



Web Forms for Marketers 2.1

What's New?

An Overview of the New Functionality in Web Forms for Marketers 2.1

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Chapter 1

Introduction

Welcome to Web Forms for Marketers 2.1!

The main purpose of the Web Forms for Marketers 2.1 release is to enhance the existing functionality of the module in order to ensure that marketers are given the tools to solve the vast majority of challenges associated with creating effective forms.

The new features are mainly focused on giving the marketer full and complete control over the user experience, and being able to modify specific aspects of the form and its subsequent actions to effectively target different visitor groups and segments. The new release also further enhances the marketers' ability to attach complex and targeted business logic to the form, to ensure the best experience for each visitor, and to maximize the return on the information the visitor has provided.

This document introduces new features in Web Forms for Marketers (WFFM) 2.1 from the perspective of someone familiar with WFFM 2.0. There are a number of new features, which include:

- Localization and Targeted Error Messages
- New and improved Submit Actions
- Robot Attacks Protection
- Other enhancements

This document contains the following chapters:

- Chapter 1. Introduction
- Chapter 2. Localization and Targeted Error Messages
- Chapter 3. New and Improved Submit Actions
- Chapter 4. Robot Attacks Protection
- Chapter 5. Other Enhancements

Chapter 2

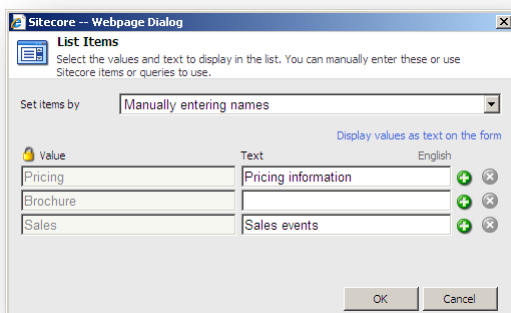
Localization and Targeted Error Messages

With Web Forms for Marketers 2.1 you can fully localize and translate all aspects of your form in just a few minutes.

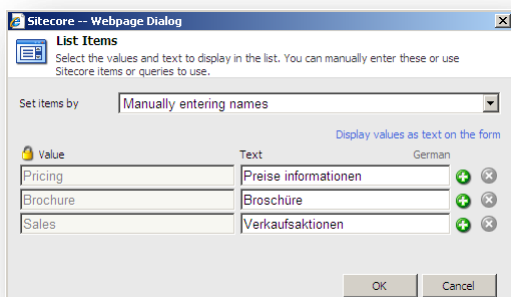
Localized list fields

List fields and the items can now be fully localized. An item can have a single value for statistical purposes but be displayed in multiple languages.

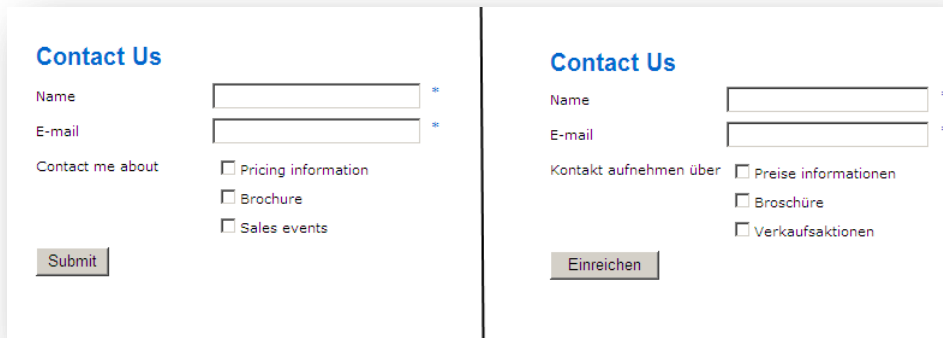
The user creates a list field in the original language:



Then the user creates a new language version (for example, in German) of the form and enters translated list field values:



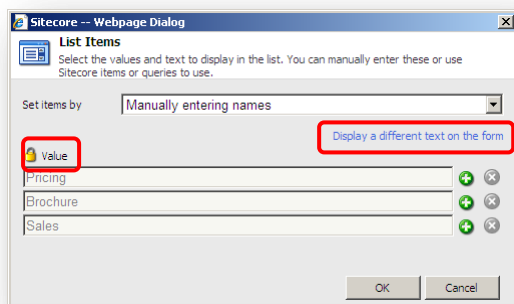
This is how the form is displayed in both languages on a Web site:



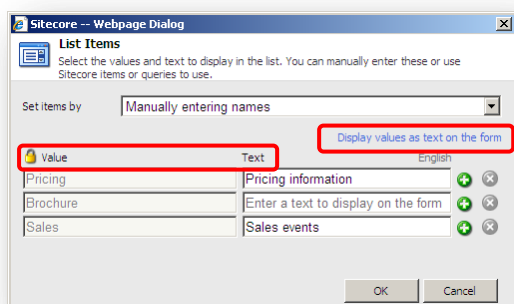
Value / text pairs

The ability to store one value in a list but display a different text, is also potentially powerful tool when working with complex integration to 3rd party product such as CRM and ERP systems.

The user configures a list field to display list field values on a Web site:



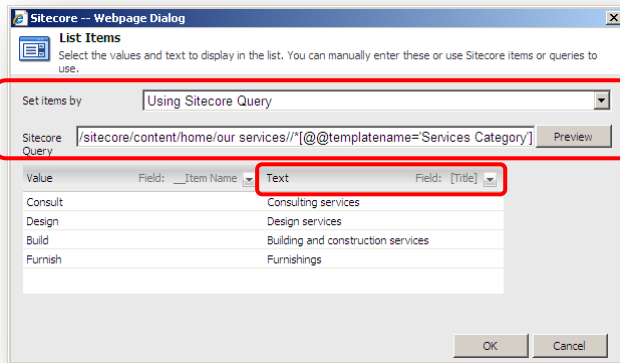
Or to display a different (user-friendly) text on a Web site:



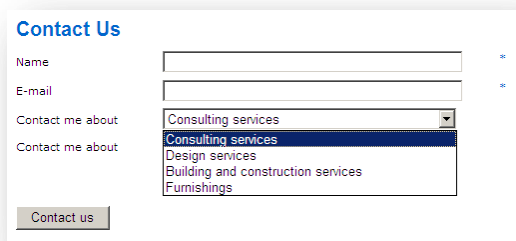
Build lists with queries

Previously list items could be created manually or populated using Sitecore items, The module now lets the user use various types of queries to create list items from different parts of your content tree, including Sitecore query, fast query and XPath query. This gives the developer a large amount of flexibility when create complex or ad hoc list structures.

The user enters an appropriate query, selects an item field to be displayed as a text and the list field is configured:



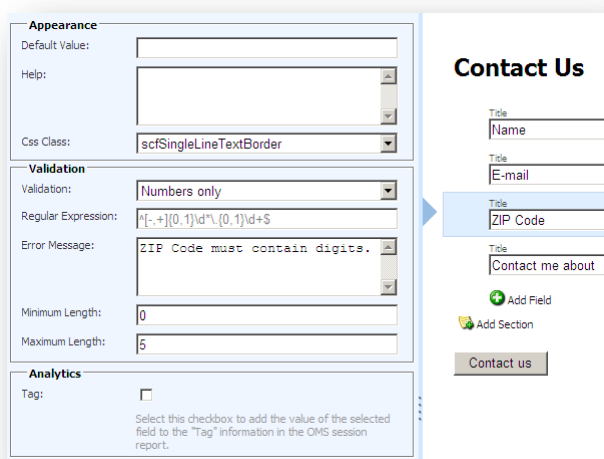
This is how this field is displayed on the Web site:



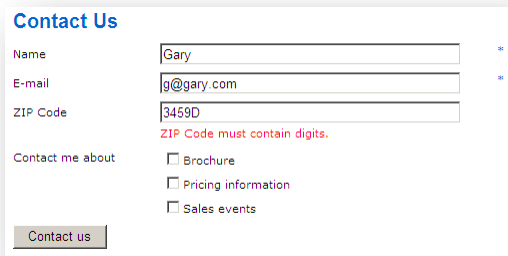
Targeted Error Messaging

Targeted error messaging on each individual field in a form allows the marketer to dictate exactly what error messages the visitor will see in each failure scenario. This gives the marketer full end-to-end control over the user experience. This is also vital for full localization.

The user edits a form in the Form Designer, selects the field and enters an error message:



This is how this message is displayed to the visitor:



The screenshot shows a 'Contact Us' form with the following fields and options:

- Name: Gary
- E-mail: g@gary.com
- ZIP Code: 3459D
- Contact me about: Brochure, Pricing information, Sales events

Red error messages are displayed below the E-mail and ZIP Code fields:

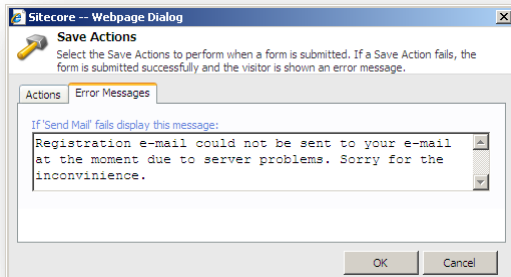
- Under E-mail: *
- Under ZIP Code: ZIP Code must contain digits.

A 'Contact us' button is located at the bottom left of the form.

Submit Action Error Messaging

Each Submit Action on each form can also be configured with individual error messages for each form in every language.

To configure a submit action error message, the user edits a save action or form verification, clicks the Error Message tab and enters an error message:



Chapter 3

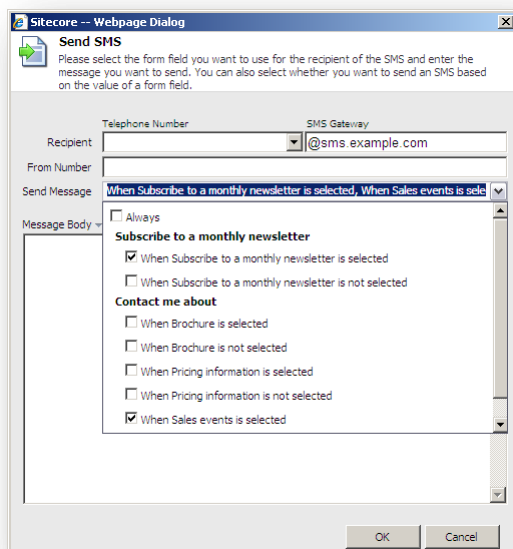
New and Improved Submit Actions

Web Forms for Marketers 2.1 Submit Actions gives the user the tools to meet their increasingly complex business needs, by expanding the flexibility to build this logic and including even more out-of-the-box actions.

Conditional rules for building complex business logic

The user can now trigger many of our default Submit Actions based on the values provided in checkboxes and lists by visitors who are filling out forms on your sites. Combine selections of positive and negative responses to target specific actions at specific customer groups.

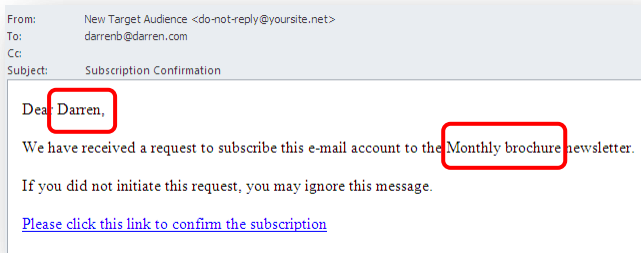
For example, the user wants an SMS to be sent to the visitor if they select the **Subscribe to a monthly newsletter** and the **Sales events** check boxes. Edit a save action and choose appropriate conditions:



Email Campaign Manager Integration

The new Subscribe to Target Audience and Send Standard Message save actions provide integration with the Email Campaign Manager. These save actions allow you to subscribe Web site visitors to a target audience and then use the Email Campaign Manager's standard messages to actively respond to visitors on your Web sites. These messages can already be personalized, but Send Standard Message save action allows marketers to personalize them further by including information provided by the visitor when filling out a form.

An automatically created email message might look like this:



Send SMS Save Action

The new Send SMS Save Action allows users to send SMS messages to visitors who fill out a form, and personalize this form based on information provided in the form.

Send MMS Save Action

The new Send MMS Save Action allows users to send rich MMS messages (including images and links) to visitors who fill out a form, and personalize this form based on information provided in the form.

Telephone, SMS/MMS Telephone field types

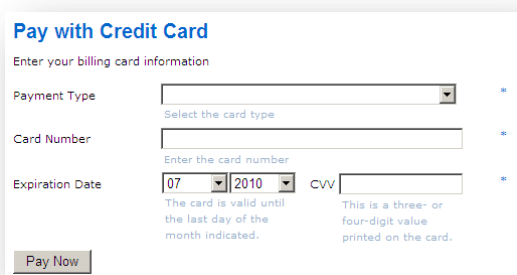
The new Telephone and SMS/MMS Telephone field types make it easier to verify phone numbers provided by visitors and provide support for the new Send SMS and Send MMS Save Actions.

Role membership verification

The “Is User in Role” Form Verification enables you to trigger actions based on whether or not a user is a member of a role. This allows you to leverage Sitecore’s security model to enact complex business logic in order to target specific actions to specific customer groups.

Credit Card form


The sample credit card form now includes more features commonly used during credit card verification, such as expiry date and a CVV field. Default Credit Card form looks like this:



Get Our Newsletter form

This sample form includes updated Captcha field and the Subscribe to Target Audience save action. The form lets you quickly create a subscription form.

Default Get Our Newsletter form looks like this:

A screenshot of a web form titled 'Get Our Newsletter' in blue text. Below the title is a text input field with the label 'Email' in purple text to its left and a small asterisk to its right. Below the input field is a grey button with the text 'Subscribe' in white.

Chapter 4

Robot Attacks Protection

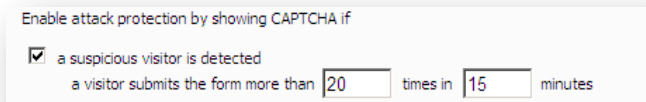
The Web Forms for Marketers module gives you the tools to protect your Web site from robot attacks. The Captcha field can help you to distinguish between real users and robots and, thus, protect your Web site and Web services from abuse by programs masquerading as real users. A Captcha field requires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

Configuring Protection

The Web Forms for Marketers module lets the user choose appropriate level of the robot attacks protection. The user chooses when to display the Captcha field: every time for every form or 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.

This case requires the user to enter the limit of submits and the period of time:




Enable attack protection by showing CAPTCHA if

a suspicious visitor is detected
a visitor submits the form more than times in minutes

- *Suspicious form activity is detected.* The form is submitted several times in a short period of time by one or more users.

This case requires the user to enter the limit of submits and the period of time:

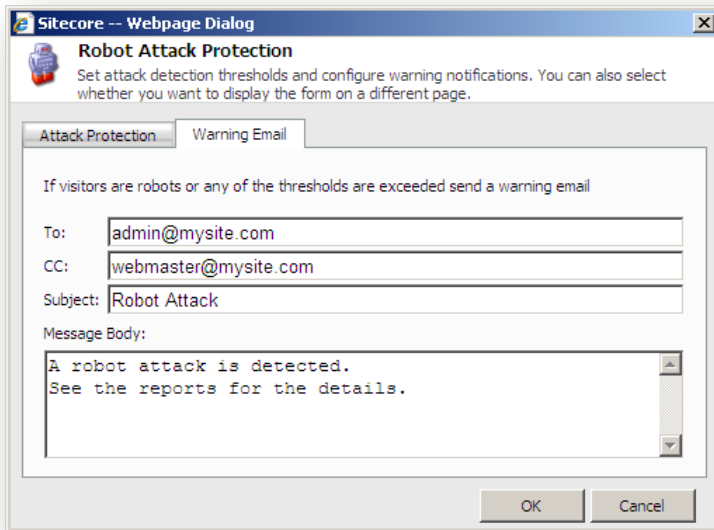


suspicious form activity detected
the form is submitted more than times in minutes

E-mail Notifications

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 message with the predefined text to the specified recipients.

To activate warning e-mail notifications, the user enters the recipient of the message, the subject and the body of the message:



Once a robot attacks the Web site, an appropriate e-mail message is sent to the specified recipient.

Chapter 5

Other Enhancements

Accessibility compliance

Web Forms for Marketers is fully WCAG 2.0 level AA compliant. This ensures that Sitecore sites can offer a high-quality accessibility experience for all users.

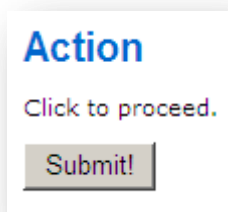
Form Reports – Oracle Support

The Dropout, Usability and Failure reports are now supported for Oracle.

One button, no fields

Forms can now be comprised of a single submit button with no fields. This useful in cases where you want to provide actionable links which trigger complex actions on your site, especially in the case where the visitor is already authenticated.

A form with no fields might look like this:



Minor enhancements

There have been numerous small fixes and enhancements included, ensuring an excellent user experience.