WCO Form Connectors

Version 0.90

Document History

Author/Editor	Date	Reason for Change	Version
Fahd Shaaban	8/28/2014	Draft	0.90

Table of Contents

WCO Form Connectors Overview

The CrownPeak Web Content Optimizer is a robust content delivery engine that provides Testing and Targeting capabilities at run-time, all on the Client-Side. WCO doesn't require any server-side development for its core features, which makes it an ideal personalization platform working alongside the de-coupled CrownPeak CMS.

WCO can be configured to optimize and deliver targeted content to users who belong to Target Groups configured to match specific user attributes. These attributes include ambient data, form data, behavioral data, as well as 3rd Party data.

In order for WCO to optimize content based on form data, WCO can be configured to process the actual forms. WCO provides robust form processing capabilities that alleviate the need to build back-end or server-side apps or services to process forms.

One of the most powerful features of WCO's form processing capabilities is its ability to re-post or relay the collected form data to one or more 3rd Party services. This is possible thanks to WCO's Form Connectors technology.

WCO offers a number of Form posting connectors out of the box designed to post form data to 3rd Party form processors, including SalesForce, Eloqua, Marketo, ExactTarget and others.

This document demonstrates how to use these connectors, and how to configure custom connectors.

CrownPeak subscribers should consider leveraging WCO Connectors to take advantage of the following capabilities:

- Create and configure Forms to be processed by WCO, alleviating the need for a back-end application or service to processing forms.
- Use the collected form data instantly throughout the website for content targeting purposes.
- Repost the collected data to one or more form processing engines using WCO's connector technology.

Benefits of WCO Form Connectors

WCO Form Connectors allow the following:

- Quickly and easily convert any functioning form to a WCO form and configure a custom connector to continue to send the form data to its current destination. This allows authors and editors in the CMS to leverage the collected data for targeting purposes.
- Create one form and post the collected data to one or more form processing destinations using WCO connectors at the same time.

Use WCO connectors to post form data to:

- CRM platforms: Salesforce, Dynamics.
- Marketing Automation platforms: Marketo, ExactTarget, Eloqua, Silverpop.
- Any other form processing service: Surveys, Polls, Registration services.
- Any form processing application: Use the current form Action to define a custom WCO Connector.

Quickly and easily configure a custom WCO connector with the following information:

- Form Action
- Required Form Fields
- Static/Hidden form fields required by backend application or 3rd party service

Business Process guides the configuration of WCO Form Connectors

WCO connectors can be configured to support many business processes. Before starting the configuration, it is beneficial to solidify the scope of the configuration. Use this list to determine how the customer is going to use a WCO connector in their instance:

- Does the customer have an existing form they want to convert to WCO?
- Does the customer want the form data to be submitted and sent to the current form processing application or service?
- Does the customer want to capture leads by submitting the form data to a CRM, such as SalesForce, or to a Maketing Automation Platform such as Marketo?

Configuring WCO Form Connectors

Once the Business Process is understood, configure WCO Form Connectors.

Managing Connectors

The WCO Manage Connectors interface can be accessed by going to the WCO Settings area and selecting Global Settings. The Manage Connectors button is the fifth button on the right.

WCO Manage Global Settings page

Creating and Editing Connectors

Click Manage Connectors to display the Manage Connectors window to see all currently configured Connectors and offers an interface to create new connectors.

WCO Create/Edit Connector window

Creating a New Connector

To create a new connector complete the following:

- Name: This name will appear in the Connector selector drop-down in the Form Builder.
- URL: This is the form Action
- Configuration Fields: These are fields that WCO will add to the form fields that are filled out by the web user. These are fields that aren't changeable by the user, but are required by the form processing application or service.   You can define as many of these configuration fields as necessary by providing a Name and a Value for each field.

Editing a Connector

To edit a connector, select the connector from the list of connectors.

Example 1: Edit the Salesforce Connector

The URL field in this case is locked because it is a native connector in WCO. The Name field is required, additional fields can be added as necessary.

WCO Create/Edit Connector window – Salesforce Connector

Example 2: Edit the ExactTarget Connector

The URL field in this case is not locked, since this was configured as a custom connector. This configuration provides a good example of configuration fields.
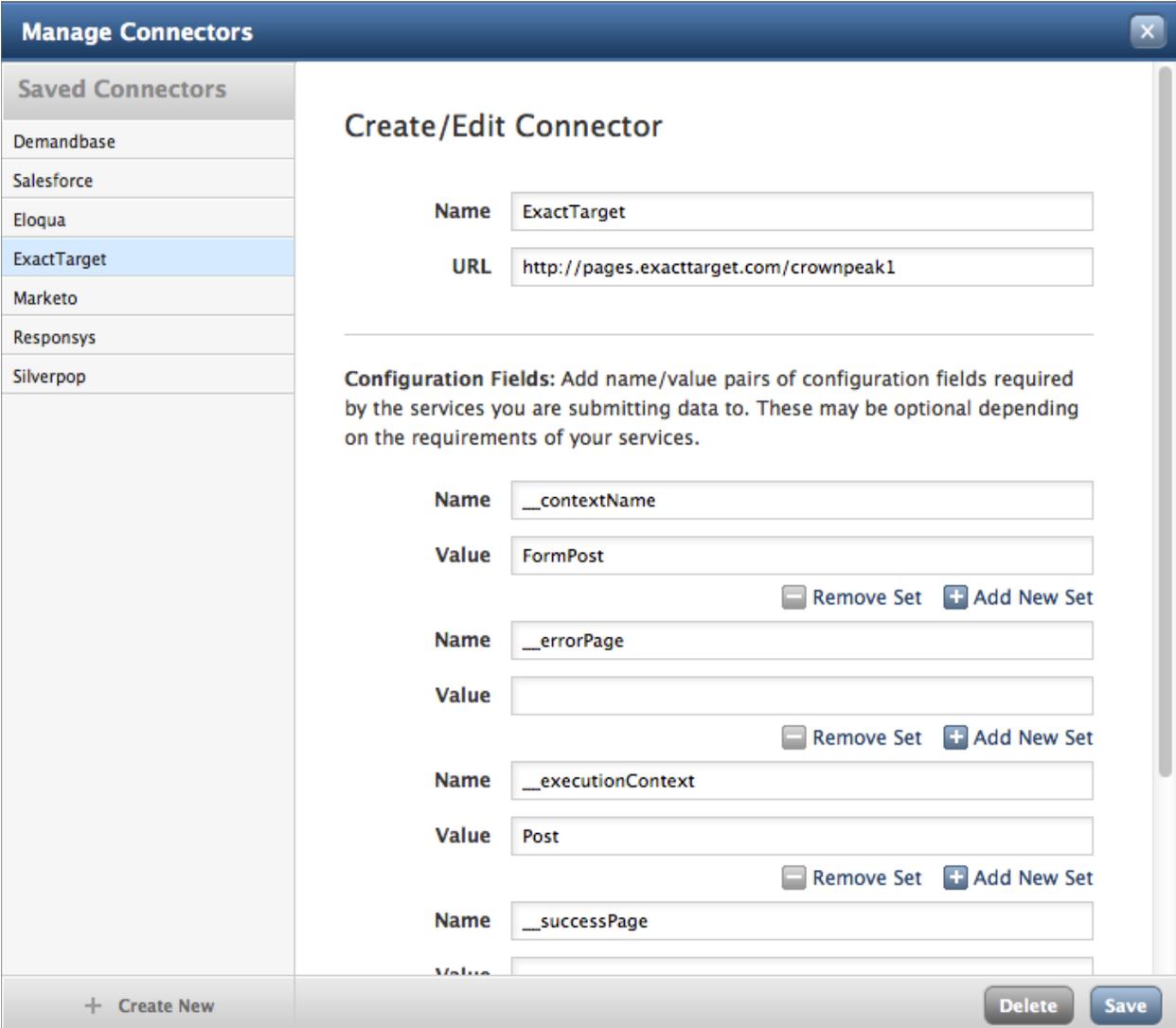
WCO Create/Edit Connectors window – ExacTarget Connector

Using WCO Form Connectors

WCO Form Connectors are used with the WCO Form Builder.

The Form Builder provides a wizard-like process to capture form configuration settings and parameters.

WCO Form Builder wizard

The Form Builder provides a way to create forms with the following tabs in the wizard:

- Customize Form Settings

- Add Fields

- Post To

- Auto-Reply

- Copy Form HTML

Customize Form Settings
Enter the following information:

- Form Name

- Redirect URL: Typically used for a thank-you page

- Option to email the form data to a list of recipients in XML or Text

- Option to customize the email

Form Builder – Customize Form Settings

Add Fields

Add fields by defining new field types (text-boxes, radio buttons, checkboxes, hidden fields, drop-downs) or choose from previously configured form fields.

Form Builder – Add Fields

Post to (Choosing Connectors)

Select one or more connectors to submit the form data to.

Form Builder – Post To (Choosing Connectors)

Auto-Reply

If a form contains an email address you can configure a response by completing the fields on the Auto-Reply tab:

- Email To

- Email Subject

- Email From

- Email Body

Form Builder – Auto-Reply

Copy Form HTML

The HTML code for the form is generated and available on the Copy Form HTML tab. The code can be customized with form validation, styled with CSS, and used in a WYSIWYG control within the CMS.

Form Builder – Copy Form HTML

WCO Form Connectors Considerations

Configuring WCO to submit collected data to any 3rd Party Service is easy, as demonstrated and discussed above. However, care in the naming of form fields must be taken to ensure the names of the fields match the form fields expected by the 3rd Party Service.

If the form is to be processed by WCO, then WCO will need to be in complete control of the form processing experience, including the Redirect URL. This is the URL the user will be redirected to once the form is processed. This means that 3rd Party Services cannot redirect the user after receiving the form data from WCO.

Notes and Additional Information

More information can be found on Connect at:
https://connect.crownpeak.com/blogs/developers/product-update-connectors

Implementation Guidelines

In general, configuring a custom WCO Form connector can be completed in about 8 hours.

Playbook Notes

https://connect.crownpeak.com