

OptimizePress Integration

HandL UTM Grabber / Tracker How to collect and track UTM variables via OptimizePress step by step

- [OptimizePress and Infusionsoft Integration](#)
- [OptimizePress Pages \(Enable Scripts & Styles\)](#)

OptimizePress and Infusionsoft Integration

Create custom fields in infusionsoft

Create the custom fields as explained [here](#). You can create one field for each UTM variables and HandL parameters matching the naming convention (it can be any name but it is easier to follow the naming convention for mapping) here [Native WP Shortcodes](#)

We recommend creating a separate tab called "Tracking" and using subheader to separate parameters for better visualization (shown in the image below)

Tracking

UTMs (section header)

↓

↑

utm_campaign (Text)

↓

↑

utm_source (Text)

↓

↑

utm_medium (Text)

↓

↑

utm_term (Text)

↓

↑

utm_content (Text)

↓

↑

gclid (Text)

+

Add a custom field

HandL Parameters (section header)

↓

↑

handl_original_ref (Text)

↓

↑

handl_ip (Text)

+

Add a custom field

+

Add a section header

Add the new custom fields in your form in Campaign

Create the webform as explained here <https://help.infusionsoft.com/help/create-a-web-form> in the Campaign.

Include custom fields as text fields (not hidden - we'll hide them in OptimizePress) using

```
Field snippet
```

section as shown in the image below.

Design

Thank-you Page

Settings

Code

Format

Insert

Snippets

Field Snippets

Format

Font family

Font size

Link

Unlink

Paste as Text: Off

Find

Find & Replace

Layout & Style

B

I

U

ABC

A

ab

Link

Unlink

Paste as Text: Off

Find

Find & Replace

Layout & Style

First Name *

Email *

utm_campaign

utm_source

utm_medium

utm_term

utm_content

gclid

handl_original_ref

handl_ip

Submit

First Name *

Email *

utm_campaign

utm_source

utm_medium

utm_term

utm_content

gclid

handl_original_ref

handl_ip

Publish the campaign

Create your automation in the campaign and publish the campaign to persist the changes.

Create your optin form in OptimizePress and Select Integration as "Infusionsoft"

Shown in the image below

Select Integration

[Add New Integration](#)

Select autoresponder or email service provider you want to send your form data to



(Default) Email



Infusionsoft



Webhook



Zapier

Next Step

Select tag and form in Action

List, Tag and Webhook Settings

[Refresh](#)

Integrate your form with Infusionsoft. Choose a tag to apply when this subscriber is added. You can also use the fields from a form, but we will not submit the data through this form. [Read our Infusionsoft tutorial here](#)

Apply Tag

Demo Tag

Use fields from this form

Demo Form

Go Back

Next Step

Select all the custom fields

Form Fields

Choose your form fields

<input checked="" type="checkbox"/> First Name *	<input type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Email *	<input checked="" type="checkbox"/> <input type="checkbox"/> inf_form_xid
<input checked="" type="checkbox"/> <input type="checkbox"/> inf_form_name	<input checked="" type="checkbox"/> <input type="checkbox"/> infusionsoft_version	<input type="checkbox"/> Phone Number	<input type="checkbox"/> utm_campaign
<input type="checkbox"/> utm_source	<input type="checkbox"/> utm_medium	<input type="checkbox"/> utm_term	<input type="checkbox"/> utm_content
<input type="checkbox"/> gclid	<input type="checkbox"/> handl_original_ref	<input type="checkbox"/> handl_ip	

☒ Fields are required for this integration to work.

☐ Fields will not be shown.

Go Back

Next Step

and click next until complete

Select Optin Form > Settings > Advanced Options

Mark the fields as invisible, they will disappear in the form visual

Optin Form

DESIGN

ADVANCED

Fields ^

First Name *	
E-mail	
Phone Number	
utm_campaign	
utmsource	
utm_medium	
utm_term	
utm_content	
gclid	
handl_original_ref	
handl_ip	

Positioning ▾

Responsive ▾

Animation & Delay ▾

Click each input and > Input Settings > Default Value

Type the corresponding shortcode name for each individual field. You can see the list of

shortcodes available here [Native WP Shortcodes](#)

Below image shows for utm_campaign, similarly you can do it for all the samples.

The image shows a configuration interface for a shortcode. At the top, there's a blue header with the word "Input" and some icons. Below this is a tabbed interface with four tabs: "Label", "Input", "Icon", and "Validation". The "Input" tab is currently selected. Inside the "Input" tab, there are three main sections: "Required" with a toggle switch set to "No", "Default Value" with a text input field containing "[utm_campaign]", and "Placeholder" with a text input field containing "Enter your utm_campaign". Below these sections is a "Width" section with a slider and a numeric input field showing "553.59". At the bottom of the panel, there are three expandable sections: "Input Positioning", "Animation & Delay", and "Advanced", each with a downward arrow icon.

We also recommend adding CSS class for each field as shown below.

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📏

ds

- Element Positioning
- Input Positioning
- Animation & Delay
- Advanced ↺

Element ID

op3-element-jjBCsZ3L

Element Caption

Input #jjBCsZ3L

CSS Classes

utm_campaign

Save the page in OptimizePress, and you are done!

OptimizePress Pages (Enable Scripts & Styles)

If you are using OptimizePress, make sure HandL UTM Grabber is enabled for Frontend...

New

Clear OP3 Cache

Delete Cache

Howdy, Antia B

Dashboard

Create New Page

Template Store

Integrations

Settings

Tools

Help

Settings

All your OptimizePress Settings

General

Integrations

Recaptcha

Affiliates

Scripts And Styles

Legacy Features

Advanced

Enable Scripts And Styles

By default all external plugins/theme scripts and styles are disabled on OP3 Blank Template. Settings here will also affect any page created with templates in our template library.

Plugin	Type	Js	Css
Ahrefs SEO	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
Akismet Anti-Spam	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
Edit Author Slug	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
File Upload Types	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
HandL UTM Grabber v3	Frontend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Header and Footer Scripts	Frontend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jetpack	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
LuckyWP Table of Contents	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
OptimizePress 2 GET Param Shortcode	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
Pretty Links Beginner Edition	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
Redirection	Frontend	<input type="checkbox"/>	<input type="checkbox"/>
Simple YouTube Responsive	Frontend	<input type="checkbox"/>	<input type="checkbox"/>

Plugin	Type	Js	Css
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Akismet Anti-Spam	Backend	<input type="checkbox"/>	<input type="checkbox"/>
Edit Author Slug	Backend	<input type="checkbox"/>	<input type="checkbox"/>
File Upload Types	Backend	<input type="checkbox"/>	<input type="checkbox"/>
HandL UTM Grabber v3	Backend	<input type="checkbox"/>	<input type="checkbox"/>
Header and Footer Scripts	Backend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jetpack	Backend	<input type="checkbox"/>	<input type="checkbox"/>
LuckyWP Table of Contents	Backend	<input type="checkbox"/>	<input type="checkbox"/>
OptimizePress 2 GET Param Shortcode	Backend	<input type="checkbox"/>	<input type="checkbox"/>
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