How to Integrate FluentCRM in WordPress with Paymattic

Integrations · https://paymattic.com/docs/how-to-integrate-fluentcrm-in-wordpress-with-paymattic/

Paymattic allows you to connect with FluentCRM a WordPress-based self-hosted email marketing automation plugin that helps you to add new prospects to your FluentCRM contact list when a form is submitted. This article will guide you through integrating **FluentCRM** with **Paymattic** on your WordPress Site.

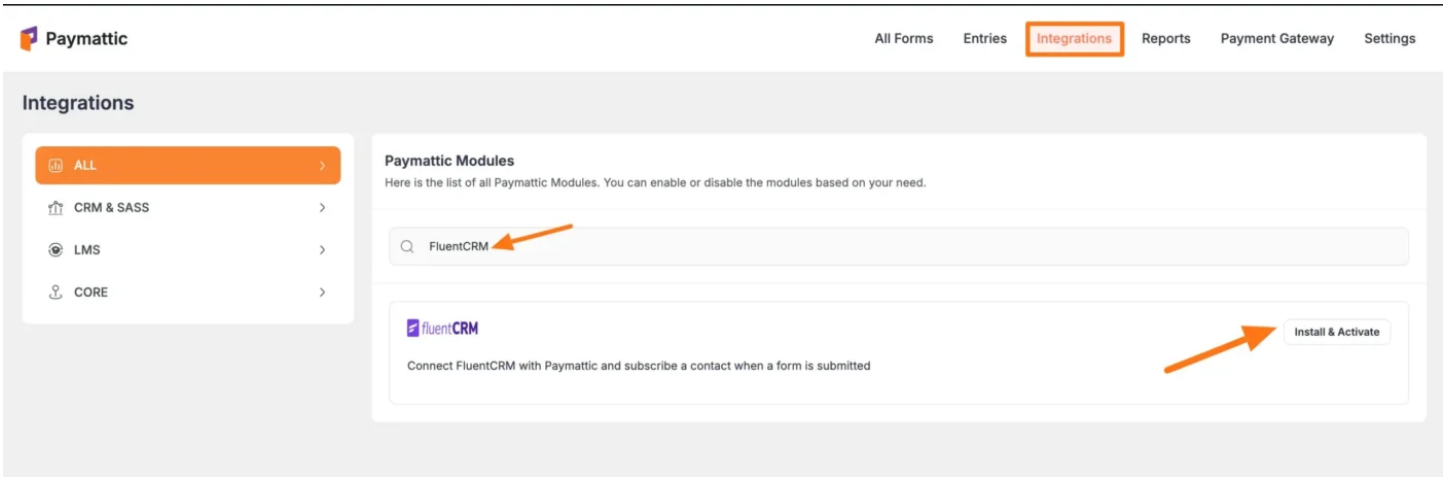
Enable FluentCRM Integration

To learn how to enable FluentCRM integration, follow the steps with screenshots below –

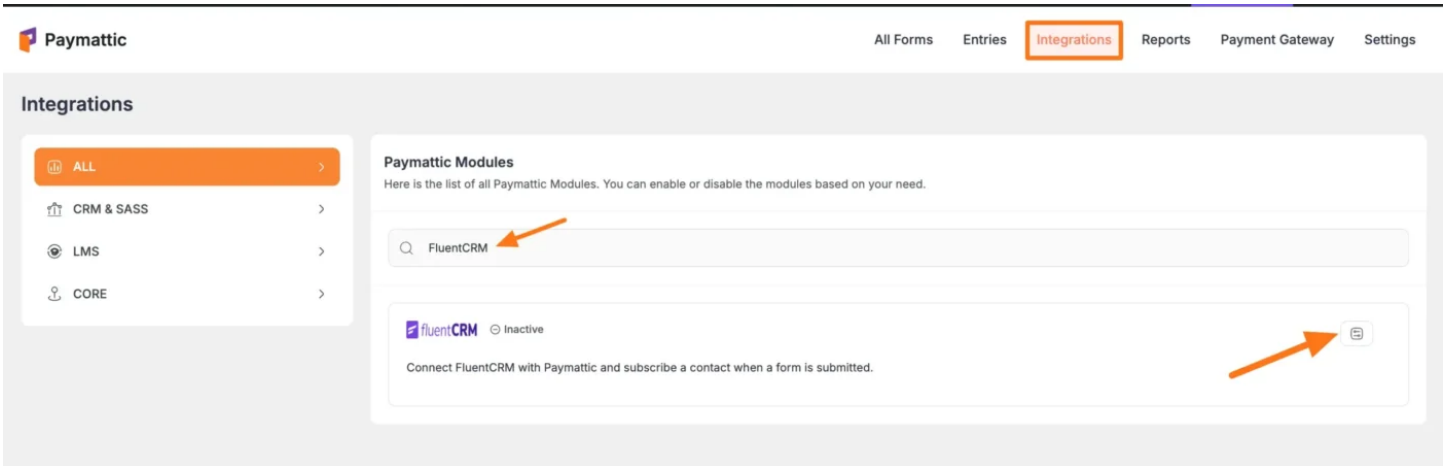
First, go to **Integrations** from the **Paymattic Navbar**, search for **FluentCRM** through the search bar, and you will get the **FluentCRM** integration module.

Before starting the process, ensure you **Installed** and **Activated** the **FluentCRM Plugin** in your WordPress Site.

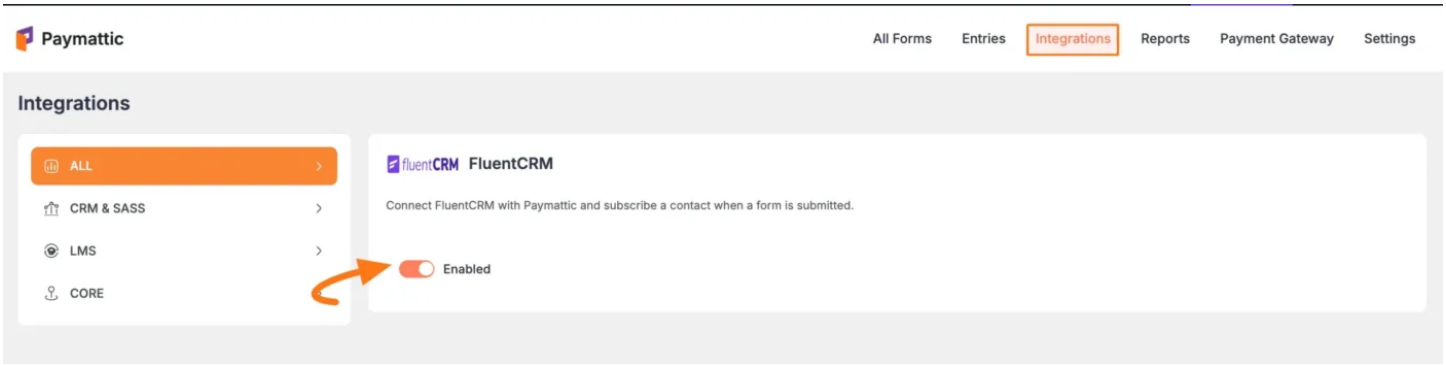
To learn how to install & activate FluentCRM Free/PRO Version read this Documentation.



Once you successfully install & activate the **FluentCRM** plugin in your WordPress Site, you will get the FluentCRMt's **Settings Icon** on the right side, click on it.



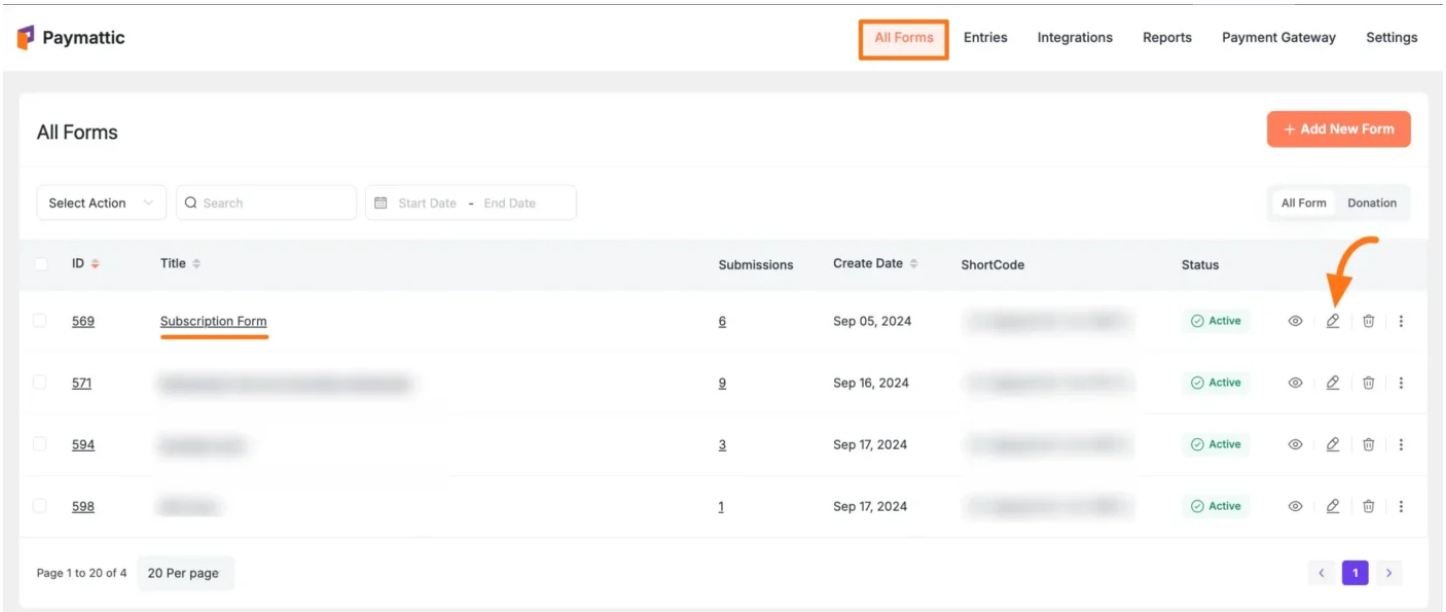
Click the **Toggle** button and your **FluentCRM** integration module will be enabled.



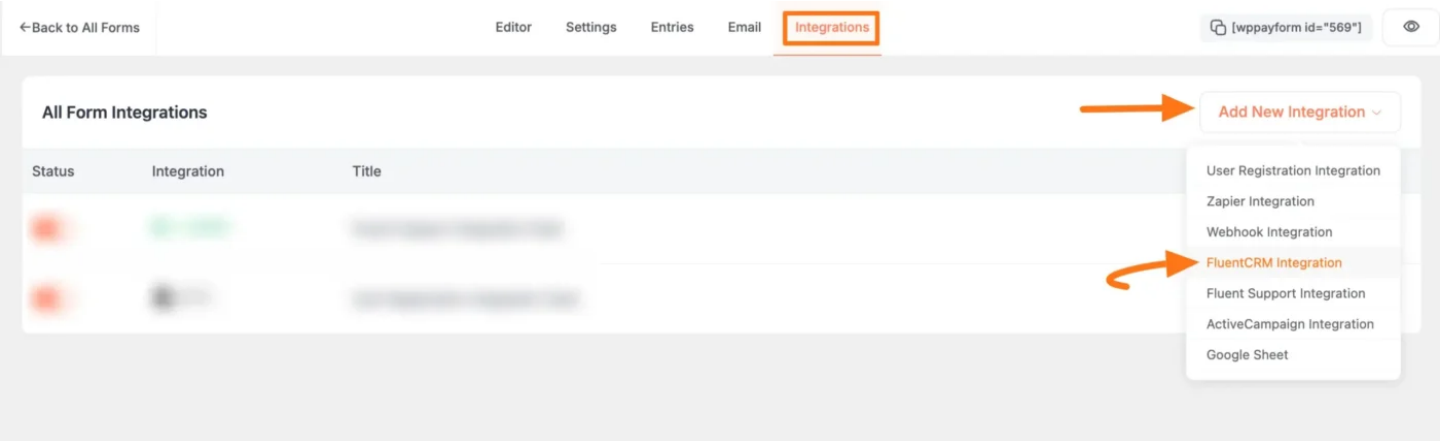
Integrate FluentCRM into Paymattic Forms

To learn how to integrate FluentCRM into any specific Form in Paymattic, follow the steps with the screenshots below –

First, go to **All Forms** from the **Paymattic Navbar**, **select** the **Desired Form** where you want to integrate **FluentCRM** and click the **Pencil/Editor Icon.**



Once the **Editor** page opens, go to the **Integrations** tab, click the **Add New Integration** button & select **FluentCRM Integration** feed from the dropdown list.



Now, a pop-up page will appear with various settings options for configuring FluentCRM.

All the settings options mentioned in the screenshot below are briefly explained:

- **Feed Name**: Here, you can set a name according to your preference for your feed. This field is required to be filled in.
- **FluentCRM List**: This is a required field where you select the FluentCRM list to add new contacts to. By default, you can select a single list from the dropdown menu. All users who submit the form

will be added to this list. Alternatively, you can enable the **Conditional List Selection** toggle to add contacts to different lists based on their specific form inputs. To configure the conditions:

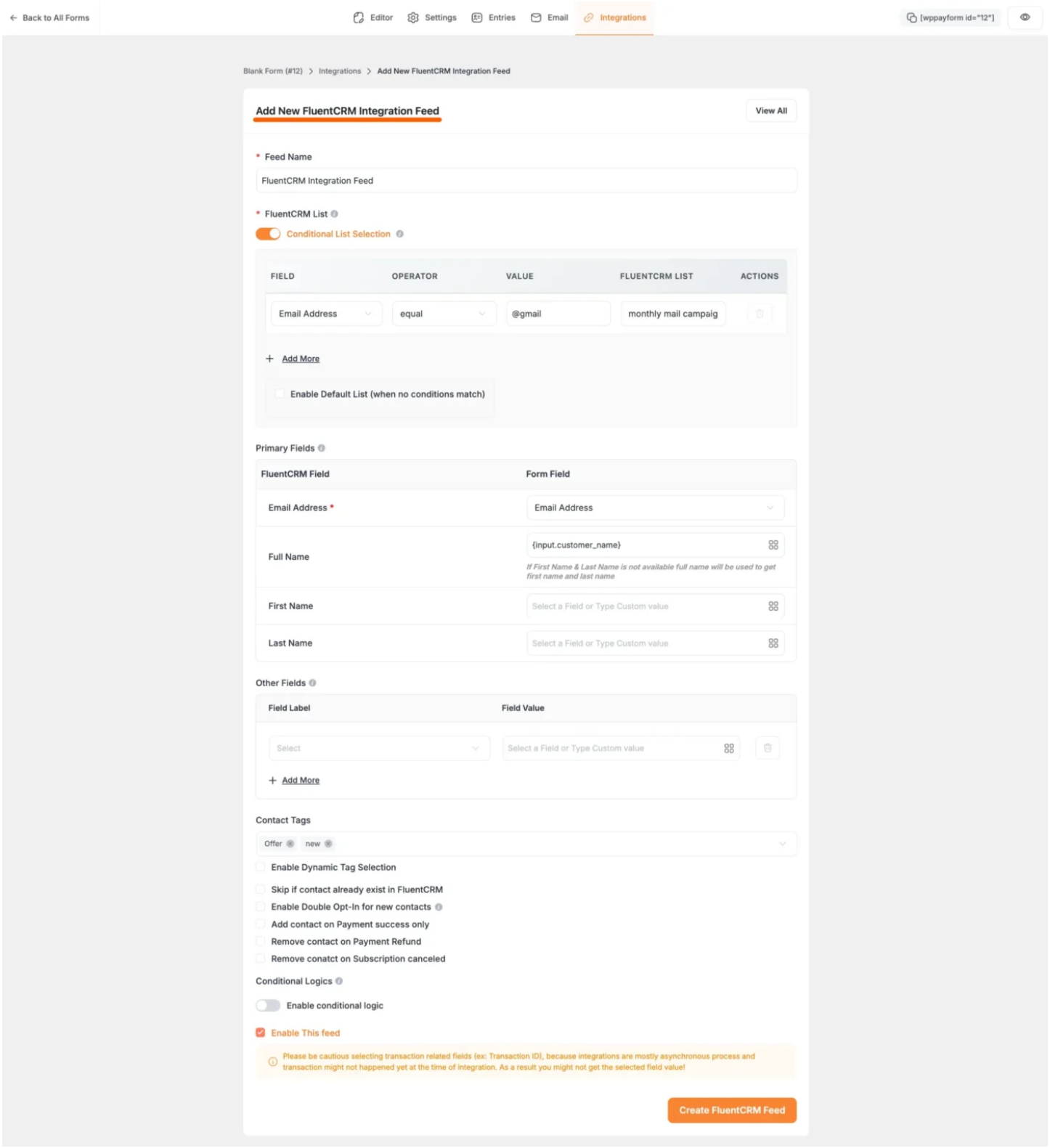
- Click the **Add More** button to create a new rule.
- Set the conditions for the rule based on the following:
  - **FIELD:** In this dropdown, select the form field that the condition will be based on..
  - **OPERATOR:** Choose a comparison operator (e.g., equal, not_equal, greater_than).
  - **VALUE:** Enter the value to check against the user's input.
  - **FLUENTCRM LIST:** Select the list to which the contact will be added if the condition is met.
- You can also check the **Enable Default List (when no conditions match)** box to select a fallback list for contacts who do not meet any of your defined conditions.

- **Primary Fields**: Use all the fields under this option to properly link your FluentCRM Fields with the Form Fields. Also, you can easily select the **Value** for the **Form Fields** according to the **FluentCRM Fields** by using the **Shortcode** button.
- **Other Fields**: Use this option if you need to add your FluentCRM fields beside the primary fields. Here also, you can select the **Value** according to the **FluentCRM Fields** by using the **Shortcode** button.

  Add as many **Other Fields** as you need by clicking the **+Add More** button.
  Also, **Delete** any Field by clicking the **Trash Icon** if needed.
- **Contact Tags**: With this option, you can add tags to your FluentCRM contacts.
- **Enable Dynamic Tag Selection:** Check this box to dynamically assign FluentCRM tags based on the user's choices in the form.
- **Skip if contact already exist in FluentCRM:** If enabled, the integration will not process a new entry if the submitted email address is already in your FluentCRM database.
- **Enable Double Opt-In for new contacts:** When checked, new subscribers will be sent a confirmation email that they must click to be officially added to your list.
- **Add contact on Payment success only:** This ensures that the contact is only added to FluentCRM after their payment has been successfully completed, not just on form submission.

- **Remove contact on Payment Refund:** If you enable this, the contact will be automatically removed from FluentCRM if their corresponding payment is refunded.
- **Remove contact on Subscription canceled:** When enabled, the contact will be automatically removed from FluentCRM if their subscription, initiated through this form, is canceled.
- **Conditional Logics**: This option allows FluentCRM integration to function conditionally based on your submission values according to your set conditional logic/s. Also, here, you can add as much conditional logic as you need by clicking the **+ Add More** button and delete any logic by clicking the **Trash Icon** if needed. To learn more, read this Documentation.
- **Enable This Feed**: Check this option, to ensure this integration feed remains enabled, and all the actions of this feed function properly.

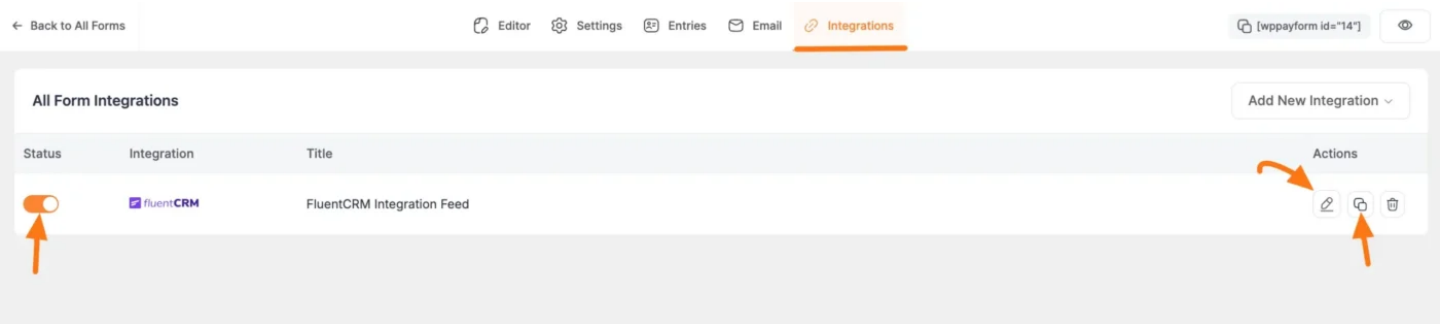
Once the setup is done, finally, click the **Create FluentCRM Feed** button.
And, your FluentCRM will be integrated into this specific form.



After successful Integration, now you will see that your **FluentCRM Integration Feed** has been added here.

You can edit your feed anytime by clicking the **Pencil** icon or delete it using the **Trash** icon. If you want to duplicate an existing integration feed, click the **Duplicate** icon. This allows you to recreate similar feeds with just one click.

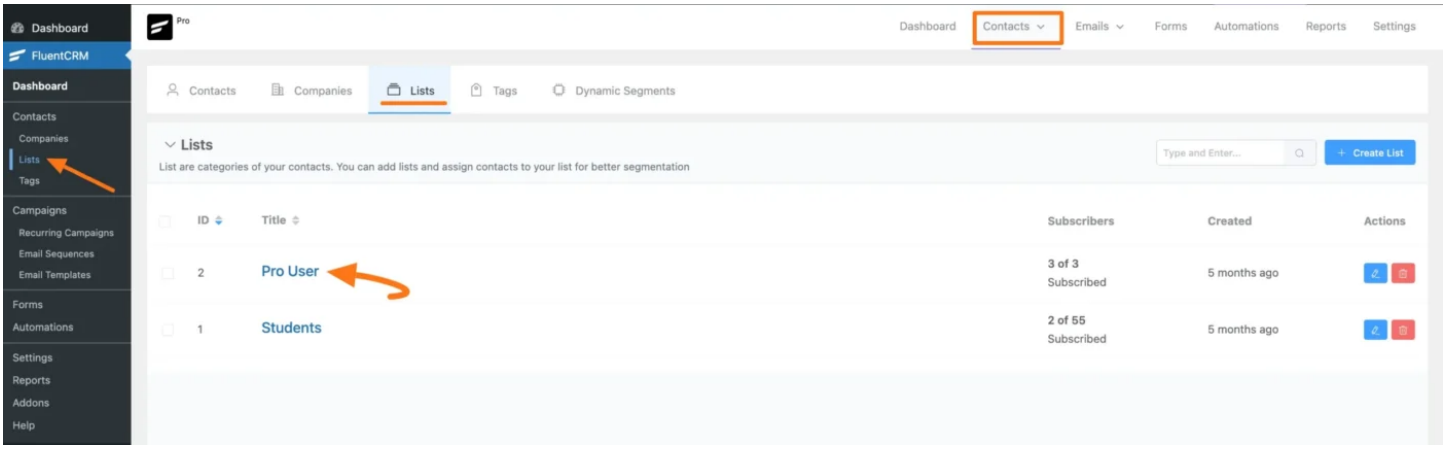
Additionally, you can enable or disable the feed anytime using the **Toggle** button as needed.



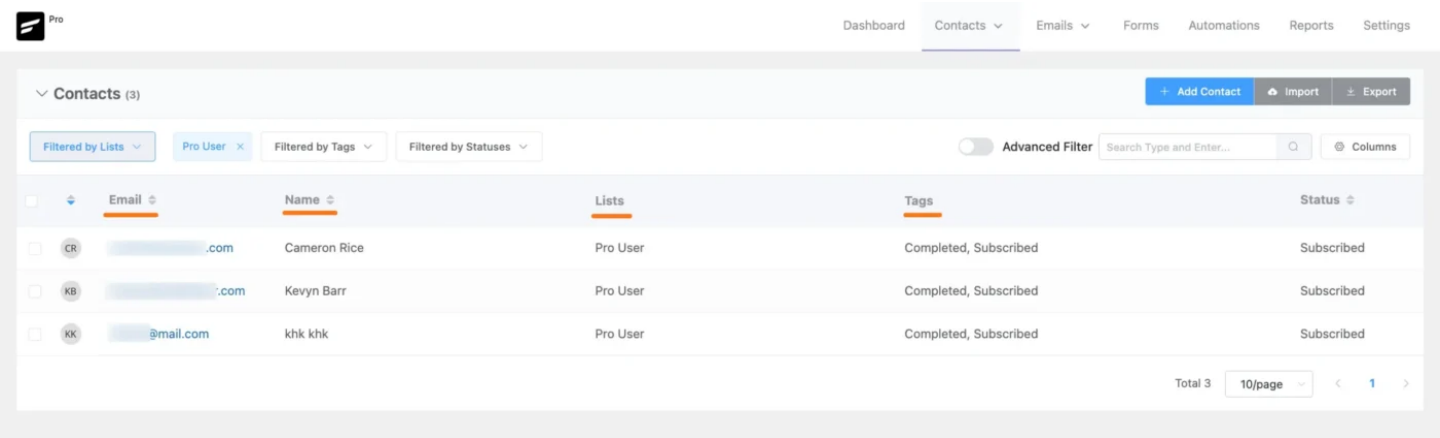
Preview of Integrated FluentCRM

Here, you can see the preview of the added contacts of FluentCRM through the Form entries that I set up during the integration.

First, go to the **Contacts** section from the left sidebar, open the **List** tab, and click on the **Desired List** you integrated into **Paymattic**.



And, you can see that **Contacts** are added automatically to the chosen **FluentCRM Contact List** through the Paymattic Form submission.



This way you can easily integrate FluentCRM with Paymattic!

If you have any further questions, concerns, or suggestions, please do not hesitate to contact our @support team. Thank you.