

Using Tags in Outlook

Guidance for embedding your Tags as part of your email signature

Introduction

Hello! If you have a Tag ready to go, you will want to put it in a place where it will be seen. Luckily this is quite straightforward. You can use our website to copy the information for your Tag, and then paste it into the relevant place.

By the end of this guide you will have learnt where to go to download your Tags, how to select the language you need for your respondents, and how to set up your Outlook email signature to display your Tag.

Where to download your Tag

When you login at my.inspirometer.com you will arrive at your **Dashboard**—the home page of your Inspirometer account.

Look for the **main menu** on the left-hand side, which has 'Dashboard' at the top, highlighted to display your current location.

In this menu, click '**Tags**' and then in the sub-menu that opens, click '**List Tags**'. The List Tags page will display all of the tags that are currently associated with your account.

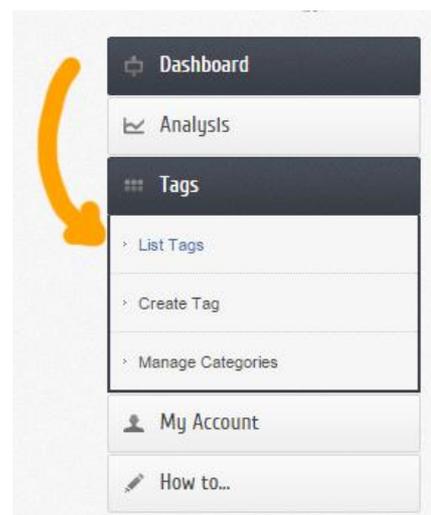
Pick the Tag that you want by finding its name in the 'Title' column.

Then, look along to the 'Actions' column on the right-hand side, where you will see a green **Download icon** that looks like this:



What is in this guide ...

- Where to download your Tag
- Selecting the type of Tag
- Selecting the required language
- Getting a copy of your Tag
- Setting up an Outlook signature



Click the green Download icon to go to the Tag download page. This is where you will obtain a copy of your Tag!

Summary:

- From your Dashboard, go to 'Tags' -> 'List Tags'
- Find the Tag you need and click
- This will open the Tag Download  load page

Selecting the type of Tag

The two most common types of Inspirometer Tags, are the clickable 'Faces' type, and the scannable QRcode type.

The preferred Tag to display in your email signature is the 'Faces' tag, which will display as a row of clickable smileys below the content of your email, and your correspondent can use it to provide their feedback in one quick and simple click.

To select the Faces on the Tag Download page, select 'BASIC TAGS' or 'ADVANCED OPTIONS' and then below that, select 'FACES' (these will actually already be selected by default).

If you are creating an 'Outlook' signature, leave the 'EMBED IMAGES' checkbox **unchecked** as embedding images can create issues with Outlook.

If you wish to encode information into your Tag, such as the email subject, or topic, you can do this in the

Summary:

- Select 'BASIC TAGS' or 'ADVANCED' -> 'FACES'
- Leave 'Embed Images' unchecked.



Selecting the Language

You may need to change the **language** of the response page. The response page is the screen that your respondents will see after they have clicked on your Tag.

By default, the language is English.

As you can see in the screenshot below, there is a language **dropdown menu** within the Tag Download page.

'code' fields under 'ADVANCED OPTIONS' — whatever data you type into the codes will be carried over into the response. This is very useful in CRM situations where the codes can be field data placeholders which are updated by the CRM database. You may need to get your IT function to help you with this.

Now you have selected the type of Tag that you want, and you are almost ready to download it.

Just click to open the menu, scroll through the list, and click to select the language you require.

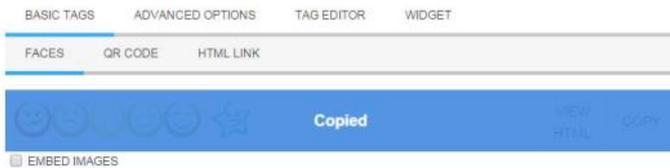
Summary:

- Need to change the response-page language?
- Select language from dropdown menu on the Tag Download page, before you download the Tag

Getting a copy of your Tag

Now that you have the type and language of the Tag configured to your requirements, all you need to do is click the **'COPY'** button.

This will copy the Tag information to your clipboard, and the box will flash blue to show you that it has been copied.



Note: On some browser/security settings the 'COPY' button may fail. If this happens, simply drag your mouse cursor across the faces to select them and use the ctrl-c shortcut to copy them to your clipboard.

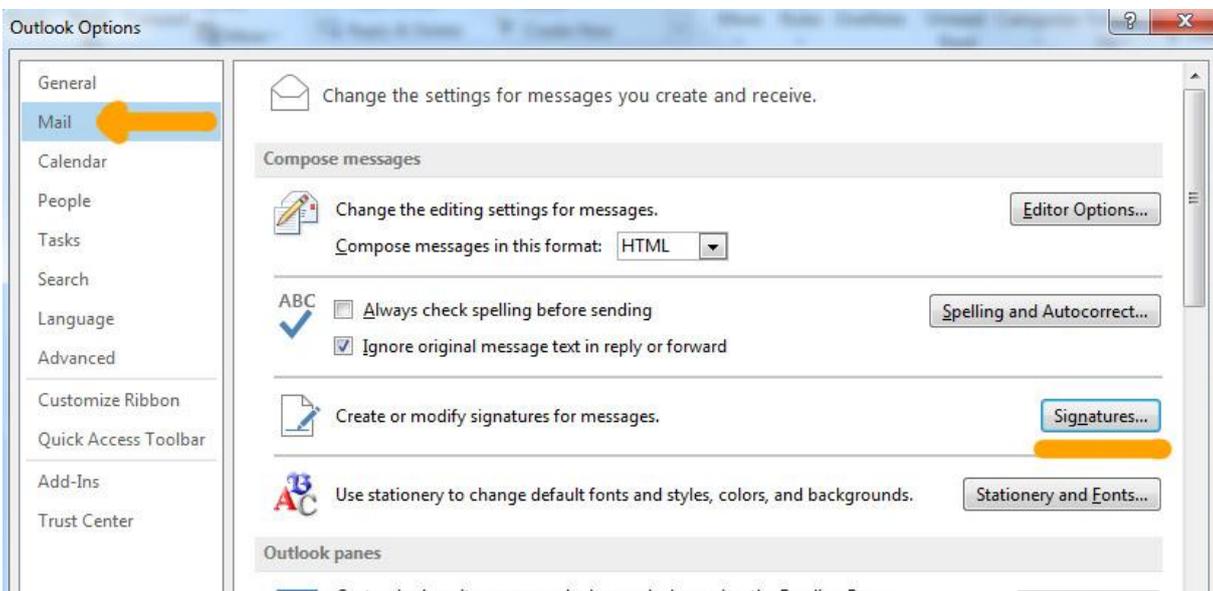
You are now ready to 'Paste' the copy of your tag into your email signature so that your correspondents can provide you with their feedback.

Setting up an Outlook Signature

First, Open up **Outlook** and click **'File'**.

In the menu that opens, click on **'Options'**, and a separate Options window will appear.

In the left-hand panel are several categories of options. Look for **'Mail'**, which should be the second one in the list, and click it:



Now, on the right, you're looking at the Mail settings for the messages you send and receive. Within that window you will find a button called **'Signatures'**.

Click this to open the Signatures menu:



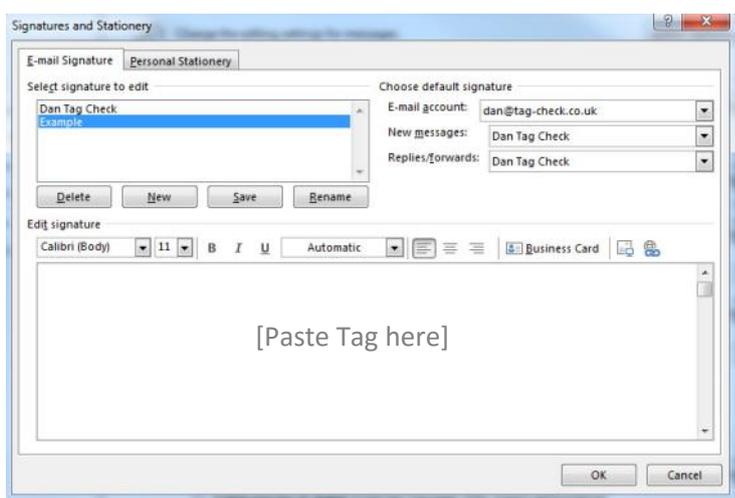
If you don't already have a signature, just click the **'New'** button and enter a name for your new signature.

If you do already have a signature, you can easily add the faces into your current one, or you could create a new one if you prefer.

Once you have your chosen signature selected, go down to the **'Edit signature'** text-entry area and right click to **'Paste'** the information you copied from our website. You can also just use the keyboard shortcut to paste: Ctrl-V.

Your faces tag will appear and now you are free to write anything else you'd like to have in your email signature—for instance, your name and contact details.

You might also like to write a question or a request above the faces, to prompt your correspondent to click one.



And you're almost done! Make sure you set your new Tag signature to be the default signature for New Messages and Replies that you send. You can select this in the top right of the Signature settings window.

Click **'Save'** and then **'OK'**, and now your Tag is ready to receive your first piece of feedback.

Summary:

- Open Outlook -> 'File' -> 'Options'
- Select 'Mail' and click 'Signatures' button
- Choose the signature to add your Tag to
- Paste (Ctrl-V) the Faces you copied from the Tag Download webpage.
- Add any other signature text
- Set this signature to be your default

Was this helpful?

Single click feedback:



If this document has been circulated to you as part of a corporate implementation of the Inspirometer ...

Your internal support contact is ...

Name: _____

Email: _____

Phone: _____