

This document outlines the new functionality and features available in Clicktools from 1 Feb 2010.

The primary addition is enhanced email capability including full wysiwyg design of emails, organization emails, bcc/compliance capability and full bounce/delivery management.

Additional features added on (or soon after) 1 February include automatic deployment of secure and personal URLs, 'on demand' rebuild of the CRM cache when mapping information and form upload.

Email deployment

1. Email metering

Currently, Clicktools Principal, Architect and Organizer users are allocated 10,000 email invites per year. In line with the new capabilities email tokens will be grouped at an organization level and monitored. Emails will only be sent by Clicktools if there are sufficient organization tokens in place to send the complete batch of emails. System generated emails (such as Alerts etc.) are excluded from the metering. Additional email tokens are available in blocks of 10,000 (\$150/£99) and are valid until the organization renewal date.

2. Track email usage and activity

Principal users will be able to see the number of email tokens available to them in Administration | License tab and the number of emails used against each instance in the Administration | Activity tab.

3. Organization wide email addresses

Principal users can now set up 'organizational' email addresses to enable users to send emails from email addresses other than their own. Organization emails must be verified prior to use. Once verified, emails can then be sent by appropriate users using any of the pre-entered organizational email address. Organizations can create up to 5 organization wide email addresses with additional blocks of 5 email addresses available for \$150/£99.

4. Email address validation

From the new release, only verified email addresses will be allowed to send emails. All existing email addresses in the system are pre-verified but when an existing email is changed or a new user or organization wide email address is added, Clicktools sends an email containing a link which must be verified (clicked) before the user/organization wide email can be used to send emails.

5. Compliance (BCC) email available

As part of a user's set up, an Organizer, Architect or Principal user may define a compliance (bcc) address. Once defined, the user can choose to send a copy of each and every email (excluding system generated Alerts) to that bcc address. This is very useful when used in conjunction with the 'Email to Salesforce' capability to record activities against information in your Salesforce CRM system.

6. Multi-part (HTML/text) email design and delivery

Clicktools now provides the ability to define and deliver HTML and/or plain text emails. Users will no longer need to hardcode html as a full, switchable editor is introduced. As a consequence, users will no longer be able to create emails at the time of the send - templates must be created and used.

Note: There are many rules and best practices that should be observed when sending html emails. As an example, please click the following link to see what is and what is not allowed when sending html emails to Microsoft Outlook.: <http://msdn.microsoft.com/en-us/library/aa338201.aspx>

7. Full translation of emails

All templates, including the Email Subject, can now be fully translated. When sent to a Clicktools Contact, Clicktools will automatically send the email in the appropriate language (if available).

8. Test email before send

As part of the email template design process you will be able to send an email to your user email address to fully test emails prior to execution. In addition you will be able to send a test email to another user as part of the deployment process.

9. Improved deliverability

Clicktools now enables organizations to choose between 3 settings for email deliverability. The default setting is '*Standard security email mechanisms*'. With this setting 'hard' bounces are managed by Clicktools and the Envelope 'from' address is amended to identify the email as being sent by Clicktools. This is the default selection and a vast majority of customers should not need to change this.

If you are experiencing difficulties sending email to some organizations then you may wish to implement a higher level of deliverability setting. There are two options; '*Enable SenderID*' or '*Use modified From and Reply-to address*'. Both of these approaches should deliver a lower spam score than the standard setting but will affect what the recipient sees in the email. The 'SenderID' setting may result in a 'on behalf of' message in the recipient's inbox whilst the 'Modified' setting shows a no-reply@clicktools email address. Both approaches also manage hard bounces.

What is a 'hard' bounce? A 'hard' bounce is an email message that is returned because the recipient's email address is invalid. This could be because the email address is misspelt or does not exist. Error messages of type 500 are used to identify hard bounces.

In all settings, organizations can choose to copy hard bounces to senders. Soft bounces (temporary errors such as 'Out of Office' indicated by error type 400) are ignored by Clicktools. The effect on the emails from the user perspective is summarized in the following table:

Setting → ↓ Email	Standard [default]	SenderID	Modified
From (what the recipient will see)	User name <user email>	User name <user email> OR noreply@clicktools.com on behalf of User Name [user email]	User name <noreply@clicktools.com>
Return-Path (Envelope From address)	Clicktools	Clicktools	Clicktools
Sender (header)	Not set	noreply@clicktools.com	Not set
Reply-to (header)	Not set	Not set	User name <user email>

You can see more detail about email best practice and recommendations at: <http://www.openspf.org>

10. Improved bounce management

All 'hard' (permanent) bounces will be recorded by Clicktools. Contacts will be tagged and the full bounce error message will be recorded. From that point no emails will be sent to that Contact until the Email address is validated by a user. Admin users have the option to copy bounce messages to the sender's email address.

11. Improved privacy and personalization of links

Currently, there is no tracking of who has been sent a survey in Clicktools and survey links and annotations are completely visible to the recipient. In the new release, if the `survey_url` parameter is contained within an email template, Clicktools will create a Contact and replace the URL and all annotations with a contact specific URL. This enables the user to see who has been sent a survey (and how they have responded) and also 'hides' any URL parameters, removing the ability of the recipient to see or change information contained on the link. If users wish to retain a completely anonymous link then the full link should be included (e.g. <http://www.clicktools.com/go?iv=123456789>) in the email.

12. Improved reminder

The 'Participants' tab against Surveys | Deployment has been replaced by an 'Email' tab. Reminders can be sent easily to each batch of email recipients where completes and bounces have automatically been removed.

Builder

13. Updated text editor in builder

This includes the ability to edit in full screen mode (very useful for large text blocks and landing pages) and include images directly from your Clicktools Image library.

Contacts

14. Improved filters include bounce and email deliverability

Users may now create, save and share advanced filters against Contacts. Filters can combine question results with filters against whether emails have bounced or have (not) been sent in the last X days.

15. Mass update contacts

Users can instantly update a user controlled field of all or filtered contacts.

CRM Integration [Oracle/Salesforce/Sugar]

16. Improved security and personalization of emails [Oracle/Salesforce only]

Previously, the complete survey URL would be visible within an email. Now, if the `#{survey_url}` parameter is contained within an email template, Clicktools will create a Contact and replace the URL and all annotations with a contact specific URL. This 'hides' any URL parameters, removing the ability of the recipient to see or change information contained on the link. If users wish to retain a completely anonymous link then the full link should be included (e.g. `http://www.clicktools.com/go?iv=123456789`) in the email.

17. Instant rebuild of CRM map

Previously, any underlying changes to a CRM meta-model would only be reflected once the user logged out of and logged back in to Clicktools. Now, the user may instantly refresh the list of objects and fields available through a button on the map screen.

Coming soon...

As part of this release the following functionality will also be made available over the coming weeks:

Document upload – the ability to upload and transfer documents to your CRM.

In-line (same page) conditions – show or hide content on the same page as a determining question.

Advanced field validation – more tightly define what data input to accept.