

# 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 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)

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

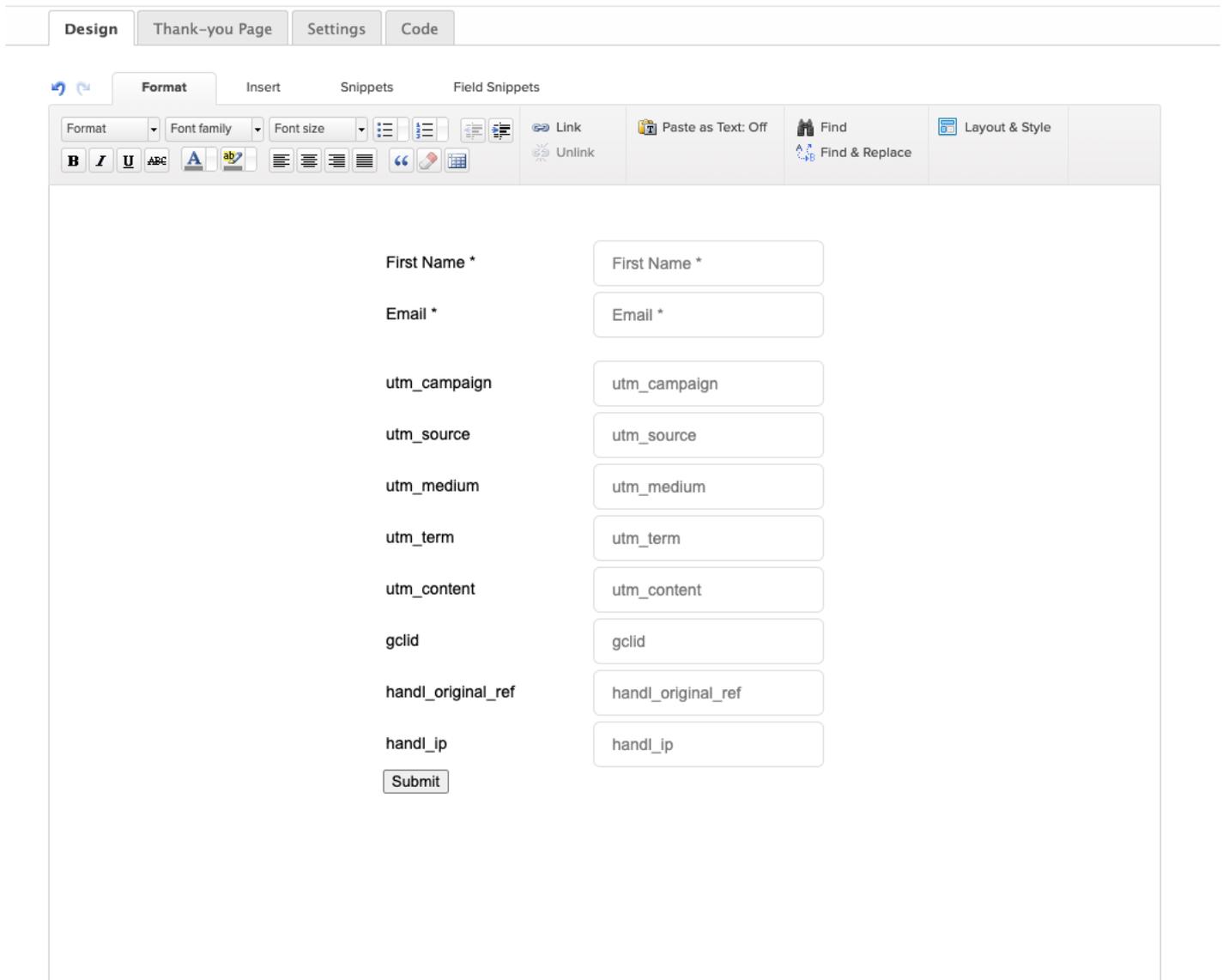
## Add the new custom fields in your form in Campaign

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.



## 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 type="checkbox"/> First Name *                           | <input type="checkbox"/> Last Name                                     | <input type="checkbox"/> Email *      | <input type="checkbox"/> <input type="checkbox"/> inf_form_xid |
| <input type="checkbox"/> <input type="checkbox"/> inf_form_name | <input 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

The screenshot shows the 'Optin Form' interface in the 'ADVANCED' tab. At the top, there are navigation icons: a plus sign, a globe, a hamburger menu, a gear, and a refresh icon. Below the title bar, there are two tabs: 'DESIGN' and 'ADVANCED'. The 'Fields' section is expanded, showing a list of fields with their respective icons:

| Field Name         | Icon           |
|--------------------|----------------|
| First Name *       | Lock           |
| E-mail             | Lock           |
| Phone Number       | Eye            |
| utm_campaign       | Eye with slash |
| utm_source         | Eye with slash |
| utm_medium         | Eye with slash |
| utm_term           | Eye with slash |
| utm_content        | Eye with slash |
| gclid              | Eye with slash |
| handl_original_ref | Eye with slash |
| handl_ip           | Eye with slash |

Below the list, there are three sections with expandable menus:

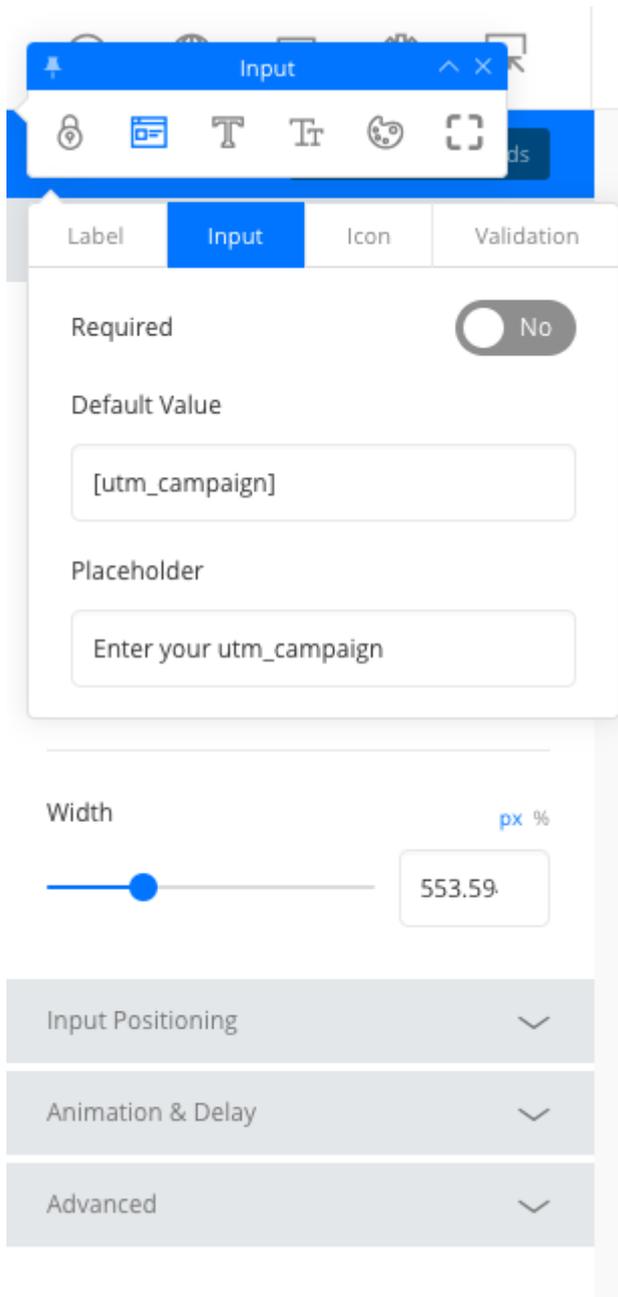
- Positioning
- Responsive
- Animation & Delay

Click each input and > Input Settings > Default Value

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

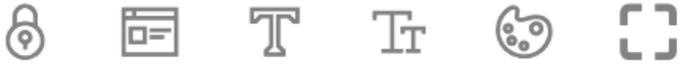
shortcodes available here [Native WP Shortcodes](#)

Below image shows for utm\_campaign, similarly you can do it for all the samples.



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

Input ^ x



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...

The screenshot shows the OptimizePress Settings interface. The 'Scripts And Styles' tab is selected. Below the tab, there is a section titled 'Enable Scripts And Styles' with a sub-heading '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.' Below this, there are two tables of plugins with checkboxes for 'Js' and 'Css' for 'Frontend' and 'Backend'.

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