The functionality will be included in relevant Clicktools licenses from Sunday 3rd April. The application will be unavailable for a maximum of 15 minutes at 7am GMT to allow the upgrade to take place.

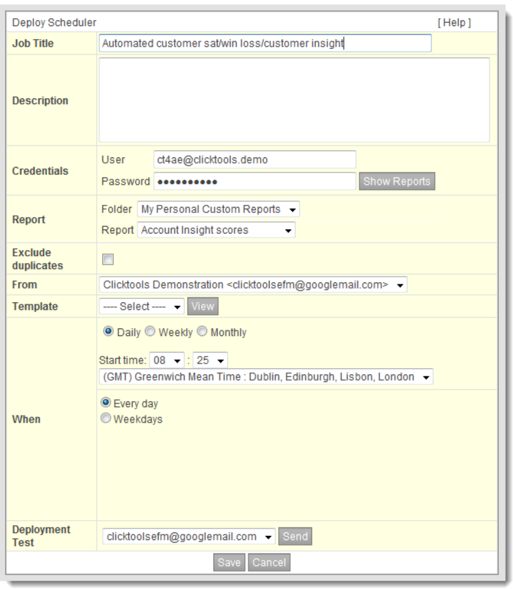
Introduction

This release sees the addition of some exceptionally powerful functionality in Clicktools. This document outlines the new functionality that will be released in to **relevant accounts w/b 3rd April 2011**. The highlights are (including in all editions unless stated):

- *Schedule deployment of emails and surveys using Salesforce reports (all editions, Salesforce connectors only, email tokens required).*
- *Complex actions and alerts (Pro edition and above).*
- *Filter on submitted or synchronized responses.*
- *Append information when synching to CRM.*

Schedule deployment of emails and surveys

Clicktools for Salesforce users will note that when the click the 'Deploy' option they are given the choice of either a 'New Schedule' or a 'One Time Deployment'. One Time Deployment is the same functionality that already exists. 'New Schedule' provides access to the new capability.



When selected, users will be able to select:

• A custom report that will provide a list of people who will receive the email.

• Email template for content.

• Include or exclude duplicates to send the individual several or one survey.

• One of their organization email addresses to be used as the 'sender'

• When the report is to be run. This could be daily, weekly or monthly with the flexibility to pick certain days, weeks, months etc.

When saved, at the appropriate time each month Clicktools will run the report again and send the chosen email to the email addresses found in the report. This could be a Leads, Contacts or Contact Roles or any email addresses in any other standard or custom object.

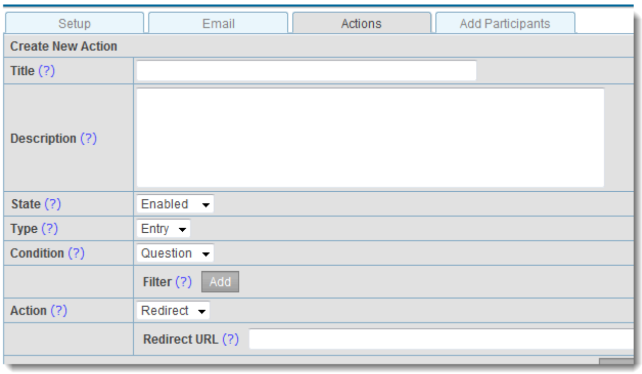
This new functionality provides powerful benefits:

• Quick and easy automation of 'relationship' surveys such as quarterly customer satisfaction or advocacy to all new customers.
• Reduce dependency on SFDC Admin to build complex triggers and workflow rules.
• Reduce the amount of development work required to build complex triggers.

Complex actions and alerts (available in Pro edition and above)

Until now, users of Clicktools Pro and above had access to a simple alert capability set at the Administration level. These users now have access to an 'Action' tab from the Deployment menu. This simple tab gives access to an incredibly powerful capability. A user may create multiple actions against an instance. For each Action, the user can define:

Type: Will the Action take place on Entry (as soon as the page is displayed) or on Exit (when the Submit button is pressed)?



Condition: When will this Action happen? You may define a condition against both contact data stored in Clicktools and/or Question answers. Setting no filter means that the Action will happen every time.

Action: Will an email be sent or the individual re-directed to another URL? If an email is sent, a template is chosen and the email can be sent to users, other email addresses and email addresses captured in questions. If re-direct is chosen, information captured in the survey or information against the Contact can be passed in to the URL.

Potential applications include:

- Emailing a copy of survey results to an individual in a html email.
- Immediately alerting someone when someone starts to complete a survey or form.
- Forwarding on people who provide different answers to different exit pages.
- Forwarding on people who have already answered the survey to a "Thank you but you have already answered this survey" page

These examples are just some of the ways that Actions can be used. Please follow Clicktools blog, Facebook pages or Twitter to keep up to date with more applications.

Filter on submitted/synchronized responses

Within a question filter it is now possible to filter on the status of a response, namely whether a response has been:

- Submitted
- Not Submitted
- Synchronized with CRM
- Not Synchronized with CRM

This filter may be combined with other question filters. Amongst other things, these filters make it easier for users to highlight respondents who should be sent reminders to complete and easily compare results in Clicktools to results in Salesforce.

Append information when synching to CRM

Finally, when synching to string, textarea or multi-picklist users can choose to 'Append' information to existing information. This is useful, for example, when adding information to Description fields or recording answers to multiple questions in one large essay field.

