How to Create and Publish an IQ Web Form

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| **Market:** Federal/State/Local, House, Senate |
| **Module:** Outreach |
| **Purpose:** This guide provides instruction on how to create Web Forms in IQ. |
| **Key Benefits** |
| 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. |

Setting up Basic Web Form Information

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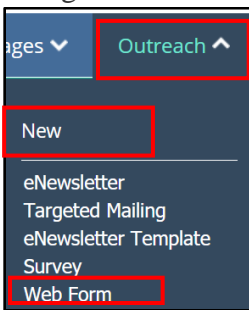
2. The **IQ Webform Wizard** is displayed on the screen and defaults to **Setup**. A sample web form is displayed.


3. Complete the following fields.

   a. **Name:** captures the name of the form.
   b. **Description:** refers to purpose of web form.
   c. **Owner:** defines permissions on who can and cannot edit the web form
   d. **This form will be sent to:** refers to whose email account will be receiving this web form.
   e. **When submitted this form will create:** refers to the type of record to create.

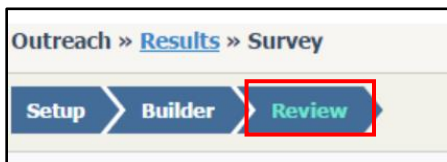## Building the Webform Content

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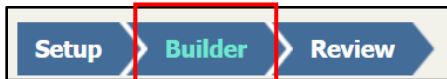
2. Select the format of the web form field and choose the appropriate fields to display.
   Note: these fields may vary depending on what type of web form you are creating.
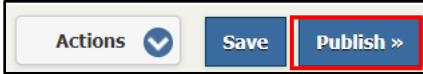
3. Select **Save**.

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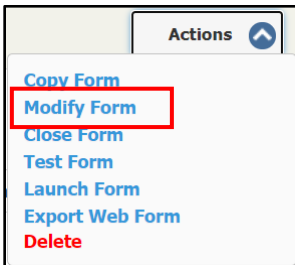
> **Note:** If IQ captures any entry errors while trying to publish the Survey, the dialog will remain open with the list of errors.
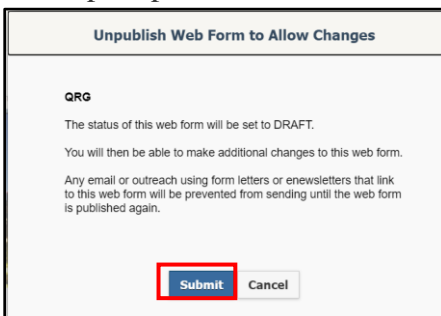
Creating a recurring Webform

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:

https://demo.lmhostediq.com/iqextranet/EForm.aspx?__cid=DSIIQFOL

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

Actions ⌄   Save   Publish »