



Clicktools September 2015 Release Notes

CallidusCloud is pleased to announce the September 2015 release of Clicktools. This release is scheduled for **Sep 27th 2015**. The release provides the following new features to enhance the Clicktools solution.

New Features Included in this release

[General release of our new User Interface](#)

[New and improved charts](#)

[SMS/IVR updates](#)

[Mobile](#)

[SugarCRM API update](#)

General release of our new User Interface

Hopefully by now you have had the chance to log in and work with the new user interface. The new UI offers an improved user experience through better menu structures, natural navigation through the process and the introduction of wizards for complex tasks.

Going back to our roots, *SURVE by Clicktools from CallidusCloud* is changing to **Clicktools by CallidusCloud**.

We have updated the login screen to reflect the change.

CallidusCloud

Clicktools

Browsers supported: Firefox, Chrome, Safari, IE9, IE10, IE11

[Subscription Agreement & Cookies Policy](#)

©2015 Callidus Software Inc.
All Rights Reserved.

Username

Password

Login

[Create account](#) [Forgot password](#)

If you did not get a chance to work with the new interface prior to its general release, here are some of the features and functionalities that you have missed.

- **New and improved reports** offer real-time analysis of survey results, which allows you to act faster.
- **Offline deployment** enables you to collect feedback even when an internet connection is not available.
- **Report wizard** combines the export and publish functionality into one central location as well as simplifies the report creation process.
- **IVR deployment** allows customers to complete surveys over the phone.
- **SMS deployment** lets you send mobile survey links to smartphones.
- **SMS alerts** show Clicktools users important notifications on their smartphones.
- **Litmos deployment** sends follow-up surveys to people who have taken an online training course via the Litmos learning management solution from CallidusCloud.

[Click here](#) to take the Clicktools tour and see the sleek interface and useful new features.

New and Improved Charts

If you have been using the new interface, then you are familiar with the improved charting capabilities at the question level. The new charts allow you access to valuable pieces of information for analyzing how your survey question is performing.

With this release, we have taken that functionality a step further by including the improved charts in both the *Summary data to PowerPoint* and *Summary data to PDF* reports. We

have created consistent graphs to be used throughout Clicktools reporting, allowing our customers to easily share professional reports across their organization.

SMS/IVR updates

This summer we added survey deployment options to our multimode approach.

- IVR Deployment to allow respondents to complete surveys over the phone
- SMS deployment to send mobile survey links to smartphones

We have improved these two deployment methods in this release.

For **IVR** we have added the landline number field to the contact record allowing us to automatically tie the IVR responses to the contact record utilizing this number.

If the contact calls to take the survey using the phone number listed in their contact record, we will tie the responses to that contact. If they use a different number or if that field is not populated in the contact record, the responses will come in as anonymous.

Some mobile providers enforce a 160-character limit in **SMS** while others do not support concatenated messages, so we've added a URL shortener. The URL shortener works in conjunction with the pre-populated survey url allowing you to maximize your message content while still linking to an annotate URL.

You will also not have to worry about including a STOP message to adhere to the industry standards. We have provided an additional optional mobile opt out message that defaults to the typical message *Reply STOP to opt out of survey text messages. Msg & Data rates may apply.* You can alter this message as you see fit. Just remember to adhere to the 160-character limit.

Mobile

We are beyond excited to share this new functionality. Research shows that smartphones are slowly overtaking the desktop in email usage. As such, mobile surveys are becoming a standard deployment method.

But how do you know if your respondents are on mobile devices or not? You may want to tailor the survey, depending on how the recipient receives it. For example, statistically, if you ask more than five survey questions on a mobile device, the respondent will likely

drop out. So, you wouldn't want to decrease your response rates by asking too many questions for a handheld environment.

On the other hand, if a survey is launched via a desktop and the product or service is important to the viewer, they are often willing to take the time to answer additional questions and even share other insights about the relationship. This information could be critical to improving customer satisfaction.

To add to these complications, what if a customer launches the survey from their desktop and you have it designed for a mobile device? Are you providing a pleasant experience for that desktop user? Probably not.

Good news: We have solved these major problems!!!!

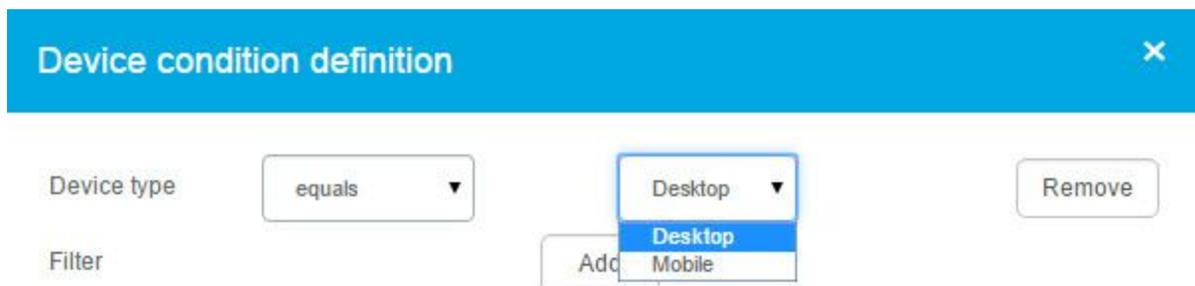
Device Conditions! We have shifted the argument from mobile first to device independence and revolutionized how you create surveys! You can now create one survey that will present and operate differently (appropriately) on different devices.

Device Conditions are easy to use, too. You create them just as you would Question conditions.

From within Design > Content just select the question that you wish to add a Device Condition to. Click the Add option.



On the Device Condition definition screen select the device. If you would like the question to only appear on the desktop version of the survey, select Desktop in the dropdown.



Focusing on device independence this time around, it made sense to improve other aspects of our mobile offering as well to support our award-winning desktop solution.

One of these improvements is the ability to add a mobile exit page. Say your survey respondent launches their survey via a mobile device you might want to send them to an exit page you've created especially for mobile devices. It is easy to set this up.

Design > Survey Setting > Mobile exit page

The screenshot shows the 'Design > Survey Settings' page. The 'Mobile exit page' field is highlighted in blue, and a red arrow points to the 'Test' button next to it. The 'Exit page' field is also visible, containing the URL 'http://www.clicktools.com/'.

The next new feature came highly recommended from our customer base. We have some of the best customers in the world and when they said that it would be great if we gave them a switch to change mobile surveys to display a single question per page we agreed that was a terrific idea. We now allow you to set your mobile template to display a single question per page on mobile surveys without changing the look of your desktop survey.

Lastly, within the mobile template design, you can now enable the use of mobile only image buttons instead of the mobile themed buttons, further enhancing your ability to customize your mobile look and feel.

SugarCRM API update

Updated to the SugarCRM API version 4.

As part of the upgrade, organisations will no longer have to provide a static schema of module relationships in the organisation settings page. Modules will be loaded from the API dynamically, so if new modules are created, they will automatically be available in the mappings page.

Browser Support

To stay current with industry trends, Clicktools will no longer support Internet Explorer 8 as of this release.

Contact Center Edition

In addition to these new features, Clicktools Contact Center Edition is now available on general release. This new edition provides multi-language call scripting and guided questioning to improve the quality and productivity of agents. Contact an Account Executive (sales@clicktools.com) or your Customer Success Manager for further information.