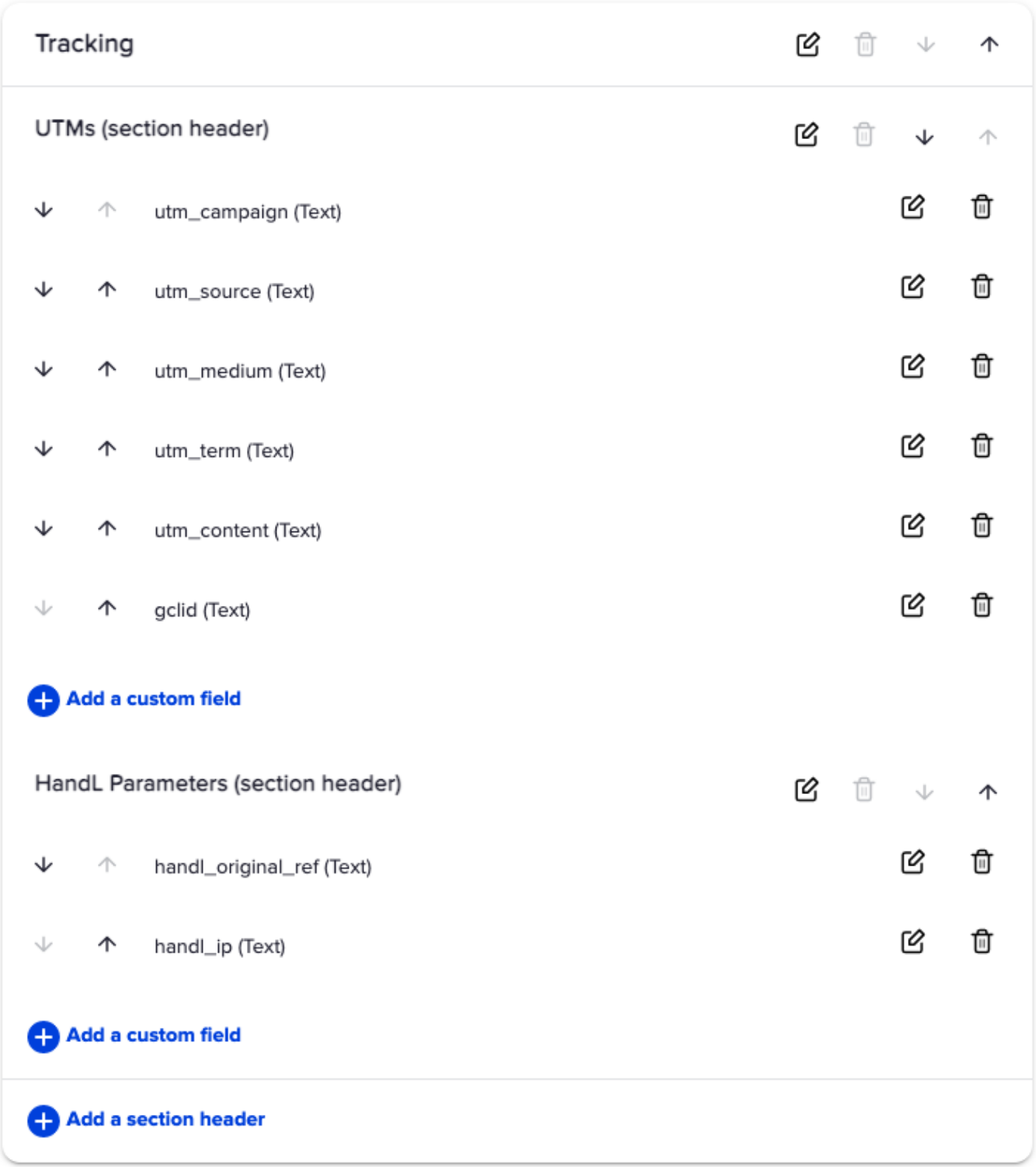
OptimizePress and Infusionsoft Integration

Create custom fields in infusionsoft

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

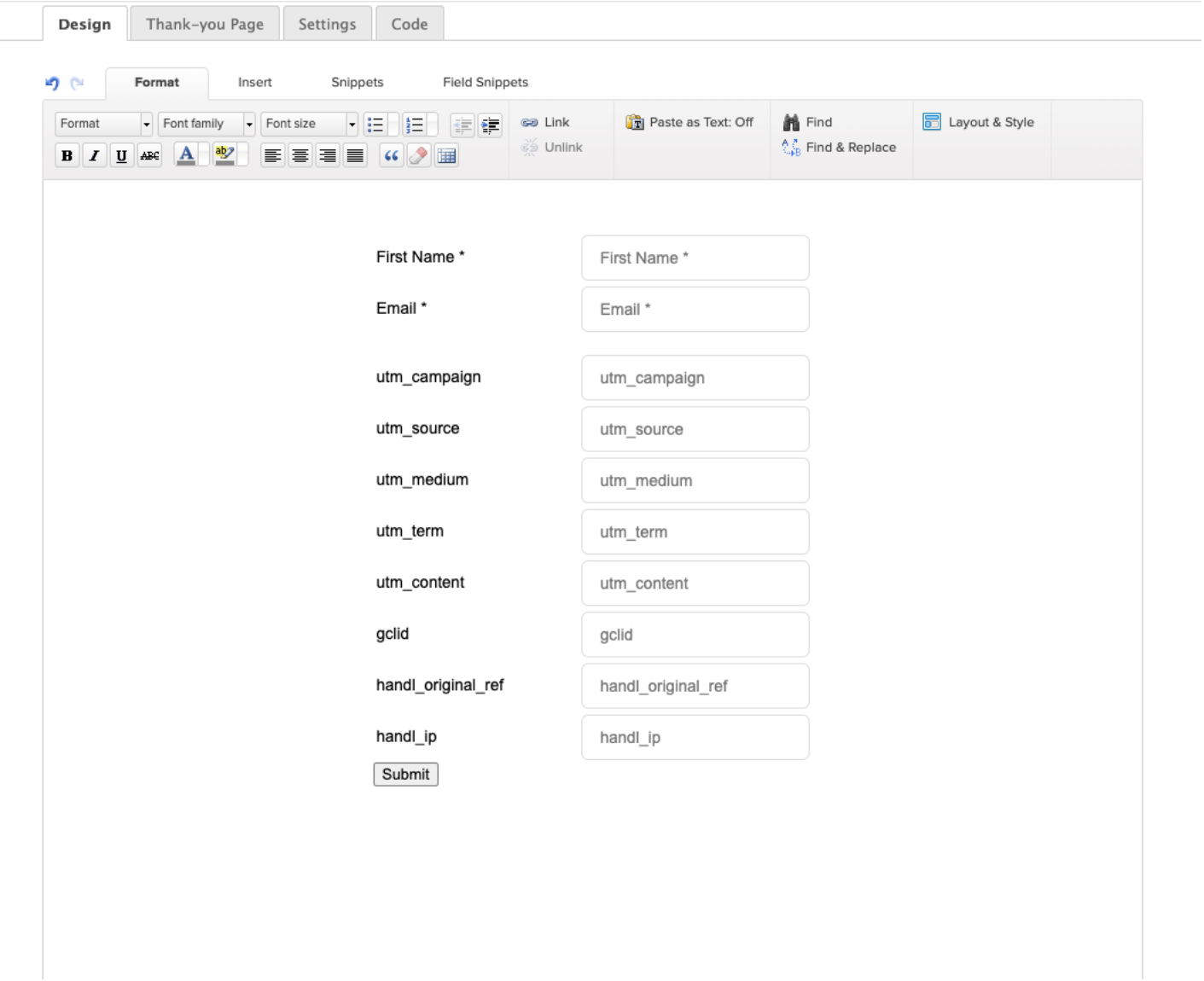
We recommend creating a seperate tab called "Tracking" and using subheader to seperate parameters for better visualization (shown in the image below)



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.

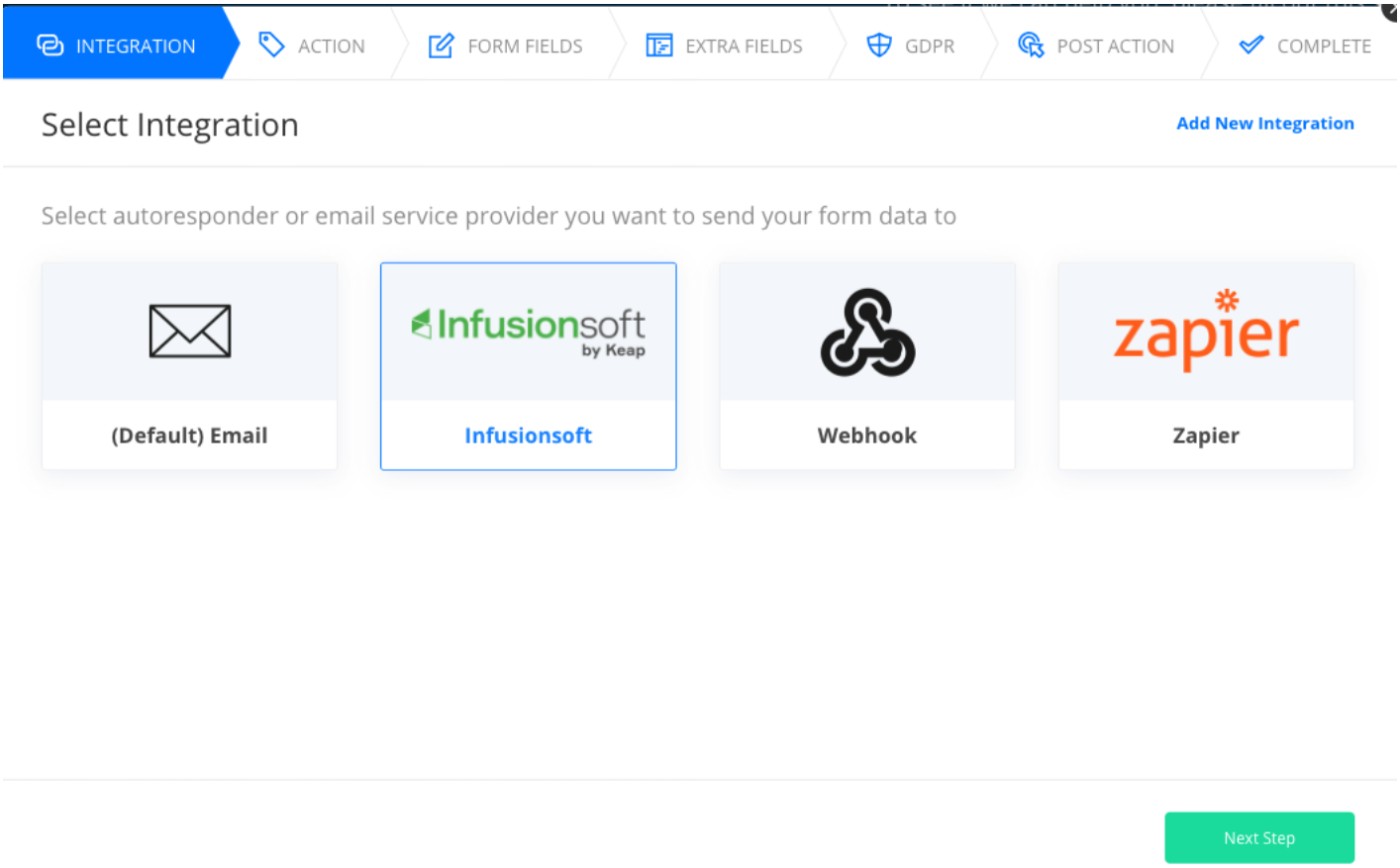


Publish the campaign

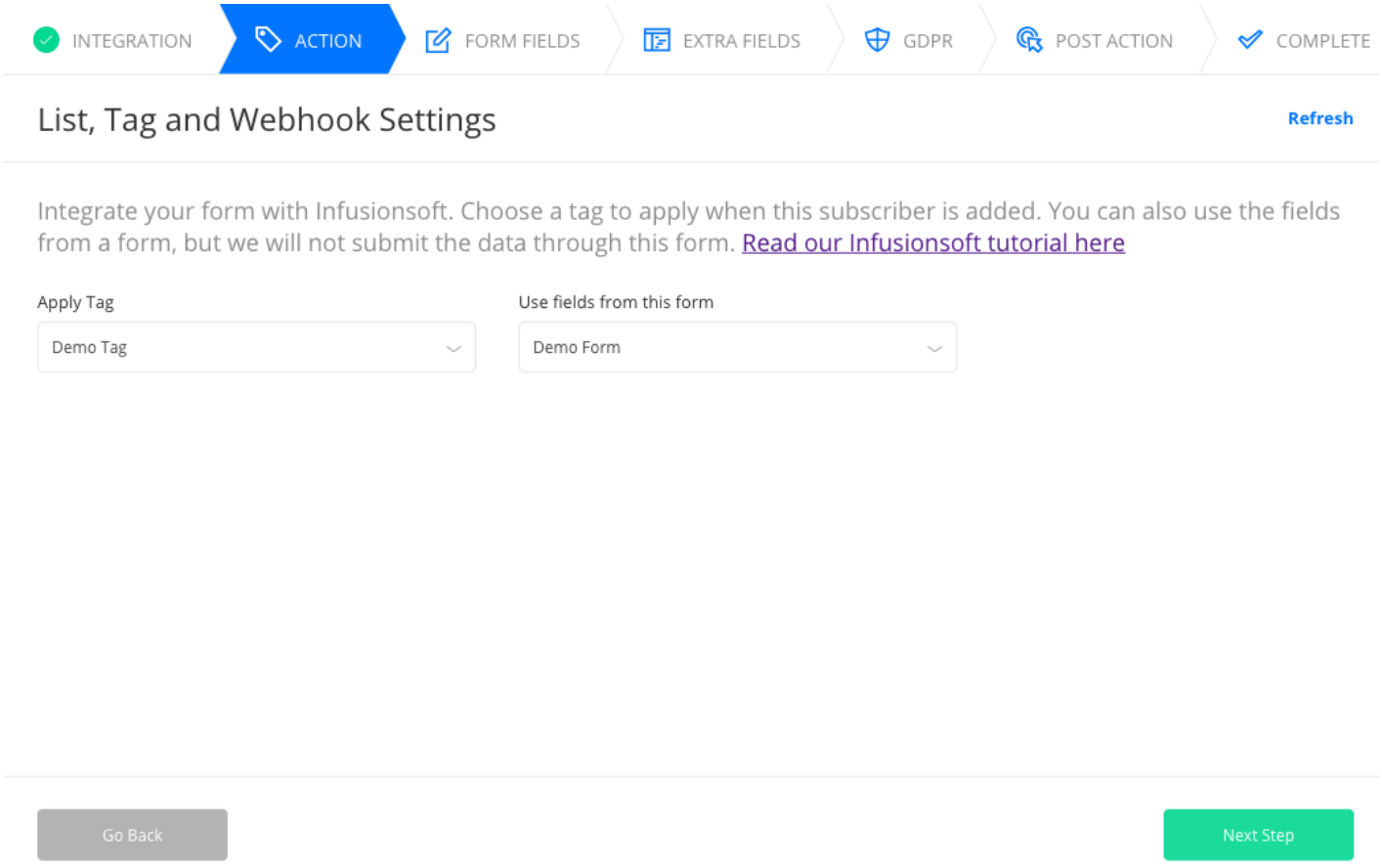
Create your automation in the campaign and publish the campaign to persist the changes.

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

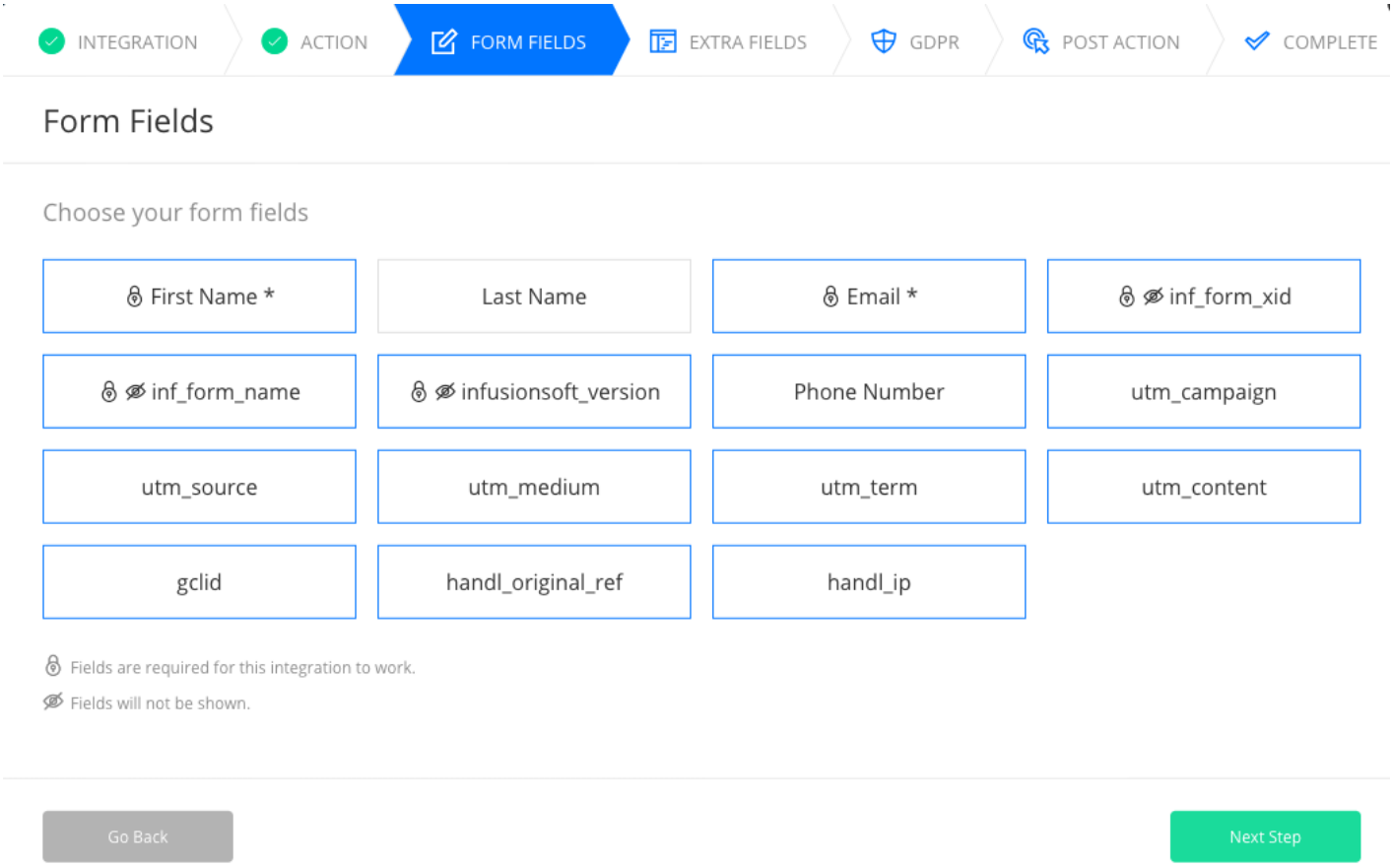
Shown in the image below



Select tag and form in Action



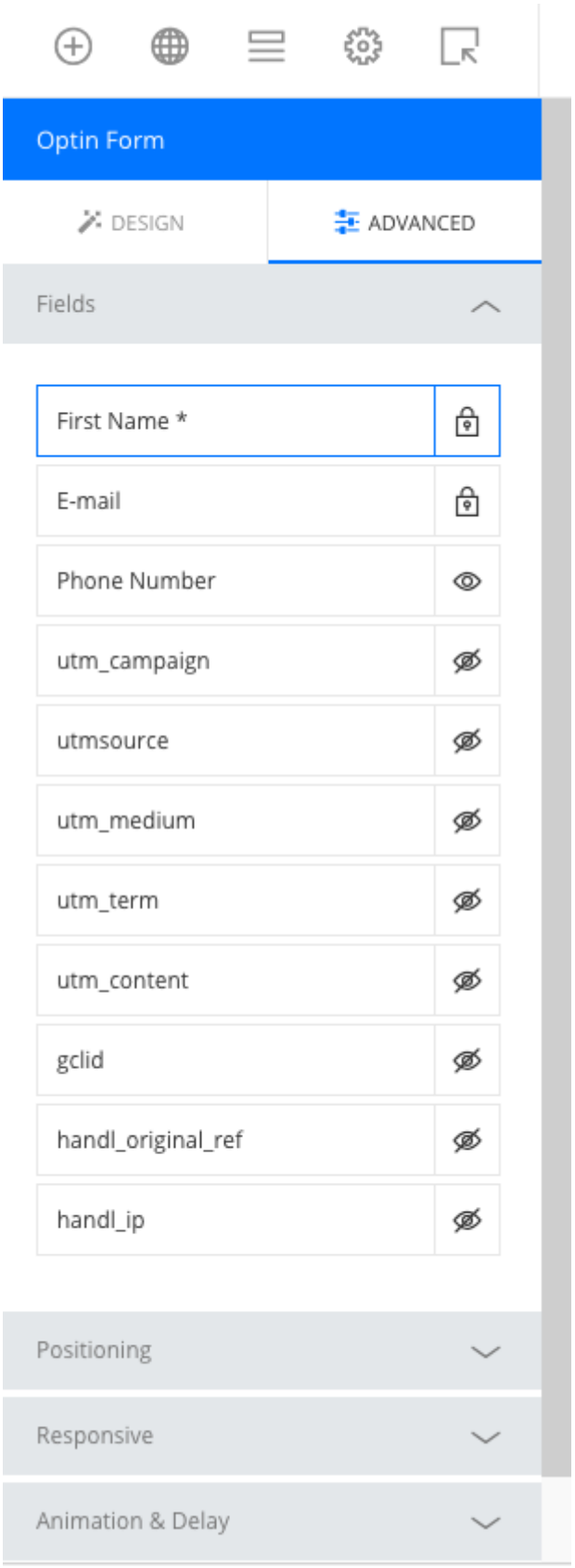
Select all the custom fields



and click next until complete

Select Optin Form > Settings > Advanced Options

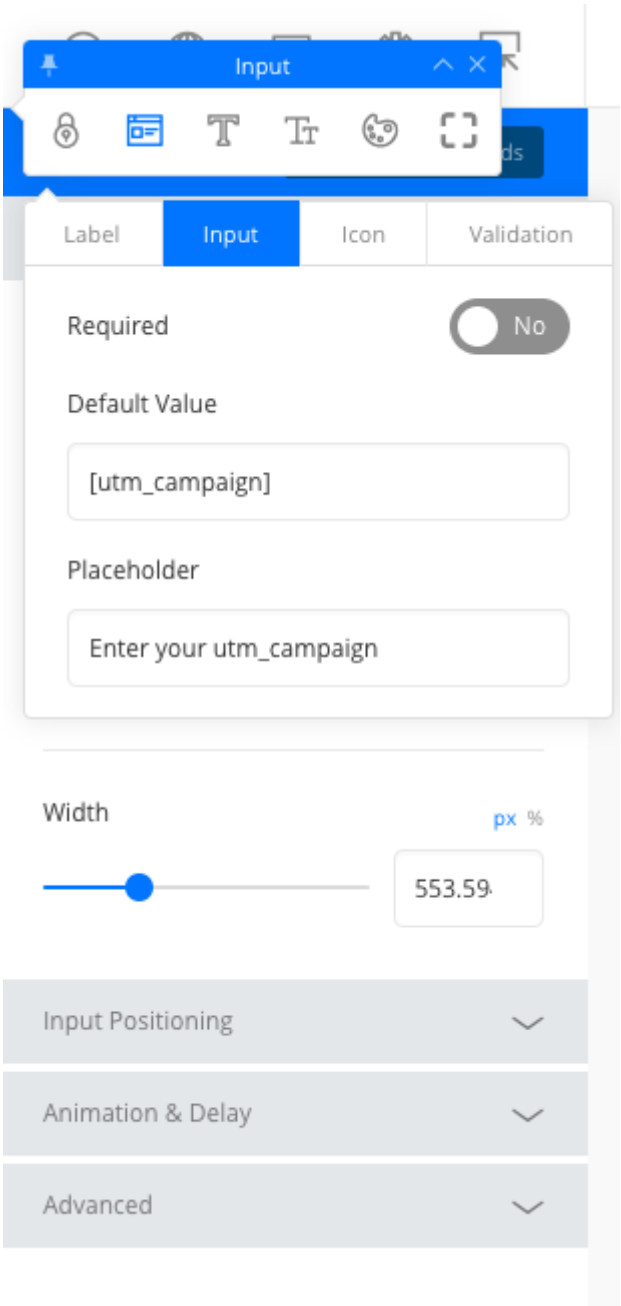
Mark the fields as invisible, they will disappear in the form visual



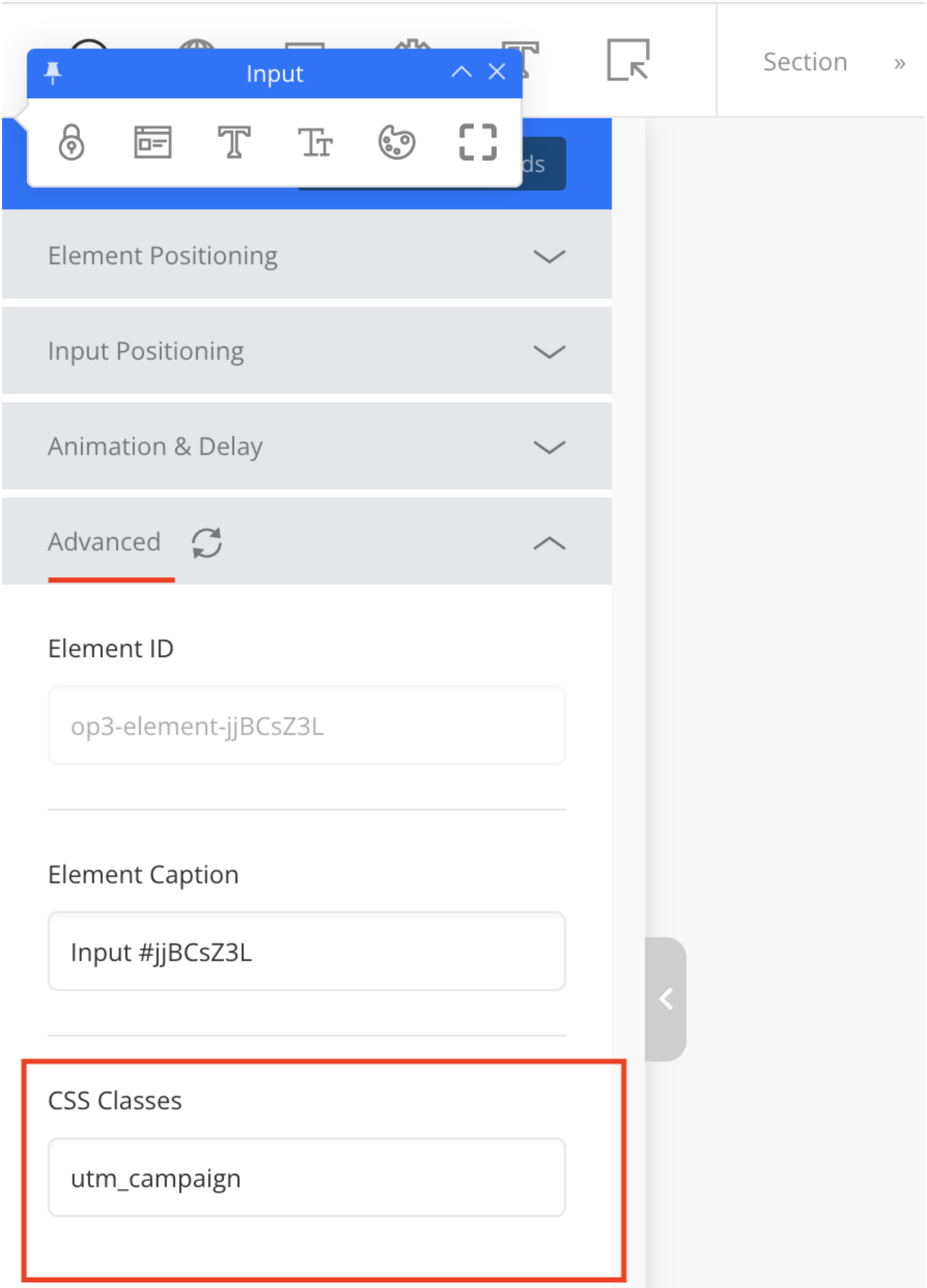
Click each input and > Input Settings > Default Value

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.



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


Input
Section
»
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!

Revision #5

Created Thu, Jan 7, 2021 6:19 AM by Leman

Updated Fri, May 31, 2024 3:30 PM by Leman