

## Welcome to GatedContent.com

Platform Overview

#### What is 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



#### Fundamentals

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## The Anatomy of a Gate

#### Understanding Gates & Forms

## What is a gate?



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.



#### 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**



#### **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:

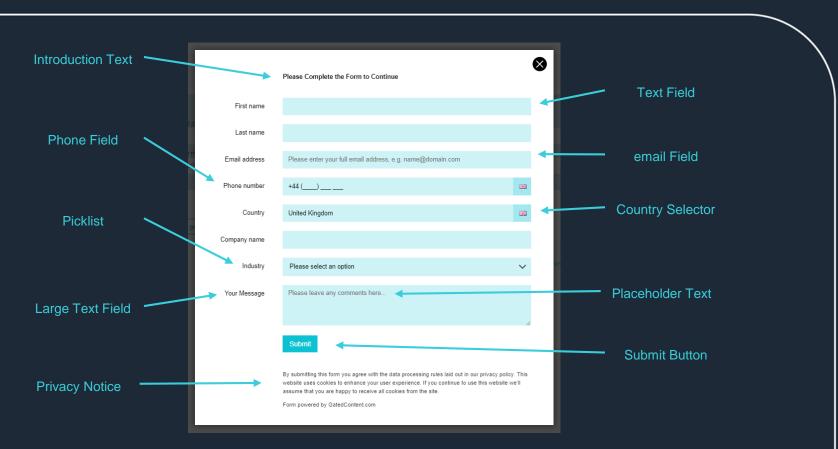
- The user already filled out the form previously
- The user completed a similar form previously
- The user is already known to a sufficient level in the marketing tech stack
- The content is deemed as lower value and we don't wish to deploy a full gate, but still wish to capture a form submission in 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







### 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.

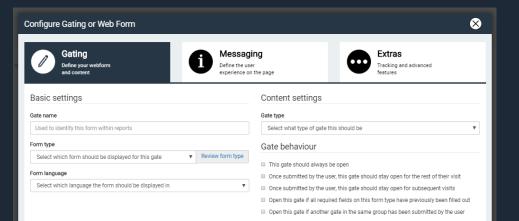
**Note:** Each instance of GatedContent.com has a slightly different editor. This is because each instance of GatedContent.com is customized to the integration and feature requirements of the appropriate company.

■ gatedcontent.com								Illi GatedContent.com Demo (switch account)   L David O'Hara -
Dashboard     di Gate activity report     Browse gates     ADMINISTRATION	Brow Q Sear	vse gates					• Create a	new gate
	-	Name Demos	Gate Type	Created By Tim Bohn	Created On 2017-05-26 17:19:41	Modified By Tim Bohn	Modified On 2017-05-26 17:19:41	Un automatica de la companya de la compa
- Manage fields III Manage form types	-	Videos Website demo page	-	David O'Hara System Administrator	2018-06-05 14:34:47 2018-07-16 11:52:46	David O'Hara System Administrator	2018-06-05 14:34:47 2018-07-16 11:52:46	
Φ Installation script SYSTEM ADMINISTRATION	•	GCDC_Contacts	General	David O'Hara	2018-06-11 13:50:01	David O'Hara	2018-06-11 13:50:01	
M All accounts				© 2018 G	atedContent.com   Use of the GatedContent.com	platform is subject to our terms and conditions.		
Lt All users								

#### **Basic Settings**



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.



Save Gate

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 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



Contact form			•	Review form type
Field	Display	Туре	Mandatory	Progressive
Country (country)	*	Country	~	
First name (firstName)	~	Text	~	
Last name (lastName)	~	Text	~	
Email address (emailAddress)	~	Email	~	
Phone number (phone)		Phone	~	
Industry (industry)		Picklist		
Your message (message)	~	Textbox	~	Has additional rules
Custom fields	~	CustomFields		
I would like to receive regul. (optin)	. 🗸	Checkbox		Has additional rules
Your data will be stored. (privacyNotice)	. 🗸	CustomContent	t	Has additional rules

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



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.



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:

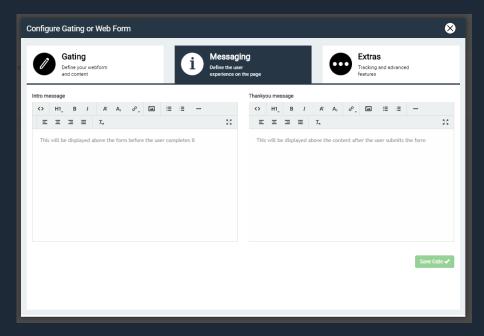
- This gate should always be open
- Once submitted by the user, this gate should stay open for the rest of their visit
- Once submitted by the user, this gate should stay open for subsequent visits
- Open this gate if all required fields on this form type have previously been filled out
- Open this gate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

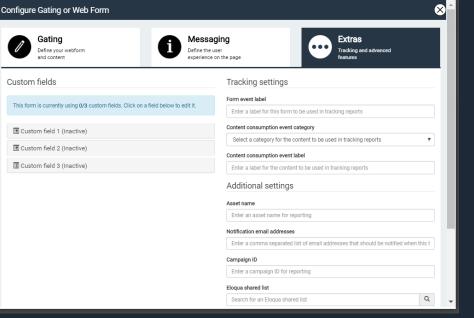
Thank you message - The HTML content displayed immediately after a form has been completed. Typically accompanied with the delivery of the content itself e.g. the embedded video or download button. A rich text editor is provided to manage the content. **Gate open message** - The HTML content displayed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



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.

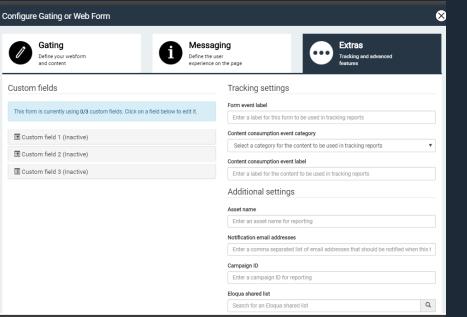


Custom fields - Some instances will have the ability to add additional fields to a form on a gate by gate basis. Extra fields are usually added at the bottom of the form. Click on the wording "Custom field" to open the rolldown, then the follow options are available: Field type - the type of form input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



## Installing the GatedContent.com Script

Enable GatedContent.com on your webpages

#### Find the Installation Script



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

■ gatedcontent.com				GatedContent.com (switch account)        Davi	id O'Hara 🗸
Dashboard     Idate activity report     ADMINISTRATION	Dashboard Gate activity: Jan 19, 2018 - Feb 19, 2018			🗂 Jan 19, 2018 - Feb 18, 201	8
Amange gates Manage translations Manage translations Manage tanguages Manage users It Manage users It installation script SYSTEM ADMINISTRATION All accounts	Gate loads	Gate starts	M	Gate submissions	
€ Al languages	Most submitted gates GDPR-Video GatingContent-Guide Contact Form The Ultimate Guide to Progressive Profiling Forms	22 10 2 1	Most submitted form types DownloadForm ContactForm		33
		© 2018 GatedContent.com   Use of the GatedContent.c	om platform is subject to our terms and conditions.		

#### Copy the Installation Script



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.

■ gatedcontent.com	
A Dashboard	Installation parint for CatadContent com
.II Gate activity report	Installation script for GatedContent.com
🐣 Browse gates	Place this code on every page of your website. This will allow users to be tracked and GatedContent.com forms to render. This code is unique to GatedContent.com.
ADMINISTRATION	<script> (function(g,a,t,e,d,c,o){ if (function(g,a,t,e,d,c,o){</th></tr><tr><th>Wanage translations</th><th><pre>if (lg[d]) {g.GatedContentObject=d; g[d]=g[d] [function(){(g[d].eg[d].e][ ].push(arguments)}; c=a.createElement(t).o=a.getElementSWTagName(t)[0];</pre></th></tr><tr><th>🎙 Manage languages</th><th><pre>c-acteacettement(c),o-actectementsbytagname(c)[0], c.async=1;c.src=e;o.parentMode.insertBefore(c, o)} })(window, document, 'script', 'https://staging-app.gatedcontent.com/scripts/86440403/app.js', 'gcdc');</pre></th></tr><tr><th>🖌 Manage styles</th><th><pre>gcdc('loadGates'); </script>
– Manage fields	
Ⅲ Manage form types	
🎗 Manage users	

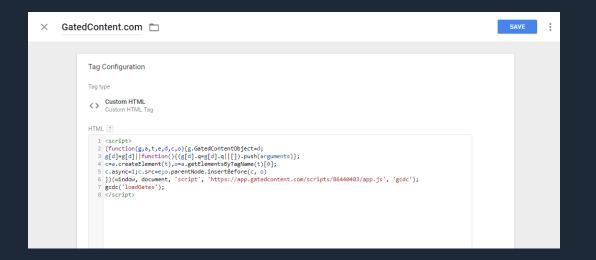
#### Installing the Script



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.

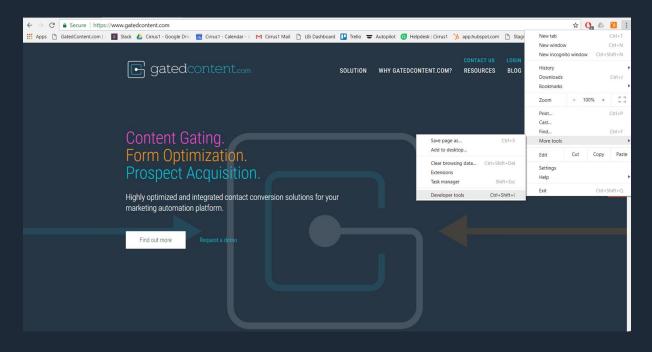
Ensure you have added this script to every web page that you will be deploying gates to.



## 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



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:

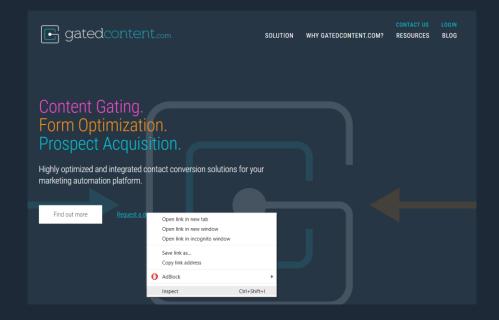
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🛇 top	▼ Filter		Default levels	•	24 item	s hidde	en by filters	\$
> gcdc								
Uncaught Refere at <anonymous< p=""></anonymous<>	_	not defined					<u>VM327:1</u>	
>								

## 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



•	R	61	Elements	Console	Sources	Network	Performance	Memory	Application
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							e="novalidate		'post"
		act	tion style=	"display:	<pre>block;"&gt;</pre>				
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-	ant	adcont	ent com				30 of 51		Cancel

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.



## Deploying a Gate

Adding Modals & Embedded Gates to your Website

#### Gate Embed Codes



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.

lit gate	View gate activity 🔒 Browse gates
CONTACT US (EN) To open this gate within a modal from a link, copy and paste the following URL int #gate-e7e29e26-096f-42b9-8c7d-5190cf67c7b0	) the 'href' attribute of the link:
To embed this gate <b>within a webpage</b> , copy and paste the HTML code below on the <div class="gate-e7e29e26-096f-42b9-8c7d-5190cf67c7b0"></div>	e page where you want the gate to appear:
Edit this gate	
Preview gate     View gate activity     Browse gates	

#### 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.

E gi		GatedContent.com is the number one content gating solution for enterprise Marketing Automation Platforms. For a demo or to find out more, please fill out the form below.	8	OT US	
	First name *	Please complete this field			
	Last name *	Please complete this field			
Conte	Email address *	Please enter your full email address, e.g. name@domain.com			
Prosp	Company name *	Please complete this field			
Highly optin	Country *	United Kingdom	583		
marketing a	Phone number *	+44 ()	543		
Find out r		Submit			
		By submitting this form you agree with the data processing rules laid out in our privacy policy. This websit cookies to enhance your use experience. If you continue to use this website well assume that you are har receive all cookies from the site.			
		Form powered by GatedContent.com	E		
			1		

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: <a href="#gate-98ea71d5-b820-49dc-acdb-167575509999"> Download our latest guide</a>

#### 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.

E, di			8	IRCES	
		GatedContent.com is the number one content gating solution for enterprise Marketing Automation Platforms.			
		For a demo or to find out more, please fill out the form below.			
	First name *	Please complete this field			
	Last name *	Please complete this field			
Form	Email address *	Please enter your full email address, e.g. name@domain.com			
Prosp	Company name *	Please complete this field			
Highly optin marketing a	Country *	United Kingdom	583		
	Phone number *	+44 ()	SIS	1	
Find out r		Submit			
		By submitting this form you agree with the data processing rules laid out in our privacy policy. This webs cookies to enhance your user experience. If you continue to use this website we'll assume that you are ha receive all cookies from the site.			
		Form powered by GatedContent.com	E		

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.

Case Study		
	utomation and information company deployed GatedContent.com to reduce development co onversions by downloading this case study.	ost by
•	Please complete the form below to access the Case Study	
First name *	Please complete this field	
Last name *	Please complete this field	
Email address *	Please enter your full email address, e.g. name@domain.com	
Company name *	Please complete this field	
Phone number *	Please enter your full phone number, e.g. +1(123)456 7890	
	Submit	
	By submitting this form you agree with the data processing rules laid out in our privacy policy. This website uses cookes to entrance your user expension. If you continue to use this website well assume that you are happy to receive all cookes from the site.	
	Form powered by GatedContent.com	

Here is an example embed code for inline gates: <div class="gate-98ea71d5-b820-49dc-acdb-167575509999"></div>



## Analytics & Reporting

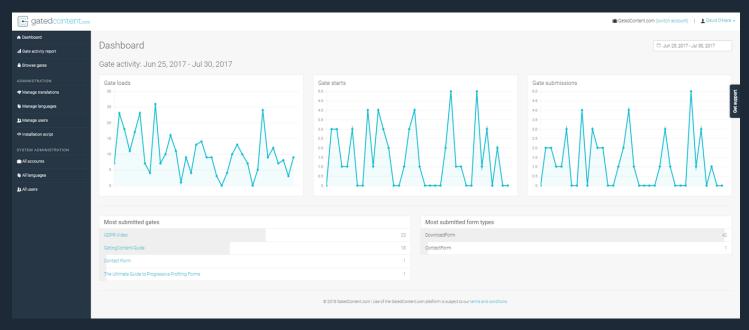
Understanding Gate Activity Reports

#### 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							atedContent.com (switch account)   1 David O'Hara -
♠ Dashboard							
al Gate activity report	Gate activity report						Nov 12, 2018 - Dec 12, 2018
🚔 Browse gates	All activity for date range: Nov 12, 2018 - Dec 12, 2018						
ADMINISTRATION	Q. Search O						Print report   Export report
Manage translations	Gate Name	Loads	Starts	Submissions	Conversion Rate	Abandonment Rate	Consumptions
Manage languages	GCDC_ CS	6	0	5 upmissions	N/A	N/A	0 S
' Manage styles	GatedContent.com Introductory Video Form	0	1	0	0%	100%	11
Manage fields	6000,0S	5	1	1	100%	0%	1
: Manage form types	Contact Form	53	28	23	82.1%	17.9%	0
Manage users	GDPR-Video	6	0	0	N/A	N/A	0
Installation script	GatingContent-Guide	9	2	2	100%	0%	2
rinacialitation acripti	GCDC_BusinessCase	5	0	0	N/A	N/A	0
STEM ADMINISTRATION	GCD0CS	6	1	1	100%	0%	1
All accounts	The Utimate Guide to Progressive Profiling Forms	13	1	1	100%	0%	1
All languages							
ts All users	Gate submissions by location						





#### 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



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

🕞 gatedcontent.com	
♠ Dashboard	Dealth courd
Gate activity report	Dashboard
🔒 Browse gates	Gate activity: Jun 24, 2018 - Jul 24, 2018
ADMINISTRATION	Gate loads
Manage translations	50
🕅 Manage languages	45

#### Then click the export button on the right hand side

#### The .xls download contains:

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

Gate activity report						🗎 Jun 24, 2018 - Jul 24, 2018
All activity for date range: Jun 24, 2018 - Jul 24, 2018						
Q. Search						Print report O Export report
Gate Name	Loads	Starts	Submissions	Conversion Rate	Abandonment Rate	Consumptions
The Ultimate Guide to Content Gating - (High)	3	0	0	N/A	N/A	0
Contact Form	29	1	0	0%	100%	0

#### 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.



#### URLs where this gate has been loaded

Page URL	Last activity
http://gatedcontent.bd76da8b46ba2b104a0363a00-14499.sites.k-hosting.co.uk/resources/ultimate-guide-progressive-profiling	2018-07-08
https://162.158.76.160/resources/ultimate-guide-progressive-profiling	2018-07-13
https://172.68.64.224/resources/ultimate-guide-progressive-profiling	2018-07-07
https://www.gatedcontent.com/resources/ultimate-guide-progressive-profiling	2018-07-22

# 



■ gatedcontent.com									GatedContent.com Demo (switch accounter)	nt)   🛓 David O'Hara 🗸
A Dashboard	Drout	una giatan								
al Gate activity report		vse gates								
Browse gates	Q Searc	ch O							Create a new gate     Create a new     Export all gate configuration	
ADMINISTRATION	•								Export an gate comparation     Export gates by URL report (	
Manage translations		Name	Gate Type	Created By		Created On	Modified By	Modified On		Loda
🕅 Manage languages	-	Demos	-	Tim Bohn		2017-05-26 17:19:41	Tim Bohn	2017-05-26 17:19:41		Get au
– Manage fields		Videos	-	David O'Hara		2018-06-05 14:34:47	David O'Hara	2018-06-05 14:34:47		
III Manage form types		Website demo page	_	System Administrator		2018-07-16 11:52:46	System Administrator	2018-07-16 11:52:46		
13 Manage users	-	GCDC_Contacts		David O'Hara		2018-06-11 13:50:01	David O'Hara			
Installation script	-	GCDC_Contacts	General	David U Hara			David O'Hara	2018-06-11 13:50:01		
SYSTEM ADMINISTRATION	-	Test gate	General	System Administrator		2018-07-20 13:49:30	System Administrator	2018-07-20 13:49:30	A = 6	
All accounts										
All languages					© 2018 G	atedContent.com   Use of the GatedC	iontent.com platform is subject to our terms and co	anditions.		
1: All users										
			R		<u>_</u>			K		М

	A	В	С	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-e0a8-44t	Content Marketing Guide Downl	ProgressiveGatingForm	2018-08-28	http://gatedcontent.com/demo	2018-09-13	
9	e73f4527-ebb1-40t	Marketing Video	EmailOnlyGatingForm	2018-07-16	http://gatedcontent.com/demo	2018-08-28	
10							

## Identifying a gate on a webpage



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

	Please	complete the form b	elow to access the	Case Study				
First name *	Please	complete this field						
Last name *	Please	complete this field						
Email address *	Please	enter your full email address	, e.g. name@domain.com					
Company name *	Please	Please complete this field						
Phone number *	Please	enter your full phone number	r, e.g. +1(123)456 7890	J				
	Submi							
		Back	Alt+Left Arrow					
	By subn	Forward	Alt+Right Arrow	rivacy policy. This website uses				
	cookies receive	Reload	Ctrl+R	I assume that you are happy to				
		Save as	Ctrl+S					
		Print	Ctrl+P					
	Form po	Cast						
		Translate to English						
		View page source	Ctrl+U					
	(	Inspect	Ctrl+Shift+I	k				

