

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

First Name *

First Name *

Email *

Email *

utm_campaign

utm_campaign

utm_source

utm_source

utm_medium

utm_medium

utm_term

utm_term

utm_content

utm_content

gclid

gclid

handl_original_ref

handl_original_ref

handl_ip

handl_ip

Submit

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 *	<div></div>
E-mail	<div></div>
Phone Number	<div></div>
utm_campaign	<div></div>
utm_source	<div></div>
utm_medium	<div></div>
utm_term	<div></div>
utm_content	<div></div>
gclid	<div></div>
handl_original_ref	<div></div>
handl_ip	<div></div>

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. The panel has tabs for 'Label', 'Input', 'Icon', and 'Validation'. The 'Input' tab is selected. The settings are as follows:

- Required:** A toggle switch set to 'No'.
- Default Value:** A text box containing '[utm_campaign]'.
- Placeholder:** A text box containing 'Enter your utm_campaign'.
- Width:** A slider control set to 553.59 px.
- Input Positioning:** A dropdown menu.
- Animation & Delay:** A dropdown menu.
- Advanced:** A dropdown menu.

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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