Clicktools Release Notes

The December 2012 update to Clicktools follows a substantial beta period that commenced in July 2012. The new release builds on the existing Clicktools architecture, providing additional features, a more intuitive user interface, and an enhanced user experience.

The best version of our product to-date, the new Clicktools will make it faster and easier for you to collect, centralize, and act on customer interactions, leveraging the power of CRM.

Key Benefits to You:

- **Brand New Look:** With an eye for improving overall user experience, we recruited top-notch application designers to make the Clicktools interface as smooth and intuitive as possible.

- **Smoother User Experience:** Aiming for increased efficiency, we tailored the navigation and feature sets to support how you work and save you significant time.

- **Easier to Use:** Even first-time users will find the new Clicktools simple to use. The updated homepage serves as the launch pad, while improved features make creating and deploying surveys easier.

New & Enhanced Features

When you log into the new Clicktools, you will find all of your content available, as you had previously generated. No need for any complex set up either; the configuration of your organization remains in place.

In the new Clicktools, you will find the following new and enhanced features.

Homepage
The new homepage presents a summary view of your account, including signposts directing you to the features and functionality most important to you, such as your most recent content, CRM synchronization results, and survey responses. *(See Figure 1)*
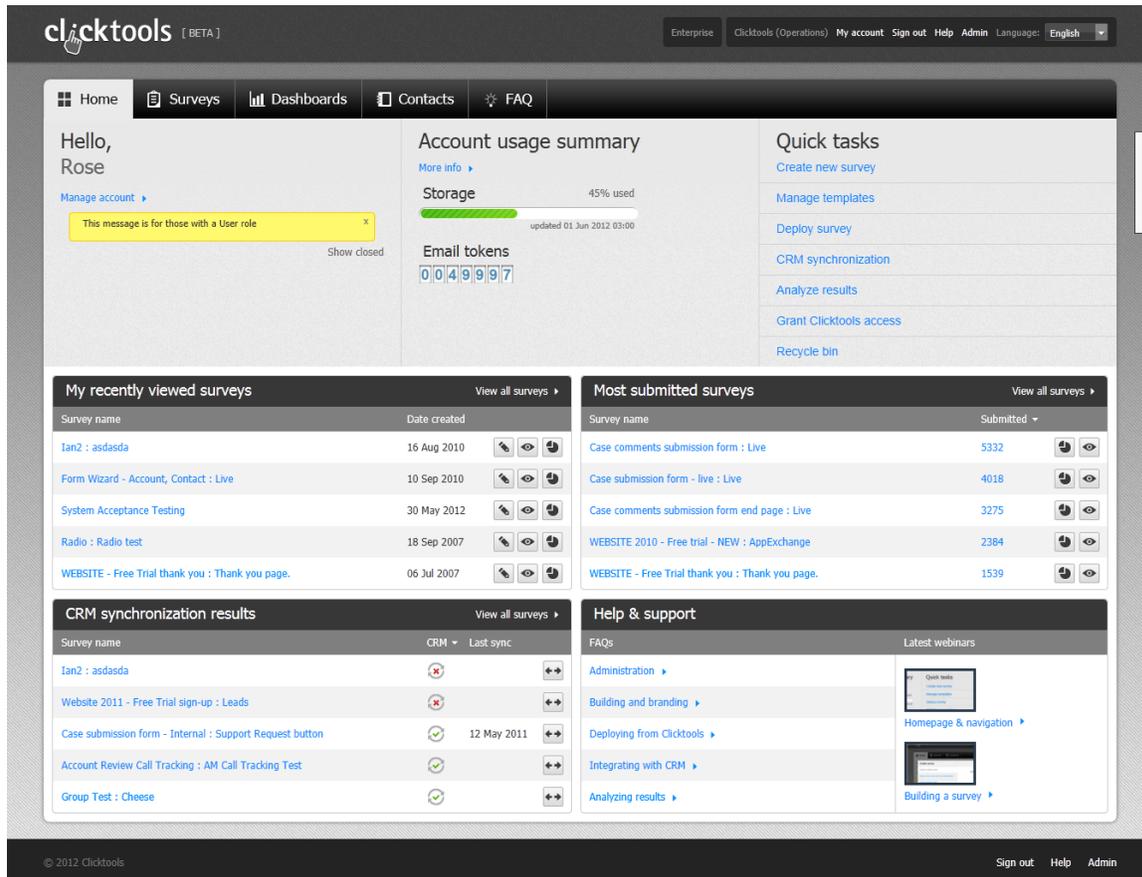
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Figure 1

Other Homepage Highlights *(See Figure 1)***:**

- **Account Usage Summary:** You can now monitor email token usage from the Clicktools application homepage via a graphical Storage gauge. Know for certain that you have enough to reach all your contacts!
- **Quick Tasks:** The new Quick Tasks area provides direct links to key functionality tailored by user role. This will save you time accessing most-used functionality.
- **My Recently Viewed Surveys:** Access your five most recent surveys directly from the homepage for quick access to what you're working on now, including links to preview, edit and analyze the results of your surveys. Click "View all surveys" to see the entire list.
- **CRM Synchronization Results:** See a quick view of synchronization results for CRM-integrated surveys right from the homepage. If any problems have occurred, indicators display the errors, so that mappings can be verified and if necessary, resynchronized.
- **Notifications:** Notification messages regarding product and company announcements are now available on the homepage.

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Tabbed User Interface

The new Clicktools features a simpler design, which will guide you through process flows from left to right through a series of tabs. *(See Figure 2)*
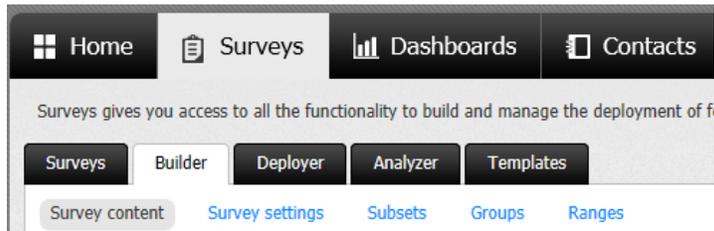

Figure 2

Change Selector

The change selector enables you to quickly switch between surveys without needing to leave the page. Just click Change and a tray drops down, giving you immediate access to your last five surveys or the option to look in another folder to make your selection. *(See Figure 3)*
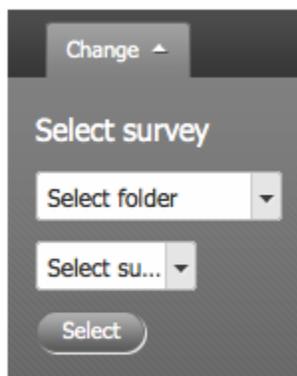

Figure 3

If there are multiple instances of the survey you are working on, then you will see the Instances Indicator within the central panel. In this circumstance, you can also

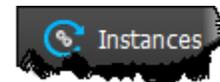switch to a different instance of the same survey. *(See Figure 4)*

Figure 4

Survey Search

Take advantage of the ability to search for a survey by typing all or part of the survey name in a search field that appears on the right of the central bar.

Example Library

Go way beyond surveys with ideas from the newly expanded Example Library. Simply copy an example to make it your own and automatically copy any built-in mapping, as well. For custom objects, you will need to amend your survey mapping to properly synchronize with your CRM system. *(See Figure 5)*
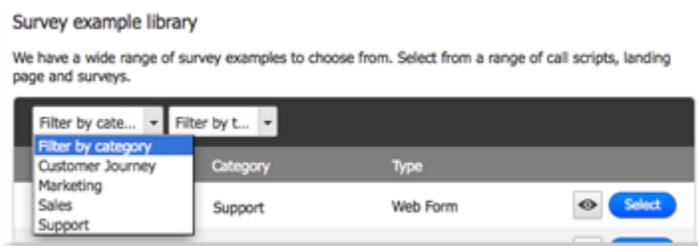
Figure 5

Deployer

Launch your survey more quickly than ever using the URL provided as soon as you have built your survey. To distribute and collect responses, go to the Survey Deployer page and see your options on the left-hand side of the page. *(See Figure 6)*
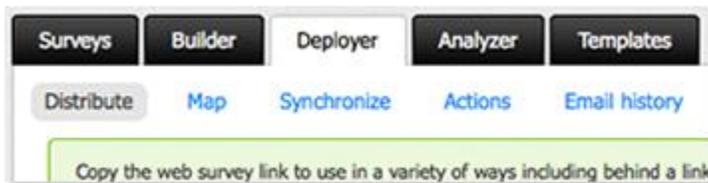

Figure 6

You no longer need to create an Instance of your survey; we have done this for you, as well as defaulting to show the survey URL, which enables you to publish the survey much more quickly. *(See Figure 7)*
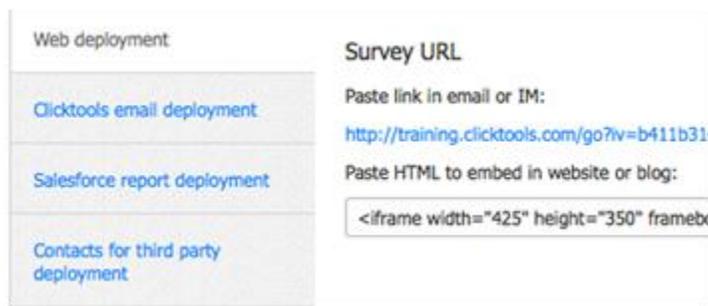

Figure 7

If you wish to analyze results across multiple surveys using Dashboards, you will need to produce multiple Instances of the survey. This functionality remains available using the Create New button and opting to create an Instance from an existing survey.

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Auto-copy Mappings

Just what you've always wanted – now when you copy an existing survey, the CRM mappings will automatically copy to your new survey. When you look at the mapping page in a survey, you can apply mappings an object at a time. Apply your CRM mapping rules to each question in turn. This reduces the need for lots and lots of scrolling.

Send Feedback Button

A Send Feedback link is now globally available allowing you to raise a support case, identify a bug, and add an idea from any page in the application.

Preview Button

You can now preview templates using the Preview button. The preview facility allows the same template (i.e. look and feel) to be applied to different surveys.

Analyzer (formerly Results) Function

View the questions and responses from your respondents using the Analyzer. This name change (from Results to Analyzer) better represents what you really do here. Remember that you can schedule an email with your results as an Adobe PDF attachment to your manager or any other interested personnel for their review.

Dashboards (formerly Analytics)

Build dashboards that show combined results and reports in easy-to-read charts. If you wish to analyze results across multiple surveys and present the results using Dashboards, you will need to produce multiple instances of the survey. Dashboards are available in the Clicktools Enterprise edition only.

Additional Support
- Access free training.
- Send feedback on the new Clicktools.
- See more information online.
- Contact account management at Acctmgt@clicktools.com

About Clicktools

Clicktools provides SaaS solutions that leverage CRM to collect, centralize, and act on customer interactions. Since 2001, Clicktools has helped organizations of all sizes and across industries improve customer experience. Thousands of marketing, sales, and support professionals worldwide use Clicktools to collect information through surveys, scripts, and forms; centralize the data in CRM; and act on insights to deepen customer relationships. Notably, Clicktools was the first survey provider to integrate with Salesforce.com and was an original member of the AppExchange. The company is privately held with headquarters on the South Coast of England and a US-based office in Phoenix, Arizona.