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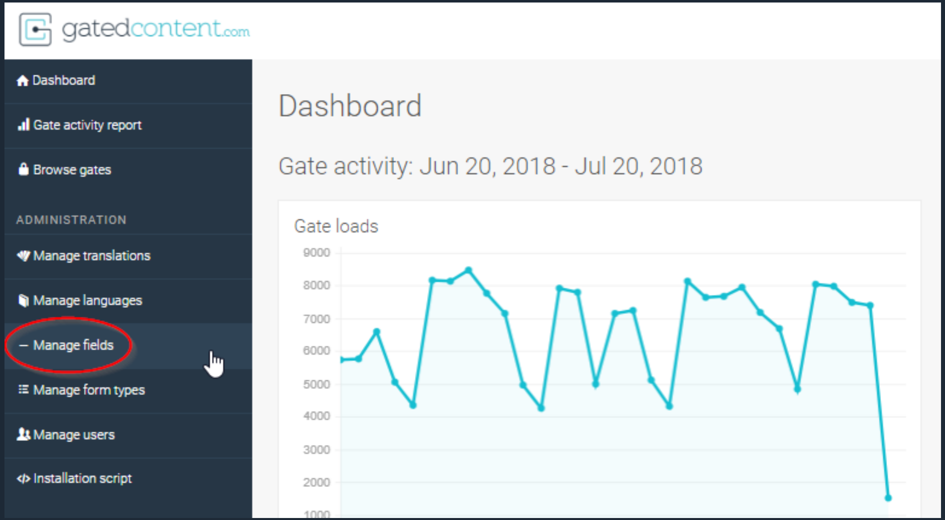
Managing Fields

How to Create & Customise Form Fields

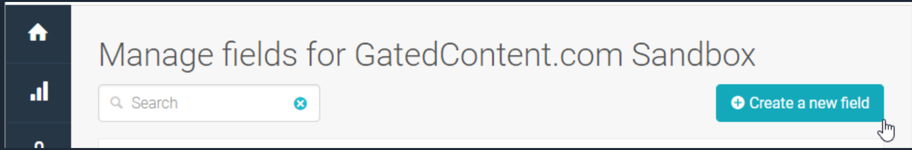
Manage Fields

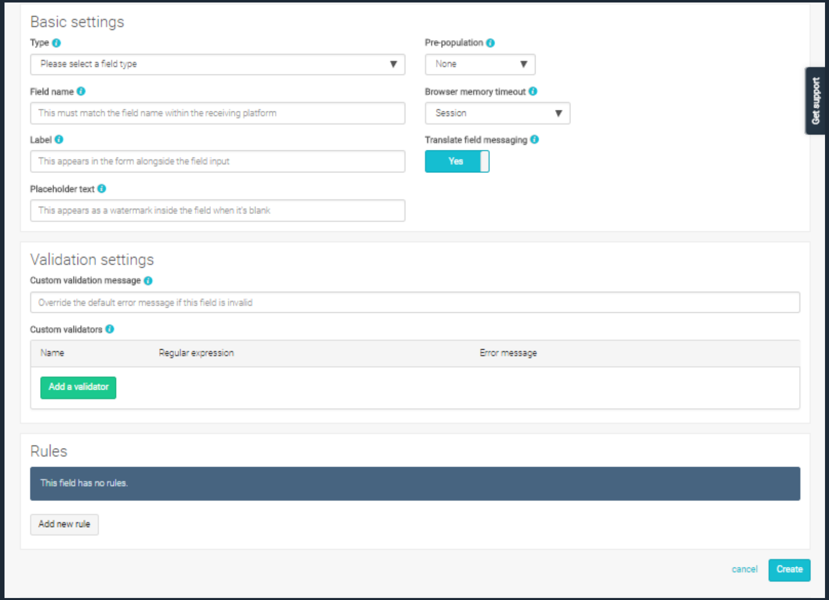


The manage fields tab can be found on the left hand side menu and once opened will display all the fields associated with your account.

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





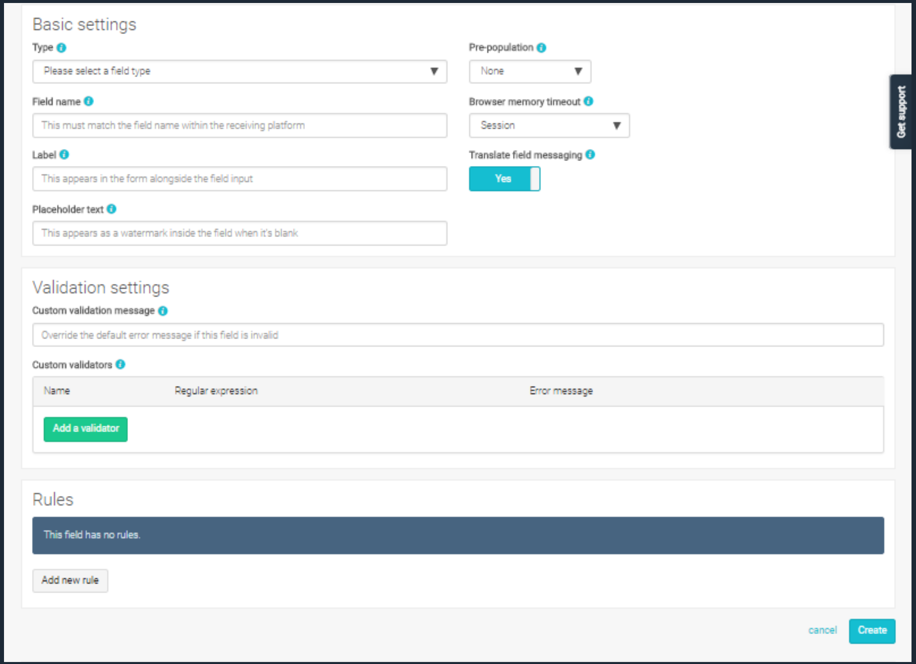
To create a new field click the Create a new field button on the top right hand side, this will load the field editor.

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.

Field options include:

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

Basic Settings



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

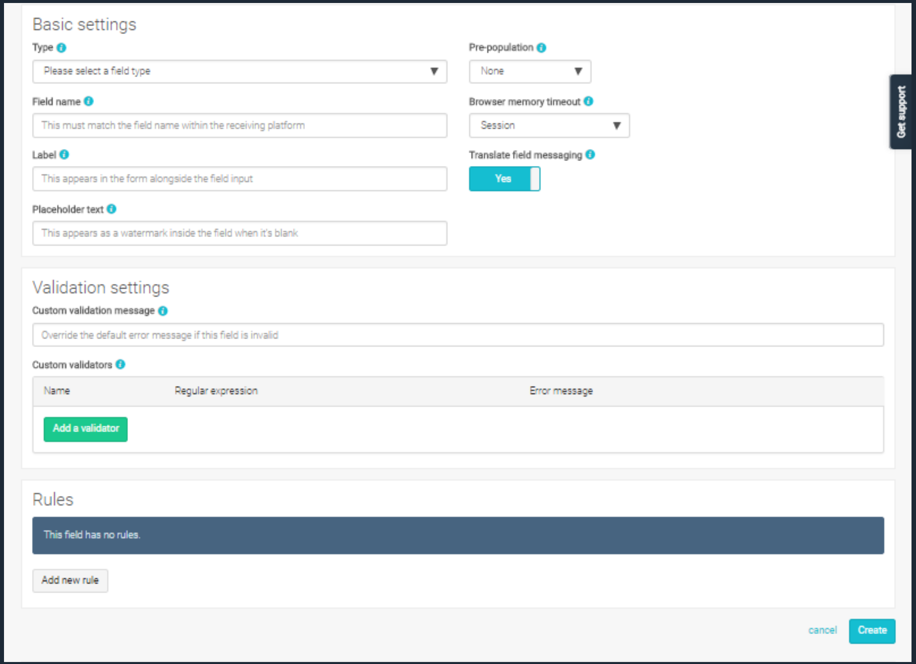
Label - This is the text that will appear to the user on the form alongside or above the field input (depending on your account styling) e.g. “Please Select a Country”

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...



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

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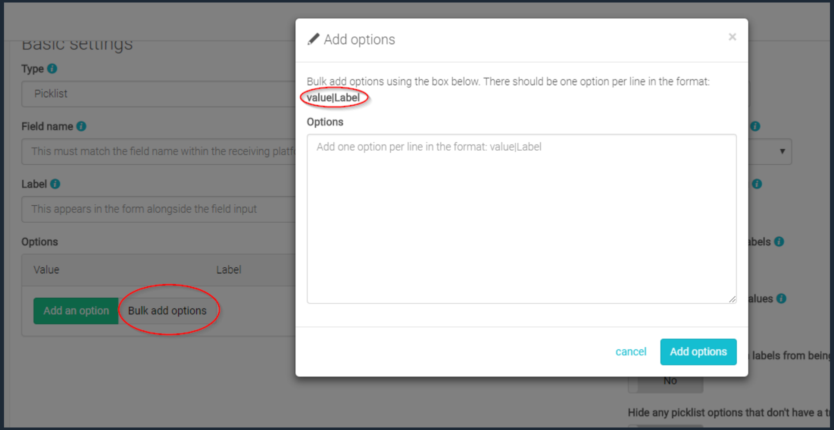
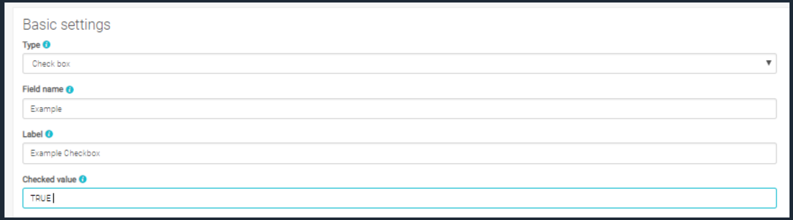




When using **checkboxes** you must provide a **checked value** that will be returned to the marketing automation platform.

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.

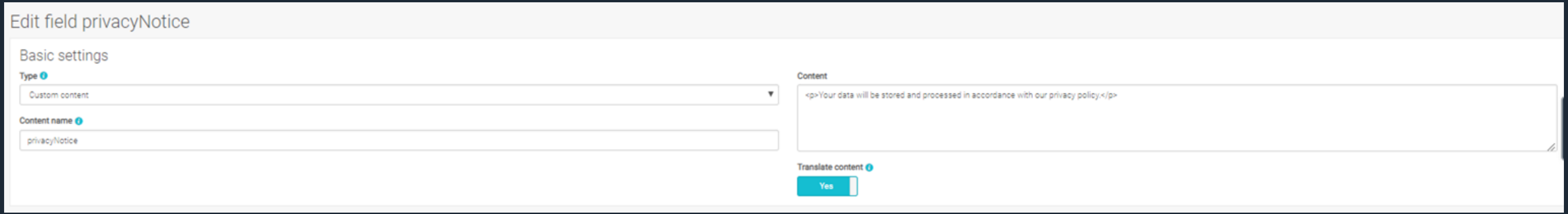
Top Tip - You can bulk add picklist options by submitting a list with one option per line in the format:

Value|Label

Value|Label

Value|Label

Custom Content



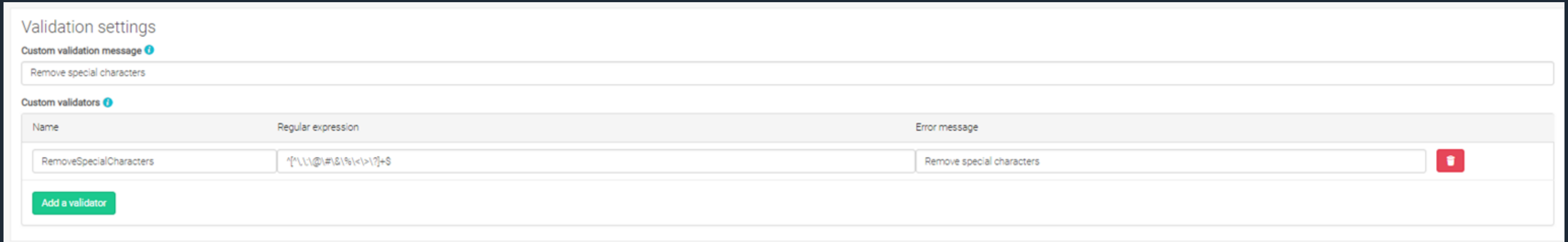
Content Name - This will not be displayed to users but is only used internally to show gate editors where the content will appear on forms, and also to identify the content for translation.

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.

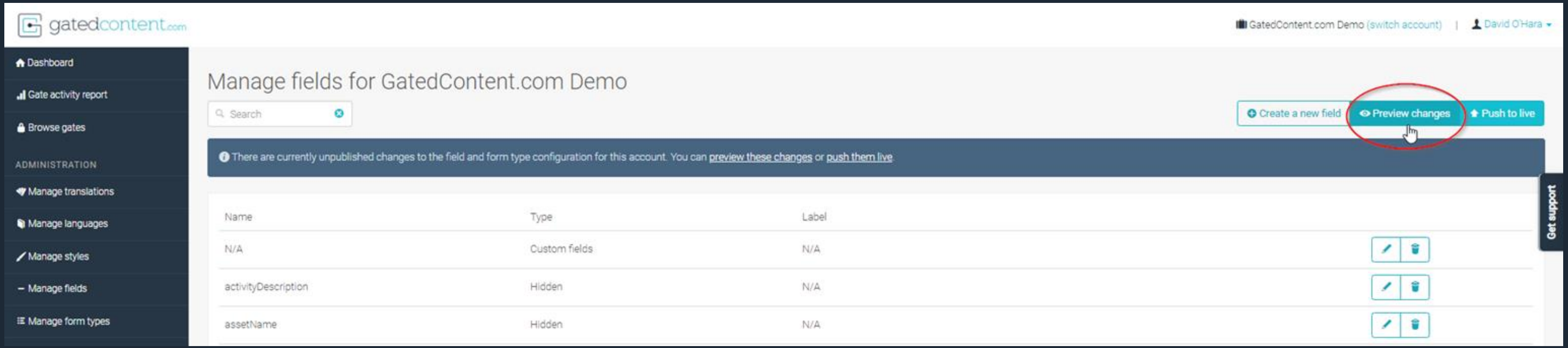
Validation Settings

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.



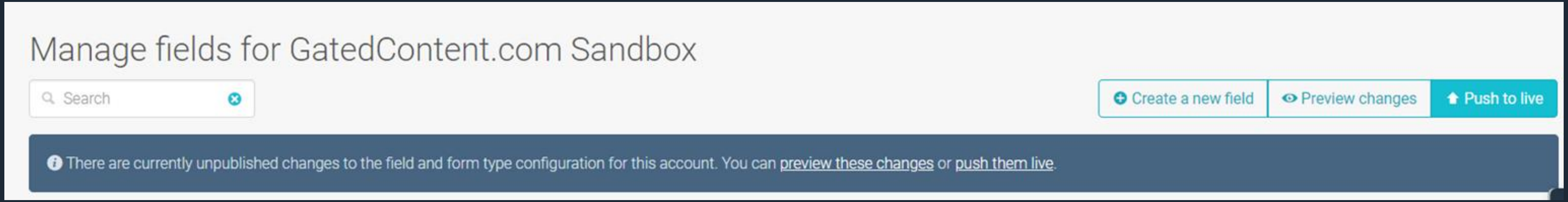
Preview Mode



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

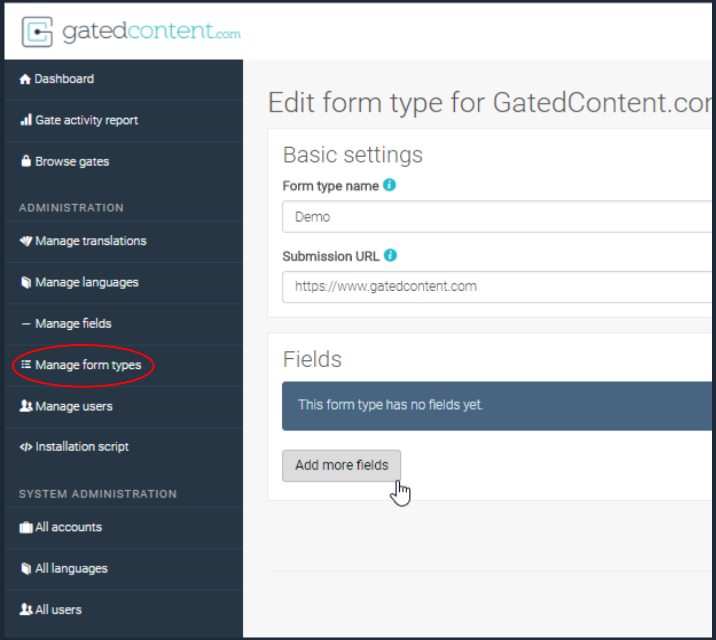


Once you have created or edited fields you will need to push the changes live before you start seeing them on gates or in the form type editor.

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

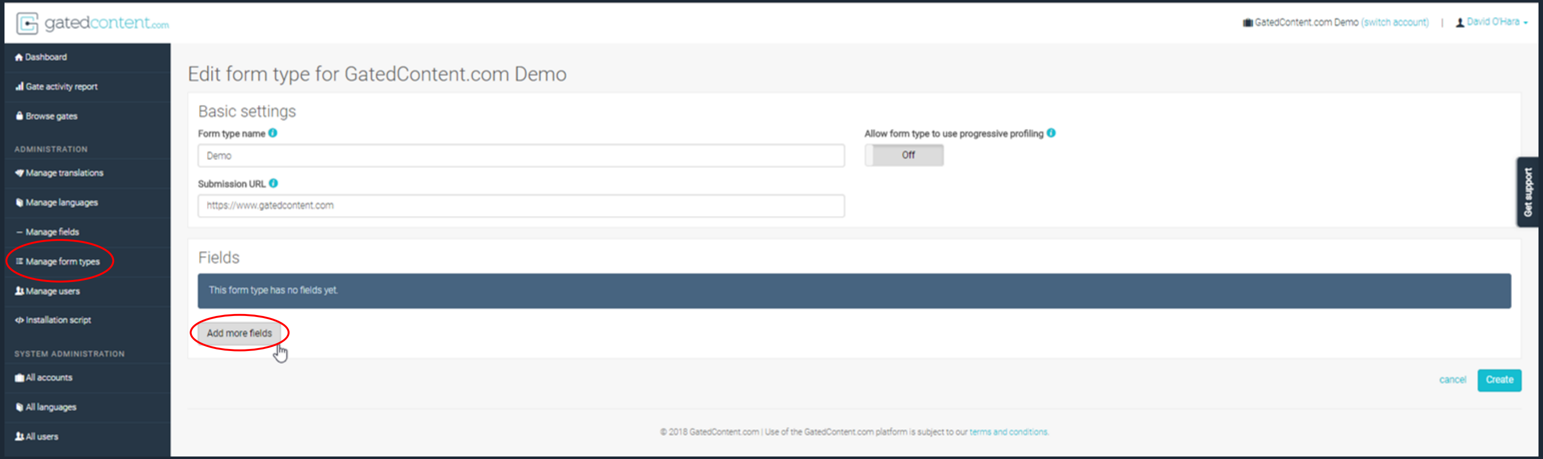
Click on Manage Form Types in the main menu

Creating a New Form Type

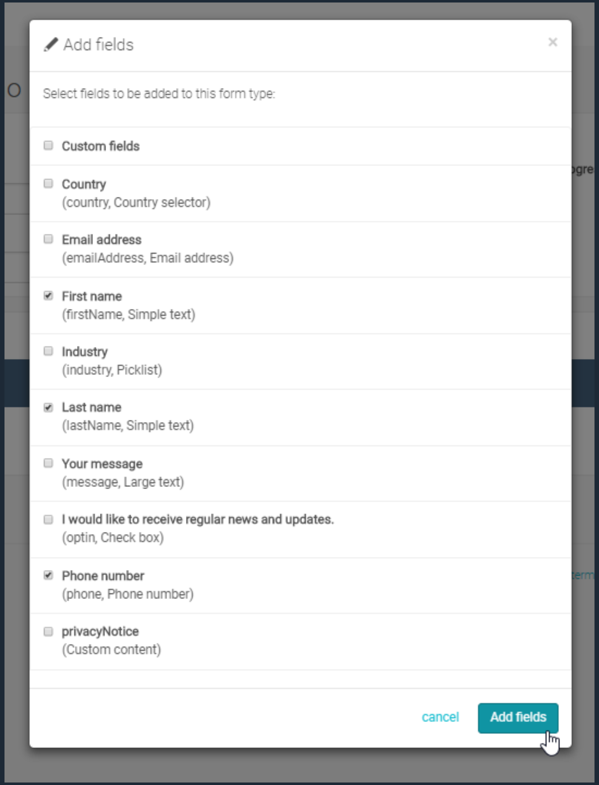
To create a new form type, click Create a new form type

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

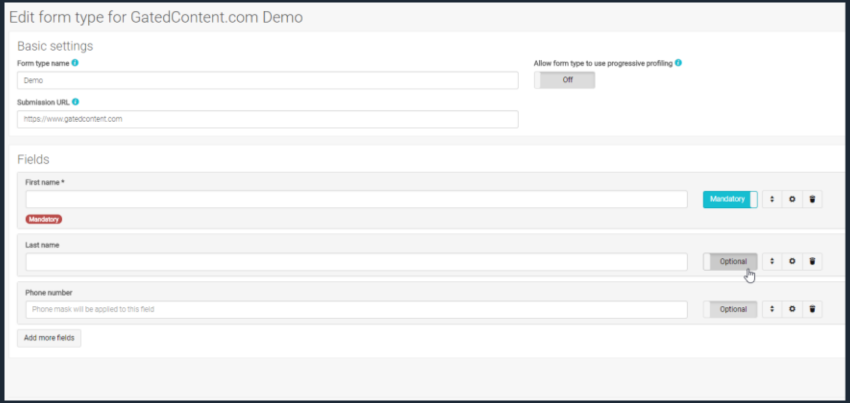


Adding Fields



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

Editing Fields



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

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

Advanced Settings

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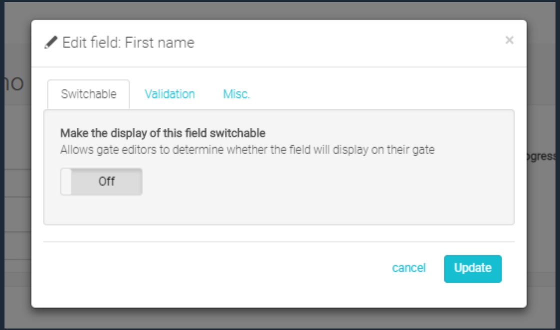
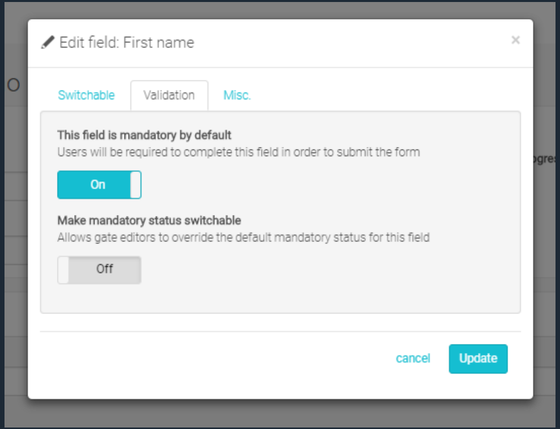
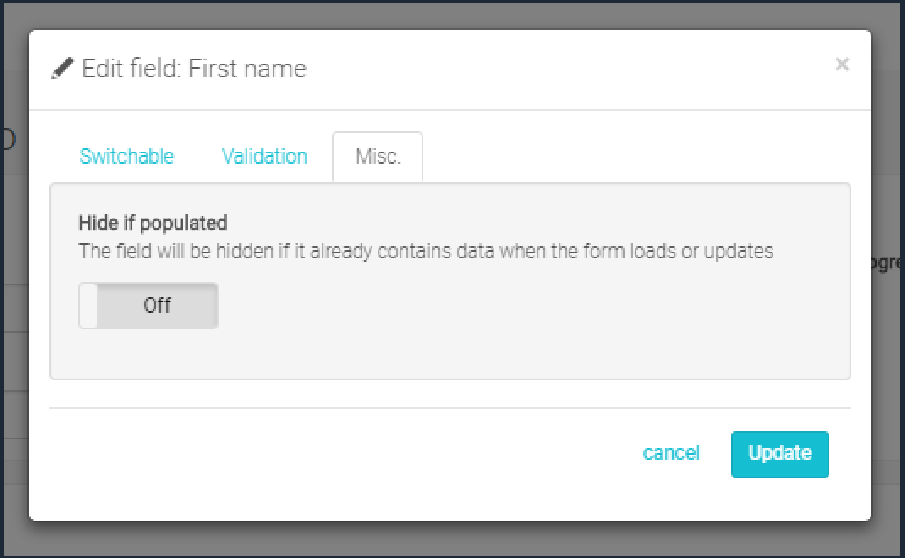


By making the display of the fields switchable, a gate editor can choose whether or not the field will be displayed to the end user.



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.

Misc.



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

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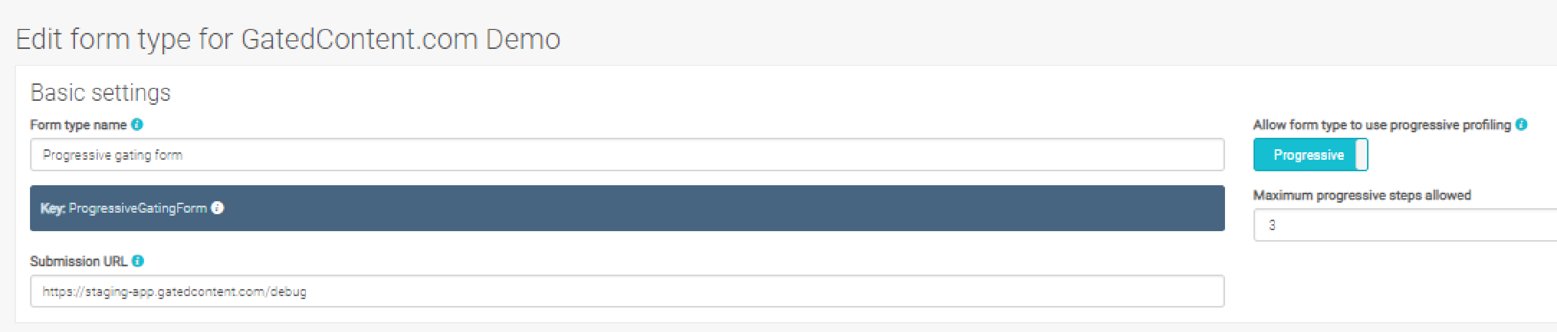
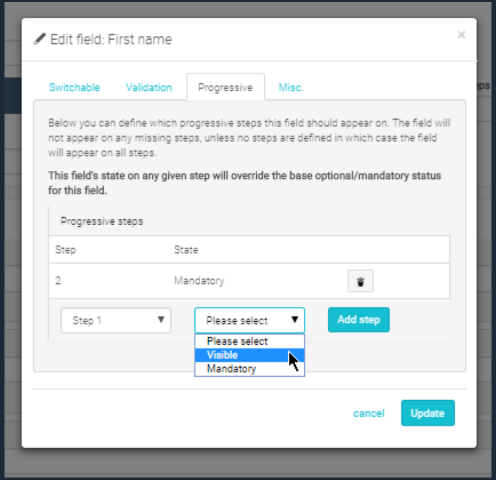


To enable Progressive Profiling activate the slider and select the number of steps required in the top right of screen while editing the form type.

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

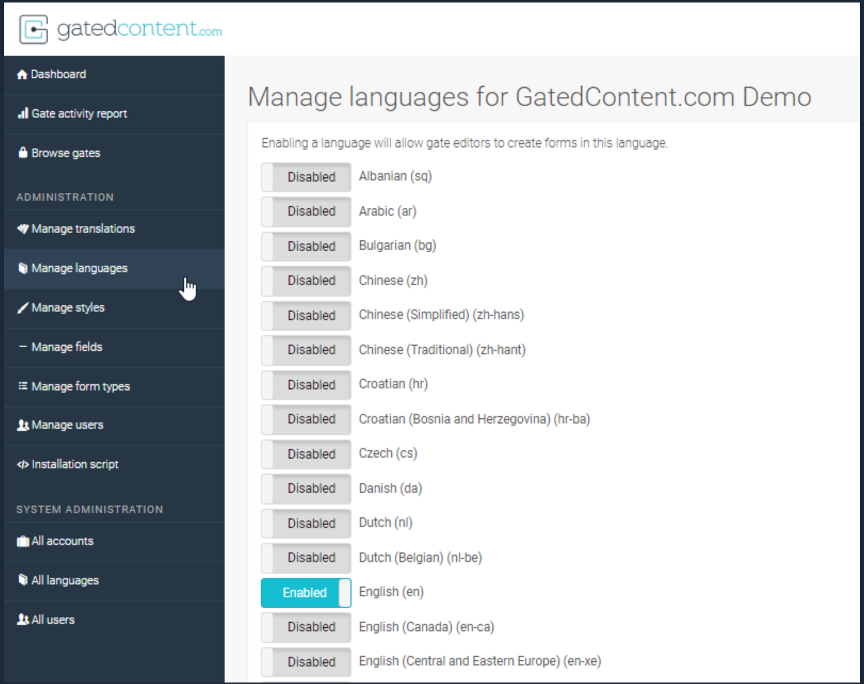
A form will show the fields in the same step number together. The lowest step number with empty pre-populated values will show. Fields not assigned a step number will always show.



Translations & Languages

Importing, Exporting & Updating

Activating Languages



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

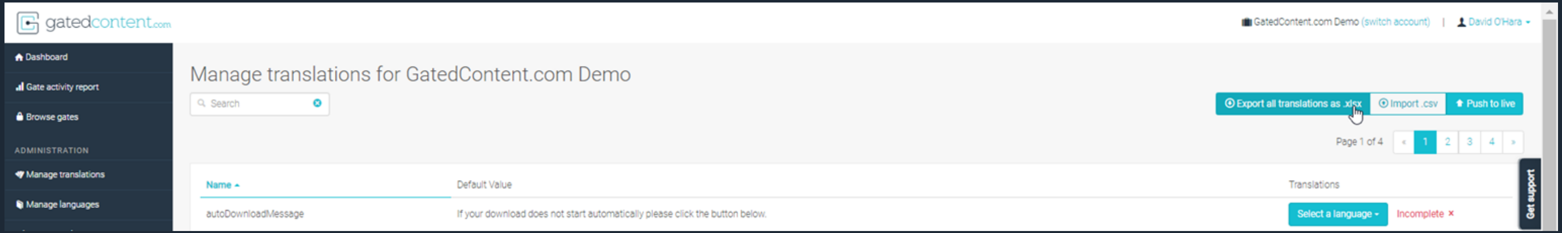
If the language you require does not appear in this list send a request to support@cirrus1.net

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

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

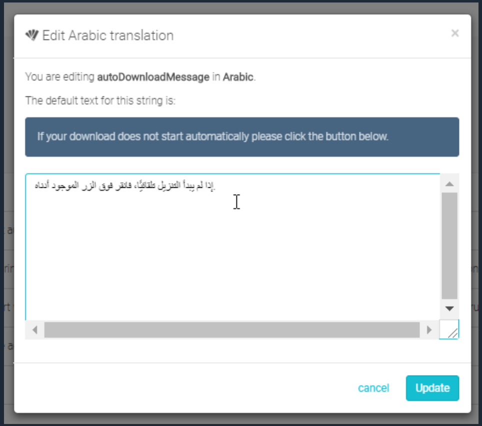
In the event that a translation is not provided for a phrase in Dutch Belgian (culture) it will inherit the translation from Dutch (language).

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

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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.

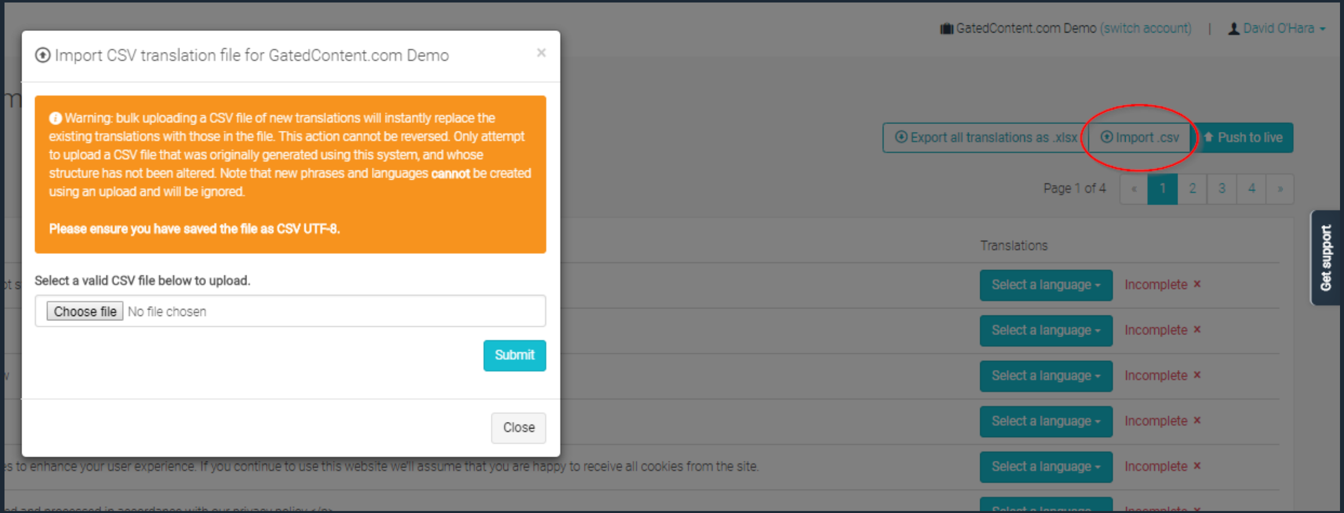
- Column A **Name** is the label for the phrases.
- Column B is the **Default Value**, if no translation has been specified for the currently active language, then this default value will be displayed.
- Everything right of Column B are translations organised by country and culture. For example, French 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 shkarkir	إذا لم يبدأ التنزيل	Ако изтеглян	Ako preuzima	Ako preuzima
3	blockTextThinkDigitalMailingAddr	<strong>Mailing address - for print versic	Adresa e post	العنوان البريدي -	Пощенски ад	Poštanska ad	Poštanska ad
4	blockTextThinkDigitalNote	¹Whilst every effort will be	Ndërsa do të	في الوقت الذي	Въпреки че и	Iako ćemo na	Iako ćemo na
5	blockTextThinkDigitalTerms	By submitting this form you are agreeinc	Me paraqitjen	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).

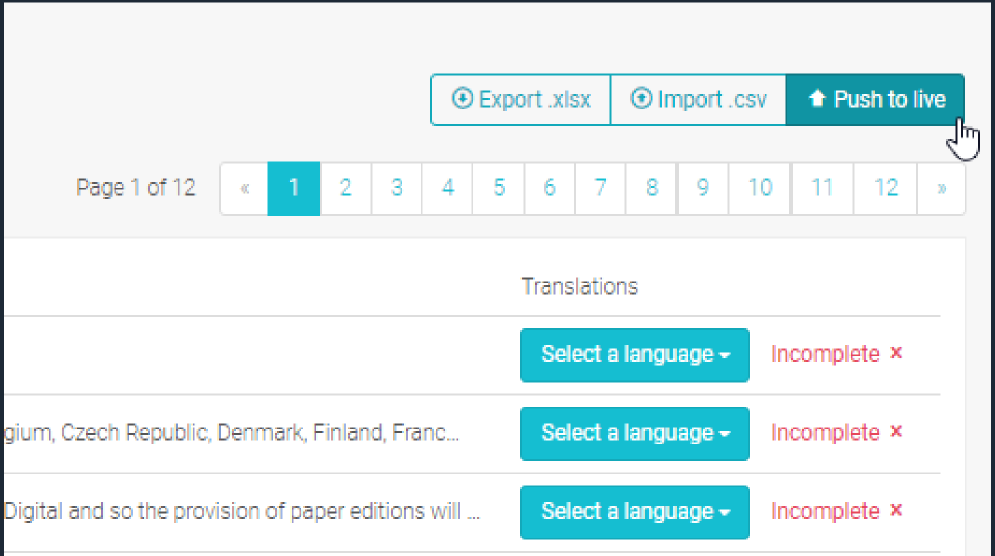
You can check updates by going to manage translations spot check phrases, defaults and languages.

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 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.



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.

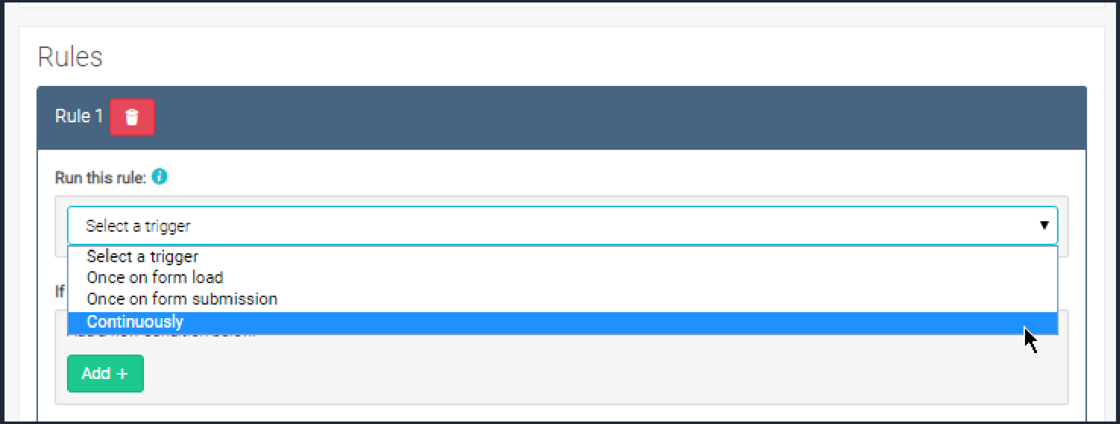
Multiple rules can be applied to a field.

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.



Triggers

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

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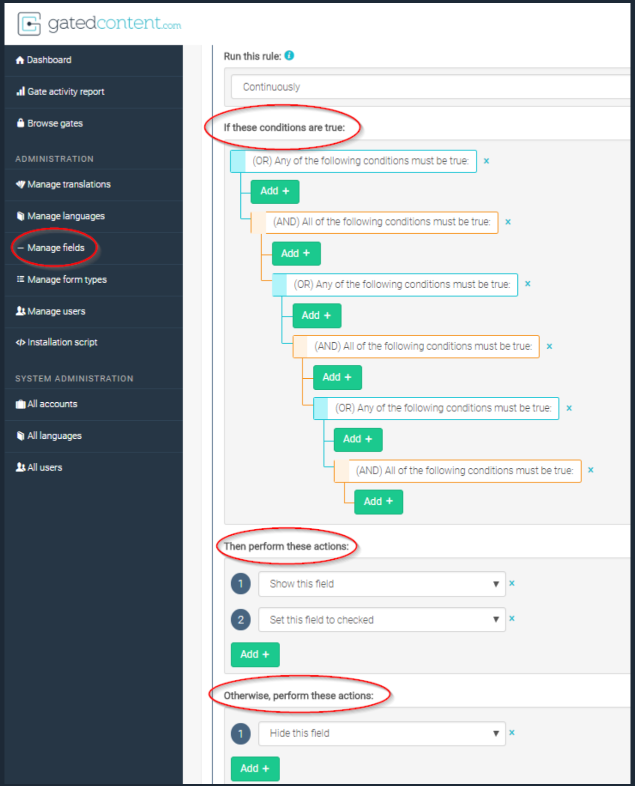

Use Conditions, Or Groups & AND Groups to tailor each gates behaviour

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

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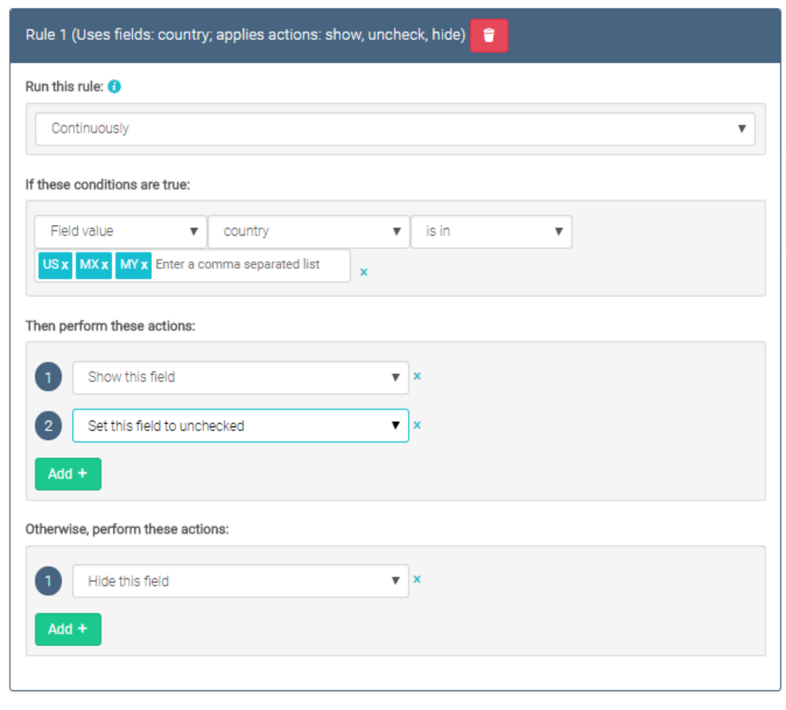
This is where form functionality takes on a much greater level of cusomisability. Using a combination of Conditions, OR Group & AND Groups it is possible to tailor each gates behaviour to your specific needs. Rules created here will override settings found in manage form types.

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



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.