Overview

This February 2014 release of the Clicktools solution focuses on the value of connection. We concentrated our development time and effort on improving integration with CRM and streamlining the management of connectivity within Clicktools.

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 features:

- **Credentials Manager**
  You will be able to maintain your CRM credentials in one convenient location.

- **Salesforce Connected App**
  Clicktools is now an official Salesforce "Connected App" so that you know we are following Salesforce security policies.

- **New CRM Integration tab**
  We've moved all of your CRM features, such as mapping and synchronization, under one tab for your convenience.

- **Configurable End Point**
  Clicktools staff will be able to manage your third-party data encryption services quickly and easily.

You will find more information below and full details in the Clicktools Help.

- **Credentials Manager**

  For our CRM users, we have made the process of maintaining your CRM credentials easier. By using the new Credentials Manager feature you will be able to manage your CRM credentials in one central place, rather than having to reset your password against every survey you have integrated with a CRM system, saving you time and effort. Get started with Credentials Manager here.

  When the Credentials Manager functionality is released, the existing CRM user and password will be migrated to Credentials Manager to ensure the existing surveys and synchronizations continue to run.

  The migration process will create Personal credentials, accessible from My Account or Public credentials, accessible from the Admin area, depending on whether the existing CRM credentials belong to specific Clicktools users or not, respectively. Principal users should look in Admin to see if any credentials need to be Authenticated. See this Help article for what to do now.

  For our Salesforce users, using Credentials Manager you can authenticate your Salesforce credentials. This means Clicktools will no longer be using your Salesforce password and will instead be using a Salesforce token.

- **Salesforce Connected App**

  We improved and simplified the way you connect with your CRM. For our Salesforce customers, Clicktools becomes a Salesforce "Connected App" giving you enhanced security and credentials controls between Clicktools and Salesforce. This means that Clicktools will no longer store your Salesforce passwords and will never have to update your password in Clicktools again. This allows for greater control over your Salesforce administration. Now that Clicktools is a Connected App, you can take full advantage of the additional levels of control that come with that.

  You will not be immediately affected by this change, unless you edit or create a new mapping, or modify your CRM integration credentials. However, we do recommend that you authenticate your credentials as soon as possible to update how Clicktools integrates with CRM. See instructions and learn more here >

- **New CRM Integration tab:** We made the software more user-friendly by moving the items needed to create, maintain, and monitor your CRM Integration into one easy to use tab. Learn more >

  The CRM integration tab is where you set your survey up for integration to CRM. It allows you to set the synchronization type on the CRM settings screen, to map your survey responses to CRM fields on the Map screen, and to manage your synchronizations on the Synchronize screen.

- **Configurable End Point:** You asked to connect Clicktools to CRM via third parties so you could use encrypted CRM data. We now offer configurable end points to our Enterprise customers. Learn more >

Additional Support

- Send feedback on the Clicktools solution.
- Contact your Customer Success Manager at success@clicktools.com
- Give us a call at US: 1-800-774-4065 or UK: 0800 0432587