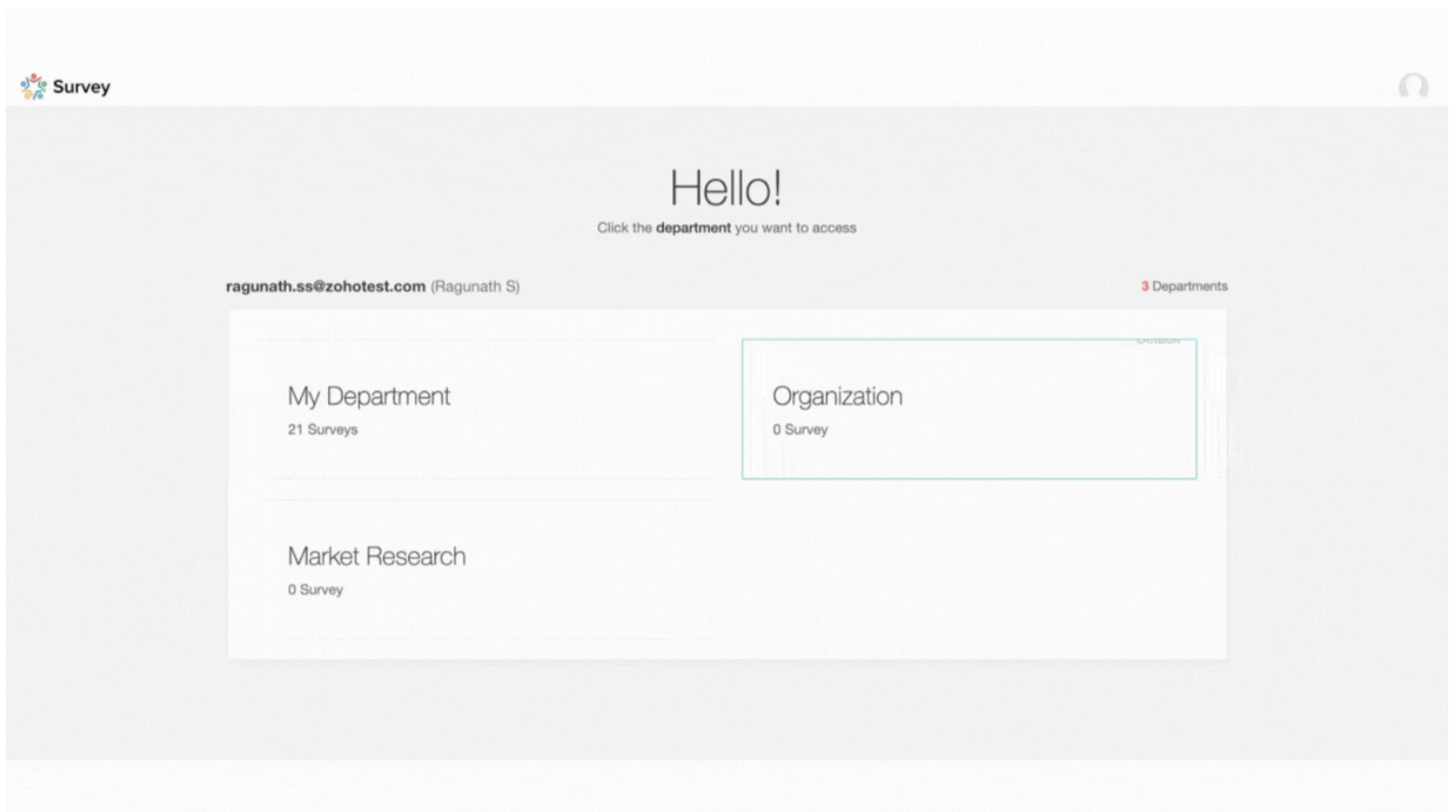




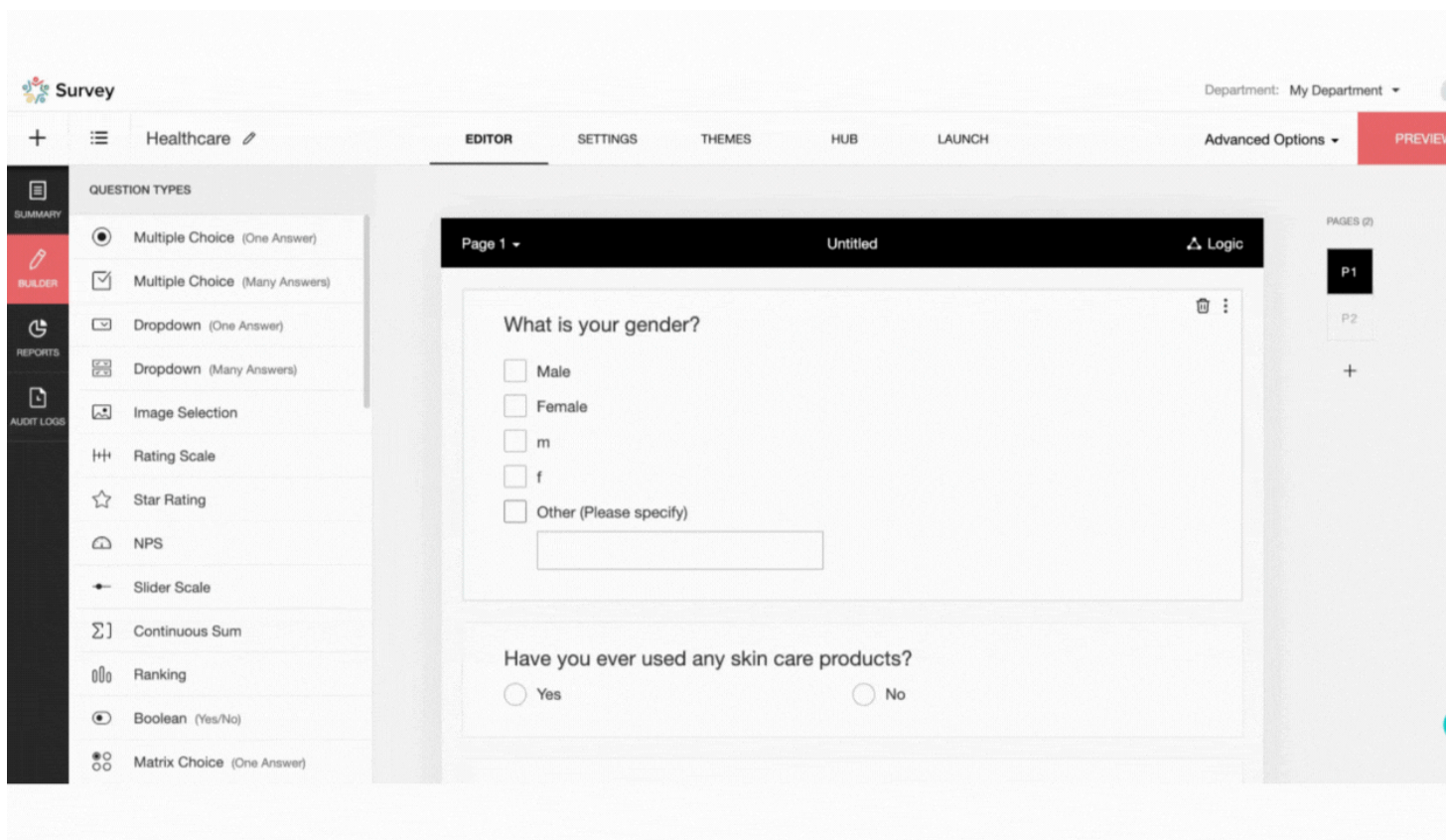
Tags - An Overview

Tags serve as distinctive markers used to associate with your surveys for enhanced search, sorting, categorization, filtering, and segmentation of surveys or individual responses more efficiently. They are akin to adding keywords or supplementary information to either a survey or individual responses. There are two types of tagging in Zoho Survey:

1. Survey tagging
2. Individual response tagging



Survey tagging is the type of tagging that helps you find surveys later when you search for them using tags. For instance, if several surveys in your Zoho Survey account pertain to customer feedback, you can tag them as "Customer Feedback Survey." This tagging enables effortless differentiation from other surveys within your Zoho Survey account.



Individual response tagging is the type of tagging that assists in efficiently finding particular individual responses during searches. These tags can be created based on your preferences to categorize them. For instance, tags like New Lead, Potential Customer, Positive NPS response, etc., can be used to classify a set of responses.

Benefits of Tagging Surveys:

Use tags to effectively organize your surveys according to your business requirements. Tagging plays a crucial role in various aspects of your Zoho Survey experience. Here are a few scenarios where tagging becomes essential:

- Tag your surveys according to their field of business. For instance, create tags for surveys intended for educational purposes, employees, or specific product users. Use multiple tags to categorize these surveys, enabling easy sorting or filtering when needed.
- Utilize tags based on demographics based on which you send out surveys like Event or team size. Incorporate various tags such as Trade Event Brazil, Trade Event Arizona, Marketing, Human Resources, etc. These tags will benefit other users handling surveys by providing insights and facilitating efficient data gathering.
- Add tags based on products - If your business offers multiple product lines and conducts surveys for each product, segment these surveys based on the particular product or service they focus on. Use tags to differentiate between surveys related to different products.

Benefits of Tagging Individual Responses:

Use tags to effectively organize your individual survey responses according to your requirements. Tagging plays a crucial role in various aspects of your response management experience. Here are a few scenarios where it comes handy:

- Add individual response tags based on the lead source. You can tag your survey responses according to where they originated. For instance, you might collect responses from various sources like different business units, trade shows, databases, or website surveys. Tag these responses as event responses, website responses, imported responses, and so forth.
- Tag individual responses based on specific contact criteria. For instance, you might need to reach out to a customer via email, phone, or at a particular time. Collect the customer's preferred contact method through the survey and tag them accordingly, such as contact via email, contact via phone, contact morning, and so on.
- Create tags representing different stages of the customer lifecycle. This segmentation assists in communicating with leads more effectively based on their stage. For example, label responses as *New Customer*, *Engagement Required*, etc., depending on the stage of the lead.



Points to remember

- Easily locate surveys by utilizing tags. You can either conduct a survey search or select specific survey types from the listed existing tags.
- Search individual responses by using tags. Choose particular types of individual responses from the existing tag listings.
- All tags are accessible to all users. Tags are made public to streamline tag organization and prevent duplicates.
- Ensure your tags have meaningful names as it simplifies the process of searching, creating, or editing information.