

Web Forms for Marketers 2.1 User Guide

A practical guide to creating and managing Web forms



Table of Contents

Chapter 2 Getting Started 6 2.1 Form Structure 7 2.2 Creating a New Form 10 2.3.1 Copying an Existing Form in the Page Editor 10 2.3.2 Creating a Completely New Form 14 2.4 Form Designer 17 2.4.1 Using the Form Designer 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.5 Form Properties 20 2.4.7 Editing Forms 21 Chapter 3 Field Subit Actions 22 3.1 Field Types 23 3.2 List Field Types 23 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Validations 31 Always Show Captcha 30 3.3.3 Configuring F
2.2 Creating a Form from Scratch
2.3 Creating a New Form. 10 2.3.1 Copying an Existing Form in the Page Editor 10 2.3.2 Creating a Completely New Form. 14 2.4 Form Designer 17 2.4.1 Using the Form Designer Toolbar 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Projecties 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Stelecting Stecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 33 33.3 3.3.3 Configuring Field Error Messages 38 3.4.1 Creating a Custom Validation 38
2.3.1 Copying an Existing Form in the Page Editor 10 2.3.2 Creating a Completely New Form 14 2.4 Form Designer 17 2.4.1 Using the Form Designer Toolbar 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.1 Selecting Sitecore Items 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 Suspicious Visitor is Detected 33 33.3 Suspicious Form Activity Detected 33 33.3 Suspicious Form Activity Detected 38 34.4
2.3.2 Creating a Completely New Form 14 2.4 Form Designer 17 2.4.1 Using the Form Designer Toolbar 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Form Properties 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.1 Selecting Sitecore Items 24 3.2.1 Selecting Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Visitor is Detected 33 3.3.3 Configuring Field Error Messages 38 Chapter 4 Submit Actions
2.4 Form Designer 17 2.4.1 Using the Form Designer Toolbar 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Field S and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Silecore Items 24 3.2.1 Selecting Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.1 Always Show Captcha 30 3.3.3 Configuring Email 36 3.4.1 Creating a Custom Validation 31 Suspicious Form Activity Detected 33 3.3.3 Configuring Tield Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42
2.4.1 Using the Form Designer Toolbar 17 2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configuring Field Error Messages 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Message for a Form Verification 42 4.1.1 Conditions 45 4.2.2
2.4.2 The Form Designer Toolbar 17 2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.1.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 33 Suspicious Visitor is Detected 33 33.3 Soufigure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.2.1 Field Conditions. 45 4.2.2 Default Save Actions<
2.4.3 Form Fields 18 2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Visitor is Detected 33 3.3.3 Configure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.2 Save Actions 48
2.4.4 Field Sections 19 2.4.5 Form Properties 19 2.4.6 Configuring Submit Actions 20 2.4.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configuring Field Error Messages 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.2 Save Actions 45 4.2.1 Field Conditions 45 4.2.1 Field Conditions <td< td=""></td<>
2.4.5 Form Properties. 19 2.4.6 Configuring Submit Actions. 20 2.4.7 Editing Forms. 21 Chapter 3 Fields and Validations 22 3.1 Field Types. 23 3.2 List Field Types. 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names. 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 311 A Suspicious Visitor is Detected 33 3.3.3 Configure a Warning Email 36 3.4 Validations. 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions. 48 Save to Databas
24.6 Configuring Submit Actions 20 24.7 Editing Forms 21 Chapter 3 Fields and Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected. 33 3.3.3 Configure a Warning Email 36 3.4 Validations 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 46 4.2.2 Default Save Actions 46 4.2.1 Fie
2.4.7 Editing Forms 21 Chapter 3 Field sand Validations 22 3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4.4 Validations 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 3.4.3 Configuring an Error Message for a Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 46 4.2.2 Default Save Actions 46 4.2.2 Default Save Actions 48 Save to Database 48 Send SMS
Chapter 3Fields and Validations223.1Field Types233.2List Field Types243.2.1Selecting Sitecore Items243.2.2Manually Entering Names273.3Captcha Field303.3.1Always Show Captcha303.3.2Display Captcha under Specific Conditions31A Suspicious Visitor is Detected31Suspicious Form Activity Detected333.3.3Configure a Warning Email363.4.1Creating a Custom Validation383.4.2Configuring Field Error Messages38Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send Mail48Send Mail48Send Mil50Send Mil50Send MMS50Send MMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
3.1 Field Types 23 3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.2.1 Field Conditions 45 4.2.1 Field Conditions 45 4.2.2 Default Save Actions 46 4.2.2 Default Save Actions 48 Save to Database 48 Send Mail 48 Send MMS 50 Send MMS 50 Send MMS 51 Create User
3.2 List Field Types 24 3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions. 46 4.2.2 Default Save Actions 48 Save to Database 48 Send Mail 48 Send SMS 50 Send MMS 51 Create Item 51 Tereate Item 51 Cre
3.2.1 Selecting Sitecore Items 24 3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions 45 4.2.2 Default Save Actions 48 Send Mail 48 50 Send Mail 48 50 Send MMS 50 50 Send MMS 50 50 Send MMS 50 50 Send MMS 50 50 <t< td=""></t<>
3.2.2 Manually Entering Names 27 3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions 46 4.2.2 Default Save Actions 48 Send Mail 48 50 Send Mail 48 50 Send MMS 50 50 Send MMS 50 50 Send MMS 50 50 Send MMS 50 50 Send MMS 51 53 Create Item
3.3 Captcha Field 30 3.3.1 Always Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4 Validations 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions. 46 4.2.2 Default Save Actions 48 Send Mail 48 Send MMS 50 Send MMS 50 Send MMS 50 Send MMS 51 Create Item 51 Tell a Friend 53 Register a Campaign 53 Create User 54
3.3.1 Álways Show Captcha 30 3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4 Validations 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions. 46 4.2.2 Default Save Actions 48 Save to Database 48 Send Mail 48 Send MMS 50 Send MMS 51 Create Item 51 Treate Item 53 Register a Campaign 53 Create User 54
3.3.2 Display Captcha under Specific Conditions 31 A Suspicious Visitor is Detected 31 Suspicious Form Activity Detected 33 3.3.3 Configure a Warning Email 36 3.4 Validations 38 3.4.1 Creating a Custom Validation 38 3.4.2 Configuring Field Error Messages 38 Chapter 4 Submit Actions 41 4.1 Form Verification 42 4.1.1 Configuring an Error Message for a Form Verification 43 4.2 Save Actions 45 4.2.1 Field Conditions. 46 4.2.2 Default Save Actions 48 Save to Database 48 Send Mail 48 Send MMS 50 Send MMS 51 Create Item 51 Tell a Friend 53 Register a Campaign 53 Create User 54
A Suspicious Visitor is Detected31Suspicious Form Activity Detected333.3.3 Configure a Warning Email363.4 Validations383.4.1 Creating a Custom Validation383.4.2 Configuring Field Error Messages38Chapter 4 Submit Actions414.1 Form Verification424.1.1 Configuring an Error Message for a Form Verification434.2 Save Actions454.2.1 Field Conditions464.2.2 Default Save Actions48Save to Database48Send Mail48Send SMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Suspicious Form Activity Detected.333.3.3 Configure a Warning Email363.4 Validations383.4.1 Creating a Custom Validation383.4.2 Configuring Field Error Messages38Chapter 4 Submit Actions414.1 Form Verification424.1.1 Configuring an Error Message for a Form Verification434.2 Save Actions454.2.1 Field Conditions464.2.2 Default Save Actions48Save to Database48Send Mail48Send MMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
3.3.3Configure a Warning Email363.4Validations383.4.1Creating a Custom Validation383.4.2Configuring Field Error Messages38Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
3.4Validations383.4.1Creating a Custom Validation383.4.2Configuring Field Error Messages38Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
3.4.1Creating a Custom Validation383.4.2Configuring Field Error Messages38Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
3.4.2Configuring Field Error Messages38Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Chapter 4Submit Actions414.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
4.1Form Verification424.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
4.1.1Configuring an Error Message for a Form Verification434.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
4.2Save Actions454.2.1Field Conditions464.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
4.2.1Field Conditions.464.2.2Default Save Actions.48Save to Database.48Send Mail48Send SMS50Send MMS.51Create Item.51Tell a Friend53Register a Campaign53Create User54
4.2.2Default Save Actions48Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Save to Database48Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Send Mail48Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Send SMS50Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Send MMS51Create Item51Tell a Friend53Register a Campaign53Create User54
Create Item
Tell a Friend
Register a Campaign53 Create User
Create User
Edit Role Membership55
Change Password
User Login
User Login with Password59
User Login with Password



4.2.3	Configuring an Error Message for a Save Action	64
4.3 S	uccess	65
Chapter 5	Analytics and Reporting	66
5.1 F	orms and Analytics	67
5.1.1	Enabling Analytics in Forms	67
5.1.2	Associating Goals with Forms	
5.1.3	Configuring Profile Values for Associated Goals	68
5.1.4	Associating a Campaign with Form Submission	
5.1.5	Conversion of Goals	70
5.1.6	Form Dropout Tracking	70
5.2 U	nderstanding Reports	72
5.2.1	Data	72
5.2.2	Summary	72
5.2.3	Form Dropouts Report	73
5.2.4	Form Usability Report	76
Capt	cha Redirection Information	79
5.2.5	Save Failure Report	
5.2.6	The Form Reports Ribbon	81
5.2.7	Reports Statistics	82
5.3 E	vents and Session Trail	83
Chapter 6	Localization	85
6.1 F	orm Localization	86
6.1.1	Localizing Form Fields	
6.1.2	Localizing Field Error Messages	
6.1.3	Localizing List Items	88
Man	ually Entering Names	88
	cting Sitecore Items	
6.1.4	Localizing Save Action Error Messages	
6.1.5	Localizing Form Verifications Error Messages	
6.1.6	Localizing the Success Page or Message	94



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 one example of how a form created using this module would look on a site:

lome	Our Process	Our Services	Our Clients	Our Partners	Design Inspiration	News and Events	About Us	Contact Us
Home >	Contrἐţ Us		b have worldwide now how they car t Us	operations or a sin	igle office, create a Conta /ou.	ct section to p d	lam liber tempo usto odio dignissi resent lupatum zi vant more infor ave a look at our be generation of the second ave a look at our be generation of the second tempo at the second tempo	m qui blandit zril delenit augue giat nulla facilisi. mation?
		ecore <u>Terms of U</u> ur Services Our (rtners Design Ir	nspiration News and E	vents About Us C	ontact Us Con	tact Us O Powered by Sitecor



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
- 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:

	formation for your account	
E-mail		
	Must be a valid e-mail.	
Password		
	Must be at least 6 symbols	
Re-enter password		
- Additional i	nformation	
First 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 e-mail 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	_	Ū. Ū.					_ D _ X
Save Save/Close	Title Intro Footer English Layout Langua		🔶 First 😽 Last	Properties Profiles Analytics	Close Close		
		r value of the selected	Te			- Add a	Required Required Required Required
		_					

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.
- 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.
- 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

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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.



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:

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 and click Edit.
- 2. Open the page that you want to place a form on.
- 3. On the Presentation tab, in the Form group, click Insert:

 ample Layout	Details R	eset Device	Insert
ayout			



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

Create a blank form or copy	and existing one.	
Form Name: Tell a friend		
Create a blank form		
Select a form to copy		
	< Back Next >	Cancel

- 5. Click **Select a form to copy** and click **Next**.
- 6. In the Select a Form window, select the form that you want to copy and click Next.

ect a Form Copy an existing form.			
Global Forms			
🖃 问 Sample forms			
📰 Create an Account			
📰 Get Our Newsletter			
Pay with Credit Card			
🗾 Demo form			
🗾 Leave a message			
Website Forms			
🖃 问 Website			
🛃 Contact Us			
	< Back	Next >	Cancel

7. In the **Select a Placeholder** window, select the placeholder that you want to insert the new form into.

elect a Placeholder The form will be inserted into the placeholder.	
The form will be inserted into the placeholder.	
laceholders:	
content	
< Back Next >	Cancel

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The wizard scans the current layout for available placeholders and filters them according to the *Restrict placeholders* setting. Move the mouse cursor over the placeholder to see the flyover help that contains additional information about the current placeholder (if available).

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

Ch	pose which Analytics options you want to use with this form.
Ena	ble Marketing Analytics
	ect this checkbox to associate a goal with this form. Other analytics functionality is also bled.
Goa	
	Create a new goal Tell a friend Form Completed
	C Select an existing goal
	Select existing goal
S	elect a new or existing goal that is achieved when the form is successfully submitted.
Drop	pout Tracking
	Enable Form Dropout Tracking
C I	elect this checkbox to track all the information entered in this form. You will receive reports ontaining details about potential leads and usability problems. If his is enabled any data entered by visitors is saved in the analytics database, whether e visitor completes the form or not.
	< Back Next > Cancel

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

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.

nfirmation		
Confirm the configuration	n of the new form.	
Form		_
The form will be created	d in:	
 The 'Resources-a The 'content' plac The path: '/siteco friend' 		
Analytics		
Marketing Analytics Associated Goal Form Dropout Tracking	: Tell a friend Form Completed	
Further information		
To configure the goal, o	open the Form Designer and in the Analytics Group click "Profile:	s″.
The form reports are av	vailable in the Form Data Viewer.	
Preview		
		1
Tell a Friend		
Your Name		
Your Name Your e-mail		
Your e-mail		
Your e-mail Friend's e-mail		
Your e-mail Friend's e-mail		
Your e-mail Friend's e-mail Message	x Vith My Friend	
Your e-mail Friend's e-mail Message	//ith My Friend	
Your e-mail Friend's e-mail Message	//th My Friend	el

The **Confirmation** window displays the summary of the choices you made with a preview of the form.

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

Tell a friend - Fo	rm Designer			
	Title Intro Footer Layout Cayout Cay	🔶 Firs n 😻 Last		
Appearance		1		
Default Value:		_		
Rows:	4	Т	ell a friend	
Help:				
			Title Your Name	Type Required
	•		Title	Type Required
Css Class:	scfMultipleLineTextBorder		Your e-mail	E-mail
Validation		1	Tide	Type Required
Validation:	No Validation		Friend's e-mail	E-mail
Regular Expression:			Title	Type Required
Minimum Length:	0		Message	Multiple-Line Text 💌 🔽 💥
Maximum Length:	512	1	🚱 Add Field	
Analytics	1	9	Add Section	
Tag:			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.	-	Yes, Share with My Friend	
		_		



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 and click Edit.
- 2. Open the page that you want to place a form on.
- 3. On the Presentation tab, in the Form group, click Insert:



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

n existing one.	
< Back Next >	Cancel

5. Click Create a blank form and click Next.



6. In the **Select a Placeholder** window, select the placeholder that you want to insert the new form into.

elect a Placeholder The form will be inserted into the	e placeholder.			
aceholders:				
content-bottom-row				
content-top-row				
	< Back	Next >	Can	cel

The wizard scans the current layout for available placeholders and filters them according to the *Restrict placeholders* setting. Move the mouse cursor over the placeholder to see the flyover help that contains additional information about the current placeholder (if available).

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

ch Analytics options you w eting Analytics heckbox to associate a go			nality is also
e a new goal	with this form. Oth	er analytics functio	nality is also
e a new goal	with this form. Oth	er analytics functio	nality is also
Cite cited			
friend Form Completed			
t an existing goal			
ct existing goal			~
ew or existing goal that is	chieved when the fo	orm is successfully	submitted.
-king			
e Form Dropout Tracking			
	formation ontered in	this form You wil	receive reports
details about potential lea nabled any data entered b	ds and usability prob visitors is saved in	lems.	
	< Back	Next >	Cancel
	lect existing goal new or existing goal that is a acking ble Form Dropout Tracking is checkbox to track all the in g details about potential leas enabled any data entered by	lect existing goal new or existing goal that is achieved when the for adding ble Form Dropout Tradking is checkbox to track all the information entered ir gotetalis about potential leads and usability prob	lect existing goal new or existing goal that is achieved when the form is successfully ; adding ble Form Dropout Tracking is checkbox to track all the information entered in this form. You will g details about potential leads and usability problems. enabled any data entered by visitors is saved in the analytics datat

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

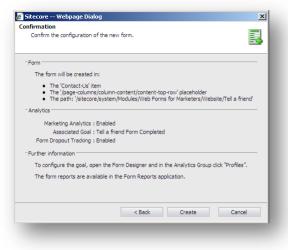
8. Select the **Enable Form Dropout Tracking** to track all the information entered in this form. When this is enabled all the data entered in this form is saved in the analytics database, whether the visitor completes the form or not.

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

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9. Click Next and the Confirmation window appears.



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

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

	Up Rinst Down W Last Analytics Close Analytics Close
This form does not contain any fields.	Tell a friend
	Add a field
	Submit



2.4 Form Designer

Use the Form Designer to design and edit forms.

			Tell a friend	
oleLineTextBorder	×			ype
			TitleT	ype Required E-mail Required
	×		Friend's e-mail E	ype Required E-mail ype Required Multiple-Line Text
			🗘 Add Field	
			Yes, Share With My Friend	
		pleLineTextBorder	pleLineTextBorder	pleLineTextBorder ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ▼ Iation ■

2.4.1 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.

2.4.2 The Form Designer Toolbar

You can perform the following actions in the Form Designer:

- 1. 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**.

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- 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.

2.4.3 Form Fields

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

Title Your name	Type Single-Line Text		Required	×
ч.	, •	_		

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.



2.4.4 Field Sections

Field sections are used to group fields.

Image: State of the state o
Save Save/Close Title Introduction Footer Engine Court Footer Language Export Softing Analytics Switch to Close Close Switch to Close Close Close Switch to 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.
Trile Invitation
Tide Type Required Your Name Sigle-Line Text ▼ □
Tole Type Required Your e-mail E-mail V
Tde Type Required Friend's e-mail E-mail ▼ I
Tole Type Required Message Multiple-Line Text V
C Add Field Add Section
Tide Tell us more who you are
Tole Type Required Country Drop List T
O 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.

2.4.5 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:	×
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.

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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*.

2.4.6 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		Tell a friend
🎸 Form Verification	Edit	
Use these actions to verify the data submitte comparing the values with other data sources visitor is returned to the form, and an error m [No actions specified]	. If a Form Verification fails, the	The text you enter here is displayed directly below the form name. This coul be, for example, a description, some instructions, or any other information.
		Tide
Save Actions	Edit	Invitation
Use these to perform specific actions when a a Save Action fails, the form is processed but message.		Tide Type Required Single-Line Text
🗟 Save to Database		Title Type Required
Tell a Friend		Your e-mail E-mail 🔽
🏴 Register a Goal		Title Type Required
Success	Edit	Friend's e-mail 🗾 🔽
When a form is successfully submitted, you ca success message.	an display a specific page or a	Title Type Required Multiple-Line Text V
Success Page: [none]		
Success Message: Thanks for telling a frie our 'Tell a Friend' form.	end! We appreciate you using	🚱 Add Field
	J	Yes, Share With My Friend

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.

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• 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.

2.4.7 Editing Forms

To edit an existing form in the Page Editor, click the Edit button:

ell a friend			
- Invitation			
Your Name			
Your e-mail			*
Friend's e-mail			*
Message		▲ ▼	*
Yes, Share With I Edit	My Friend		



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**.



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 <u>Web Forms for Marketers Reference</u>.

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 ent	ering names			•
			Display value	s as text on th	e form
乌 Value		Text		English	
Pricing		Pricing inform	ation	•	
Brochure				G	
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:

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

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

List Items:	0 items		
Selected Value:			Contact Us
			Title
Appearance			Name
Direction:	Vertical		Tide E-mail
Columns:	1	L	1
Help:	×		Title Contact me about
			🚱 Add Field
Css Class:	scfCheckBoxListBorder	:	Add Section
Analytics		:	Outwitt
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:

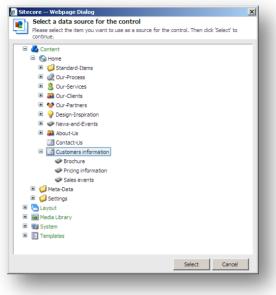
t items by	Selecting Sitecore item	S		
elected Root Item	/sitecore			Browse
alue:	[Item Name] 🗾	Text	1	[Item Name] 🗾
ontent		content		
iyout		layout		
nedia library		media library		
ystem		system		
emplates		templates		

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

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



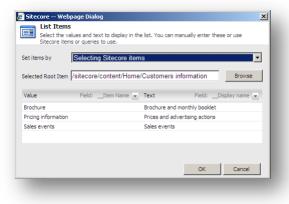
6. In the List Items dialog box, you can see that the sub-items are now listed.

et items by	Selecting	g Sitecore item	s		•
elected Root Item	/sitecore/	content/Home/	Customers info	rmation	Browse
alue	Field:	_Item Name	Text	Field:	Item Name 💌
rochure			Brochure		
ricing information			Pricing information	n	
iales events			Sales events		

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 🗟 button in the **Text** or **Value** column and select the field:



- 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		*
-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	Type E-mail	•	Required	
Title Contact me about	Type Checkbox List	•	Required	2
Add Field Add Section				

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

Items: Selected Value:	0 items	Contact Us
Appearance		Name
Direction:	Vertical	Title
Columns:	1	E-mail
Help:	A	Contact me about
	V	🚱 Add Field
Css Class:	scfCheckBoxListBorder	Add Section
Analytics		Submit
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 *Manually Entering Names* option:

List Items	
Select the values and text to Sitecore items or queries to	o display in the list. You can manually enter these or use use.
Set items by Manually er	itering names
	Display a different text on the form
Value	
Enter the value of the list iten	ו 🗘 😮
	OK 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:

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Sitecore items or quer	es to use.		
Set items by Manua	lly entering names		
	Displa	ay values as tex	t on the for
실 Value	Text	Engl	ish
Pricing	Pricing information		C) 🖸
Brochure			6
Sales	Sales events		00
			-

If you have already entered the **Value** field values, you must click the **Value** State 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.

The form should look something like this:

lame		*
-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 🦹	
	x 0 , 0 §	

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 ascx Export	♣ Up♦ DownSorting	🔶 First 🛛 😻 Last	Properties Analytics	© Profiles	For Swi
Security	_							
Always show CAP	тсна				Creat	te Aco	coun	t
the visitor is a	a robot		Edit		If you :	already ha	ive an ac	coui
Appearance				=				_ 1
Font Warping:	None		•		Title			_
Background Noise:	None		•		Required	l informatio	n	_
Line Noise:	None		-		Title E-r	nail		
Help:			*		Title	ssword-Cor	firmation	_
			-			55W010-C01	inimation	
Css Class:	scfCaptcha		•		Title Ent	ter the sym	bols you	see
					0	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.

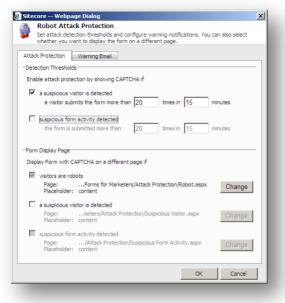
	Title Introduction Footer Layout	English - Language	To ascx	▶ Up ✔ Down orting	♠ First ¥ Last	Properties Analytics	Profiles For Sw
Security				1			
Attack Protection:							
	тена				Creat	te Acc	count
Show CAPTCHA if	:		Edit				
💓 the visitor is	a robot						
•					If you a	already ha	ve an accou
Appearance				1			
Font Warping:	None		-		Title	l information	
						rimonnatior	
Background Noise:	None		-				
Background Noise: Line Noise:			<u> </u>		Title	nail	
Line Noise:	None None					nail	
					Title E-n Title		
Line Noise:					Title E-n Title	nail ssword-Con	firmation
Line Noise: Help:			× 4		Title E-n Title Pa: Title	ssword-Con	
Line Noise:					Title E-n Title Pa: Title	ssword-Con	firmation bols you see

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:

Save Save/Close	Title Introduction Footer Language To ascx Language	 ▲ Up First ✓ Down Last Sorting ▲ Down Last Analytics
Security		
Attack Protection:		
C Always show CAF	тсна	Create Account
Show CAPTCHA it	Edit	
💙 the visitor is 💜 a visitor subr	a robot mits the form more than 20 times in 15 minutes	If you already have an acco
Appearance		Title
Font Warping:	None	Required information
Background Noise:	None	Title E-mail
Line Noise:	None	
		Title Password-Confirmation
Help:		Title
Help:		
Help:	V	Enter the symbols you se

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

	Set attack detection thresholds and configure warning notifications. You can also select whether you want to display the form on a different page.
Attac	k Protection Warning Email
Dete	ction Thresholds
Enal	ole attack protection by showing CAPTCHA if
•	a suspicious visitor is detected a visitor submits the form more than 20 times in 15 minutes
	suspicious form activity detected the form is submitted more than 20 times in 15 minutes
_	
	Display Page
1	lay Form with CAPTCHA on a different page if
V	Visitors are robots Page:Forms for Marketers/Attack Protection/Robot.aspx Change Change
v	a suspicious visitor is detected
	Page:keters/Attack Protection/Suspicious Visitor.aspx Placeholder: content Change
	suspicious form activity detected Page:/Attack Protection/Suspicious Form Activity.aspx 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.
 - 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.

Save Save/Close Image Introduction Footer English To ascx Up To ascx Image Introduction Footer Security Attack Protection: Image Introduction Footer Image Introduction Footer Footer Attack Protection: Attack Protection: Image Introduction Footer Edit Show CAPTCHA if Edit If you already have an account Appearance Image Information To asswer Information Protection: Image Information To asswer Information Ine Noise: None Image Information Ine Noise: None Image Information Ine Noise: SchCaptcha Image Information Tele Image Information Image Information Tele Image Information Image Information Css Class: schCaptcha Image Information Information Image Information Image Information	Create Account - Form Designer								
Attack Protection: C Alwaye about CASTCHA Show CAPTCHA If the visitor is a robot CAppearance Font Warping: Background Noise: Ine Noise: None Line Noise: None Line Noise: None Css Class: scfCaptcha ScfCaptcha School Captcha School Captcha	Save Save/Close	Title Introduction Footer		To ascx	V Dowr		Properties	Profiles	
Carbon CAPTCHA Show CAPTCHA If the visitor is a robot CAppearance Font Warping: None Background Noise: None Line Noise: None Line Noise: None Case Class: scfCaptcha Case Class: scfCaptcha									٦
Show CAPTCHA if Edit If you already have an account If you already have an account Appearance If you already have an account Font Warping: None Background Noise: None Line Noise: None Help: If you already have an account Tride Email Tride Password-Confirmation Css Class: scfCaptcha						^			
Image: Second	· · · · · · · · · · · · · · · · · · ·					Crea	te Aco	count	
Appearance If you already have an accou Font Warning: None Background Noise: None Line Noise: None Help: If you already have an accou Case Class: scfCaptcha		J		Edit					
Font Warping: None Table Background Noise: None Image: Constraint of the symbol	🦅 the visitor is	a robot				If you a	already ha	ve an aco	cou
Background Noise: None Required information Tole E-mail Help: Css Class: scfCaptcha	Appearance								- 1
Background Noise: None Tree Line Noise: None E-mail Help: Fassword-Confirmation Cas Class: scfCaptcha Fassword-Confirmation	Font Warping:	None		•					_
Line Noise: None E-mail Help: E-mail Case Class: scfCaptcha E-mail Tale Password-Confirmation Tale Enter the symbols you see	Background Noise:	None		•		Required	l informatio	ı	-1
Help: Css Class: Css Class: ScfCaptcha L'inali L'inali Password-Confirmation Trele Enter the symbols you see	Line Noise:	-					a a il		_
Css Class: ScfCaptcha	Mala.	Trone				· · ·	nan		
Css Class: scfCaptcha	Help:							-	_
Css Class: scfCaptcha Enter the symbols you see				_		[Pa:	ssword-Cor	Inmation	
	0 Cl								
O Add Field	USS Class:	scfCaptcha		•		JEnt	ter the sym	pois you s	see
						G) /	Add Field		

- 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.

	:k Protection ction thresholds and configure warning notifications. You	ran also select
	ant to display the form on a different page.	
ttack Protection	Warning Email	
Detection Threshold		
	-	
Enable attack prote	ction by showing CAPTCHA if	
a suspicious vi	sitor is detected	
a visitor subi	mits the form more than 20 times in 15	minutes
suspicious form		
the form is s	ubmitted more than 20 times in 15	minutes
Form Display Page -		
	APTCHA on a different page if	
Display Form with C		
	pots	Change
Display Form with C	nots Forms for Marketers/Attack Protection/Robot.aspx	Change
Display Form with C	nots Forms for Marketers/Attack Protection/Robot.aspx content	Change
Display Form with C visitors are rob Page: Placeholder: a suspicious vis Page:	nots Forms for Marketers/Attack Protection/Robot.aspx content sitor is detected keters/Attack Protection/Suspicious Visitor.aspx	
Display Form with C visitors are rob Page: Placeholder: a suspicious visit	nots Forms for Marketers/Attack Protection/Robot.aspx content sitor is detected keters/Attack Protection/Suspicious Visitor.aspx	Change Change
Display Form with C visitors are rob Page: Placeholder: a suspicious vis Page:	Nots Forms for Marketers/Attack Protection/Robot.aspx content aitor is detected keters/Attack Protection/Suspicious Visitor.aspx content	
Display Form with C visitors are rob Page: Placeholder: Page: Placeholder: Placeholder: Suspicious form Page:	NotsForms for Marketers/Attack Protection/Robot.aspx content stor is detectedketers/Attack Protection/Suspicious Visitor.aspx content activity detected/Attack Protection/Suspicious Form Activity.aspx	Change
Display Form with C visitors are rob Page: Placeholder: a suspicious vis Page: Placeholder: C suspicious form	NotsForms for Marketers/Attack Protection/Robot.aspx content stor is detectedketers/Attack Protection/Suspicious Visitor.aspx content activity detected/Attack Protection/Suspicious Form Activity.aspx	
 visitors are rob Page: Placeholder: a suspicious viti Page: Placeholder: suspicious form Page: 	NotsForms for Marketers/Attack Protection/Robot.aspx content stor is detectedketers/Attack Protection/Suspicious Visitor.aspx content activity detected/Attack Protection/Suspicious Form Activity.aspx	Change

- 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.

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

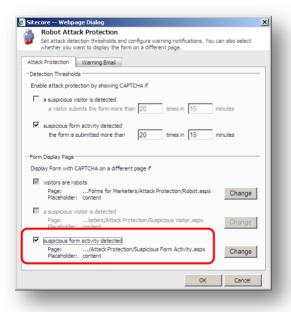
Save Save/Close	Title Introduction Footer Layout		TO GOOK	▲ Up✓ DownSorting	-	Properties Profiles Analytics	
Security				7			
Attack Protection:							
C Always show CAR	тсна				Creat	e Accour	۱t
Show CAPTCHA i	f		Edit				
the visitor isthe form is s	a robot ubmitted more than 20 times in	15 minutes			If you al	ready have an a	асс
Appearance					Title		
Font Warping:	None		-		Required i	nformation	
Background Noise:	None		•		Title E-ma	ail	_
Line Noise:	None		-		Title		
Help:			-			word-Confirmatio	n
			•		Title Ente	r the symbols yo	u si
	1						

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.



3. To display the form with the Captcha field on your custom page:

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- o Click Change
- Browse to the page you want to display the form with the Captcha field on
- 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:

Save Save/Close	- Form Designer	English - Language	To ascx	▲ Up✓ DowrSorting	🔶 First n 😻 Last	Properties Analytics	Profiles For Sw
Security							
Attack Protection:					_		
C Always show CAP					Crea	te Aco	count
Show CAPTCHA II	f		Edit				
쓋 the visitor is	a robot				If you	already ha	ve an accou
Appearance				-			
Font Warping:	None		-		Title		
Background Noise:	None		-		Required	l informatio	ו
-	-				Title		
Line Noise:	None		-		E-r	nail	
Help:			*		Title		
						ssword-Cor	firmation
			-	1.			
Css Class:	, La eff) e e t e t e				Title	or the own	bols you see
033 010331	scfCaptcha				JC11	er me sym	bois you see
					6	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

	2 Webpage Dialog
Set	attack detection thresholds and configure warning notifications. You can also select ether you want to display the form on a different page.
ttack Pr	otection Warning Email
f visitor	s are robots or any of the thresholds are exceeded send a warning email
Fo:	admin@mysite.com
cc:	webmaster@mysite.com
Subject:	Robot Attack
Message	Body:
	oot attack is detected. A characteristic for the details.

- 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	
ingener erip ererer	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	Type Single-Line Text	•	Required	- 1
Title E-mail	Type E-mail	•	Required	- 1
Title ZIP Code	Single-Line Text	•	Required	*
⊤ide Contact me about	Type Checkbox List	•	Required	
Add Field Add Section				

2. In the **Validation** section, in the **Validation** field, select *Numbers only*. The **Regular Expression** field is filled in automatically.

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

3. In the **Maximum Length** field, enter 5.



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

Default Value:		
Help:	A	Contact Us
	T	Title
Css Class:	scfSingleLineTextBorder	Name
Validation	·····	Title
Validation:	Numbers only	E-mail
Desider Francisco		Title
Regular Expression:	^[-,+]{0,1}\d*\.{0,1}\d+\$	ZIP Code
Error Message:	ZIP Code must contain digits. 🔺	Title
		Contact me about
	Y	🔂 Add Field
Minimum Length:	0	Add Section
Maximum Length:	5	Add Section
		Contact us
Analytics	_	
Tag:		:
	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:

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

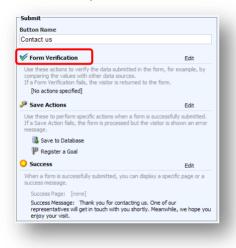


4.1 Form Verification

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.



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

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.

		er and Password				
<u> </u>	Verify that t	he username and password e	ntered in a form ma	tches a Sitecore u	iser.	
	User Name:	E-mail address			•	•
Use	r 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.

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• The user is a member of the role.

Verification	her a user is in a se will fail.	elected role. You ca	in select the s	cenario in v	which the For	m
User Name: 🍸	ourname				–	
	tranet					
Role:					Edit	
The form verifica	ation will fail if:	• The user C The user	is not in the ro	ole.		
		 The user 	s in the role.			
				OK	Cance	

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.

User Exists	the user is a Sitecore user.		
-			
User Name: E-ma	il address		
Domain: extrar	net	•	*
The form verification	will fail if: • The user does no C The user already		
		OK 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.

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

Site	form verific	ification nethod you	want to us			on when the form and an error mes	n is submitted. If sage is
	displayed.						
Actio	ns Error M	essages					
	lser Exists' fa						
Th	is usern	name is	alread	y taken	. Try ar	nother one	
							Ŧ
						QK	Cancel
						OK	Cancel

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

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4.2 Save Actions

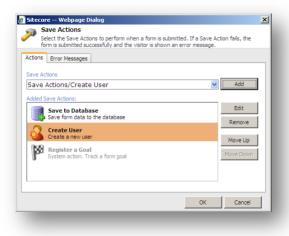
The Web Forms for Marketers module allows you to assign actions to the form that will be performed when all form verifications are successfully completed and the visitor clicks the **Submit** button. These are called save actions and are very similar to form verifications, but will not return the visitor 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	rm Designer	
	Title Intro Footer Layout Cayout Cay	n ≫ Last Profiles Anslytos
Appearance		1
Default Value:		
Rows:	4	Tell a friend
Help:	Ă	Tole Type Required Single-Line Text 🔽
Css Class:	scfMultipleLineTextBorder	Title Type Required Your e-mail E-mail
Validation		Title Type Required
Validation:	No Validation	Friend's e-mail E-mail 🔽 🗹
Regular Expression:		Title Type Required
Minimum Length:	0	Message Multiple-Line Text 🔽 🔽 💥
Maximum Length:	512	C Add Field
Analytics		Add Section
Tag:		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.	

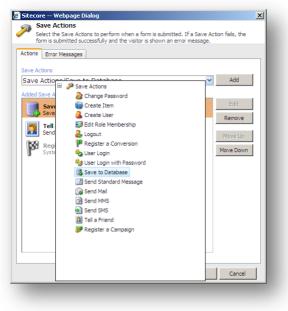
2. In the left-hand part of the window, click the **Save Actions** link to open the **Save Actions** dialog box:



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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 mor	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	@sms.example.com
From Number	· · · · · · · · · · · · · · · · · · ·
end Message	Always
1essage Body 👻	✓ Always
iessage body v	Subscribe to a monthly newsletter
	When Subscribe to a monthly newsletter is selected
	$\overline{\mathbf{M}}$ 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
	Ĩ
	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:

Sitecore \	/ebpage Dialog			×
💫 Send S	MS			
message	elect the form field you wa you want to send. You c alue of a form field.			
	Telephone Number	SMS G	ateway	
Recipient		▼ @sm	s.example.com	
From Number				
Send Message	When Subscribe to a mo	nthly newsletter is selec	ted, When Sales eve	ents is sele 🔽
Message Body 🚽	Always			<u> </u>
	Subscribe to a mon	thly newsletter		
	When Subscribe	to a monthly newsletter i	is selected	
	When Subscribe	to a monthly newsletter i	is not selected	
	Contact me about			
	U When Brochure is	selected		
	U When Brochure is	s not selected		
	🗌 When Pricing info	rmation is selected		
	🗌 When Pricing info	rmation is not selected		_
	When Sales even	its is selected		-
				-
			OK	Cancel

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.

The item for this action contains the following fields:

Field	Description
То	The addresses of the direct recipients of this e-mail message.

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Field	Description
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.

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 Sitecore	Webpage Dialog	×
<u> </u>	nd Email Editor	
Con Con	figure the template of your mail.	_
To 👻	[E-mail]	
CC 👻	info@nicam.net	
BCC		
Subject 👻	Nicam.net registration	
Insert Field	• 🙏 🐚 📇 🎲 🧊 📬 📇 🤊 • 🗠 • 😒 🕞	
B I	<u>u</u> A - 🔅 -	
Dear [Nai		
	been successfully registered at www.nicam.net	
	se your [E-mail] email address as a user name to log in to our site.	
If this is r it.	ot 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.

message		ant to use for the recipient of can also select whether you w		
	Telephone Number	SMS Gatew	ay	
Recipient	Mobile phone numb	oer 💌 @sms.e	xample.com	
From Number	+91 902 049 9777			
Send Message	Always			~
Messace Bodw. Dear [N informa	Name E-mail Mobile phone number ZIP Code	pr contacting us! to your [E-mail]		4
			OK Cancel	

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.
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.

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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.

	e of a form field. Telephone Number MMS Gateway Mobile phone number MMS Gateway	
From Number	+91 902 049 9777	-
Send Message	Always	~
Insert Field	· X · La 🛍 🖏 🦓 🎁 📇 🕫 · M · 🗠 - 🛞 属	
Dear [Name]. T your [E-mail] e	hank you for contacting us! Additional information will be sent to mail address.	

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.

elect template Select a template	and a destination for the items	۲
Template: Destination:	Sample/Sample Item /sitecore	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.

ttings		
Show Standard Fields		
Mapping		
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	•
Phone number	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.

*
·

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.

Sitecore Webpage	Dialog	×
Select fields Set fields where ac	tion takes parameters.	
From	E-mail	~
То	My friend's email	-
Mail	Write a message for your friend	-
	ОК С	ancel

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*.

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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.

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



The **User Name** field is a required field that is used to uniquely identify the user. You must select an email 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 "<u>example@domain.com</u>" 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.

Create User				
	ld values which will b			
If the user already	exists, the user's ir	nformation will be u	updated.	
Basic User Infomation	Additional User P	roperties		
	-			
-Create or update use	er Profile			
Overwrite user field	ald if it already cont	aine a value		
Overwrite user in	autilitiaireauy conta	airis a value		
Form Field		User Profile		
Name	-	Full Name		- 🗶
	_			
👒 Add Fields				
Audit				
Save Audit Informati	on to: Don't Sav	e		-
			OK	Cancel

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.

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**, 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	<u> </u>
Associate existing user wi	th this visitor	
Role Membership		
Change Role Membership:	Always	6
Add User to Role:		u.
	J	
		Edit
Remove User from Role:		
	,	Edit
Audit	-	
Save Audit Information to:	Don't Save	

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.

Sitecore Webpage Dialog	<u>×</u>
Edit User Roles	
Change the roles that the user is a member of.	
elected Roles:	
elected Roles:	
Add Remove	
Available Roles:	
Drag a column to this area to group by it. Search:	
Role	I
sitecore \Analytics Content Profiling	
sitecore Analytics Content Profiling sitecore Analytics Maintaining	
sitecore \Analytics Reporting sitecore \Author	
sitecore\Designer sitecore\Developer	
sitecore \Sitecore Client Account Managing sitecore \Sitecore Client Authoring	
sitecore \Sitecore Client Configuring	
sitecore \Sitecore Client Designing sitecore \Sitecore Client Developing	
sitecore Sitecore Client Developing sitecore Sitecore Client Forms Author	
sitecore Sitecore Client Forms Author sitecore Sitecore Client Maintaining	
sitecore \Sitecore Client Publishing	
sitecore \Sitecore Client Securing	
	Page 1 of 2 (21 items)
	K 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.

🂋 Change the	password of a user.		
User Name:	E-mail		•
Old Password:	Password		•
New Password:	Password		-
Domain:	extranet		*
		ок	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.



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.

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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	bpage Dialog 🔰 🔰
	in with Password
Log a user i password is	in based on the information entered in the form. The user is only logged in if the s valid. This action works only for existing users.
— Identify the Us	ser
User Name:	E-mail 💌 *
User Password:	Current Password
Domain:	extranet 💌 *
V	Associate existing user with this visitor
Audit	
Save Audit Infor	rmation to: Don't Save
	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.

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.



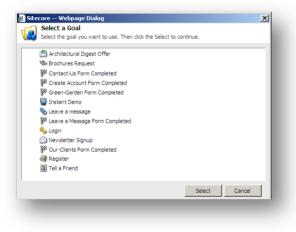
Register Conversion

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.



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>.

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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:
 - o 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.
 - 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.

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

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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:
 - In the Standard Message field browse to the standard message of the needed target audience.

essage & Recipi Select the stand the message to	dard message that you w	ant to send and the user that you v	want to send
are message to			_
Message			
Standard Message	Subscription Confi	rmation	Browse
Wait for the s	end confirmation receipt		
Recipient			
Send the message	to		
C Email address	of the current visitor		
• Email address	of an existing user		
The user name	e is based on information	entered in form fields:	
User Name:	Name		*
Domain:	sitecore		•
	,		
			_
		< Back Next >	Cancel

 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.

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- 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.
- On **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.

rsonalize Message		
	e with information stored in form fields. You c token_name\$ in the standard message and iew the message by clicking 'Next'.	an 🔣
Gelect a form field whose values will be displa	yed in place of the token.	
link 🔻		
argetaudience 👻 [Subscribe me to]		
visitor 👻 [Name]		
	< Back Next > C	ancel

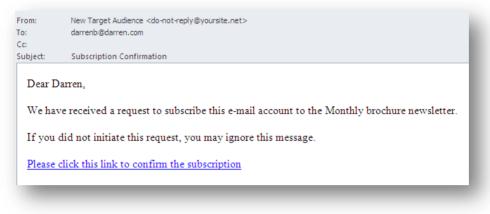
• Preview the message and click **Finish**.

eview Message		
	nce of the message you have selected and mod re result and 'Back' if you wish to change the me	
irom: New Target Audience <do-no ubject:: Subscription Confirmation</do-no 	ot-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 reque	est, you may ignore this message.	- I
Please click this link to confirm	the subscription	
	< Back Finish	Cancel

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When the visitor submits the form, they receive the following notification on the specified e-mail address:



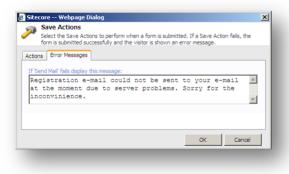
4.2.3 Configuring an Error Message for a Save Action

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.



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, fo comparing the values with other data sources. If a Form Verification fails, the visitor is returned to the form.	example, by
[No actions specified]	
Save Actions	Edit
Use these to perform specific actions when a form is successfi If a Save Action fails, the form is processed but the visitor is s	
message.	
message.	
message.	Edit
message. Save to Database Pagister a Goal	Edit
message.	Edit

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 submitted.	n the form is successfully	
Success Page		
sitecore		
istecore Gontent		
Standard-Items		
Q Our-Process		
Our-Clients		
🗉 😏 Our-Partners		
🗉 🍚 Design-Inspiration		
News-and-Events		-
O Success Message		
Thank you for filling in the form.		
		-
	ок Са	ancel

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:



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**.





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

		ibe the content on this page interests as they navigate the	
Focus:			
Background:	_		
-	\bigcirc		
Practical:	4		
Practical:			
1			
Process:			
	3		
Scope:	_		
	0		
	4		
Function:			
Building Trust:			
•			
Call to Action:			
Car to Action.			
		ОК	Cancel

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.

👿 Tell a Friend - Fori	🖉 Sitecore Webpage Dialog 🛛 🗶	I
Save Save/Close T Write La	Save Actions Select the Save Actions to perform when a form is submitted. If a Save Action fals, the form is submitted successfully and the visitor is shown an error message.	
Submit		
Button Name	Save Actions	
Yes, Share With My	Save Actions/Register a Campaign 🛛 🗸 Add	
Form Verification	Added Save Actions: Save to Database Edit Edit	Туре
comparing the values	Remove	Sing
If a Form Verification f [No actions specifie	Tell a Friend	Type E-ma
isave Actions 🥟	Register a Campaign Move Down	Туре
Use these to perform : If a Save Action fails, message.	Register a Goal System action. Track a form goal	E-m
Save to Databa	Sitecore Webpage Dialog	×
Tell a Friend Pregister a Goal	Select Campaign Select Campaign Event to associate with this form.	
Success	Select Campaign Event:	
When a form is succes success message. Success Page: [no	B Architectural Digest	
Success Message: our 'Tell a Friend' fo		
	OK	Cancel

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.

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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:

Choose which Analytics options	ou want to use with this f	orm.	~
Enable Marketing Analytics			
Select this checkbox to associate enabled.	a goal with this form. Oth	er analytics functiona	lity is also
Goal			
 Create a new goal Tell a friend Form Complet 	ed		
C Select an existing goal			
Select existing goal			~
Select a new or existing goal th	at is achieved when the f	orm is successfully su	bmitted.
Dropout Tracking	}		
Enable Form Dropout Trad	ing		
Select this checkbox to track a	-	n this form. You will n	eceive reports
containing details about potent If this is enabled any data enter the visitor completes the form	ial leads and usability prol red by visitors is saved in	olems.	
	< Back	Next >	Cancel

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, in the Sitecore desktop click **Sitecore**, **All Applications**, **Web Forms for Marketers**, **Form Reports** and select the form for which you want to view reports. You can run *Form Reports* in the **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		Jsability Report Save Failure		Switch to
Drag a column to this		Sability Report Saver allore	Report	Search:
Created	Name	Email	Phone Number	You want to request
15.10.2009 16:04:4:	L 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	B 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	L Steven Perry	sp@perry.com		Being contacted by a sales representative, Pricing information
15.10.2009 17:10:03	8 Korry Peanch	kp@startlab.com		Being contacted by a sales representative
15.10.2009 17:23:46	6 Korry Peanch	kp@startlab.com		Being contacted by a sales representative
15.10.2009 17:26:11	L 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 19	ccount Switch to			
ata Summary Dro	opout Report Usability Report Save Failure Report			
<u>~</u>	Contact Us Detailed summary:			
	Field Name	Responses	Total number	Reset All
	SName ─── Form Field	11	Total number	Reset
	🕞 Email	11	of field records	Reset
	Phone Number	11		Reset
Values	You want to request	16		Reset
entered by	Brochures	4	25%	
entered by	Being contacted by a sales representative	7	43,75%	
users	Pricing information	5	31,25%	

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:

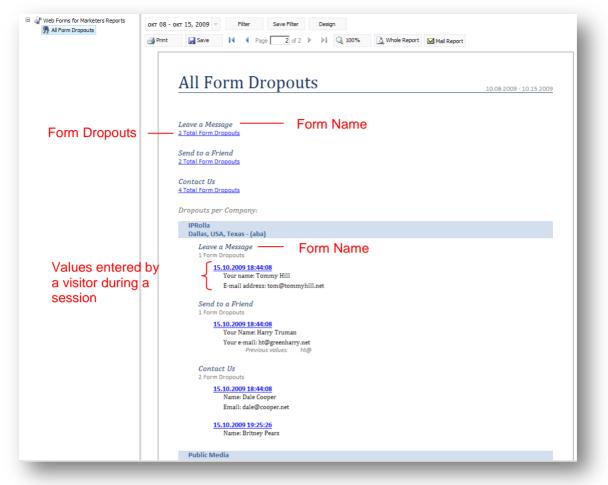
Form Reports Contact Us Create an Account Open for	Designer Switch to
Data Summary Dropout Report	Usability Report Save Failure Report
окт 09 - окт 16, 2009 🔻 Filter	Save Filter Design
📑 Print 📑 Save 🗐 🖣	Page 1 of 1 🕨 🕅 Q 100%
Visitor's information company, city,	S Total Form Dropouts IPRolla Dallas, USA, Texas - (aba)
country, region, IP address and ISP	15.10.2009 19:25:26 Name: Britney Pears Time of visit
name	Public Media
	Chicago, USA, Chicago - (pm)
	15.10.2009 19:50:23 Name: Patrick Link to the detailed information on this Sonik user's session Copenhagen, Denmark, Copenhagen - (dot) Link to the detailed
Field name and entered value	16.10.2009 8:47:00 Name: Victor S. Sanchez Previous values: Victor Sanchez.com Phone Number: +1-754-654-447 Previous values: +(1-654-654-447)

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.

t	🛃 Save	↓ Page 2 of 2 ▷ ▷ □ Q 100% Whole Report Mail Report	
	Session	1	
	Name: Country: City: Region: ISP:	Sonik Denmark Copenhagen Copenhagen dot	<u>Classify</u> <u>Subscribe</u> <u>CRM</u>
	Referrer:	(direct)	
	Date/time: Visit no.: Page Count: Duration:	2009-10-16 08:47:00 <u>33</u> 5 02:10:23	
		00:00:00 / <u>Default.aspx</u>	
		01:33:21 /en/Contact-Us.aspx [Contact Us] Email: vs@sanchez.com [Event: Field Completed] [Contact Us] Name: Victor Sanchez [Event: Field Completed] [Contact Us] Name: Victor S. Sanchez [Event: Field Completed] [Contact Us] Phone Number: +1-754-654-447] [Event: Field Completed] [Contact Us] Phone Number: +1-754-654-447] [Event: Field Completed]	
		01:35:05 /en/Our-Process.aspx	

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 Contact Us Create an Account Open © Data Summary Dropout Report Usa	Designer Switch to bility Report Save Failure Report
окт 09 - окт 16, 2009 🔻 Filter	Save Filter Design
📑 Print 📑 Save 🚺 🖣 Page	e 2 of 2 🕨 🕅 🔾 100% 🗋 Whole Report 🖂 Mail Report
	Form Usability Report 10.09.2009 - 10.16.2009
	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
	Errors in Dropouts: 1 Invalid Field Syntax
	Last Error Before Dropout. 1 Invalid Field Syntax
	Overview 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.
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*.

And Southard Detail Verbold Or 12 - ort 19, 2009 Iffer Pint Save III Pint Save IIII Detailed Usability Report 1012-2009-10.19.2009 Detailed Usability South South Corr Value IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Form Reports Contact Us Create an Account Designer Designer	
Outr 12 - outr 19, 2009 Filter Save Filter Design Image: Ima	View Open F3 Switch to	_
Print Sive I Page I		
Detailed Usability Report 10.12.2009 - 10.19.2009 Form Usability 0.012.2009 - 10.19.2009 Sonik Ogenshagen, Denmark, Copenhagen - (dot) Classify / Subscribe / CMM Ontact Us Contact Us Selected form 10.2009 10.41:29 Previous page Pervious Page: /en/Our-Process.aspx Form page Form Page: /en/Our-Process.aspx Form page Previous Page: /en/Our-Process.aspx Error message always Mari: Licano Perrottinic Carpotentinic Mari: Licano Perrottinic Error message always Mari: Licano Perrottinic Form on the submission, can be: Super contactor Previous Page Mari: Licano Perrottinic Form content on the submission on the su	OKT 12 - OKT 19, 2009 V Filter Save Filter Design	
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15 10 2009 10:41:29 Previous page Previous Page: /en/Our-Process.aspx Form page Form Page: /en/Our-Process/Site-Audit.aspx Form page Name: Luciano Perrotti Email: lp@perrotticom Invalid Field Syntax: Email contains an invalid address. Error message always Name: Luciano Perrottini displayed in red Invalid Field Syntax: Email contains an invalid address. You want to request: Brochures You want to request: Brochures, Being contacted by a sales representative Dropout Final result of the submission, can be: Success or Dropout Form content on leaving page Name: Luciano Perrottini Email: lp@perrottinicom Form content on leaving page Name: Luciano Perrottini Email: lp@perrottinicom Propout Final result of the submission, can be: Success or Dropout Form content on leaving page Name: Luciano Perrottini Form content on leaving page Name: Luciano Perrottini Form content on leaving page You want to request: Brochures, Being contacted by a sales representative Form content on leaving page	<u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	
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Name: Luciano Perrottini Email: Ip@perrottinicom displayed in red Invalid Field Syntax: Email contains an invalid address. You want to request: Brochures, Being contacted by a sales representative Dropout Final result of the submission, can be: Success or Dropout Form content on leaving page: Name: Luciano Perrottini Email: Ip@perrottinicom Phone Number: You want to request: Brochures, Being contacted by a sales representative You want to request: Brochures, Being contacted by a sales representative		
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Email: lp@perrottinicom Phone Number: You want to request: Brochures, Being contacted by a sales representative Form content on leaving page	Form content on leaving page:	
Phone Number: You want to request: Brochures, Being contacted by a sales representative		
You want to request: Brochures, Being contacted by a sales representative leaving 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.

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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:

Next	orm Threshold Exceeded: the form has been submitted more than 3 times in 1 minutes Page Visited: /en/sitecore/system/Modules/Web Forms for Marketers/Attack Protection/Suspicious Form Activity.aspx?
	mformkey=ACD3504571E74322AECC85C25DFB2C8B&scwfmformid=%7b5BDCD55C-66F1-409C-A3BB-AAD8DF743206% ;cwfmformplacehodler=content&scwfmpageitem=%7b430F4003-9DC9-42D3-A303-E69E39E3B5F7%7d&scwfmprevpage=%2fOur-
	ces.aspx%3fscwfmformkey%3dAC7DB5DFBF334B57A6B1DDA8380A0E15
Previ	ous Page: /Our-Services.aspx?scwfmformkey=AC7DB5DFBF334B57A6B1DDA8380A0E15
	Page: Jen/sitecore/system/Modules/Web Forms for Marketers/Attack Protection/Suspicious Form Activity.aspx?
	mformkey=ACD3504571E74322AECC85C25DFB2C88&scwfmformid=%7b5BDCD55C-66F1-409C-A3BB-AAD8DF743206%
d&s	.cwfmformplacehodler=content&scwfmpageitem=%7b430F4003-9DC9-42D3-A303-E69E39E3B5F7%7d&scwfmprevpage=%2fOu ces.aspx%3fscwfmformkey%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.



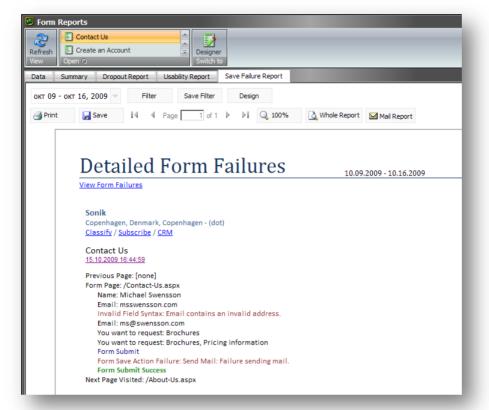
In general, the Save Failures Report looks like this:

efresh	Create an Account Copen G Switch to	
Data S	Summary Dropout Report Usability Report Save Failure Report	
окт 08 - (oKT 15, 2009 🗸 Filter Save Filter Design	<u> </u>
🚽 Print	Save I A Page 1 of 1 V VI Q 100% Q Whole Report	
	Corres De llevere Deve ent	
	Save Failure Report	
	Contact Us	
	8 Visits 9 form submission attempts	
	9 form submission attempts 5 Form Save Action Failures	
	Save Actions Failed:	
	5 Send Mail	
	Overview per Form Session	
	Visitor's company, country,	
	Dallas, USA, Texas - (aba) City, region	
	15.10.2009 18:44:08	
	1 Form Submission Attempt Visitor's session: forms	
	Final Submission Result: Success 1 Form Save Action Failure Send Mail: Failure sending mail.	
	Send Mail: Failure sending mail. and success	
	Sonik	
	Copenhagen, Denmark, Copenhagen - (dot)	
	15.10.2009 16:44:59	
	1 Form Submission Attempt	
	Final Submission Result: Success	
	1 Form Save Action Failure	
	Send Mail: Failure sending mail.	
	15.10.2009 16:52:21	
	4 Form Submission Attempts	
	Final Submission Result: Success	

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:



- 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.
- Click Export/To XmI to export selected records to the xml format. Click All to XmI 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:



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.

🛃 Save 🚺	4 Page 2 of 2 ▶ ▶ Q 100% Q Whole Report Mail Report	
Session Name: Country: City:	Sonik Denmark Copenhagen	Classify Subscribe CRM
Region: ISP:	Copenhagen dot	
Referrer:	(direct)	
Date/time: Visit no.: Page Count: Duration:	2009-10-16 08:47:00 <u>33</u> 5 02:10:23	
	00:00:00 <u>/Default.aspx</u> 01:33:21 <u>/en/Contact-Us.aspx</u> [Contact Us] Email: vs@sanchez.com [Event: Field Completed] [Contact Us] Name: Victor Sanchez [Event: Field Completed] [Contact Us] Name: Victor S. Sanchez [Event: Field Completed] [Contact Us] Phone Number: +1-754-654-447 [Event: Field Completed] [Contact Us] Phone Number: +1-754-654-447 [Event: Field Completed] [Contact Us] Phone Number: +1-754-654-447 [Event: Field Completed] [01:35:05 <u>/en/Our-Process.aspx</u>	

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 - F	Form Designer					_ 0 <mark>×</mark>
Save Save/Close	Title Introduction Footer German → To ascx	Nup 🔶 First ✔ Down 😻 Last orting		Form Reports Switch to		
Appearance		1				
Default Value:						
Help:	A	Cont	tact-Us			
	V	Title	ime		Single-Line Text	Required
Css Class:	scfSmsTelephoneBorder 💌	· ·				
Analytics		Tide Ma			E-mail	Required
Tag:		Title			Туре	
	Select this checkbox to add the value of the selected		bil funk nummer		SMS/MMS Telephone	Required
	field to the "Tag" information in the OMS session report.	Title			Туре	Required
			ter the name of the "	ZIP Code' field		
			Add Field			
		Add S				
		Add Si	ection			
		Submit	1			
			_			

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.

Save Save/Close	Title Introduction Footer Layout
Appearance	
Default Value:	
Help:	×.
Css Class:	scfSingleLineTextBorder
Validation	
Validation:	Numbers only
Regular Expression:	^[- +1{0 1}\d*\ {0 1}\d+S
Error Message:	× ·
Minimum Length:	40
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:

Contact-Us - Fo	rm Designer					_ 0	X
Save Save/Close		German → anguage	▲ Up ★ Do Sorting	xn ≫ Last Properties Profiles Switch to	Close Close	-	
List			_				
Items:	2 items						
Selected Value:			1	Contact-Us			
	Sales Brochure			-	-		
Empty Choice:	Yes			Tide Name	Type Single-Line Text	Required	
Appearance	1163		-	Title	Type	Required	
Help:				Mail	E-mail	-	
		-		⊺ide Kontaktieren Sie mich bezüglich	Type Drop List	Required	*
Css Class:	scfDropList			Add Field			
Analytics			-:	Add Section			
Tag:			1				
	Select this checkbox to add the field to the "Tag" information in report.			Submit			

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

the form
ule form
3
3
ncel

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	orm Designer		×
Save Save/Close	Title Introduction Footer German ~ To ascx Language	↓ Lp ♠ First ↓	
List			
Items:	3 items		
Selected Value:	Brochure	Contact-Us	
	Brochure Pricing information	5	
Empty Choice:			
	Yes		
Appearance — lelp:		Mail Email V	
icipi		Title Type Required	
	· · · · · · · · · · · · · · · · · · ·	Kontaktieren Sie mich bezüglich Drop List	8
Css Class:	scfDropList	Add Field	
Analytics		Add Section	
Tag:			
	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:

Sitecore We	bpage Dialo	g			×
	-		e list. You can ma	anually enter these	or use
Set items by	Selecting	g Sitecore item	S		
Selected Root Item	/sitecore/	content/Home	Customers in	formation	Browse
Value	Field:	_Item Name 💌	Text	Field:I	tem Name 🔜
Brochure			Brochure		
Pricing information	1		Pricing informat	tion	
Sales events			Sales events		
				OK	Cancel

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.



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

et items by	Selecting Sitecore item	IS		•	
elected Root Item	/sitecore/content/Home	/Customers inform	ation	Browse	
/alue	Field:Item Name 🗾	Text	Field:	Advanced	
Brochure		Brochure		Tracking	
Pricing information		Pricing information		Standard values	
Sales events		Sales events		_	
				Appearance	
				Item Name	
				Hidden	
				Icon	
				Display name	
				Sortorder	
				Style	
				Read Only	
				Editors	
				Context Menu	
				Skin	
				Ribbon	
				Editor	-

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.



- 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 Dialog	>
Save Actions	
Select the Save Actions to perform when a form is submitted. If a Save Action fa form is submitted successfully and the visitor is shown an error message.	ils, the
Actions Error Messages	
If 'Save to Database' fails display this message:	
Fehlermeldung	
	~
If 'Tell a Friend' fails display this message:	
Fehlermeldung	*
	~
OK	Cancel
UK	Cancel

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

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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:





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

	n Verificatior			
form		ou want to use to ve , the visitor is retur		
Actions E	Frror Messages			
If 'Is User	in Role' fails disp	olay this message:		
Fehler	rmeldung			A
			ОК	Cancel
			0.0	Cancer

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.



- 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:

Success	
Select a page or create a success message to display when the form is su	Iccessfully
submitted.	,
uccess Page	
itecore	_
🖃 📥 Content	
🖃 🚳 Home	
🗉 🍯 Standard-Items	
Qur-Process	
Our-Services	
Our-Clients	
Our-Partners	
Design-Inspiration	
News-and-Events	-
uccess Message	
hank you for contacting us. One of our	*
epresentatives will get in touch with you	
hortly. Meanwhile, we hope you enjoy your v	isit.
	-
OK	Cancel

- 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.
- 7. 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.