

# 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.



## 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 panel for an 'Input' field. At the top, there's a blue header with the word 'Input' and some icons. Below this, there are four tabs: 'Label', 'Input' (which is selected), 'Icon', and 'Validation'. The 'Input' tab contains the following settings:

- Required:** A toggle switch set to 'No'.
- Default Value:** A text box containing '[utm\_campaign]'.
- Placeholder:** A text box containing 'Enter your utm\_campaign'.

Below these settings, there's a 'Width' section with a slider and a text box showing '553.59' with 'px %' next to it. At the bottom, there are three expandable sections: 'Input Positioning', 'Animation & Delay', and 'Advanced', each with a downward arrow.



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!

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