Free Resource Campaign

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Free Resource campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a web form where people can request a copy of an online resource. Upon form submission, the contact will receive an email with a download link for the resource and they will be tagged accordingly if they actually download it. This campaign can be used with any type of resource: a spreadsheet, slideshow, etc. You will need the resource hosted somewhere online that is publicly accessible.

1. Download the Free Resource campaign from the Marketplace

2. Set up the Campaign Field and Campaign Link

   This campaign delivers a free resource when someone requests it. In this part, you tell the campaign the title of the resource and where it lives.

   1. In the upper left of the page, click on the Campaign drop-down and then click on Merge Fields.
   2. Click the pencil icon next to the Resource Title to edit the merge field value.
   3. Insert the name of the resource and click the Save icon.
   4. Click on Close in the lower right corner of this menu to close it.
   5. Click on the Campaign drop-down again and click on Links.
   6. Click Edit to change the Resource URL.
   7. Update the placeholder URL with the actual online location of the resource and click Save.
   8. Click on Close in the lower right corner of this menu to close it.

3. Customize the Web Form

   In this part, we simply update the opt-in form with your resource title.

   1. Double click on the Free Resource Request goal.
   2. In the Title snippet, update the placeholder name with the actual name.

3. If you want to receive a notification when someone opts in, click the Settings tab at the top. In the Notification Email section, insert the email address you want to receive notifications.
4. In the upper right of the page, click on Draft to change the form's status to Ready.
5. Click on Back to Campaign in the upper left of the page.

4. Publish the Campaign

   All items on this campaign by now should look light green/grayed out (like the Free Resource Request goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

5. Put Request Form on Your Site

   Your request form is now is ready to go! You just need to grab the form's web code and put it on your site. After publishing a campaign, the builder will take you to Performance Mode view.

   1. Click on the Edit tab in the upper left of the page just below the Back to List button.
   2. Double click on the Free Resource Request web form goal
   3. After the form opens, click on the Code tab towards the top middle of the page.
   4. In the Do It Yourself section, copy the JavaScript Snippet code; this is the actual code for the form itself.
   5. Publish this form code on a page (or pages) of your website. You now have a way to quickly and easily capture leads on your website!