Welcome to GatedContent.com

Platform Overview

What is GatedContent.com

gatedcontent.com

- Cloud-Based Web Form Management Platform
- Create, Configure, Manage & Deploy Content Gates and Web Forms
- Fast Deployment
- Case by Case Customisation
- No Web Team or Marketing Automation Developers Required

Your instance of GatedContent.com has been configured for your company as part of the deployment process. It has been integrated into various parts of your marketing technology stack in order to maximize the amount of information captured and the consistency of measurement whilst delivering a great user experience for the end-user.

Training Program Overview

gatedcontent.com

Fundamentals

- Section 1
  - Welcome and Overview
- Section 2
  - Anatomy of a Gate
- Section 3
  - Creating a Gate
- Section 4
  - Installing the GatedContent.com Script
- Section 5
  - Deploying a Gate
- Section 6
  - Analytics and Reporting

Administrators

- Section 7
  - Managing Fields
- Section 8
  - Managing Form Types
- Section 9
  - Translation & Languages
- Section 10
  - Field Rules

gatedcontent.com

The Anatomy of a Gate

Understanding Gates & Forms

What is a gate?

gatedcontent.com

A gate is designed to convert a user to known in an optimal way in exchange for content or service.

A gate is an imaginary device that a user must pass through to access further information from a company. The gate utilizes a web form as the means to restrict access. Users must provide information in that form to “open” the gate and proceed to the restricted information. Information is most commonly high value content but could equally be a sign-up to an event or the means to request contact with a sales person.

What is a gate? Continued...

gatedcontent.com

A gate is considered a combination of the following information:

1. The content item e.g. document, video, webinar, contact request etc.
2. The messaging e.g. content promotion message, thank you message etc.
3. The form being used e.g. a high gate with a lot of fields or a low with less
4. The behavior of the gate e.g. should the gate stay open when a user comes back a week later?
5. The language of the gate i.e. what language should the form display in?
6. The measurement required i.e. what information should the gate send to the tech stack for optimal reporting
7. Other metadata i.e. what other parameters should be sent with the form to assist reporting or other automated features within the marketing tech stack

Open & Closed Gates

gatedcontent.com

Closed Gates

Gates are considered “closed” when a form is displayed and must be completed to access content.

Open Gates

Gates are considered “open” when a user does not have to complete a form to access content.

This could be for various reasons including:

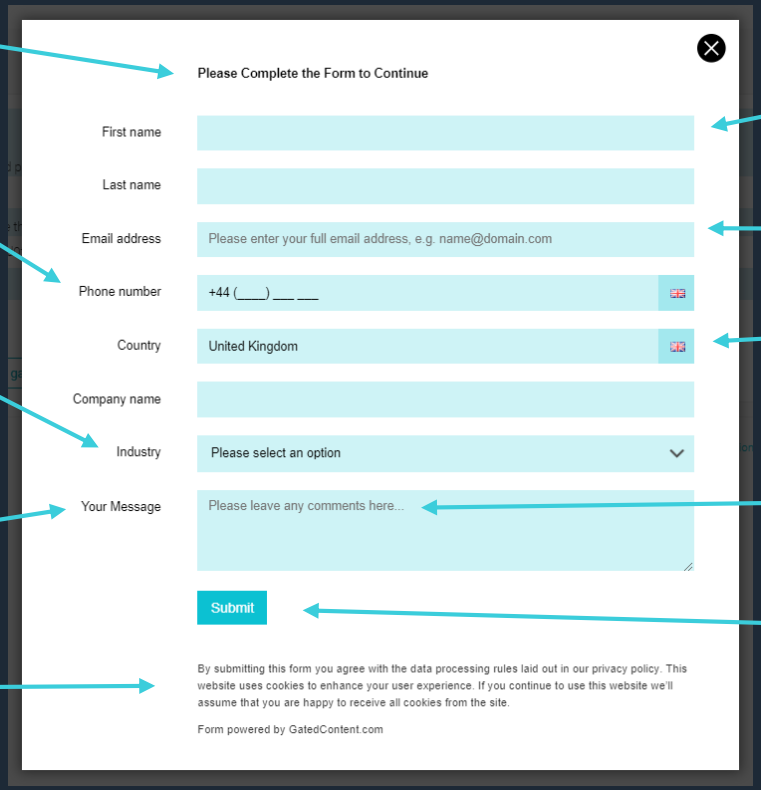
- The user already filled out the form previously
- The user completed a similar form previously
- The user is already known to a sufficient level in the marketing tech stack
- The content is deemed as lower value and we don’t wish to deploy a full gate, but still wish to capture a form submission in the background (also known as a “blind submit”)

Blind Submits

A blind submit is a form submission that occurs on the page without being viewed. The user is not aware the submission is occurring. Typically, the submission data uses pre-populated or previously submitted information

Anatomy of a Gate

gatedcontent.com



gatedcontent.com

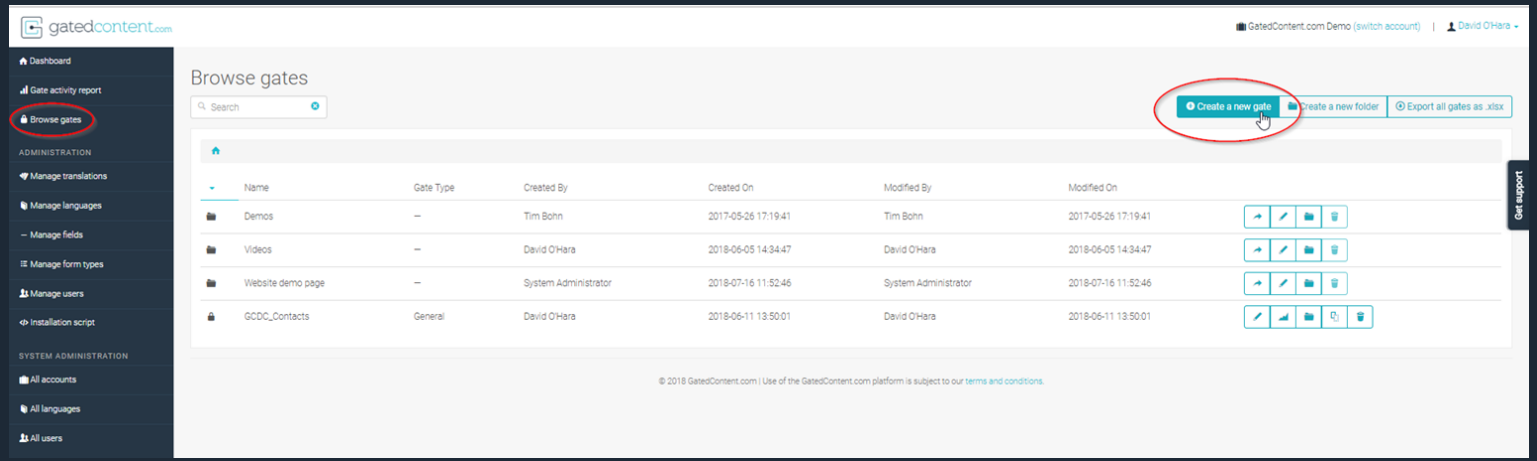
Creating a Gate

Getting to Know the Gate Editor

Creating a Gate

- To get started, navigate to Browse Gates and open the Gate Editor by clicking the **Create a new gate** button.
- The editor is split into 3 tabbed sections: Gating, Messaging and Extras.

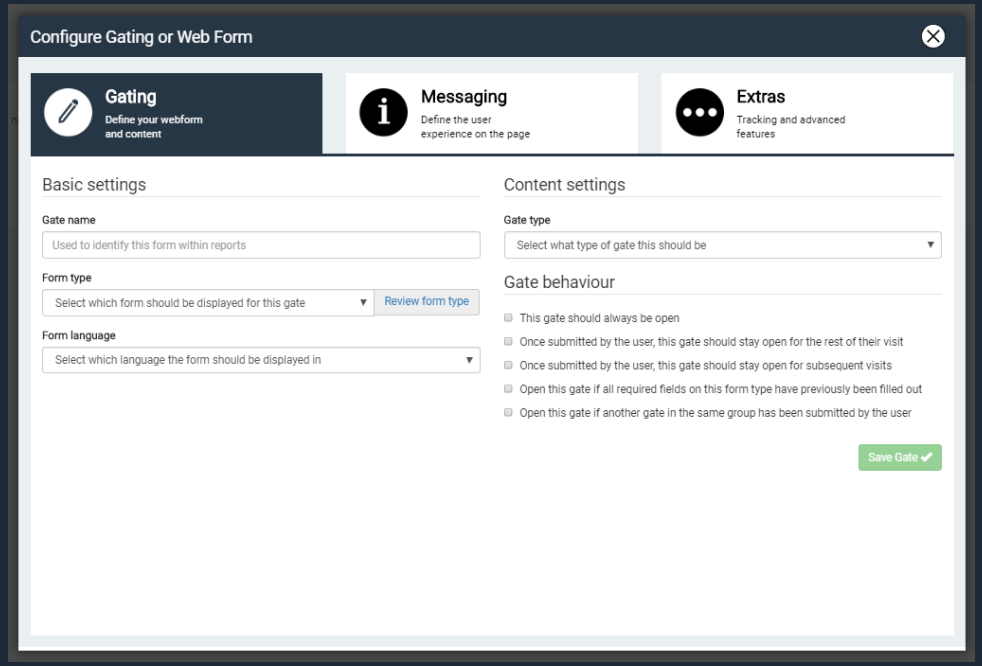
Note: Each instance of GatedContent.com has a slightly different editor. This is because each instance of GatedContent.com is customized to the integration and feature requirements of the appropriate company.



Basic Settings

gatedcontent.com

In this section you define the core information for the gate i.e. what are you gating, what form to use, and how the gate looks and behaves.



Gate Name - Identifies the form in report and can be pushed as a hidden value in submissions.

Form Type - Determines which fields are shown and captured when the form appears as well as determining how the form looks and behaves. Form types are configured by your account administrator

Form Language - Determines which language the form should be displayed.

Form Language

gatedcontent.com

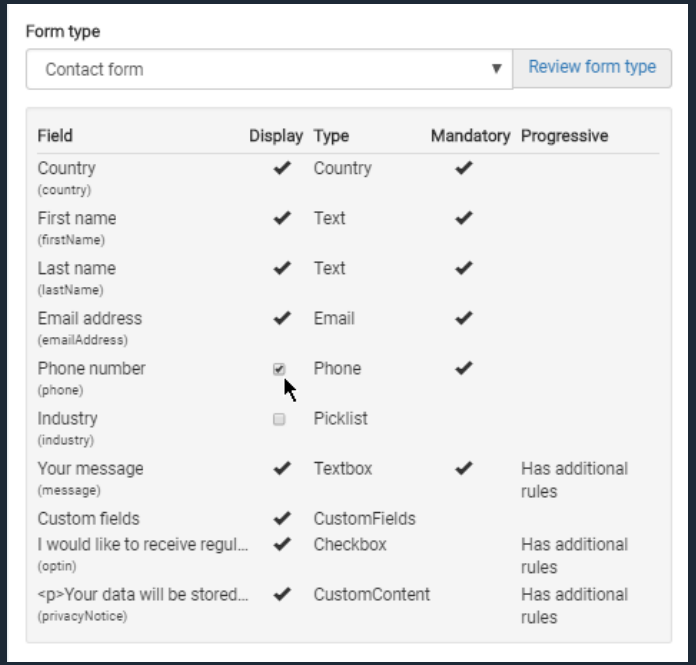
Form language determines the language the form should display in.

Most of the language in the gate is pre-translated for you.

This includes field labels, validation messaging, drop down values, opt-ins, disclaimers etc. Some text values are determined on a gate by gate basis i.e. messaging specific to the content item itself.

Remember the **Form Language** is a function of the **gate** and is set by the gate editor, **not** by the customer filling in the form.

Review Form Type



By clicking Review Form Type you can manage individual fields

Switchable fields - can be displayed or hidden by checking/unchecking the corresponding box

Mandatory Status - Determines whether or not the user **must** complete this field to submit the form.

The options displayed here are set by the form type which is configured by your account administrator

Content Settings: Gate Types

gatedcontent.com

Gate Type - Determines the type of content being gated. The options in here will be dependent on the types on content being delivered and the platforms used to deliver that content.

Typical options include:

- General (the gate is just used as an intake or contact form)
- Download (a PDF or other document)
- Video (displays video from your chosen video platform)
- Webinar (sign-up integrated to your chosen webinar provider)
- Event (sign-up integrated to your chosen event management provider)
- Page-Gate (allows gating of an entire web page by adding a modal form in-front of the content)

The option chosen will determine other options then available below.

Content Settings & Gate Behaviour

gatedcontent.com

Gate Behaviour - primarily focused on configuring how a gate opens and closes i.e. when the form is shown and when it isn't. Understanding these gate behaviour options and using them effectively can have a positive impact on UX.

Typical options Include:

- This gate should always be open
- Once submitted by the user, this gate should stay open for the rest of their visit
- Once submitted by the user, this gate should stay open for subsequent visits
- Open this gate if all required fields on this form type have previously been filled out
- Open this gate if another gate in the same group has been submitted by the user

Download URL/text - shown for Download gate types. The URL to the document and the text shown on the button to start the download. Some configurations will also have auto-download enabled as well as a download button.

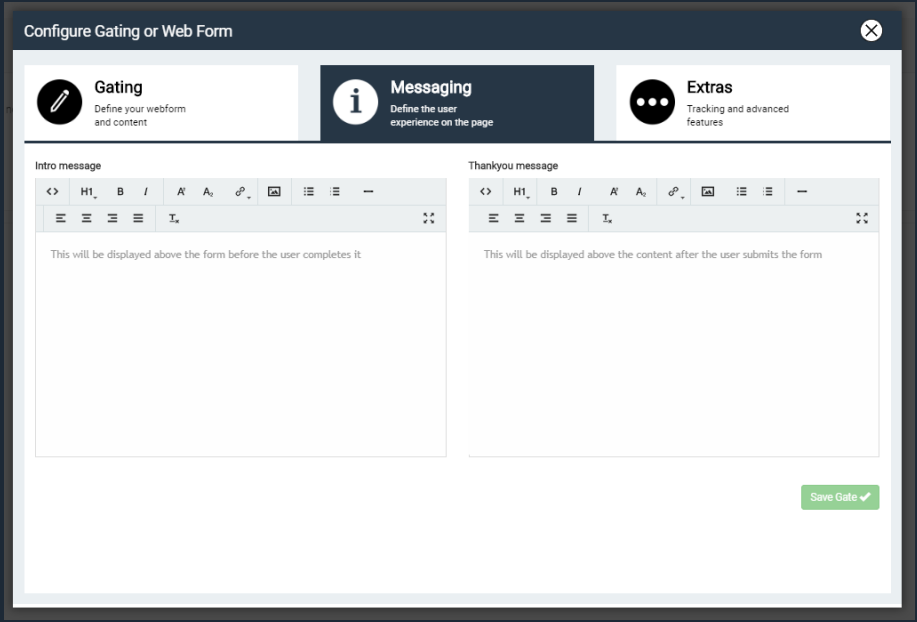
Video ID - shown for Video gate types. The ID of the video stored in your chosen video platform

Webinar ID - shown for Webinar gate types. The ID of the webinar created in your chosen Webinar platform.

Event ID - shown for Event sign-up gate types. The ID of the event created in your chosen Event management platform.

Messaging

In this section you define the messaging specific to the gate that the user will read or view



Intro message - The HTML content displayed when a user first encounters the gate and the gate is closed. Usually displayed at the top above the form. A rich text editor is provided to manage the content.

Thank you message - The HTML content displayed immediately after a form has been completed. Typically accompanied with the delivery of the content itself e.g. the embedded video or download button. A rich text editor is provided to manage the content.

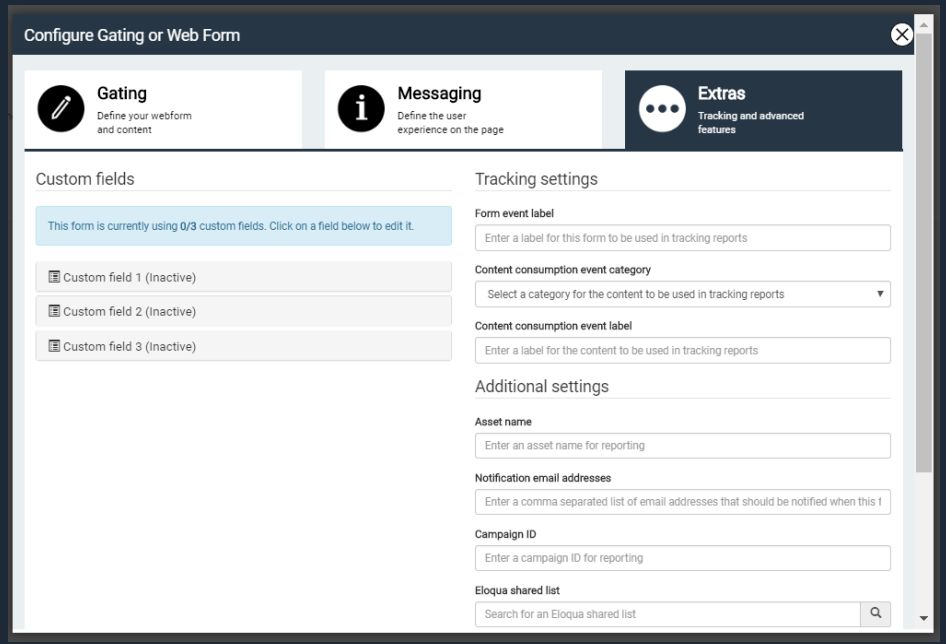
Gate open message - The HTML content displayed on a returning visit to the page if a gate is configured to stay open. Typically accompanied with the delivery of the content itself e.g. the embedded video or download button. A rich text editor is provided to manage the content.

Note: in some situations, this text may not be shown. For example, a download gate deployed as a modal will not show this message. The user will click the link to the gate and the download will trigger straight away without showing the modal or a message.

Extras & Custom Fields

gatedcontent.com

Custom fields typically send submission data across into generic containing fields. There are 2 fields per questions. One field contains the question text, the other is for the responses from users.



Custom fields - Some instances will have the ability to add additional fields to a form on a gate by gate basis. Extra fields are usually added at the bottom of the form. Click on the wording “Custom field” to open the rolldown, then the follow options are available:

Field type - the type of form input (Text, Long Text, Dropdown, Checkbox, Hidden field)

Question text - the label or wording associated to the field input

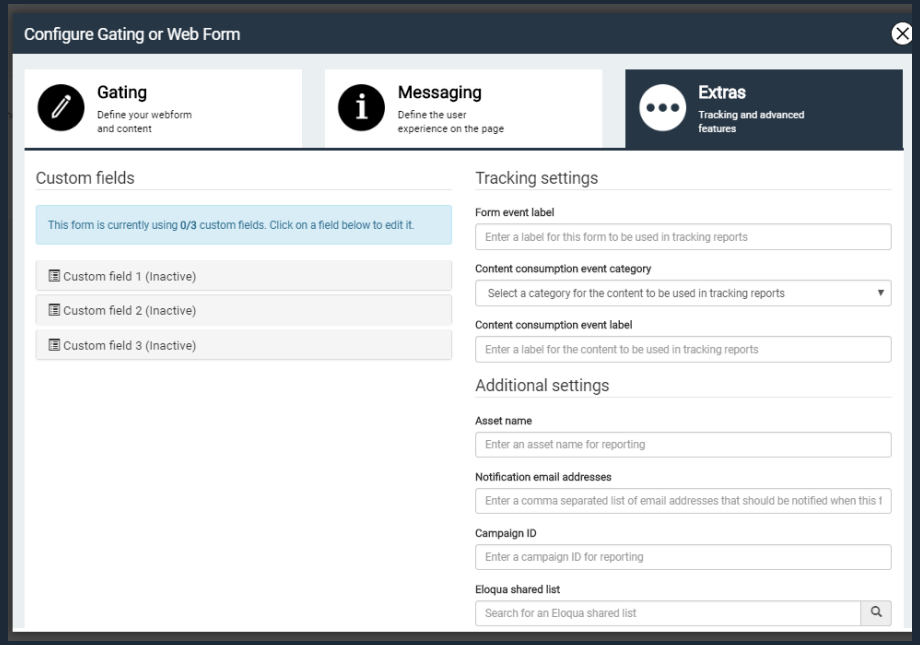
Field options - the available options and values in a dropdown fields. Each option is entered on a new line. If you wish to provide display text and values for dropdown options separate values from text using a pipe separator e.g. value|displaytext.

Field value - the value sent across in a hidden field

This field is required - Determines if the field is mandatory

Tracking Settings

In this section you define any additional features and metadata used for data and measurement which are specific to your account



Asset name/ID - A value representing an ID or Name identifying the asset piece or marketing interaction associated with the gate. Used in reporting or analytics and to identify the gated content piece in the submission data.

Campaign name/ID - A value passed across in the submission data. Often used to identify the form or gate for processing in Marketing Automation.

Notification email - Passes one or multiple email address into the receiving Marketing Automation platform as part of the form submission. If supported by the Marketing Automation platform an email can be configured to be sent to those email addresses as a way of notifying administrators that the form has been completed.

Repost to Eloqua Form - If supported by the Marketing Automation platform a form submission can be re-posted on to the URL provided. This option is used where a secondary form may be required to process or trigger data as part of a campaign or program.

gatedcontent.com

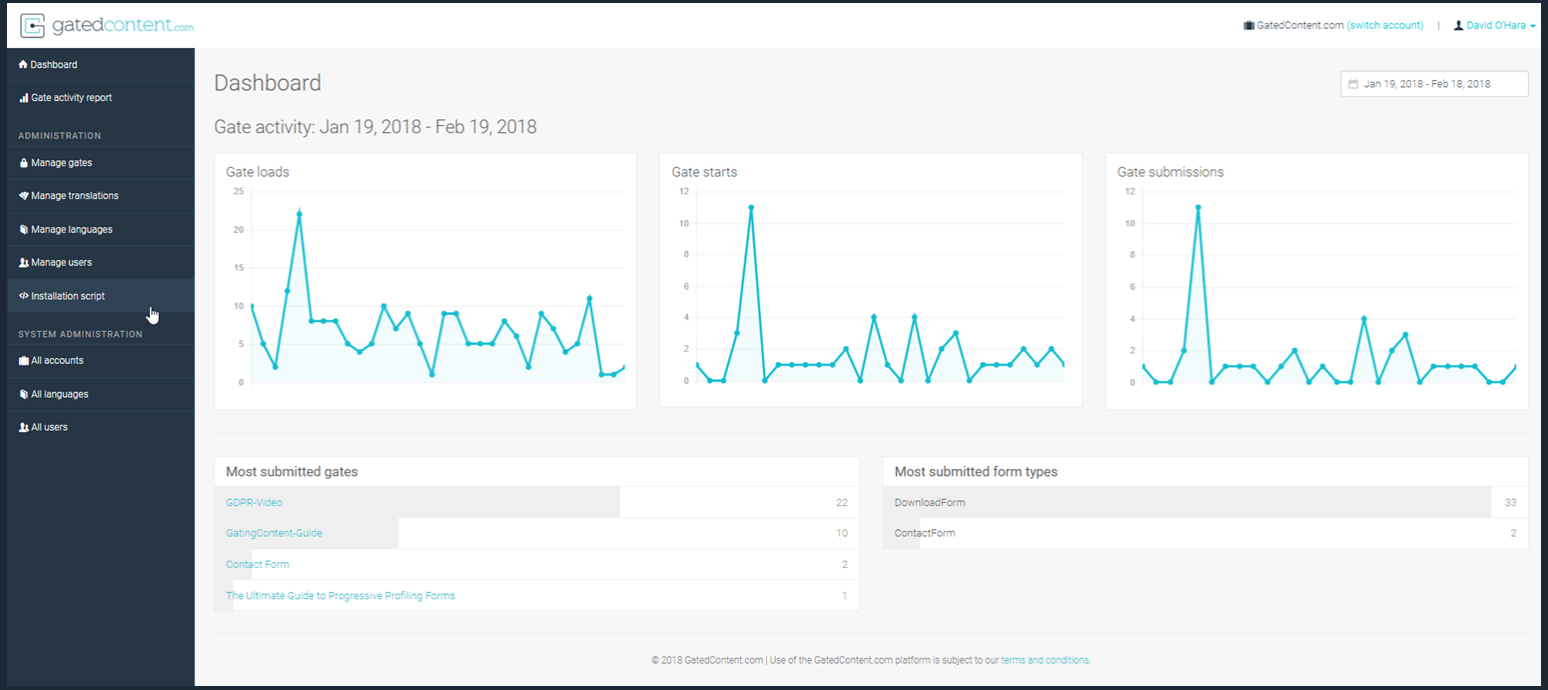
Installing the GatedContent.com Script

Enable GatedContent.com on your webpages

Find the Installation Script

gatedcontent.com

Using the navigation menu on the left-hand side of the page select **Installation Script**



Copy the Installation Script

gatedcontent.com

Highlight and Copy the Installation Script

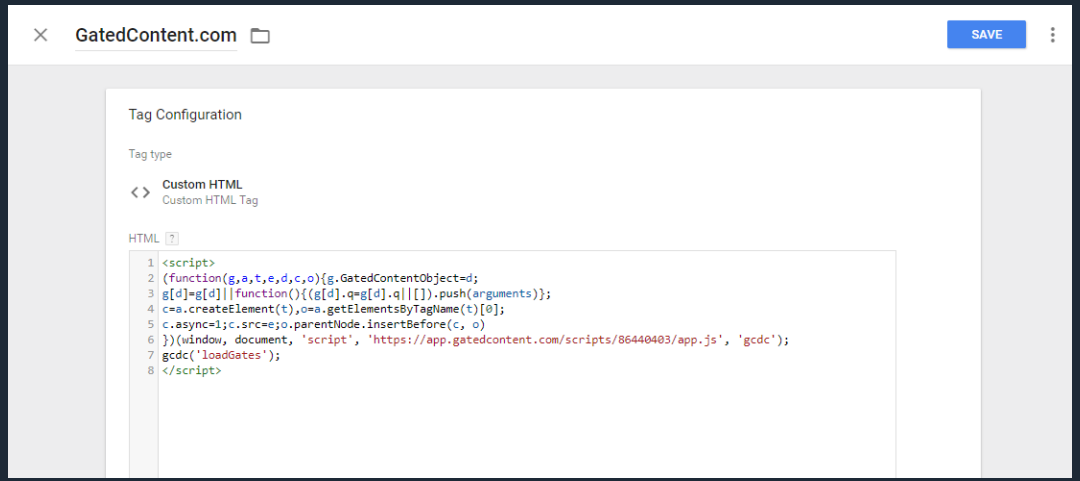
By placing this code on every page of your website you will be deploying gates to it will allow users to be tracked and GatedContent.com forms to render.

Installing the Script

If you are using a tag management system, such as Google Tag Manager, Adobe DTM or Tealium, simply inject the GatedContent.com Script.

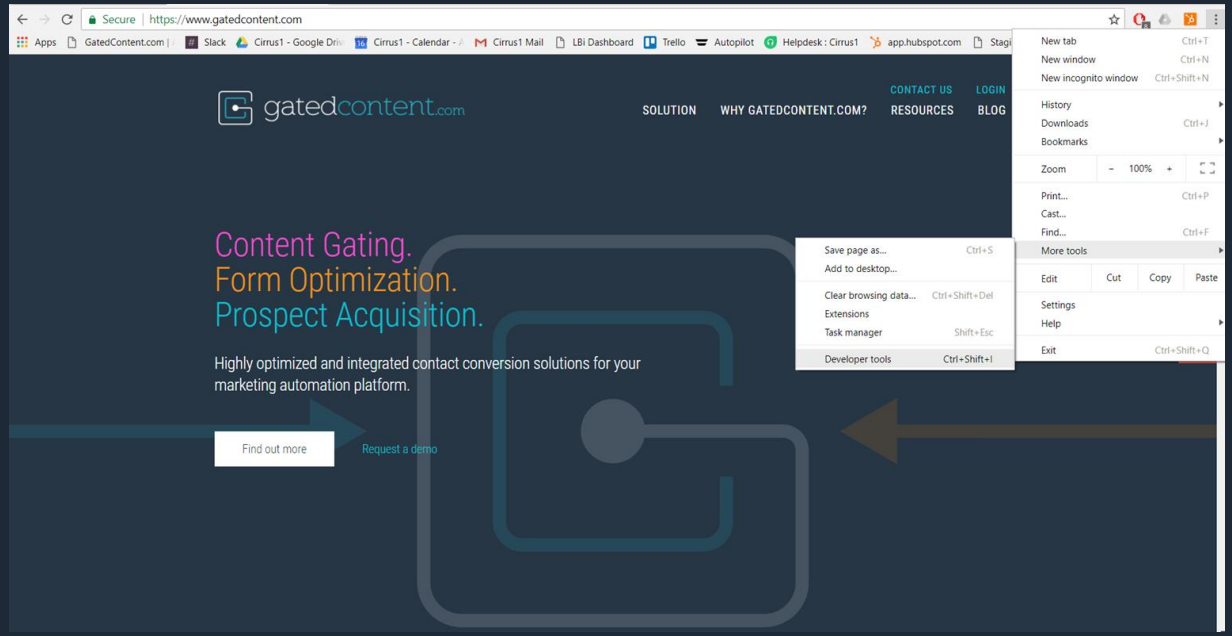
Alternatively, you can paste the script just before the closing body tag in your web template.

Ensure you have added this script to every web page that you will be deploying gates to.



Checking Successful Installation

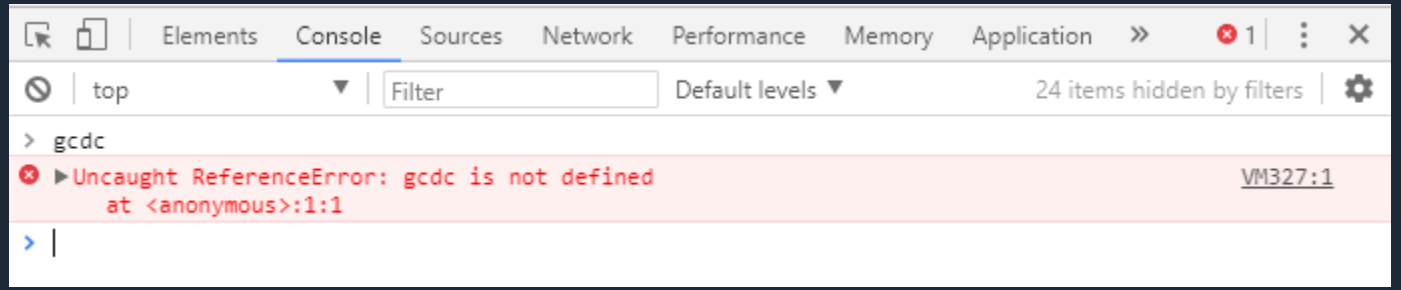
To check if the script is loading properly, open a website page where you have installed the script and open the console. In Chrome, you can find the developer tools in the menu under, More Tools > Developer Tools or you can use the shortcut Cntrl+Shift+I.



Checking Successful Installation

gatedcontent.com

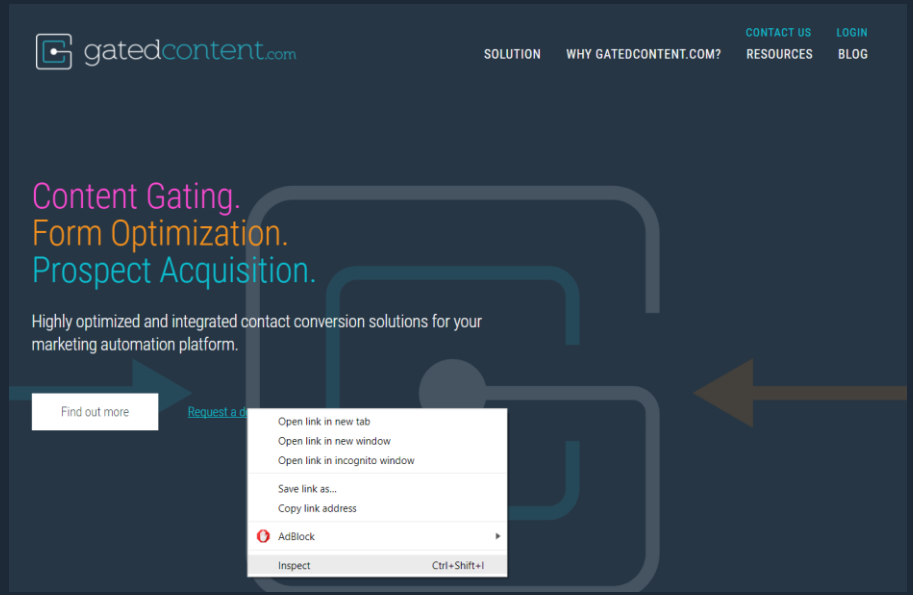
Once the console has loaded type GCDC into the input line and press enter. If the GCDC script is failing to load you will see an error message like this:



Double Install

It is very important that the GatedContent.com script only appears once in any given page. Having more that one can affect gate rendering and functionality.

To check this, again you will want to open the console (Ctrl+Shift+I) and inspect elements.



Double Install

In the elements tab search (Cntrl F) type gatedcontent.com and see if the script appears.

Please note, if you are using a tag manager you cannot use view page source to check presence of the gated content script, it must be done in the elements tab.

Now check that the installation script only appears once in the elements tab.

gatedcontent.com

Deploying a Gate

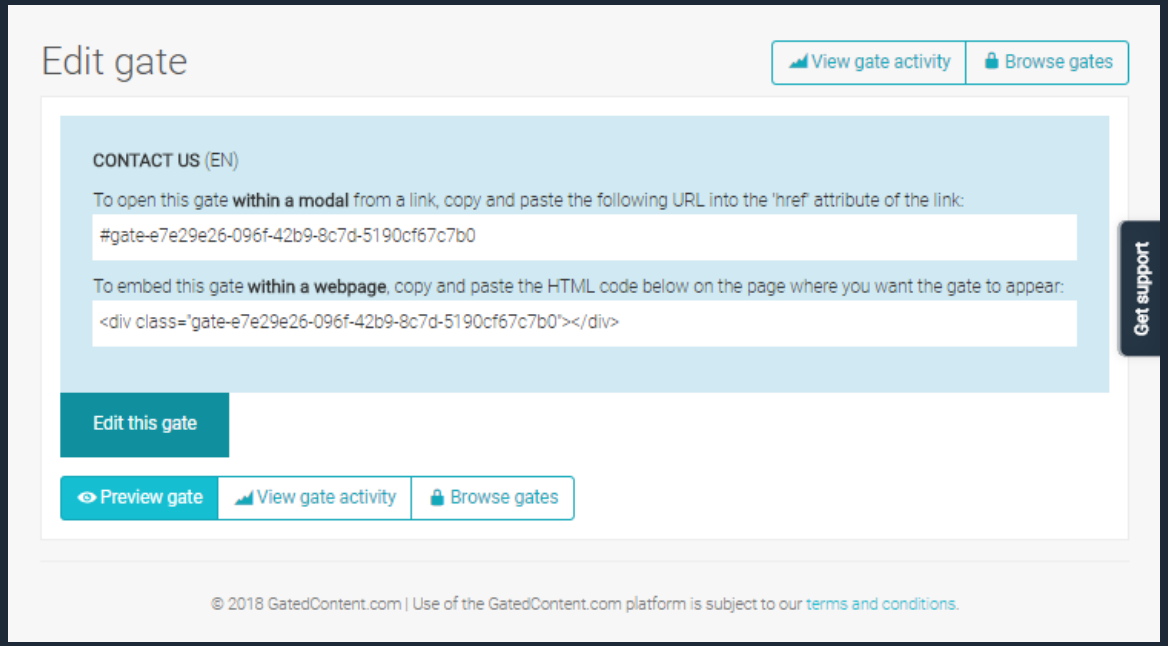
Adding Modals & Embedded Gates to your Website

Gate Embed Codes

gatedcontent.com

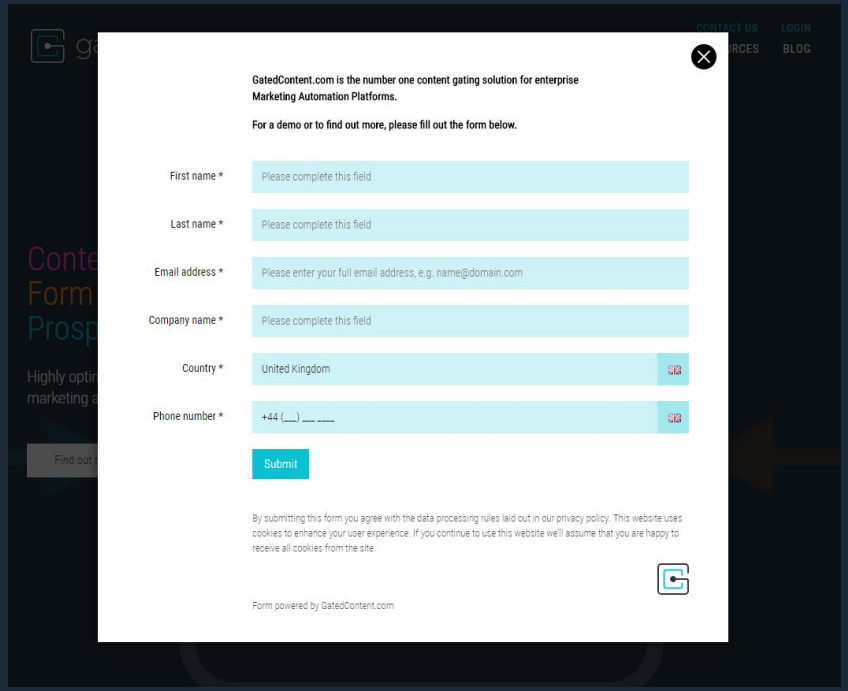
Once you have created a gate you will be shown the embed codes for using a gate in a page. You should also see a button to immediately show a preview of the form.

When deploying a gate, you can use one of two embed methods. Each method has its own embed code for each gate.



Modal Deployment

A Modal Gate - Appears over the page as an overlay. It is triggered from a link on the page. To deploy a gate like this you simply use the embed code provided as the HREF of the link you want to use. The A tag used can be around a piece of text or an image.



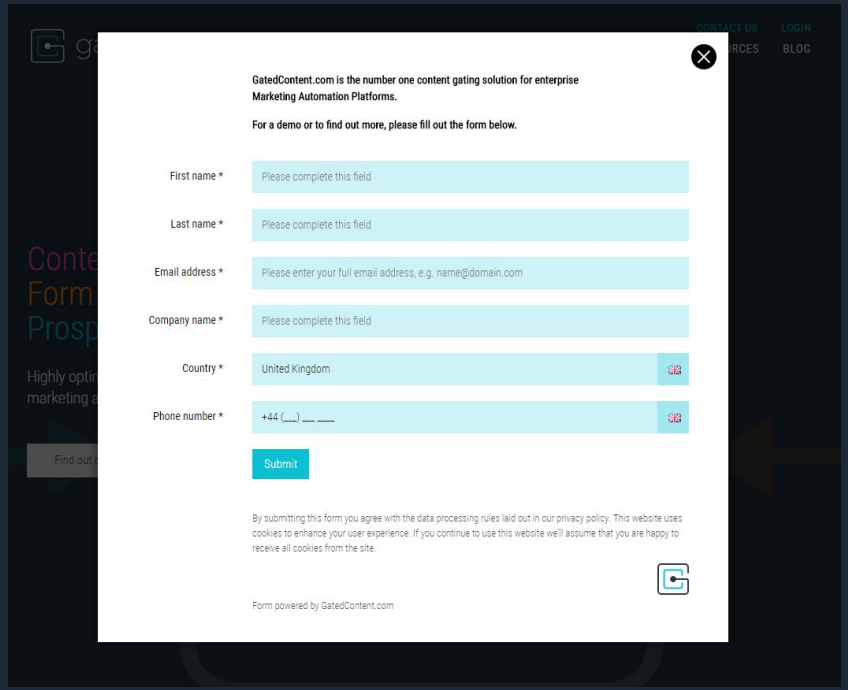
Here is an example embed code for modal gates: #gate-98ea71d5-b820-49dc-acdb-167575509999

An example link using the embed code would look like this:

Download our latest guide

Modal Deployment

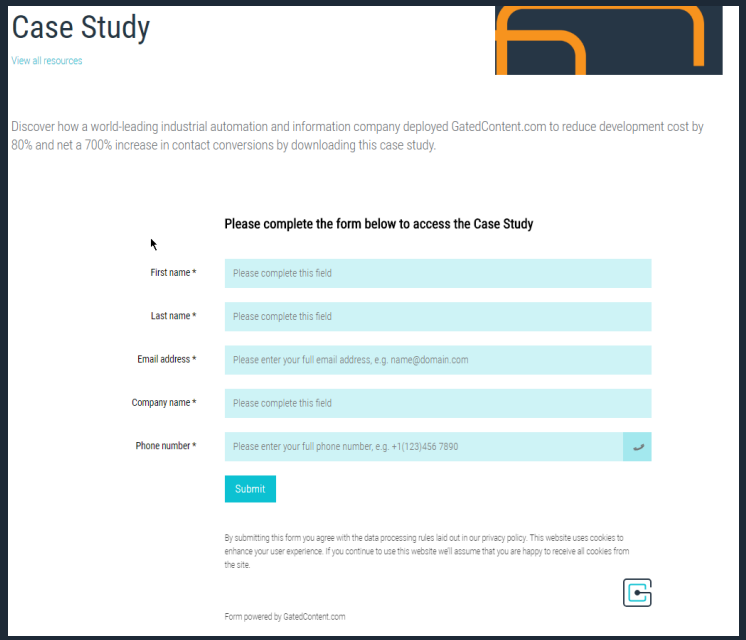
A Modal Gate - Appears over the page as an overlay. It is triggered from a link on the page. To deploy a gate like this you simply use the embed code provided as the HREF of the link you want to use. The A tag used can be around a piece of text or an image.



It is very important that you do not use your own modal solution when deploying gates of this type. This will result in a modal inside a modal scenario and can cause a variety of issues. GatedContent.com have made the process of deploying modal simple, all you have to do is use the modal embed cosd as the HREF of the link you want to use.

Inline Deployment

Inline gates - display within the page itself. Where you place in the embed code in the page is where the gate will render. Typically, forms are built responsively so will expand to fill the containing element on the page in which you place the embed code.



Here is an example embed code for inline gates:

```
<div class="gate-98ea71d5-b820-49dc-acdb-167575509999"></div>
```

gatedcontent.com

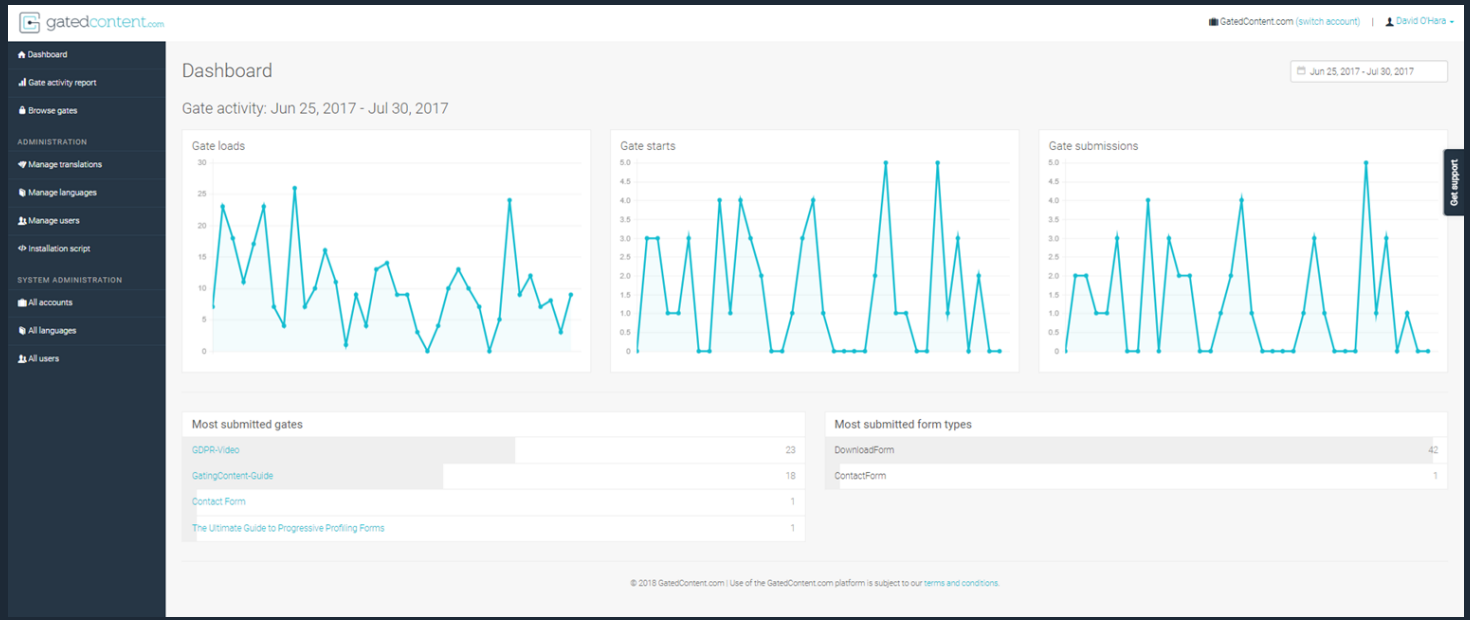
Analytics & Reporting

Understanding Gate Activity Reports

Dashboard

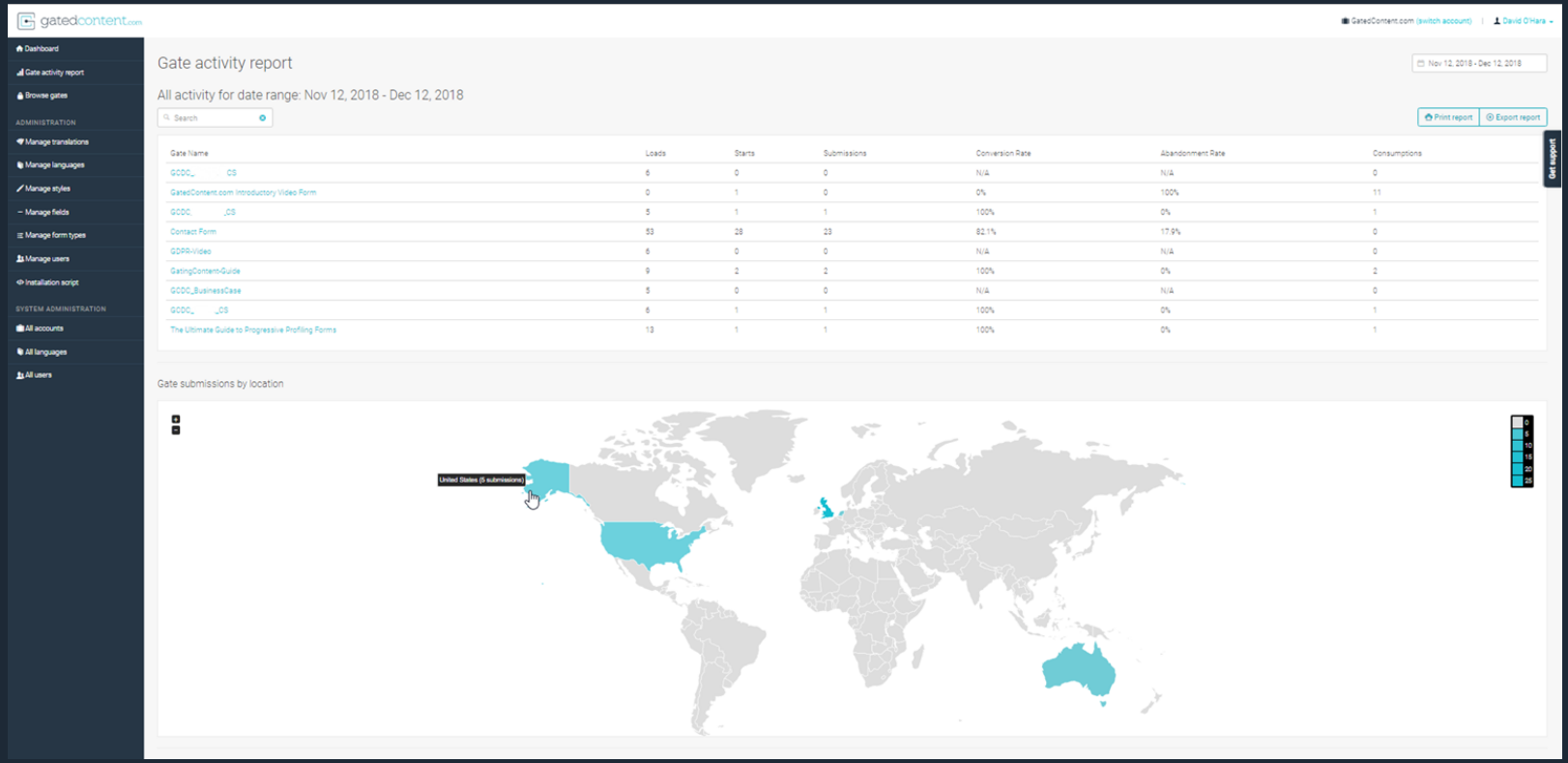
To alter the period of time shown there is a date range selector to the top right.

Standard charts in the dashboard show total figures for gate activity, most active gates and other global analytics.



Gate Activity Report

gatedcontent.com



Gate Activity Report

When looking at gate activity, the following terms are useful to understand:

Gate Load: An event recorded when a gate is viewable in a web page. When a gate is embedded inline in a page, occurs when the page is loaded. When a gate is displayed in a modal (or overlay panel), the gate load occurs when the modal is displayed.

Gate Start: An event recorded when a user actually starts the process of completing the form i.e. starts typing or selecting fields.

Gate Submission: An event recorded when a user completes and hits the submission button to send the form.

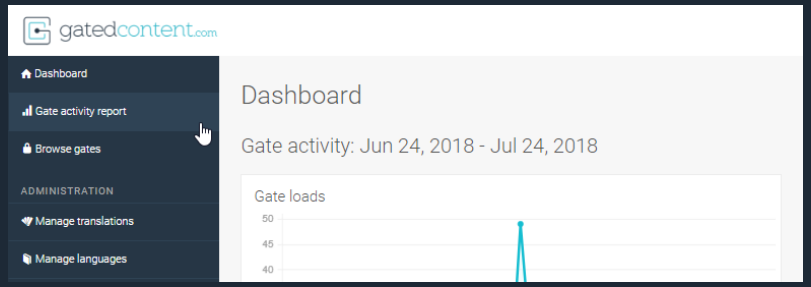
Abandonment Rate: The ratio of form starts to submissions. Gives an indication of the proportion of people that fail to complete a form after starting it. Can help with optimizing conversion rates.

Consumption event: Essentially any time a user interacts with a piece of content e.g. document downloads, video views, page views (if using a page gate).
Open gates can produce a consumption without a submission.
General gates do not have content so can have a submission without a consumption.

Exporting Gate Activity

gatedcontent.com

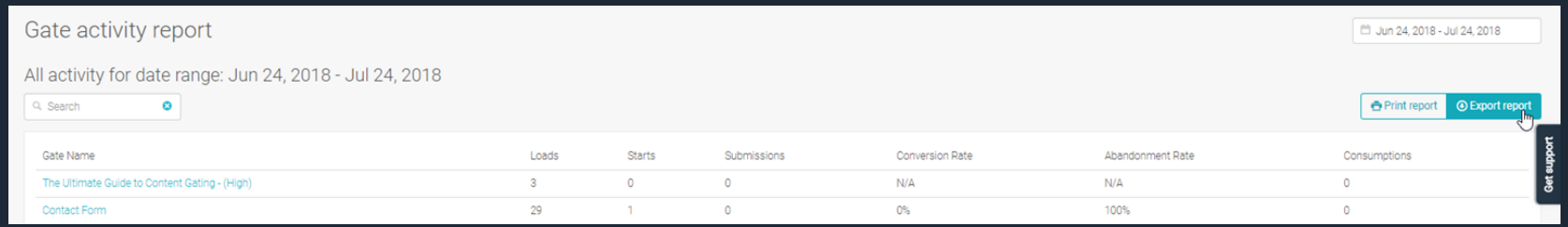
First of all you will need to navigate to the gate activity report using the menu on the left hand side



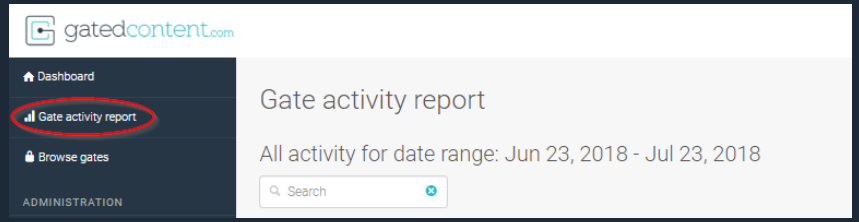
The .xls download contains:

- Gate Names
- Loads
- Starts
- Submissions
- Conversion Rate
- Abandonment Rate
- Consumptions

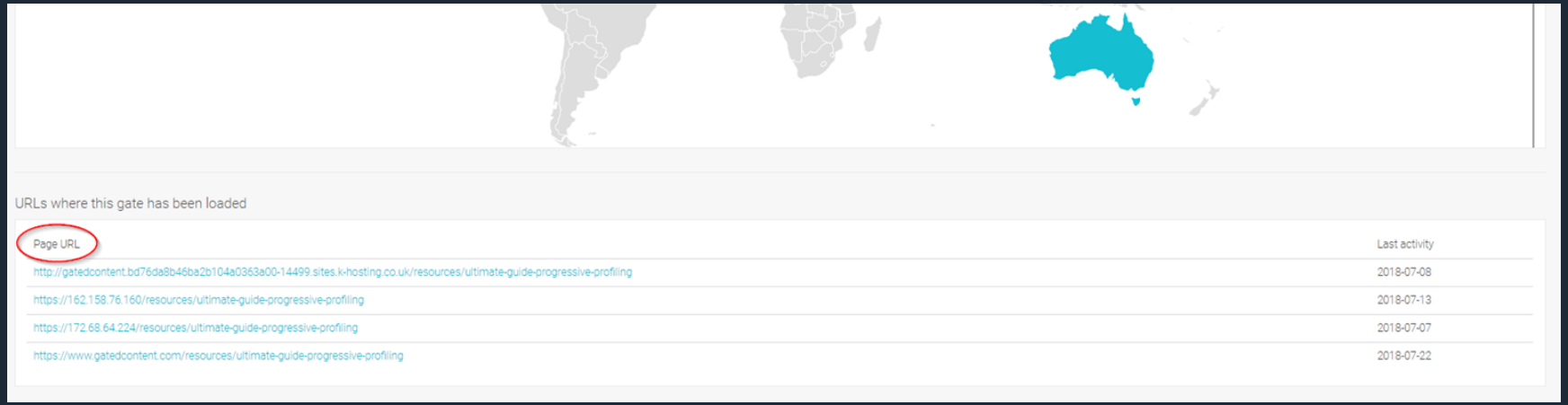
Then click the export button on the right hand side



Where are my Gates Deployed

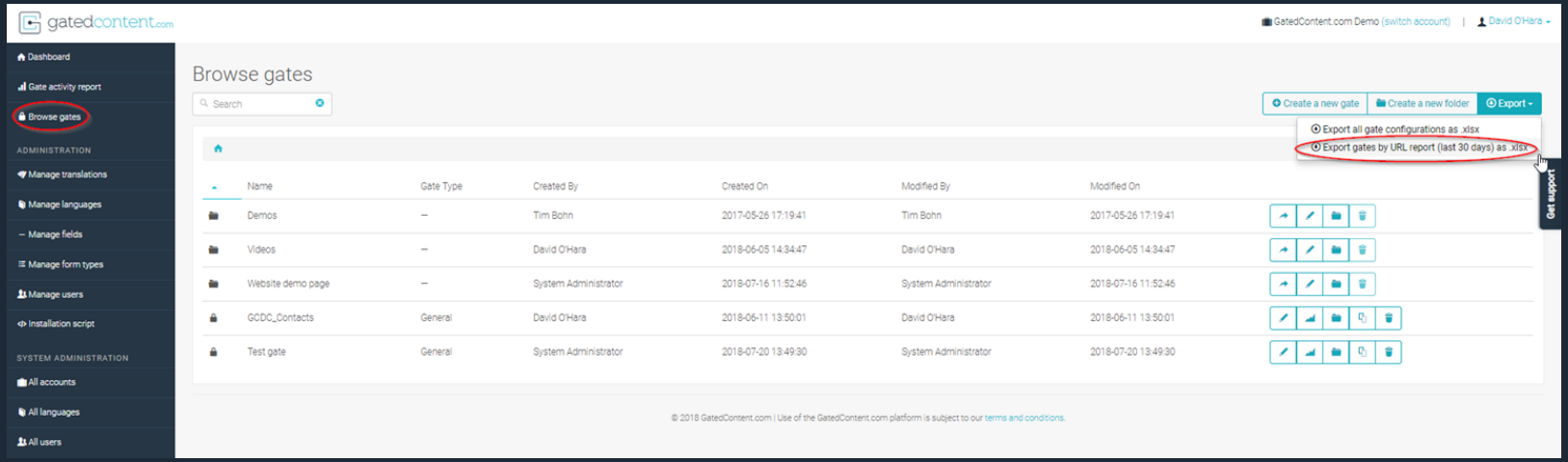


First you will need to go to the gate activity report found on the left hand side menu.
Then search and select the gate in question.
Scroll on down past the reporting and at the bottom of the page under the world map, you will find a list of URLs where this gate has been loaded.



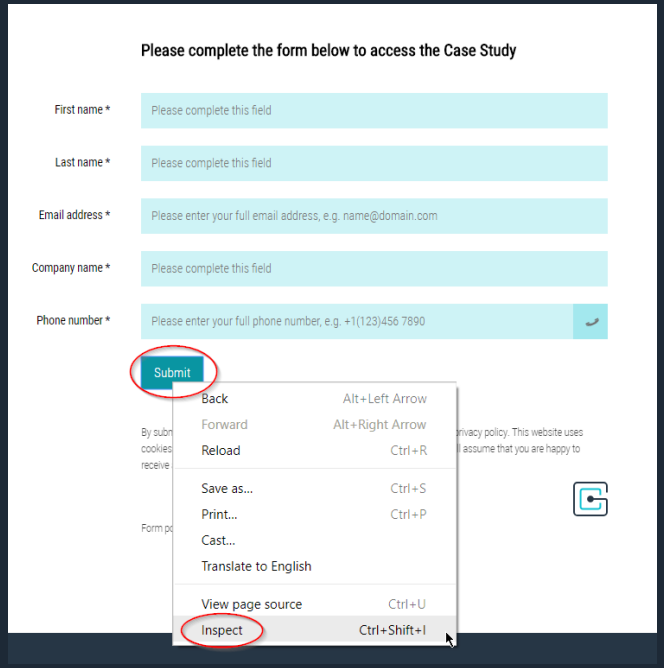
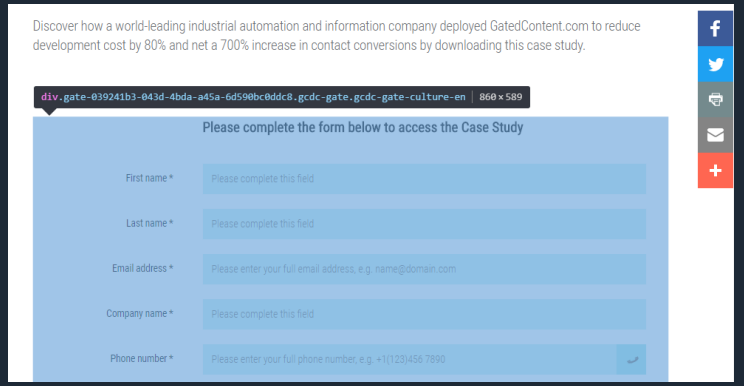
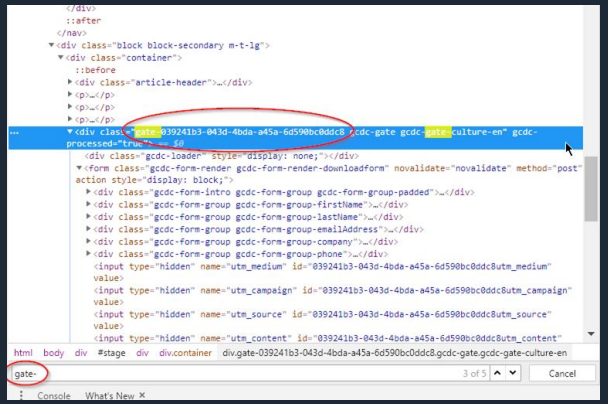
Exporting Gate Deployment Locations

gatedcontent.com



	A	B	C	J	K	L	M
1	Gate ID	Gate Name	Form Type	Last Mod	URL	Date last active	
2	07bbd37f-ea5d-41c	Persona Worksheet Download	ProgressiveGatingForm	2018-07-16	http://gatedcontent.com/demo	2018-09-13	
3	48d10f14-e4fa-495	GCDC_Contacts	ContactForm	2018-06-11	http://gatedcontent.com/demo	2018-08-28	
4	6dcb6cdd-1154-46	Buyer Journey Infographic Dow	ProgressiveGatingForm	2018-07-16	http://gatedcontent.com/demo	2018-09-13	
5	98ea71d5-b820-49	Contact Form	ContactForm	2018-07-16	http://gatedcontent.com/demo	2018-09-13	
6	a10bab97-c67f-40c	GCDC_Contacts	ContactForm	2018-06-11	http://gatedcontent.com/demo	2018-08-28	
7	a338f7ce-0a71-474	Introductory guide	ProgressiveGatingForm	2018-07-16	http://gatedcontent.com/demo	2018-08-28	
8	a44fc774-e0a8-44b	Content Marketing Guide Downl	ProgressiveGatingForm	2018-08-28	http://gatedcontent.com/demo	2018-09-13	
9	e73f4527-ebb1-40b	Marketing Video	EmailOnlyGatingForm	2018-07-16	http://gatedcontent.com/demo	2018-08-28	
10							

Identifying a gate on a webpage

gatedcontent.com

To find a gate ID right click the submit button and click inspect to open the console.