



# User Guide

Dated: 26 January 2018

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## Understanding Tags and Automations

WP Smart Tags use tagging to track member activity, segment members, and then influence member behavior by dynamically controlling content specific to each member.

- Tags identify something about the member; a link they clicked on, a form they completed, a page they viewed.
- Tags are added or removed from a member by automations (conditional controls that are placed on any member that has that tag.) or through integrations with an approved membership site plugin.
- Content can be displayed or hidden based on a tag.
- Pages can be redirected based on a tag.
- Sidebar widgets can be displayed or hidden based on a tag. Emails can be sent based on a tag.

Tags are a powerful way to understand member activity and by using automations you can increase member engagement and improve member retention rates.

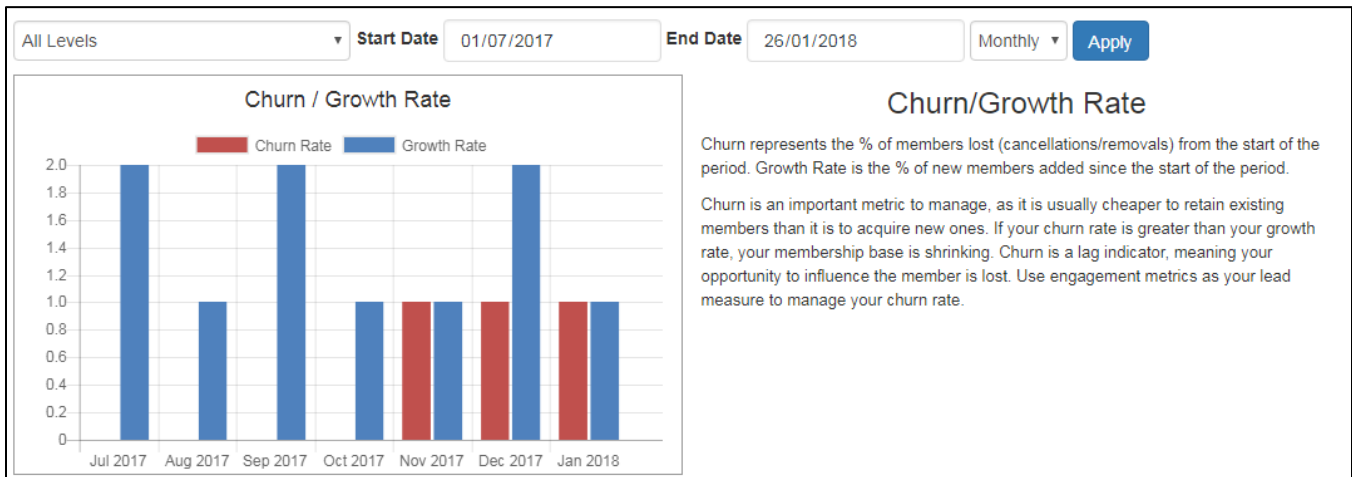
WP Smart Tags provides great flexibility in how you use tags and automations, allowing for a uniquely customized member experience that cannot be accomplished with any membership site plugin alone.

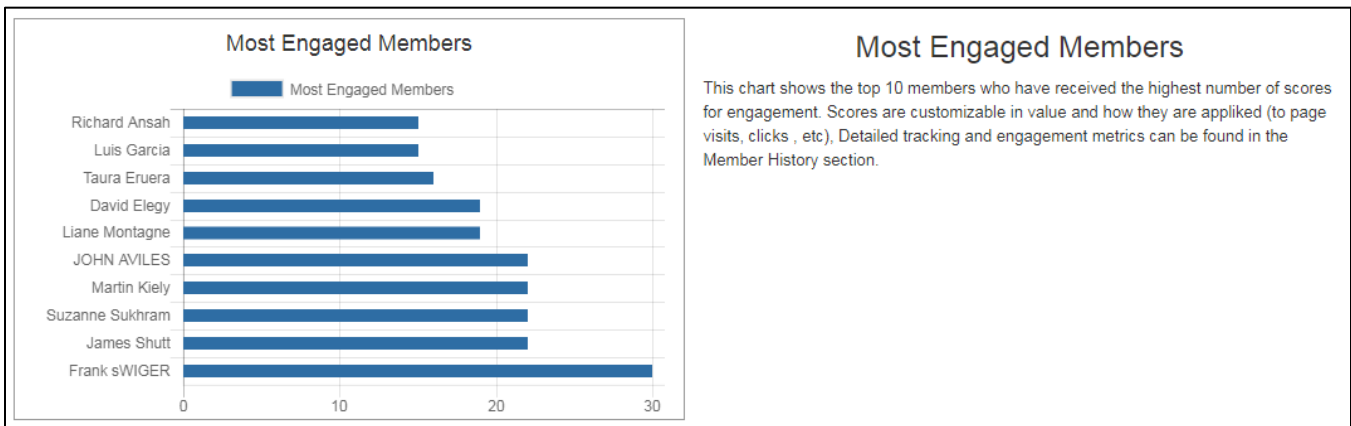
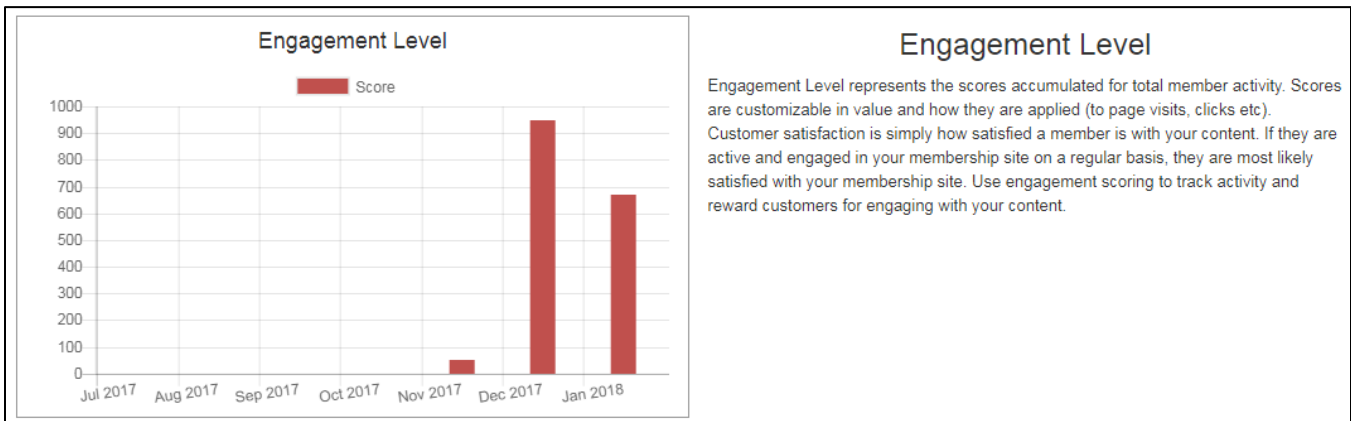
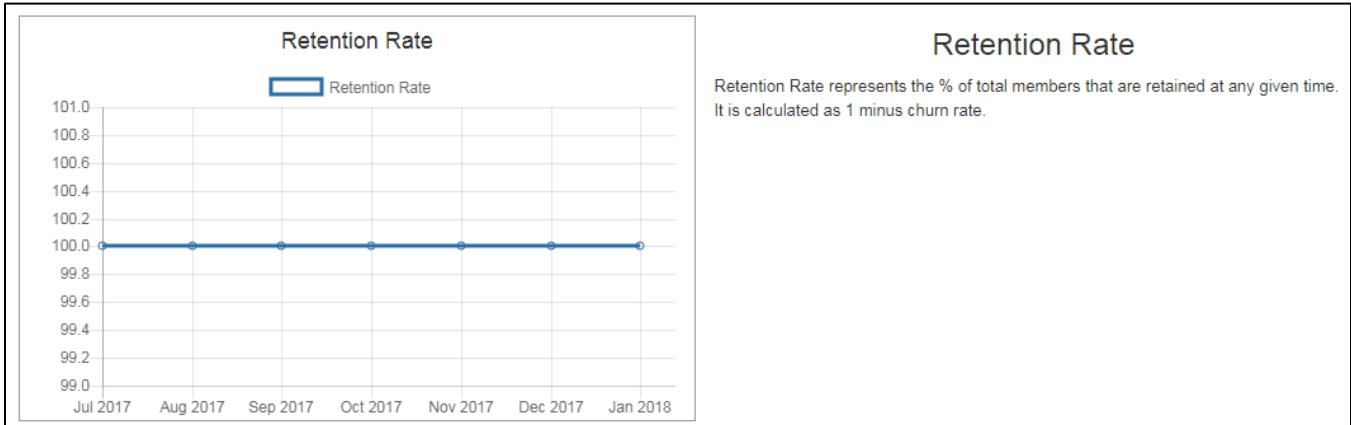
Some examples include;

- Member Segmentation – identifying member interest based on actions taken
- Member Re-engagement – Send an automated email when a member hasn't logged in for a period of time.
- Retargeting – display ads or content to members based on interest or actions taken
- Reward Members – provide access to content or membership levels based on actions taken

## Analytics

The WP Smart Tags dashboard displays important metrics on the overall performance of your membership site.



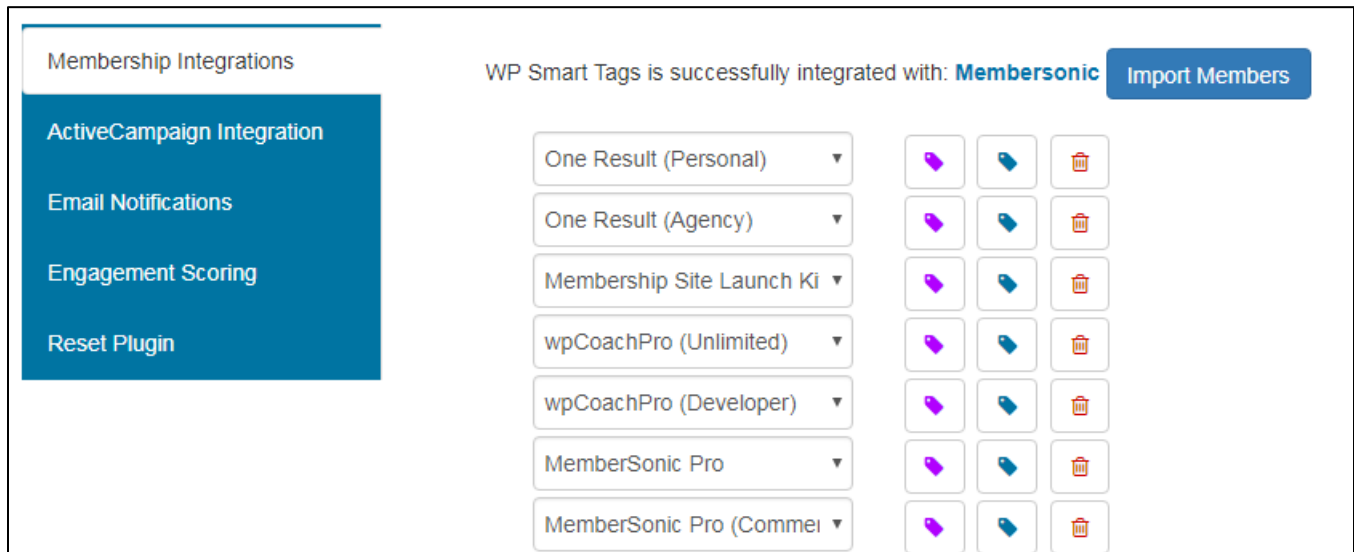


## Settings

### Membership Integration

WP Smart Tags will work on any WordPress based membership site. Integration with the following membership site plugins will unlock additional options within the settings and automations:

- MemberSonic
- Wishlist Member
- MemberPress
- Digital Access Pass \*
- MemberMouse
- S2 Member



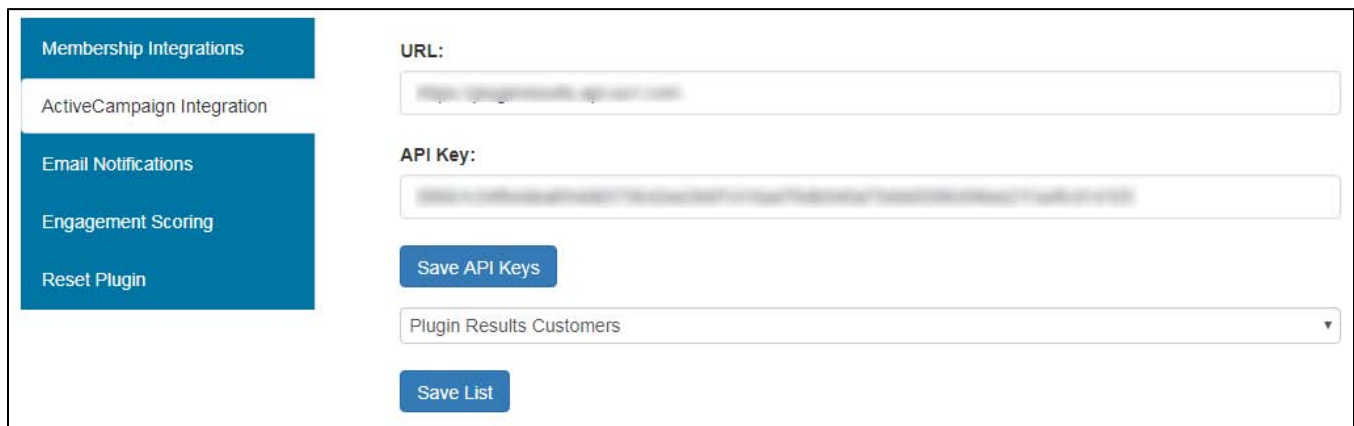
Integration Option	Tag Icon	Delete Icon	Trash Icon
One Result (Personal)			
One Result (Agency)			
Membership Site Launch Ki			
wpCoachPro (Unlimited)			
wpCoachPro (Developer)			
MemberSonic Pro			
MemberSonic Pro (Commer			

Under the Settings – Membership Integrations screen, WP Smart Tags will automatically identify the membership site plugin you are using (if one of the approved listed above). You can select a

membership level from the dropdown and add tags when someone joins that level, or add tags when someone cancels that level. **In order to complete this step, you must first create some Tags! Proceed to the Tag section of WP Smart Tags to create purchase tags and refund/cancellation tags for each of your membership site levels/products.**

## ActiveCampaign Integration

If you use ActiveCampaign for email marketing, you can configure WP Smart Tags to automatically push tags from your membership site to your member's contact profile in ActiveCampaign.



## Email Notifications

You can configure an automated email that can be sent to members that have not logged in for a specified number of days. This is useful to re-engage members that have not visited your site for some time. You can also force users to automatically log out of your membership site after X minutes.

## Settings

Force Logout User when idle for  minutes.

### No Login Notification

If user does not login for  days, then send this Notification.

Leave empty or Input '0' to disable.

Email Subject 

Email message

Shortcodes: [FirstName],[LastName],[Email],[UserName]

Andrew hunter

support@pluginresults.com

Save

**NOTE:** In order to use this feature (as well as other email features within automations), you need to configure a CRON job within your cpanel.



### Cron Script

#### Add the Cron Job through cPanel:

1. Log into your cPanel.
2. In the Advanced section, click Cron jobs.
3. Under Add New Cron Job, select the time interval. We recommend that you do not set the interval lower than 5 minutes.
4. Set the following as cron command:  
**wget http://one.pluginresults.com/?wpstcron=1 > /dev/null 2>&1**
5. Click Add New Cron Job to set the cron.
6. **IMPORTANT** : In some servers the settings could be different. Please check with your Hosting provider if this is not working..

## Engagement Scoring

Under Settings – Engagement Scoring, you can award points to members each time they login. You can also award points based on specific page visits.

- Membership Integrations
- ActiveCampaign Integration
- Email Notifications
- Engagement Scoring**
- Reset Plugin

#### Login

#### Page Visit

## Reset Plugin

These are administration features where you can optionally reset your plugin license key, or delete all WP Smart Tags data/tables from your WordPress database (not recommended unless you are starting fresh).

- Membership Integrations
- ActiveCampaign Integration
- Email Notifications
- Engagement Scoring
- Reset Plugin**

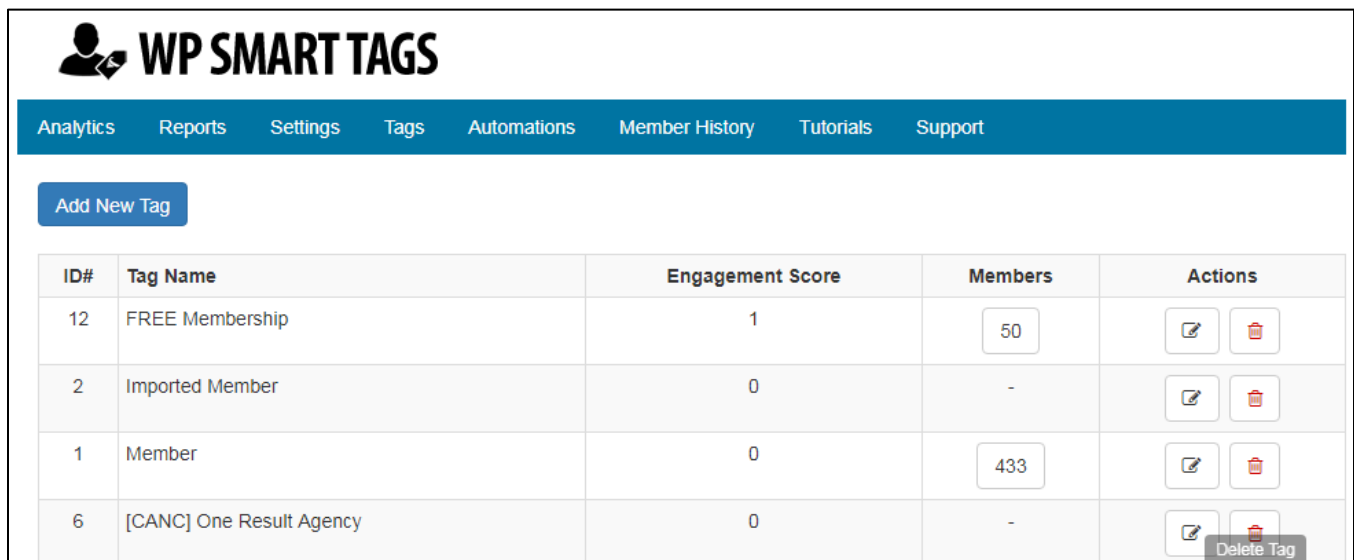
**Reset License key**

**IMPORTANT:**  
When you click the "Factory Reset" button below, ALL Wp Smart Tags related data will be erased permanently.









Proceed With Factory Reset

## Tags

On the Tags screen you can create new tags (you can create an unlimited number of tags), edit each tag, and see how many members have each tag (Clicking on the number of tags will display a listing of each member with that tag).



The screenshot shows the WP SMART TAGS interface. At the top, there is a navigation bar with links for Analytics, Reports, Settings, Tags, Automations, Member History, Tutorials, and Support. Below the navigation bar is a button labeled "Add New Tag". The main content area features a table with the following data:

ID#	Tag Name	Engagement Score	Members	Actions
12	FREE Membership	1	50	 
2	Imported Member	0	-	 
1	Member	0	433	 
6	[CANC] One Result Agency	0	-	 

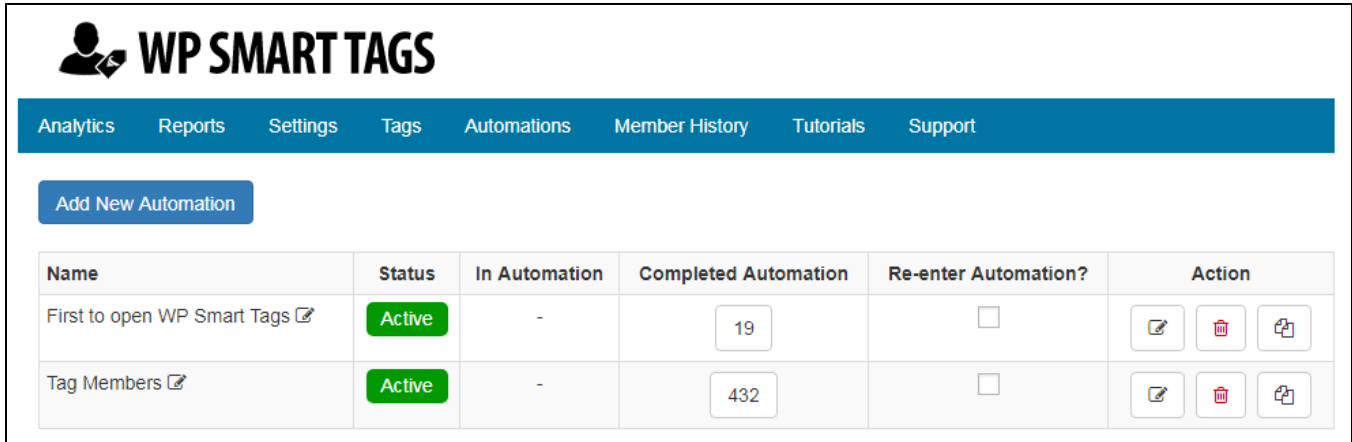
A "Delete Tag" tooltip is visible over the delete icon for the "[CANC] One Result Agency" tag.

Tags are the foundation of WP Smart Tags, so put some serious thought into the naming convention you use. We have provided a Smart Tags Naming Guide to assist you.









Tags are used everywhere within WP Smart Tags, so this will be the first place you start as you use WP Smart Tags.

## Automations

Automations are a powerful tool to automatically control content based on member tags. The Automations screen of WP Smart Tags lists all automations and how many members are engaged in each of the automations.



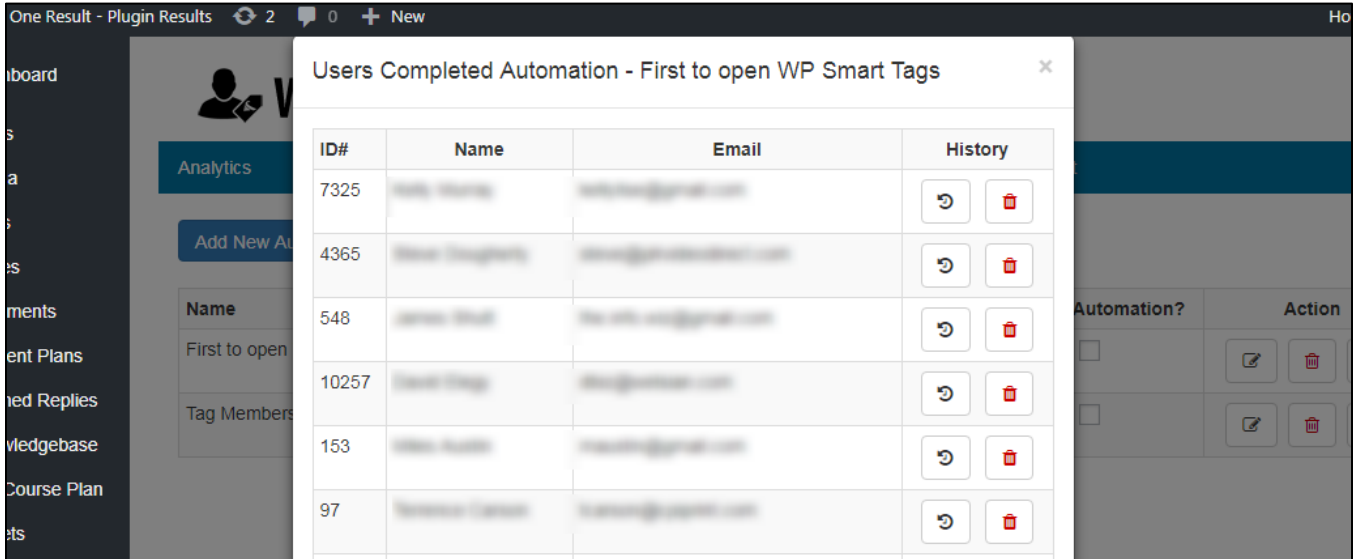
The screenshot shows the WP Smart Tags interface. At the top, there is a navigation bar with the following menu items: Analytics, Reports, Settings, Tags, Automations (highlighted), Member History, Tutorials, and Support. Below the navigation bar is a blue button labeled 'Add New Automation'. Below the button is a table with the following columns: Name, Status, In Automation, Completed Automation, Re-enter Automation?, and Action.

Name	Status	In Automation	Completed Automation	Re-enter Automation?	Action
First to open WP Smart Tags 	Active	-	19	<input type="checkbox"/>	  
Tag Members 	Active	-	432	<input type="checkbox"/>	  













Clicking on the 'Add New Automation' button will create a new automation. Automations have a number of options. We recommend you create multiple smaller automations instead of fewer complicated automations.

Clicking on the number in the 'In Automations' column will display the members in that automation.

By default members can only enter an automation once. Checking 'Re-enter Automation' will allow them to enter automations multiple times.



The screenshot shows a modal window titled "Users Completed Automation - First to open WP Smart Tags" overlaid on a dashboard. The modal contains a table with the following data:

ID#	Name	Email	History
7325	John Smith	john.smith@wp-smart-tags.com	 
4365	Jane Doe	jane.doe@wp-smart-tags.com	 
548	John Smith	john.smith@wp-smart-tags.com	 
10257	John Doe	john.doe@wp-smart-tags.com	 
153	John Smith	john.smith@wp-smart-tags.com	 
97	John Smith	john.smith@wp-smart-tags.com	 

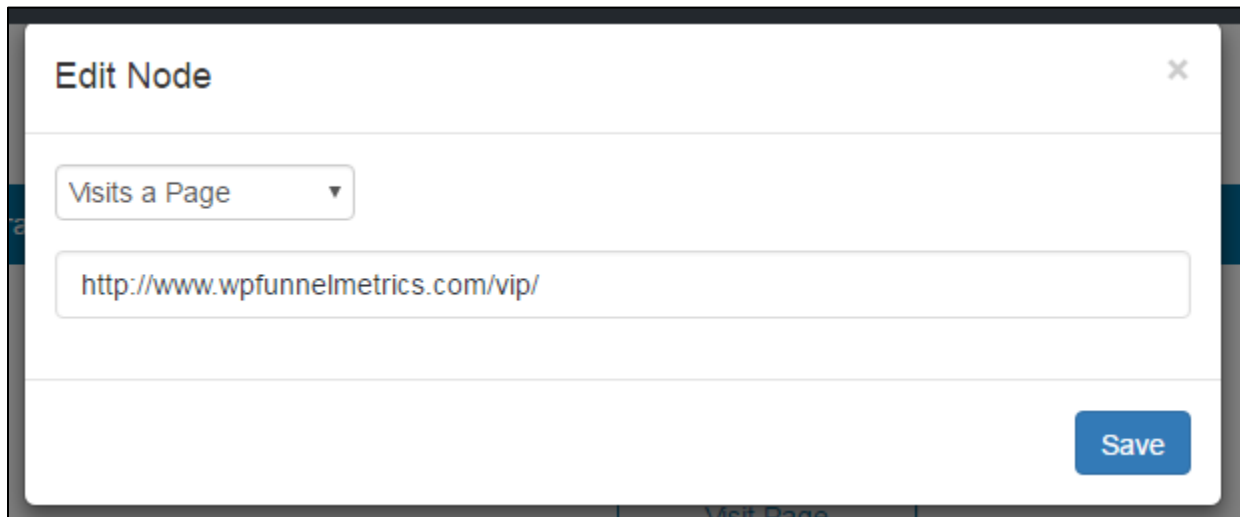
Clicking on the 'History' icon will display each step the member took within that Automation.

## Example Automation

Here is an example of an automation that assigns a tag when a member visits a particular page. The purpose of this automation is just to know who visited the page. I could then create an offer, or special content, or send an email to only those members that were tagged after visiting this page.



Let's walk through the two steps (called nodes) in this automation. This automation is first triggered when someone visits a page.



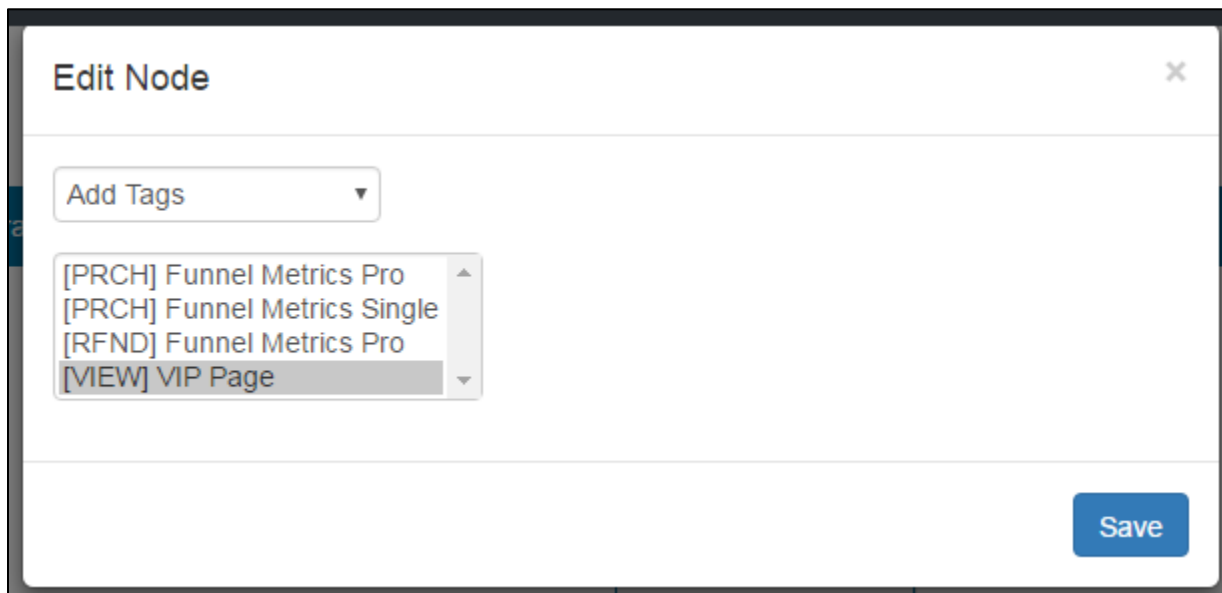
Edit Node

Visits a Page

http://www.wpfunnelmetrics.com/vip/

Save

If someone visits this page, they are tagged with '[VIEW] VIP Page'. They can optionally be tagged with any number of these tags (remember to first create your tags in the Tags section of WP Smart Tags before creating your automations).



Edit Node

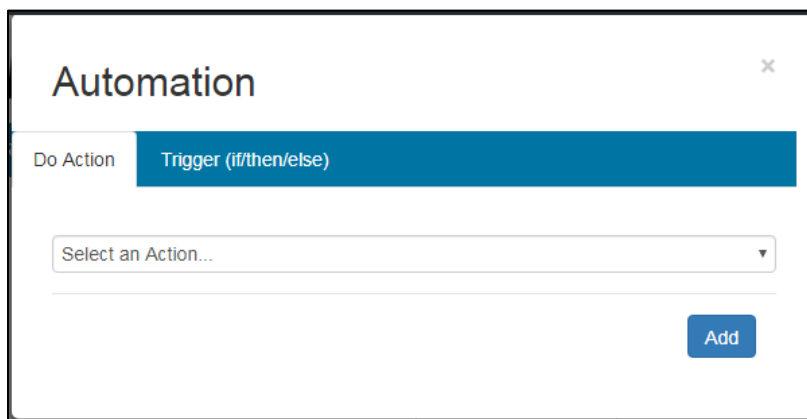
Add Tags

- [PRCH] Funnel Metrics Pro
- [PRCH] Funnel Metrics Single
- [RFND] Funnel Metrics Pro
- [VIEW] VIP Page

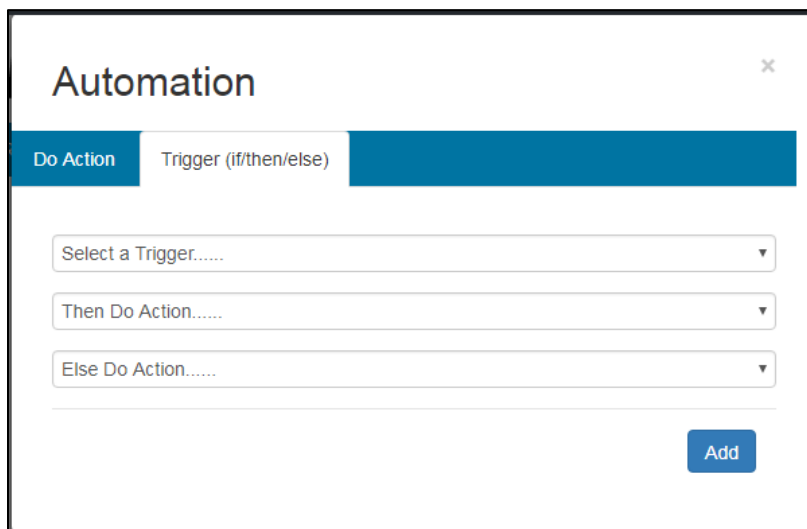
Save

## Two Types of Automation Nodes

A node can either be a 'Do Action' command or a 'Trigger' command. Do Action Commands are actions that occur when someone reaches that level of the automation. Conditional Trigger Commands will only occur if certain conditions are met. For example, if user has tag X, then add membership level, else wait 24 hours.



The image shows a configuration window titled "Automation" with a close button (x) in the top right corner. Below the title, there are two tabs: "Do Action" (which is selected) and "Trigger (if/then/else)". Under the "Do Action" tab, there is a dropdown menu labeled "Select an Action..." and a blue "Add" button at the bottom right.

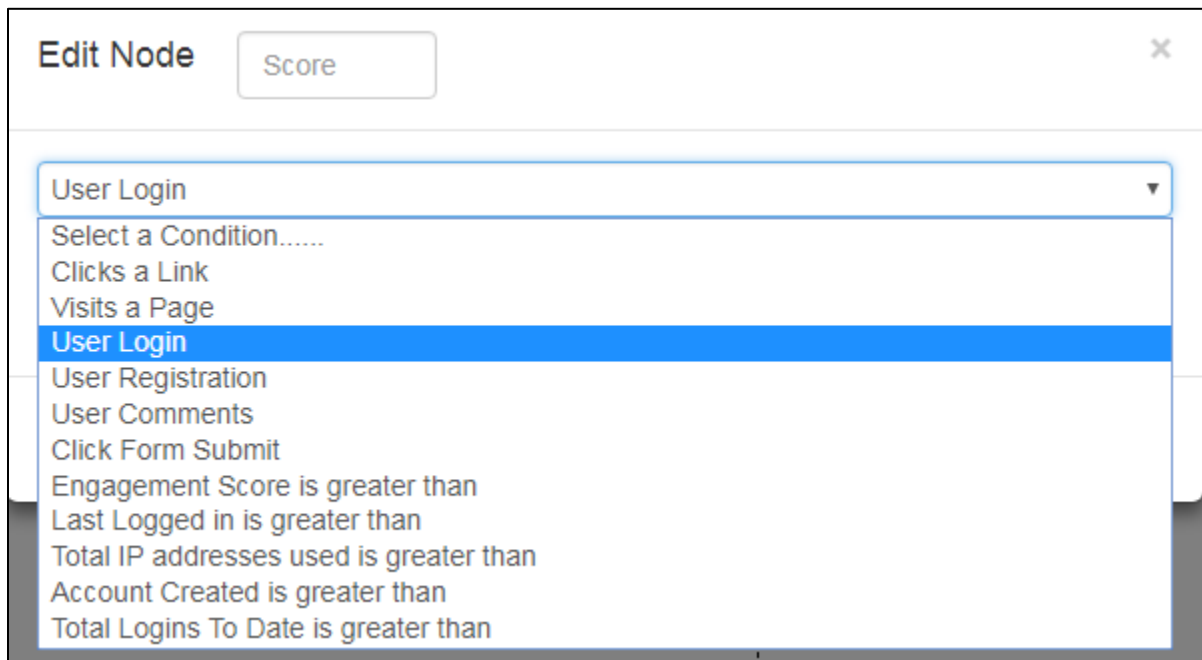


The image shows a configuration window titled "Automation" with a close button (x) in the top right corner. Below the title, there are two tabs: "Do Action" and "Trigger (if/then/else)" (which is selected). Under the "Trigger (if/then/else)" tab, there are three dropdown menus: "Select a Trigger.....", "Then Do Action.....", and "Else Do Action.....". A blue "Add" button is located at the bottom right.



## Triggering the Start of an Automation

The first command in your automation has some additional options. You can trigger an automation to start based on a member; clicking a link, visiting a page URL, logging in, registering (for the first time), clicking a form submit button. You can also trigger based on engagement score, last login, total IP addresses used, account creation date, and total logins to date. Note – the user login and user registration options will only appear on the first node of the automation.



## Automation Node “Do Action” Commands

As mentioned there are many options within each Automation Node. Selecting the Do Action tab will display a dropdown box where you can select from a number of Do Action Automations. The following section describes each of these Do Action commands. The include;

1. Add Tags - When someone hits this point in the automation, you can automatically add any number of tags to the member.
2. Remove Tags - When someone hits this point in the automation, you can automatically remove any number of tags to the member.
3. Add Membership - When someone hits this point in the automation, you can automatically add them to any level(s) in your membership site. **Note – this command works with approved membership site plugins only.**
4. Remove Membership - When someone hits this point in the automation, you can automatically remove them to any level(s) in your membership site. **Note – this command works with approved membership site plugins only.**
5. Send Email - When someone hits this point in the automation, you can trigger an email to that member.
6. Wait - When someone hits this point in the automation, you can specify a wait period before the next node in the automation is triggered.
7. End Automation - Use this command to end each automation.

## Automation Node “Conditional” Commands

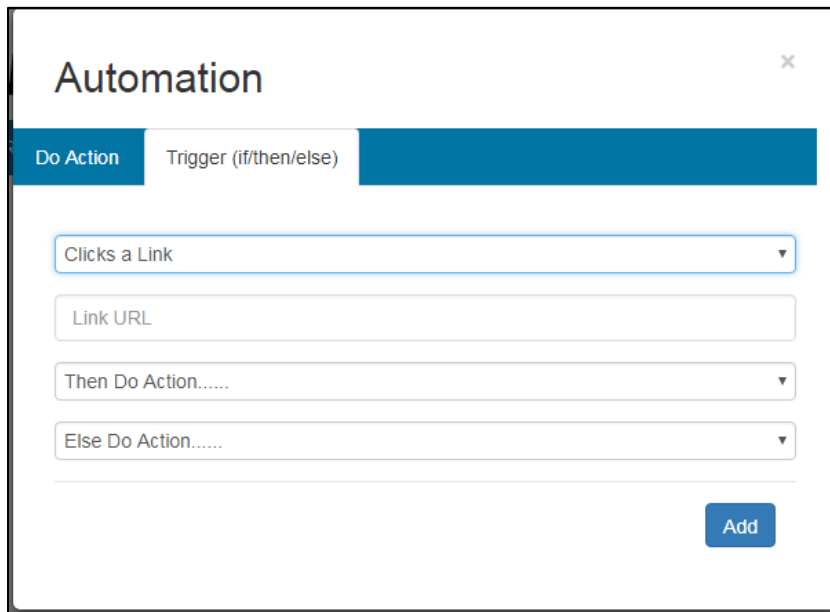
Selecting the Conditional Automation tab will display a dropdown box where you can select from a number of Conditional Automations. The following section describes each of these Conditional commands.

These include;

1. Clicks a Link
2. Visits a Page
3. User Comments
4. Clicks Form Submit
5. Is tagged with
6. Is NOT tagged with
7. Engagement Score is greater than
8. Last Logged in is greater than
9. Total IP addresses used is greater than
10. Account Created is greater than
11. Total Logins To Date is greater than

## 1. Clicks a Link

Use this command to execute a do automation if someone clicks on a specific link within your membership site.



The screenshot shows a modal window titled "Automation" with a close button (x) in the top right corner. Below the title is a navigation bar with two tabs: "Do Action" (highlighted in blue) and "Trigger (if/then/else)". The main content area contains four input fields: a dropdown menu with "Clicks a Link" selected, a text input field for "Link URL", a dropdown menu for "Then Do Action.....", and another dropdown menu for "Else Do Action.....". At the bottom right of the form is a blue "Add" button.

## 2. Visits a Page

Use this command to execute a do automation if someone visits a specific page in your membership site.

### Automation ×

Do Action    Trigger (if/then/else)

Visits a Page ▼

Page URL

Then Do Action..... ▼

**Add**

### 3. User Comments

Use this command to execute a do automation if someone submits a comment on a page/post. Enter the post/page ID number in the field.

### Automation ×

Do Action    Trigger (if/then/else)

User Comments ▼

Post/Page ID. Comma separate multiple.

Then Do Action..... ▼

**Add**

## 4. Clicks Form Submit

Use this command to execute a do automation if someone submits a form by clicking on a form button (you must copy/paste the CSS class into your form button).

### Automation ×

**Do Action**    **Trigger (if/then/else)**

Click Form Submit ▼

Submit Button Class

**Generate Class** Copy/Paste this unique string to your Submit Button's class

Then Do Action..... ▼

Else Do Action..... ▼

**Add**

## 5. Is Tagged With

Use this command to execute a do automation when someone has a specific tag.

### Automation ×

Do Action    Trigger (if/then/else)

Is tagged with ▾

- ▾

FREE Membership  
Imported Member  
Member  
[CANC] One Result Agency ▾

Then Do Action..... ▾

Else Do Action..... ▾

**Add**

## 6. Is Not Tagged With

Use this command to execute a do automation when someone does NOT have a specific tag.

### Automation ×

Do Action    Trigger (if/then/else)

Is NOT tagged with ▾

- ▾

FREE Membership  
Imported Member  
Member  
[CANC] One Result Agency ▾

Then Do Action..... ▾

Else Do Action..... ▾

**Add**

## 7. Engagement Score is Greater than

Use this command to execute a do automation when someone does NOT have a specific tag.



### Automation ×

**Do Action**   Trigger (if/then/else)

Engagement Score is greater than ▾

Engagement Score

Then Do Action..... ▾

Else Do Action..... ▾

**Add**

## 8. Last Login is Greater than

Use this command to execute a do automation when someone does NOT have a specific tag.

### Automation ×

**Do Action**   Trigger (if/then/else)

Last Logged in is greater than ▾

dd/mm/yyyy

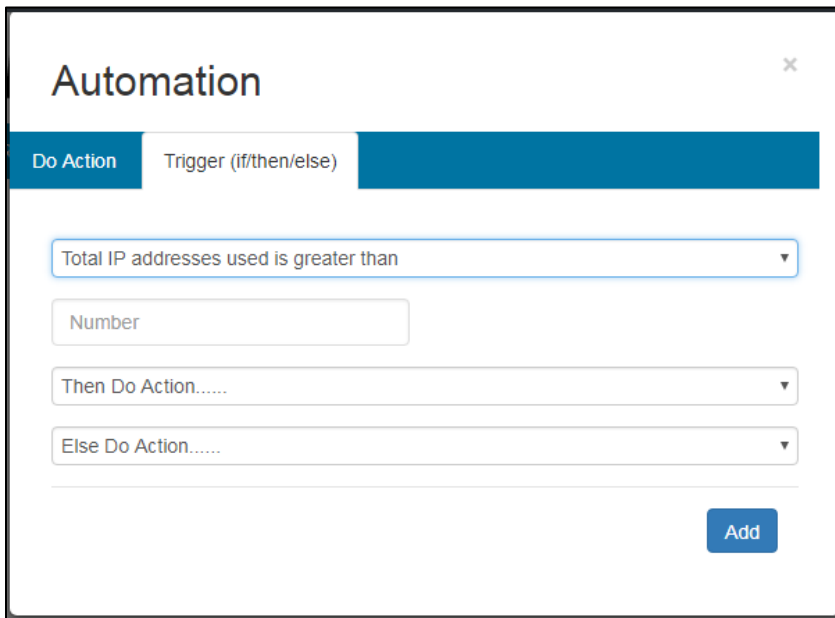
Then Do Action..... ▾

Else Do Action..... ▾

**Add**

## 9. Total IP Addresses Used is Greater than

Use this command to execute a do automation when someone does NOT have a specific tag.



The screenshot shows the 'Automation' configuration window. It has two tabs: 'Do Action' and 'Trigger (if/then/else)'. The 'Trigger (if/then/else)' tab is selected. The configuration includes a dropdown menu with the text 'Total IP addresses used is greater than', a text input field containing 'Number', a dropdown menu for 'Then Do Action.....', and another dropdown menu for 'Else Do Action.....'. A blue 'Add' button is located at the bottom right of the configuration area.

## 10. Account Created is Greater than

Use this command to execute a do automation when someone does NOT have a specific tag.

### Automation ×

**Do Action** Trigger (if/then/else)

Account Created is greater than ▼

dd/mm/yyyy

Then Do Action..... ▼

Else Do Action..... ▼

**Add**


## 11. Total Logins To Date is Greater than

Use this command to execute a do automation when someone does NOT have a specific tag.

### Automation ×

**Do Action** Trigger (if/then/else)

Total Logins To Date is greater than ▼

Number 

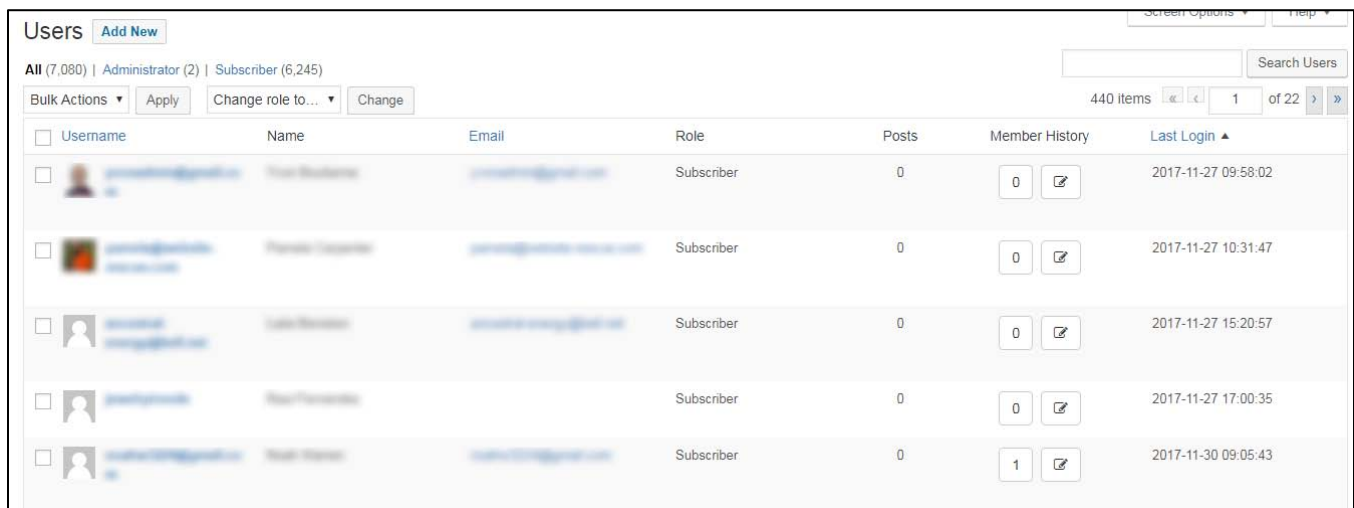
Then Do Action..... ▼

Else Do Action..... ▼

**Add**

## Member History

WP Smart Tags adds a few columns to the default WordPress User listing. Clicking on any number under the Tag Count or Automation Count columns will display the list of Tags/Automations for that member.

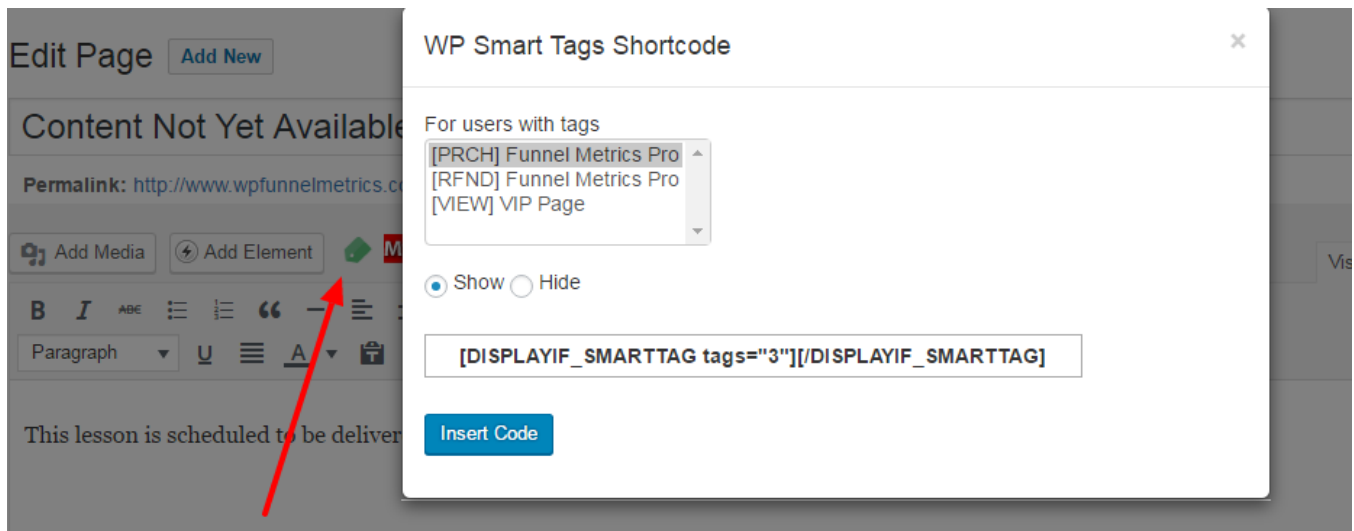


<input type="checkbox"/>	Username	Name	Email	Role	Posts	Member History	Last Login ▲
<input type="checkbox"/>		Test Member	test@wp.com	Subscriber	0	0	2017-11-27 09:58:02
<input type="checkbox"/>		Test Member	test@wp.com	Subscriber	0	0	2017-11-27 10:31:47
<input type="checkbox"/>		Test Member	test@wp.com	Subscriber	0	0	2017-11-27 15:20:57
<input type="checkbox"/>		Test Member	test@wp.com	Subscriber	0	0	2017-11-27 17:00:35
<input type="checkbox"/>		Test Member	test@wp.com	Subscriber	0	1	2017-11-30 09:05:43

## On Page/Post Settings

### Show/Hide Content

Content can be shown/hidden on each page/post and only displayed if the user has a tag(s). Click on the tag icon to display the shortcode options. Select the tag(s) and enter the shortcode on the page/post. Insert the content between the opening and closing of the tag.



### Page/Post Redirect

A page/post can be automatically redirected if that member has any of the tags selected in the command below. This function is located on each page/post editor screen on the right hand column.

WP Smart Tags ▲

**Redirect to:**

Select Page ▼











**For users with tags:**

1st Reward ▲  
2ndReward  
3rd Reward  
ADD when user ADDED 1 ▼

## Additional Shortcodes

You can also insert our Engagement shortcode into the page/post editor to display the top 10 most engagement members on your membership site. Use this shortcode: **[WPST\_TOP10USERS width="500px" height="300px"]**

Our Top Members

-  Kevin Pratt (6072 points)
-  Scott Thompson (6066 points)
-  Lanie Jones (6065 points)
-  Shondell Jones (6057 points)
-  Miike Ellis (6057 points)
-  Katie Coppenrath (6056 points)
-  Roxane Thomas (154 points)
-  Alex Janetech (134 points)
-  Sarah Poindexter (78 points)
-  Anna Mae Martin (66 points)

## Primary / Secondary Menus

Primary and secondary navigation menus can be controlled using Smart Tags. Adding a tag to a menu item will cause the menu item to only be displayed to a member if they have that particular tag.

Menu Name

### Menu Structure

Drag each item into the order you prefer. Click the arrow on the right of the item to reveal additional configuration options.

free reg Page ▲

*Navigation Label*

*Title Attribute*

*WP Smart Tags*

**Menu 1 X**

Move [Down one](#)

Original: [free reg](#)

[Remove](#) | [Cancel](#)

Tutorials Page ▼

After Login Page OTO Page ▼

## Widgets

Widgets can be conditionally displayed (or hidden) if the member has any of the tags selected.

Custom Menu ▲

Title:

Select Menu: Nav ▼

WP Smart Tags:  
Select ▼

If user is tagged with (atleast one) :

- [PRCH] Funnel Metrics Pro ▲
- [PRCH] Funnel Metrics Single
- [RFND] Funnel Metrics Pro
- [VIEW] VIP Page ▼











**Membership Content**

[Delete](#) | [Close](#) Save

You can also insert our Engagement shortcode into a text widget to display the top 10 most engagement members on your membership site. Use this shortcode: **[WPST\_TOP10USERS]**



### Our Top Members

-  Kevin Pratt (6072 points)
-  Scott Thompson (6066 points)
-  Lanie Jones (6065 points)
-  Shondell Jones (6057 points)
-  Miike Ellis (6057 points)
-  Katie Copenrath (6056 points)
-  Roxane Thomas (154 points)
-  Alex Janetech (134 points)
-  Sarah Poindexter (78 points)
-  Anna Mae Martin (66 points)

## Feedback

We love what we do and value your input. If you have feedback... good or bad... please let us know!  
I'd love to hear from you.

Thank you for your continued business.



Andrew Hunter  
Founder of **Plugin Results**