Cheatography

WisP - Membership Plugin Cheat Sheet

by tanay via cheatography.com/20584/cs/3319/

Step 1. Wordpress Installation

1. Log into your Infusionsoft app, and create a Custom Field (Text) called WisP
2. Download the plugin.
3. Install the plugin, navigate to WisP on your WordPress left hand sidebar.
4. Plugin your details: Email, License Key, Infusionsoft App, and API key.
5. From the custom field dropdown box, select "WisP" as your custom field.

Keep default settings, and save your HTTP POST Key handy for the next step.

Step 2. Infusionsoft Campaign

1. Log into your IS app.
2. Create a Tag "Grant access to Website".
3. Head to Campaign Builder.
4. Create New Campaign.
5. Drag in a Goal "Applies a Tag". Keep the trigger as the new Tag you created.
6. Drag in a new Sequence and link it to the first goal.
7. In the sequence, drag in an HTTP POST.
8. Configure the HTTP POST as in this image
9. All fields are CASE SENSITIVE, create them as is!! This is the most likely place for all errors.
10. Create another sequence and configure your welcome email to your users. Make sure you include the following fields in the email -

Username: Contact.Email

Password: Contact._WisP

Here's an image for reference

11. Here's what your Campaign should look like now.
12. Head in, mark all items Ready, and Publish. All those should become Dark Green.
13. You're done with Infusionsoft setup!

Just so that it becomes easier to copy paste, here are all the HTTP POST parameters - please watch your case!

ContactId
accesskey
Email
ResetPassword
PassLength

Step 3. Setup an access locked page

1. Log into your Infusionsoft account.
2. Create your membership tags (for this example, let's call them Silver and Gold)
3. Note down the Tag IDs. For now, let's assume they're

Silver = 101

Gold = 102

4. Create a new Page.

Step 4. Configuring Access

On this new page, copy paste the following code:

Code

```
[WisP level="not_logged_in"] Hello there.
This content is exclusively for our
customers.
To continue, please login using the form
below.
[loginform]
[/WisP]
[WisP level="logged_in"]
Hi [WisP contactfield="FirstName"]!
Thanks for logging in.
[/WisP]
[WisP tag="101"]
You've purchased the Silver level member-
ship. This text is visible to all Silver Tag
users.
[/WisP]
[WisP tag="102"]
You've purchased the Gold level member-
ship. This text is visible to all Gold Tag
users.
[/WisP]
```

Commonly Used Shortcodes

Commonly Used Shortcodes (cont)

[WisP GoalAction="CALL-NAME" Button-Text="Start Goal"] <- For the logged in contact, will kickstart the Infusionsoft Campaign called "CALL-NAME"

Multi Tags

A Test Case On Multi Tags

Suppose our Infusionsoft application has 4 tags, A, B, X, Y

And there are 2 users, User1, User2.

User1 : Tags A, B

User2: Tags X, Y

[WisP multi_tag="A,B" multi_notag="X,Y"] User 1 will be able to see this [/WisP]

[WisP multi_tag="X, Y" multi_notag="A, B"] User 2 will be able to see this [/WisP]

[WisP multi_tag="A" multi_notag="X,Y"] User 1 will be able to see this [/WisP]

[WisP multi_tag="X" multi_notag="A,B"] User 2 will be able to see this [/WisP]

[WisP multi_tag="A,B,X,Y"] None of them can see this [/WisP]

[WisP multi_notag="A,B,X,Y"] None of them can see this [/WisP]

Multi OR Tags

A Test Case On Multi OR Tags

Suppose our Infusionsoft application has 4 tags, A, B, X, Y

And there are 2 users, User1, User2.

User1 : Tag A

User2: Tag B

[WisP multi_or_tag="A,B"] Both users see this text[/WisP]

[WisP multi_or_tag="A,X"] User 1 will be able to see this [/WisP]

[WisP multi_or_tag="B,Y"] User 2 will be able to see this [/WisP]

[WisP multi_or_tag="X,Y"] None of them can see this [/WisP]

[WisP level="logged_in"] Text visible to logged in members [/WisP]

[WisP level="not_logged_in"] Text visible to not logged in members [/WisP]

[loginform] <- Generates a WisP Login Form

[WisP tag="123"] Only IS users with Tag ID 123 will be able to see this text. [/WisP]

[WisP notag="123"] IS Users without Tag 123 will see this. [/WisP]

[WisP logouttext="Log Out" redirect="ht-tp://disney.com"] <- Logs the user out and sends them to specified URL.

[WisP posttype="postid" postvalue="123"] <- Embeds PostID 123 inside this page.

By **tanay**
cheatography.com/tanay/

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