



Working with Tags

Tags are created to provide multiple access points for the surveys and individual responses in your Zoho Survey account. Once you have created tags, you can perform various actions such as,

- Filter surveys based on tags
- Filter individual responses based on tags
- Create reports based on individual response tags
- Manage survey tags
- Manage individual response tags

Filter surveys based on tags:

Tagging in Zoho Survey helps you easily search for relevant surveys. You can filter a list of surveys you're looking for by searching surveys with tags. For example, you want to get a list of surveys that you sent out to your customers in March 2023. You might have created various surveys after this time period and want to check them out specifically. Now, you can search for the surveys sent out in March 2023 from the survey main screen where the tags that you created with your surveys are visible. In this case, you have created a tag named March 2023 in the surveys that were sent out in March 2023. By selecting the required tags, you filter the surveys that were sent out in March 2023.

To filter surveys based on tags:

1. Open the *My surveys* page in your Department.

2. Click on the required tag on the left pane.

21
SURVEYS

15 PUBLISHED

6 DRAFTS

CREATE SURVEY

Tags

employee  satisfaction  HR 

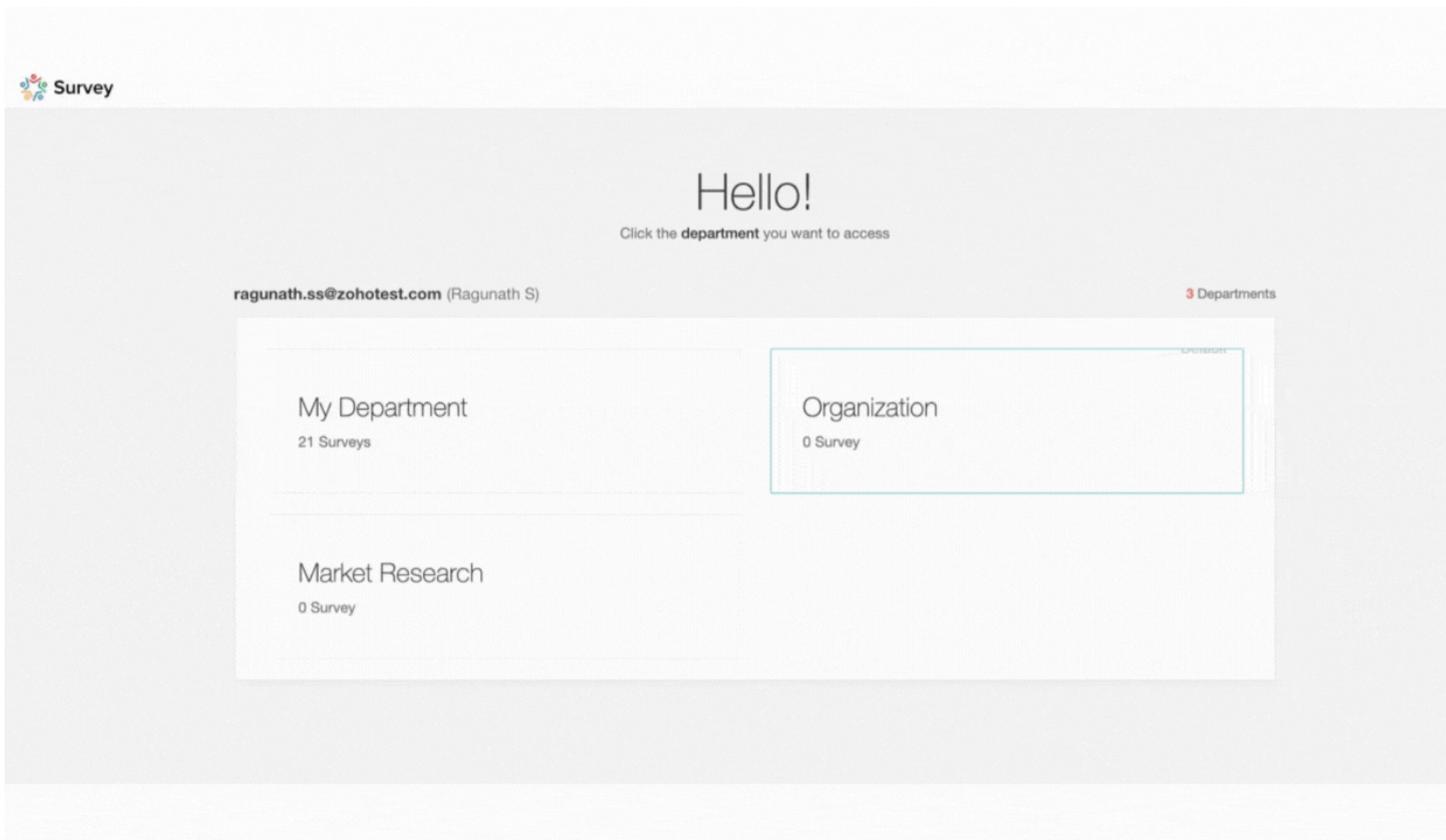
brand  feedback 

marketing  test  2022 

2024  Business 

3. The surveys that have the selected tag added to them are listed.

Using survey search:



Log in to your Zoho Survey account and navigate to the required department. Enter the required tag names in the survey search bar. The surveys matching the search name will be displayed.

Filter individual responses based on tags

Individual response tagging in Zoho Survey helps you to easily find the required individual responses. You can filter a list of individual responses that you're looking for by selecting the responses that you've created. For example, you want to get a list of the individual responses gathered from new customers from a set of various customers who attended your survey recently. In this case, you can select the tag, New Customers, from a list of tags that you created recently for all the responses. By selecting the required tags, you filter the individual responses that were gathered from new customers.

To filter individual responses based on tags:

1. Click on *Individual Responses* on the *Reports* page in your survey.
2. Click on the **All Responses** dropdown under Filter by on the left pane.

3. Click on **Create Filter**.

× **Create Filter**
Filtering allows you to analyze data from a subset of respondents

Filter name

Conditions

Response date range: To

Response status:

- Completed responses
- Partial responses
- Disqualified responses
- Over Quota responses

Select response tags:

Language:

- Potential Customer
- Sale Completed
- New Lead
- New Zealand Customer

Logic

CANCEL **SAVE**

4. In the *Create Filter* window, fill in the filter name, date range, response status, languages and logic as required.

5. Click on the **Select response tags** dropdown and select the required tags.

6. Click **Save**.

Create reports containing individual response tags:

In Zoho Survey, you can create customizable individual reports with flexible questions and options. That said, you can also create individual response reports, containing the tags added to your survey responses.

To create reports containing tags:

1. Click on *Individual Responses* on the *Reports* page in your survey.

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Create a Custom Report

Custom reports display data about specific questions

Report name
Please name your report

Select the questions to include in the report Select all

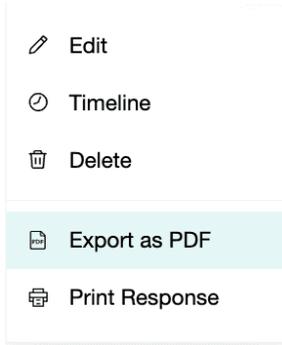
- Response Fields
- Response ID
- IP address
- Response Status
- Survey URL accessed by the respondent
- Start time
- Completion time
- Time taken
- Collector
- Total rating
- Net Promoter Score

CANCEL SAVE

2. Click on **Create** under *Custom Report* on the left pane.
3. Enter the *Report name*.
4. In the list of questions available, select Tags.
5. Click **SAVE**.

To export an individual response containing tags as PDF:

1. Click on *Individual Responses* on the *Reports* page in your survey.
2. Click on <...> next to the individual response.



3. Click on Export as PDF.

To export individual responses containing tags:

1. Click on *Individual Responses* on the *Reports* page in your survey.
2. Click on the **Export dropdown** in the right upper corner.
3. Click on the required format and click **Export**.

Manage tags in a survey:

In Zoho Survey, you can choose any tag where you want to manage tags and start adding new tags, or delete the existing ones from the available list. **To manage tags in a survey,**

1. Open the *My surveys* page in your Department.
2. Click <delete> on the required tag on the left pane.
3. Click **Yes**.

Alternatively, you can also manage the survey tags from the respective surveys as well.

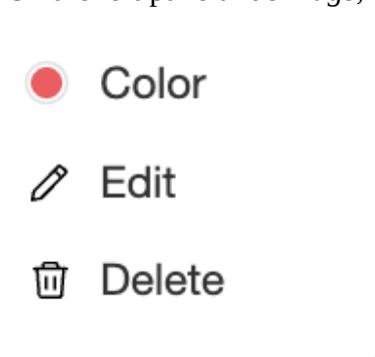
1. Open the required survey.
2. Click on <edit> next to the survey name on the top left corner.
3. In the **Add Tag** text box,
 - a. Click <x> next to the tag to delete the tag.
 - b. To add an existing tag, enter the tag name and select the respective tag from the list of survey tags.
 - c. To add a new tag, enter the tag name and press Space.
 - d. Click **Update**.

Manage tags in an individual response:

In Zoho Survey, you can choose any tag where you want to manage tags and start adding new tags, or delete the existing ones from the available list.

To manage an individual response tag:

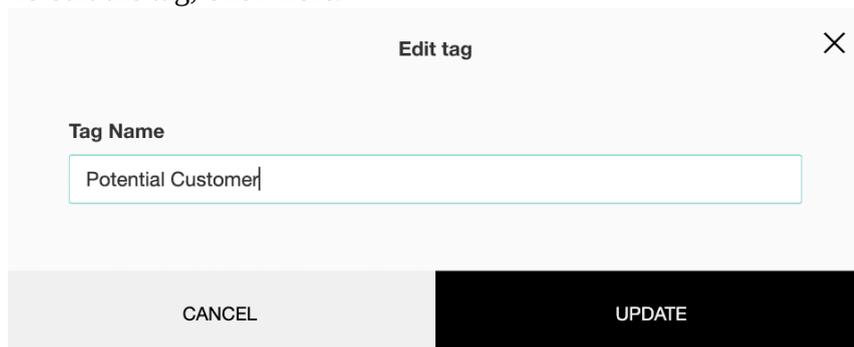
1. Go to the **Reports** tab and select the *Individual Responses* section.
2. On the left pane under *Tags*, click on the required tag. A dropdown appears with the following actions:



a. To change the tag's colour, click **Colour**.

i. Choose the required colour from the colour palette and click **OK**.

b. To edit the tag, click **Edit**.



The image shows a dialog box titled "Edit tag" with a close button (X) in the top right corner. Below the title is a label "Tag Name" and a text input field containing the text "Potential Customer". At the bottom of the dialog, there are two buttons: "CANCEL" on the left and "UPDATE" on the right.

i. Rename the tag and click **UPDATE**.

c. To delete the tag, click **Delete**.

i. Click **YES**.

3. Tags can also be removed from individual responses by:

a. Navigate to the specific individual response.

b. In the list of individual response parameters, click on  next to the required tag.