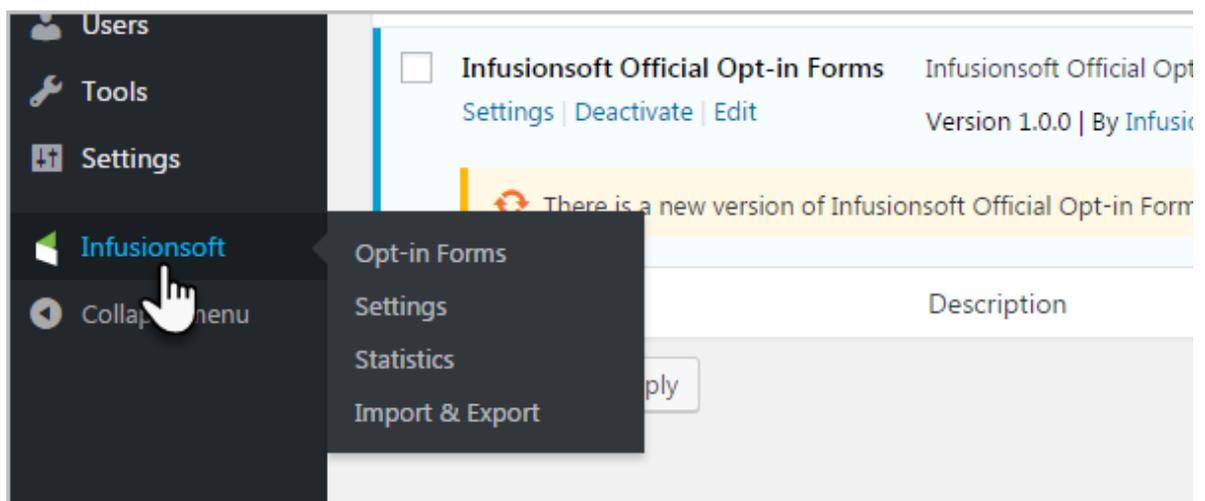


Create a WordPress opt in form

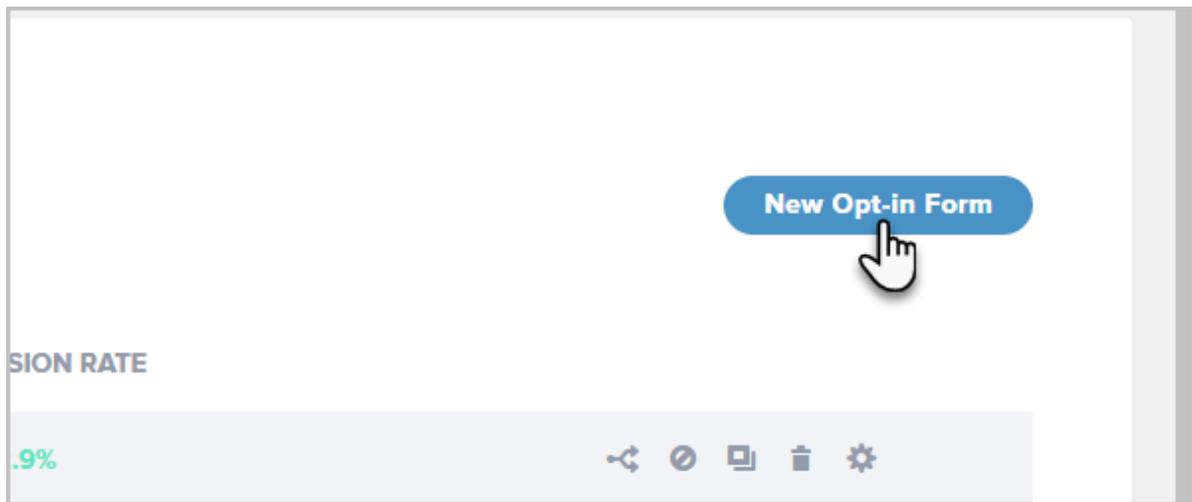
Clicking on the **Opt-In Forms** in the sidebar will give you access to create and manage your opt-in forms as well as:

- View all existing opt-in forms (active and inactive)
- View high-level statistics for all existing forms
- Create new opt-in forms
- A/B test two existing opt-in forms
- Deactivate existing forms
- Duplicate existing forms
- Delete existing forms
- Make changes to existing forms

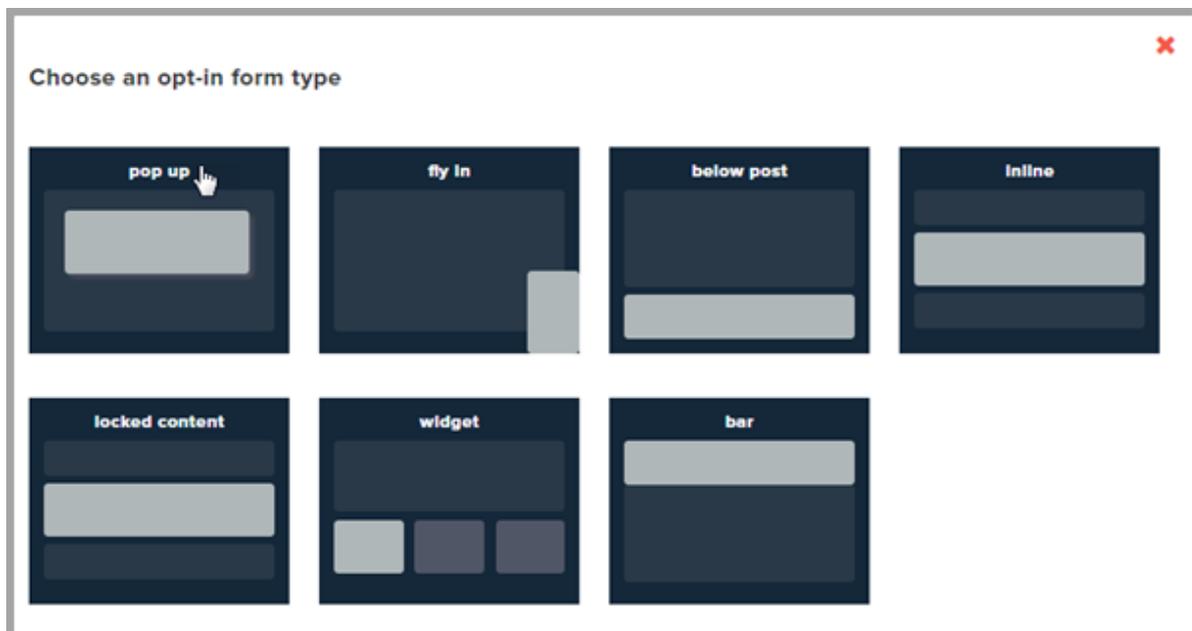
1. Click on the **Infusionsoft** link to expand the sidebar and click **Opt-in Forms**



2. Click on the **New Opt-In** button on the top right corner of the page from the **Opt-In Forms** sidebar tab



3. Choose what type of opt-in form you would like to use:



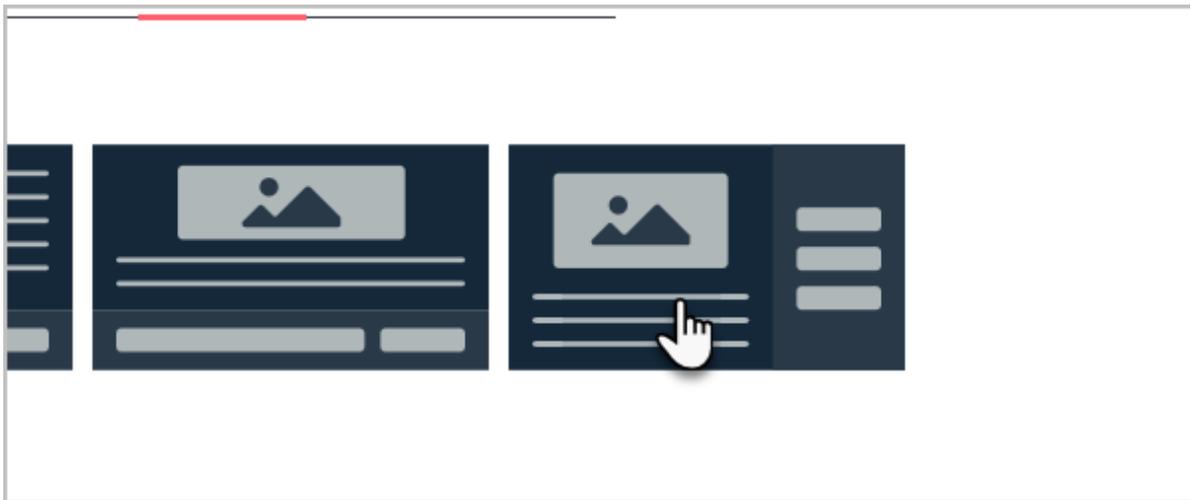
- **Pop Up Opt-In Form:** Prompt your visitors to opt in without annoying them. You can set Infusionsoft's Opt-In Forms to appear automatically after a specific amount of time, after visitors reach a particular point on your page, or even after visitors leave a comment or make a purchase.
- **Fly In Opt-In Form:** The slide-in form is the pop-up's smooth, subtle cousin. It slides in at the bottom of your visitor's screen and can be set to appear after a specific time or at a specific point on the page.
- **Widget Opt-In Form:** Use widget forms to create attractive opt-in forms for your sidebar, footer, or any other widget-friendly areas on your site.
- **Locked Content Opt-In Form:** Offering valuable content in exchange for an email address is one of the most effective ways to grow your email list.

Protected content forms allow you to offer content your visitors can “unlock” by opting in. *Locked content will need to be placed between* `[inf_infusionsoft_locked optin_id="optin_#"]` and `[/inf_infusionsoft_locked]`

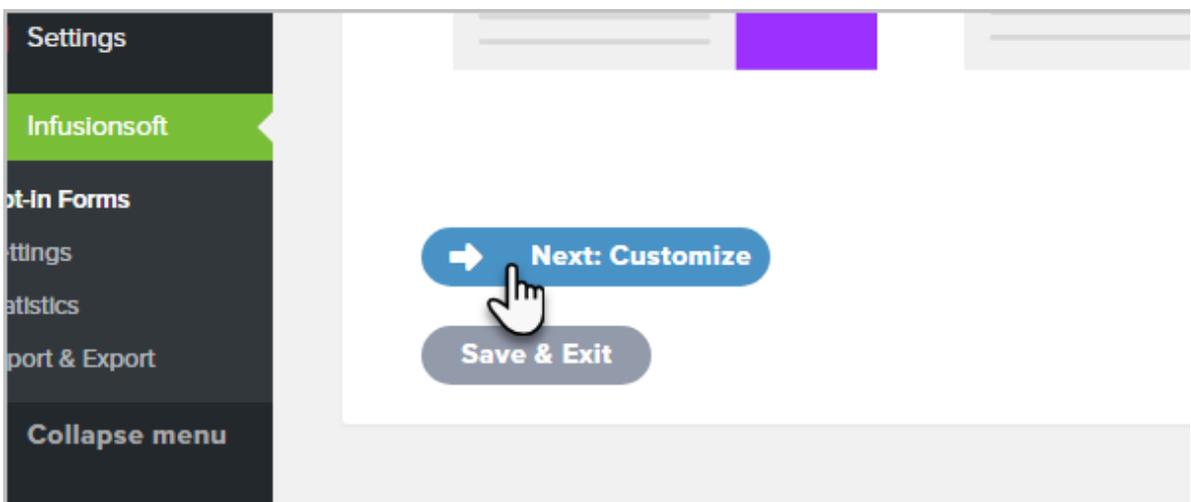
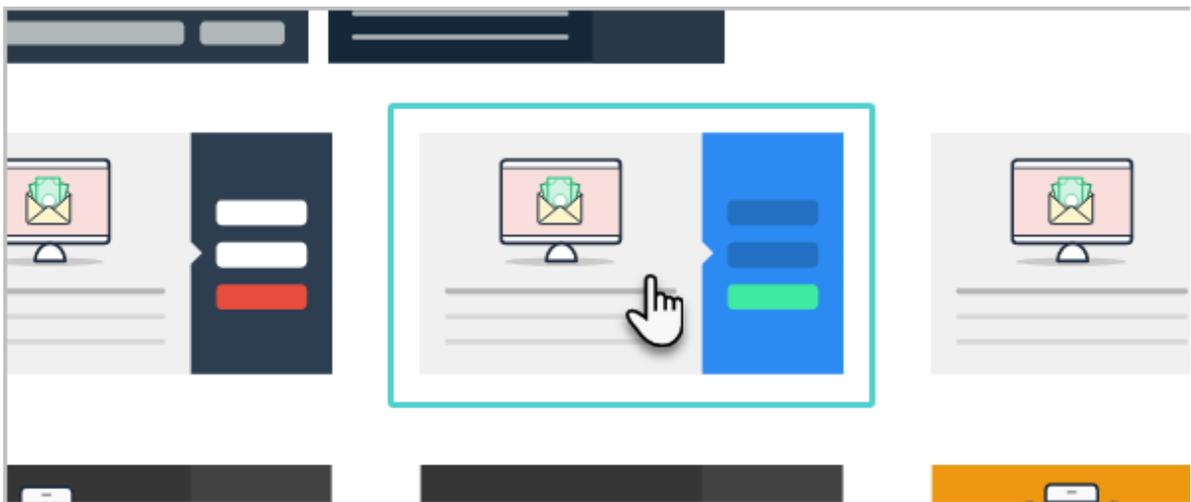
- **Below Post Opt-In Form:** You can use “Below Content” forms to place an opt-in opportunity at the end of your blog posts or pages. Visitors who have read an entire post are highly engaged, so this is an effective way to turn that engagement into a conversion.
 - **Inline Opt-In Form:** Want to insert an opt-in form in the middle of a blog post, rather than the end? Inline forms make it easy. You can display these forms virtually anywhere you’d like on any post or page on your website.
 - **Notification/Opt-In Bar:** Increase your opt-ins, announce your promotions and drive traffic to the pages of your choice with our attention grabbing top-of-page banner.
4. Enter a name for your opt-in form then click the **Next: Design** button to advance to styling your opt-in form or click the **Save & Exit** button to save the opt-in and return later to edit its design & display settings



5. Choose one of the form layouts then click the blue **Next: Customize** button at the bottom



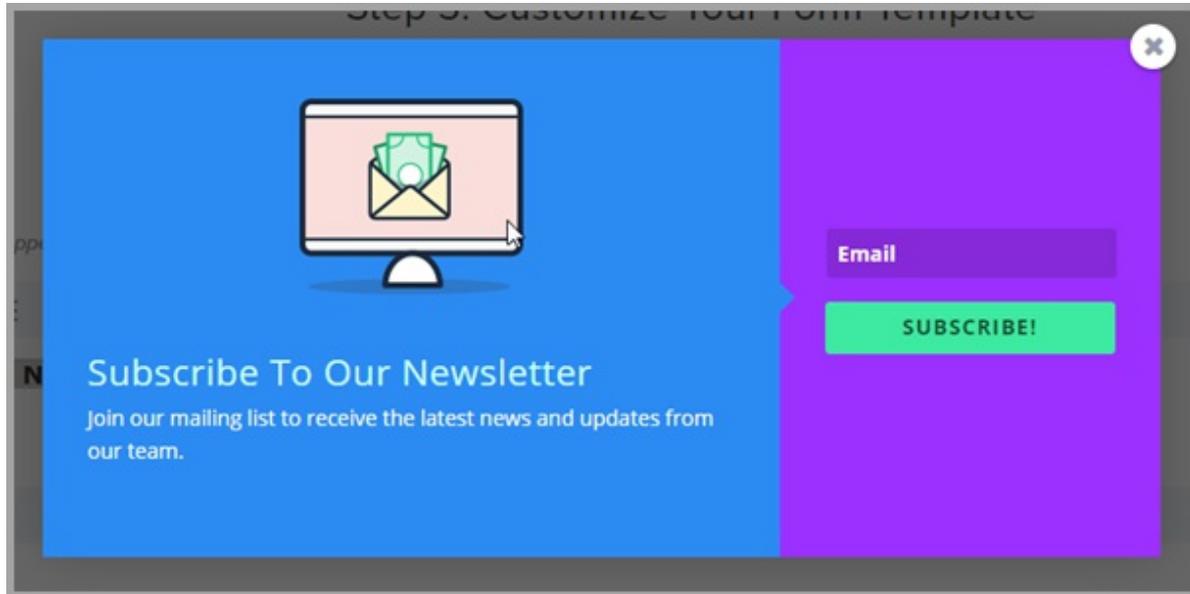
6. Choose one of any pre-designed templates based on preferred color and style. You can alter these colors after a template has been selected. Once you select a template, you will automatically be taken to the bottom of the screen to click the blue **Next: Customize** button to advance to the next part of customization.



7. This next part of the design process allows you to access the next layer of

customization. At this time only First name, Last name and Email address may be added to forms. Email Address is always required.

8. Click the **Preview** button at the top right of the page as you make style changes to view your progress



9. After customizing the above settings, you can click the blue **Next: Display** button to customize more elements.
 10. Where to display the opt-in form. Note that the fields below these check-boxes are dynamic according to display options chosen
 - o Everywhere on site
 - o The home page
 - o Archives page
 - o Certain page or post categories
 - o With specified shortcode tags
 - o Specified pages
 - o Specified posts
 11. Once you have customized the above settings, you have completed the form setup process! To finalize, you must click the gray, **Save & Exit** button at the bottom of the Display Settings tab. After successfully configuring/customizing your opt-in form, you will be taken back to the Opt-In Forms tab and your newly created opt-in form will display in the list of opt-in forms. This list can be delineated should you make some opt-in forms inactive (see below.)
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