

ADD A SUBSCRIPTION SOLUTION TO YOUR WEBSITE WITH GRAVITY FORMS AND STRIPE

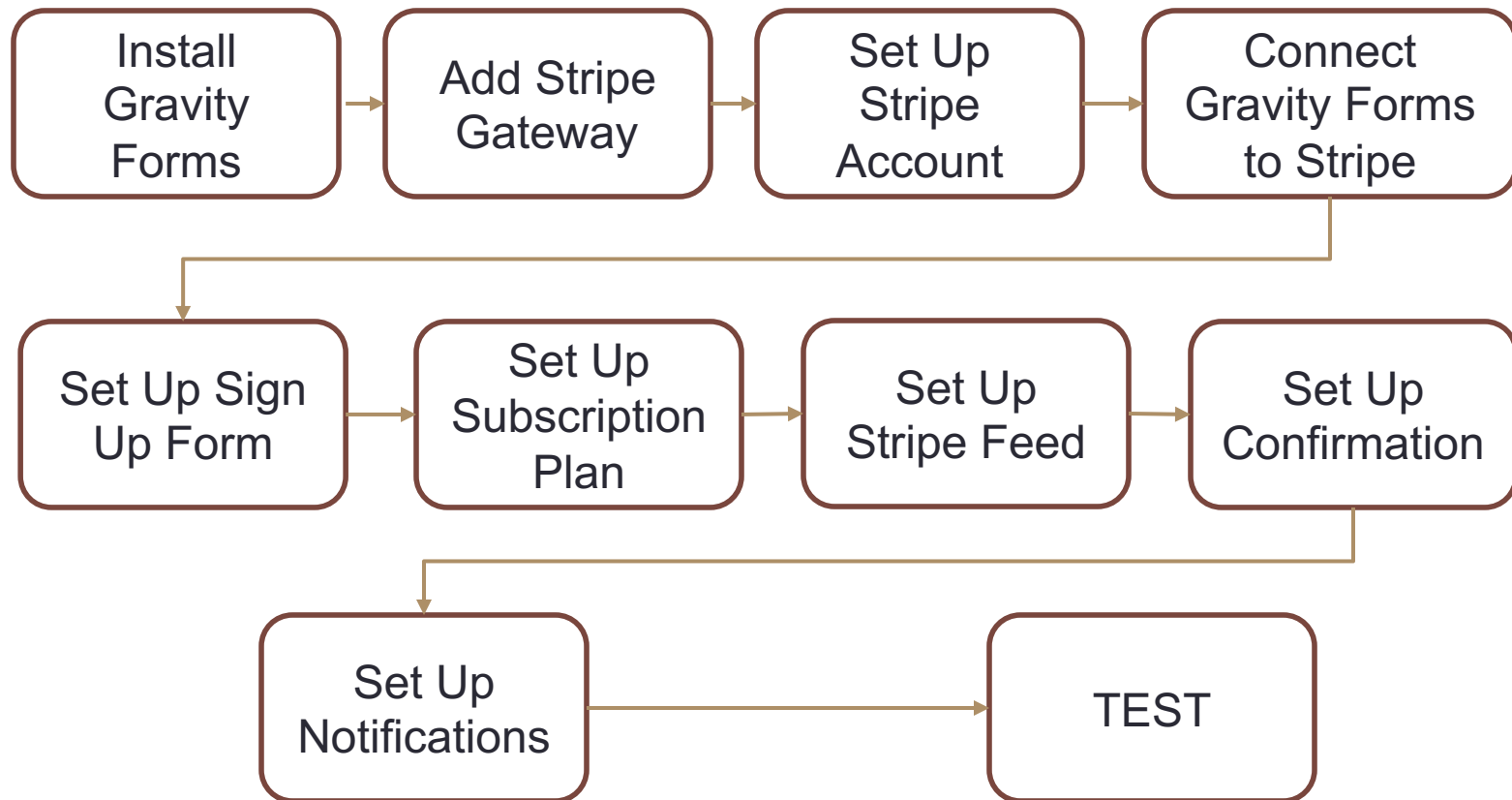
WordCamp Montclair
June 1, 2019

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Agenda

- General Gravity Forms Overview
- Why Subscriptions
- Set Up Stripe Payment Processing
- Set Up a Subscription Signup Form
- Set Up Confirmation and Notifications
- Useful Tips and Resources

Today's Roadmap



Gravity Forms

- Premium Plugin by Rocketgenius
 - Gravityforms.com
 - Some Add-ons Require Elite License @ \$259/year (unlimited websites)
 - Excellent Support
 - Gravityplus.pro
 - Works with Basic Gravity Forms license \$59
 - Gravity Forms Features
 - Form Builder*
 - Form Fields*
 - Conditional Logic*
 - Order Forms*
 - Entry Management
 - Notifications*
 - Styles & Layout
 - WordPress Integration
- * Important for today's topic

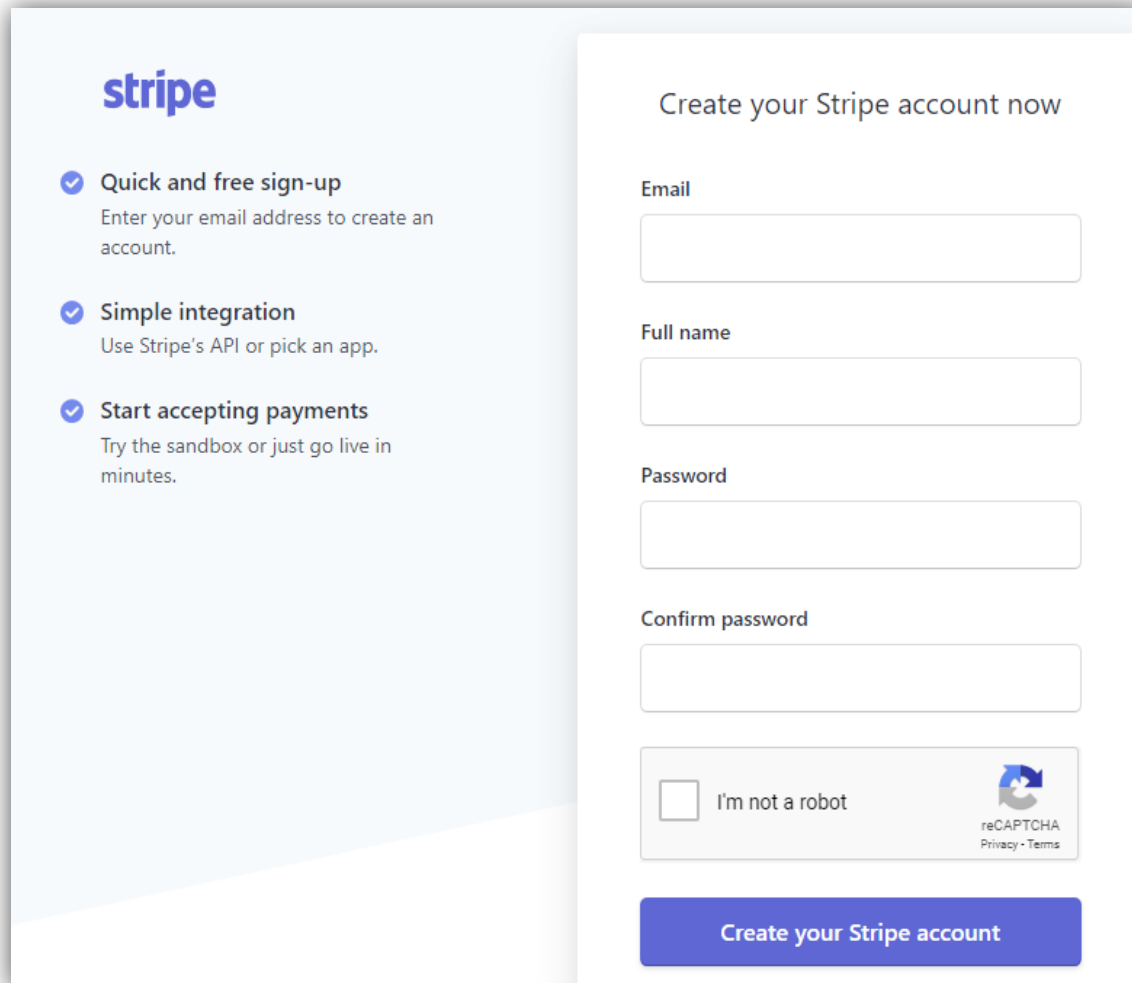
Subscription Examples

- Website Care Plans
- Recurring Monthly Donations (not for profits love this!)
- Dues Payments
- Payments Over Time – Payment Plans
- Membership Sites
- Restricted Access

Get Ready For Your Form

- *Tip: First Define What Information You Want to Gather and What To Do With It*
- Set up Outside Accounts
 - Payment Gateway (Stripe)
 - *Tip: Emailing Marketing Service (Mailchimp)*
- Identify Demographic Information
- Define Subscription Plans
- Consider Conditional Form Fields
- Create Confirmation Messages and Notifications
- Determine Where the Form Will Live

Set Up and Connect Stripe



The screenshot shows the Stripe account creation interface. On the left, the Stripe logo is at the top, followed by three bullet points: 'Quick and free sign-up' (with a checkmark), 'Simple integration' (with a checkmark), and 'Start accepting payments' (with a checkmark). Each bullet point has a short descriptive sentence below it. The main form area on the right is titled 'Create your Stripe account now' and contains several input fields: 'Email', 'Full name', 'Password', and 'Confirm password'. Below these fields is a reCAPTCHA section with a checkbox labeled 'I'm not a robot' and the reCAPTCHA logo. At the bottom of the form is a large blue button labeled 'Create your Stripe account'.

Stripe.com to sign up

No fee unless you use it

Connect Stripe to a Bank

Ask Clients to add you as a Developer
Settings > Team members

Stripe in WordPress

The screenshot displays the WordPress admin interface for the Stripe Settings page. On the left sidebar, the 'Settings' menu item is highlighted with a red circle containing the number '1'. Below it, the 'Stripe' menu item is also highlighted with a red circle containing the number '2'. The main content area is titled 'Stripe Settings' and features a sub-section for 'Stripe API'. In this section, the 'API' type is set to 'Live' (indicated by a selected radio button). Below this, there are four key-value pairs: 'Test Publishable Key' with the value 'pk_test_o6g45Vy1SJULbqbTKFF', 'Test Secret Key' with a masked value (indicated by a red circle '3'), 'Live Publishable Key' with the value 'pk_live_zSshiTad9wUUAmoBv6>', and 'Live Secret Key' with a masked value. Each key field has a green checkmark to its right, indicating that the keys are valid.

Stripe API Keys

MESH Business Sol... Search...

Home
Payments
Balance
Customers
Radar
Billing
Connect
Orders
Developers
API keys
Webhooks
Events
Logs
View test data

API keys

[Learn more about API authentication →](#)

Viewing live API keys. Toggle to view test keys. **3** View test data

Standard keys

NAME	TOKEN	LAST USED	CREATED
2 Publishable key	pk_live_zSshiTad9wUUAmoBv6XuiBhz	May 15, 2019	Jan 24, 2017
Secret key	<input type="text" value="Reveal live key token"/>	May 15, 2019	Jan 24, 2017

Restricted keys

[+ Create restricted key](#)

NAME	TOKEN	LAST USED	CREATED
No restricted keys			

WordPress to Stripe Webhooks

Stripe Webhooks

Gravity Forms requires the following URL to be added to your Stripe account's list of Webhooks for each API mode you will be using. [View Instructions](#) ←

1. Click the following link and log in to access your Stripe Webhooks management page:
<https://dashboard.stripe.com/account/webhooks>
2. Click the "Add Endpoint" button above the list of Webhook URLs.
3. Enter the following URL in the "URL to be called" field: `https://meshwpsupport.com/?callback=gravityformsstripe`
4. If offered the choice, select the latest webhook version.
5. Select "Send all event types".
6. Click the "Add Endpoint" button to save the webhook.

Webhooks Enabled? * I have enabled the Gravity Forms webhook URL in my Stripe account.

Test Signing secret

Live Signing secret

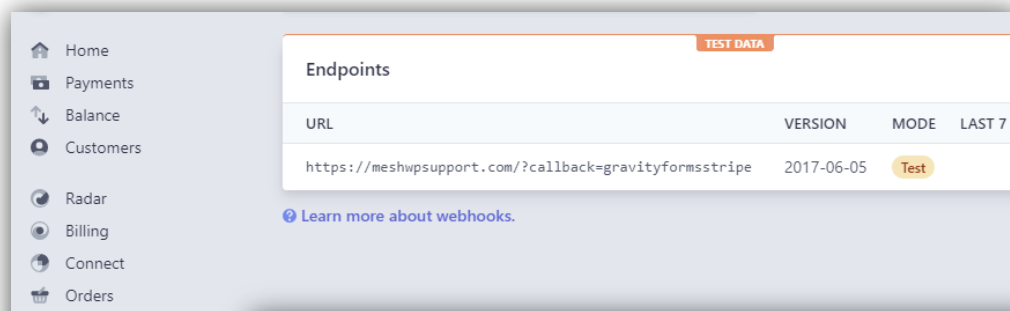
[Update Settings](#)

Set up Live and Test Webhooks

Allows website to communicate with Stripe on future transactions

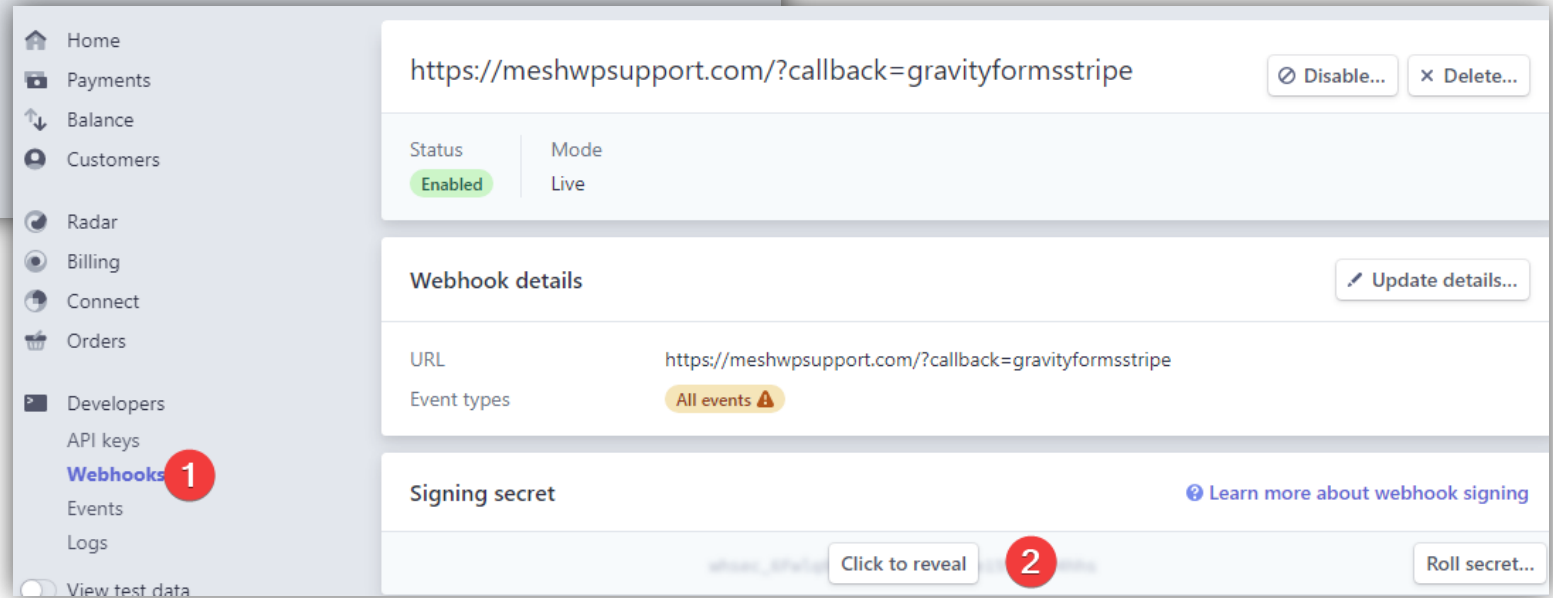
Stripe Endpoints – Live and Test

Set up Live and Test so you can!



A screenshot of the Stripe dashboard showing a list of endpoints. The interface includes a sidebar with navigation options like Home, Payments, Balance, Customers, Radar, Billing, Connect, Orders, and Developers. The main content area is titled 'Endpoints' and has a 'TEST DATA' indicator. It displays a table with columns for URL, VERSION, MODE, and LAST 7 D. One endpoint is listed with the URL 'https://meshwpsupport.com/?callback=gravityformsstripe', version '2017-06-05', and mode 'Test'. A link to 'Learn more about webhooks.' is visible below the table.

URL	VERSION	MODE	LAST 7 D
https://meshwpsupport.com/?callback=gravityformsstripe	2017-06-05	Test	



A screenshot of the Stripe dashboard showing the details of a specific endpoint. The interface includes a sidebar with navigation options like Home, Payments, Balance, Customers, Radar, Billing, Connect, Orders, and Developers. The main content area shows the URL 'https://meshwpsupport.com/?callback=gravityformsstripe' and buttons for 'Disable...' and 'Delete...'. Below this, the status is 'Enabled' and the mode is 'Live'. The 'Webhook details' section shows the URL and event types set to 'All events'. The 'Signing secret' section has a 'Click to reveal' button and a 'Roll secret...' button. Red circles with numbers 1 and 2 highlight the 'Webhooks' menu item and the 'Click to reveal' button, respectively.

https://meshwpsupport.com/?callback=gravityformsstripe

Disable... Delete...

Status: Enabled Mode: Live

Webhook details Update details...

URL: https://meshwpsupport.com/?callback=gravityformsstripe

Event types: All events

Signing secret Learn more about webhook signing

Click to reveal Roll secret...

Choose Payment Collection Method

Payment Collection

Select how payment information will be collected. You can choose the classic "Credit Card" option to use the native Gravity Forms credit card field or select one of the Stripe hosted solutions (Stripe Credit Card or Stripe Checkout) which simplifies the PCI compliance process with Stripe.

Payment Collection Method

- Gravity Forms Credit Card Field [?](#)
- Stripe Credit Card Field (Elements) [?](#)
- Stripe Payment Form (Stripe Checkout) [?](#)

Use Stripe Hosted Collection Method
or Gravity Form Field

Gravity Forms Form Fields

Standard Fields ?

Single Line Text	Paragraph Text
Drop Down	Multi Select
Number	Checkboxes
Radio Buttons	Hidden
HTML	Section
Page	

Pricing Fields ?

Product	Quantity
Option	Shipping
Total	Credit Card

Advanced Fields ?

Name	Date
Time	Phone
Address	Website
Email	File Upload
CAPTCHA	List
Consent	Terms of Service
Unique ID	

Simple Subscription Form

- Name
- Address
- Phone
- Email
- Product
- Total

WordCamp Subscription Form

Name

First Last

Address

Street Address

Address Line 2

City State / Province / Region

ZIP / Postal Code Country

Email


Phone

If you subscribe before midnight tonight, your subscription will start with no additional upfront fee!

Best Subscription Plan Ever
Price: **\$10.00**

Total Due Today
\$10.00

Credit Card



Card Number

Month Year Security Code

Expiration Date

Cardholder Name

Viewport (Width : 1092px , Height : 110

Behind the Scenes

Set your Price
or
User Defined Price

The screenshot shows a product configuration window titled "Product : Field ID 5". The product name is "Best Subscription Plan Ever" and its price is set to "\$10.00". The interface has three tabs: "General", "Appearance", and "Advanced". The "General" tab is active and contains the following fields:

- Field Label**: A text input field containing "Best Subscription Plan Ever".
- Description**: A large empty text area.
- Field Type**: A dropdown menu with "Single Product" selected. The dropdown list includes: "Single Product", "Drop Down", "Radio Buttons", "User Defined Price", "Hidden", and "Calculation".
- Rules**: Two checkboxes, both unchecked: "Required" and "No Duplicates".

Set Up the Stripe Feed

Subscription Settings

Recurring Amount * Monthly Care Plan with Hosting

Billing Cycle 1 month(s)

Setup Fee Enabled

Trial Enabled

Other Settings

Customer Information

Email * Email

Description Select a Field

Coupon Select a Field

Metadata Select a Field +

Conditional Logic

Enable Condition

Process this feed if All of the following match:

Name (First) is Enter a value +

Update Settings

Monthly Care Plan with Hosting ID: 5

Edit Settings Entries Sales Preview

Form Settings

Confirmations

Notifications

Personal Data

PayPal Payments Pro

Stripe

Feed Settings

Name * Care Plan with Hosting

Transaction Type Subscription

Select a transaction type

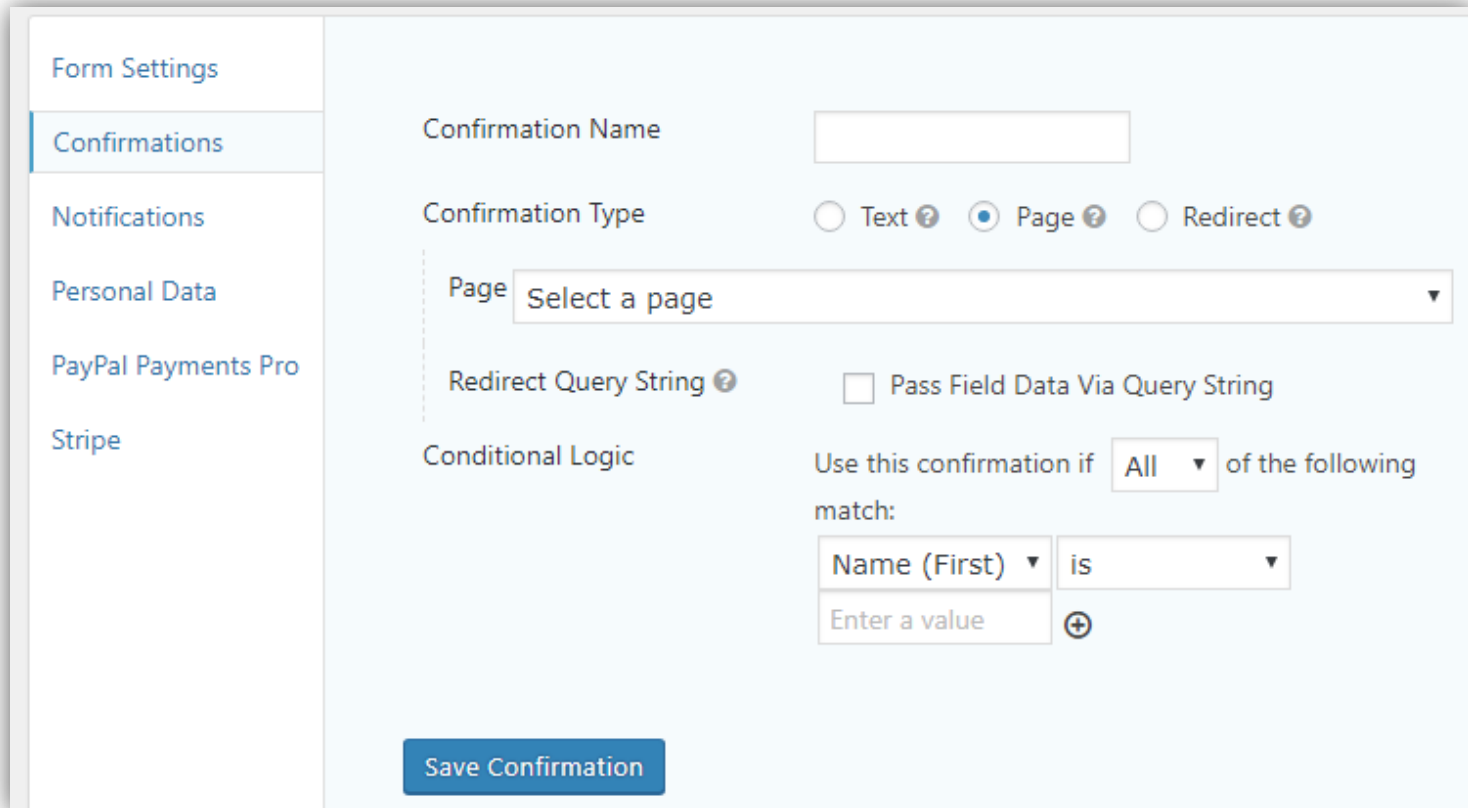
Products and Services

Subscription

Subscription Settings

Confirmation – After Form Submission

- Confirmation can be a Message, a Page or a Redirect



The screenshot shows a settings panel for form confirmations. On the left is a sidebar with menu items: Form Settings, Confirmations (selected), Notifications, Personal Data, PayPal Payments Pro, and Stripe. The main area contains the following fields:

- Confirmation Name:** An empty text input field.
- Confirmation Type:** Three radio buttons: Text (unselected), Page (selected), and Redirect (unselected).
- Page:** A dropdown menu with the text "Select a page".
- Redirect Query String:** A text input field with a help icon.
- Pass Field Data Via Query String:** An unchecked checkbox.
- Conditional Logic:** A section titled "Use this confirmation if" followed by a dropdown menu set to "All" and the text "of the following match:". Below this are two rows of dropdown menus: the first row has "Name (First)" and "is"; the second row has "Enter a value" and a plus icon (+).

At the bottom of the panel is a blue button labeled "Save Confirmation".

Notifications – Which Ones?

The screenshot shows a notification configuration interface for a form titled "Monthly Care Plan with Hosting" (ID: 5). The interface includes a sidebar with navigation options: Form Settings, Confirmations, Notifications (selected), Personal Data, PayPal Payments Pro, and Stripe. The main content area is titled "Notifications" and contains a table of existing notifications. A modal window is open, allowing the user to configure a new notification. The modal fields are:

- Name:** New Care Plan with Hosting Sign Up
- Event:** A dropdown menu is open, showing the following options: Subscription Created, Form is submitted, Payment Completed, Payment Refunded, Payment Failed, Subscription Created, Subscription Canceled, Subscription Payment Added, and Subscription Payment Failed. The "Subscription Payment Failed" option is currently selected.
- Send To *:** A field with a help icon.
- Send to Field:** A label for the "Send To" field.
- Configure Routing:** A radio button and a help icon.

The table of existing notifications is as follows:

Name	Subject	Event
<input checked="" type="checkbox"/> Admin - Website Care Plan with Hosting	Yay! A new signup for the MESH Care Plan with Hosting	Subscription Created
<input checked="" type="checkbox"/> New Care Plan with Hosting Sign Up	Thank you for your MESH WP Support Website Care Plan with Hosting Subscription	Subscription Created
<input checked="" type="checkbox"/> Care Plan Monthly Payment	Thank you for your Monthly MESH WP Support Website Care Plan Payment	Subscription Payment Added
<input checked="" type="checkbox"/> failed payment	Payment Failed	Subscription Payment Failed
Name	Subject	Event

Notifications – Content

Send To * Enter Email Select a Field Configure Routing 1

Send to Field: Email

From Name: MESH WP Support

From Email: info@meshwpsupport.com 2

Reply To: info@meshwpsupport.com

BCC: mike@meshbiz.com


Subject: Thank you for your MESH WP Support Website Care Plan with Hosting Subscription

Message *

Add Media Types Visual Text

Paragraph B I [List] [Link] [Image] [Table]

ABC [Color] [Background Color] [Link] [Image] [Table]

 3

Dear {Name (First):1.3},

Thank you for signing up for your MESH WP Support Website Care Plan with Hosting Subscription. Welcome -- we're thrilled to have you!

Your card has been charged the with the first installment and will be charged every 30 days. You'll receive an additional email confirming the subscription payment.

If you have questions, get in touch on our [Support portal](#).

Thanks again for the opportunity to work with you.

Auto-formatting Disable auto-formatting 4

Conditional Logic Enable conditional logic



Ready to Go Live

- TEST the End to End Process
 - Use Test Mode on the Website and Stripe
 - Test Cards available on Stripe
 - Use Live mode with a \$1.00 Subscription
- Connect your Subscription Form
 - Pricing Table
 - Sales Page

Useful Tips & Resources

- Export Forms and Import to Other Sites
- Export Form Entries
 - All Fields or Select
- Unique Confirmations and Notifications Based on the Transaction
- Forms Can Include Other Functions
 - Mail List Signup
- Gravityhelp.com
- Gravityview.co
 - Display GF Data on the Front End
- Gravitywiz.com
 - Perks Are Add-On Functions
- Gravityplus.pro
 - Stripe Gateway

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