

Overview

This April 2014 release of the Clicktools solution provides improved folder management. This gives you greater control, organization, and security over your templates and emails. You can now manage user access to look and feel templates, email templates, and organizational emails by folders.

In an ongoing effort to make it faster and easier for you to collect, centralize, and act on customer interactions, leveraging the power of CRM, we offer you this latest version of Clicktools.

New & Enhanced Features

When you next log into Clicktools, you will find the following new and enhanced capabilities for folder management:

- **Greater control over content:** Set access policies by folder for tighter security. For example, you may give each department access to particular folders.
- **Decreased time, effort, and risk:** Group similar items together to quicken searching, decrease clutter, and restrict access to survey results.
- **Better organization company-wide:** Add structure to how you create and use Clicktools content across the entire company. For example, you may separate content by department, by subject matter, or even by status such as assigning items to a Draft folder versus a Live folder.
- **Exact knowledge of survey usage:** Know exactly how many surveys (and which ones) use your branded template with the “where used” functionality. Users can identify if a template is used by a survey, prior to editing it, greatly reducing the risk of breaking a live survey. Also, those not used can be removed. Remember, they can be retrieved from the recycle bin for up to 7 days.

It's easy to get started. Principal Users can create folders within the Admin area and assign user access – just like you can already do for surveys. Folders may reflect key processes or departments; your organization has the flexibility to decide how you want to work.

When creating a new look and feel template or email template, assign it to a folder to which you have access and from then on, only those users with privileges to that folder may see/edit the template.

Principal Users can also restrict access to users using organizational email – by assigning these to folders, too. This is most useful if you have different organizational emails for different departments or processes.

Learn more about these features in [the Help center](#). Request assistance or more info at support@clicktools.com.