Progressive Profiling

User Manual

Introduction

Progressive Profiling is a WordPress plugin that enables site owners to gradually capture form entries from site visitors over time.

The plugin works by collecting information in a progressive way, as opposed to presenting a form with too many fields which the user will be less likely to fill in and submit. This means that on each page load only a subset of the available form fields will be presented to the user, which is then tracked across multiple sessions in order to aggregate the captured data under the same lead.

Progressive Profiling also has extensive customization capabilities allowing administrators to build bespoke user personas that fit their desired analytics indices.
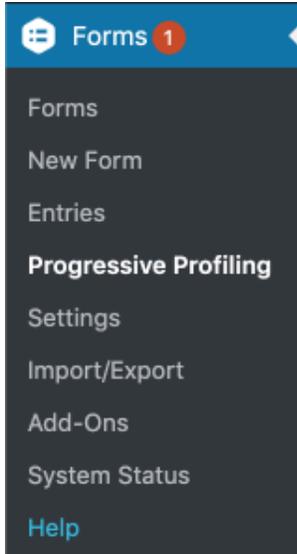
Requirements

Progressive Profiling needs the following minimum requirements in order to ensure optimal usage:

- **PHP** version **7** or greater

- **WordPress** version **5.1** or greater

- **GravityForms** version **2.5.0** or greater

Installation

1. Navigate to the Crowd Favorite Shop and purchase a license that fits your needs.
2. After purchase, you'll get an email with your license key as well as the plugin archive file.
3. Install the plugin as usual through the WordPress Dashboard and activate it on your website.
4. Once the plugin has been activated, click on 'Forms > Progressive Profiling` to activate the license for your current website.

Forms 1

Forms
New Form
Entries
Progressive Profiling
Settings
Import/Export
Add-Ons
System Status
Help

Progressive Profiling

Details

Enable Progressive Profiling from the form settings page. You may then configure Progressive Profiling for a given field in the field's settings.
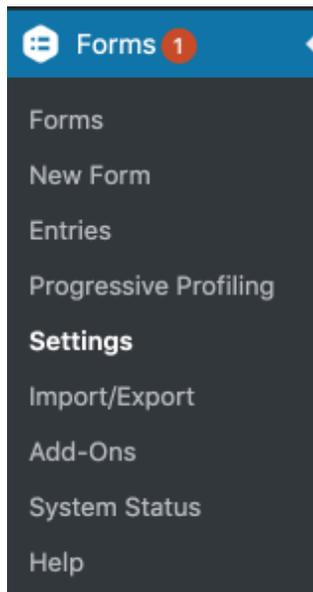
Updates

Input your license key to receive updates.

License key

Save Changes

Usage
General Settings

Progressive Profiling settings are found on the settings page for Gravity Forms, under the Progressive Profiling tab, seen below:
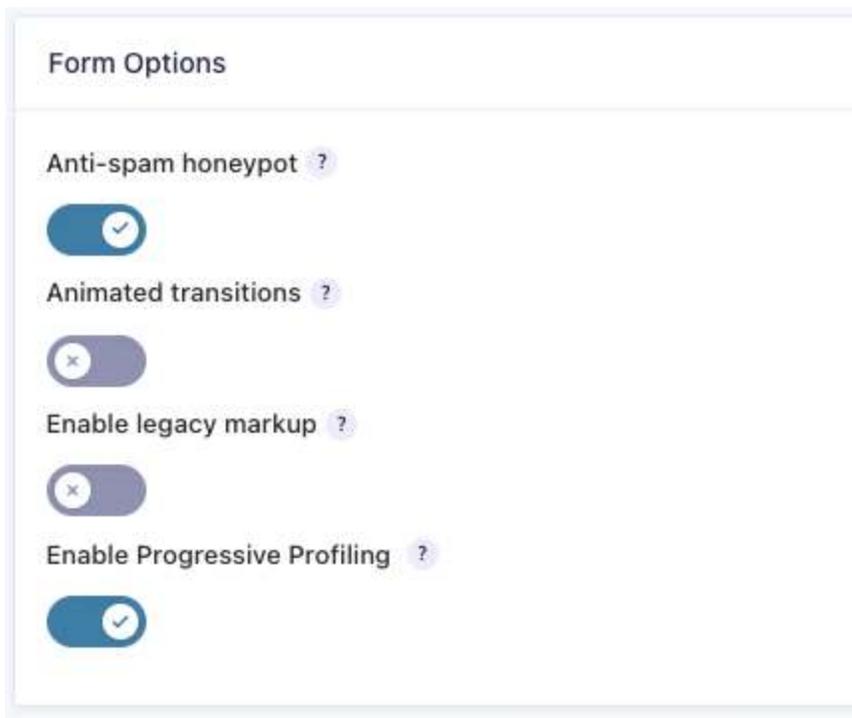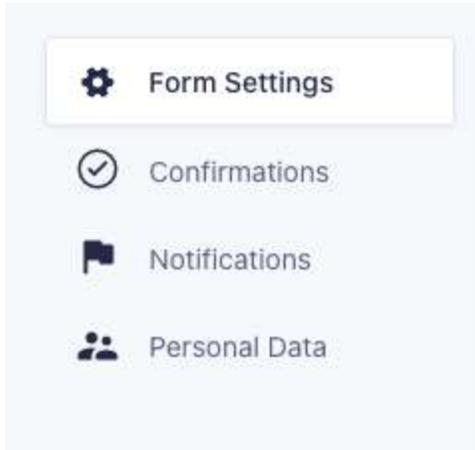

On the general settings page there are several options available to you:

- You may choose to save profiling data either in a cookie, which is the default behavior, or directly in the database, organized by the user's IP address.
- You may also choose to delete the Progressive Profiling data from the database.

Form Settings

In order to activate Progressive Profiling for your desired form, navigate to the desired form's settings and enable the Progressive Profiling setting, as seen below:

Field Settings

Progressive Profiling field settings can be found in the Edit screen, under the Progressive Profiling tab of each of your fields, as seen below:

Several powerful conditional settings are available here:

- *If this field has been previously submitted*

  With this setting you can decide what happens to a field previously submitted. Your options are:

  - ➜ Show the field again, with no value preset
  - ➜ Show the field again, with the previously entered value prefilled
  - ➜ Do not show the field again on the frontend, only show it on entries and notifications
  - ➜ Do not show the field again on the frontend, hide it from entries and notifications

- *Only show this field if*

  With this setting you can apply conditional visibility rules to the field.

  You can select as many existing fields as desired, as well as deciding if all or any of the selected fields should be completed before displaying the progressive field.

Entries Page

A new section will be available on your entries page, displaying relevant Progressive Profiling information, as seen below:

Developer Notes

Need to disable/control cookie usage? The *cf_dxp_prop_gdpr_allow_cookie* hook controls if a cookie is set during form submission. One way to comply with GDPR and similar requirements might be to use a checkbox that acknowledges and authorizes the progressive profiling cookie, so you could check the form contents for that checkbox and filter this value accordingly.