



Zendesk

Integrating Zendesk with Zoho Survey empowers businesses to enhance their customer support and feedback collection processes. This seamless integration streamlines the process of sending surveys to customers after you've resolved their support tickets through Zendesk. Using scheduled email distribution, businesses can collect valuable insights, gauge customer satisfaction, and identify areas for improvement. This integration ensures a holistic approach to customer experience management, boosting efficiency and promoting stronger customer relationships with just a few clicks.

Use cases:

Suppose you run an e-commerce business and use Zendesk for customer support ticket management. You want to gather feedback from customers after their support tickets are resolved so you can continuously improve your support services. First, you set up Zendesk to manage customer support requests and tickets. Next, you integrate it with a survey. Once a support ticket is resolved, an automated email is sent to the customer thanking them for using your support services and politely asking for their feedback.

The email includes a link to the Zoho Survey form where they can share their thoughts and suggestions.

To install the Zoho Survey app in your Zendesk account:

1. Log on to your Zendesk account.
2. Search for Zoho Survey in the [Zendesk marketplace](#).
3. Click **Zoho Survey**.
4. Click **Install**.



Zoho Survey



Boost your customer satisfaction with the right information using Zoho Survey.

Install



Description

How to install

Zoho Survey + Zendesk = Satisfied customers.

Use Zoho Survey to gather the information you need to improve your customer service.

Already being used by 100,000 businesses, Zoho Survey makes sure you can create surveys and follow up on your customers with no hassle.

Zoho Survey has templates covering several industries and their specific needs, including hospitality, healthcare, education, and marketing.

Using the Zoho Survey integration with Zendesk can build your customer relationships better by:

- Sending branded surveys via Zendesk to increase your response rates

App Details

Author: Zoho Survey

Price: Free

Support: [Email](#) / [Website](#)

Version: 1.0

This is an app. It will install right into your Zendesk Support account.

5. Click **Install**. Zoho Survey will be installed in your Zendesk account. The app will be placed on the left



APP INSTALLATION

Zoho Survey



Select account to install this app:

zylker1309.zendesk.com



Install

pane for ease of use.

6. Type a name in the *Title* field.

7. Click **Enable role restrictions?** and select roles that can access your app.

8. Click **Enable group restrictions?** and select groups that can access your app.

9. Click **Install**.

The screenshot shows the Zendesk Marketplace interface. On the left is a navigation sidebar with categories: APPS, MANAGE, CHANNELS, and BUSINESS RULES. The 'Marketplace' link is highlighted. The main content area is titled 'Zendesk Marketplace' and features the 'Zoho Survey' app. The app details include: Version: 1.0, Framework Version: 2.0, Email: support@zohosurvey.com, and Location: Main Navigation. Under the 'INSTALLATION' section, there is a 'Title*' field containing 'Zoho Survey'. There are two checkboxes: 'Enable role restrictions?' (unchecked) and 'Enable group restrictions?' (checked). Below these are text boxes for selecting roles and groups. At the bottom, there is an 'Install' button and a note: 'By installing this app you hereby agree to the Zendesk Marketplace Terms of Use.'

10. Click the app to open.

The screenshot shows the 'My Apps' page in Zendesk. The left sidebar is the same as in the previous image. The main content area is titled 'My Apps' and has two tabs: 'Currently installed' (active) and 'Private Apps'. There are buttons for 'Marketplace' and 'Upload private app'. A 'Filter apps' dropdown menu is set to 'Enabled apps', and a 'Reorder apps' button is visible. Under 'Enabled apps', the Zoho Survey app is listed with its logo and name. Below this, there is a section for 'Disabled apps' which is currently empty.

11. Click **Authorize**.

12. Click **Allow** to allow Zoho Survey to read and write all Zendesk user data.

To send a survey to your event attendees:

1. Log on to your survey app using your Zoho account. If you don't have a Zoho account already, sign up to use the app.
2. Click **Create New** after opening the Zoho Survey app.
3. Select a survey to send from the *Select a Survey* dropdown list.
4. Select a collector from the *Collector* dropdown list.
5. Click **Next**.
6. Click on the *Templates* dropdown.
 1. To select an existing email template, click **Select an existing email template**. Choose a template and click **Use Template**.
 2. To save your current template for future use, click **Save as template**. From here, you can choose to overwrite an existing email template or create a brand new template.
7. Enter the subject of your email in the *Subject* textbox. You can insert variables by clicking **Insert Variable**.
8. To edit the email contents, click on **Edit Message**.
 1. From here, you can edit the *Header*, *Body*, and *Survey Link* sections. Enter a title in the *Title Name* textbox.
 2. Click the **Background Color** and **Font Color** palettes in the *Header* section to adjust the colors of your template.
 3. Enter the body of the email in the *Rich Text Editor*.
 4. Set the survey link display type to **Button** format or **Question Embed** format.
 1. If you choose Button:
 1. Enter a button label in the *Button Label* textbox.
 2. Click the **Background Color**, and **Font Color** palettes in the *Button* section to adjust the colors of the button name.
 2. If you choose Question Embed:
 1. Choose the question to be embedded in the dropbox.
5. Add a URL parameter by clicking + **Add Parameter**. Then, enter the URL and select the value. Click + to add more parameters and **X** to delete a parameter.
6. Click the *Select Value* dropdown and set the value. You can insert a direct value as a respondent variable by clicking **Edit**. For example, type "Organization" and under *Select Value*, click **Param-Value** and enter "XYZ Inc." Make sure you have created a corresponding custom variable for "Organization" in the survey.
7. Select **Show "Powered by Zoho Survey"** in the footer, if you want the message displayed.
8. Click **OK**.
9. Click **Next**.

10.

The screenshot shows the 'Create Email' interface. At the top, there's a 'From' dropdown. Below it is the 'Send to' field with a '+ IMPORT CONTACTS' button. The 'Subject' field contains 'I'd like your opinion'. The 'Message' section has a toggle for 'Use First Question' and an 'Edit' icon. The message preview shows a survey invitation for 'Team Treat' with a 'Begin Survey' button. Below the preview is a note: 'Note: Use 'Restrictions', in the left menu, to prevent multiple responses'. At the bottom, there are 'SAVE' and 'SEND' buttons.

11. To send your email immediately, click **SEND NOW** under *Immediately*.
12. To schedule the email, click **SCHEDULE** under *At Scheduled Time*. You can choose the date and time from their respective dropdowns to schedule the email.
13. Select **Send Periodically** to send the email regularly over a defined period and set the interval. Select the start and end date on the *Start Date* and *End Date* calendars respectively.
14. Click the *Set Interval* dropdown to select the interval and time at which the email invite should be sent out.
15. If you want to set a custom interval, click **Custom Interval** and select the interval and date from the dropdown.
16. Click **Schedule**.

Note

- You can add up to 1,000 email addresses per batch for an email campaign (i.e. you can send 1,000 emails at a time).
- Only verified domains in DKIM can be displayed as a "from" address. If the domain is not configured, the default "from" address will be "survey@invitation.zohosurvey.com"

To schedule an email invite or a reminder:

You can now automate an email distribution invite or a reminder to be sent out at a time you decide. [Learn more about it here.](#)

To track your survey:

1. Click the survey you want to track from the list of published surveys.
2. Click **Overview** to view the following details.
 - **Invites** - Displays the details of how many of your respondents have opened your invite, how many are yet to open it, if any email has been scheduled or bounced, or if someone has unsubscribed from your invite.
 - **Responses** - Displays the total number of responses, and the details of completed, partial, and disqualified responses.
 - **Invite History** - Displays the date and other details of each invite. Click **View** for a detailed history.

Email	Sent	Responded
triciab@zylker.com	Yes	Not responded
tamarah@zylker.com	Yes	Not responded
evanr@zylker.com	Yes	Not responded
fatimay@zylker.com	Yes	Not responded
cameronp@zylker.com	Yes	Not responded
russellt@zylker.com	Yes	Not responded
janicev@zylker.com	Yes	Not responded
nathanb@zylker.com	Yes	Not responded

3. Click **Recipients** to see the following details.
 - **Search Recipients** - Search for a recipient by using keywords.
 - **Email** - Displays email addresses of the email invitees.
 - **Sent** - Displays whether your invite has been sent.
 - **Responded** - Displays the response status of your survey. If they have responded, click **View Response**. It will take you to the reports section where you can see detailed response details. You will also be able to track the respondent variables applied here.
 - **Filter** - Filter your recipients based on various parameters.

OVERVIEW RECIPIENTS + CREATE NEW

Search Recipients Unopened ▾

Email	Sent	Responded
triciab@zylker.com	Yes	Not responded
tamarah@zylker.com	Yes	Not responded
evanr@zylker.com	Yes	Not responded
fatimay@zylker.com	Yes	Not responded
cameronp@zylker.com	Yes	Not responded

To edit the draft email invite:

1. Click on the **Draft Saved** tag on the email template and click  to edit the default email template.
2. Edit the contents of the email invite as described earlier and click **OK**.

Create Email

From

Send to

+ IMPORT CONTACTS

Recipients

Subject

I'd like your opinion

Message

Use First Question

[Edit](#)

Team Treat

We're conducting a survey and your opinions would be appreciated. Click the button below to start the survey. Thank you for your participation!

[Begin Survey](#)

Please do not forward this email. Its survey link is unique to you.
[Unsubscribe](#) from this list

Powered by
 Survey

Note: Use '**Restrictions**', in the left menu, to prevent multiple responses

I agree to the [E-Mail Distribution - Terms of Service](#)

Powered by 

SAVE

SEND

3. Make edits to the title of the email template, if any, in the *Title name* box. If you do not make any changes to the title, it will take the name of the survey by default.
4. Click **Background color** and **Font color** palettes in the *Header* section to adjust them in the template.
5. In the *Button name* field, make edits to the button name, if required.
6. In the *Button URL* field, click **+ Add Parameter**, to insert the respondent variable from Zendesk into your survey.

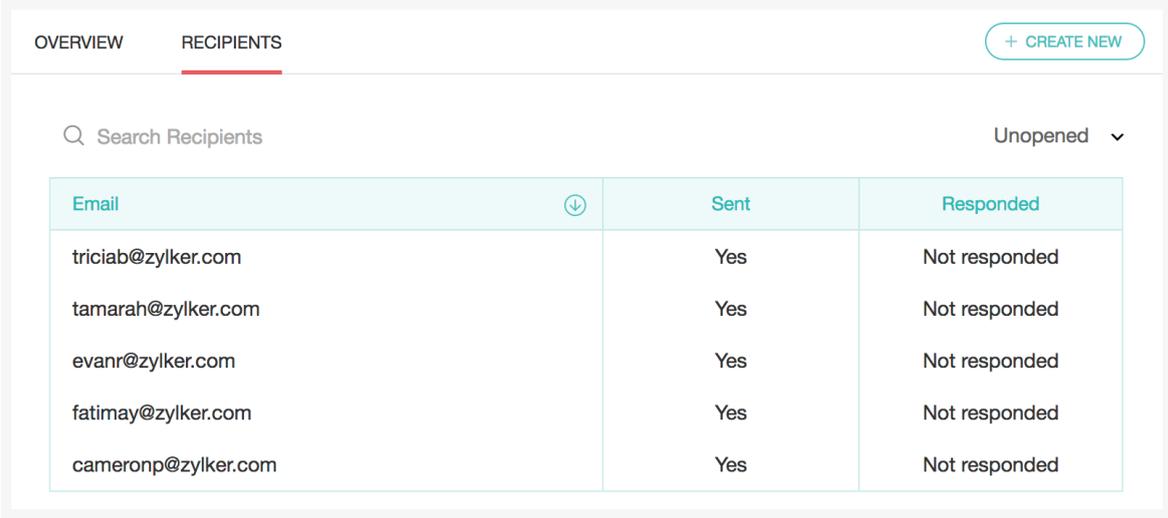
7. Type name, if, for example, you want to track the respondent's name.
8. Click the *Select value* dropdown and select either first name or last name.
9. Click **OK**. Similarly, you can also insert a direct value as a respondent variable. For example, type 'Organization' and in Select value, click param-value and enter "XYZ Inc". Make sure you have the corresponding custom variable for 'organization' created in the survey.
10. Click **the Background color**, and **Font color** palettes in the *Button* section to adjust them in the button name.
11. Select whether you want to show the default 'powered by Zoho Survey' option.
12. Click **Save**.
13. Click **Send** to distribute your survey through email. You can also save a draft version and send it later.

Note

You can add up to 1000 email addresses per batch in an email campaign i.e. you can send 1000 emails at a time.

To search if a Zendesk contact has answered your survey:

Click **Recipients** and select **Search Recipients**.



The screenshot shows the 'RECIPIENTS' tab in the Zoho Survey interface. At the top right, there is a '+ CREATE NEW' button. Below the tab, there is a search bar labeled 'Search Recipients' and a filter dropdown set to 'Unopened'. The main content is a table with the following data:

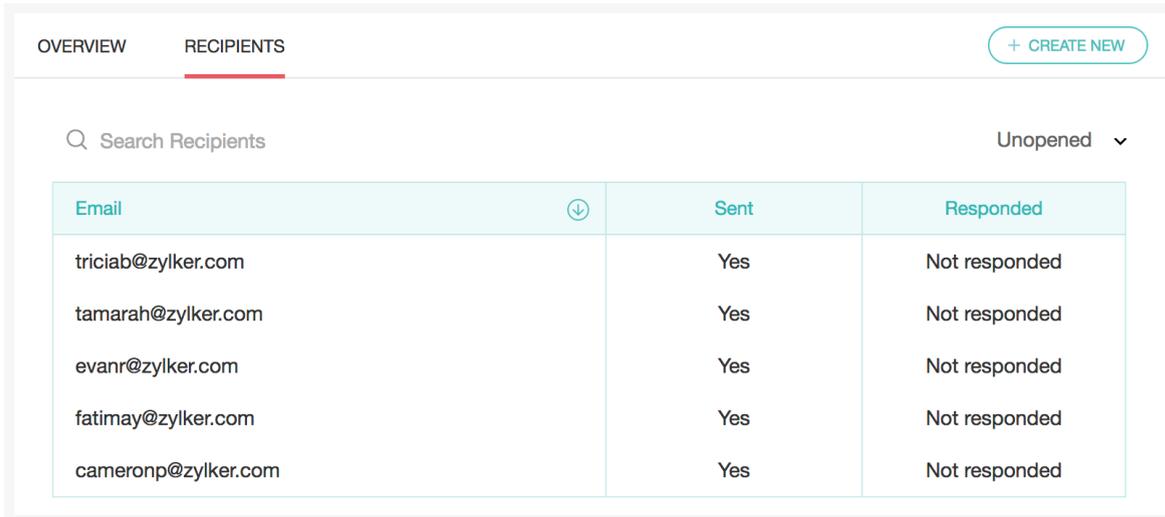
Email	Sent	Responded
triciab@zylker.com	Yes	Not responded
tamarah@zylker.com	Yes	Not responded
evanr@zylker.com	Yes	Not responded
fatimay@zylker.com	Yes	Not responded
cameronp@zylker.com	Yes	Not responded

To filter your recipients:

You can filter your recipients based on the following parameters:

- All recipients
- No responses
- Partial responses
- Complete responses
- Disqualified responses
- Opened
- Unopened
- Unsubscribed
- Bounced

- Not sent
- Failed



The screenshot shows the 'RECIPIENTS' tab in a Zendesk interface. At the top, there are tabs for 'OVERVIEW' and 'RECIPIENTS', and a '+ CREATE NEW' button. Below the tabs is a search bar labeled 'Search Recipients' and a filter dropdown set to 'Unopened'. The main content is a table with three columns: 'Email', 'Sent', and 'Responded'. The table contains five rows of recipient data.

Email	Sent	Responded
triciab@zylker.com	Yes	Not responded
tamarah@zylker.com	Yes	Not responded
evanr@zylker.com	Yes	Not responded
fatimay@zylker.com	Yes	Not responded
cameronp@zylker.com	Yes	Not responded

To remove Zoho Survey from your Zendesk account:

1. Log on to your survey app within Zendesk.
2. Click the **Remove Integration** icon on the top right corner of the home page.

By merging Zendesk with Zoho Survey's email distribution, businesses can effortlessly gather feedback, improve customer support, and make informed decisions. This powerful integration enhances overall customer satisfaction and strengthens client-company relationships—all from a unified platform.