in the Survey record and can be reviewed in the Form Letter or eNewsletter in which the survey is included as well as in each Contact record. Surveys can be embedded in the body of an eNewsletter, or can be accessed by clicking on an image of the survey in an eNewsletter. They can also be included as a link in the content of an eNewsletter.

IQ also provides a Survey Wizard to ensure all the steps required from creating to sending the survey are properly completed.

### 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 question is marked as required and lower/upper limits are not populated, at least one response is required.

<input type="checkbox"/> Required	Lower Limit <input type="checkbox"/>	Upper Limit <input type="checkbox"/>
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- 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.
- e. **Text Box** allows response to be typed in a text box.

### 3. 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 to the **Contact Record** when the survey is submitted.

### 4. Select the **Required** checkbox to indicate a response is required.

### 5. Select **Add an "Other" Answer option** to add an optional field to further clarify a response.

<input checked="" type="checkbox"/> Add an "Other" Answer Option
<b>Placeholder</b>
Other (please specify)

### 6. Select **Change the way Answers are displayed** to modify the display of the answers as needed.

<input checked="" type="checkbox"/> Change the way Answers are Displayed			
<b>Columns</b>	<b>Direction</b>	<b>Arrangement</b>	<b>Type</b>
1	Horizontal	Question over answer	Checkboxes (multi value)

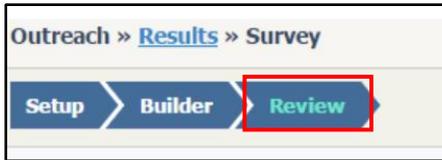
### 7. Select **Add Another Answer** to display more answers available for the survey.

[Add Another Answer](#)

### 8. Select **Save**.

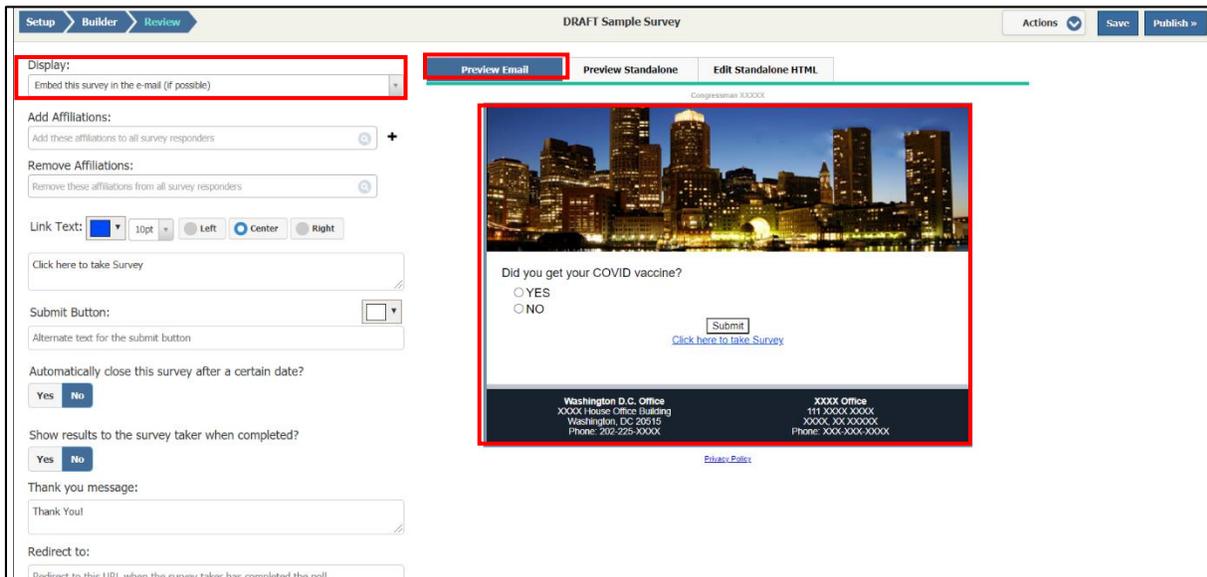
## Reviewing Survey Content

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



2. Complete the fields to select the **Display** used for the survey:

- "**Embed this survey in the e-mail (if possible)**" will allow recipients to complete and submit the Survey directly in the email itself.
- "**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.
- "**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.
- "**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 eNewsletters.

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