What better way of getting to know how to use Clicktools for AppExchange than building a very useful little form to enable individuals to 'opt-out' ...

We are going to walk through the steps required to build a Global opt-out form. This form will provide a link that you can use in all email communications to Leads and Contacts (and custom objects with 'individual' information in).

With a little more work, this form could easily be adopted to provide an opt-in confirmation form or be expanded to provide opt-in/outs for multiple communications (more on these at the end of the document).

You can see an example opt-out form here:
http://www.clicktools.com/survey?iv=b611329eb33557

This example form is included in your 'Library' folder in your account, but for the purposes of teaching you what's involved let's go through the stages one by one. You will need to go through similar steps for each survey/script/form/landing page you want to deploy.

When you have finished you will have:

1. A link that you can include in any email sent from Salesforce to Contacts. (You could also include this in any 3rd party email tool also).

2. A page that asks the individual to confirm their opt-out.

3. An automatically updated 'Email Opt Out' field against a Contact in Salesforce.

This document uses traffic lite coloring to identify different types of information:

Important information you need to master

Useful hints and tips about Clicktools

Steps needed to complete this Activity

If you get stuck, please first look at the Tooltips (?) which gives useful information about each option in Clicktools. Second, click on the 'Help' link which will take you to relevant help about that topic. If you still cannot find the information you are looking for, click the 'Still Need Help' link in the top right hand corner of the Help window and complete the form. This will create a case with our support team and someone will get back to you.

This exercise consists of 84 steps and should take you 15 minutes to complete.

Step 1: Building your opt-out form.

Create our form/survey
The first thing we need to do is create a new survey. Clicktools call everything a survey even though you may be building a form or landing page (having everything on the menu would take up a whole lot of space!)

1. Click the Surveys menu
2. Click the Create New button
3. Enter a name such as 'Global Opt-out'
4. Put in a description to help other people understand what this form/survey does
5. Choose a folder for your form
6. Select any other languages that you will be translating the content for by moving the languages from right to left using the arrows
7. Click Create.

A couple of items where mentioned in that last point that we don't want to deal with now, but are worth highlighting…

What is a folder? A folder is one of the ways that Clicktools manages user access. A user has access to one or more folders. If they have access to that folder then they can see all surveys/forms in that folder. If a form is not allocated to a folder it is placed in an 'Unassigned' folder and everyone can see it.

What about Languages? Clicktools can run surveys in any language, including those using double byte character sets. When you select another language Clicktools creates a 'placeholder' for this language. The master content will be used until you enter translated text.

Additional tabs will appear enabling you to enter the content for the opt-out form.

8. Click the Questions tab.

Identifying the Salesforce Contact/Lead.
The first thing we need in our form is question that tell Clicktools who is opting-out. For this we will use a text question that will be auto-populated from Salesforce.

9. Click the Add Question button
10. Select Text from the dropdown list
11. Click Create
12. Enter "ID" in to the Text area
13. Click Apply.

Let's hide the question!
This will add the question to the form. Clicktools will only be using this information to talk to Salesforce so we don't need to show this information to the person opting-out.

14. Select the Hidden checkbox to the right of the question
15. Click Apply
16. The question will now turn light grey.

Adding the all important opt-out question
We now come to the important part. We need a way of getting someone to confirm or cancel their opt-out.

For this, we will use a Checkbox question with one option that the user will check to confirm their opt-out.

17. Click the Add Question button
18. Select Checkbox from the dropdown list
19. Click Create
20. Enter the text you wish to display above the option, something to tell the individual what you want them to do. Look at the example if you need some suggested text.
21. Enter the option text, this will be displayed next to the checkbox so should be something along the lines of "I confirm I am opting out of all communications".

Adding some final text
The next thing we need to add is some text to describe what the person needs to do to complete their opt-out.

22. Click the Add Text button
23. Enter some meaningful text for a Title (only you will see this) such as 'Confirmation text'
24. Enter the text you want
25. Click the down arrow to show/hide a formatting bar which enables you to change fonts/colors etc. The Source button enables you to enter custom html/javascript
26. Click Create.

Our form definition is now complete. You can see it in a raw form by clicking the Preview button.

The next step will be to build a template that will enable you to present your brand…

Step 2: Building a branded form.

Clicktools separates content from presentation. Presentation is defined using Templates that can be re-used across multiple forms and surveys. This has tremendous advantages over alternative approaches as it means that you can completely reflect any brand changes quickly and easily without having to amend each survey/form separately.

Add a logo
The first thing we will do is upload a logo so we can add it in to the survey.

27. Click the Templates menu
28. Click the Images tab
29. Click the Upload New Image button
30. Browse for a suitable image (must be jpg, gif or png and as small (in file size) as possible to ensure a fast download and click OK.

Use the logo
Now the image is available in Clicktools; we use it in a simple template.

31. Click the Presentation tab
32. Provide a name (e.g. your company name)
33. Use the drop-down lists on the right hand side to place your image in the required place.
34. Select fonts and colors as required
35. Set 'Numbers' to 'None'
36. Click Apply

About little more about templates…

Clicktools can be used to build basic or advanced templates. A range of controls can be set using the drop-down options including fonts, sizes, progress bars, using images instead of buttons, language selectors etc. Tooltips (?) provide a simple explanation of each feature whilst the on-line help provides more details.

For more advanced users and to match any branding guidelines we enable individuals to control the html. By selecting the Advanced option you can enter any custom html. We would recommend that you use this approach whenever possible to ensure a smooth and consistent user experience for your customers.

You now have a simple template. We will now bring our survey content and this template together in what Clicktools calls an "Instance".

Step 3: Creating an instance.

This step is where we combine the survey content (i.e. the questions) with the presentation template to create what Clicktools calls an 'instance'. Sure, it's a bit of a geeky name but it serves its purpose and hides a particularly powerful feature of Clicktools.

Clicktools enables you to run more than one instance of a survey! You can run the same survey for different countries or division/groups using different templates and the combine the answers in to one overall survey to compare and contrast as you desire.

Whether you choose to run multiple instances is a conversation for another day but, **you will need a minimum of one instance to run a survey**.

To create an instance is quite simple…

37. Click the Surveys menu
38. Click the 'Create Instance' link
39. Enter a name
40. Set Salesforce to 'Automatic' and enter the Salesforce.com credentials you want to use to modify information in Salesforce.

About entering credentials

Clicktools has been certified by Salesforce.com as a safe place to store your credentials. They are encrypted and cannot be seen by anyone.
When entering credentials for synchronization, the user must have:

- Full access to all objects/fields you wish to create/update
- API access

We just need to set a couple more details…

41. Select the Template you defined in Step 2.
42. Set Multiple Responses to Yes
43. Click the 'Create' button
44. The page will refresh and contain a Survey URL link.
45. Copy this link (click right mouse button and select Copy Link Location, or similar (MAC users – you know what to do!) as we will use it in the next step.

About survey URLs
Clicktools provides a unique link for every survey you create and each URL has a combination of digits and letters at the end.

YOU MUST COPY THE LINK CORRECTLY. **DO NOT CLICK THE LINK AND COPY** WHAT APPEARS IN THE BROWSER WINDOW.

This will cause an error. For security reasons (e.g. to stop form spamming), Clicktools changes the link once it is clicked on and this, new link, must not be used.

Step 4. Creating the email link in Salesforce.

Ok, the opt-out form is ready so there are only two things left to do. We need to define how Salesforce will be updated when the opt-out is submitted by an individual but first we need to create our link that we can use in a Salesforce email.

For this, you will need the Survey URL you just copied. Remember, the URL will look something like this: 'http://www.clicktools.com/survey?iv=b611329eb33557'
(This is a link to the example opt-out form).

If you decided to use this link you would paste it in to existing templates, but for the purposes of explanation and testing we are going to build a simple text email template that contains just the link for the opt-out.

If you have created a Salesforce email template before these steps will be second nature to you. If you have not, please refer to Salesforce Help if you get stuck (please don't ask Clicktools support questions on Salesforce – you may get a terse response!).

Create a simple text email template in Salesforce

46. Click Setup
47. Click 'Email' on the left hand side
48. Click 'My Templates'
49. Click the New Template button
50. Select Text
51. Click the Next button
52. Keep the template in your 'My Personal Email Templates' folder
53. Mark the template 'Available for use'
54. Enter a name, description and subject.

Build the Opt Out link
This uses the survey URL and a salesforce merge field to identify the contact that is opting out.

55. Paste the link copied in step 3
56. Add '&q1=' to the end of the link
57. Select the Contact ID merge field in Salesforce
58. Copy and paste this value (it will be something like {!Contact.Id} after the '='
59. Click the Save button.

Passing information from Salesforce to Clicktools is done in the following way:

We use **'&qX=N'** at the end of the survey URL to pass information in to Clicktools where **X=the question** in your survey you wish to answer and **N=the answer** to the question.

In this example, the first question is a text question for the Contact Id. So, we will add '&q1={!Contact.Id}' to the end of the survey URL.

Using our example URL, your complete link should looks like this:

http://www.clicktools.com/survey?iv=b611329eb33557&q1={!Contact.Id}

When the merge template is actually used the {!Contact.Id} will be replaced by the real value for the individual you send the email to. When the individual clicks on the link this value will be passed in to Clicktools and this will allow Clicktools to update the Email Opt Out field for the correct contact.

You can add as many combinations of this format to the end of the URL to populate as much information as you need and any question type can be answered. You can find out more detail in the on-line help which provides detailed explanations links to webinars with more detailed examples.

Step 5. Building the mapping in Clicktools

The last step in the process is to define what Clicktools will do with the information it receives. In Clicktools this is called a 'Map'. In simple terms, this matches questions in Clicktools to fields in Salesforce.

Let's build a map for the Opt Out.

To build a map…

60. Click the 'Salesforce' menu in Clicktools
61. Click the 'Map' link.

Clicktools will now build a list of all the information available to you. You will only see objects and fields allowed by your security profile.

You will see a dropdown list containing all the types of information you have access to in Salesforce. This will contain standard things like Accounts and Contacts but also any custom objects created. Custom objects will be indicated by a '__c' at the end of the name. If you add any custom objects and/or fields after clicking the map link you will need to refresh the list by logging out and back in to Clicktools.

Tell Clicktools what information will be affected and how.

62. Select 'Contact' from the list
63. Select 'Update Existing' from the 'Action' dropdown
64. Choose 'Contact ID' in the left hand dropdown and 'Q1. ID' in the right hand dropdown

About creating and/or updating

Clicktools allows you to Create New information, Update Existing information or Update/Create (also known as upsert). If you specify Update Existing or Update/Create you must tell Clicktools how the correct information will be identified. In the above action we are telling Clicktools that the ID we have passed from Salesforce is the information to use to identify the correct Contact record.

You don't have to use an ID and you can use any question to identify the Salesforce record but this must return a unique record. If Salesforce tells Clicktools there is more than one record with this piece of information the synchronization will fail.

Map fields to questions
We now need to select the fields and match it to a question. The only field we will be updating is the Email Opt Out field

65. Select the 'Email Opt Out' field from the left dropdown
66. Click the 'Add' button
67. Select 'Fixed Value' from the right dropdown
68. Enter 'True' in to the text area

What's this 'Fixed Value'?

As well as using questions to pass information in to Salesforce, Clicktools also allows you to use several special fields. These include links to the completed survey, the date and datetime the survey was completed and a Fixed Value.

Fixed Value is important for two reasons:

a) You may **need** to pass a different value in to Salesforce than the one selected on the form.

The Opt Out is a great example. A Salesforce 'checkbox' field can only be updated using the values True or 1 and False or 0. Clicktools will, by default, pass the text presented on the form to Salesforce, so in this case we would not be able to update the

b) You may **want** to pass a set value in to Salesforce or a value that is different from the one on the form.

An example may be that you want to enter a value for a Salesforce field that you do not have a question for (e.g. a Status or Lead Scoring field). Alternatively, you may want to change text to a number (e.g. pass 10 instead of Extremely Likely). You can use Fixed Value in conjunction with Mapping Conditions to do this.

Only set the Opt Out if the checkbox is ticked

69. Click the 'Add Condition' link on the right of the Email Opt Out mapping element. A new pop-up window will appear
70. Select Q2 in the dropdown
71. Click the 'Add' button
72. Click the 'Apply' button to close the pop-up.

An explanation and more details about mapping conditions

What you have just done is ensure that the Opt Out field against the Contact is only set if the question on the Opt Out form is ticked. If the person has removed the tick then they will still be opted in so we don't want to change the form.

Setting mapping conditions like this enable you to control whether whole mapping sections or individual mapping elements happen or not. They are similar to workflow rules in Salesforce but you do not need Salesforce Administrator privileges to set them.

Other examples of mapping conditions include:

- Creating a case if someone scores less than 10 on a satisfaction survey
- Changing a Status of category of a lead according to the answers given on a web2lead form.

The mapping is complete

73. Click the Apply button to save the mapping

Step 6. Test

You are now ready to test the Opt Out.

Send the email from Salesforce…

74. Find a suitable test Contact record in Salesforce
75. Click the 'Send An Email' button in the Activity History
76. Select your saved 'Test Email Opt Out' template
77. Click the 'Send' button

Check your email and click the link

78. Go to your Inbox
79. Click or copy and paste the link in to your browser window.

About links in emails

Unfortunately, not all emails treat text links in the same way.

Some will recognize the link and create a hyperlink which you can click on whilst others will break a link across multiple lines. If the link is broken the whole link will need to be copied and pasted in to the browser window. Example workarounds are:

a) Include the link in a html email as a hyperlink.
b) In a text emails include the whole link between '<' and '>' and then place some supporting text such as 'If you cannot click on the link please copy and paste everything between the < and > in to your browser window' in the email.

If someone clicks on an incomplete or corrupt link then Clicktools will display an 'Invalid URL message'. This message will also be displayed if a survey is closed or has been deleted.

Submit the form

80. Check the checkbox (to Opt Out)
81. Click the Submit button
82. Go back to your Contact record
83. Check the Email Opt Out field
84. It will be checked

Congratulations! You have built a working Global opt-out form. If the checkbox was not updated, something will be wrong. Check the following:

1. The form has a hidden question to take the contact ID
2. The Contact ID is being passed correctly in to Clicktools from the Salesforce email
3. The mapping is set up correctly.

Master these 3 steps and everything is possible. If you still cannot work out what is wrong, please contact Clicktools using the 'Still Need Help' form.

Moving on from simple Email Opt Out

There are several ways in which this form can be developed further. The most popular are (from simple thru to complex):

Including the link in 3rd party email tools

If you use multiple email tools (or even one) Salesforce ceases to be the Opt Out master. This may mean that you are emailing people even if they have opted out. You can include this link in all email correspondence to ensure Salesforce is the Opt Out master:

- Change the link and Salesforce merge field on the end of the URL to reflect the merge field from your email tool.

Automatically populate Opt Out question on form

If you want to allow people just to click Submit on the form to opt-out you can use the '&qX=N' format to automatically answer the Opt Out question. To do this:

- Add &q2=1 to the end of the URL

Opt In confirmation

You can use virtually exactly the same form as a 'Confirm Opt In' capability. An example application of this would:

- Use a custom Email Opt In field against a Contact
- Change the Checkbox question text to the required Opt In text
- Change the mapping to update the new custom Opt In field rather than the standard Email Opt Out field.

Lead/Custom object Opt Out

Salesforce does not provide a standard Lead Opt Out field but most Salesforce customers will add a custom field. You can use the same form to work for leads against a custom field or indeed any object with an Opt In/Out field. To do this:

- Build a new link to pass in Lead ID to the survey
- Add a section to the mapping to update the Lead
- Use two conditions (one against each of the two mapping sections) to update the Contact record or update the Lead record. Check that the hidden ID question (Q1) contains '003' to update the Contact and '00Q' to update the Lead record.

Subscription management

Most organizations need/want to maintain more than one Opt In/Out. For example, you may require different Opt In/Outs for Newsletter, product updates, partner news etc. as well as allow Contacts (or Leads or anyone) to manage their Opt In/Out settings at the bottom of any email. This is more complex but the basic steps are:

- Build custom fields (checkboxes) for each subscription Opt In/Out
- Build an additional (numeric) formula field for each custom subscription field with a value of 0 (unchecked) or 1(checked). Hide these fields on the page layout.
- Add the required options to the Checkbox question
- Use the 'hidden' formula fields to pre-populate the questions in the form using the &q=X format. The format will be &q2={!hiddenfield}|{!hiddenfield}|{!hiddenfield} where {hiddenfield} is the merge field for each numeric formula field
- Add mapping elements at the start of the mapping and use a Fixed Value to set every checkbox field to False. No conditions are necessary, you just need to set every field to False as this allows the individual to Opt (back) In to previously Opted Out fields. If this doesn't make complete sense – don't worry, it does work!
- Add a Fixed Value mapping to set each subscriber field to True if the checkbox is selected, using a condition against each mapping element to choose the correct subscriber option.
- Set the mapping to set the custom subscriber fields to True when the relevant checkbox is selected (using the same condition as in this exercise).

Clicktools can provide professional services to assist in the building of these applications. Please contact your Account Manager for more information.