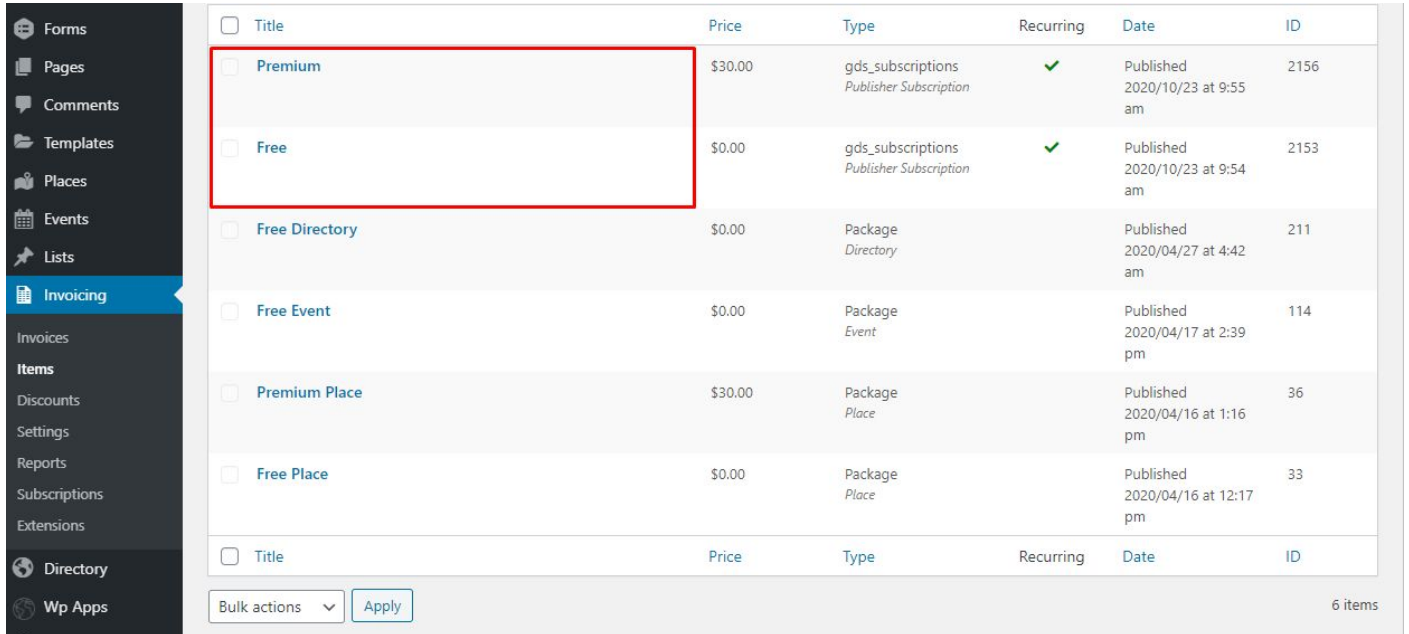## Required Plugin

- FluentCRM
- Invoicing
- GeoDirectory Pricing Manager
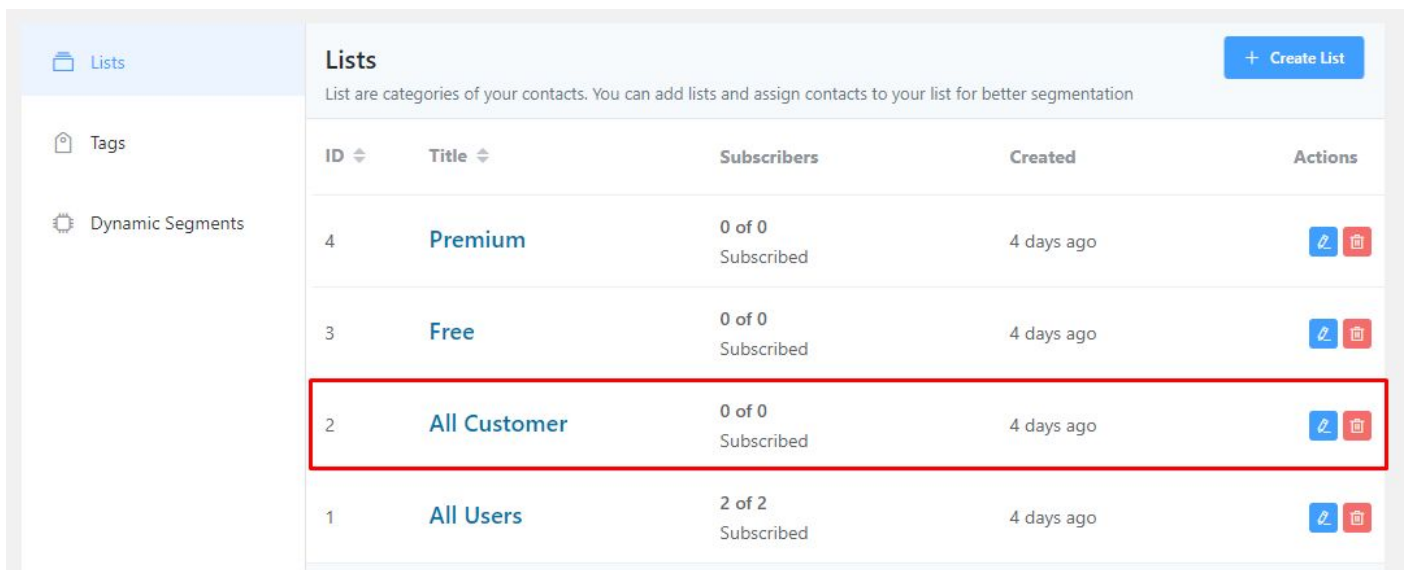- WP Perks GeoDirectory Publisher

How to add list for All Customer

- Install all required plugin
- Setup packages on CPT, just create free and premium for example. it will be included in the invoicing item

- Create a new list for "All Customer", this is for all users that purchase on invoicing. Click CRM - Dashboard - Click users - create list

How to add list for All Publisher Free

- Create a new list for "Free Subscriptions", this is for all users that purchase publisher free on invoicing. Click CRM - Dashboard - Click users - create list

How to add list for All Publisher Premium

- Create a new list for "Premium Subscriptions", this is for all users that purchase publisher free on invoicing. Click CRM - Dashboard - Click users - create list

How to setup automations

- Add automations for free subscriptions, make sure to install wpapps get paid
- Click CRM - Automations - Create a New Automations - choose GetPaid for New order publisher subscriptions

Create an Automation Funnel

Internal Label

Free subscriptions

Category

● GetPaid   ○ WordPress Triggers

Trigger

● GetPaid - New Order Publisher Subscriptions

This Funnel will start once new invoice for Publisher Subscriptions will be added

[Continue]

- Then click continue, make sure to choose the correct target products then save settings.

New Publisher Subscriptions Order has been places

This Funnel will start once new Publisher Subscriptions order will be added as successful payment

Funnel Name

Free subscriptions

Subscription Status

Subscribed

Conditions

If Contact Already Exist? ⓘ

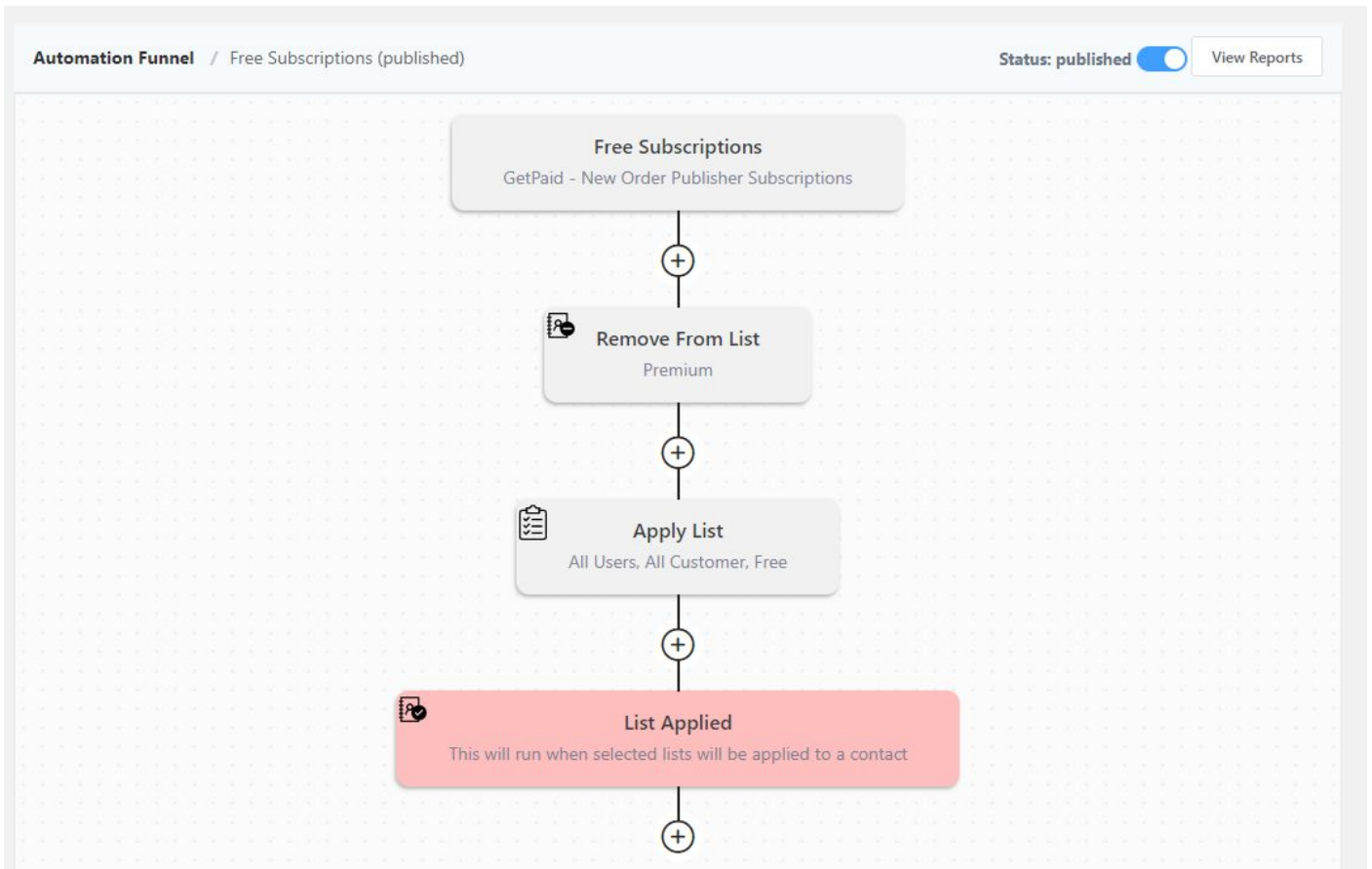🔵 Update if Exist   ⚪ Skip this automation if contact already exist

Target Products ⓘ

Free ⊗

Keep it blank to run to any product purchase

Save Settings

- Setup funnel like image below

- First remove from list, for free remove the premium list.

- Second, choose apply list and select all list exclude premium list

Apply List to the contact

Select which list will be added to the contact

×

Internal Label

Apply List

Select Lists

All Customer ⊗   Free ⊗   All Users ⊗   ∨

Save Settings

🗑

- Last, create a trigger list applied just exclude premium lists on free subscriptions. Then publish automations. Do the same to create automations of premium subscriptions.

List Applied

This will run when selected lists will be applied to a contact

×

Internal Label

List Applied

Select Lists

All Customer ⊗   Free ⊗   All Users ⊗   ∨

Run When

○ contact added in any of the selected Lists   ● contact added in all of the selected lists

Benchmark type

○ [Optional Point] This is an optional trigger point
● [Essential Point] Select IF this step is required for processing further actions

If you select [Optional Point] it will work as an Optional Trigger otherwise, it will wait for full-fill this action

Save Settings

🗑