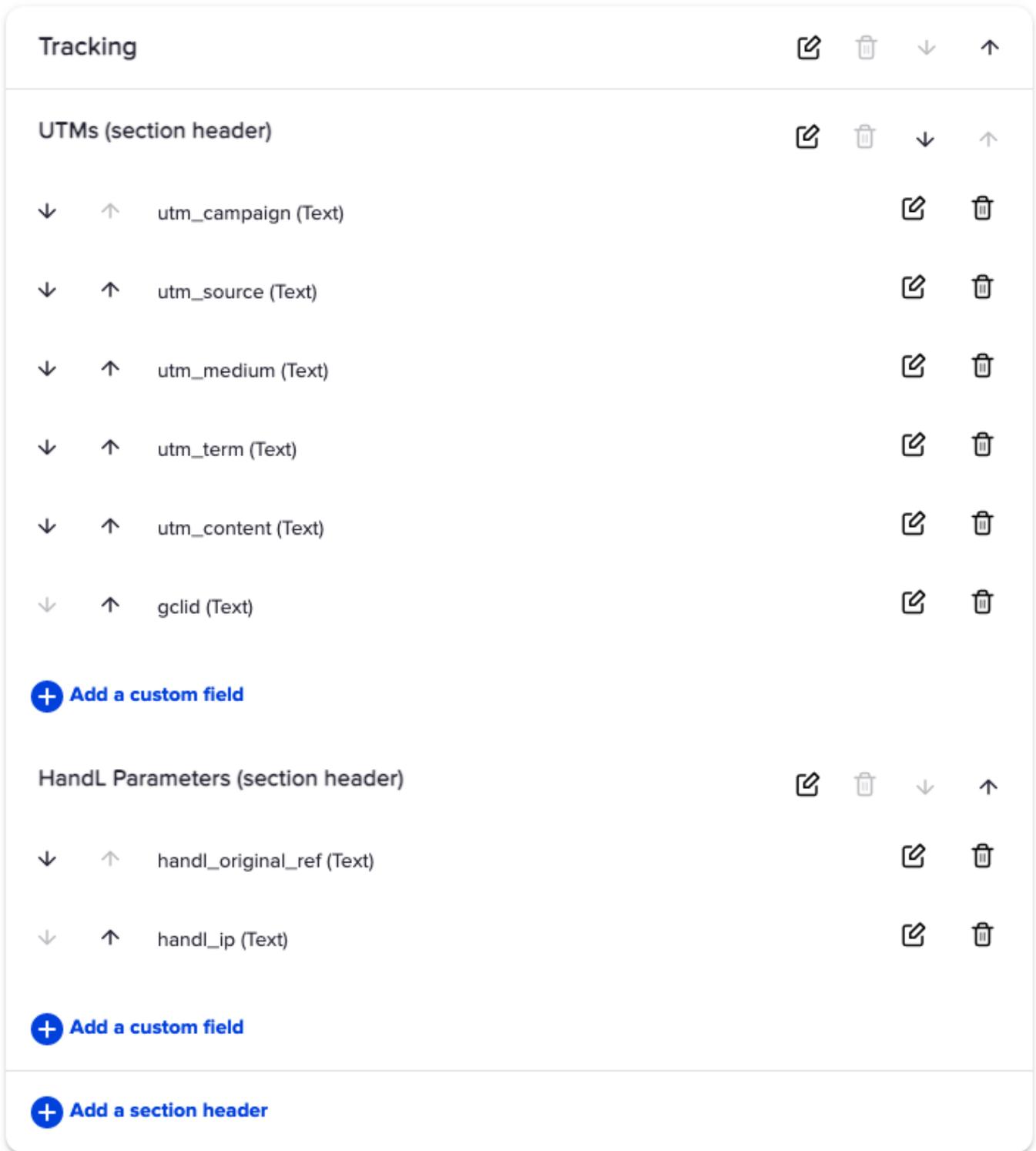


# OptimizePress and Infusionsoft Integration

## 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](#)

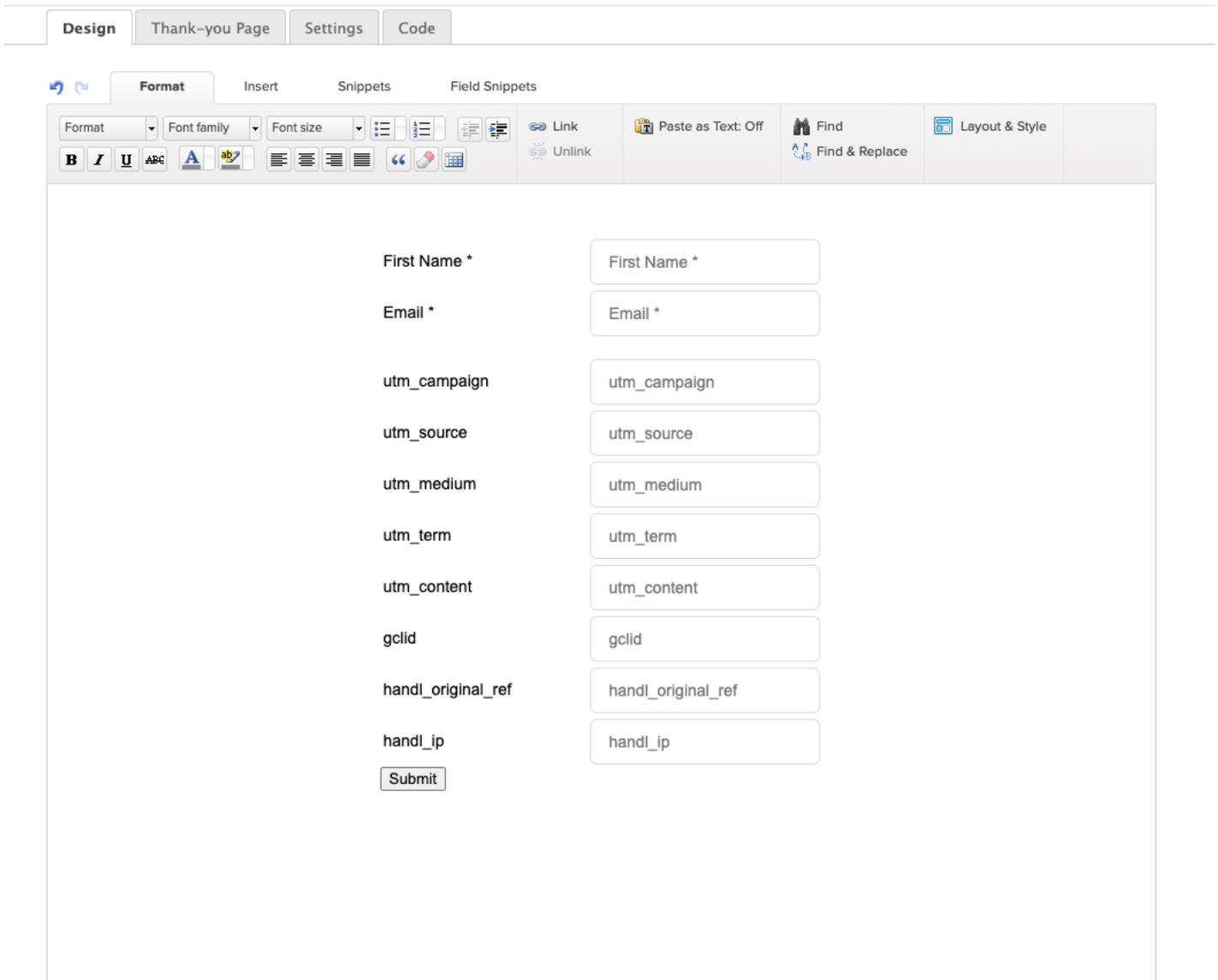
We recommend creating a separate tab called "Tracking" and using subheader to separate parameters for better visualization (shown in the image below)



## 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

Use fields from this 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

Optin Form

DESIGN ADVANCED

Fields

First Name *	🔒
E-mail	🔒
Phone Number	👁️
utm_campaign	👁️
utm_source	👁️
utm_medium	👁️
utm_term	👁️
utm_content	👁️
gclid	👁️
handl_original_ref	👁️
handl_ip	👁️

Positioning

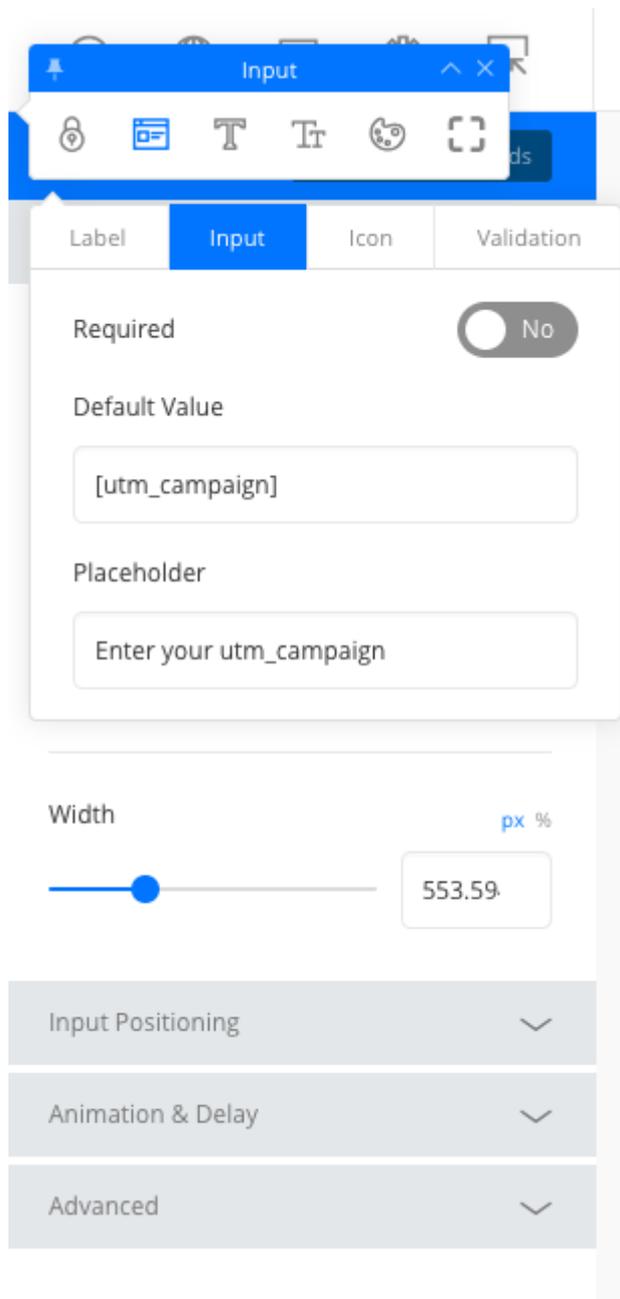
Responsive

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.



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

Input ^ x

🔒 📄 T It 🧠 🖱

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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Revision #5

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