Web Forms for Marketers 9.0

Installation Guide

Installation guide for administrators and developers

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Chapter 1

Installing the Web Forms for Marketers Module

This chapter describes how to install the Web Forms for Marketers module.

This chapter contains the following sections:

- Installation
- Multiserver Configuration

1.1 Installation

You can download the Web Forms for Marketers (WFFM) package from the Sitecore Downloads page – https://dev.sitecore.net.

1.1.1 Prerequisites

- Sitecore Experience Platform (XP) 9.0 rev. 171002 (Initial Release).
- The Web Forms for Marketers 9.0 rev. 171003 package.

1.1.2 The Installation Process

The Web Forms for Marketers module is distributed as a Sitecore package.

To install the module:

1. On the **Launchpad**, click **Control Panel**, **Administration**, **Install a Package**.

   or

2. On the **Launchpad**, click **Desktop**, and then click **Sitecore Start** button, **Development Tools**, **Installation Wizard**.

   The Installation Wizard guides you through the installation process.

3. Select the `Web Forms for Marketers 9.0 rev.171003.zip` Sitecore package.

4. Read and accept the license agreement when prompted.

When the installation is completed, you must perform the following post-installation steps:

1. In the **Restricting Placeholders** wizard, define the list of placeholders that you want to have available when you add the forms to the layouts.

2. Publish the content to the Web database.

3. On the reporting database of your current instance, run the `[site root]\Website\Data\WFFM_Analytics.sql` file.

   This creates four additional tables in your reporting database.

4. In the `Web.config` file, in the `configuration\system.webServer\handlers` node, add the following nodes:

   ```
   <add name="CaptchaImage" verb="*" path="CaptchaImage.axd"
   type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
   Sitecore.Forms.Core" />

   <add name="CaptchaAudio" verb="*" path="CaptchaAudio.axd"
   type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
   Sitecore.Forms.Core" />
   ```

Optionally, if you want to use the Web Forms for Marketers features such as forms creation, in Japanese, German, or Danish client language, you must:

1) On the **Launchpad,** click **Control Panel**, and in the **Localization** section, click **Import languages**.

2) In the **Import Languages** dialog box, in the **language file name** field, click **Browse**.

3) Navigate to the `\Website\temp\WFFM` folder and select the relevant language file, and then click **Open**.

4) In the **Import Languages** dialog box, click **Next**.

5) Click the **Database** drop-down arrow and select the relevant database.

6) Click **Import**.

1.2 Multiserver Configuration

To use the Web Forms for Marketers module in multiserver environments, follow the instructions in this section for the Content Management (CM), Content Delivery (CD), and Processing servers.

Starting with Web Forms for Marketers 9.0 rev.171003, you no longer have to install the module to the Reporting server.

Note
To simplify your multiserver configuration, the Web Forms for Marketers 9.0 module supports rules-based configuration and no longer requires you to enable specific configs or settings in the CM, CD, or Processing servers.

1.2.1 Configuring the CM Server

To configure the CM server:

- On the CM server, install the `Web Forms for Marketers 9.0 rev.171003.zip` package as described in *The Installation Process* section.

1.2.2 Configuring the CD or Processing Server

On the CD or Processing server, you must use one of the following installation options:

- Install the `Web Forms for Marketers 9.0 rev.171003.zip` package as described in *The Installation Process* section.

- Extract the `Web Forms for Marketers 9.0 rev.171003.zip` package, and then extract the `Packages.zip` package, and copy the content of the `\Files` folder to the `\Website` folder of your CD instance or Processing Server.

- Use any file syncing method to sync your `\Website` folder. Ensure that your CD server has the same Web Forms for Marketers files as your Processing server.

1.3 Configuring the MVC Form Rendering

You can use the following example to configure the MVC Form Rendering:

1. In the `\Website\Views\Shared` folder of your website, create a `_Layout.cshtml` page for the MVC rendering, and add the following code:

```
@using Sitecore.Mvc
@using System.Web.Optimization
@using Sitecore.Mvc.Analytics.Extensions

<!doctype html>
<html>
  <head>
    @Html.Sitecore().Placeholder("header")
    <title>@Html.Sitecore().CurrentItem.DisplayName</title>
</head>

<body>
  <div class="container">
    @RenderBody()
  </div>
</body>
</html>
```

2. Insert the link to this page in each of the layouts that you have:

```
@{
Layout = "~/Views/Shared/ Layout.cshtml";
}
```