

Web Forms for Marketers 2.2 for Sitecore CMS 6.4 User Guide

A practical guide to creating and managing web forms



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Chapter 1

Introduction

This document is designed for end users, and provides detailed information on creating and editing web forms as well as viewing and analyzing form reports. For more detailed technical information on the module, read the Web Forms Reference manual.

The Web Forms for Marketers module is designed to let you create simple forms, and localize them in different languages in the blink of an eye and in a user-friendly manner. The Web Forms for Marketers module records and reports the information provided by visitors in forms. The module records this information regardless of whether or not the visitor fills in the form successfully or not. The module also provides users with Web analytics and reporting capabilities and is fully integrated with the Online Marketing Suite for Sitecore CMS 6.

The module can be configured so that forms have only a few adjustable parameters thus making the user interface as simple as possible. For instance, the basic options cover the most frequent needs of a Web site editor, such as, creating basic input fields (text boxes, check boxes), basic actions (save to a database, send an e-mail), and basic validators (Required Field validator, Email address validator, and so on).

As most forms on a Web site are simple and straightforward, creating and managing them should also be simple and straightforward.



Here is an example of how a form created using this module could look on a site:

lome	Our Process	Our Services	Our Clients	Our Partners	Design Inspiration	News and Events	s About Us	Contact Us
Contact		let people ki Contact Name E-mail Your messay Contact u	n have worldwide how how they can t US	operations or a sin get in touch with ;	ngle office, create a Conta you.	ct section to	Nam liber tempo lusto odio diginisi present lugati duis dolore re feug Nant more infor tave a look at our bio tave at our bio tave at our bio	m qui blandit zril delenit augue giat nulla facilisi. mation?
		ecore <u>Terms of U</u> Ir Services Our		rtners Design Iı	nspiration News and E	vents About Us C	Contact Us Con	tact Us O Powered by Silecor



Chapter 2

Getting Started

This chapter describes everything you need to create Web forms as well as the functionality of the module and user interface.

This chapter contains the following sections:

- Form Structure
- Creating a Form from Scratch
- Creating a New Form
- Updating an Existing Form
- Form Designer



2.1 Form Structure

Forms generated by the Web Forms for Marketers module have a standard set of elements which include:

- The form title the name of the form. Displayed at the top of the form.
- Introduction text displayed after the form title. This may include any useful information that visitors should know before they fill your form.
- Sections and Fields the main content of the form.
- Footer the piece of text displayed below all the sections and fields.
- Submit Button the button which triggers the actions associated with this form.
- Success the message or page displayed after the form has been submitted successfully.

Take a look at the sample form:

Required i	nformation for your account
E-mail	
	Must be a valid e-mail.
Password	
	Must be at least 6 symbols
Re-enter password	
- Additional	information
First Name	
Last Name	
Last Name Country	
	Select country where you are living



2.2 Creating a Form from Scratch

In our example, we create the "Tell a Friend" form that should allow a site visitor to automatically email their friends about the Web page. To create a form:

1. Navigate to the page where you want to locate a form. Insert a new form. For more information about creating a new form, see the *Creating a New Form* section

When you create a new form, it is opened in the **Form Designer**. The **Form Designer** contains the following elements:

📓 Tell a friend - Fo	orm Designer			
	Title Intro Footer Language		First Froperties Properties Profiles Close Close Close	
Appearance		1		
Default Value:				
Rows:	4		Tell a friend	— Form Name
Help:	×		Trie Your Name	Type Single-Line Text ▼
Css Class:	scfMultipleLineTextBorder		Title Your e-mail	E-mail
Validation		1	Title	Type Required
Validation:	No Validation		Friend's e-mail	E-mail 🔽 🔽
Regular Expression:			Title Message	Type Required Multiple-Line Text V
Minimum Length:	0			- Add a new field
Maximum Length:	512		Add Field	
Analytics			Add Section	Add a new section
Tag:			Yes, Share With My Friend	Submit button
	Select this checkbox to add the value of the selected field to the 'Tag' information in the OMS session report.			Submit Button

To configure a form:

- 1. Edit form name and form introduction if it is needed. Use the **Intro** button on the ribbon to display the introduction text on the form.
- 2. Add/edit sections (groups of fields) and fields. You are also able to create a form with no fields, and only a **Submit** button. For more information about sections and fields, see the *Field Sections* and *Form Fields* sections.
- 3. In the left-hand pane of the **Form Designer** window, specify the properties for each field and section. This can include default values, help text for the Web site visitor and specific validations for specific fields. For more information about field types and validations, see the *Fields and Validations* chapter.
- 4. Click the Submit button section and in the left-hand pane, set up the submit actions that will be performed when visitors click the Submit button on the Web site form. For more information about submit actions, see the Submit Actions section.
- 5. Save and close the form.

Now your form is ready to be used by Web site visitors.

Later you can view various reports to analyze how the form has been used by visitors. For more information about the forms reports, see the *Understanding Reports* section.

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2.3 Creating a New Form

You can create forms in the Page Editor.

There are two ways to create a form. You can:

- Copy an existing form.
- Create a new form.

There are 6 Web forms in the module by default:

- Create an Account
- Pay with Credit Card
- Tell a Friend
- Demo Form
- Leave a Message
- Get Our Newsletter

If the form that you are going to create is similar to one of those forms, *copy an existing form* and edit it. Otherwise *create a blank new form*.

Note:

If you are inserting forms from the Content Editor, you must create a form before you can add it to a layout.

2.3.1 Copying an Existing Form in the Page Editor

The Web Forms for Marketers module contains default forms that you can use when creating your forms. Copy an existing form and edit it. The Web Forms for Marketers module contains a *Create a New Form* wizard which will guide you through the form creation process.

To copy a form:

- 1. Open the Page Editor.
- 2. Open the page that you want to place a form on.
- 3. On the Home tab, in the New group, click Component:





4. The Add to here buttons appear on the web page:

dit Previe Mode			My Items k Yorkbox Edit	Publish A	Close Log Off Close				
Dffic Interior desig	ce Cor ign for business sp	'e aces				0		Search this Site 🍑 Pi	site 🔍 🔍
Home	Our Process	Our Services	Our Clients	Our Partners	Design Inspiration	News and Ev	vents Al	bout Us	Contact Us
							[No te:	xt in fiel	d]
	ir Services								
dd to here Our Serv	vices ting services	clients. Then	rselves on our ab efore, our service		ervices to the specific ne design consultation to fi d furnishing.		Lorem ij consecte diam no	n modo typ psum dolor etuer adipis onummy ni	
dd to here Our Serv 🕀 Consult 🕀 Design	vices ting services	+ Add to here We pride our clients. Ther	rselves on our ab efore, our service 'uding local proje	es range from basic	: design consultation to fi d furnishing.		Eudem Lorem ij consecte diam no tincidum aliquam ad minii exerci ta lobortis	psum dolor etuer adipis onummy ni it ut laoreet n erat vlutp m veniam,	r sit amet, sciing, elit, ded bh euismod t dolore magna at. Ut wisi enim quis nostrud icorper suscipit uip ex ea
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Alternatively, on the web page, click a placeholder to display the **Add to here** buttons for this placeholder.

- 5. Click **Add to here** where you want to place a form. If your Sitecore administrator has restricted placing web forms on the current placeholder you will not be able to insert a form there.
- 6. In the Select a Rendering dialog box, select the Form rendering and click Select.

Select the rendering that	you want to use. Click Select to	continue.	
Page Title and Text	Content Details	Subitem Overview	Repair likeling Name in the state of
Open the Properties dialog	box immediately.		Select Cancel



7. In the appeared **Create a New Form** window, in the **Form Name** field, enter a unique name of the new form.

eate a New Form			
Create a blank form or copy an	d existing one.		
Form Name: Tell a friend			
C Create a blank form			
Select a form to copy			
	< Back	Next >	Cancel

- 8. You must enter a unique name of the form that is different from the names of the existing forms on the website.
- 9. Click Select a form to copy and click Next.
- 10. In the Select a Form window, select the form that you want to copy and click Next.

Copy an existing form.	 	
Global Forms		
🖃 问 Sample forms		
📰 Create an Account		
📰 Get Our Newsletter		
🔄 Pay with Credit Card		
🗾 Tell a Friend		
🗾 Demo form		
🗾 Leave a message		
Website Forms		
🖃 问 Website		
🔄 Contact Us		

11. In the **Analytics** window, you can enable or disable the analytics functionality that is used to record and report user information.

	Choose which Analytics options you want to use with this form.
~	Enable Marketing Analytics
	Select this checkbox to associate a goal with this form. Other analytics functionality is also enabled.
-0	Soal
	Create a new goal
	Tell a friend Form Completed
	C Select an existing goal
	Select existing goal
	Select a new or existing goal that is achieved when the form is successfully submitted.
-0	Dropout Tracking
	Enable Form Dropout Tracking
	Select this checkbox to track all the information entered in this form. You will receive reports containing details about potential leads and usability problems. If this is enabled any data entered by viators is saved in the analytics database, whether the visitor completes the form or not.
	< Back Next > Cancel

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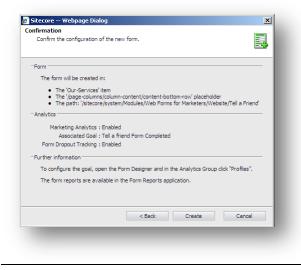


Enabling analytics also allows you to associate an existing goal with the form or create a new goal.

12. Select the **Enable Form Dropout Tracking** to track all the information entered in this form. When this is enabled all the data entered in this form is saved in the analytics database, whether the visitor completes the form or not.

For more information about analytics, see the Forms and Analytics section.

13. Click **Next** and the **Confirmation** window appears.



The **Confirmation** window displays the summary of the choices you made.

14. Verify your choices and then click **Create** to create the new form. The new form is opened in the **Form Designer**.

Image: Save Save/Close Image: Save Save Save Save Save Save Save Save	wn 😻 Last Properties Profiles Close
Appearance Default Value: Rovs: 4 Help: ************************************	Tell a friend Year Year Your Name Single-Line Text Your e-mail E-mail Year Recent Friend's e-mail Year Message Multiple-Line Text Message Multiple-Line Text Add Field Yes, Share With My Friend

- 15. In the **Form Designer**, you can edit the form and click **Save** or **Save/Close** to save the changes. Alternatively, click **Close** to close the **Form Designer**.
- 16. In the **Page Editor** ribbon, click **Save** in to save the form.

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2.3.2 Creating a Completely New Form

Create a completely new form if your form is totally different from the default ones. Otherwise, you can copy an existing form to create your form. For more information about copying an existing form see the *Copying an Existing Form in the Page Editor* section.

The Web Forms for Marketers module contains a *Create a New Form* wizard which will guide you through the form creation process.

To create a new blank form:

- 1. Open the Page Editor.
- 2. Open the page that you want to place a form on.
- 3. On the Home tab, in the New group, click Component:

Edit Preview -	Component	Insert Lock Vorkbox	Publish	📕 Close 🎢 Log Off
Mode	New	Edit	Publish	Close

The Add to here buttons appear on the web page:

_	Experience View						
it Preview → Compo				Close Log Off			
Mode Nev	W	Edit	Publish	Close			
						Search this	site 🔍
Office Col							
chor design for business s	poces				0	Edit this Site 🍑 Pr	rint 🧯 Sitemap
lome Our Process	Our Services	Our Clients	Our Partners	Design Inspiration	News and Ev	ents About Us	Contact Us
	-		1			[No text in field	
					<u> </u>		
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d to here JUIT SERVICES Consulting services Design	+ Add to here We pride ou clients, Ther	rselves on our ab	es range from basi	ervices to the specific nee s design consultation to fu d furnishing.	ds of our	Eudem modo typ Lorem ipsum dolor consectetuer adipis diam nonummy nit	sit amet, scilng, elit, ded oh euismod
d to here ir Services d to here JUT Services B Consulting services B Design B Build d to here	+ Add to here We pride ou clients, Ther	irselves on our ab refore, our service 'uding local proje		c design consultation to fu d furnishing.	ds of our	Lorem ipsum dolor consectetuer adipis	sit amet, icilng, elit, ded sh euismod dolore magna at. Ut wisi enim quis nostrud corper suscipit uip ex ea
d to here Dur Services Dosign Build	 Add to here We pride ou clients. Ther Add to here 	irselves on our ab refore, our service 'uding local proje	es range from basi act management an	c design consultation to fu d furnishing.	ds of our	Eudem modo typ Lorem ipsum dolor consectatuer adipis diam nonumny nit tinidium tut laoreet aliguam erat vlutpa ad minim veniam, exerci tation ullam lobortis nisi ut aligi commodo consequ Morum est notare: gothica, quam nun parum claram, ant litterarum formas h	sitamet, incling, elit, ded oh euismod dolore magna at. Ut wisi enim quis nostrud corper suscipit uip ex ea at. quam littera c putamus aposuerit numanitatis per
d to here Dur Services Dosign Build	+ Add to here We pride ou clients. Ther + Add to here + Add to here • Add to here Often, a bus interior desi existing grou	refore, our service 'uding local proje Ca ca ca ca ca ca ca ca ca ca c	es range from basi ct management an moulting servic ady has a good reli tances, Office Corn tize workflow, Tr in	c design consultation to fu d furnishing.	eds of our Il turnkey or to the	Eudem modo typ Lorem ipsum dolor consecteture adjois diam nonummy nil tindidunt ut laoreet aliquam erat vlutps ad minim veniam, exerci tation ullarm loboriti nilai ut aliqu commodo consequ Morum est notare i gothica, quam nun parum claram, ant	sitamet, incling, elit, ded oh euismod dolore magna at. Ut wisi enim quis nostrud corper suscipit uip ex ea at. quam littera c putamus aposuerit numanitatis per

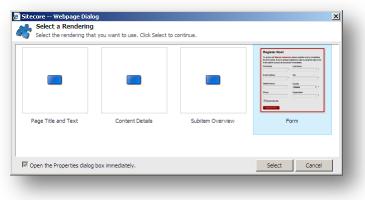
Alternatively, on the web page, click a placeholder to display the **Add to here** buttons for this placeholder.

4. Click **Add to here** where you want to place a form. If your Sitecore administrator has restricted placing web forms on the current placeholder you will not be able to insert a form there.

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5. In the Select a Rendering dialog box, select the Form rendering and click Select.



6. In the appeared **Create a New Form** window, in the **Form Name** field, enter a unique name for the new form.

reate a New Form				E	
Create a blank form or	copy an existi	ng one.			-
Form Name: Tell a fr	iend]
• Create a blank form					
C Select a form to copy	r				
		< Back	Next >	Cancel	

You must enter a unique name that is different from the names of the existing forms on the website.

- 7. Select Create a blank form and click Next.
- 8. In the **Analytics** window, you can enable or disable the analytics functionality that is used to record and report user information.

Choose which Analy	tics options you wa	ant to use with	this form.		2
Enable Marketing An	alytics				
Select this checkbox enabled.	to associate a goa	I with this form	. Other analytics	functionality is als	0
Goal					
Create a new	goal				
Tell a friend F	orm Completed				
C Select an exis	ting goal				
Select exis	ting goal			~]
Select a new or ex	isting goal that is a	chieved when	the form is succes	sfully submitted.	
Dropout Tracking					
Enable Form D	the second transfer of				
Select this checkb	ox to track all the in			ou will receive re	ports
If this is enabled a	about potential lea ny data entered by ses the form or not.	, y visitors is sav		database, whet	ner
		< Back	Next >	Cano	-1

Enabling analytics also allows you to associate an existing goal with the form or create a new goal.

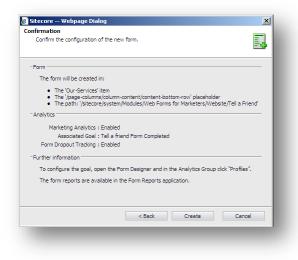
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9. Select the **Enable Form Dropout Tracking** to track all the information entered in this form. When this is enabled all the data entered in this form is saved in the analytics database, whether the visitor completes the form or not.

For more information about analytics, see the Forms and Analytics section.

10. Click **Next** and the **Confirmation** window appears.



The **Confirmation** window displays the summary of the choices you made.

11. Verify your choices and then click **Create** to create the new form. The new form is opened in the **Form Designer**.

	Up test First Down V Last Properties Profiles Analytics Close Close
1 This form does not contain any fields.	Tell a friend
	Add a field
	Submit

- 12. In the **Form Designer**, you can edit the form and click **Save** or **Save/Close** to save the changes. Alternatively, click **Close** to close the **Form Designer**.
- 13. In the Page Editor ribbon, click Save 🖬 to save the form.



2.4 Updating an Existing Form

In the Page Editor, you can edit, move or delete an existing form.

2.4.1 Editing a Form

To edit an existing form:

1. In the **Page Editor**, click the form on the web page:

Form	🔕 🕶 More 🕶		
Tell a Friend			
Your Name			
/our e-mail			*
riend's e-mail			*
4essage		A	*
		-	
Yes, Share With M	y Friend		

- 2. Click the Edit button So to open the Form Designer.
- 3. In the Form Designer, edit the form.
- 4. In the Form Designer, click Save or Save/Close to save the changes.

Note

To open the Form Designer in the Page Editor you can either click the Edit button or the Properties button.

2.4.2 Moving a Form

To move an existing form to another place:

1. In the Page Editor, click the form on the web page:

Tell a Friend			
Your Name			
Your e-mail			*
Friend's e-mail			
Message		A	*

2. Click the Change position button a.



The **Move to here** buttons appear in all the places where the web form can be placed:

3 🗟 🖌	My Items	S	Close		
dit Preview - Compon			.og Off		
Mode New	Edit	Publish C	lose		Search this site
erior design for business space				🔾 Edit	this Site 🎐 Print 🥞 Sitemap
ome Our Process	Our Services Our Clients	Our Partners	Design Inspiration	News and Events	About Us Contact Us
					io text in field]
ome » Our Services)ur Services	Tell a Friend				udem modo typi
0 Consulting services 10 Design 18 Build 19 Furnish	Versible and the services of t	bility to match our serv es range from basic de	sign consultation to fu	A condition of the second seco	prem ipsum dölor sit amet. Insecteuer adipisciling, elit, ded am nonummy nich auismod hidunt ut laoreet dolore magna iquam erat Yutpat. Ut wei anim derei tation ullamoorper suscipt borta insi ut aliquip ex ea immodo consequat. orum est notare quam littera thica, quam nuc putamus arum claram, anteposuerit terarum formas humanitatis per tacula quarta decimal et quinta acimal.
	>>> Move to here	onsulting services		н	Vant more information? ave a look at our brochures!

- 3. Click the Move to here button where you want to place the form.
- 4. In the **Page Editor** ribbon, click **Save l** to save the new position of the form.

2.4.3 Deleting a Form

To delete an existing form:

1. In the **Page Editor**, click the form on the web page:

Tell a Friend			
Your Name			
/our e-mail			*
Friend's e-mail			*
Message		A	*
		-	

- 2. Click the **Delete** button **X**.
- 3. In the **Page Editor** ribbon, click **Save** 🔚 to save the changes.



2.5 Form Designer

Use the Form Designer to design and edit forms.

efault Value:		Tell a friend
ows:	4	ren a menu
lelp:	<u>_</u>	
		Tide Invitation
	v	Title Type Required
ss Class:	scfMultipleLineTextBorder	Your Name Single-Line Text 🔽
Validation		Title Type Required
alidation:	No Validation	Your e-mail E-mail 💌 💌
egular Expression:		Tide Type Required
rror Message:	A	Friend's e-mail E-mail 🔽 🗹
		Title Type Required
	<u></u>	Message Multiple-Line Text 🔽 🕅 💥
linimum Length:	0	G Add Field
laximum Length:	512	🔀 Add Section
Analytics		
ag:		Yes, Share With My Friend
	Select this checkbox to add the value of the selected	
	field to the "Tag" information in the OMS session report.	

2.5.1 Using the Form Designer

To use the Form Designer workspace, in general, you can use the following method:

- 1. In the right part of the window, create the form sections and fields.
- 2. In the left part of the window configure the parameters for the sections, fields, and the **Submit** button.

To set up the actions performed when the visitor clicks the **Submit** button on a form, click the **Submit** button in the right part of the window and then configure the parameters.

2.5.2 The Form Designer Toolbar

You can perform the following actions in the Form Designer:

- Create a form title, introduction text that is displayed right under the title and form footer the text displayed under the Submit button on your form. To do that, click **Title**, **Intro** and **Footer** buttons.
- 2. To switch current language of the form, click the appropriate Language button.
- 3. To sort the field or section, select appropriate section or field and click one of the **Sorting** buttons.
- 4. To set up the analytics options click **Properties** and **Profiles**.

For more information, see the Forms and Analytics section.

- 5. To convert your form into a standard ASCX control, click **To ascx**.
- 6. To switch to the Form Reports application, click Form Reports.
- 7. When all changes are done, click **Save** to save changes or **Save/Close** to save changes and close the form. If you don't want to save your changes click **Close** button.



2.5.3 Form Fields

The set of fields defines the look and purpose of a form.

⊺ide Your name	Type Single-Line Text	~	Required	ж
_				

Each form field contains the following fields:

• Title

The name of the field on the front end. It is also a label generated for the field.

• Type

The type of the field.

• Required

This check box defines whether the *Required not empty value* validator is attached to this field. The check box is disabled if it doesn't make any sense for the current field.

Delete button

The button which deletes the selected field.

To add a new field, click Add Field.

2.5.4 Field Sections

Field sections are used to group fields.

Image: Save Save Close Image: Introduction Footer English ~ Image: Introduction Footer English ~ Image: Introduction Footer English ~ Image: Introduction Footer Image: Intro	wn 😻 Last Properties Profiles Form Reports Close
Layout Title Tell a friend	Tell a friend
	The text you enter here is displayed directly below the form name. This could be, for example, a description, some instructions, or any other information. Tale Invitation Tile Tile Required
	Your Name Single-Line Text Tale Type Your e-mail E-mail Trie Type Required Friend's e-mail E-mail
	Tide Type Required Message Multiple-Line Text Add Field Add Sector
	Tide Type Required Country Drop List
	🚱 Add Field 😪 Add Section 💌

Click **Add Section** to create a new section. You can then add fields to this section. A form can also consist only of fields that are not grouped into sections.

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2.5.5 Form Properties

When you select a field, you can see its properties on the left-hand pane of the Form Designer.

Default Value:	
Rows:	4
Help:	A
Css Class:	scfMultipleLineTextBorder
Validation	
Validation:	No Validation
Regular Expression:	
Error Message:	
Minimum Length:	0
Maximum Length:	512
Analytics	
Tag:	
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.

The list of properties depends on the type of the field selected.

Appearance

This section contains the parameters that affect how the field is displayed on the form: default value, help text and CSS class.

Validation

This section contains the parameters that define the range of acceptable values for the field: validation type, the appropriate expression, as well as the minimum and maximum number of symbols. For more information about validation, see the **Validations** section.

Analytics

This section only contains the *Tag* parameter. If you select the **Tag** check box for a field, the information in this field will be displayed in the Session Reports of OMS. For more information about OMS, see the *Online Marketing Suite Cookbook, Chapter 4 Analytics Reports*.

2.5.6 Configuring Submit Actions

When you select the **Submit** button section of the form, you can configure the actions that are performed when a visitor clicks the **Submit** button on the form. The left-hand pane displays the list of configured actions associated with the **Submit** button on the form.

Note

The Web Forms for Marketers module disables the **Submit** button once the visitor clicks it to avoid double clicking, and an undesired resubmission of the form.



Button Name			
Yes, Share With My Friend		T all a faile and	
res, share with wy Fliend		Tell a friend	
🎸 Form Verification	Edit		
Use these actions to verify the data submitted comparing the values with other data sources. visitor is returned to the form, and an error me	If a Form Verification fails, the		d directly below the form name. This could e instructions, or any other information.
[No actions specified]			
🖗 Save Actions	Edit	Title Invitation	
Use these to perform specific actions when a for a Save Action fails, the form is processed but the message.		Title Your Name	Type Required
A Save to Database		Title	Type Required
Tell a Friend		Your e-mail	E-mail
P Register a Goal		Title	Type Required
Success	Edit	Friend's e-mail	E-mail 💌 🔽
When a form is successfully submitted, you can success message.	display a specific page or a	Title Message	Type Multiple-Line Text
Success Page: [none]			
Success Message: Thanks for telling a frien our 'Tell a Friend' form.	d! We appreciate you using	Add Field	
		Add Section	
		Yes, Share With My Friend	
			J

Button Name

The text that will be displayed on the form, when it is shown on the site.

• Form Verification

The verifications listed will be performed when a visitor clicks the submit button on the form. Should any form verification fail, the Web site visitor will be returned to the form. For more information about form verifications, see the *Form Verification* section.

Save Actions

The save actions listed will be performed when all form verification actions have been completed successfully. For more information about save actions, see the *Save Actions* section.

Success

The Success message or the page that is shown after all the form verifications and save actions have been completed. For more information about the success submit action, see the *Success* section.



Chapter 3

Fields and Validations

This chapter describes the field types and validations that are used in the module.

This chapter contains the following sections:

- Field Types
- List Field Types
- Captcha Field
- Validations



3.1 Field Types

The Web Forms for Marketers module lets you create Web forms that contain different field types: text, date, list, and so on. The field type determines the type of information that the field can contain. Some of the field types, such as the e-mail field, use default validation methods. You can create custom validation methods for other field types. For more information about validation, see section *3.3, Captcha Field*.

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3.2 List Field Types

List fields let you select one or more options from a predefined group of values. To specify the items that should be displayed in a list field, you can:

- Manually enter the list items.
- Select a list of Sitecore items.
- Use an XPath query.
- Use a Sitecore query.
- Use a Fast query.

The last three methods are technically more complex and are generally only used by developers. For more information about the last three methods, see the *Web Forms for Marketers Reference*.

List fields can have both a value and a text. The value is stored in the database and used for statistics. It can also be what the visitor sees on the form. Text fields are used if you wish to display a text on the form which is different to the value. When adding list items, in the **List Items** dialog box, click **Display a different text on the form** to display the **Text** field.

et items by	Manually enter	ing names		•
		Disp	olay values as text on t	the form
🕑 Value		Text	English	
Pricing		Pricing information	4	3 🕄
Brochure			Contraction (1998)	3 🕄
Sales		Sales events	¢	
		,		

Important

You must enter something in the **Value** field. If you do not enter a value in the **Text** field or if you click "Display values as text on the form", the text entered in the **Value** field will be displayed on the form. If there are two or more identical values in the **Value** field, only the first value will be saved.

The **Value** and **Text** field values are also used when localizing forms in different languages. For more information about localizing forms, see the *Form Localization* section.

3.2.1 Selecting Sitecore Items

The Selecting Sitecore items option allows you to select a Sitecore item, whose sub-items are then displayed in the list field.

To select a Sitecore item:

You want to add a check box list of subscriptions to the form that allows the visitor to select what notifications they want to receive. On your site you have an item called *Customers information*. This item contains sub-items that correspond to the subscription types. These subscription types should be the field values.

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1. In the Form Designer, add a Checkbox List field:

⊺ide Name	Single-Line Text	•	Required	
Title E-mail	E-mail	•	Required	
Title Contact me about	Checkbox List	•	Required	*
Add Field				
Submit				

2. In the List section, in the Items field, click the button:

List Items: Selected Value: Appearance	0 items	Contact Us
Direction:	N S I	
Direction:	Vertical	Title
Columns:	1	E-mail
Help:		Contact me about
		Joontact me about
	•	🚱 Add Field
Css Class:	scfCheckBoxListBorder	Add Section
Analytics		A 1 1
Tag:		Submit
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.	

3. In the **List Items** dialog box, in the **Set items by** field, select the *Selecting Sitecore Items* option:

et items by	Selecting Sitecore item	S	_
elected Root Item /	sitecore		Browse
Value:	[Item Name] 💌	Text	[Item Name] 💌
content		content	
ayout		layout	
media library		media library	
system		system	
templates		templates	

4. In the Selected Root Item field, click Browse.



5. In the **Select a data source for the control** dialog box, navigate to the **Customers information** item, select it, and click **Select**.

tec	ore Webpage Dialog	
	Select a data source for the control	
	Please select the item you want to use as a source for the control. Then dick 'Select' to continue.	
-	💑 Content	
(= 🙆 Home	
	🗉 🧐 Standard-Items	
	@ Our-Process	
	🗉 🔱 Our-Services	
	Our-Clients	
	🗄 😏 Our-Partners	
	🗉 🤪 Design-Inspiration	
	News-and-Events	
	🗉 🎴 About-Us	
	Contact-Us	
	E Customers information	
	Brochure	
	Pricing information	
	Sales events	
	🗉 💋 Meta-Data	
	🗉 🧐 Settings	
	Layout	
	Media Library	
	System	
1	Templates	
	Select Cancel	

6. In the **List Items** dialog box, you can see that the sub-items are now listed.

Sitecore Wel	page Dialo	og		X
	-		ne list. You can m	anually enter these or use
Set items by	Selectin	g Sitecore iter	ns	•
Selected Root Item	/sitecore	/content/Home	e/Customers ir	nformation
Value	Field:	Item Name 💌	Text	Field:Item Name 💌
Brochure			Brochure	
Pricing information			Pricing informa	ation
Sales events			Sales events	
				OK Cancel

By default, Sitecore displays the **Item Name** field value of the item as a list value, but you can select any other item field to display. You can display a different text on the form. For example, if you have a user-friendly text in the **Display name** item field, and then you can select it as a **Text** value.



7. To select another item field, click the solution in the **Text** or **Value** column and select the field:

et items by	Selecting	Sitecore item	S			_
elected Root Item	/sitecore/c	content/Home/	Customer	s informati	on	Browse
/alue	Field:	Item Name 💌	Text	Fie	:ld:	Display name 💽
Brochure			Brochure a	nd monthly b	ooklet	
Pricing information			Prices and	advertising a	ctions	
Sales events			Sales even	ts		

- 8. Click OK
- 9. Click **Save** or **Save/Close** to save the form changes.

The values in the **Value** column are stored in the database while the values in the **Text** column are displayed in the form.

The list field is set. This is how it looks on the site:

lame		*
E-mail		*
Contact me about	Brochure and monthly booklet	
	Prices and advertising actions	
	Sales events	
Contact us		

3.2.2 Manually Entering Names

You can also manually enter the values that you want to display in a check box list.

For example, you can add a check box list of subscriptions to the form that allows the visitor to select what notifications they want to receive.

To manually enter the values displayed in a check box list:

1. In the Form Designer, add a Checkbox List field:

^{Title} Name	Type Single-Line Text	•	Required	
Title E-mail	E-mail	•	Required	
Title Contact me about	Type Checkbox List	¥	Required	2
Add Field Add Section				



2. In the **Items** field, click the **button**:

ems:	0 items	Contact Us
elected Value:		
Appearance		^{Title} Name
irection:	Vertical	Title
olumns:	1	E-mail
elp:	*	Contact me about
	•	🚱 Add Field
ss Class:	scfCheckBoxListBorder	Add Section
Analytics		Submit
ag:		Cubinit
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.	

3. In the List Items dialog box, in the Set items by field, select the *Manually Entering Names* option:

List It	Vebpage Dialog ems			×
	e values and text to display items or queries to use.	in the list. You c	an manually enter these	or use
Sitecore				
Set items by	Manually entering	names		
			Display a different t	ext on the form
Value				
Enter the val	ue of the list item			3
				Cancel

- 4. Click **Display a different text on the form** to display a text field where you can enter user friendly text.
- 5. In the **Value** field enter the value that will be stored in the database. In the **Text** field enter the text that you want to display on the form:

et items by	Manually enter	ing names			•
			Display values	as text on th	e form
3 Value		Text		English	
Pricing		Pricing inform	ation	G	
Brochure				C	
Sales		Sales events		•	

If you have already entered the Value field values, you must click the Value ³ Value</sup> link to be able to edit values.

- 6. Click 😳 to add a new line.
- 7. Click **OK** when you are finished.
- 8. Click **Save** or **Save/Close** to save the form changes.

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The form should look something like this:

Name		
E-mail		*
Contact me about	Brochure	
	Pricing information	
	Sales events	
Contact us		



3.3 Captcha Field

The Web Forms for Marketers module gives you the tools to protect your Web site from robot attacks. The Captcha field can help you to distinguish between real users and robots and, thus, protect your Web site and Web services from abuse by programs masquerading as real users. A Captcha field requires the user to enter some symbols displayed in a field.

Here is an example, how the Captcha field might look on the site:

- Required	information	
E-mail		*
Password		*
Confirmation		*
	X 6 6 V J	

You can either choose to display the Captcha field every time for every form, or you can display the field in the following cases:

- *The visitor is a robot.* The system identifies the current visitor as a robot using a special algorithm.
- A suspicious visitor is detected. A visitor submits the form several times in a short period of time.
- Suspicious form activity is detected. The form is submitted several times in a short period of time by one or more users.

If your Sitecore solution is running on several servers then the number of form submits per server is taking into account.

You can select the condition that must be fulfilled before the Captcha field is displayed on the form.

3.3.1 Always Show Captcha

You can configure the Captcha field so that it is always displayed on the form:

1. In the Form Designer, select the Captcha field.



2. In the Security section, select the Always Show Captcha option:

📓 Create Account	- Form Designer							
Save Save/Close	Title Introduction Footer ayout	English 🗸 Language	TO GOCK	♠ Up ❤ Down Sorting	🔶 First 😻 Last	Properties Analytics	Profiles	Fori Swi
Security				1				٦
Always show CAPT	гсна				Creat	te Aco	ount	t
Ithe visitor is a	a robot		Edit		If you a	already ha	ve an ac	coui
Appearance				-				- 1
Font Warping:	None		•		Title			
Background Noise:	None		•		Required	informatio	ı	_
Line Noise:	None		•		Tide E-n	nail		
Help:			A		Pas	ssword-Cor	firmation	_
Css Class:	scfCaptcha		▼		Title	er the sym	bols vou :	see
	1					Add Field	,	

3. Click Save or Save/Close to save the form changes.

3.3.2 Display Captcha under Specific Conditions

You can configure the Captcha field so that it is only displayed if a robot attacks you Web site.

A Suspicious Visitor is Detected

A suspicious visitor is a visitor who submits a form several times in a short period of time. Usually such behavior is peculiar to robots. To display the Captcha field if a suspicious visitor is detected:

- 1. In the Form Designer, select the Captcha field.
- 2. In the Security section, select the Show Captcha if option.

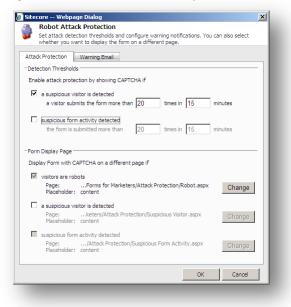
	- Form Designer	TO GOOK	Down 😻 Last Properties Profiles Fo
Security			
Attack Protection:			<u> </u>
Show CAPTCHA if		- 14	Create Account
		Edit	
쓋 the visitor is	a robot		If you already have an accou
Appearance			
Font Warping:	None	•	Title
Background Noise:	None	-	Required information
Line Noise:	None	•	Title E-mail
Help:			Title
			Password-Confirmation
			Title
Css Class:	scfCaptcha	_	Enter the symbols you see
			🚱 Add Field

3. In the Security section, click Edit.

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4. In the **Robot Attack Protection** dialog box, in the **Detection Thresholds** section, select a **suspicious visitor is detected** option.



- 5. Enter the limit of submits and the period of time.
- 6. Click **Ok** to close the **Robot Attack Protection** dialog box.
- 7. Click Save or Save/Close to save the form changes.

When you have configured the **a suspicious visitor is detected** option, an appropriate message is displayed in the **Security** section:

🕈 Create Account	- Form Designer		
Save Save/Close	Title Introduction Footer Laguet	TO USEX	Down 😻 Last Properties Profiles For
Security			
Attack Protection:			
C Always show CAF	тсна		Create Account
Show CAPTCHA i	f	Edit	
💓 the visitor is	a robot		
🧐 a visitor sub	mits the form more than 20 times in 15 n	nioutes	If you already have an accou
		Induc	
Appearance			Title Required information
Font Warping:	None	<u> </u>	Title
Background Noise:	None	•	E-mail
Line Noise:	None		,
Help:			Title Password-Confirmation
neip:		<u> </u>	
			Title
Css Class:	scfCaptcha		Enter the symbols you see

Note

When you enable the **A suspicious visitor is detected** condition, the **Visitor is a robot** condition is enabled automatically.

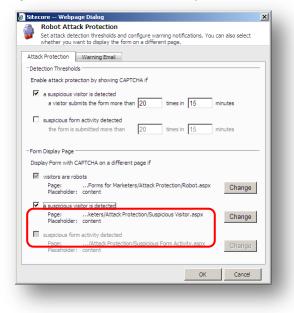
If a visitor submits the form more than the specified limit, the form with the Captcha field is displayed on the current page. You can display the form with the Captcha field on a separate page:

1. In the Security section, click Edit.

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2. In the **Robot Attack Protection** dialog box, in the **Form Display Page** section, select a **suspicious visitor is detected** option.



- 3. To display the form with the Captcha field on your custom page:
 - o Click Change.
 - o Browse to the page you want to display the form with the Captcha field on.
 - Select a placeholder where to put the form. Contact your Sitecore administrator to find out if this placeholder is enabled using the *Restricting Placeholders* wizard.
- 4. Click Ok to close the Robot Attack Protection dialog box.
- 5. Click **Save** or **Save/Close** to save the form changes.

Suspicious Form Activity Detected

Suspicious form activity means that the form is submitted several times by several users in a short period of time. Usually such behavior is peculiar to robot attacks. If your Sitecore solution is running on several servers then the number of form submits per server is taking into account. To display the Captcha field if suspicious form activity is detected:

1. In the Form Designer, select the Captcha field.



2. In the Security section, select the Show Captcha if option.

Create Account	Title Introduction Footer Languag		Down 😻 Last Properties Profiles Fo
Security Attack Protection: Alwaye chow CAP Show CAPTCHA in the visitor is		Edit	Create Account
Appearance Font Warping:	None	.	Title Required information
Background Noise: Line Noise:	None None	•	Title E-mail
Help:		*	Title Password-Confirmation
Css Class:	scfCaptcha		Enter the symbols you see

- 3. In the **Security** section, click **Edit**.
- 4. In the **Robot Attack Protection** dialog box, in the **Detection Thresholds** section, select the **suspicious form activity detected** option.

a -	Robot Attac	k Protection	
		ction thresholds and configure warning notifications. You can also so int to display the form on a different page.	elect
Attac	k Protection	Warning Email	
Dete	ction Thresholds		
Enal	ble attack protec	tion by showing CAPTCHA if	
	a suspicious vis		
	a visitor subn	nits the form more than 20 times in 15 minutes	
V	suspicious form	activity detected	
1.		ubmitted more than 20 times in 15 minutes	
	and rothing se	diffes in 15 minutes	
Form	n Display Page —		
		APTCHA on a different page if	
Disp	lay Form with CA	APTCHA on a different page if	
Disp	lay Form with CA visitors are rob	ots	
Disp	lay Form with CA	ots Forms for Marketers/Attack Protection/Robot.aspx Cha	inge
Disp	lay Form with CA visitors are rob Page:	otsForms for Marketers/Attack Protection/Robot.aspx Charcontent Charcontent	inge
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis Page:	otsForms for Marketers/Attack Protection/Robot.aspx Cha content itor is detectedketers/Attack Protection/Suspicious Visitor.aspx np	
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis	otsForms for Marketers/Attack Protection/Robot.aspx Cha content itor is detectedketers/Attack Protection/Suspicious Visitor.aspx np	inge
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder:	otsForms for Marketers/Attack Protection/Robot.aspx Cha content itor is detectedketers/Attack Protection/Suspicious Visitor.aspx np	
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder:	otsForms for Marketers/Attack Protection/Robot.aspx Cha content itor is detectedketers/Attack Protection/Suspicious Visitor.aspx Cha activity detected	inge
Disp	lay Form with C/ visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder: suspicious form	otsForms for Marketers/Attack Protection/Robot.aspx Cha contentketers/Attack Protection/Suspicious Visitor.aspx Cha contentketers/Attack Protection/Suspicious Visitor.aspx Cha activity detected	
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder: suspicious form Page:	otsForms for Marketers/Attack Protection/Robot.aspx Cha contentketers/Attack Protection/Suspicious Visitor.aspx Cha contentketers/Attack Protection/Suspicious Visitor.aspx Cha activity detected	inge
Disp	lay Form with CA visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder: suspicious form Page:	otsForms for Marketers/Attack Protection/Robot.aspx Cha contentketers/Attack Protection/Suspicious Visitor.aspx Cha keters/Attack Protection/Suspicious Visitor.aspx Cha activity detected/Attack Protection/Suspicious Form Activity.aspx Cha content	inge

- 5. Enter the limit of submits and the period of time.
- 6. Click **Ok** to close the **Robot Attack Protection** dialog box.
- 7. Click **Save** or **Save/Close** to save the form changes.



When you configured the **suspicious form activity detected** option, an appropriate message is displayed in the **Security** section:

	- Form Designer	To ascx	Up Rinst Down Last Properties Profiles For Analytics Swi
Security Attack Protection: C Always show CAP Show CAPTCHA if I the visitor is . I the visitor is .		Edit	Create Account
Appearance Font Warping: Background Noise: Line Noise: Help:	None None None		Tele Required information Tele E-mail Tele Password-Confirmation
Css Class:	scfCaptcha	V	Tide Enter the symbols you see Add Field

Note

When you enable the **Suspicious form activity detected** condition, the **Visitor is a robot** condition is enabled automatically.

If the form is submitted more than the specified limit, the form with the Captcha field is displayed on the current page. To display the form with the Captcha field on a separate page:

- 1. In the **Security** section, click **Edit**.
- 2. In the **Robot Attack Protection** dialog box, in the **Form Display Page** section, select the **suspicious form activity detected** option.

v	t attack detection thresholds and configure warning notifications. You can also select tether you want to display the form on a different page.
ttack	rotection Warning Email
Detec	on Thresholds
Enabl	attack protection by showing CAPTCHA if
	suspicious visitor is detected
	a visitor submits the form more than 20 times in 15 minutes
	uspicious form activity detected
	the form is submitted more than 20 times in 15 minutes
Form	isplay Page
Displa	isplay Page Form with CAPTCHA on a different page if istors are robots
Displa	Form with CAPTCHA on a different page if
Displa	Form with CAPTCHA on a different page if sitors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Channe
Displa	Form with CAPTCHA on a different page if sitors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Change Receholder: content susplicious visitor is detected Page:keters/Attack Protection/Susplicious Visitor.aspx Change Change
Displa	Form with CAPTCHA on a different page if sitors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Placeholder: content Suspicious Visitor is detected Page:keters/Attack Protection/Suspicious Visitor.aspx Placeholder: content Change
Displa	Form with CAPTCHA on a different page if sistors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Placeholder: content Suspicious Visitor is detected Page:keters/Attack Protection/Suspicious Visitor.aspx Placeholder: content Change Suspicious form activity detected Suspicious form activity detected
Displa	Form with CAPTCHA on a different page if sitors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Placeholder: content Suspicious Visitor is detected Page:keters/Attack Protection/Suspicious Visitor.aspx Placeholder: content Change

- 3. To display the form with the Captcha field on your custom page:
 - o Click Change
 - o Browse to the page you want to display the form with the Captcha field on

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- Select a placeholder. Contact your Sitecore administrator to find out if this placeholder is enabled using the *Restricting Placeholders* wizard.
- 4. Click Ok to close the Robot Attack Protection dialog box.
- 5. Click **Save** or **Save/Close** to save the form changes.

3.3.3 Configure a Warning Email

If a robot submitted a form or any of the specified thresholds are exceeded, the Web Forms for Marketers module may send an e-mail with the predefined text to the specified recipients. To activate e-mail notifications about robot attacks:

- 1. In the **Form Designer**, select the **Captcha** field.
- 2. In the Security section, select the Show Captcha if option:

💈 Create Account	- Form Designer		
Save Save/Close	Title Introduction Footer Layout		 Troperdes Tronies [110]
Security			
Attack Protection:			
O Always show CAR	тсна		Create Account
Show CAPTCHA if	F	Edit	
💜 the visitor is	a robot		
•			If you already have an accou
Appearance			
Font Warping:	None	~	Title Described information
Background Noise:	None	_	Required information
Line Noise:	None	-	Title E-mail
Help:			
nep:			Title
			Password-Confirmation
			Title
Css Class:	scfCaptcha	_	Enter the symbols you see
			Add Field

- 3. In the Security section, click Edit.
- 4. In the Robot Attack Protection dialog box, on the Warning Email tab enter:
 - Recipients' emails to the **To** and **CC** fields.
 - Email subject to the **Subject** field.
 - Text of the email notification in the **Message Body** field.

Siteco	re Webpage Dialog	×
🖉 S	obot Attack Protection et attack detection thresholds and configure warning notifications. You can also select hether you want to display the form on a different page.	
Attack	Protection Warning Email	
If visit	ors are robots or any of the thresholds are exceeded send a warning email	
To:	admin@mysite.com	
CC:	webmaster@mysite.com	
Subjec	t: Robot Attack	
Messa	ge Body:	
	bot attack is detected.	
	OK Cancel	

- 5. Click **Ok** to close the **Robot Attack Protection** dialog box.
- 6. Click **Save** or **Save/Close** to save the form changes.



3.4 Validations

The Web Forms for Marketers module provides both predefined validations and custom validations.

The predefined validations are designed to make it easy to add the most frequently used types of validations to the fields in your form. The rules governing the validation are displayed in the **Regular Expression** field.

/alidation:	No Validation	
Regular Expression:	No Validation	
regular expression.	Numbers only	
Minimum Length:	Letters only	
	Special Character must be included	
Maximum Length:	Number and special character	
	Email address	
Analytics	Custom	

You can also create your own validations.

3.4.1 Creating a Custom Validation

To create a validation, in the validation list, select **Custom**. You can then enter the expression you want to use in the **Regular Expression** field. To get started, you can copy and paste a regular expression from another validation.

The module also provides some built-in validations, which are used for some of the form field types provided by default in the module. These are not configurable in the **Form Designer**.

For example, your form contains a phone number field and you want customers to enter their numbers with a "+" symbol followed by no more than ten digits:

- 1. Open the form.
- 2. In the Form Designer select the field you want to edit
- 3. In the left-hand panel, in the **Validation** section, click the **Validation** dropdown list and select *Numbers Only.*
- 4. In the Maximum Length field, enter 11.
- 5. Save the form.

Note:

If you apply any validation to the field, we recommend that you describe it in the **Help** field to let customers know what type of data they should enter in this field.

3.4.2 Configuring Field Error Messages

If a visitor enters information into a form field that does not conform to the validation rule, an error message is displayed. All the field types in the Web Forms for Marketers module have error messages defined by default. These default error messages are specific to the validation and can only be edited in the Content Editor. Most field types also allow you to add a validation in the Form Designer and you can also add error messages in the Form Designer.

You want to add a ZIP Code field to your *Contact Us* form. This field might be useful to the sales department if they want to contact a customer by post. This field must contain no more than five numbers. If the visitor enters any other symbols, an error message should tell them about this.

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To configure an error message for a field:

1. In the Form Designer, add a Single-Line Text field.

Contact Us				- 1
⊺ide Name	Type Single-Line Text	•	Required	- 1
_{Tide} Е-mail	Type E-mail	•	Required	
Title ZIP Code	Type Single-Line Text	•	Required	*
Title Contact me about	Type Checkbox List	•	Required	
🚱 Add Field				
Contraction				
Contact us				

- 2. In the **Validation** section, in the **Validation** field, select *Numbers only*. The **Regular Expression** field is filled in automatically.
- 3. In the **Maximum Length** field, enter 5.

Default Value:			
Help:	<u> </u>		Contact Us
	V		Title
Css Class:	scfSingleLineTextBorder		Name
Validation			Title E-mail
Validation:	Numbers only		,
Regular Expression:	^[-,+]{0,1}\d*\.{0,1}\d+\$		ZIP Code
Error Message:	×		Title Contact me about
	×		🚱 Add Field
Minimum Length:	0		Add Section
Maximum Length:	5		Add Sectori
	1-		Contact us
Analytics	_		
Tag:		:	
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.	1	

4. In the Error Message field, enter the text you want to be displayed in the error message.

Appearance		1	
Default Value:			
Help:			Contact Us
			Title
	¥.		Name
Css Class:	scfSingleLineTextBorder		
Validation		,	Title E-mail
Validation:	Numbers only		Title
Regular Expression:	^[-,+]{0,1}\d*\.{0,1}\d+\$		ZIP Code
Error Message:	ZIP Code must contain digits. 🛌		Title
			Contact me about
	v.		🔁 Add Field
Minimum Length:	0		Add Section
Maximum Length:	5		
			Contact us
Analytics			
rug.		1	
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.	•	



5. Click Save or Save/Close to save the changes.

This is how the error message looks on the form if the visitor enters any incorrect characters:

Contact Us		
Name	Gary	*
E-mail	g@gary.com	*
ZIP Code	3459D	
	ZIP Code must contain digits.	
Contact me about	Brochure	
	Pricing information	
	□ Sales events	
Contact us		



Chapter 4

Submit Actions

This chapter describes submit actions. When a Web site visitor clicks **Submit**, three types of actions are performed sequentially: form verifications, save actions, and success.

This chapter contains the following sections:

- Form Verification
- Save Actions
- Success



4.1 Form Verification

This is the first action performed in a form submission. Form verification allows you to verify the values that have been entered in one or more fields. This could be used, for example, to check a visitor's username and password or to verify the availability of a set of selected products against a product database. If form verification fails, the visitor is returned to the form, and the error message associated with the form verification is displayed. You can customize an error message for each individual form verification.

To customize a form verification:

- 1. Open the **Form Designer** and click the **Submit** button on a form.
- 2. In the left-hand pane, click the Form Verification link.

ontact us	
Form Verification	Edit
Use these actions to verify the data submitted in the for comparing the values with other data sources. If a Form Verification fails, the visitor is returned to the f	
[No actions specified]	
Save Actions	Edit
Use these to perform specific actions when a form is suc If a Save Action fails, the form is processed but the visit message.	
🐻 Save to Database	
P Register a Goal	
Success	Edit
When a form is successfully submitted, you can display a success message.	specific page or a
Success Page: [none]	
Success Message: Thank you for contacting us. One	of our anwhile, we hope vou

The Web Forms for Marketers module contains four default form verifications:

Assess Security Risk

This verifies the information entered in form fields for content that may be malicious. The content could be, for example, executable scripts or similar data. If verification fails, the message "The fields contain content that may present a security risk. Please enter appropriate information" is displayed.

This action is default for all web forms and you cannot remove it.

Note

Contact your Sitecore administrator to remove this form verification from the web form.

Check User and Password

This verifies the user name and password of the user in Sitecore. It uses the values in selected form fields to validate the Sitecore user's User Name, Password, and Domain. If verification fails, the message "The user name or password is incorrect" is displayed.

User Name:	E-mail address		•
User Password:			•
Domain:	extranet		•
		ОК	Cancel



Is User in Role

This checks if the user is in the selected Sitecore role. This is often used together with the *Edit Role Membership* save action. This verification fails if:

- The user is not a member of the role.
- The user is a member of the role.

	ion will fail.	ected role. You can select the scenaric	
User Name:	Your name		*
Domain:	extranet		• *
Role:			Edit
The form ver	ification will fail if:	$\ensuremath{\mathfrak{O}}$ The user is not in the role. $\ensuremath{\mathfrak{O}}$ The user is in the role.	
The form ver	incation will fail it:		

If verification fails, either "The user is not in the role" or "The user is in the role" message is displayed.

User Exists

This checks if the user has been created as a Sitecore user based on the values entered in the **User Name** and **Domain** fields. This is often used together with the *Create User* save action. This verification fails if:

- The user does not exist.
- The user already exists.

Vser Exists			
Oheck whether the user is	a Sitecore user.		
User Name: E-mail addres	S		•
Domain: extranet			•
The form verification will fail if:	The user does not exist.		
	C The user already exists.		
		ОК	Cancel

If verification fails, either "The user does not exist" or "The user already exists" message is displayed. You can create new verifications in the **Content Editor**.

4.1.1 Configuring an Error Message for a Form Verification

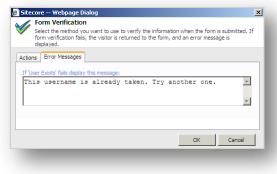
If a form verification fails, the Web Forms for Marketers module displays an error message. You can customize the error message for each individual form verification to ensure that the visitor receives the best possible information.

To customize a form verification error message:

- 1. Add a form verification to the form.
- 2. In the Form Verification dialog box, select the form verification and click the Error Messages tab.



3. Enter the text of the new error message and click OK.



Now, when the **User Exists** form verification fails, the new error message is displayed to the visitor.



4.2 Save Actions

The Web Forms for Marketers module allows you to assign actions to the form that will be performed when all form verifications are successfully completed and the visitor clicks the **Submit** button. These are called save actions and are very similar to form verifications, but will not return the visitor to the form if they fail.

To add a save action to a form:

1. In the **Form Designer**, click the **Submit** button on the form.

🥈 Tell a friend - Fo	orm Designer		
	Title Intro Footer English ~ To ascx > Dov Language Export Sorting	n SLast Properties Profiles Analytics	
Vinte Appearance Default Value: Rows: Help: Css Class: Validation Validation: Regular Expression: Minimum Length: Maximum Length: Analytics	Language Export Sorting 4 scfMultipleLineTextBorder No Validation 512	Analytics Close Tell a friend Tide Type Your Name Single-Line Tex Tide Type Friend's e-mail E-mail Tide Type Message Multiple-Line Tex Message Multiple-Line Tex	Required Required Required Required
Tag:	Select this checkbox to add the value of the selected field to the Tag' information in the OMS session report.	Yes, Share With My Friend	

2. In the left-hand part of the window, click the **Save Actions** link to open the **Save Actions** dialog box:

ctions Error Messa	ges		
ave Actions Save Actions/Cre	ate User	¥	Add
dded Save Actions:			
Save to Dat Save form da	tabase ta to the database		Edit
Create Use			Move Up
Register a System action	G oal n. Track a form goal		Move Down



3. In the Save Actions dialog box, expand the Save Actions drop down list



4. Select a save action and click **Add** to add it to the form.

To edit a save action, in the **Save Actions** dialog box, select the save action in the **Added Save Actions** field and click **Edit**.

To remove a save action, in the **Save Actions** dialog box, select the save action in the **Added Save Actions** field and click **Remove**.

4.2.1 Field Conditions

You can modify a save action so that it is only performed if the visitor selects certain values in the form. You use field conditions to do this. The following save actions contain field conditions:

- Edit Role Membership (Change Role Membership field)
- Register a Conversion (Register Conversion field)
- Send SMS (Send Message field)
- Send MMS (Send Message field)

Field conditions contain all the form list fields and check boxes. You select the condition that must be fulfilled before a save action is performed.



For example, your Web site contains the following **Contact Us** form:

Name		*
E-mail		*
Subscribe to a mo	nthly newsletter	
Contact me about	Brochure and monthly booklet	
	Prices and advertising actions	
	□ Sales events	
Contact us		

You want an SMS to be sent to the visitor if they select the **Subscribe to a monthly newsletter** and the **Sales events** check boxes.

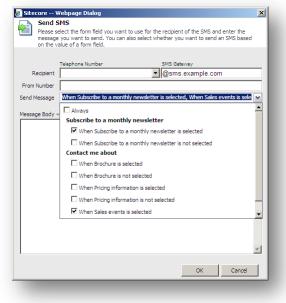
To send an SMS when certain conditions are fulfilled:

- 1. In the Form Designer, open the form and add the Send SMS save action.
- 2. In the **Send SMS** dialog box, in the **Send Message** field, click the arrow to open the list of form list items and check boxes:

	you want to send. You can also select whether you want to send an SMS based alue of a form field.
	Telephone Number SMS Gateway
Recipient	
From Number	
end Message	Always
Ĩ.	Always
lessage Body 👻	Subscribe to a monthly newsletter
	When Subscribe to a monthly newsletter is selected
	When Subscribe to a monthly newsletter is not selected
	Contact me about
	When Brochure is selected
	When Brochure is not selected
	When Pricing information is selected
	When Pricing information is not selected
	When Sales events is selected
	· · · · · · · · · · · · · · · · · · ·
	The second se
	OK Cancel



3. Clear the Always check box, and then select the When Subscribe to a monthly newsletter is selected and the When Sales events is selected check boxes:



4. In the **Send SMS** dialog box, fill in the rest of the fields and save the changes.

Now, when the visitor selects these fields, the Web Forms for Marketers module automatically sends an SMS message on their mobile phone.

4.2.2 Default Save Actions

The Web Forms module contains 16 save actions by default.

Save to Database

This save action saves the form data to a predefined database (by default it is a Sitecore Webforms database under SQLite). To view the stored data, click Sitecore, All applications ...to open the **Form Reports** application (*Sitecore – All applications – Web Forms for Marketers – Form Reports*).

The only parameter for this action is the connection string for the database that you want to use. This module allows you to use either MSSQL or SQLite databases. You can specify a database in the forms.config file. SQLite is used by default. To use MSSQL, comment the *SQLite* section and uncomment the *MSSQL* section.

Send Mail

This save action sends an e-mail every time a visitor clicks the submit button on a form. The recipient and body of the e-mail can differ for each form. The e-mail is sent using the SMTP protocol.

Field	Description
То	The addresses of the direct recipients of this e-mail message.
сс	The carbon copy (CC) recipients of this e-mail message.
Subject	The subject line of this e-mail message.
Body	The text of the e-mail message.

The item for this action contains the following fields:



Use a semi-colon (;) to separate addresses in the To and CC fields.

Click the **Insert Field** drop down list and select the form field whose value you want to insert into the body text. This could be the name field, e-mail field and so on.

The settings that are defined using this editor are stored in the form item.

To add the value from a form field to the **To/CC/Subject** fields, click the appropriate field name. This could be the name field, e-mail field and so on:

Sitecore	e Webpage Dialog	×
<u> </u>	nd Email Editor	
Cor	nfigure the template of your mail.	
To 👻	[E-mail]	
CC 🖛	info@nicam.net	
BCC		
Subject 👻	Nicam.net registration	
Insert Fiel	d 🔹 🕹 🖺 🖏 🦣 🖺 🗂 🤊 + (+ + 😣 🕞	
BI	<u>U</u> A - 🖏 -	
Dear [Na		
You have	been successfully registered at www.nicam.net	
You can	use your [E-mail] email address as a user name to log in to our site.	
If this is it.	not correct please go to www.nicam.net/changeaccount to change	

Send SMS

This save action sends an SMS message every time a visitor clicks the **Submit** button. The recipient and body of the SMS message can differ for each form. The SMS message is sent as plaintext.

	Telephone Number	SMS	6 Gateway		
Recipient	Mobile phone numb	er 💌 @s	sms.example.co	om	
From Number	+91 902 049 9777				
end Message	Always				~
lessage Bodil Dear [N informa	Name E-mail Mobile phone number ZIP Code	pr contacting to your [E-m			

The item for this action contains the following fields:

Field	Description
Recipient	The phone number and SMS gateway of the recipient of the SMS message. Use the drop-down list to select which form field to use for the recipient's phone number. Only SMS/MMS Telephone fields can be used with this action.



Field	Description
From Number	This field is filled in automatically depending on the method used to send the SMS. The default method is not set
Send Message	The condition that should be met before the SMS message is sent. By default the save action always sends the SMS message to the selected recipient. You can also choose to send an SMS message only when a specified check box or list value in the form is selected by the visitor. All the check box and list fields in the form are displayed in the Send Message dropdown list.
Message Body	The text of the SMS message. Click the arrow next to the Message Body to add the value from a form field to the SMS message.

Send MMS

This save action sends an MMS message every time a visitor clicks the **Submit** button. The recipient and body of the MMS message can differ for each form.

🐴 Sen	d MMS				
mess		i field you want to us send. You can also s i field.			
	Telephone	Number	MMS Ga	ateway	
Recip	ient Mobile p	ohone number	💌 @mm	is.example.com	ı
From Nur	nber +91 902	049 9777			
Send Mess	age Always				v
insert Field B <i>I</i> <u>I</u>	• 🅉 🐴 I A • 🗞 •	🖺 🖏 🦏 🛱	P - C	- 2 6	
	ne]. Thank you ail] e-mail add	u for contacting us iress.	l Additional inf	ormation will be	e sent to
				ОК	Cancel

The item for this action contains the following fields:

Field	Description
Recipient	The phone number and MMS gateway of the recipient of this MMS message. Use the drop-down list to select which form field of the SMS/MMS Telephone type defines the recipient's phone number.
From Number	The phone number which sends the MMS message.
Send Message	The condition that should be met to send the MMS message. By default the save action always sends an MMS message to the selected recipient. You can also choose to send MMS message only when a specified check box or list value in the form is selected by the visitor. All the check box and list fields in the form are displayed in the Send Message drop-down list. For more information about the conditional field, see in the <i>Field</i> section.
Message Body	The text of the MMS message. You can use the Rich Text Editor tools while composing a message. Click Insert Field to add the value from a form field to the MMS message. This exchanges the chosen field with the chosen value when the action is executed.



Create Item

This save action creates a new item in the content tree every time a visitor clicks the **Submit** button on a form.

To set up a Create Item save action:

- 1. In the Form Designer, open the form.
- 2. In the Save Action dialog box, click Edit to open the wizard for this action.
- 3. In the **Select template** dialog box, in the **Template** field, select the template that the items will be based on.

Sitecore Webp elect template Select a template	age Dialog and a destination for the iter	ns		×)
Template: Destination:	Sample/Sample Ite	em		Browse
		< Back	Next >	Cancel

- 4. In the **Destination** field, select the folder that the items will be stored in and then click **Next**.
- 5. In the **Mapping form fields** dialog box, you specify which values will be stored in which form fields for all future items that use the template.

I	
E-mail Title	
Password-Confirmation Not Defined	
First Name Display name	
Last Name Not Defined	
Country Not Defined	
Zip Code Not Defined	
Enter the text from the image Not Defined	
Zip Code Not Defined	
image Not Defined	

Select the **Show Standard Fields** check box to use the values from standard fields. This will automatically assigning names to the fields.



6. Click **Next** and the **Confirmation** dialog box appears.

ofirmation	
Confirm the mapping form fields to the it	em fields.
The template for items:	
Sample/Sample Item	
Items will be stored:	
• /sitecore	
Information from following field	lds will be lost:
 Password-Confirmation Last Name 	
Country	
 Zip Code Enter the text from the image 	
Phone number	
	< Back Next > Finish
	N DOLK IVEXU / THIST

The **Confirmation** dialog box displays a list of the fields and values that you have chosen. It also displays warnings in cases where information might be lost (for example where fields have no values mapped to them) or where fields may contain conflicting values.

7. After verifying your choices, click **Finish** to complete the configuration process.

Tell a Friend

This save action can be used by a Web site visitor to send a predefined e-mail to another person. This form uses the *Send Mail* save action.

Select fields	ge Dialog X
Set fields where	action takes parameters.
-	E-mail
From	
То	My friend's email
Mail	Write a message for your friend 💌
	OK Cancel

The action uses the values entered in specific form fields to compose the e-mail message. The **From** field should contain the sender of the message. The **To** field should contain the recipient, and the **Mail** field is used for the body of the e-mail.

Register a Campaign

This save action registers a visitor as a member of a campaign, after they successfully submit a form. When you edit this action, a dialog box appears that allows you to select a campaign event that you can associate with the form. You must associate *Campaign Events* with the form — associating the form with an overall campaign will not work. For more information about campaigns, see the *Online Marketing Suite Cookbook*.

Create User

This save action creates a new Sitecore user based on the information supplied by the visitor in specified form fields. This save action checks whether the user already exists and if the user does not exist a new user is created. If the user does exist the user's information is updated.

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To create the user, you must specify some basic information:

Create Us	er	
	orm field values which will be used to create the user. already exists, the user's information will be updated.	
lasic User Infoma	ation Additional User Properties	
The action will st	user name is unique, you must choose an email field. ore seleted field's content in the new user's email property. ill be created with the format <localpart_at_domain_dot_topleveldomain></localpart_at_domain_dot_topleveldomain>	
User Name:	E-mail 💌 *	
User Password:	Random Password	
Domain:	extranet 💌 *	
V	Associate new user with this visitor	
	OK Cancel	

The **User Name** field is a required field that is used to uniquely identify the user. You must select an e-mail field from the form to make the user name unique. This is created using the format: "localpart_at_domain_dot_topleveldomain." This means, for example, that a user with the "example@domain.com" e-mail address will be created with the user name "example_at_domain_com". The value of this e-mail will also be used as the new user's e-mail address (in standard e-mail format).

You must also specify the domain in which the user will be created. You can choose between all the domains available in your Sitecore installation. The *extranet* domain is selected by default.

The **User Password** field can be used to assign a password for the newly created user. *Random Password* is selected by default, and this option uses a randomly generated password. You can also choose to use the value of a password field in the form, or to leave the password blank.

Select the **Associate new user with this visitor** check box to link the visitor's browser, IP, and geographical information with the newly created user. This can be particularly useful if the Sitecore security model is used in conjunction with an external system, such as a CRM system.

In the **Additional User Properties** tab you can enter the information from any form field into a field in the Sitecore user profile. This also includes fields which may be mapped from other systems using a security provider.

•	core Webpage Dialog Create User	×
6	Select the form field values which will be used to create the user. If the user already exists, the user's information will be updated.	
Basic	User Infomation Additional User Properties	
-Cr	reate or update user Profile	
V	Overwrite user field if it already contains a value	
Fo	rm Field User Profile	
	Name 🔽 🖌 Full Name 💌 💥	
- Au	🗞 Add Fields udit	
Sa	ave Audit Information to: Don't Save	
	OK Cancel	1

The value entered in the field selected in the **Form Field** column, will be used as the value in the field selected in the **User Profile** column.

To add additional pairs of fields, click Add Fields.

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If you select the **Overwrite user field if it already contains a value** check box, all the form fields selected in the **Additional User Properties** tab will overwrite the corresponding user profile fields if the user already exists.

As the **Create User** save action modifies user profiles automatically, it may be useful to register what fields have been changed, and what the previous values were. The save action can register this type of audit information in a selected field in the user profile. In the **Save Audit Information to** field, select the field the audit information will be registered. You can save information to fields of the following types: Rich Text, html, text, Multi-Line Text, Single-Line Text and memo. The *Don't Save* option is selected by default, which means no information about field changes is saved.

Edit Role Membership

This save action adds a Sitecore user to a role, or removes the user from a role. If the user does not exist, the user is created, according to the guidelines described in the *Create User* save action. The user is created with a randomly generated password.

-		
Identify the User		
User Name:	E-mail	•
Domain:	extranet	*
Associate existing user v	vith this visitor	
Role Membership		
Change Role Membership:	Always	~
Add User to Role:		
		Edit
Remove User from Role:		
		Edit
Audit		
Save Audit Information to:	Don't Save	T

The user is identified based on the values selected in **User Name** and **Domain** fields.

Select the **Associate new user with this visitor** check box to link the visitor's browser, IP, and geographical information with the newly created user.

By default the save action always edits the role membership of the user. You can also choose to edit role membership only if a specified check box or list value is selected in the form on the Web page. All the check box and list fields in the form are displayed in the **Change Role Membership** dropdown list. For more information about the conditional field, see the *Field* section.

In the **Add User to Role** field, click **Edit** to open the **Edit User Roles** dialog box. Select the roles that you want to make the user a member of.



In the **Remove User from Role** field, click **Edit** to open the **Edit User Roles** dialog box. Select the roles that you want to remove the user from.

ne Edit	User Roles						
📁 Chang	e the roles that	the user is a m	ember of.				
elected Roles							
	1	1					
Add	Remove						
vailable Role:		1			_		
_	n to this area to	group by it.		S	earch:	_	
Role							
	tics Content Pro	-					
	tics Maintaining						
	tics Reporting						
itecore\Auth							
itecore\Desig							
itecore\Deve							
	ore Client Accou						
itecore\Sitec	ore Client Autho	ring					
itecore\Sitec	ore Client Config	Juring					
	ore Client Desigr	-					
	ore Client Devel						
itecore\Sitec	ore Client Forms	Author					
itecore\Sitec	ore Client Mainta	aining					
itecore\Sitec	ore Client Publis	ning					
itecore\Sitec	ore Client Securi	ng					
K	• [H		Page 1 o	f 2 (21 items)
					OK		Cancel

You can also search for a specific role.

As the **Edit Role Membership** save action modifies user profiles automatically, it may be useful to register what fields have been changed, and what the previous values were. The save action can register this type of audit information in a selected field in the user profile. In the **Save Audit Information to**, select the field the audit information will be registered. You can save information to fields of the following types: Rich Text, html, text, Multi-Line Text, Single-Line Text and memo. The *Don't Save* option is selected by default, which means no information about field changes is saved.

Change Password

This save action changes a Sitecore user's password.

🥖 Sitecore Wel		×
Change P		- 1
Change the	password of a user.	
User Name:	E-mail	•
Old Password:	Password	
New Password:	Password	
Domain:	extranet 💌	•
	OK Cancel	

The user is identified based on the values selected in the **User Name** and **Domain** fields. You can only use password fields in the form for the **Old Password** and **New Password** fields. The value of the field selected in the **Old Password** field is used to verify the username and password of the Sitecore user.

This save action will first verify that the user exists. If the user does not exist, no action is taken.

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User Login

This save action logs a Sitecore user in based on the values entered into selected form fields. This save action will log a user in even if no password is provided. The save action first verifies that the user exists. If the user does not exist, no action is taken.

	×
user is logged i ers.	in, even if no
	*
	_
	<u> </u>
ОК	Cancel
	ers

The field selected in the **User Name** field and the Sitecore domain selected in the **Domain** field are used to identify the user.

Select the **Associate existing user with this visitor** check box to link the visitor's browser, IP, and geographical information with the user.

As the **User Login** save action modifies user profiles automatically, it may be useful to register what fields have been changed, and what the previous values were. The save action can register this type of audit information in a selected field in the user profile. In the **Save Audit Information to**, select the field the audit information will be registered. You can save information to fields of the following types: Rich Text, html, text, Multi-Line Text, Single-Line Text and memo. The *Don't Save* option is selected by default, which means no information about field changes is saved.

User Login with Password

This save action logs a Sitecore user in based on values entered into selected form fields. It also checks whether or not the password provided is valid. The save action first verifies that the user exists. If the user does not exist, no action is taken.

Sitecore Wel	page Dialog	×
🐧 User Logi	n with Password	
Log a user in password is	based on the information entered in the form. The user is only logged in if the valid. This action works only for existing users.	
	er	-
User Name:	E-mail 💌 *	
User Password:	Current Password	
Domain:	extranet 💌 *	
- Audit -	Associate existing user with this visitor	_
Save Audit Infor	mation to: Don't Save	
	OK Cancel	
-	OK Cancel	

The field selected in the **User Name** field and the Sitecore domain selected in the **Domain** field are used to identify the user. The value that the user enters in the field selected in the **User password** field is used to authenticate the user.

Select the **Associate existing user with this visitor** check box to link the visitor's browser, IP, and geographical information with the newly created user.

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As the **User Login with Password** save action modifies user profiles automatically, it may be useful to register what fields have been changed, and what the previous values were. The save action can register this type of audit information in a selected field in the user profile. In the **Save Audit Information to**, select the field the audit information will be registered. You can save information to fields of the following types: Rich Text, html, text, Multi-Line Text, Single-Line Text and memo. The *Don't Save* option is selected by default, which means no information about field changes is saved.

User Logout

This save action logs a Sitecore user out if the form is submitted successfully. This action requires that the Sitecore user must be logged in.

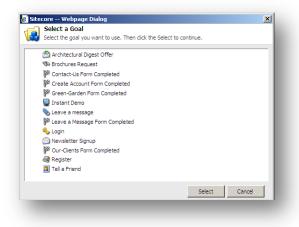
Register Conversion

This save action registers a conversion for an existing goal. This differs from the *Register Goal* system action which is specifically associated with the successful completion of the form.

	Register Con Register the sele only if a specific	ected goal as a	a conversion. Y elected.	ou can also cho	ose to registe	r a conversio	n
Regis	ster Conversion: Goal:	Always			[elect Goal	~
	Court				ок	Cancel	

By default the save action always registers a conversion for the selected goal. You can also choose to only register a conversion when a visitor selects a specified check box in the form. All the check box and list fields in the form are displayed in the **Register Conversion** dropdown list. For more information about the conditional field, see the *Field* section.

Click **Select Goal** to open the **Select a Goal** dialog box where you can select one of the existing goals:



Email Campaign Manager Integration

Email Campaign Manager lets you carry out large e-mail campaigns and analyze their results so you can continuously optimize your campaign results. The Subscribe to Target Audience and the Send Standard Message save actions provide integration between the Web Forms for Marketers module and Email Campaign Manager. Using the Subscribe to Target Audience save action you can subscribe Web site visitors to a target audience and then use the Email Campaign module to dispatch messages related to a specific topic. The Send Standard Message save action is usually used with the Subscribe to Target Audience save actions. It lets you send standard e-mail messages using the



Email Campaign Manager module. This means that you can use the functionality of the Email Campaign Manager module and personalize your automatically created e-mail messages.

Important

The Send Standard Message and Subscribe to Target Audience save actions require the Email Campaign Manager module to be installed. For more information about the Email Campaign module, visit <u>Sitecore Developers Network</u>.

Subscribe to Target Audience

Target audiences are used by the Email Campaign Manager to store distribution lists which are used to send emails. This save action subscribes the visitor to target audiences or unsubscribes them from target audiences every time the visitor clicks **Submit**.

To set up the Subscribe to Target Audience save action:

- 1. Add the Subscribe to Target Audience save action to a form and edit it.
- 2. In the **Subscribe to Target Audience** dialog box, in the Identify the user drop-down list, select how the email address should be identified:
 - Select Use the current visitor to subscribe the currently logged in visitor.
 - Select Use an existing user to subscribe the visitor whose name is entered to a form field. In the User Name field select the form field where the visitor enters the name. In the Domain field select the domains where the module will search for an existing user.
 - Select Use an email address to create and subscribe a new anonymous user based on an email entered in the form. In the Email field select the form field where the visitor enters the e-mail address.
- 3. Use the **Change Subscription** field to select conditions under which the save action is performed. For more information about the field conditions, see the *Field Conditions* section.
- 4. To subscribe the visitor to target audience:
 - o Click Edit in the Subscribe to Target Audience field.
 - In the Select Target Audiences dialog box, select the Target Audience that you want to subscribe the visitor to and add it to the Selected list using the arrow button.
 - Click **Ok** to close the **Select Target Audience** dialog box.
- 5. To unsubscribe the visitor from Target Audience:
 - Click Edit in the Unsubscribe from Target Audience field.
 - In the **Select Target Audiences** dialog box, select the Target Audience that you want to unsubscribe the visitor from and add it to the Selected list using the arrow button.
 - o Click Ok to close the Select Target Audience dialog box.
- 6. Confirmation mails let users confirm their email address and their desire to subscribe to a newsletter. In some countries such a mail is a legal requirement. To send a confirmation email to the user that is subscribed to a Target Audience, select the Send Confirmation Mail check box. If this check box is cleared, no confirmation email will be sent. An email informing the user that they were unsubscribed from Target Audience will be sent automatically in any case. Confirmation mails are configured in the Email Campaign Manager. Visit the <u>Sitecore Developer Network for the appropriate documentation</u>.

Send Standard Message

This save action allows you to send standard e-mail messages using the Email Campaign Manager module. This means that you can use the functionality of the Email Campaign Manager module and personalize your automatically created e-mail messages. Standard messages require membership of specific Target Audience. Use the **Subscribe to Target Audience** save action to do this.

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Here is an example of how to use the Send Standard Message save action.

You are a marketer. You have created a *Registration* form on the Web site.

- Necessary in	nformation	
Name		*
E-mail		*
Password		*
Confirmation		*
Subscribe me to	Monthly brochure newsletter	
	□ Sales events	
Create my account		

Visitors who submit this form should be subscribed to a newsletter and receive a notification informing them of this. Subscribe them to the newsletter using the Email Campaign Managers functionality. This is done by adding them to a Target Audience role. In this example this role is called "Subscribers".

To perform this task, you have to add the Subscribe to Target Audience and Send Standard Message save actions. The Subscribe to Target Audience save action adds user to the role that you use in the Email Campaign Manager for the specific target audience. The Send Standard Message save action sends a standard message of the Email Campaign Manager module to the recipient.

- 1. Start editing the form.
- 2. If you want to subscribe visitors to a newsletter, use the *Subscribe to Target Audience* save action.
- 3. Add the Send Standard Message save action to the form.
- 4. Edit the Send Standard Message save action. In the Message & Recipient Wizard:
- 5. In the **Standard Message** field browse to the standard message of the needed target audience.

& Recipie the stand essage to.		that you wa	ant to send	l and the	user that you v	vant to sen	1 67
	ard message	that you wa	ant to send	l and the	user that you v	vant to sen	
-							
Message	Subscrip	tion Confir	rmation			Brov	vse
for the se	nd confirmat	ion receipt					
message	to						
address o	of the curren	t visitor					
address	of an existing	user					
user name	is based on i	information	entered in	form field	s:		
Name:	Name						• *
ain:	sitecore						• *
	,						_
				< Back	Next >	Ca	ancel
	for the se message address o	for the send confirmat message to address of the curren address of an existing user name is based on Name: Name	for the send confirmation receipt message to laddress of the current visitor laddress of an existing user user name is based on information Name: Name	message to laddress of the current visitor address of an existing user user name is based on information entered in Name: Name	for the send confirmation receipt	for the send confirmation receipt ressage to laddress of the current visitor laddress of an existing user user name is based on information entered in form fields: Name: Name: Sitecore	for the send confirmation receipt message to laddress of the current visitor address of an existing user user name is based on information entered in form fields: Name: Name: Sitecore

- 6. Select the **Wait for the sent confirmation receipt** check box to receive confirmations and record any accompanying events to the reports. Clearing this check box may increase performance but failures will not recorded in the form reports.
- 7. In the **Recipient** section select the recipient of the e-mail. Select **the Email address of the current visitor** option to send an e-mail to the currently logged in visitor. Alternatively select the **Email address of an existing user** option to send an e-mail on the email entered in the form.



8. In **the Personalize Message** step, enter form fields or other values which replace tokens in the message.

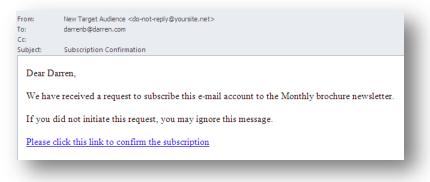
In our example, the *targetaudience* token will be replaced with the list value that the visitor selects in the **Subscribe me to** field. The *visitor* token will be replaced with the value that the visitor entered to the **Name** form field.

ersonalize M			
do this by c		th information stored in form fields. You n_name\$ in the standard message and the message by clicking 'Next'.	can 🔯
Select a form f	eld whose values will be displayed	in place of the token.	
linł	•		
targetaudience	▼ [Subscribe me to]		
visitor	- [Name]		
		< Back Next >	Cancel

Preview the message and click Finish.

eview Message	6	
	nce of the message you have selected and modified. e result and 'Back' if you wish to change the message.	9
		_
rom: New Target Audience <do-not ubject:: Subscription Confirmation</do-not 	t-reply@yoursite.net>	
Dear [Name],		
We have received a request to [Subscribe me to] newsletter.	subscribe this e-mail account to the	
If you did not initiate this reques	st, you may ignore this message.	
Please click this link to confirm	the subscription	
	< Back Finish Cance	

When the visitor submits the form, they receive the following notification on the specified email address:





4.2.3 Configuring an Error Message for a Save Action

If a save action fails, the Web Forms for Marketers module displays the following error message by default: "We experienced a technical difficulty while processing your request. Your data may not have been correctly saved."

You can compose an error message for a save action.

To create an error message for a save action:

- 1. Add a save action to the form.
- 2. In the Save Actions dialog, select the save action and click the Error Messages tab.
- 3. Enter the text of the new error message in the text field and click OK.

🔊 Sa	ve Actions					
				ıbmitted. If a Save n an error messag		the
Actions	Error Messages	5				
If 'Send	Mail' fails display	this message:				
				ent to your		-
	ne moment nvinience.	due to serv	er proble	ms. Sorry f	or the	-1
I						
					1 -	. 1
				OK	Can	icel

Now, when the Send Mail save action fails, the new error message is displayed to the visitor.



4.3 Success

This submit action allows you to select either a Sitecore item or a message which is presented to the visitor after they successfully submit a form. This is the final action performed in a form submission. When the visitor successfully submits a form, success message is displayed on the current page in place of the form, by default. To redirect the visitor to any other page, use success page.

To select a success message or page:

- 1. In the **Form Designer**, click the **Submit** button on the form.
- 2. In the left-hand panel, in the Success section, click Edit:

Contact us	
Form Verification	Edit
Use these actions to verify the data submitted in the form, f comparing the values with other data sources. If a Form Verification fails, the visitor is returned to the form [No actions specified]	
Save Actions	Edit
Use these to perform specific actions when a form is success If a Save Action fails, the form is processed but the visitor is message.	
🐻 Save to Database	
🏁 Register a Goal	
Success	Edit
When a form is successfully submitted, you can display a spe success message.	ecific page or a
Success Page: [none]	
Success Message: Thank you for contacting us. One of	our

3. In the **Success** dialog box, select the **Success Page** check box and browse to the page that you want to redirect the visitor to.

Success Select a page or create a success message to display when the form is successfully C Success Page C Success Message Thank you for filling in the form.	🥖 Sitecore Webpage Dialog		×
□ sitecore □ Standard-Items □ Standard-Items □ Our-Services □ Our	Select a page or create a success message to display when the form is successfully		
© Content © Content © Standard-Items © Our-Process © Our-Services © Success © Design-Inspiration © Pesign-Inspiration © News-and-Events ♥ Success Message Thank you for filling in the form.	© Success Page		
News-and-Events Success Message Thank you for filling in the form.			
×	🖲 🧼 News-and-Events	•	
OK Canrel	Thank you for filling in the form.	×	
	OK Can	cel	

Alternatively, select the **Success Message** check box and enter a message in the field. This message is displayed in place of the form, after the form has been submitted successfully.

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Chapter 5

Analytics and Reporting

This chapter describes main principles of working with analytics in the Web Forms for Marketers module as well as how to view and understand reports.

This chapter contains the following sections:

- Forms and Analytics
- Understanding Reports
- Events and Session Trail



5.1 Forms and Analytics

The Web Forms for Marketers module provides functionality for recording and reporting visitor information. The module implements Online Marketing Suite (OMS) features and adds its own features based on the OMS API.

5.1.1 Enabling Analytics in Forms

The analytics features for a form can be configured when you create a new form. For more information about creating a new form, see the *Creating a New Form* section.

To configure the analytics features, in the Forms Designer in the Analytics group, click Properties.



Select the **Enable Marketing Analytics** field to associate goals and campaigns with forms and track when visitors attempt to submit forms:



5.1.2 Associating Goals with Forms

When you create a form, a goal named "Form_Name Form Completed" is created and associated with the form by default.



In the **Create a new from** wizard, in the **Analytics** dialog box you can create and assign a new goal to the form. Alternatively you can select an existing goal from the list and associate it with the form:

	ptions you want to use with this form.				
Enable Marketing Analytic	25				
Select this checkbox to a enabled.	ssociate a goal with this form. Other analytics f	unctionality is also			
Goal					
C Create a new goal					
Leave a message i	Form Completed				
Select an existing g	joal				
Select existing	Select existing goal				
Select a new or exis	🖄 Architectural Digest Offer	ed.			
Enable Form Dro	🐄 Brochures Request 📃 Instant Demo				
	S Leave a message				
Select this checkbox reports containing de	A Login	2			
If this is enabled any the visitor completes	Newsletter Signup	hether			
the visitor completes	Register				
	🔝 Tell a Friend				
		ncel			

Only one goal and/or one campaign can be associated with each form.

5.1.3 Configuring Profile Values for Associated Goals

To configure profile values for a goal associated with a form:

1. In the Form Designer, in the Analytics group, click Profiles.

	To ascx Export Sorting	♣ First	Profiles lose
comparing the values with other data sources. If a Form Verification fails, the visitor is returned to the form [No actions specified]		Title Last N	ame
🌽 Save Actions	Edit	Title Countr	~
Use these to perform specific actions when a form is success	sfully	· · · ·	,



2. In the **Profiles** window, set the content profile values.

Web site.		are of the visito	r's interests as	alcy haviga	te unough you
Focus:					
Background:					
		\bigcirc			
		4			
Practical:					
1					
Process:					
	3				
Scope:					
		7			
Function:					
Building Trust					
~					
Call to Action:					
Con to recom					

For more information about profile analytics values, see the OMS Cookbook, Chapter 3, Assigning Analytics Values to Content Items.

5.1.4 Associating a Campaign with Form Submission

You can associate a campaign with a form to make the visitor a member of a campaign when they successfully submitted the form.

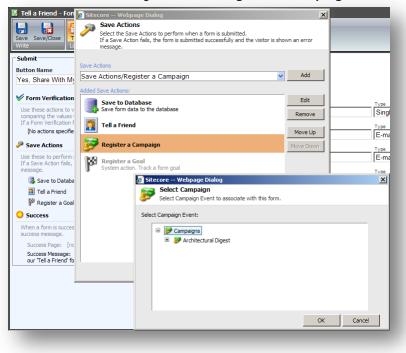
To trigger a campaign event upon form submission you must add the appropriate *Register Campaign* action to the form's Save Actions list.

To associate a campaign with the form:

1. In the Form Designer, in the Save Actions sections, click Edit.



2. In the Save Actions dialog, select the Register a Campaign action and click Edit.



3. In the **Selected Campaign** dialog box, select the campaign event that you want to make the visitor a member of.

5.1.5 Conversion of Goals

A "*conversion*" occurs when a specific goal is completed by a visitor. In the Web Forms module, a goal is converted when a visitor submits a form successfully.

When you create a form an associated goal is also created automatically. This goal is called "Form_Name Form Completed" (see the *Copying an Existing Form in the Page Editor* section, step 8).

When a form is filled in and submitted successfully, a conversion of the goal is recorded in the Analytics database (for more information about goals, see the *OMS Cookbook, section 3.2 Associating Goals with Items*).

If a *Register Goal* save action fails, the *Submit Success Event* is still registered, but the *Goal Conversion* event is not registered.

To attach profile values to the successful submission of forms in the **Form Designer**, click **Profiles**. This attaches the profile values to the goal associated with the form (for more information, see the *OMS Cookbook, Chapter 3 Assigning Analytics Values to Content Items*).

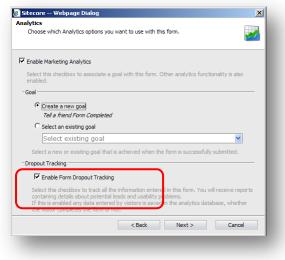
5.1.6 Form Dropout Tracking

The Web Forms module supports the creation of Form Dropout reports which contain information about visitors who did not successfully submit forms, but may still have entered information into those forms. For more information about the *Form Dropout* report, see the *Form Dropouts Report* section.

The Form Dropout reports could be, for example, e-mailed every morning to Frontline sales staff so that they can contact potential sales leads who have shown interest in a product or service, but have not successfully registered their details in a form.



When you create a form, use the **Enable Form Dropout Tracking** check box to turn dropout tracking on and off:



To enable or disable dropout tracking of an existing form, open the form in the **Form Designer.** Click the **Properties** button on the ribbon to open the **Analytics** dialog box.

Important

The values entered in the password, password-confirmation, and credit card fields are not tracked.



5.2 Understanding Reports

You can see information about visitor activity on forms in various reports provided by the module. To open *Form Reports*:

- 1. In the **Page Editor**, click the form.
- 2. Click the **Edit** button **S**.
- 3. In the Form Designer, click Form Reports.

You can also open Form Reports in the Sitecore Desktop or Content Editor.

The following reports are available:

- Data
- Summary
- Dropout Report
- Usability Report
- Save Failures Report

5.2.1 Data

This report provides detailed information on the responses to the current form. This report displays all the information entered by visitors in forms that have been successfully submitted. Only forms which have the *Save to Database* save action assigned to them are included in this report.

View Columns	Open 🖻	Operation		Switch to	_
Data Summary	Dropout Report	Usability Report Save Failure	Report		
Drag a column to this ar	-			Search:	
Created	Name	Email	Phone Number	You want to request	
15.10.2009 16:04:41	Ronald Selby	rselby@livesoft.com	+33 487-952-714	Brochures, Being contacted by a sales representative	
15.10.2009 16:11:19	Carles Silva	carless@pcw.com	+1 875 521 487	Being contacted by a sales representative	
15.10.2009 16:14:19	Jacky Burnett	jb@burnett.com	+1 667 820 057	Pricing information	
15.10.2009 16:42:28	Dale Cooper	coop@twinpeakscore.net	+45-5568-66668-87	Brochures, Pricing information	
15.10.2009 16:42:54	Peter Edbon	peted@edbon.com	+1 305 986 6445	Being contacted by a sales representative	
15.10.2009 17:07:21	Steven Perry	sp@perry.com		Being contacted by a sales representative, Pricing information	
15.10.2009 17:10:03	Korry Peanch	kp@startlab.com		Being contacted by a sales representative	
15.10.2009 17:23:46	Korry Peanch	kp@startlab.com		Being contacted by a sales representative	
15.10.2009 17:26:11	Korry Peanch	kp@startlab.com		Being contacted by a sales representative	

You can sort data by clicking any column name or drag a column to the black area to group information as you wish.

5.2.2 Summary

This report provides detailed information about the current form. It contains statistics about how many times each field was filled in and the values that were entered into the field. By default, in this report



each field displays no more than 3 records. However, you can change this value.

Efresh Open R	count			-		-
ata Summary Dro	pout Report Usability Report	Save Failure Report				
	Contact Us Detailed summary:					
	Field Name		Responses		Total number	Reset All
	Name — Form	Field	11		_ Total number	Reset
	💌 Email		11		of field records	Reset
	Phone Number		11			Reset
	You want to request		16			Reset
Values			4	25%		
Values	Brochures		-			
Values entered by	Brochures Being contacted by a sales rep	presentative	7	43,75%		

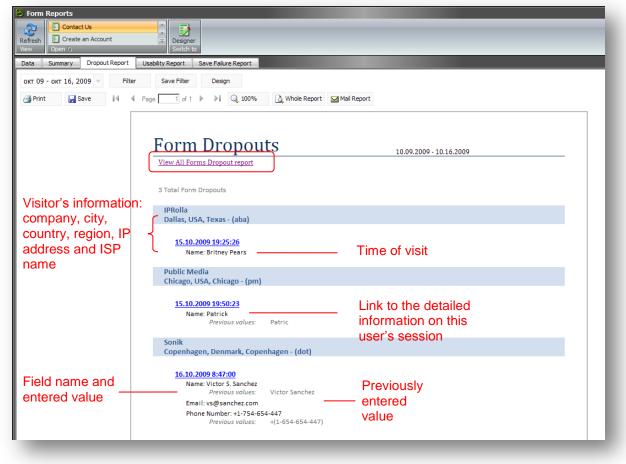
You can use this report to analyze the most popular entered values, in specific fields. For example, this sample report tells us that most of the visitors want to be contacted by a sales representative.

5.2.3 Form Dropouts Report

This report is available if the **Enable Form Dropout Tracking** check box was selected while creating or editing the form. The *Form Dropouts* report lists the failed form submissions which ended without the visitor successfully completing and/or submitting the form before the end of their session. It contains all the values entered in the form fields during the entire session.



The Form Dropouts report looks like this:

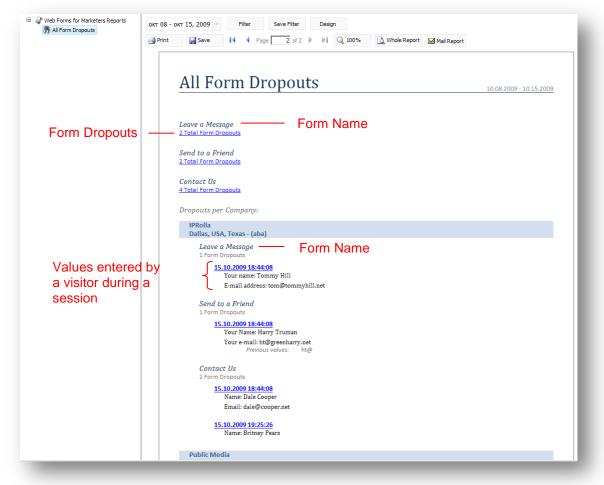


This sample report tells us that *Victor S. Sanchez* wanted to contact us, but he has not clicked **Submit**. The visitor's phone number and e-mail are displayed in the report. A sales representative could use this to contact this visitor.

The *Form Dropouts* report is specific to the current form. If you want to see information on dropouts for all the forms on your Web site which have Analytics enabled, click the *View All Forms Dropout*



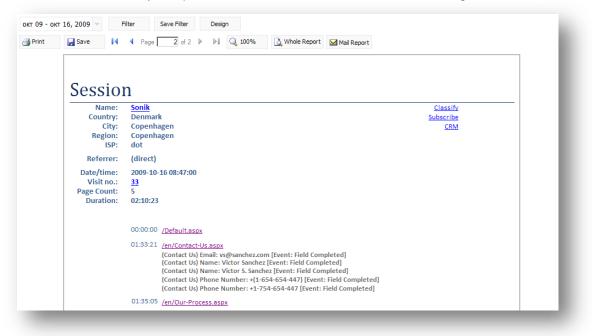
report link to open the All Forms Dropout Report by.



You can also see detailed information about the visitor's session in the *Form Dropout* report and the *All Forms Dropout* reports. Click an appropriate link with a timestamp and the *User Session* report for that visit is displayed. In this report, you can see information about the pages that the selected visitor



has visited, the forms they completed, as well as event, errors, and converted goals.



For more information about the session trail, see the Events and Session Trail section.

5.2.4 Form Usability Report

This report is available if the **Enable Form Dropout Tracking** check box was selected while creating or editing the form. The usability report lists both the form sessions that successfully submitted the current form and those which resulted in form dropouts. If any errors occurred, these are also listed in the report.

This information could be used, for example, by marketing staff to analyze the form's usability and the usage patterns of visitors. They can use this information to improve usability and ensure a higher conversion rate.

The *Form Usability Report* lists all the information entered in the current by each visitor, any errors or failures they encountered, and the timestamps of the start and end of the session(s), as well as a successful submission if one occurred. It also shows the previous and next page visited by the visitor. Click on each failure type to view all the data entered in all the fields prior to the failure.



The Form Usability Report looks like this:

Form Reports	
2 Contact Us	
Refresh Create an Account	Example 2 Segment 2 Segmen
View Open 🕫	Switch to
Data Summary Dropout Report Usabi	lity Report Save Failure Report
окт 09 - окт 16, 2009 🔻 Filter	Save Filter Design
Print 🕞 Save 🚺 🖣 Page	2 of 2 🕨 🕅 🔾 100% 🗋 Whole Report
	Form Usability Report
	Contact Us 10 Visits 9 form submission attempts 9 errors and failures 6 successful submissions 4 dropouts
	1,00 average errors in all attempts 0,89 average errors in success cases 0,25 average errors in dropouts
	Overall Errors: 5 Form Save Action Failure 4 Invalid Field Syntax
	irrors in Dropouts: 1 Invalid Field Syntax
	ast Error Before Dropout: 1 Invalid Field Syntax
	Dverview per Form Session
	IPRolla Dallas, USA, Texas - (aba)
	16.10.2009 10:41:29 Failed final 0 Form Submission Attempts submission attempt Final Submission Result: Dropout submission attempt Last Error Before Dropout: Invalid Field Syntax: Email contains an invalid address. submission attempt
Successful final submission attempt —	15.10.2009.18:44:08 1 Form Submission Attempt Final Submission Result: Success



To see detailed statistics about a particular visitor's session, click the appropriate timestamp link. This will generate the *Detailed Usability Report*.

Form Reports	
Refresh View Open 10 Create an Account Designer Switch to	
Data Summary Dropout Report Usability Report Save Failure Report	
окт 12 - окт 19, 2009 👻 Filter Save Filter Design	1
Print Save I Page 1 of 1 P I Q 100%	
Detailed Usability Report	
Form Usability Sonik Copenhagen, Denmark, Copenhagen - (dot) <u>Classify / Subscribe / CRM</u>	
Contact Us — Selected form <u>16.10.2009 10:41:29</u> Previous page	
Previous Page: /en/Our-Process.aspx Form Page: /en/Our-Process/Site-Audit.aspx Form page Name: Luciano Perrotti Email: Ip@perrotticom	
Invalid Field Syntax: Email contains an invalid address. Error message always Name: Luciano Perrottini Email: Ip@perrottinicom Invalid Field Syntax: Email contains an invalid address. You want to request: Brochures You want to request: Brochures, Being contacted by a sales representative	
Final result of the submission, can be: Success or Dropout Form content on leaving page:	
Name: Luciano Perrottini Email: lp@perrottinicom Phone Number: You want to request: Brochures, Being contacted by a sales representative	
Next Page Visited: [exit] Next page	_

This report provides you with detailed information about the selected visitor's activity on the form. It lists all the values the visitor has entered and describes all the failures that occurred.

This sample *Detailed Usability Report* indicates that the visitor *Luciano Perrottini* didn't put the "." symbol in the e-mail address and as a result he got a syntax error. All form errors are displayed in red.

The report displays the following information on the visitor's activity:

- Previous page the previous page the visitor visited in the session. This is usually the page the visitor navigated from to get to the form page.
- Form Page the page the form appears on.
- Next Page the page the visitor navigated to from the Form Page. If the value is [exit] the visitor navigated away from the site or closed the browser.

The *Form content on leaving page* section displays the values which were in the form fields when the visitor closed the browser or navigated to another page.



Captcha Redirection Information

The Detailed Usability report displays additional information if you use the Captcha field redirection on the form. In this case the Detailed Usability report displays information about the page where the visitor has been redirected to. This might appear as displayed in the following image:

Form Submit	
Form Threshold Exce	ded: the form has been submitted more than 3 times in 1 minutes
Next Page Visited: /en/si	ecore/system/Modules/Web Forms for Marketers/Attack Protection/Suspicious Form Activity.aspx?
scwfmformkey=ACD3504	571E74322AECC85C25DFB2C8B&scwfmformid=%7b5BDCD55C-66F1-409C-A3BB-AAD8DF743206%
7d&scwfmformplacehod	er=content&scwfmpageitem=%7b430F4003-9DC9-42D3-A303-E69E39E3B5F7%7d&scwfmprevpage=%2fOur-
Services.aspx%3fscwfmf	rmkey%3dAC7DB5DFBF334B57A6B1DDA8380A0E15
	ices.aspx?scwfmformkey=AC7DB5DFBF334B57A6B1DDA8380A0E15
Form Page: /en/sitecore/	system/Modules/Web Forms for Marketers/Attack Protection/Suspicious Form Activity.aspx?
scwfmformkey=ACD3504	571E74322AECC85C25DFB2C8B&scwfmformid=%7b5BDCD55C-66F1-409C-A3BB-AAD8DF743206%
7d&scwfmformplacehod	er=content&scwfmpageitem=%7b430F4003-9DC9-42D3-A303-E69E39E3B5F7%7d&scwfmprevpage=%2fOur-
Services.aspx%3fscwfmf	ormkev%3dAC7DB5DFBF334B57A6B1DDA8380A0E15

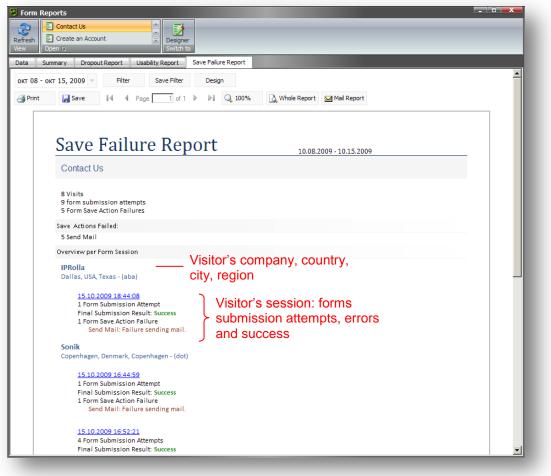
For more information about the Captcha field, see the Captcha Field section.

5.2.5 Save Failure Report

This report is available if the **Enable Form Dropout Tracking** check box was selected while creating or editing the form. The failure report contains information about all form sessions with failed save actions. The main purpose of this report is to allow marketing, administration, or technical staff to review any submissions which may not have succeeded, in order to take appropriate action, by, for example, manually registering failed submissions in the database.



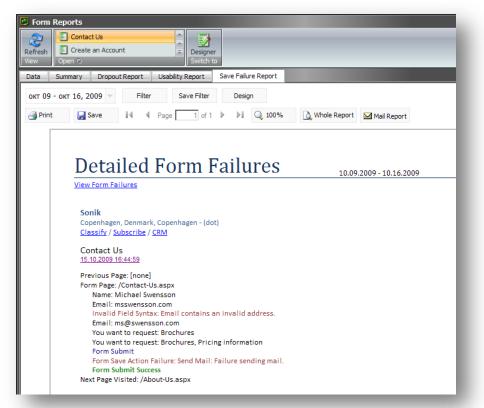
In general, the Save Failures Report looks like this:



This sample report tells us that two e-mails to the fiends of two visitors haven't been sent, but all the forms were completed successfully. To get more detailed information about the form failures, click the



appropriate timestamp link and the Detailed Form Failures report is displayed:



This report displays detailed information on fields values, errors occurred and successful form submissions. This sample report tells us that two e-mails haven't been sent because visitors entered invalid e-mail addresses.

5.2.6 The Form Reports Ribbon

The Form Reports ribbon allows you to select actions and views related to Form Reports:

	Refresh View Columns	Leave a message (2)	Delete - Archive -	To Excel - To Xml - Export	Archive Designer Switch to
--	-------------------------	---------------------	--------------------	-------------------------------	-------------------------------

- Click View/Refresh to reload from data.
- Click Columns/Select to choose the set of columns you want to see in the application.
- Click **Open** to display the selected form and its related data.
- Click Operations/Delete to remove selected records from the data grid. Click Delete All to remove all the records from the database.
- Click **Operations/Archive** to move selected records in the data grid to the archive. Click **Archive All** to move all the records to the archive.
- Click Export/To Excel to export selected records to an Excel document. Click All to Excel to
 export all the records to the Excel file.

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- Click Export/To Xml to export selected records to the xml format. Click All to Xml to export all the records to the xml format.
- Click **Switch to/Archive** to load form data from the archive.
- Click Switch to/Designer to open the active form in the Form Designer.

5.2.7 Reports Statistics

The *Dropout*, *Form Usability* and *Save Failures* reports contain a report statistics section, which provides you with general form usage information. For example, the *Form Usability Report's* statistics section looks like this:

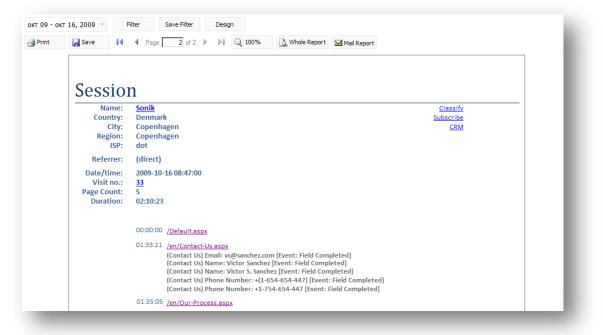
Form Usability Report	10.09.2009 - 10.16.2009
Contact Us	
10 Visits 9 form submission attempts 9 errors and failures 6 successful submissions 4 dropouts 1,00 average errors in all attempts 0,89 average errors in success cases 0,25 average errors in fooots	

You can use these statistics for general analysis of whether the form is meeting its defined aims or not, as well as usability analysis.



5.3 Events and Session Trail

The session trail is an OMS feature which records all the activities a visitor has performed on the Web site, including what pages they visited and when. If you have the Web Forms for Marketers module version 2 installed and analytics enabled, the session trail will also show every entry into every field in the form, and all the errors the visitor encountered.



In the session trail the form field entries are indicated by:

(Contact Us) Name: Victor Sanchez

Which corresponds to:

(Form Name)Form Field: Value

This string:

(Contact Us) Form Submit

indicates:

(FormName) Event or Error

After a successful submission the converted goal will be displayed:

Contact Us Form Completed [Goal]

The events that may be in the Form reports are described in the following sections.

Field Completed

This event occurs when a field on a form is completed and tabbed or clicked out of. Several field events on the same field are possible in the same form submission attempt, as visitors may change the information in the fields.

Field Not Completed

This event is triggered when validation on a required field fails, due to that field not having been filled in by the visitor.



Field Out of Boundary

This event is triggered when validation in a field fails due to the value entered failing outside the allowed boundaries of the field. For example, if the numbers entered, fall outside of the specified minimum or maximum values.

Form Verification Error

This event is triggered when a form verification fails. If a form verification fails, the visitor is returned to the form.

Form Save Action Failure

This event is triggered when a save action fails. Please note that this is a failure and not an event.

Form Submit

This event is triggered when the visitor clicks the **Submit** button or presses ENTER. This indicates a form submission attempt, which may result in success or failure.

Invalid Field Syntax

This event is triggered when validation on a field fails due to failing a particular a validation checking for a particular format or set of characters. This can include validations such which check whether a field is in e-mail format, or whether a **Number** field contains numbers.

Submit Success

This event is written when the Submit action does not return an error, and indicates a successful form submission.

Form Conversion

The event is triggered by the successful form submission attempt and comes after the *Form Submit* event. It also indicates the successful completion of the *Goal* associated with the form.

Form Threshold Exceeded

This event is triggered when a robot submitted a form or any of the submit thresholds exceeded. The thresholds are configured in the Captcha field settings. For more information about the Captcha field, see the *Captcha Field* section.



Chapter 6 Localization

This chapter describes how to localize Web forms.

This chapter contains the following sections:

Form Localization



6.1 Form Localization

The Web Forms for Marketers module allows you to localize forms, by translating individual field names and other form information to other languages or dialects. The forms created in the Web Forms for Marketers module can be fully translated into other languages. Multilanguage support is implemented for:

- Form fields.
- Error messages.
- List items.
- Success pages and messages.

Before you localize any Web forms, make sure that the required languages are added to the Sitecore solution. Contact your Sitecore administrator if the language you need is not available.

6.1.1 Localizing Form Fields

Web Forms for Marketers allows you to translate form fields into any language.

To localize the form fields:

- 1. Open the form in the **Form Designer**.
- 2. In the **Language** group, click the current language to display a list of the language versions that are available.



- 3. Select the language that you want translate the form to.
- 4. Name the fields of the form. By default, the first time the form appears the field names are blank with a help text in the original language: "Enter the name of the field_name field". Unnamed fields and sections are deleted from the form. If you change the type of the field, it is also changed in every language version of the form. Changing the field type may result in



the loss of the data stored in the field.

Contact-Us - For Save Save/Close Write Appearance Default Value: Help:	Title Introduction Footer German - To ascx	▶ Up ✓ Dow orting	Rist Properties Profiles Switch to Cose Contact-Us			
Css Class: Analytics Tag:	scfSmsTelephoneBorder		Title Name Title Mail Title Mobil funk nummer	Type Single-Line Text	Required Required Required Required	×
	report.		Tele Enter the name of the 'ZIP Code' field Add Field Submit	Type Checkbox	Required	

5. Save the changes.

6.1.2 Localizing Field Error Messages

Web Forms for Marketers allows you to translate form field error messages into any language. For more information about field error messages, see the *Configuring Field Error Messages* section.

To localize a form field's error message:

- 1. Open the form in the Form Designer.
- 2. In the **Language** group, click the current language to display a list of the language versions that are available.



3. Select the language that you want translate the form to.



4. Enter the translated text of the field error message.

ave Save/Close	Title Introduction Footer Language Sort
Appearance	
Default Value:	
Help:	×
Css Class:	scfSingleLineTextBorder 💌
Validation	
Validation:	Numbers only
Regular Expression:	^[- +]{0 1}\d*\ {0 1}\d+\$
Error Message:	
Minimum Length:	,
Maximum Length:	256

5. Save the changes.

6.1.3 Localizing List Items

The Web Forms for Marketers allows you to translate the forms into any language. List items contain predefined values that can also be translated. For more information about list items, see the *List Field* Types section.

Manually Entering Names

If you use the *Manually Entering Names* method to set list values, follow these steps to localize list items:

- 1. Open the form in the Form Designer.
- 2. In the **Language** group, click the current language to display a list of the language versions that are available.



3. Select the language that you want translate the form to.



4. In the Form Designer, select the list field:

orm Designer		_ 0 <mark>X</mark>
Title Introduction Footer German - To ascx	Down Stast Properties Profiles Form Reports Close	
2 items		
	Contact-Us	
Sales		
		Required
Yes		
	Mail E-mail	Required
	Title Type	Required
•	Kontaktieren Sie mich bezüglich Drop List	E 🐹
scfDropList	Add Field	
	Add Section	
Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.	Submit	
	Impoduction Footer German v To asculate to a schedule to a schedul	Introduction Foote Image: Sector 1 Image: Sector 2 Image: Sector 2

5. In the **Items** field, click the button to open the **List Items** dialog box.

🔗 Sitecore Webpage Dialog			x
List Items Select the values and text to display Sitecore items or queries to use.	/ in the list. You can	manually enter these or use	
Set items by Manually entering	names		•
		Display values as text on the	form
🎒 Value	Text	German	
Sales	Enter a text to	display on the form	\otimes
Brochure	Enter a text to	display on the form	\otimes
		OK Cancel	

In the List Items dialog, the Value values contain the original language version.

- 6. Click **Display a different text on the form** if the **Text** field is hidden and enter the **Text** values. Use global **Value** values and local **Text** values.
- 7. Save the changes.

Selecting Sitecore Items

If you use the **Selecting Sitecore Items** to set list values, you must translate the items that will be used as list values before localizing list items.

To localize list items:

1. Open the form in the **Form Designer**.



2. In the **Language** group, click the current language to display a list of the language versions that are available.



- 3. Select the language that you want translate the form to.
- 4. In the Form Designer, select the list field:

🕈 Contact-Us - F	Form Designer				- 0 🛋
Save Save/Close	Title Introduction Footer German ~ To ascx Layout Export	 ▲ Up ♦ Do Sorting 	wn 😻 Last Properties Profiles Form Reports Clo	se	
List Items: Selected Value:	3 items		Contact-Us		
Empty Choice:	Pricing information		Tide Name	Type Single-Line Text	Required
Appearance			Title Mail	Type E-mail	Required
nep.	×		⊤ide Kontaktieren Sie mich bezüglich	Type Drop List	Required
Css Class:	scfDropList	1	Add Field		
Analytics		_	Add Section		
Tag:		1			
	Select this checkbox to add the value of the selected field to the "Tag" information in the OMS session report.		Submit		

5. In the **Items** field, click the button to open the **List Items** dialog box:

et items by	Selecting	g Sitecore item	S		
elected Root Item	/sitecore/	content/Home/	Customers inform	ation	Browse
Value	Field:	_Item Name 💌	Text	Field:	Item Name 💌
Brochure			Brochure		
Pricing information			Pricing information		
Sales events			Sales events		

6. In the **List Items** dialog box, click **Browse** to select the root item of the list values. By default, Sitecore displays the **Item Field** value of the item as list value, but you can select any other item field to display.

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7. To select another item field, click in next to [_Item Name] in the Text column and select the field:

Sitecore item:	lues and text to display in th s or queries to use.				
et items by	Selecting Sitecore item	IS			
elected Root Item	/sitecore/content/Home	/Customers informa	ion Br	owse	•
alue	Field:Item Name 🔊	Text	Field: Advan	red	
rochure		Brochure	Trac	kina	
ricing information		Pricing information		andard values	
ales events		Sales events	Appear		
				em Name	
			IU		
			IU Hidd		
			Icon		
				ay name	
				order	
			Style		
				l Only	
			Edito	rs	
			Cont	ext Menu	
			Skin		
			Ribb	on	
			OK Ca	ncel	-

You cannot edit the text in the **Text** field because this is a preview. It is edited in the **Content Editor**.

Important

The text displayed in the **Text** field is shown in the form. For example, if you translate the form into German and select the **Display Name** field to be displayed in the form, but this field is empty in German version then the text in the form will be blank.

6.1.4 Localizing Save Action Error Messages

Web Forms for Marketers allows you to translate save actions error messages into any language. For more information about save action error messages, see the *Configuring an Error Message for a Save Action* section.

To localize save actions error messages:

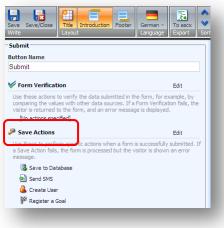
- 1. Open the form in the **Form Designer**.
- 2. In the **Language** group, click the current language to display a list of the language versions that are available.

English -	To ascx	♣ Up♥ Down
	iglish : Eng version.	lish
G	erman : De	utsch
	versions.	
More L	anguages	
-	_	_

- 3. Select the language that you want translate the form to.
- 4. Click the **Submit** button.



5. Click the Save Action link to open the Save Actions dialog box:



6. In the **Save Actions** dialog box, click the **Error Messages** tab and enter the text in the new language for this save action:

Sitecore Webpage Dialo	g	2
Save Actions		
	to perform when a form is submitted. If a Save Action sfully and the visitor is shown an error message.	n fails, the
Actions Error Messages		
If 'Save to Database' fails disp	lay this message:	
Fehlermeldung		~
		v
If 'Tell a Friend' fails display th	is message:	
Fehlermeldung		A
		-
		1
	OK	Cancel

If you do not enter any text, the default save action error message in English is displayed to the visitor.

7. Click **OK** and save the changes.

6.1.5 Localizing Form Verifications Error Messages

The Web Forms for Marketers allows you to translate form verifications error messages into any language. For more information about form verifications error messages, see the *Configuring an Error Message for a Form Verification* section.

To localize form verifications error messages:

1. Open the form in the Form Designer.



2. In the **Language** group, click the current language to display a list of the language versions that are available.



- 3. Select the language that you want translate the form to.
- 4. Click the **Submit** button.
- 5. Click the Form Verification link to open the Form Verification dialog box:

	rman → To ascx nguage
Submit	
Button Name	
Submit	
V Form Verification	Edit
Use these actions to verify the data submitted in the for comparing the values with other data sources. If a Form visitor is returned to the form, and an error message is a	Number Verification fails, the
🚨 Check User and Password	
🚳 User Exists	
Save Actions	

6. In the **Form Verification** dialog box, click the **Error Messages** tab and enter the text in the new language for this save action:

	Form Verification			
-		ou want to use to verif , the visitor is returned		
Action	s Error Messages			
If'Is	User in Role' fails dis	play this message:		
Fer	lermeldung			*
			ОК	Cancel

7. Click **OK** and save the changes.



6.1.6 Localizing the Success Page or Message

Web Forms for Marketers allows you to translate success messages into any language and redirect the visitor to a page in a specific language. For more information about success actions, see the *Success* section.

To localize success pages or messages:

- 1. Open the form in the Form Designer.
- 2. In the **Language** group, click the current language to display a list of the language versions that are available.

English 👻	To ascx	♣ Up♥ Down
En	iglish : Eng	lish
1	version.	
Ge	erman : De	utsch
0\	versions.	
0 More L	anguages	

- 3. Select the language that you want translate the form to.
- 4. Click the **Submit** button.
- 5. Click the **Success** link to open the **Success** dialog box:

Site	core Webpage Dialog	
~	Success	
	Select a page or create a success message to display when the form is successfully submitted.	
•	Success Page	
	🖃 📄 sitecore	
	🖃 🚜 Content	
	🖃 🙆 Home	
	Standard-Items	
	Our-Process	
	Our-Services	
	B 22 Our-Clients	
	Our-Partners	
	Design-Inspiration	
	News-and-Events	•
_		
C	Success Message	
	Thank you for contacting us. One of our	*
	representatives will get in touch with you	
	shortly. Meanwhile, we hope you enjoy your visit.	
		T
	OK Car	

- 6. If you want to use a *success page*, in the **Success** dialog box, select the **Success Page** option and select the item you want to redirect the visitor to. You can select a different page than the one used for the original language version of this form.
- If you want to use a *success message*, in the **Success** dialog box, select the **Success** Message option and enter the translated message text. If no text entered the default success message in English is displayed to the visitor.
- 8. Click **OK** and save the changes.

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