
Gravity Forms – Infusionsoft Integration

Installation

WordPress Dashboard

- Go to 'Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Activate plugin.

WordPress Multisite Network Dashboard

- Go to 'Network Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Only install plugin zip in 'Network Admin' and do not activate it.
- Activate plugin site wise ('Site' -> 'Admin' -> 'Plugins').

Configuration

- Go to 'Admin' -> 'GF – Infusionsoft' -> 'Configuration'.
- Register App in Infusionsoft to get Client ID and Client Secret. The guide is below.
 - Create an Infusionsoft Developer Account and register your App. [Create an Account](#).
 - Click on [Apps](#).
 - Click on "+ NEW APP".
 - Add App Name and Description.
 - APIs: Enable it.
 - Click on "CREATE" button.
- Client ID: Add your Infusionsoft Developer Account App Client ID.

- Client Secret: Add your Infusionsoft App Developer Account Client Secret.
- Click on 'Authorize' button.
- You can see Infusionsoft login page if not logged in Infusionsoft. If not logged in Infusionsoft, login to Infusionsoft.
- Click on 'Allow' button.

Integration

- Go to 'Admin' -> 'GF - Infusionsoft' -> 'Integration'.
- You can see list of Gravity Forms forms.
- Click on edit form icon which you want to integrate form.
- Select a Infusionsoft object you want to integrate with current form.
- Click on 'Filter' button to filter object fields.
- Check 'Infusionsoft Integration?' checkbox if you want to integrate Infusionsoft.
- Select 'Create Object Record' or 'Create/Update Object Record' action event.
 - Create Object Record: On form submitted, it will add record.
 - Create/Update Object Record: If form submitted email address match with existing record, it will update record. If form submitted email address not match with existing record, it will add record.
- Map Gravity Forms form fields to Infusionsoft object fields.
Below object wise fields are required in the Infusionsoft and it must be mapped with Gravity Forms form fields.
 - Contact: Email. If map State field, Country field is required and Country field accept country code and not name. It's accept like USA, AU, IN, GBR etc...

For 'Relationship' type field (Owner ID), create hidden field in the form and map it with 'Relationship' type field.

- For Contact Owner, create hidden field in the form with value Contact Owner ID.

Tags: Create hidden field in the form and add Tag IDs by comma separated. Like 91,92,93,etc... Once created, map it with Tags field. Under your CRM menu, click on Setting and then on the left, click on Tags. The ID's for the tags listed are on the left of the resulting tags.

For “Opt-in or mark a Contact as Marketable”: You may opt-in or mark a Contact as Marketable by the opt_in_reason field with an opt-in reason. Example reasons: “Customer opted-in through webform”, “Contact gave explicit permission.”. Like add hidden field in form with reason and map it with Infusionsoft Opt-in Reason field. Also, unmapped “email opted-in” field.

- Click on ‘Save Changes’ button.

API Error Logs

- Go to ‘Admin’ -> ‘GF – Infusionsoft’ -> ‘API Error Logs’.
- You can see Infusionsoft API error logs.

Settings

- Go to ‘Admin’ -> ‘GF – Infusionsoft’ -> ‘Settings’.
- API Error Notification: Add ‘Subject’ and ‘Send To’. Will be sent Infusionsoft API error to the specified email.
- Delete data on uninstall?: Check ‘Delete data on uninstall?’ checkbox if you want to delete this plugin data on uninstall.