

Custom Variables

Zoho Survey offers the following advanced features that take your surveying experience to a new level.

- Custom Variables
- <u>Scoring</u>
- Invite Reviewer
- <u>Share Survey</u>
- <u>Send Copy</u>
- <u>Transfer Survey</u>
- Export as PDF
- Print Survey

Using custom variables allows you to include information about a respondent in the survey without making the respondent answer those questions. In other words, it helps avoid asking for information that you already know. For example, imagine that there's a question in the survey that asks for the respondent's email. If you remove the <u>email question</u> from the survey but still need the respondent's email address, you can add a custom variable, and the email address will also show up in the survey reports. By extension, if you already know your respondents you can use custom variables and <u>piping</u> to <u>auto-fill</u> questions on your survey.

To add a custom variable in your survey:

- 1. Click **Advanced Options** on the upper-right side of the survey builder.
- 2. Click **Custom Variables**.
- 3. Complete the *URL Parameter* box. Make sure you remember what you write in this field because you'll need to use exactly the same variable name in the URL when sending out your survey. <u>Read on dynamic parameters here</u>.
- 4. Enter a description for the custom variable in the *Label* box.
- 5. Select the type of variable you'd like to use from the *Type* dropdown list:
 - Text
 - Email
 - Number
 - Choice: In the *Options* box, type in the choices (one per line). At least two options are required to save the variable.
- 6. Click Save Variable.

To test the custom variable:

- 1. Copy the survey link from the *Launch* tab.
- 2. Paste the URL in a new tab.
- 3. Add ?email=<email address of the respondent or any other variable> to the URL. The survey will open and this email address will be recorded along with the user's responses. Any number of custom variables can be added to a survey URL by separating the variables by an ampersand (&). For example, <u>https://surveylink?var1=[value]&var2=[value2]&var3=[value3]</u>.

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To edit an existing custom variable:

- 1. Click Advanced Options on the upper-right side of the survey builder.
- 2. Click Custom Variable.
- 3. Hover over the custom variable you want to edit and click \checkmark .
- 4. Edit the URL Parameter and Reports' Label boxes as needed.
- 5. Click Save Variable.

To delete a custom variable:

- 1. Click Advanced Options on the upper-right side of the survey builder.
- 2. Click **Custom Variable**.
- 3. Hover over the custom variable you want to delete and click fi.

Custom Variable in Piping

You can use these custom variables while piping. If you already know the respondent of your survey, for example, you can personalize your survey by removing the Name question, and creating a custom variable instead.

To add a custom variable with piping:

- 1. Create a custom variable, such as a name.
- 2. Add the variable name in the text of your question. Read more on piping.
- 3. Copy the survey URL in the *Launch* tab.
- 4. Paste the URL into a new tab.
- 5. Add '*?name* = <*name of the respondent*' to the URL. The question will automatically have the respondent's name filled in.

Merge Tags

You can merge tags from other applications so that they appear in your survey reports by using our integrations with <u>Zoho CRM</u>, <u>Zoho Campaigns</u>, or <u>MailChimp</u>. While <u>distributing</u> the survey with any campaign tool, custom variables can be defined as merge tags corresponding to the campaign tool. For example, <u>https://surveylink?var=\$[merge-tag]</u>. Learn more about adding merge tags to your URL <u>here</u>. When respondents submit the survey, you will find custom variables and extended custom variables in your survey reports. Using multiple custom variables helps reduce the number of questions in your survey, making it look neat, while still gathering the information you need.

Custom Variable Logic

You can add a custom variable logic in a similar way you would add a display logic for questions. Read on <u>custom</u> <u>variable logic here</u>.

Custom Variable in Trigger Emails

Read more on sending personalised email triggers using custom variables here.