



IT technicians · Zoho One optimization



Zoho Survey

User and Administrator Manual

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Survey features available to users and the functions reserved for administrators, as available in September 2026.

Interface labels may vary slightly depending on your account language and plan.

1.2 What is Zoho Survey?

Zoho Survey is Zoho's online survey tool. It lets you design surveys and questionnaires with conditional logic, distribute them by email, link, website, SMS or QR code, then analyze results with reports, cross-tabs and metrics such as NPS.

- Customer satisfaction (NPS, CSAT, CES)
- Employee engagement (eNPS)
- Training and event evaluations
- Market research and concept testing
- Scored quizzes

1.3 Zoho Survey or Zoho Forms?

Need	Recommended tool
Measure opinion, analyze trends, calculate NPS	Zoho Survey
Collect operational data (requests, orders, registrations, payments)	Zoho Forms
Anonymous survey with advanced statistical reports	Zoho Survey
Approval process or CRM push after each submission	Zoho Forms

1.4 Signing in

1. Go to <https://survey.zoho.com> (or <https://survey.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Survey.
4. Choose the department you work in, if there are several.

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2. Interface and survey management

2.1 Dashboard

- Survey list: drafts, live (open), closed
- Shared with Me section
- Number of responses and date of last response
- Search, filters and folders

2.2 Survey tabs

Tab	Purpose
Builder	Questions, pages, logic, theme
Settings	Navigation, security, quotas, messages, languages
Launch / Distribute	Collectors: link, email, website, SMS, QR, offline
Reports	Summary, individual responses, custom, cross-tab and trend reports

2.3 Survey actions

- Duplicate, rename, move to a folder
- Share with colleagues or transfer ownership
- Send a copy to another user
- Export to PDF or print the questionnaire
- Close or reopen response collection

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3. Creating a survey

3.1 Ways to create a survey

Method	When to use it
Blank survey	You start from scratch
Template	Template library: satisfaction, HR, events, education, market research
AI-powered creation	Describe your goal; a complete survey is generated in minutes
Import a document	Turn an existing Word questionnaire into a survey
Bulk question builder	Paste a list of questions and choices as text
Question bank	Reuse validated questions

3.2 Creating a blank survey, step by step

1. Click Create Survey > Blank Survey.
2. Enter the title and choose the main language.
3. Add an introduction page explaining the purpose, duration and privacy.
4. Add your questions from the left pane.
5. Organize them into logical pages and enable the progress bar.
6. Preview on desktop and mobile, then send the preview to a colleague for review.

Nuagix tip — Aim for a survey under 10 minutes. State the estimated duration in the introduction: completion rates go up.

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4. Question types

4.1 Choice questions

Type	Use
Multiple choice (one answer)	Radio buttons or dropdown
Multiple choice (several answers)	Checkboxes, with minimum and maximum
Image choice	Selection from images
Yes / No	Binary answer
Ranking	Order items by preference

4.2 Scales and metrics

Type	Use
Rating scale	Stars, emojis or numbers
Likert scale / matrix	Several statements rated on the same scale
Net Promoter Score (NPS)	"How likely are you to recommend us?" from 0 to 10
CSAT, CES, eNPS	Satisfaction, effort, employee recommendation
Slider	Value on a continuous scale
Constant sum	Distribute 100 points across several options

4.3 Open-ended and other questions

- Short and long answer (free text)
- Contact information, email, numeric, date
- File upload
- Consent question
- Descriptive text, image or video between questions
- Quiz questions with correct answers and scoring

4.4 Question options

- Mandatory or optional
- Randomize choices or questions
- “Other” option with a text box
- Validation (email format, numeric range, character count)
- Timer for quizzes

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5. Logic and personalization

5.1 Logic types

Logic	Effect
Question Logic	Show or hide a question based on a previous answer
Answer Logic	Tailor the choices offered based on a previous answer
Page Logic	Send the respondent to a specific page or to the end of the survey
Carry Forward	Reuse the selected choices in a later question
Custom script	Complex flows in JavaScript or Deluge

5.2 Adding page logic

1. In the builder, click Logic under the relevant page.
2. Choose the source question and condition (e.g., NPS less than or equal to 6).
3. Define the action: go to the "Areas for improvement" page.
4. Add other conditions, then test every path in preview.

5.3 Piping

- Insert a previous answer into a question's text (e.g., "Why did you choose [product]?")
- Custom variables passed in the URL (e.g., ?client=ABC®ion=Laurentians)
- Respondent variables pulled from contacts or integrations
- Autofill of already-known information

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6. Appearance and languages

6.1 Themes

- Mobile-friendly predefined themes
- Custom theme: logo, colours, fonts, background, header
- Language-specific styles
- Custom domain for survey links (see the administrator section)

6.2 Multilingual surveys

1. Settings > Languages > Add Language (e.g., French).
2. Translate every question, choice and message, or import a translation file.
3. Respondents choose their language, or it is set by the link you send.

Nuagix tip — In Quebec, publish surveys in French first, with English as a secondary language.

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7. Survey settings

7.1 Respondent experience

- Progress bar and question and page numbering
- Previous / Next buttons
- Save and Continue Later
- Custom messages: survey end, survey closed, quota reached
- Redirect to a web page at the end

7.2 Collection control

- Survey end date
- Response quotas: total, per collector or conditional (e.g., 100 responses per region)
- One response per person (unique link, cookie or IP address)
- CAPTCHA against automated responses
- Password protection and IP address restriction

7.3 Privacy

- Anonymous survey: turn off collection of IP addresses, geolocation and personal information
- Hash URLs to prevent parameter tampering
- Marking of electronic protected health information (e-PHI)

Caution — If you announce an anonymous survey, actually turn off IP collection and do not use personalized links that identify the person.

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8. Distributing a survey

8.1 Collectors

Collector	Use
Web link	URL to share by email, chat or social media
Email campaign	Personalized send to a list, with reminders and response tracking
Website embed	Survey embedded in a page or as a pop-up
SMS	Send by text message (Clickatell, Twilio, SMS Magic)
QR code	Posters, invoices, packaging, events
Offline / kiosk	Mobile app to collect without internet
Audience panel	Buy targeted respondents

8.2 Sending an email campaign

1. Launch > Email > New Campaign.
2. Import or choose the contact list (CSV or integration).
3. Personalize the subject and message with the contact's first name.
4. Use a verified sender address from your domain.
5. Send now or schedule; set up reminders for non-respondents.
6. Track opens, partial and complete responses.

Nuagix tip — Create a separate collector per channel (email, website, QR): you can then compare results by source.

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9. Reports and analysis

9.1 Report types

Report	Content
Dashboard	Overview: response count, completion rate, key metrics
Summary	Chart for each question
Individual responses	Each full response, with tags and notes
Custom report	Selected questions, filters, charts and commentary
Cross-tab	Compare answers by a criterion (e.g., satisfaction by region)
Trend	Change in results over time

9.2 Advanced analysis

- NPS, eNPS, CSAT, CES, DSAT and NSAT calculated automatically
- Sentiment analysis and word cloud for open-ended answers
- TURF analysis to optimize a combination of options
- Survey completion time
- Filters by answer, collector, date or variable

9.3 Sharing and exporting

- Export to XLS, CSV, PDF, SPSS, Tableau extract, image or ZIP
- Send data to Zoho Sheet or Zoho Analytics
- Share a report by link, with access control
- Schedule automatic email delivery of a report

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10. Automations and documents

10.1 Actions after a response

- Trigger Emails: thank the respondent or alert the team (e.g., NPS 0 to 6)
- Trigger functions (Deluge): update another system
- Document Merge: generate a personalized PDF (certificate, training attestation)
- Google Analytics, Google Tag Manager and Facebook Pixel tracking

Nuagix tip — Set up an email alert for every detractor (NPS 0 to 6) so your team can follow up with the customer quickly.

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11. Collaboration and mobile app

11.1 Working as a team

- Share a survey with colleagues (edit or view)
- Invite reviewers to comment on the questionnaire before launch
- Send a preview URL
- Share reports read-only with management

11.2 Mobile app

- View surveys and results
- Collect responses offline on a tablet (events, field work)
- Kiosk mode for successive responses
- Automatic sync when the connection returns

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12. Best practices

12.1 Nuagix recommendations

- Define the goal and the decisions the survey must inform before writing questions
- One idea per question; avoid leading or double-barrelled questions
- Put sensitive and demographic questions at the end
- Use consistent scales throughout the survey
- Test every logic path before launch
- Remind non-respondents once or twice, no more
- Share results and actions taken with respondents
- Measure regularly (e.g., quarterly NPS) to track trends

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Part 2 — Administrator Guide

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13. Portal, departments and roles

13.1 Structure

The portal represents the organization. It can contain several departments (e.g., Marketing, HR, Customer Service), each with its own surveys, users and settings.

13.2 Roles

Role	Main permissions
Portal admin	Full control: departments, users, subscription, security, domains
Department Admin	Manage the department's users and surveys
User	Create and manage their own surveys and those shared with them
Contractor	Limited access to the surveys assigned to them
Report Viewer	View reports only

13.3 Adding a user

1. Settings > Users > Add User.
2. Enter the email address and choose the department.
3. Assign the appropriate role.
4. The user receives an invitation to join the portal.

Note — In Zoho One, access to Zoho Survey is first granted from the Zoho One admin console.

13.4 When an employee leaves

1. Transfer ownership of their surveys to another user.
2. Check email campaigns and scheduled reports in their name.
3. Deactivate the user, then remove their license.

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14. Email and domains

14.1 Sender and authentication

1. Settings > Email > Sender Addresses: add and verify the addresses used.
2. Authenticate your domain with DKIM (TXT record provided) and check your SPF record.
3. Test a campaign send to several mailbox providers (Outlook, Gmail).

14.2 Custom domain

1. Settings > Custom Domain > Add Domain (e.g., survey.yourdomain.com).
2. Add the provided CNAME record to your DNS zone.
3. Verify the domain; survey links will use your address, over HTTPS.

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15. Security, audit and compliance

15.1 Security

- Multi-factor authentication and single sign-on managed by Zoho Accounts / Zoho Directory
- SSL certificate on all surveys
- IP-based access restriction and password-protected surveys
- Audit logs that can be filtered and exported to CSV or XLS
- Hosting in the Canadian data center available (zohocloud.ca)

15.2 Compliance

- HIPAA compliance and marking of health information (e-PHI)
- GDPR compliance: consent, right of access and deletion
- Quebec Law 25: tell respondents the purpose, limit collection, set a retention period
- Turn off collection of IP addresses, geolocation and personal information when not needed

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

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16. Integrations

16.1 Available integrations

Application	Typical use
Zoho CRM	Send a survey to contacts, record responses in the CRM record
Zoho Desk	Satisfaction survey after a ticket is closed
Zoho SalesIQ	Survey sent within a chat
Zoho Campaigns	Distribute a survey to a mailing list
Zoho Sheet / Zoho Analytics	Export and analyze responses
Google Analytics, Tag Manager, Facebook Pixel	Visit and conversion tracking
Webhooks and Deluge functions	Send responses to other systems

16.2 Connecting Zoho Survey to Zoho CRM

1. Settings > Integrations > Zoho CRM > Connect.
2. Choose the module (Contacts, Leads) for distribution and respondent variables.
3. Map questions to the CRM fields to update (e.g., NPS score).
4. Test with a dummy contact and check the record in the CRM.

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17. Subscription and plans

17.1 Plans

Plan	For whom
Free	Simple surveys, limited responses
Basic / Standard	Small businesses: logic, themes, exports
Professional	Advanced reports, departments, integrations, stronger security
Enterprise	Large organizations: multiple users, advanced compliance
Zoho One / Marketing Plus	Zoho Survey included in the suite

17.2 Tracking usage

Settings > Subscription shows the plan and the number of users, surveys and responses. SMS credits and panel respondents are billed separately.

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18. Deployment checklist

18.1 Before the first survey

- ☐ Departments created and users added with the right roles
- ☐ Branded theme created
- ☐ Custom domain configured
- ☐ Sender addresses verified and domain authenticated (DKIM, SPF)
- ☐ Privacy policy and purpose statement added to the introduction
- ☐ IP and geolocation collection set according to the goal
- ☐ Zoho CRM and Zoho Desk integrations configured
- ☐ Trigger emails for detractors configured
- ☐ Report scheduled for management
- ☐ Survey tested by at least two people, on desktop and mobile
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Survey setup, integration and training. Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Survey	Sondage
Builder	Générateur
Collector	Collecteur
Response	Réponse
Question Logic	Logique de question
Page Logic	Logique de page
Carry Forward	Report des réponses
Piping	Insertion de données
Quota	Quota
Save and Continue Later	Enregistrer et continuer plus tard
Cross-tab Report	Tableau croisé
Trend Report	Rapport de tendance
Sentiment Analysis	Analyse de sentiment
Word Cloud	Nuage de mots
Trigger Email	Courriel déclenché
Document Merge	Fusion de documents
Report Viewer	Lecteur de rapports
Contractor	Contractuel
Audit Log	Journal d'audit
Question Bank	Banque de questions

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