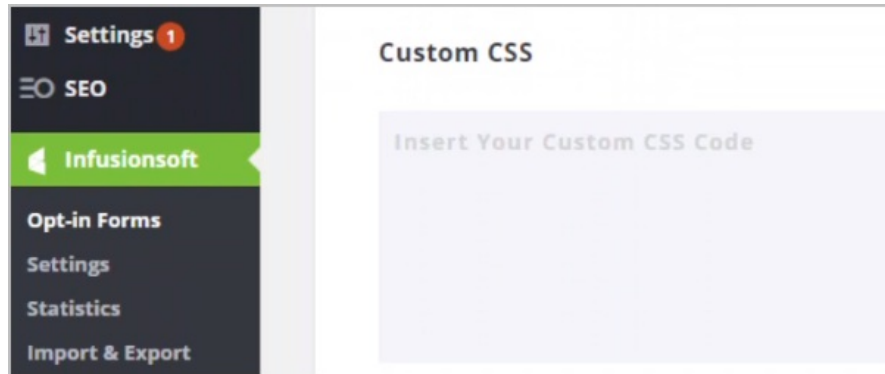


Create a WordPress Opt-In Form

This article applies to:

Before starting, complete [WordPress Plugin set-up](#), and identify where and how you want the opt-in form to show up on your web page, and what type of information that you want to capture from your web site visitors.

1. Log into your WordPress account and click **Infusionsoft** in the menu to expand the sidebar, then click **Opt-in Forms**.

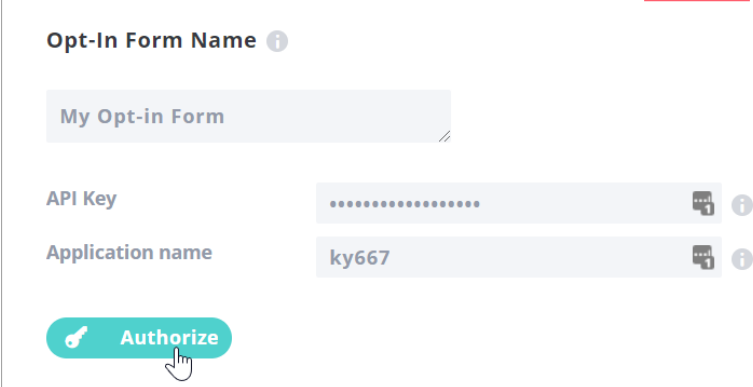


2. Click **New Opt-In Form** at the top right corner of the page.
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3. Based on how you want your opt-in form to function on your web page, choose a type of opt-in form. Descriptions are below.
 - - **Pop up**: Prompt visitors to opt-in by setting the form to appear either after a specific amount of time, when scrolling to a specific point on your page, after leaving a comment, or when they make a purchase.
 - **Fly in**: This is the pop-up's smooth, subtle cousin. Set it to fly in at the bottom of the screen either after a specific amount of time, or when scrolling to a specific point on your page.
 - **Below post**: Place the opt-in at the end of your page. Visitors who have read an entire post are highly engaged, so this is an effective place to provide the opt-in.
 - **Inline**: Insert the opt-in form in the middle or virtually anywhere on your web page.
 - **Locked content**: Offering valuable content in exchange for an email address is an effective way to entice an opt-in. Offer content that your visitors can unlock by opting in. *Locked content is placed between `[inf_infusionsoft_locked optin_id="optin_#"]` and `[/inf_infusionsoft_locked]`*
 - **Widget**: Create opt-in forms for your sidebar, footer, or any other widget-friendly areas on your site.
 - **Bar**: Announce promotions and drive traffic to pages of your choice with our attention grabbing, top-of-page banner.

4. Enter a name for your opt-in form and click the **Next: Design** button.

□

5. Enter your Legacy API Key, and App ID and click Authorize.



The screenshot shows a configuration window titled "Opt-In Form Name". It contains three input fields: "Opt-In Form Name" with the value "My Opt-in Form", "API Key" with a masked value ".....", and "Application name" with the value "ky667". Each field has an information icon to its right. At the bottom, there is a green "Authorize" button with a key icon and a mouse cursor pointing to it.

6. Choose a form layout, then click the **Next: Customize** button at the bottom.

□

7. Choose a template. You can alter the colors after selecting a template.

□

8. Click **Next: Customize**.

□

9. Here you can add the fields that you want to capture with your opt-in form. Email Address is always required.

10. Click the **Preview** button at the top right of the page to view your design progress.

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11. Click **Next: Display** to customize more elements.

12. Select where to display the opt-in form. Options include:

- Everywhere on site
- The home page
- Archives page
- Certain page or post categories
- With specified shortcode tags
- Specified pages
- Specified posts

13. Once you have completed the form setup process. Click **Save & Exit** at the bottom of the Display Settings tab. Your new form is now visible in the Opt-In Forms tab. You can repeat this process to create more opt-in forms for your web site, if needed.

Next, you have the option to install the [Infusionsoft Landing Pages Wordpress plugin](#).
