

LOGIFORMS.COM SOFTWARE

QUICKSTART GUIDE SERIES



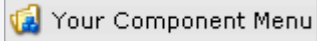
USING AUTO RESPONDERS

One of the keys to customer satisfaction is a quick, friendly, and appropriate response to enquiries. Using Logiform's Intelligent Auto-responders you can do this and much more!

This QuickStart Guide will walk you through the steps of creating context sensitive Auto Responders.

USING AUTO RESPONDERS QUICK START GUIDE

GETTING STARTED



Before you can setup and use logiforms auto responder technology with your forms you need to first select the form you want to work with. **Click the "Component Menu" Icon shown here to load your main menu.**

A Browse your project folders and click the form you want to activate.

B An overview of the selected form will load in the right side window shown here. The component details window contains key information about your form

The screenshot shows the logiforms interface. On the left, the 'Components' tree is expanded to show 'Your logiforms Components' > 'Sample Project Folder' > 'Forms & Content Bins (1)' > 'Sample Form (form)'. A green box labeled 'A' highlights the 'Sample Form (form)' item. On the right, the 'Component Details' window for 'Sample Form' is shown. It includes a toolbar with 'Edit Form', 'View Submissions', 'Delete', 'Duplicate', 'Move to New Folder', and 'Import Data'. Below the toolbar, it states 'No new Submissions for the last 7 days'. A table of details follows: Date Created: 05/16/05, Last Modified: n/a, Direct Link: [Open Form URL](#), Form Type: Standard Form, Submissions: 50, Password: N/A, Encrypted Fields: No Encrypted fields, SSL Encryption: Not Enabled, Form Fields: 12. A green box labeled 'B' highlights the 'Direct Link' field.



NAVIGATION TIP

Once you activate a component, as shown above, the Toolbar Menu will become available. Roll over the Form Designer Icon in the ToolBar to reveal the ToolBar Submenu and options for creating **Auto Responders** and editing your form.

The screenshot shows the 'Form Tools' toolbar. It has four tabs: 'Form Tools', 'Data Management', 'Integration', and 'Email Tools'. Under the 'Form Tools' tab, there are five icons: 'Form Editor', 'Layout & Appearance', 'Security', 'Notifications', and 'AutoResponder'. The 'AutoResponder' icon is highlighted with a green box.

Click the Auto Responder link shown above to Create a new Auto Responder

ENABLING AUTO RESPONDERS

A The first time you access the auto responder section for a new form, you will need to enable the auto responders by clicking the button shown below.

B Once you have enabled the auto responder, you can now start to create Auto Responder Profiles & Rules. The main Auto responder menu, shown below, is divided in to two parts. On the left you have your Auto Responder Profiles and on the right, you have Auto Responder Rules. **Click the link under the Auto Responder Profiles heading to create a new Profile.**

C The Auto Responder Rules section is shown here. Rules are used to trigger Auto Responder Profiles. Don't worry about Rules yet, they are explained later in this guide.

Auto Responder & Page Redirect Settings

Auto Responders are not currently Enabled.

To create an auto responder profile, first enable the auto responder feature and create a new profile.

[Enable AutoResponders](#)

Auto Responder Profiles

Auto Responder profiles consist of a post submission thank you page definition and a triggered email. All forms should have at least one auto responder profile, used at a minimum to display a thank you page or redirect to a thank you page.

[You have no auto responders configured. Click here to create an auto responder.](#)

Auto Responder Rules

Auto Responder rules enable you to trigger a specified Auto Responder profile based on a form submission.

[You have no Rules configured. Click here to create an auto responder Rule.](#)

USING AUTO RESPONDERS QUICK START GUIDE

CREATING YOUR FIRST AUTO RESPONDER PROFILE

- A** When creating an Auto Responder Profile, you will be asked first if you want to create a standard Auto Responder or an Auto Responder Follow Up Sequence. **Select Standard Auto Responder**
- B** An Auto Responder Profile consists of not only an Auto Responder Email, but also contains information about the thank you page. The thank you page can be created as part of the profile or you can specify a redirect URL. **Enter a friendly name for the profile and specify the optional redirect URL.**
- C** Next, select the field on your form that will contain the email address. Enter your address in the from field and specify a subject line for the email. Note, you can select from the wildcard menu to customize the subject line.

Create a Standard AutoResponder Profile

Select this option to create a standard autoresponder profile. Autoresponder profiles include post submission actions like redirecting to another page and displaying a post submission message to the respondent. Create an unlimited number of standard autoresponders.

Create an AutoResponder Follow Up Sequence

Option 2 allows you to create the standard AutoResponder & create a series of follow up emails sent at user specified intervals. This autoresponder is also available via the main application menu. Follow up sequences are metered items and email delivery counts towards your monthly limits.

Create a Respondent Update Mode AutoResponder Profile

This is not a standard autoresponder. Only use this option with forms that allow the respondent to return and edit their data. This can be done via a user email campaign. Your respondent will be able to re email campaign manager, you can add a "Feedback" campaigns. Recipients of your email campaign preferences. In both of these scenarios, the respondent will trigger the respondent mode autoresponders.

Complete the following to create an autoresponder profile. You can create an email autoresponder, implement a URL redirect, and/or create a message to appear post submission.

General Profile Settings

Profile Name

Redirect URL (Thank you page):

Specifying a Redirect url is optional. Leave this field blank if you do not have a thank you page on your server and would prefer to create a thank you page using logiforms

AutoResponder Email Settings

Leave this section blank if you do not want to send an autoresponder email.

Email Field

From Address (ie: autoreponse@greenappleco.com)

Email Subject Line:

Use wildcards to customize the subject line and make your email stand out. If your auto responder was delivered after the completion of an event registration form, show the name of the event in the subject line: "Event Registration Confirmed for [SELECTED_EVENT]"

CREATING THE AUTO RESPONDER EMAIL MESSAGE

- A** The next screen shows you a blank text area where you can enter the text for the Auto Responder Email. Logiforms can deliver multi-part emails. That is, logiforms can deliver both Text Only and HTML formatted emails. For Each Auto Responder, you can create a text version and/or and HTML version. **Use the Link shown below to toggle between text and HTML mode**
- B** When you are in HTML mode, you will see the logiforms inline Email Designer, as shown below. This powerful designer provides you with a Word Processor like interface for designing professional and attractive email content
- C** Select WildCards from the WildCard Drop down menu to personalize your email's based on values submitted through your form.

---Insert Wildcards---

HTML Email Text Version

---Insert Wildcards---

INSERT ALL FIELDS
First Name
userdomain
Last Name
Username
ResponseMethod
Phone
Email Address
Registered User
Support type
Priority
Description
Status

When using the Email Designer Interface shown in B, you can cut & paste any existing HTML into the editor. To do this, switch to Code View by clicking the code view icon at the bottom left of the editor window. Then cut & paste your HTML code.

You can link to images also by clicking the image icon and pointing to an image hosted on your server using the full path.

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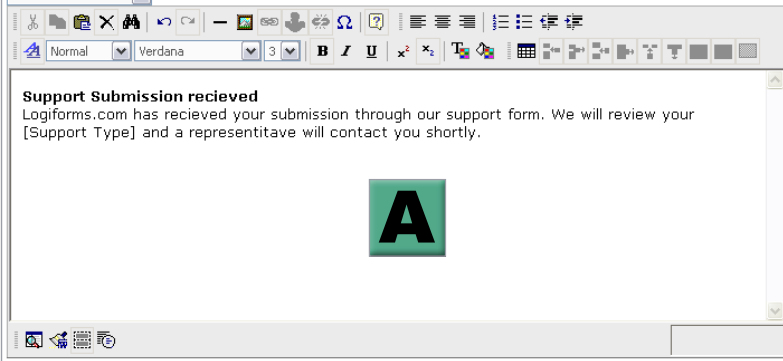
CREATING THE POST SUBMISSION PAGE

A The final step in creating an Auto Responder Profile is specifying a post submission thank you page. You can use the editor shown here to create a message that will be displayed to the user after they submit your form, or you can specify a redirect url. These options are mutually exclusive. If you want to specify a redirect URL, use the previous button.

Post Submission Page Display (Thank You page)

Create a post submission thank you message. If you selected to use a redirect url earlier, then this page will not be displayed. If you specified a redirect url on the first setup screen, you can skip this section.

---Insert Wildcard---



Support Submission recieved
Logiforms.com has recieved your submission through our support form. We will review your [Support Type] and a representitave will contact you shortly.



If you are using the IFRAME integration method, it is often most effective to use the Thank you page you can create here. This way the form is submitted inside the IFRAME and the thank you message will appear in its place.

NOTE: When you are creating or Editing an Auto Responder Profile, the Profile will not be saved until you continue through each screen shown. If you click away while in the middle of the 3 step process, all changes will be lost. Be sure to continue through to the end. You will be returned to the Auto Responder main menu.

PROFILE CREATION COMPLETE!

A After clicking continue your new profile is saved and you are returned to the Auto Responder Profile main menu. Notice the message in red indicating that your Auto Responder Settings have been updated. Displayed directly below is your new Auto Responder Profile. Use the links here to create more Auto Responder Profiles. You can then trigger specific Auto Responder Profiles using Rules, explained next.

B Click the Create New Auto Responder Rule link, shown here, to create your first Auto Responder Rule.

Autoresponder Settings Updated

Auto Responder Profiles

Auto Responder profiles consist of a post submission thank you page definition and a triggered email. All forms should have at least one auto responder profile, used at a minimum to display a thank you page or redirect to a thank you page.

1 Standard Profile:Feedback Form Autoresponse (default)

Delete Profile | Edit Profile | **Add New Profile**



Auto Responder Rules

Auto Responder rules enable you to trigger a specified Auto Responder profile based on a form submission.

[You have no Rules configured. Click here to create an autoresponder Rule.](#)



USING AUTO RESPONDERS QUICK START GUIDE

AUTO RESPONDER RULES

Personalized emails are proven to have a high response rate. With Logiforms you use auto-responder rules to trigger your context sensitive auto responses. You can set as many auto-responder profiles and rule combinations as you need.

- A** The rules wizard makes it easy to build a context sensitive auto responder. Enter the criteria for the rule as shown here. You can add up to ten filters to each Auto Responder Rule. In this way you can create complex conditional statements.
- B** Select the Auto Responder Profile that should be triggered when this rule is met. Click Save Filter to finish.
- C** Select the match type to use for this rule. Selecting **Match All**, will force each filter to be matched. Selecting **Match Any** will result in the rule returning a match when ANY of the individual filter clauses match. For more advanced combinations, select the **Custom Match** option and follow the on-screen instructions.

A

C

B

When you select a field that is shown on your form as a drop down menu or other multiple choice question, the options here are automatically shown. This makes it easy to create criteria clauses from possible combinations of selections. Sometimes however, you might want to type your own criteria for these fields. If you want to do this, just click the blue & green cycle button to enable typing in the criteria field.

MANAGING PROFILES & RULES

- A** Use the auto responder management tools to manage an unlimited number of profiles and triggers per form. Add intelligence to your website communication through this easy to use interface.

Its also worth noting that Notification Profile's use a very similar interface including Profiles & Rules. Use what you have learned here to also create Notification Profiles & Rules.

Disable Auto Responders

A

Auto Responder Profiles

Auto Responder profiles consist of a post submission thank you page definition and a triggered email. All forms should have at least one auto responder profile, used at a minimum to display a thank you page or redirect to a thank you page.

1 Standard Profile:Feature Request AutoResponder (defa
2 Standard Profile:Urgent Response

[Delete Profile](#) | [Edit Profile](#) | [Add New Profile](#)

Auto Responder Rules

Auto Responder rules enable you to trigger a specified Auto Responder profile based on a form submission.

1. Urgent
2. Feature Request

[Edit](#) | [Delete](#) | [Save Rule Order](#) | [Add New Rule](#) | ⬇️ ⬆️

Note: Auto responders rukes are executed in the order they are listed above. Once a rule is matched, the profile is triggered and further processing is aborted. Use the up/down arrows to set the order in which the rules will be processed.