



ZENPLICITY
Marketing. Membership. Metrics.

BEST PRACTICES

for keeping Infusionsoft
& AccessAlly Users
Consolidated

www.ZenplicityNow.com

Hello, my friend!

Keeping accurate membership records can be tricky and time consuming if it's not done properly and regularly.

That's why I've created this handy guide to help you keep your member records nice and tidy if you're using Infusionsoft & AccessAlly for your membership tech stack and aren't working with a technical expert who is managing them for you.

Before we dive into things, let's go over how AccessAlly & Infusionsoft work together. AccessAlly is the Wordpress plugin that controls member permissions and access on the membership site. Infusionsoft is a CRM responsible for lots of things, but for our purpose today, is where your tags for member access live inside a contact record for your members. It's also the "connector" through HTTP Posts (aka webhooks) that "talks" to AccessAlly when changes are made in the contact record.

Those two platforms need to know when changes are made on either side. Most of the time integration is seamless and you don't have to do anything to update member records, and sometimes it's necessary to merge, update or delete records in one platform when updates are made in the other platform.

Following these guidelines will allow you to correctly make those changes and diminish the amount of errors you may see if and when those changes aren't done properly.

Remember, the AccessAlly support team is always standing by to answer your questions. Team Zen and I are also happy to help you find one of our support packages that fit your needs if you're looking for a team of experts to help you manage the regular maintenance and technical components of your membership site.

Let's dive in!

Jamie



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01 MERGING & DELETING CONTACTS IN INFUSIONSOFT

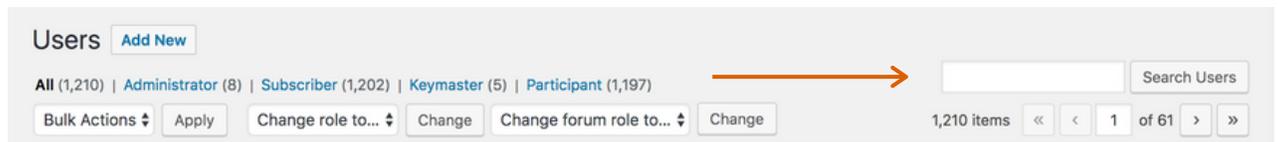
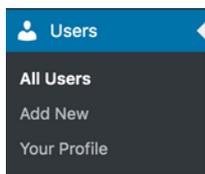
There are many circumstances that will require you to merge or delete users in Infusionsoft. However it is important to note that **doing these actions in Infusionsoft will not always reflect in AccessAlly automatically**. Below we'll cover the best practices for deleting or merging contacts in Infusionsoft to keep AccessAlly user permissions and tags in working order.

DELETING USERS IN INFUSIONSOFT

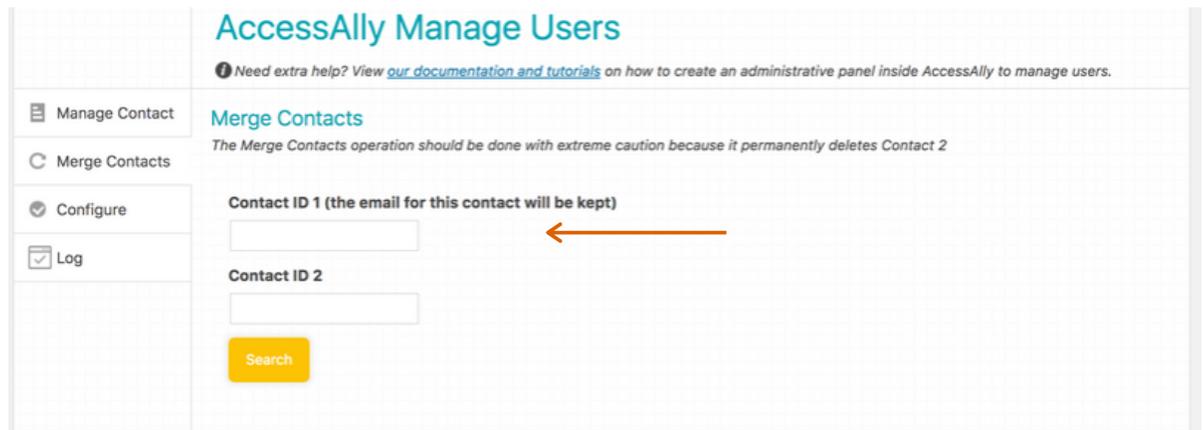
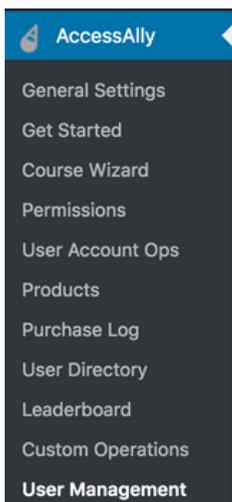
Before deleting a user in Infusionsoft, make sure you want to delete the same user in AccessAly. If for any reason that Infusionsoft user needs to remain in AccessAly, you must leave that user account in Infusionsoft as well. It is also important to note that a contact is linked via the contact ID.

RECOMMENDED STEPS

1) search for the User Email Address in AccessAly/Wordpress to see if there is a user profile.



2) search for the contact ID (found in the url for the Infusionsoft profile) under the User Management section in AccessAly



3) make sure there are no current active subscriptions linked to both the email and the contact ID of the user under the AccessAly Purchase Logs area.

The screenshot displays the 'AccessAly Purchase Logs' interface. On the left is a dark sidebar with the 'AccessAly' logo and a list of menu items: General Settings, Get Started, Course Wizard, Permissions, User Account Ops, Products, and Purchase Log. The main content area has a light blue header with the title 'AccessAly Purchase Logs' and a help link: 'Need extra help? View our documentation and tutorials on purchase and subscription management.' Below the header is a 'Subscription Log' section with 'Payment filters'. The filters are: Status (a dropdown menu set to 'All'), Subscription ID, Order ID, Product ID, Email, CRM Contact ID, and Customer ID / PayPal Email. At the bottom right, there is a pagination bar showing '1 of 65' with navigation arrows.

REMEMBER:

If you want the user to remain in AccessAly, they NEED to have a profile in Infusionsoft. If you want to remove them from both Infusionsoft AND AccessAly you will need to delete the AccessAly user account separately.

You can do that by simply deleting the user in both Infusionsoft and AccessAly. Without doing this you will likely run into User Permission Errors that result in warning and error messages from AccessAly in Wordpress.

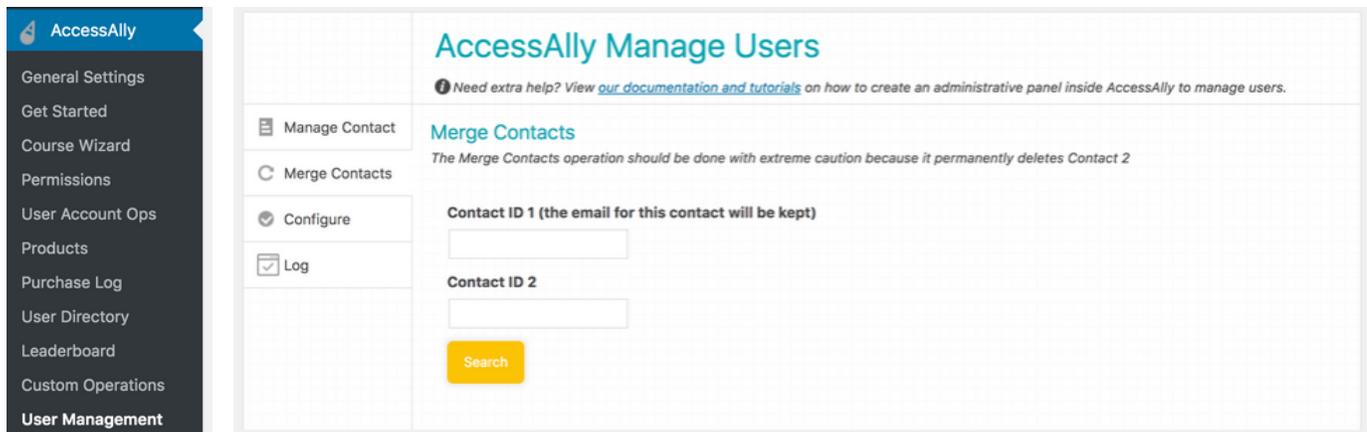
If you are deleting a profile due to multiple accounts in Infusionsoft see the best practices on merging users in Infusionsoft.

MERGING USERS IN INFUSIONSOF

To properly merge contacts to keep user permissions accurate, you need to consider the contact ID number for the profiles you want to merge.

Generally we recommend making all merges through AccessAlly if possible. You can easily look up both user accounts via email addresses in AccessAlly and find their contact IDs in the user profiles.

MERGING ACCOUNTS VIA ACCESSALLY



The screenshot shows the 'AccessAlly Manage Users' interface. On the left is a dark sidebar with a white 'AccessAlly' logo at the top and a list of menu items: General Settings, Get Started, Course Wizard, Permissions, User Account Ops, Products, Purchase Log, User Directory, Leaderboard, Custom Operations, and User Management. The main content area has a white background with a blue header 'AccessAlly Manage Users'. Below the header is a warning icon and text: 'Need extra help? View our [documentation and tutorials](#) on how to create an administrative panel inside AccessAlly to manage users.' A left-hand navigation pane contains 'Manage Contact', 'Merge Contacts' (selected), 'Configure', and 'Log'. The 'Merge Contacts' section is active, showing the title 'Merge Contacts' and a warning: 'The Merge Contacts operation should be done with extreme caution because it permanently deletes Contact 2'. Below this are two input fields: 'Contact ID 1 (the email for this contact will be kept)' and 'Contact ID 2'. A yellow 'Search' button is positioned below the second input field.

MERGING ACCOUNTS VIA INFUSIONSOF

While we don't recommend this, sometimes it's necessary if one of the accounts doesn't exist in AccessAlly.

For example: if there are two profiles in Infusionsoft and only one profile in AccessAlly, you will need to merge contact records in Infusionsoft.

The key here is to maintain the integrity of the contact ID that is used in AccessAlly. Thus when asked which contact ID to keep for the newly merged contact make sure it matches the contact ID of the AccessAlly user.

RECOMMENDED STEPS

1) Find the contacts you want to merge through the Contact Search in Infusionsoft.

<input checked="" type="checkbox"/>	Jamie DuBose  Company: Zenplicity Phone 1: Email: zenplicitytesting@gmail.com	State (Billing): Person Type:
<input checked="" type="checkbox"/>	Jamie DuBose  Company: Phone 1: Email: zenplicitytesting@gmail.com	State (Billing): Person Type:

2) Select "Merge Duplicate Contacts" from the Action dropdown menu.

Actions ▾ Edit Fields... Advanced Search >>

Apply/Remove Tags
Delete Contacts
Send a Broadcast
Merge Duplicate Contacts
Start/Stop a Campaign Sequence
Update Opt-In/Out Status

<input checked="" type="checkbox"/>	Jamie DuBose  Company: Zenplicity Phone 1: (797) 797-3251 Email: zenplicitytesting@gmail.com	State (Billing): CA Person Type:
<input checked="" type="checkbox"/>	Jamie DuBose  Company: Zenplicity Phone 1: Email: zenplicitytesting@gmail.com	State (Billing): Person Type:
<input checked="" type="checkbox"/>	Jamie DuBose  Company: Phone 1: Email: zenplicitytesting@gmail.com	State (Billing): Person Type:

3) Preview the contact fields that will be merged. Pay special attention to the ID field. Infusionsoft will always keep the lower ID. You may need to update this ID in the user profile in Wordpress/AccessAly.

Merge Contact Fields

Fields	Contact	Merged Contact	More Recent Contact
Id:	2729	2729	2877
First Name:	Jamie	Jamie	Jamie
Last Name:	DuBose	DuBose	DuBose
Company:	Zenplicity	Zenplicity	
Website:	www.zenplicitynow.com	www.zenplicitynow.com	www.zenplicitynow.com
Email:	zenplicitytesting@gmail.com	zenplicitytesting@gmail.com	zenplicitytesting@gmail.com
Created By:	Jamie DuBose	Jamie DuBose	Jamie DuBose
Contact Us Comments:	Testing the Referral Contact Form	Testing this contact form	Testing this contact form
New Lead Date:	07-24-2016	07-24-2016	
Who can we thank for referring you?:	Myself	Myself	Myself

Merge & View Contact Merge & Return To Search Mark as Duplicates Cancel

4) Click Merge & View Contact

Company:	Zenplicity	Zenplicity
Website:	www.zenplicitynow.com	www.zenplicitynow.com
Email:	zenplicitytesting@gmail.com	zenplicitytesting@gmail.com
Created By:	Jamie DuBose	Jamie DuBose
Contact Us Comments:	Testing the Referral Contact Form	Testing this contact form
New Lead Date:	07-24-2016	07-24-2016
Who can we thank for referring you?:	Myself	Myself

Merge & View Contact Merge & Return To Search Mark as Duplicates Cancel

02 **UPDATING CONTACTS IN INFUSIONSOFT & ACCESSALLY / WORDPRESS**

Sometimes it's necessary to make updates to contact records for various reasons. That's all fine, but you need to be aware of the changes you need to make on both sides of the integration. We'll go over those scenarios in this section so you can confidently make updates to your member profiles if and when it's necessary.

UPDATING A USER PROFILE IN INFUSIONSOFT

When you make changes to a contact record in Infusionsoft, it will not automatically update the user in AccessAlly. You must run a webhook from within Infusionsoft to transfer changes to AccessAlly.

The most common use case for this is when you manually add or remove tags from a contact record in Infusionsoft and those changes need to be updated in AccessAlly.

If you don't already have a 'sync' sequence setup we recommend setting up a simple sequence like this within one of your campaigns:

The image shows two screenshots of the Infusionsoft interface. The top screenshot displays a campaign named 'ACCESSALLY \leftrightarrow INFUSIONSOFTE SYNC'. The campaign is in the 'Published' state. The sequence editor shows a single step: 'Update/Create a User in AccessAlly'. The bottom screenshot shows the configuration for the 'Update/Create a User in AccessAlly' sequence. It starts with a 'Start' trigger, followed by a 'Send HTTP Post' action. The sequence is also in the 'Published' state.

HTTP Webhook Example:

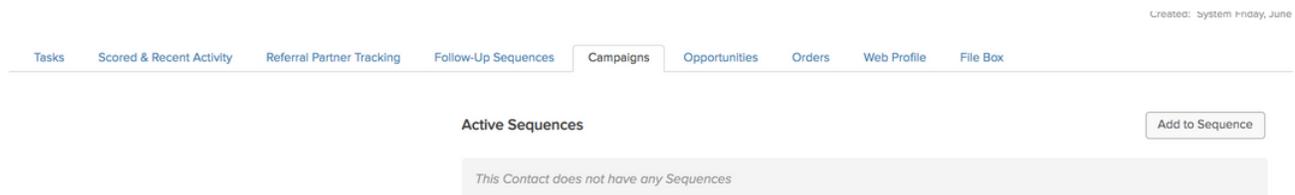
https://YOURWEBSITE.com/?aal_genpass=YOURACCESSALLYID

Once you have this sequence setup you can then update a user profile in Infusionsoft by simply adding your contact to this sequence.

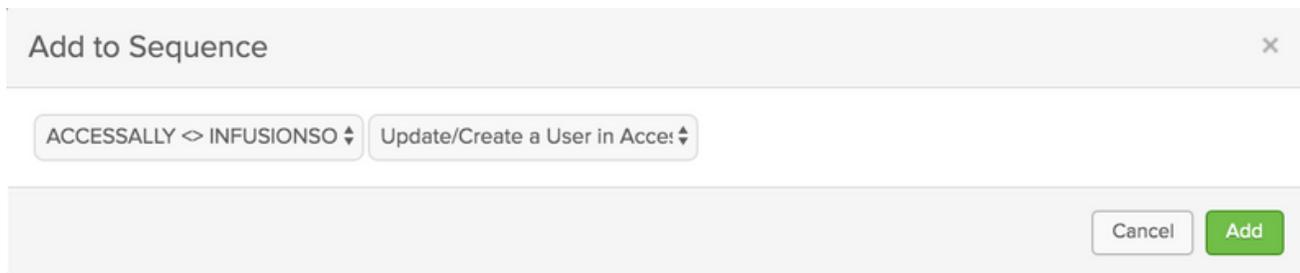
1) Find the profile of the user you want to update. Edit the tags/profile information as needed.

2) Once the user profile is edited AND saved (make sure to save after changing tags, etc.) you can scroll to the bottom of the profile page and click on the "Campaigns" tab.

3) Under the "Campaigns" tab click on the "Add to Sequence" button

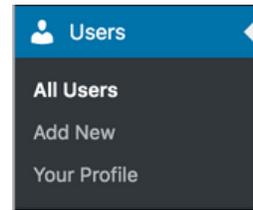


4) Find the campaign and sequence which contains the webhook and click "Add"



UPDATING A USER PROFILE IN WORDPRESS

1) Find the user profile you want to update. You can do this by simply going to USERS in Wordpress and searching the email address or name on the account.



2) Scroll to the AccessAlly Membership Information at the bottom of the User Profile. Here you will find the contact ID # as well as the tags for this user.

AccessAlly Membership information

Infusionsoft Contact ID

The contact ID is the unique identifier that links this user to contact record in Infusionsoft.

Infusionsoft Contact tags

Any changes you make to a member's tags WILL be saved back to their Infusionsoft record.

Search

Bonjoro - Create Generic Message Change Agent Questionnaire Individualizer

AccessAlly Affiliate

No affiliate

All-Access Mode (for administrator testing ONLY!)

Enable All-Access Mode for this user

Enabling this option will allow this user to see all pages and disregard all conditional redirects.

Manually refresh membership data

Refresh Infusionsoft information (tags and password).

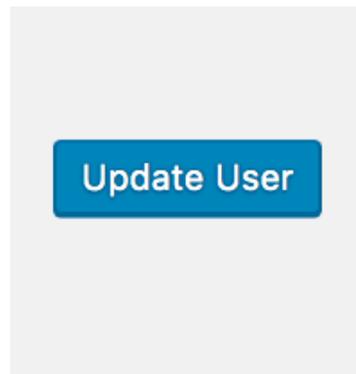
On profile update, the current information will be overwritten with what is stored in Infusionsoft.

3) Update any tags or the contact ID number for this user.

Note: use caution when changing the contact ID - double check it matches the proper profile in Infusionsoft, that it is not already used for another user in AccessAlly and that the current contact ID is not linked to any current subscriptions in AccessAlly

4) Check the 'refresh infusionsoft information' box.

5) Scroll to the very bottom of the profile and click the "Update User" button to save all the changes. If you don't do this it will not update the profile in Infusionsoft OR AccessAlly.



03 COMMON ACCESSALLY ERRORS AND HOW TO FIX THEM

There are some common AccessAlly errors that might pop up in your WordPress dashboard from time to time, and if you don't know what they mean, they can be pretty alarming. We're going to talk about those errors in this next section and give you steps to resolve the errors on your own so you can stop worrying and get them taken care of immediately.

SOME USERS HAVE INVALID CONTACT ID

AccessAlly: Some users have invalid contact ID. Please update through [Permission Settings](#).

Dashboard

AccessAlly: Some users have invalid contact ID. Please update through [Permission Settings](#)

This error occurs when contacts have a user profile in the membership site but are not connected to a contact record in Infusionsoft. This usually happens when a contact has been deleted in Infusionsoft or has been merged as a duplicate contact in Infusionsoft.

We'll go over a couple options for resolving this issue below.

MULTIPLE USERS HAVE THE SAME CONTACT ID

 Multiple users have the same Contact ID [74871]. Please remove the duplicate user(s) manually.

user#1@gmail.com	GO TO PROFILE	DELETE
user#2@gmail.com	GO TO PROFILE	DELETE

This error occurs because two contacts in AccessAlly are pulling from one contact ID in Infusionsoft.

We recommend checking which email is linked to the contact ID in Infusionsoft and keeping that account as is (same email/contact ID) and editing the other account in one of the following ways:

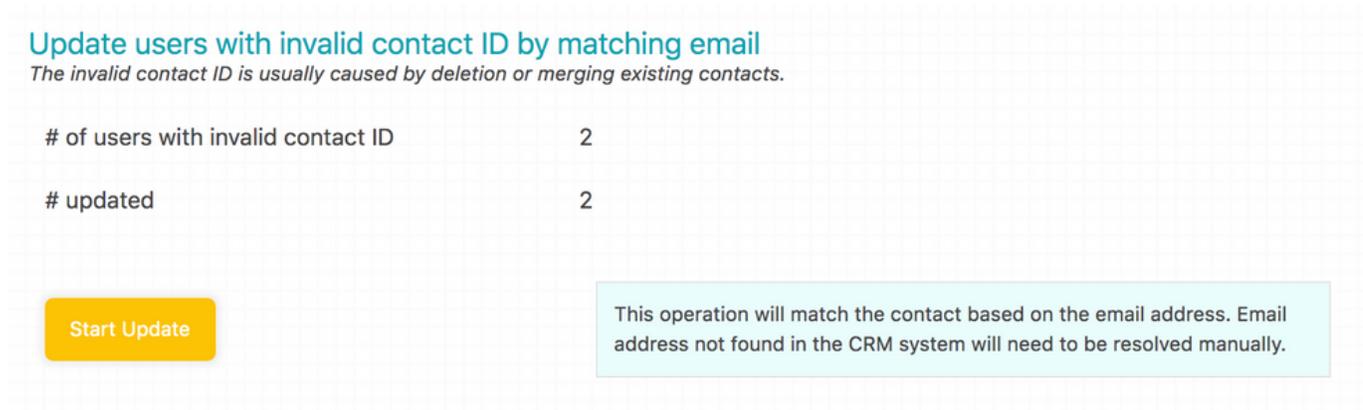
- 1) changing the contact ID to match the proper profile in Infusionsoft
- 2) deleting the account altogether if it is not used/can not be found in Infusionsoft

*NOTE: Always make sure the email address of the account being deleted is not attached to any current subscriptions that are being billed via AccessAlly.

CONTACT ID COULD NOT BE FOUND



Before cleaning up profiles with missing contact IDs, run the 'Update users with invalid contact ID by matching email' function in AccessAly. This will search for the email in Infusionsoft and match it to the new Contact ID. If one is found, it could save you lots of time.



After you "update users with invalid contact ID by matching email" and you still have users with missing contact IDs we recommend the following steps by asking:

Is the email in Infusionsoft?

Is the Contact ID found in Infusionsoft?

Is the Contact ID linked to a subscription in AccessAly?

If **you answered NO to ALL of these questions**, you have two options:

1. delete the user if it's no longer needed in AccessAly
2. create another contact record in Infusionsoft and place the Contact ID in the User profile in AccessAly. Sync the user profile by checking the "refresh Infusionsoft information" box in the user profile.

If your Contact ID is linked to a subscription in AccessAly, contact Team Zen for more clarification on how to solve this problem. (Trust us, it gets kinda messy.)

If you meant to delete the user from Infusionsoft, that's totally fine! You may have forgotten to delete the user from AccessAlly, too. If that's the case, simply delete the user.



*NOTE: Please be super careful when you (or team members) make any changes to user profiles and contact records! You can always re-add a user with minimal issue, but you can not retrieve any site log history from the old user profile.

If you have any questions about your particular use case or scenario, the AccessAlly Team can usually get you squared away in a jiffy. Drop them an email at your@accessally.com for individual, quick, friendly support.

Or if you're one of our clients on one of our Agency Packages, shoot us an email and we'll take care of it for you!

I'm Jamie DuBose, CEO & Founder of Zenplicity, the digital marketing agency that helps profitable entrepreneurs become more sustainable through marketing, membership, and metrics.

As an AccessAlly Certified Partner, I've had the pleasure of supporting clients with their membership site projects since 2015.

I believe that every entrepreneur has a unique opportunity to use the membership site model to diversify and scale their business, and I would be honored to help you fulfill your dreams of passive income and community growth.

Together, we can make your membership site dreams a reality! Connect with me, and we'll book a quick call together to see how I can support you!

LET'S TALK!

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