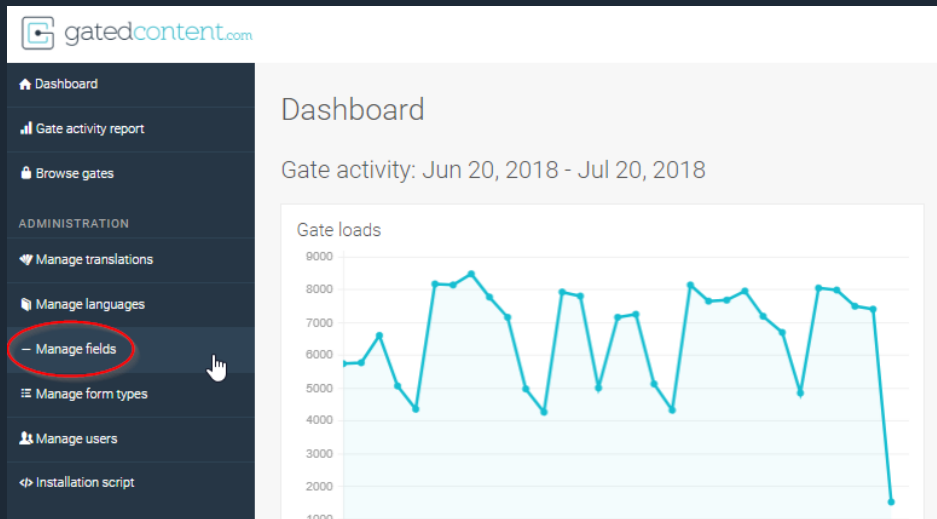


Managing Fields

How to Create & Customise Form Fields

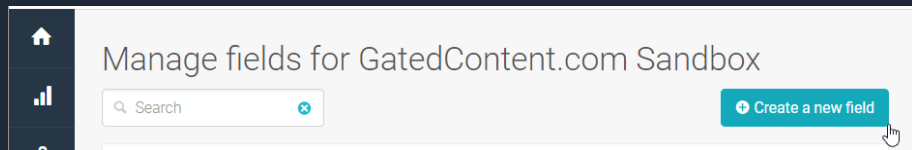
Manage Fields



The manage fields tab can be found on the left hand side menu and once opened will display all the fields associated with your account.

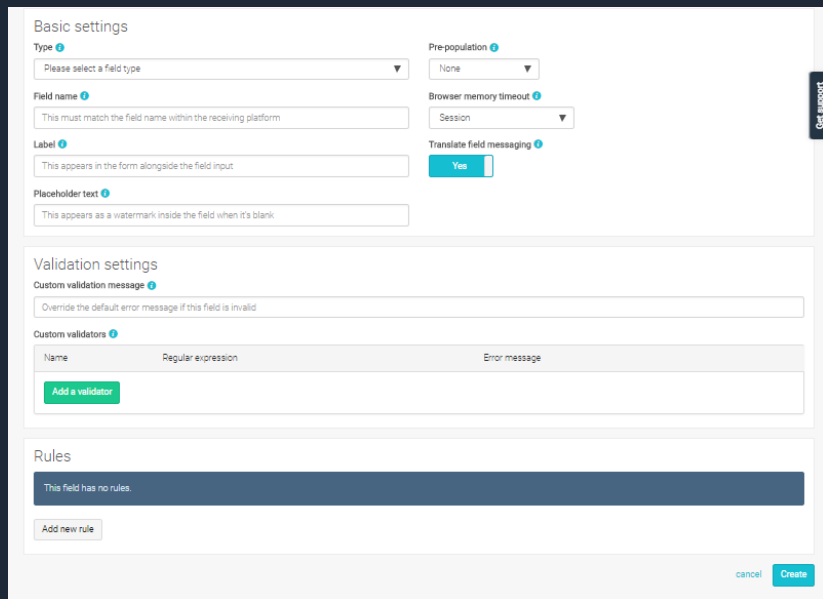
The manage fields area is where you administer the fields that will be available to be used in form types, and fields that will be added to the forms as hidden fields. Field rules are managed here too, which is where dynamic field behaviours are administered.

Create a New Field



To create a new field click the Create a new field button on the top right hand side, this will load the field editor.

Type - The field type determines what input will be displayed to the user, and the type of data it is able to accept. It is important that the corresponding field on the receiving field is of an appropriate type. For example, a large text field requires a multi-line input with a high character limit on the receiving form.



The field editor interface is divided into several sections:

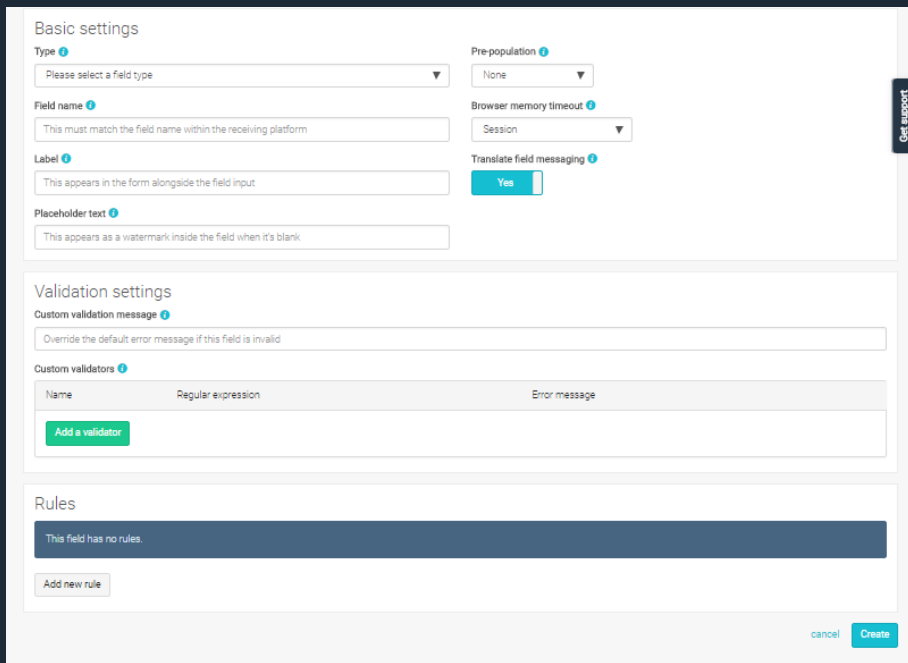
- Basic settings:**
 - Type:** A dropdown menu with the placeholder text "Please select a field type".
 - Pre-population:** A dropdown menu with "None" selected.
 - Field name:** A text input field with the placeholder text "This must match the field name within the receiving platform".
 - Label:** A text input field with the placeholder text "This appears in the form alongside the field input".
 - Placeholder text:** A text input field with the placeholder text "This appears as a watermark inside the field when it's blank".
 - Browser memory timeout:** A dropdown menu with "Session" selected.
 - Translate field messaging:** A toggle switch currently set to "Yes".
- Validation settings:**
 - Custom validation message:** A text input field with the placeholder text "Override the default error message if this field is invalid".
 - Custom validators:** A table with columns "Name", "Regular expression", and "Error message". Below the table is a green button labeled "Add a validator".
- Rules:**
 - A blue bar with the text "This field has no rules".
 - A button labeled "Add new rule".

At the bottom right, there are "cancel" and "Create" buttons.

Field options include:

- Simple Text
- Large Text
- Check Box
- Email Address
- Phone Number
- Country Selector
- Picklist
- Custom Content
- Hidden Field

Basic Settings



The screenshot shows the 'Basic settings' form for a field in GatedContent. The form is divided into three main sections: Basic settings, Validation settings, and Rules. The Basic settings section includes fields for Type, Field name, Label, Placeholder text, Pre-population, Browser memory timeout, and Translate field messaging. The Validation settings section includes a Custom validation message and a table for Custom validators. The Rules section includes a message indicating no rules are currently set and an option to add a new rule. A 'Get support' button is visible on the right side of the form.

Basic settings

Type [?]

Pre-population [?]

Field name [?]

Browser memory timeout [?]

Label [?]

Translate field messaging [?] ☒

Placeholder text [?]

Validation settings

Custom validation message [?]

Custom validators [?]

Name	Regular expression	Error message
Add a validator		

Rules

[Add new rule](#)

[cancel](#) [Create](#)

Type - The field type determines what input will be displayed to the user, and the type of data it is able to accept.

Field name - Maps the field to your marketing automation platform and must match exactly

Label - This is the text that will appear to the user on the form alongside or above the field input (depending on your account styling) e.g. "Please Select a Country"
This can be translated into other languages using the translation management area.

Placeholder text - Appears as a light-coloured watermark inside the input area of the field when it's blank.

Pre-population - Fields can be pre-populated with data from various sources whilst the form is loading. This dropdown allows you to select the input for any pre-population required.

Basic Settings Continued...

Basic settings

Type ⓘ
Please select a field type ▼

Pre-population ⓘ
None ▼

Field name ⓘ
This must match the field name within the receiving platform

Browser memory timeout ⓘ
Session ▼

Label ⓘ
This appears in the form alongside the field input

Yes

Translate field messaging ⓘ

Placeholder text ⓘ
This appears as a watermark inside the field when it's blank

Validation settings

Custom validation message ⓘ
Override the default error message if this field is invalid

Custom validators ⓘ

Name	Regular expression	Error message
<div>Add a validator</div>		

Rules

This field has no rules.

Add new rule

cancel

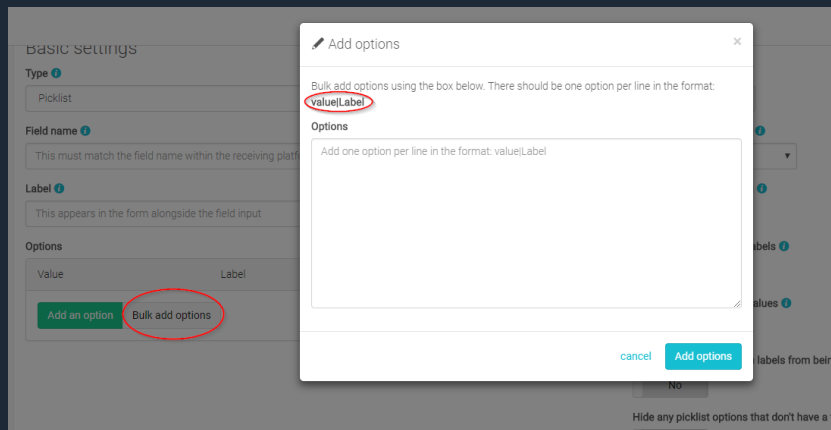
Create

Browser memory timeout - This determines how long a field will remember it's value for after pre-populating or completion and submission by the user.


In addition to this, some pre-pop sources (such as MAP contact records or query string values) are cached when retrieved. This can be controlled from the main account settings by your administrator.

Translate field messaging - Determines whether the field messaging (label, placeholder and validation messaging) should be made available for translation. You can find out more about languages and translations here.


Specific Field Type Settings




Basic settings

Type 

Picklist

Field name 

This must match the field name within the receiving platform

Label 

This appears in the form alongside the field input

Options

Value	Label
-------	-------

[Add an option](#) [Bulk add options](#)

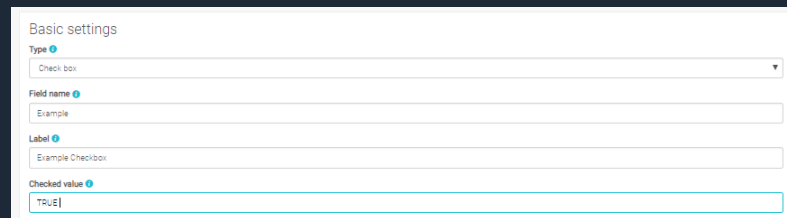
Add options

Bulk add options using the box below. There should be one option per line in the format: **value|label**


Options

Add one option per line in the format: value|label


[cancel](#) [Add options](#)




Basic settings

Type 


Checkbox

Field name 

Example

Label 

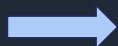
Example Checkbox

Checked value 

TRUE

When using **checkboxes** you must provide a **checked value** that will be returned to the marketing automation platform.

When using **picklists**, the **labels** to be displayed to the user and the **values** to be returned to the marketing automation platform must be provided.



Top Tip - You can bulk add picklist options by submitting a list with one option per line in the format:

Value|Label


Value|Label

Value|Label


Custom Content

Edit field privacyNotice

Basic settings

Type 


Custom content ▼

Content name 

privacyNotice

Content

<p>Your data will be stored and processed in accordance with our privacy policy.</p>

Translate content 

Yes ☐

Content Name - This will not be displayed to users but is only used internally to show gate editors where the content will appear on forms, and also to identify the content for translation.

Content - This is where you can add HTML to a form type which is not related to a field e.g. disclaimer text or subheading.

Validation Settings

Custom Validation message - All fields use default validation messaging specific to the field type when the user attempts to submit the form with invalid fields. This messaging can be overridden for this field below.

Custom Validators - Custom validation rules can be added to this field below. Each validation rule must take the form of a valid regular expression.

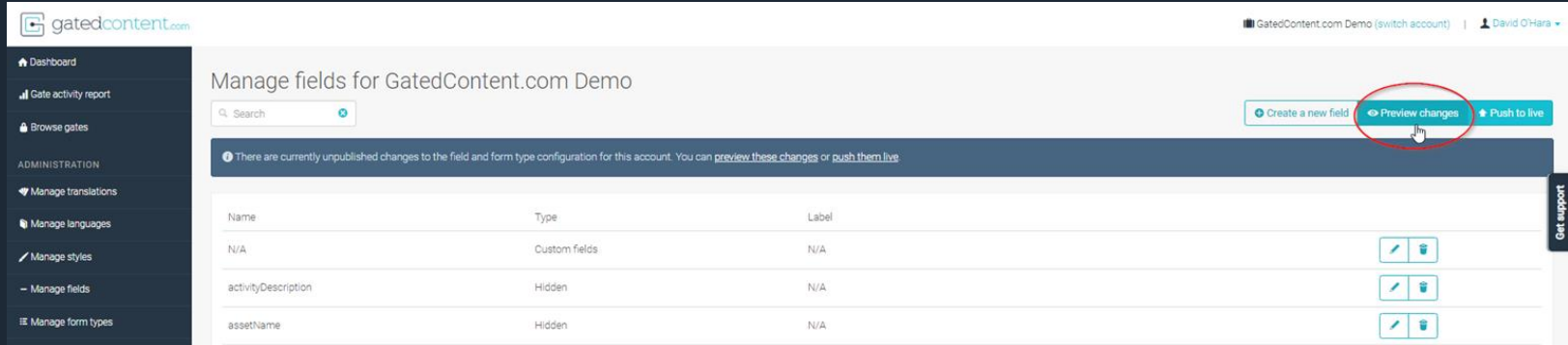
Validation settings

Custom validation message







Custom validators

Name	Regular expression	Error message
RemoveSpecialCharacters	<input type="text" value="^[^\\ \\ @ # & / % < > ?]+\$"/>	<input type="text" value="Remove special characters"/>

Preview Mode



The screenshot shows the 'Manage fields for GatedContent.com Demo' page. At the top right, there are three buttons: 'Create a new field', 'Preview changes' (circled in red), and 'Push to live'. Below these buttons, a notification bar states: 'There are currently unpublished changes to the field and form type configuration for this account. You can [preview these changes](#) or [push them live](#).' Below the notification is a table with three columns: Name, Type, and Label. The table contains three rows of data. Each row has edit and delete icons on the right.

Name	Type	Label	
N/A	Custom fields	N/A	 
activityDescription	Hidden	N/A	 
assetName	Hidden	N/A	 

By clicking preview mode you can see changes within the admin area.
This option is only available when there are changes pending on the platform.

Push to Live



Manage fields for GatedContent.com Sandbox

Search



Create a new field

Preview changes

Push to live

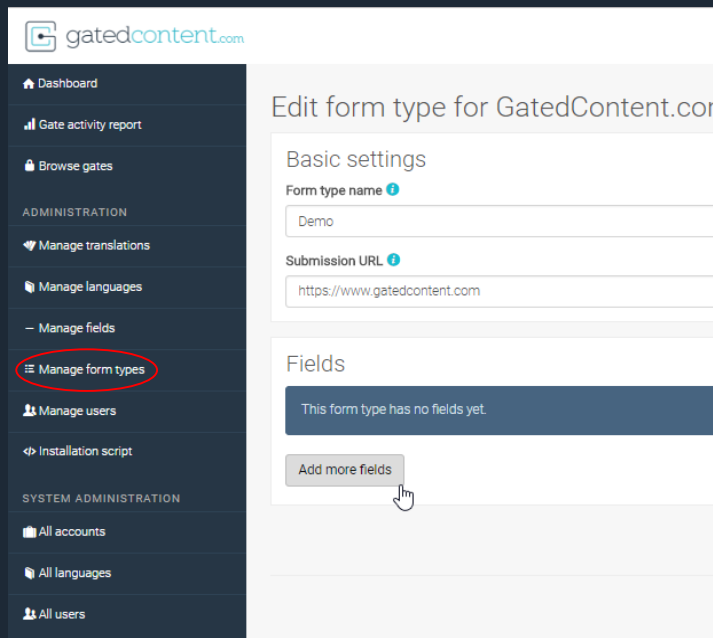
There are currently unpublished changes to the field and form type configuration for this account. You can [preview these changes](#) or [push them live](#).

Once you have created or edited fields you will need to push the changes live before you start seeing them on gates or in the form type editor.

Managing Form Types

How to Create & Customise Form Fields

Manage Form Types



Form Types are essentially templates for forms.

The Form Type defines which fields are used in a Form.

This includes:

- Which fields display to the user
- What order they appear in
- What their validation status is
- If there is progressive profiling
- If gate editors can switch them on and off on each gate

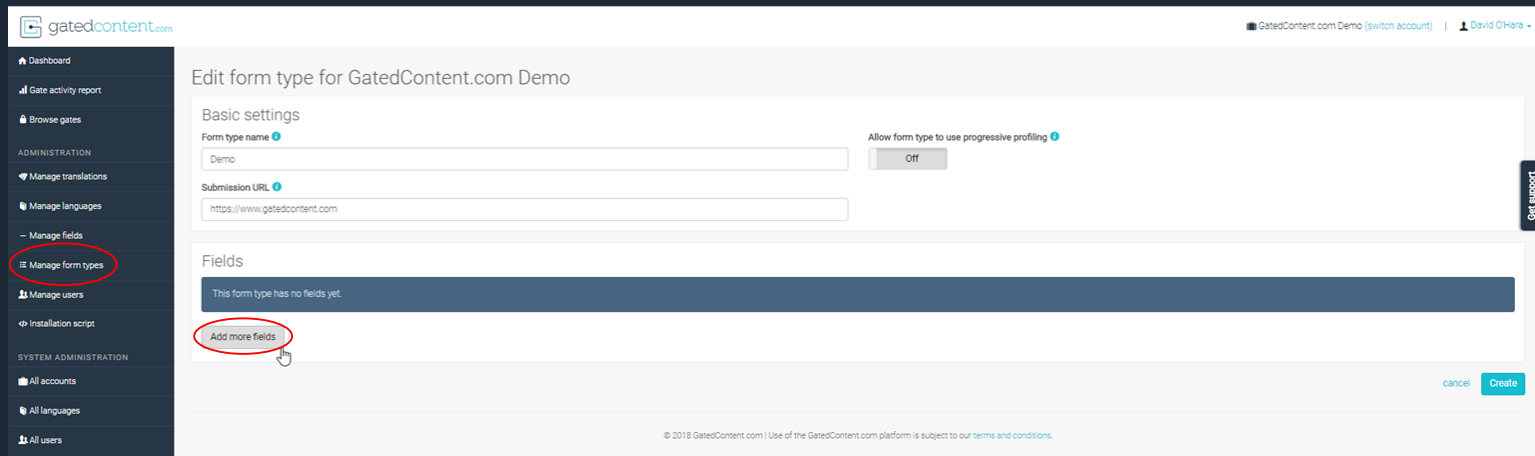
Click on Manage Form Types in the main menu

Creating a New Form Type

To create a new form type, click Create a new form type

Next you will need to choose a Submission URL; this is where the form data will be posted to on submission and would normally be a receiving form within a third party system such as Eloqua or Marketo.

Then click Add more fields



gatedcontent.com

GatedContent.com Demo (switch account) | David O'Hara

Dashboard

Gate activity report

Browse gates

ADMINISTRATION

Manage translations

Manage languages

Manage fields

Manage form types

Manage users

Installation script

SYSTEM ADMINISTRATION

All accounts

All languages

All users

Edit form type for GatedContent.com Demo

Basic settings

Form type name [?]

Demo

Allow form type to use progressive profiling [?]

Off

Submission URL [?]

https://www.gatedcontent.com

Fields

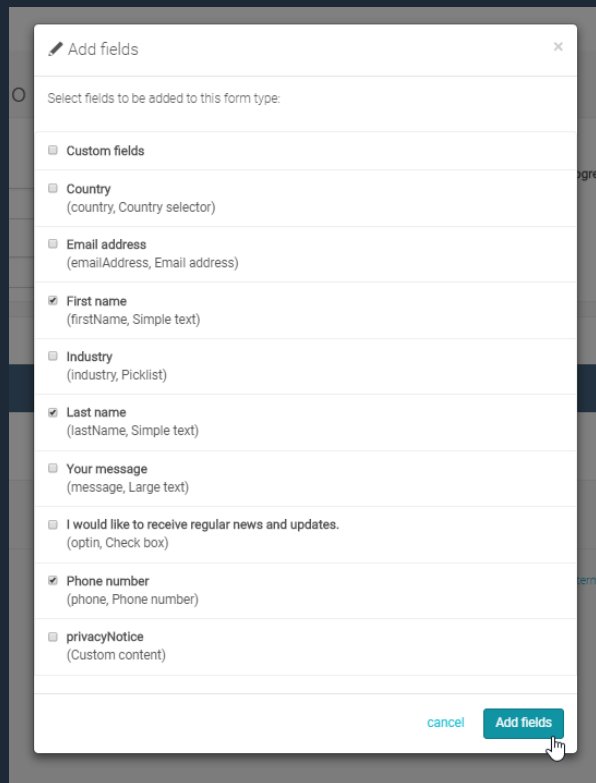
This form type has no fields yet.

Add more fields

cancel Create

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Adding Fields



✎ Add fields ✕

Select fields to be added to this form type:

- ☐ Custom fields
- ☐ Country
(country, Country selector)
- ☐ Email address
(emailAddress, Email address)
- ☒ First name
(firstName, Simple text)
- ☐ Industry
(industry, Picklist)
- ☒ Last name
(lastName, Simple text)
- ☐ Your message
(message, Large text)
- ☐ I would like to receive regular news and updates.
(optin, Check box)
- ☒ Phone number
(phone, Phone number)
- ☐ privacyNotice
(Custom content)

cancel Add fields

Select the fields in the order you want
them to appear on the form

Editing Fields

Edit form type for GatedContent.com Demo

Basic settings

Form type name [?](#)
Demo

Allow form type to use progressive profiling [?](#)
Off

Submission URL [?](#)
<https://www.gatedcontent.com>

Fields

First name *
Mandatory

Last name
Optional

Phone number
Phone mask will be applied to this field
Optional

Add more fields

To make a field mandatory or optional use the switch to the right of the field block.

Fields

First name *
Mandatory

Last name
Optional

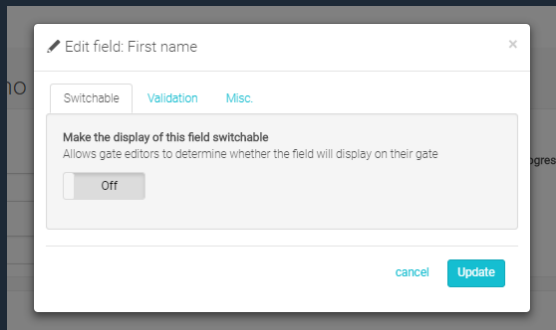
Phone number
Phone mask will be applied to this field
Optional

Add more fields

Click and drag to re-order

You can change order fields will appear on the form by clicking and dragging using the arrow button.

Advanced Settings



Edit field: First name

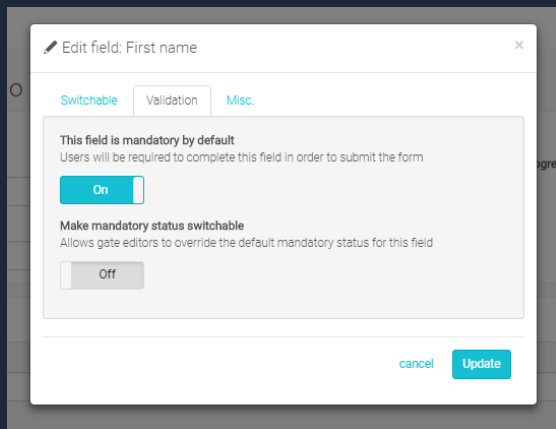
Switchable Validation Misc.

Make the display of this field switchable
Allows gate editors to determine whether the field will display on their gate

Off

cancel Update

By making the display of the fields switchable, a gate editor can choose whether or not the field will be displayed to the end user.



Edit field: First name

Switchable Validation Misc.

This field is mandatory by default
Users will be required to complete this field in order to submit the form

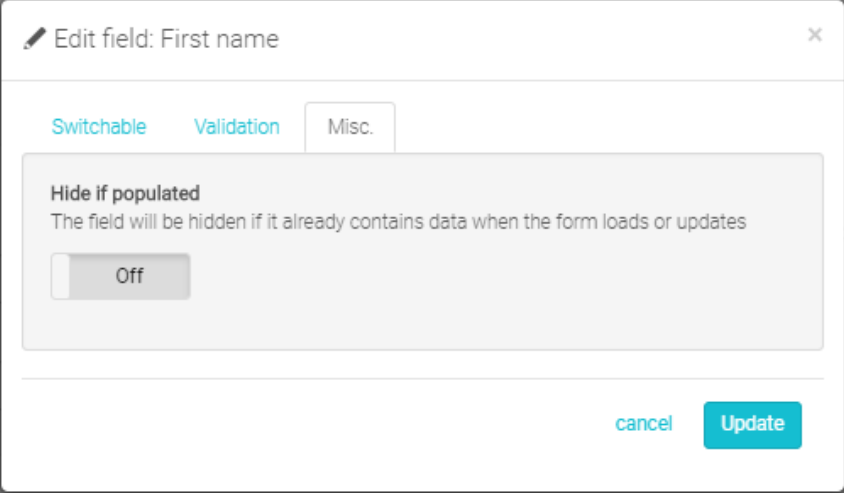
On

Make mandatory status switchable
Allows gate editors to override the default mandatory status for this field

Off

cancel Update

Under validation you also have the option of making mandatory status switchable, meaning a gate editor can choose whether or not it will be mandatory for the end user to complete the field.



The screenshot shows a dialog box titled "Edit field: First name" with a close button (X) in the top right corner. Below the title bar, there are three tabs: "Switchable", "Validation", and "Misc.". The "Misc." tab is currently selected. Inside the "Misc." tab, there is a section titled "Hide if populated" with a subtitle "The field will be hidden if it already contains data when the form loads or updates". Below this text is a toggle switch that is currently set to "Off". At the bottom of the dialog box, there are two buttons: "cancel" and "Update".

Under miscellaneous there is the option to hide the field if it already contains data, this can be helpful for increasing conversions but does not allow the user to update their contact record.

Progressive Profiling

Edit form type for GatedContent.com Demo

Basic settings

Form type name ⓘ

Progressive gating form

Key: ProgressiveGatingForm ⓘ

Submission URL ⓘ

https://staging-app.gatedcontent.com/debug

Allow form type to use progressive profiling ⓘ

Progressive

Maximum progressive steps allowed

3

To enable Progressive Profiling activate the slider and select the number of steps required in the top right of screen while editing the form type.

Then open advanced settings on the specific field and select the step number and mandatory status.

A form will show the fields in the same step number together. The lowest step number with empty pre-populated values will show. Fields not assigned a step number will always show.

Edit field: First name

Switchable Validation Progressive Misc.

Below you can define which progressive steps this field should appear on. The field will not appear on any missing steps, unless no steps are defined in which case the field will appear on all steps.

This field's state on any given step will override the base optional/mandatory status for this field.

Progressive steps

Step	State
2	Mandatory

Step 1 ▼ Please select ▼ Add step

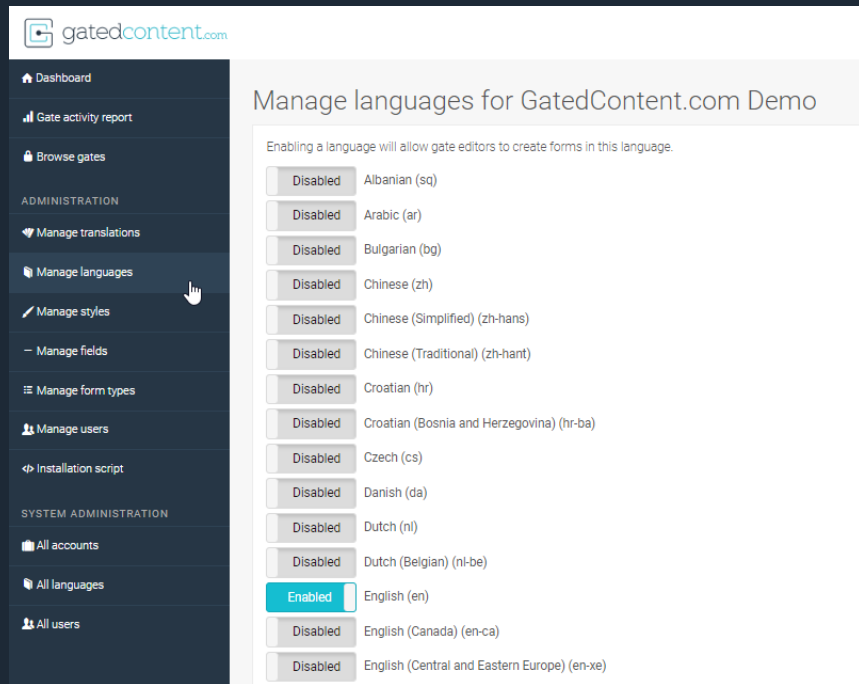
Please select
Visible
Mandatory

cancel Update

Translations & Languages

Importing, Exporting & Updating

Activating Languages



gatedcontent.com

Dashboard

Gate activity report

Browse gates

ADMINISTRATION

Manage translations

Manage languages

Manage styles

Manage fields

Manage form types

Manage users

Installation script

SYSTEM ADMINISTRATION

All accounts

All languages

All users

Manage languages for GatedContent.com Demo

Enabling a language will allow gate editors to create forms in this language.

Disabled	Albanian (sq)
Disabled	Arabic (ar)
Disabled	Bulgarian (bg)
Disabled	Chinese (zh)
Disabled	Chinese (Simplified) (zh-hans)
Disabled	Chinese (Traditional) (zh-hant)
Disabled	Croatian (hr)
Disabled	Croatian (Bosnia and Herzegovina) (hr-ba)
Disabled	Czech (cs)
Disabled	Danish (da)
Disabled	Dutch (nl)
Disabled	Dutch (Belgian) (nl-be)
Enabled	English (en)
Disabled	English (Canada) (en-ca)
Disabled	English (Central and Eastern Europe) (en-xe)

You can activate or deactivate entire languages and cultures in the **Manage Languages Area** simply by clicking the slider

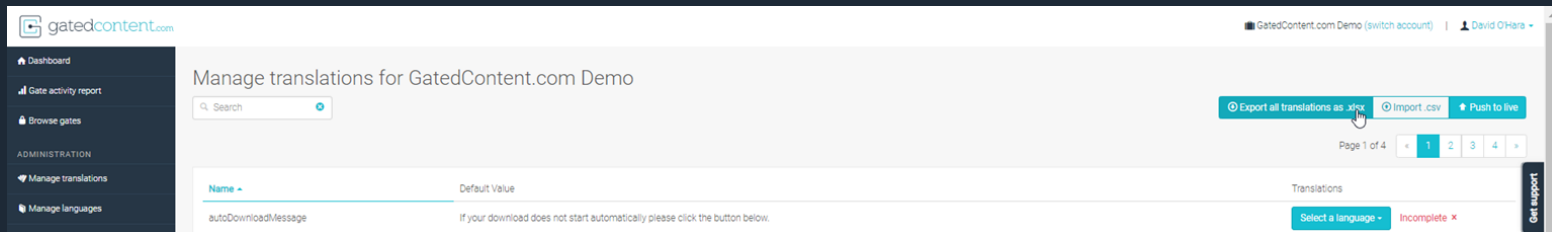
If the language you require does not appear in this list send a request to support@cirrus1.net

GatedContent.com supports **Languages and Cultures**.

For example Dutch (nl) would be considered the base language and Dutch Belgian (nl-be) is a culture.

In the event that a translation is not provided for a phrase in Dutch Belgian (culture) it will inherit the translation from Dutch (language).

Exporting Translations



Translations are split into the phrases that are used across the system.

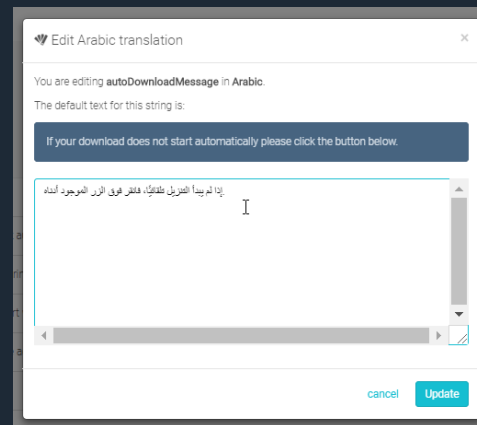
Phrases can be translated individually or in bulk.

To edit an individual phrase click on the drop down list next to the phrase, then select the language you want to edit.

The Default value is shown in the editor.

Note: The Default value is the original value for that phrase and is not the same as the English value. To override the English value, add or edit the phrase for English by selecting English from the drop down menu.

The Default value cannot be edited.



Exporting Translations

To edit translations in bulk, click the **Export Button** in the **Manage Translations** screen, this will download an excel sheet. The Excel contains a grid of translation phrases with languages/cultures across the columns and each phrase a row.

Important: Do not change any values in columns A, B and row 1.

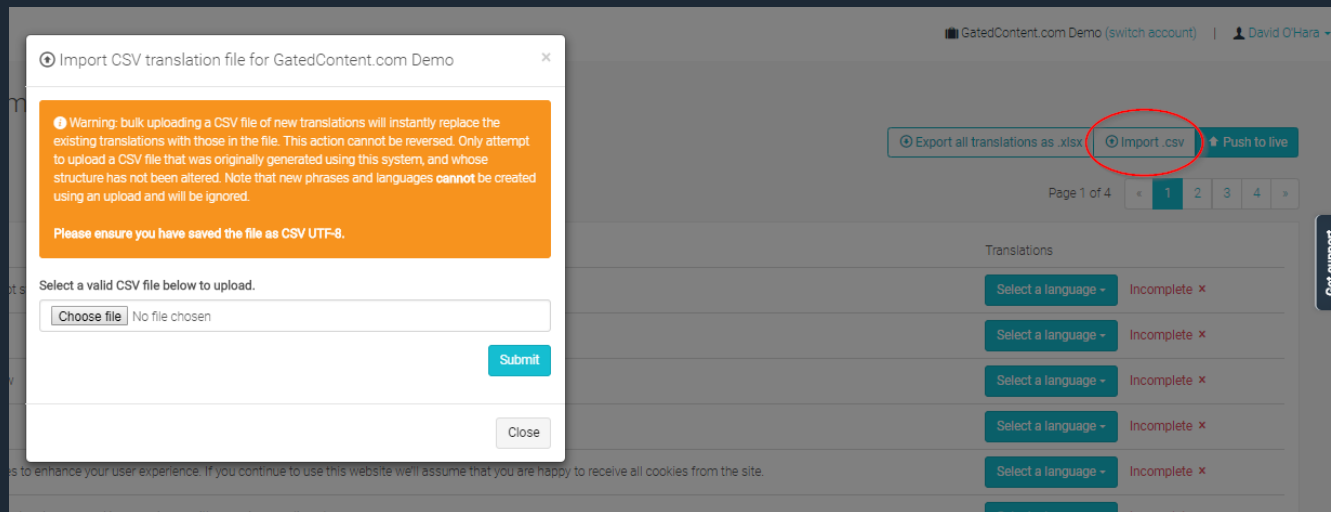
- Column A **Name** is the label for the phrases.
- Column B is the **Default Value**, if no translation has been specified for the currently active language, then this default value will be displayed.
- Everything right of Column B are translations organised by country and culture. For example, French Canadian would be represented as fr-ca.

For cultures, if translation cell is empty, it will cascade toward the root language and then to default.

- You can delete full rows and columns (except columns A, B and row 1) as the system will only update what **is in the** spreadsheet and will not delete translations where cells are blank. If you do want to delete a translation, you will need to do this within the main translation interface.

	A	B	C	D	E	F	G
1	Name	Default Value	sq	ar	bg	hr	hr-ba
2	autoDownloadMessage	If your download does not start automati	Nëse shkarkimi	إذا لم يبدأ التنزيل	Ако изтегляне	Ako preuzima	Ako preuzima
3	blockTextThinkDigitalMailingAdd	Mailing address - for print versio	Adresa e postë	العنوان البريدي -	Пощенски ад	Poštanska ad	Poštanska ad
4	blockTextThinkDigitalNote	¹Whilst every effort will be	Ndërsa do të	في الوقت الذي نسع	Въпреки че	ulako ćemo na	lako ćemo na
5	blockTextThinkDigitalTerms	By submitting this form you are agreeing	Me parangitien	بمجرد إرسال هذا	Като изпрати	Podnošenjem	Podnošenjem

Importing Translations



When ready to import the updated translation file, File>Save as> Drop down> **CSV UTF 8** (this is an essential step, failure to upload the correct file type could result in corrupted characters).

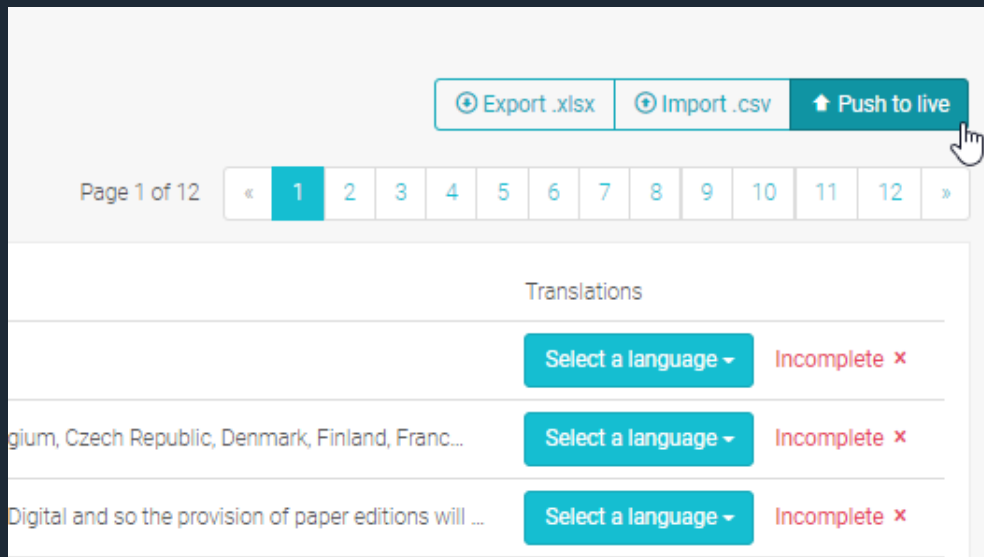
You can check updates by going to manage translations spot check phrases, defaults and languages.

If you have a staging instance of GatedContent.com, translation files can be test uploaded into there first.

Publishing Translations

Once translations are updated, they can be pushed into the live gates by clicking **Push to live**.

The push may take a few minutes to go live. Browser caches will need to be cleared to see the update.



The screenshot shows the GatedContent interface. At the top, there are three buttons: 'Export .xlsx', 'Import .csv', and 'Push to live'. A mouse cursor is hovering over the 'Push to live' button. Below the buttons is a pagination bar showing 'Page 1 of 12' and a series of numbered links from 1 to 12. The 'Translations' table below has three rows, each with a 'Select a language' dropdown menu and an 'Incomplete' status with a red 'x' icon.

Translations	
	Select a language ▾ Incomplete ✕
gium, Czech Republic, Denmark, Finland, Franc...	Select a language ▾ Incomplete ✕
Digital and so the provision of paper editions will ...	Select a language ▾ Incomplete ✕

Field Rule Engine

Customising Field Behaviour

Field Rules

Field rules are a powerful tool to orchestrate dynamic changes in form behaviour or collate data within form fields

Rules are attached to fields and can affect the values or behaviour of that field. Criteria for the rule can utilise values from other fields in a form, from data contained within the gate or from information gathered from the browser.

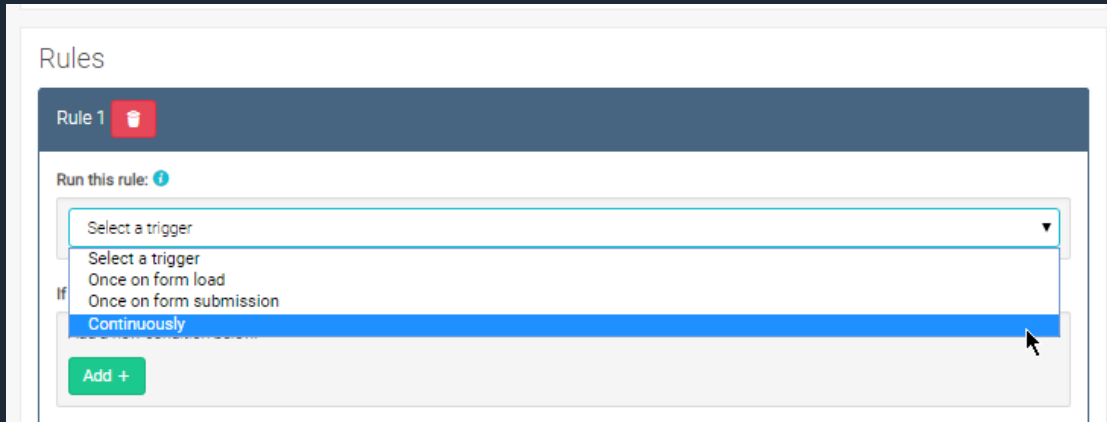
Multiple rules can be applied to a field.

Rules can utilise different triggers which will determine when they are applied.

Triggers

Select a field you want to add a rule to and click add new rule.

Firstly, you will need to select when the rule will run. This is fundamental and should be based on overall objective of the rule. Rules can be run at different points in the life-cycle of a page, it is important that rules are run when the data they will be reacting to and using is actually available.



The screenshot shows a web interface for configuring rules. At the top, there's a header 'Rules'. Below it, a dark blue bar contains 'Rule 1' and a red trash icon. Underneath, a section titled 'Run this rule:' with an information icon contains a dropdown menu. The dropdown is open, showing options: 'Select a trigger', 'Once on form load', 'Once on form submission', and 'Continuously'. The 'Continuously' option is highlighted in blue. A green 'Add +' button is at the bottom left of the dropdown area.

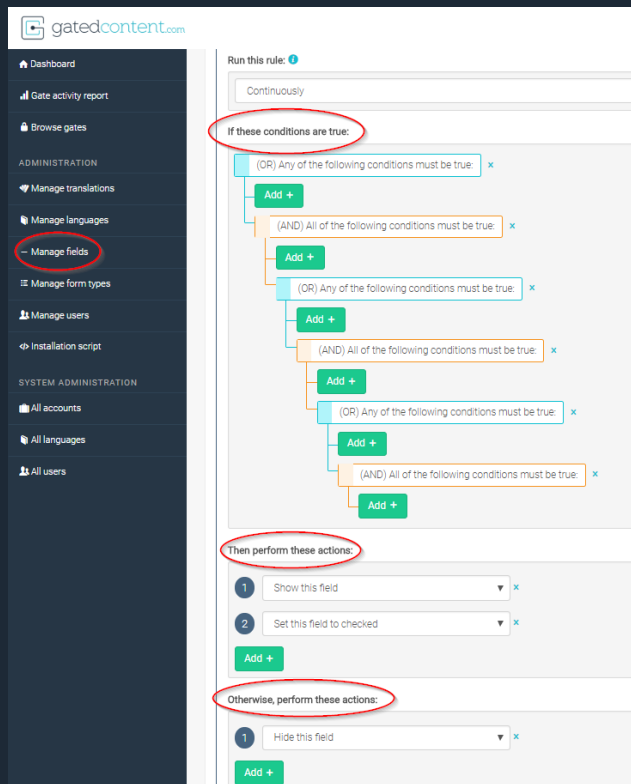
Rules that run **continuously** will react in real-time to changes within the form, whereas those that run on form load or submission will run only once at those points in the form's life-cycle.

An important note for rules that run **on form load**; these will only run at the very beginning, in the fraction of a second before the form displays, this means the user has not had an opportunity to complete any fields, if there is no prepopulation and if your rule is dependant on retrieving data from certain fields it will not work. For example, you may want run the rule on form load if it is based on a gate attribute.

Running the rule **on form submission** occurs between when the user hits the submit button and the data being sent to the MAP, this is a great way of making last minute changes to the form. For example, it is possible to populate a hidden fields based on what the user has submitted.

You only run rules **continuously** if the user needs to see the effect on the page in real-time. This can be useful for showing or hiding fields based on what data the user has entered into the form.

Conditions & Building Rules



The screenshot shows the 'Manage fields' section of the gatedcontent.com interface. The left sidebar contains navigation links: Dashboard, Gate activity report, Browse gates, ADMINISTRATION (Manage translations, Manage languages, Manage fields, Manage form types), Manage users, Installation script, and SYSTEM ADMINISTRATION (All accounts, All languages, All users). The 'Manage fields' link is highlighted with a red circle. The main area displays a rule builder for 'Run this rule: Continuously'. It features three main sections, each circled in red: 1. 'If these conditions are true:' containing a nested logic tree of (OR) and (AND) condition groups with 'Add +' buttons. 2. 'Then perform these actions:' containing a list of actions like 'Show this field' and 'Set this field to checked' with 'Add +' buttons. 3. 'Otherwise, perform these actions:' containing an action like 'Hide this field' with an 'Add +' button.

Use **Conditions, Or Groups & AND Groups** to tailor each gates behaviour

The rule builder has 3 main sections:

1. IF these conditions are true
2. THEN perform these actions
3. OTHERWISE perform these actions

Conditions & Building Rules


This is where form functionality takes on a much greater level of customisability. Using a combination of Conditions, OR Group & AND Groups it is possible to tailor each gates behaviour to your specific needs. Rules created here will override settings found in manage form types.


Important Note: The actions are only applied to the field you are editing. Conditions can examine any field but they cannot change the state of other fields.

You can have as many AND/OR rules as is necessary but bear in mind the more conditions and steps added the more complex the rule will become.


Something to bear in mind when using multiple rules is that the rules will run in order, the last rule that is run will take precedence over the others.

Example



Rule 1 (Uses fields: country; applies actions: show, uncheck, hide) 


Run this rule: 
Continuously

If these conditions are true:


Field value is in Enter a comma separated list 


Then perform these actions:

- 1 Show this field 
- 2 Set this field to unchecked 



Otherwise, perform these actions:

- 1 Hide this field 



Here is a quick example, let's say you wanted to create a checkbox that only appears if the USA, Mexico or Malaysia has been selected in the country drop down.

1. Create a form field and select checkbox from field type drop down
2. Create a rule
3. Select a continuous trigger
4. Add a condition, if the country field value is US, MX or MY
5. Select show this field as a behaviour

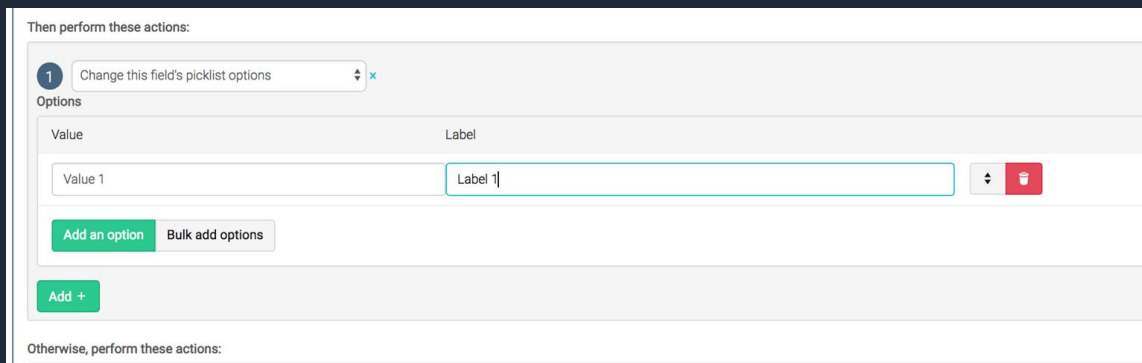
Picklists

It is possible to use rules to change the available options in picklists.

Select the action **Change this field's picklist options**.

Options can be loaded in, in the same way they can in the Manage Fields area.

Option labels are automatically passed into the Translation system in the same way as other values.



Then perform these actions:

1 Change this field's picklist options

Options

Value	Label
Value 1	Label 1

Add an option Bulk add options

Add +

Otherwise, perform these actions: