Zoho Survey

Zoho Survey is an intuitive online survey tool designed to help you transform your ideas into actionable questions and create custom surveys. This training course covers everything from basic survey creation to advanced integration and analysis, empowering you to collect and interpret data for better business decisions.

Who Is It For?

- This course is ideal for anyone interested in creating online surveys using Zoho Survey.
- The Portal and Department Setup module is specifically relevant for administrators.

Course Modules

Module 1: Introduction
- Introduction to surveys
- Survey use cases by industry
- Product blueprint

Module 2: Survey Creation
- Creating surveys from scratch
- Creating surveys from templates and existing surveys
- Piping and personalizing surveys
- Applying themes
- Applying logic

Module 3: Advanced Options
- Setting up trigger functions and trigger emails
- Adding scores to weigh responses
- Using custom variables and advanced options (translate, transfer, export, etc.)
- Purchasing responses or research panels
- Preventing multiple responses

Module 4: Survey Distribution
- Publishing online and offline surveys
- Distributing surveys over email
- Sending inline emails
- Embedding surveys and pop-up surveys
- Securing your surveys

Module 5: Reporting
- Analyzing the summary of responses
- Analyzing individual responses
- Customizing reports (filters, custom reports, cross tab reports, trend reports, text analysis, sentiment analysis)
- Scheduling reports and advanced options (sharing, exporting, downloading reports)

Module 6: Integrations and Third-Party Setups
- Setting up CRM integration
- Distributing surveys using Zoho Campaigns
- Setting up other integrations (Zoho Analytics, Shopify, Zendesk, Eventbrite)
- Integrating Zoho Survey with Slack
- Triggering webhooks

Module 7: Portal and Department Setup
- Managing portals and departments
- Adding users to portals and departments
- Setting up and managing a custom domain
- Tracking activities using audit logs