The functionality will be included in all Clicktools licenses from Sunday 6th February. The application will be unavailable for a maximum of 15 minutes at 7am GMT to allow the upgrade to take place.

Introduction

The start of 2011 sees the culmination of a lot of behind the scenes effort to upgrade Clicktools. This document outlines some new functionality that has been released in the last few weeks and details new functionality that will be **included in all accounts w/b 7th February 2011**. The highlights are:

- *Drag and drop 'WYSIWYG' builder interface*
- *New layout engine including*
  - *Question 'groups' for flexible content display*
  - *Additional question functionality including advanced validation*
- *Improved CRM synchronization*

Drag and drop 'WYSIWYG' interface

From the end of January Clicktools Builder will provide a 'What You See Is What You Get' (WYSIWYG), drag and drop interface. You can select where new content is inserted, drag content to a new position and easily make a question Required or Hidden. Layout changes are reflected on the screen whilst a 'Collapse All' option provides an easy way of editing large surveys and forms.

New layout engine

The new layout engine is a more powerful, flexible and efficient way of displaying content.

Important note: The new layout engine will only be applied to new content. If you wish to transition existing content to the new layout engine then you will need to copy the content to a new instance which will result in a new survey link which will need to be replicated in your deployment environments.

If you **must** maintain existing content with the same link then please raise a case with Clicktools support who will 'switch' the old survey to the new layout engine. Please be aware that switching to the new layout engine may have display consequences, especially if you have used html/css in an Advanced template. We strongly recommend you test some completely new content with your existing template to understand these changes as once content has been transitioned to the new layout engine it cannot be switched back.

The new layout engine will enable Clicktools to progressively enhance its Builder capability. The initial improvements add the following capabilities:

- ### Question 'Groups'

  Groups are an exciting new way of presenting content. By placing questions and text together in a group you can control how exactly the content is displayed. Want everything on one line? That's ok. Want three questions on one line, four questions on the next and then one question with some text? That's fine too.

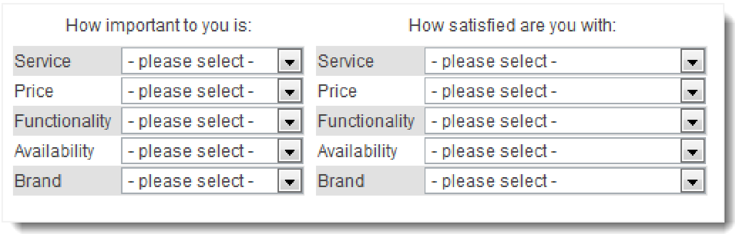
  Groups enable you to determine where exactly you want the line breaks in the content. Further, Groups can be defined as 'Tables' meaning that all the corresponding elements are aligned or 'Flow' which means that elements are simply placed one after the other using as much width as allowed by a template.

  Sound complicated? Well, perhaps the best way to look at this is to look at three common examples.

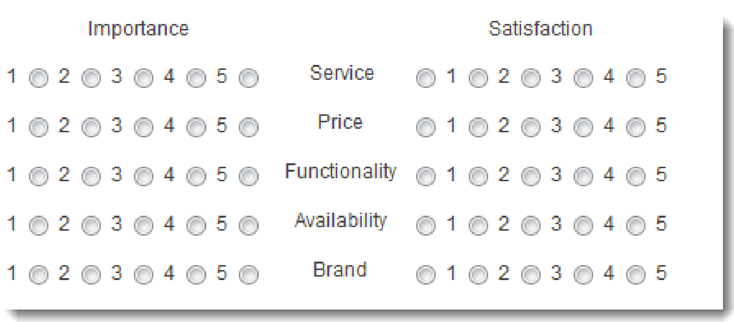
The first is presentation of 'Importance Vs Satisfaction' questions in a survey. The second is an address or sign-up page and the third is a Madlib form.

Importance Vs Satisfaction

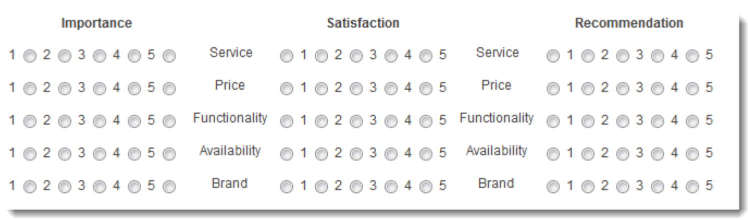
This technique is used in surveys to ask a respondent to measure two factors against the same set of scenarios. A simple example using two multi-drop down questions placed in a Group (Flow or Table layout) is provided below:



The beauty of this example is that different text scales are used for Importance and Satisfaction (e.g. 'Very' etc. for Importance and 'Completely' for Satisfied).

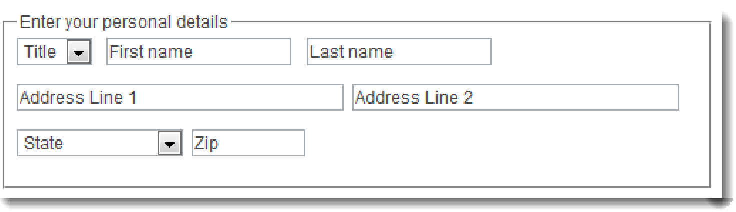


Another example shows the same numeric 1-5 scale for both measures. Extending this further, you could provide another set of options around, for example, recommendation…



Personally I wouldn't recommend this but the purpose here is to show the flexibility of Clicktools in displaying content, not debate the rights and wrongs of survey design.

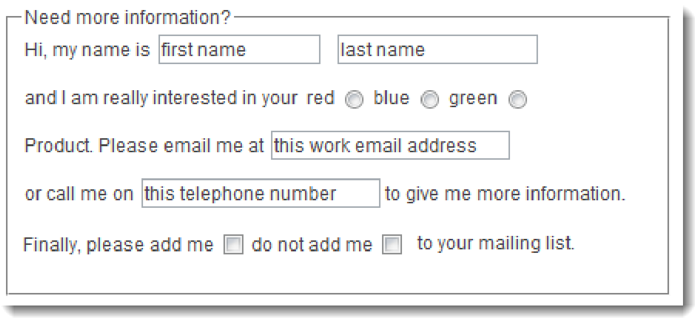
Moving on from surveys another great example of Question Groups is to provide complex sign-up or stay in touch forms. The example below combines Drop down and Text questions in a Group to ask the respondent to provide their US address.



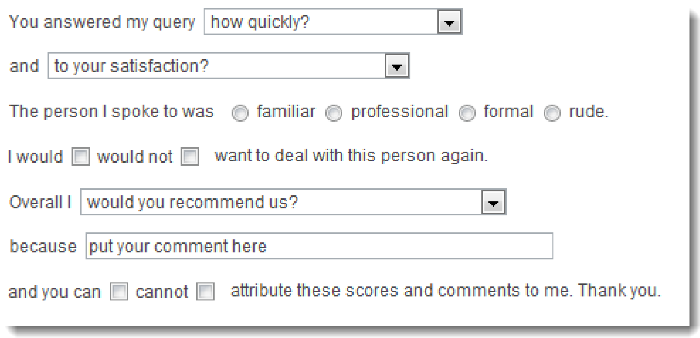
Usefully, we have used a 'Fieldset' to outline and give a title to the group, used 'Watermarks' to prompt the user for the correct information. (e.g. First name and Zip) and selected US Zip 'Validation' to ensure only a correct US Zip code is entered.

Finally, we can extend this approach to provide the third and final example (and my personal favorite) - Madlib forms and surveys.

Everyone knows what a Madlib is right? Well, the new Group layout enables you to use Clicktools in exactly this way. For example, let's say we want people to ask for more information. Now, Clicktools can be used to easily create exciting madlib forms and surveys...



In the first example we combine Text, Radio and Checkbox questions in a Fieldset to create a fully validated sign-up form.



We could extend this format could be used to collect survey responses. How about a madlib closed case survey?

These three examples are just some of the ways that Groups can be used. Please follow Clicktools blog, Facebook pages or Twitters to keep up to date with more applications.

Whilst outlining Groups we introduced some other new features that are contained in the new layout engine. These are:

- Validation

  Currently, Clicktools uses question types to validate information. For example, a 'Numeric' question type allows a respondent to only enter numbers. The new release enables a User to 'validate' any 'text' entry (in a Text or Multi-text question).

  On a Text question a Validation tab will appear that enables the user to select from one of a series of pre-built validations (such as Email Address, Zip Code etc.) or enter a custom validation. We will be adding more pre-built regular expressions but you can also build your own custom expressions, even using a pre-built expression as a starting point if required.

  When you are collecting many pieces of information of the same type (e.g. multiple email addresses, currencies) you can also apply validation to a Multi-text question. In this instance the same validation is used across all fields, meaning you only have to specify the validation once.

  The use of custom expressions is especially useful to Salesforce customers as Regular Expressions can be in Field validation. By allowing custom expressions Clicktools allows you to completely match the validation in Clicktools forms to Salesforce fields. The result?

Only valid data can be entered and reduced likelihood of synchronization failure and SPAM.

For those wanting to find out more about regular expressions, the two most useful resources we have found are www.regular-expressions.info and www.regexlib.com.

For those who prefer something a little more heavyweight or need something to place on their coffee table to impress friends, Jan Goyvaerts (regular-expressions.info) was also joint author of the 'Regular Expressions Cookbook' which is available from Amazon and other good and bad bookshops. (Unfortunately, at the time of writing a Kindle edition is not currently available ☹).

- Layout
  For each individual question, the new layout engine allows:

  - Question text positioning
    Question text can now be placed above, below, left and right of the respective question choices.

  - Question choice positioning
    For all questions (except multi) choices can be placed above, below, left and right of the respective selector (radio button, checkbox etc.)

  - Show/hide text
    Question text and help text can be hidden on an individual question basis. This enables you to combine questions together (as per the madlib examples) but still see the question text when you analyze results in Clicktools.

  - Show/hide numbers
    Previously, numbering was handled within a template. Now, you can override the template setting to show or hide question numbering on an individual question. If you hide question numbering, automatic numbering will continue on the next numbered question.

  - CSS styling
    Each question can be tagged with its own CSS class. This CSS class can then be referenced in an Advanced Template, allowing you to apply your required styles to one or more questions.

Improved CRM synchronization

- Auto-delete responses after synchronization
  In the Personal product, as soon as a response has been synchronized with CRM it is automatically removed from Clicktools database. We are pleased to say that this functionality will now be available as an option in all editions.

  To automatically delete responses after they have been synchronized you simply need to check the *"Delete responses after successful sync"* option once Manual or Automatic synchronization has been selected.

The next three improvements work together to drastically improve the way that you can use Clicktools to create or update information in CRM.

- Find object based on information provided
  The Actions available in a Mapping now include a 'Find' option. This enables you to select an answer to a question and use Clicktools to find some information in your CRM.

A good use case is using an email address provided in a Web2Case form to find a Contact within your CRM. You could then add the newly created Case to the found Contact.

Another use case is a form that registers Partner referrals. Each partner would enter their own unique Partner Id which would be used to find their Account (or custom Partner object) which would be used to register a newly created Lead or Opportunity.

- Select object found/created/updated if more than one
  When you use 'Find' or 'Update Existing' actions previously Clicktools simply failed if it found more than one object matching your chosen criteria. Now, you can choose between the first created, last created or last modified to treat as your chosen object. You can still (if you prefer) treat this as an Error.

  This is particularly useful as previously if you had duplicates (and let's face it who doesn't?!) you had to manually go and fix the dupe or ignore the error. Now, you can be sure that the information is successfully passed in to Salesforce.

- Set conditions on mapping success or failure
  Simply, this enables you to add a condition based on whether a mapping section is completed or not completed.

  The easiest way of explaining this is to provide a common use case. Most people are familiar with Web2Lead forms. As useful as these forms are there is a danger of simply adding duplicate leads. You could, for example, already have a Lead in the database. Alternatively, you may already have a Contact. This feature enables you to check what exists in CRM and take appropriate action.

  For example, the first thing to check would be whether you have a Lead. Using the new functionality you could check to see whether a Lead was found (Completed) or not (Not Completed).

  If you have a Lead (i.e. the mapping is Completed) you could add the existing Lead to a Campaign.

  If no Lead is found (i.e. the mapping is Not Completed) you could then choose to search for a Contact. If a Contact is found (i.e. If the Find Contact mapping is Completed) you could link an activity or add that contact to campaign.

  Alternatively, if no contact (the Contact mapping is Not Completed) you could create a new Lead.

This triumvirate of features drastically improves your ability to manage which information is created and updated. Look out for more examples and live webinars with the Clicktools team by following Clicktools blog, Facebook pages or Twitters.

- Enhanced Control panel available in Sugar CRM and Oracle CRM On Demand integration
  Customers using the Salesforce integration will be familiar with the Enhanced control panel. Up until now, customers using the SugarCRM and Oracle On Demand integration have had to do with the standard control panel. Whilst Personal Edition will continue to use the standard control panel, Personal+ and above (for SugarCRM customer) and Team and above (for Oracle customers) will contain the Enhanced control panel.

  The Enhanced control panel provides greater visbility and control of your synchronization status. The panel identified how many synchronizations are awaiting synchronization, how many are being retried, how many have been successful and how many have failed. For the failed responses you can view individual errors as well as edit the response to correct the failure and re-synchronize.

And, last but not least

- Publish to PDF
  Is now available in Chinese (Simplified and Traditional), Greek, Gujarati, Japanese, Korean, Russian, Thai and Ukranian.