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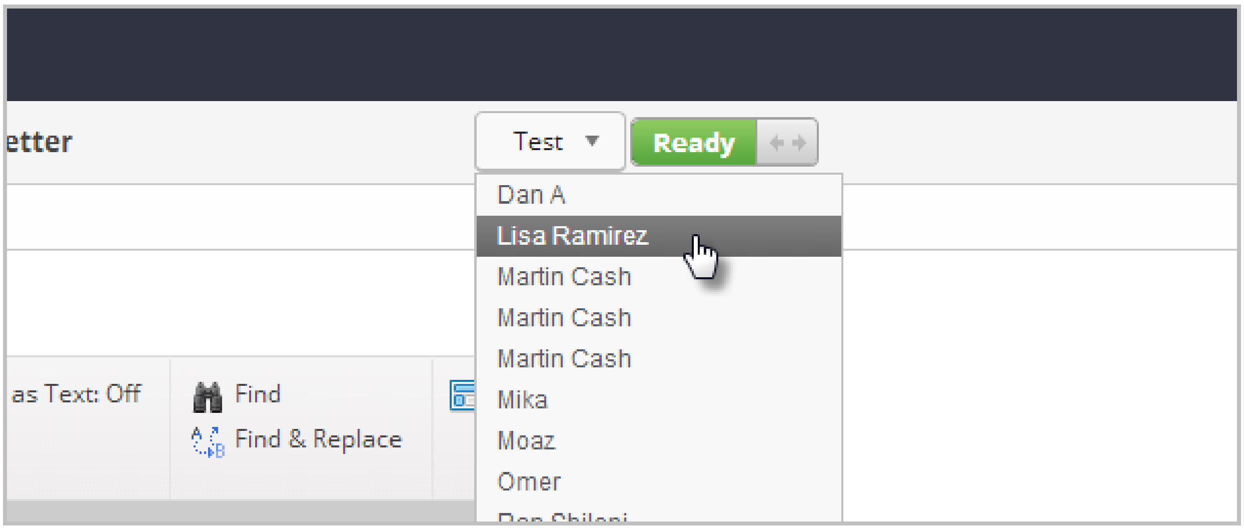
How To Test Just About Anything

Last Modified on 08/13/2018 3:59 pm MST

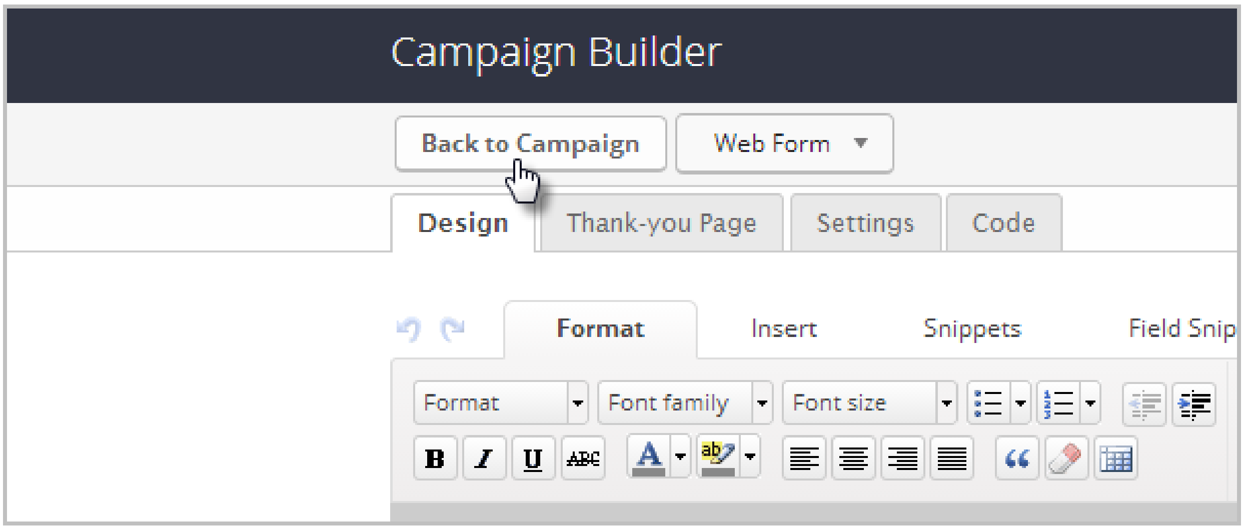
Test a web form

You can test web forms on-the-fly while you are creating them in the Campaign Builder.

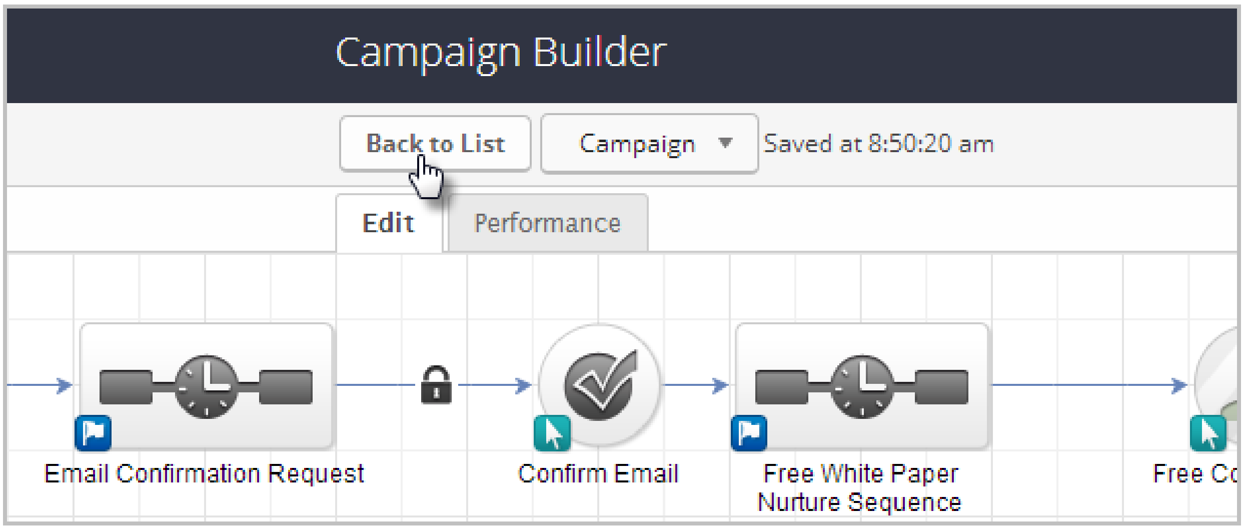
1. Make sure to publish any changes you've made to the form before you test it.
2. While viewing the web form, click the **Test** button at the top of the web form and choose your user record from the drop-down menu.



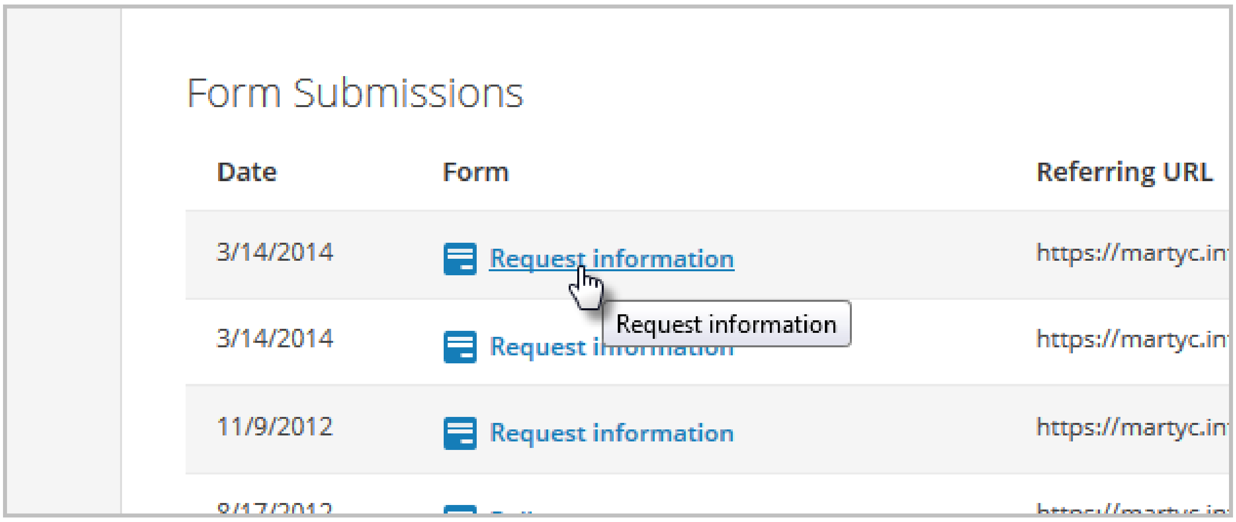
3. Fill out your form and click the **Submit** button.
4. Close the thank you page.
5. Click the **Back to Campaign** button.



6. Click the **Back to List** button.



7. Find your contact record in Infusionsoft, scroll down to the *Form Submission* section to get details on when the form was submitted and what information was obtained.



Test an Order Form

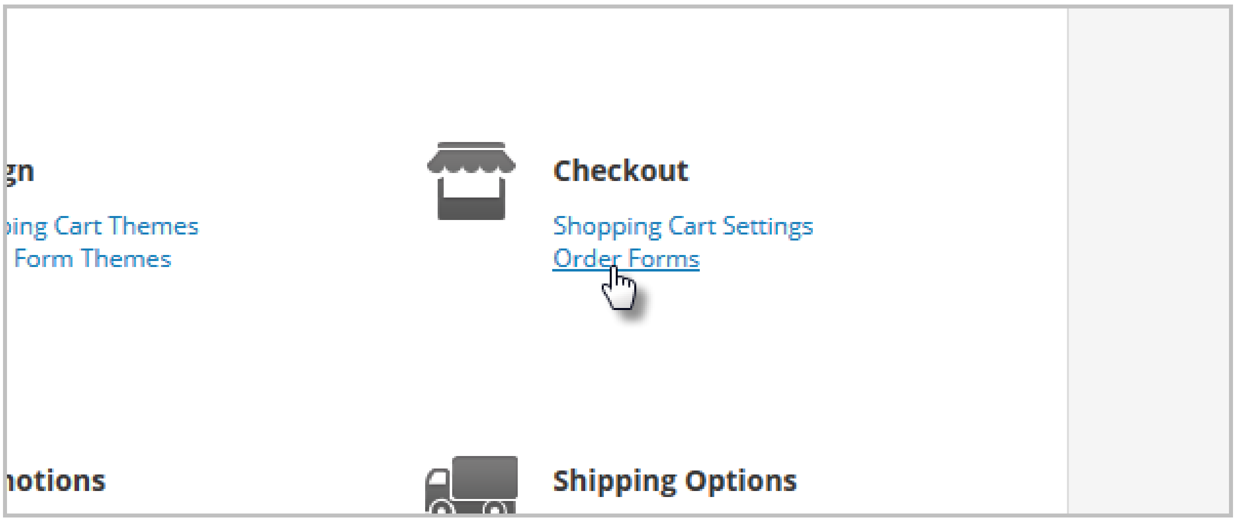
The easiest way to test an order form is to run an actual transaction with your credit card or PayPal account. If this isn't possible, and you use an Authorize.Net merchant account, you can put the Authorize.Net merchant account into "Simulator" mode and fill out the order form. In simulator mode, all transactions are approved, but no actual financial information is sent through the gateway.

> Simulator Mode Warning! Make sure not to leave your Authorize.Net merchant account in Simulator mode! Also, make sure your Authorize.Net merchant account isn't presently active on an existing order form or the shopping cart. In simulator mode, ALL transactions will always be approved!

To test an order form with an Authorize.Net account in "Simulator" mode:

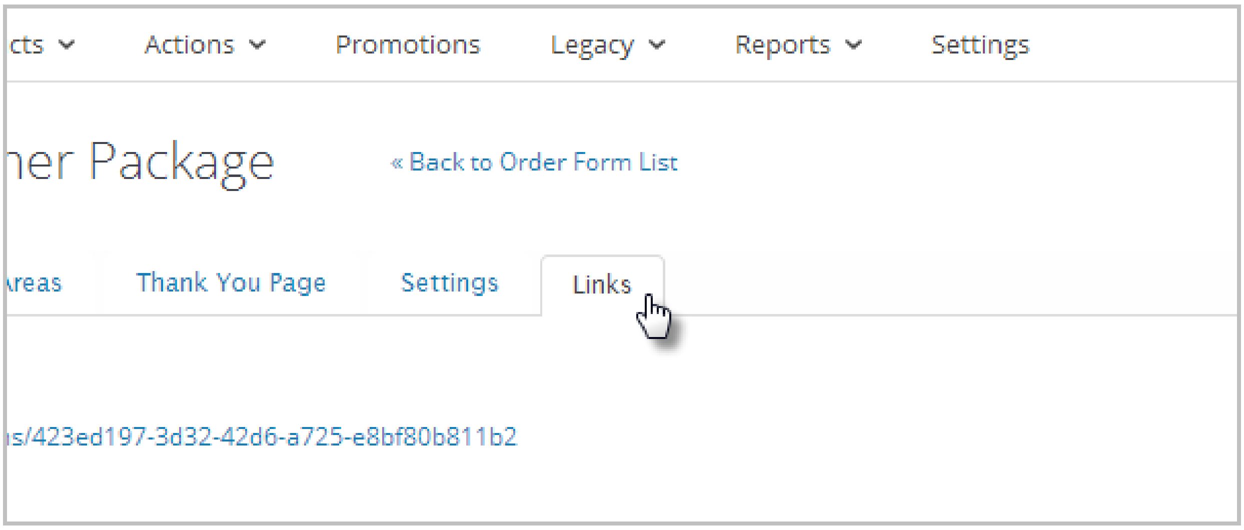
1. Go to **E-Commerce > E-Commerce Setup** in the main navigation menu.

2. Click on the **Order Forms** link.



3. Click on the name of the order form you want to test.

4. Click the **Links** tab.



5. Click on the link to open the order form.

6. Fill out the form using a test credit card number. For example, VISA; 4111111111111111; 01-2020; 123.

7. Go to the contact record in Infusionsoft and make sure the items were added correctly to the order. If the product you purchased is part of a purchase goal in a campaign, make sure the campaign goal was accomplished correctly. Also, if you have billing automation set up, check that too!

Test your Shopping Cart

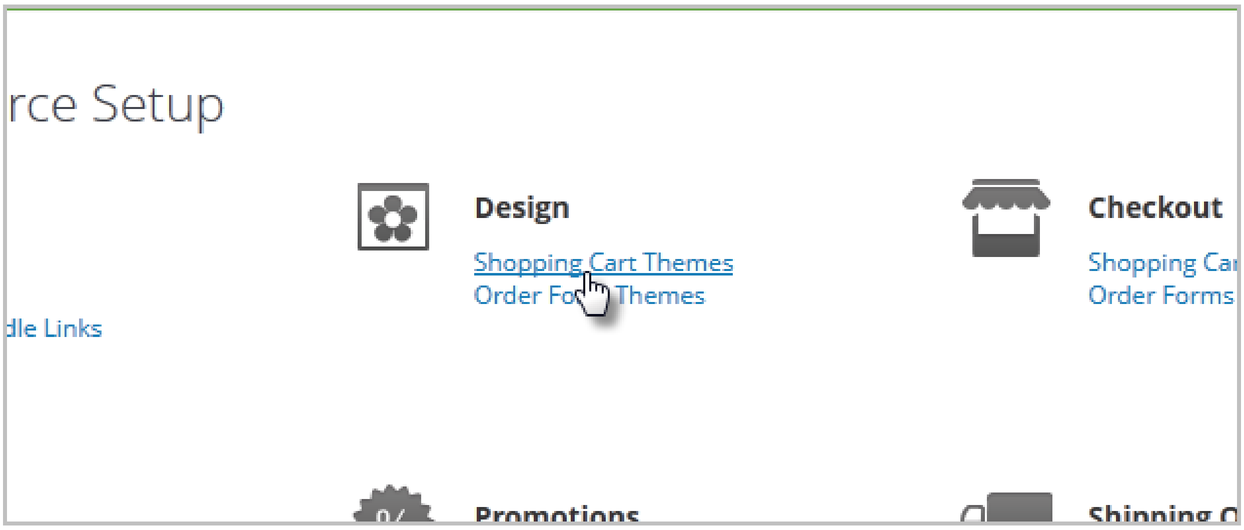
The easiest way to test your shopping cart is to run an actual transaction with your credit card or PayPal account. If this isn't possible, and you use an Authorize.Net merchant account, you can put the Authorize.Net merchant account into "Simulator" mode and fill out the shopping cart. In simulator mode, all transactions are approved, but no actual financial information is sent through the gateway.

> Simulator Mode Warning! Make sure not to leave your Authorize.Net merchant account in Simulator mode! Also, make sure your Authorize.Net merchant account isn't presently active on an existing order form or the shopping cart. In simulator mode, ALL transactions will always be approved!

To test your shopping cart with an Authorize.Net account in "Simulator" mode:

1. Go to **E-Commerce** > **E-Commerce Setup** in the master nav menu.

2. Click on the **Shopping Cart Themes** link.



3. Click on the thumbnail of your Active Theme to go to your shopping cart.

4. Add items to your cart and checkout.

5. Go to the contact record in Infusionsoft and make sure the items were added correctly to the order. If the product you purchased is part of a purchase goal in a campaign, make sure the campaign goal was accomplished correctly. Also, if you have billing automation set up, check that too.

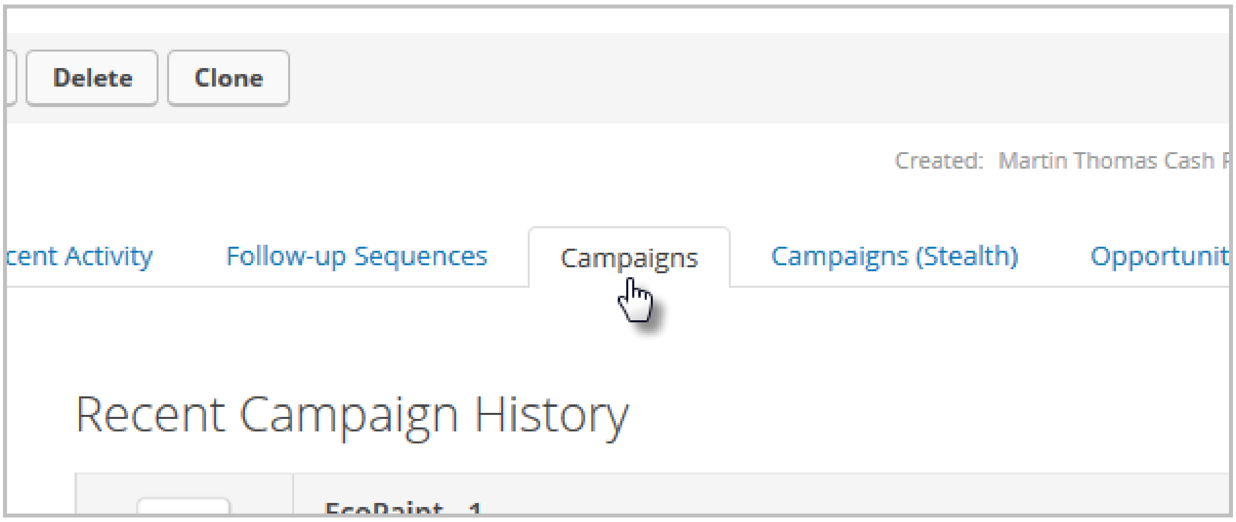
Test a Campaign

1. Go to **Marketing** > **Campaign Builder** in the main navigation menu.

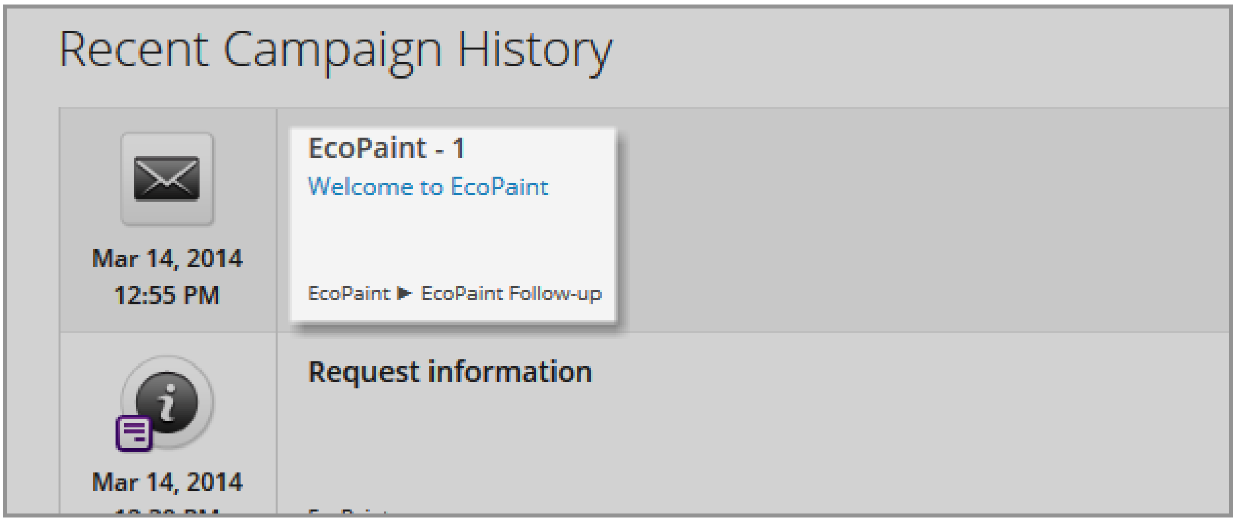
2. Click on the name of the campaign you wish to test.

3. Complete the goal that begins the campaign. For example, if the first goal of the campaign is to submit a web form or add a tag, do so now.

4. Find the contact in Infusionsoft you tested with and scroll down the page and click on the **Campaigns** tab.

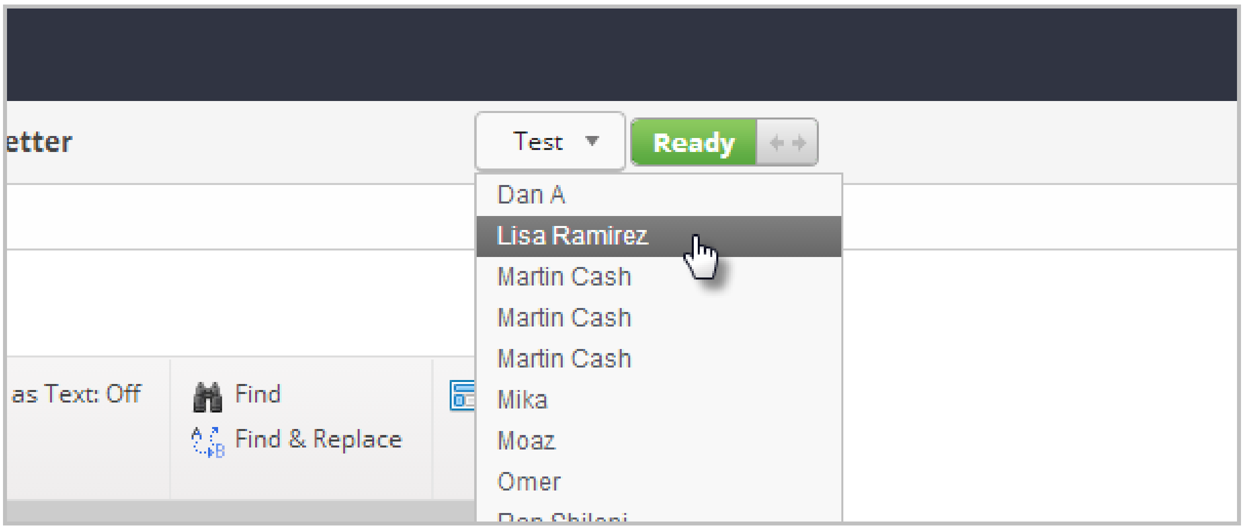


5. From here, you can see what campaigns this contact belongs to as well as all of the individual marketing pieces of the campaign.



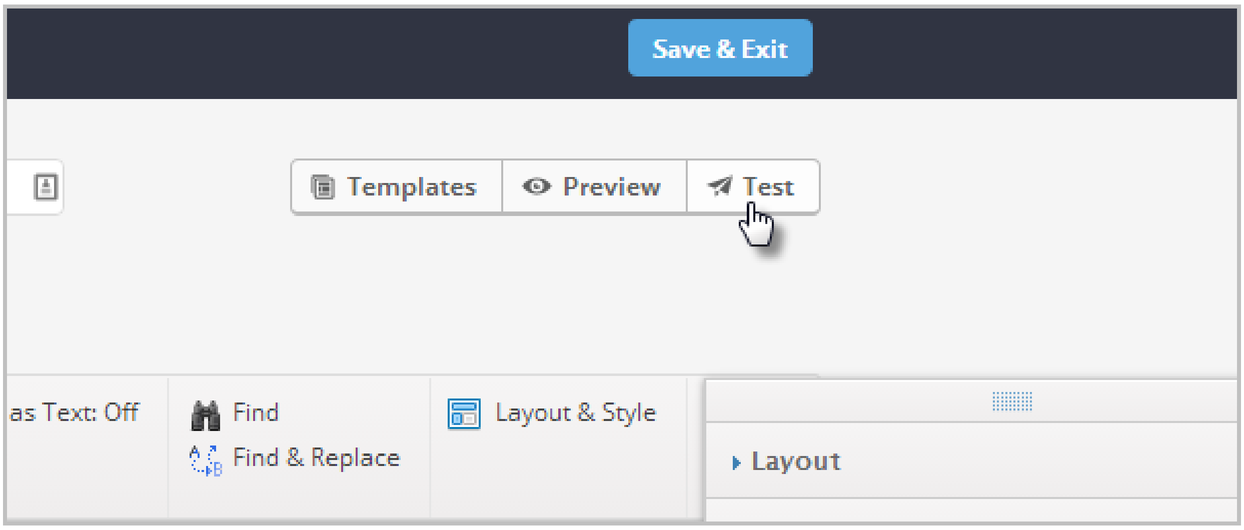
Test an Email in a Campaign Sequence

While viewing the email in the campaign sequence, click the Send Test button and select a user from the drop-down.



Test a Broadcast Email

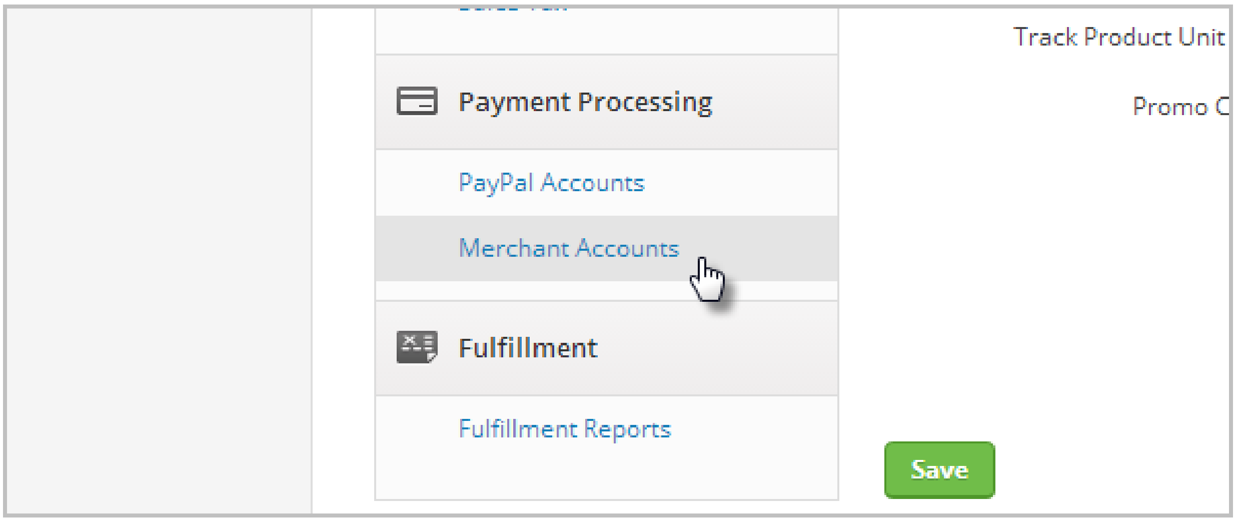
When sending a broadcast email, you can test the email on-the-fly while you are building it. Just click the Send Test button at the bottom of the page.



Test a Merchant Account

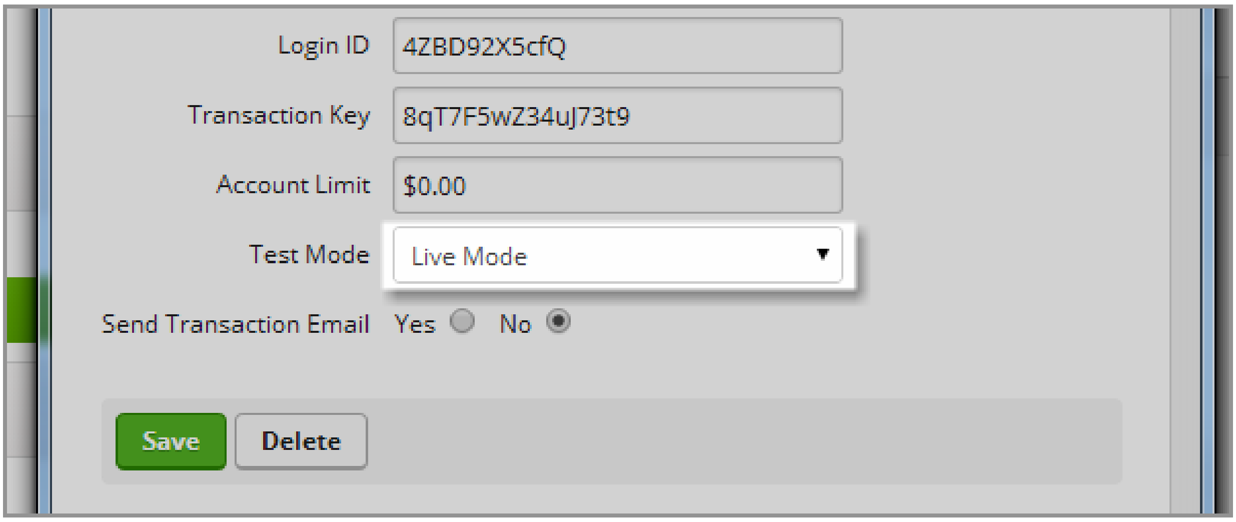
1. Go to E-Commerce > Settings in the main navigation menu.

2. Click on the Merchant Accounts link.



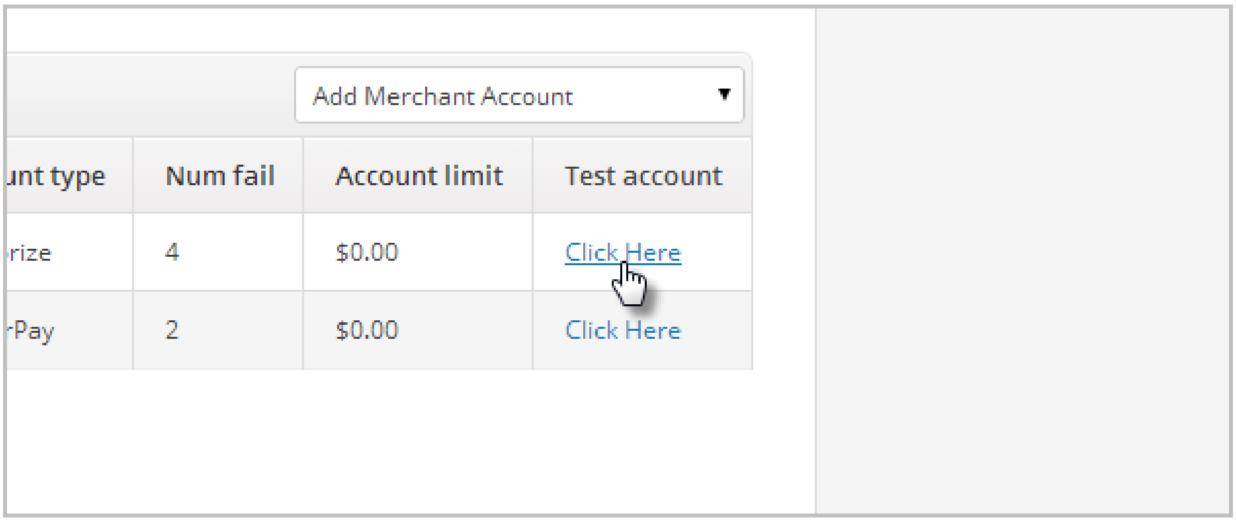
3. Click the Edit link next to the merchant account you wish to test

4. Make sure the merchant account is in Live Mode.



5. Click Save to save your changes (if necessary.)

6. Click the Click Here link next to your merchant account.



7. Enter your credit card information and click the Submit button. This will send a test charge of $.01 through your merchant account. If successful, you will get an "approved" message from the gateway. If it doesn't work correctly, you will get an error message with an error code. The image below shows an example of an error message from an Authorize.Net account that was set up incorrectly. Error code (13) means the API Login ID or password has been entered incorrectly, or the account is not active.

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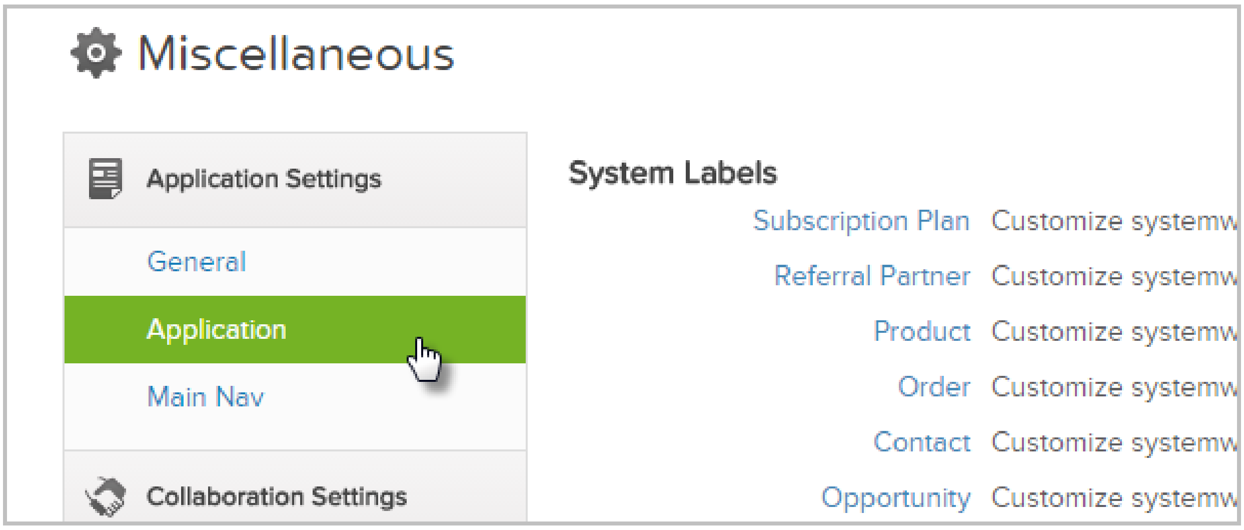
Get Your API Key

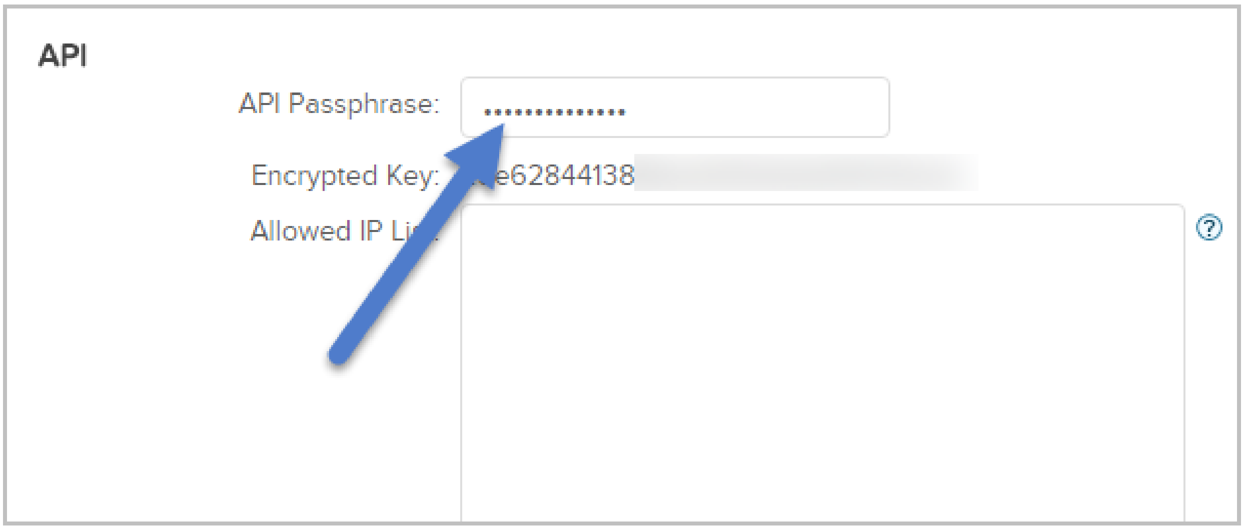
Last Modified on 07/23/2018 11:08 am MST

Legacy Alert! This feature should only be used if a 3rd party developer asked for the encryption key. The encryption key is only needed for the Legacy authentication method. If you are unsure if you should use this or not please talk with the 3rd party developer to find out. If you are attempting to set up a new integration please visit https://developer.infusionsoft.com/get-started/

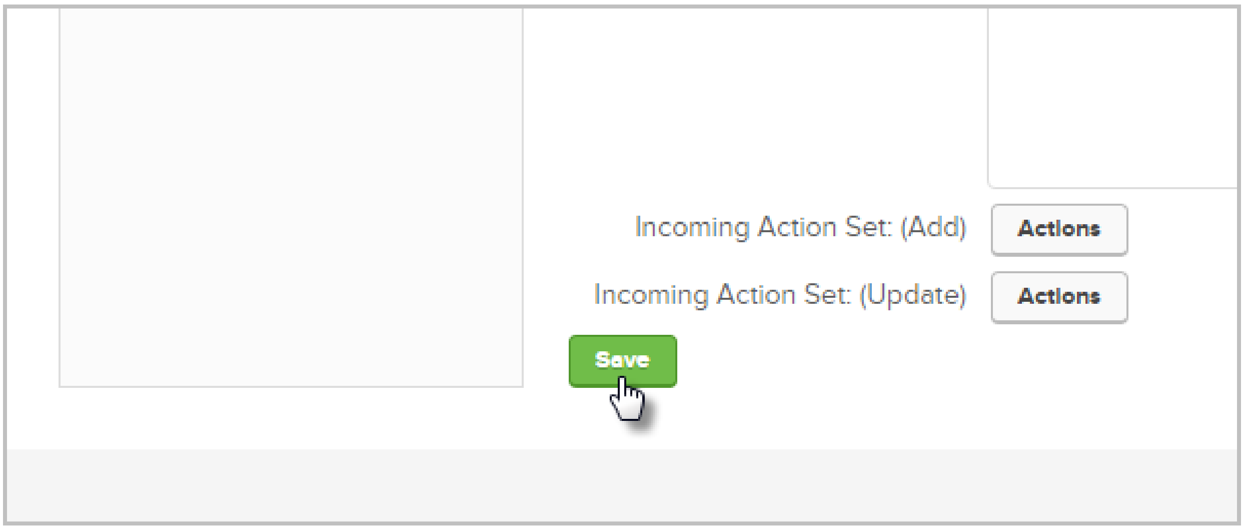
1. To enable the API key, go to **Admin > Settings** and click on **Application** in the settings menu



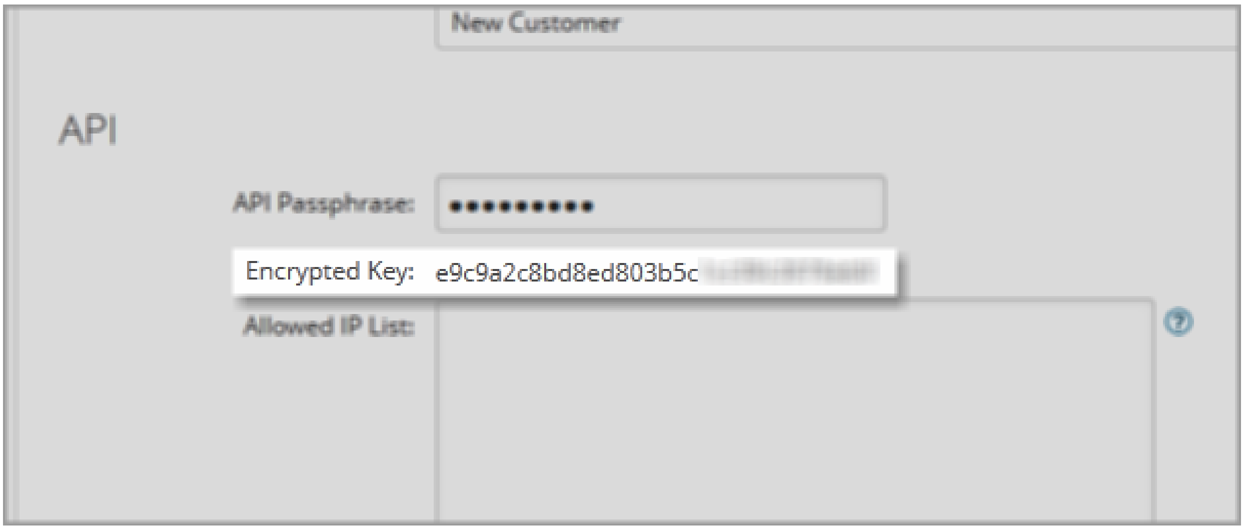
2. Scroll down to the API section and enter a passphrase in the text box. The API Passphrase is simply a password, or series of words that will be used to generate your unique API key. Be sure to remember your passphrase if you ever need to generate your API key again.



3. After you enter a Passphrase, click on the **Save** button to generate the API key



4. Your API Key is now available under the text box where you entered the pass phrase



5. Copy and paste your API Key into the required field in your 3rd party application

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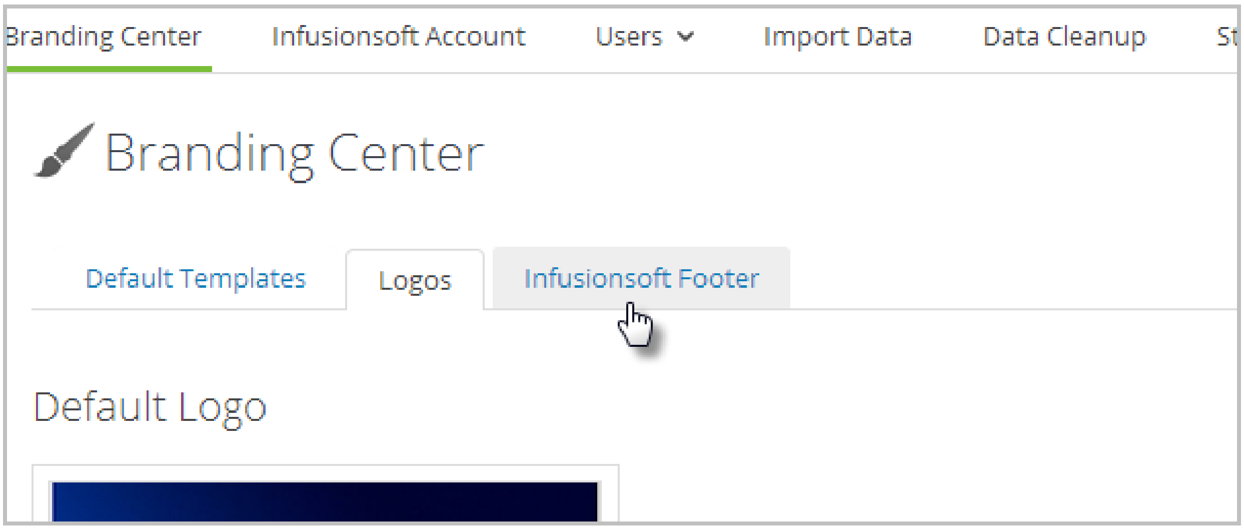
Remove The Infusionsoft Logo At The Bottom Of Your Emails

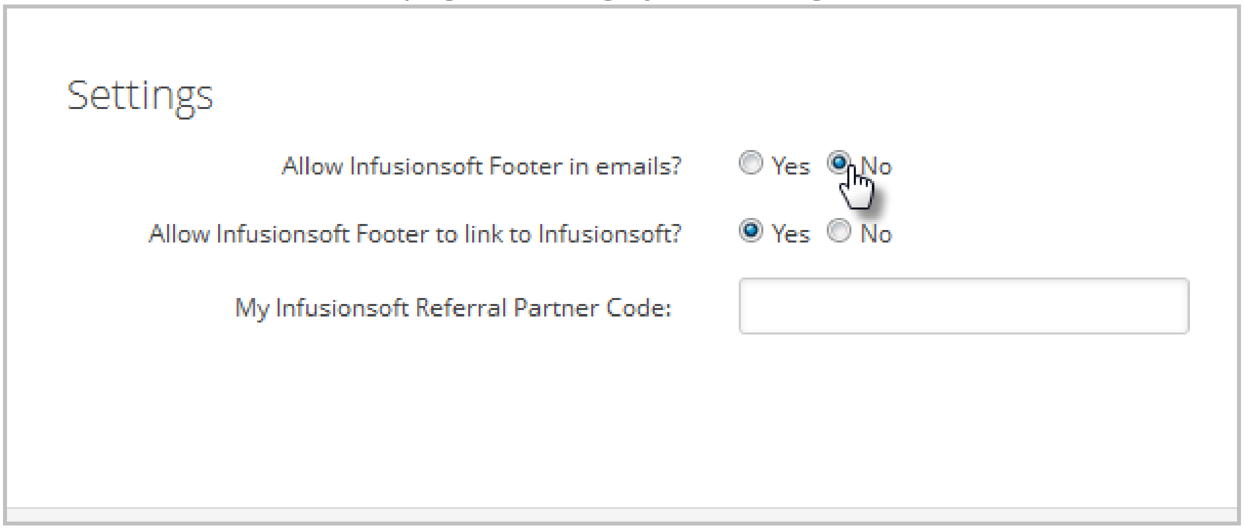
Last Modified on 08/13/2018 4:00 pm MST

1. Go to **Admin** > **Branding Center**

2. Click the **Infusionsoft Footer** tab.



3. Scroll to the bottom of the page to change your settings.



   - *Allow Infusionsoft Footer in emails*: Choose No to hide the Infusionsoft logo.
   - *Allow Infusionsoft Footer to link to Infusionsoft*: Choose No to show the logo, but disable the link to the Infusionsoft website.
   - *My Infusionsoft Referral Partner Code*: If you are an Infusionsoft referral partner, you can enter your partner code here to receive credit for leads generated through the Infusionsoft footer link.

4. (Optional) If you choose not to hide the Infusionsoft footer, select a logo or text option for emails and system pages.

5. Click **Save**

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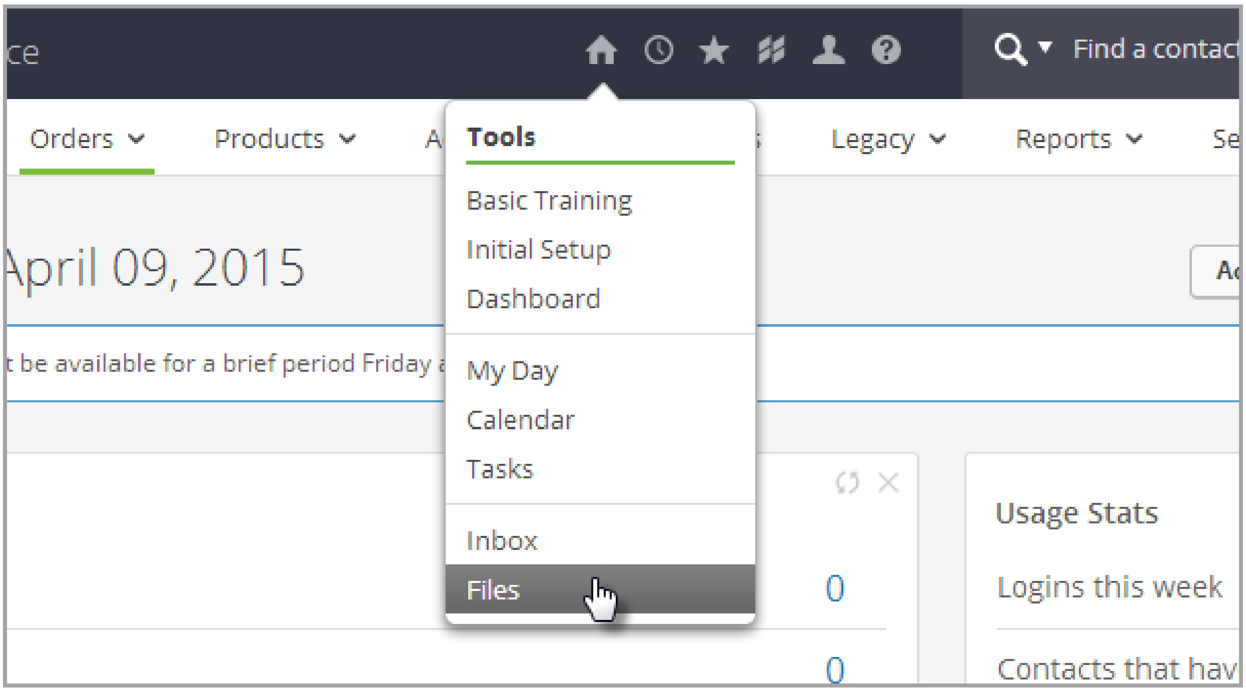
Store Files In Infusionsoft

Last Modified on 08/13/2018 4:00 pm MST

Infusionsoft includes digital document storage that enables you to centralize files and make them more accessible to users. Typically, users store images and pdfs that they can reuse in various marketing pieces. **You can store any file that is under 10 MB in size.** You are able to store user files, company files, company images, digital products and contact record files. You can also rename or delete files from here. If you need to update an existing file, make sure the revised file has exactly same file name and file type (.doc, .xls, etc.) as the older version. When you upload the file, Infusionsoft will ask you if you want to create a new file or replace an existing one.

Hover over the Home icon and click on **Files**



- My Files are protected; they are only accessible to the user who uploaded the file. User files can also be attached to an outgoing email or email template, but only by the user who uploaded them to Infusionsoft. These files are also not accessible to your contacts, unless you send them as an email attachment.

- Company Files are accessible to all of your Infusionsoft users. You may want to store document templates, internal procedure manuals, price lists, etc. the company file box. The company files can be attached to email communications sent out through Infusionsoft. These files are not accessible to your contacts, unless you send them as an email attachment.

- Company Images are accessible to all of your Infusionsoft users. This list includes images you've uploaded to Infusionsoft to use in emails, thank-you pages, shopping cart or order form styles, etc. You can display them to contacts when they are used in one of these external facing mediums or if you send them as an email attachment.
- Digital Products are accessible based on the restrictions you defined when you set them up. Digital Products are most often created and managed through E-Commerce > Products, but you can also view and manage them here if your user permissions allow.
- Contact Record Files are uploaded and managed through individual contacts. The File Box is located in the bottom row of tabs.

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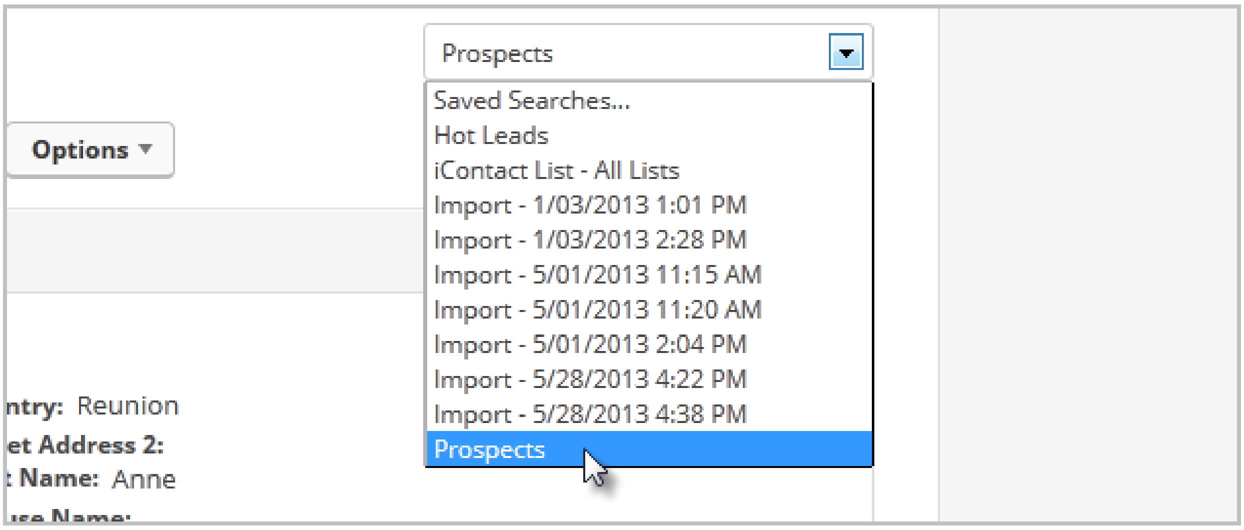
Automatically Email Reports

Last Modified on 08/13/2018 4:00 pm MST

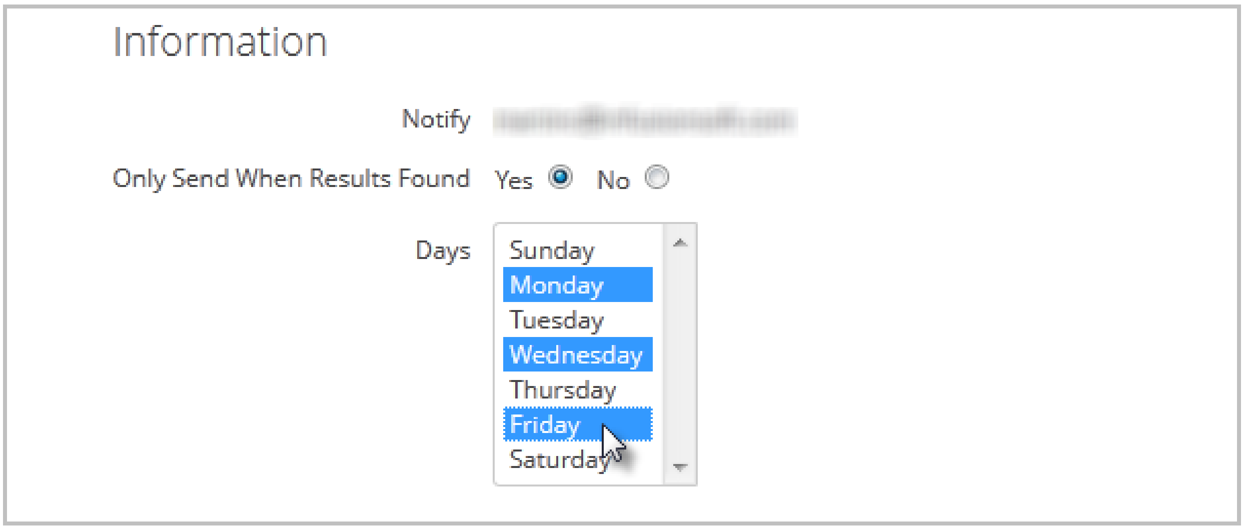
Once you create a saved search or report, Infusionsoft can automatically email you an updated list on a recurring basis.

1. Pull up a Saved Search or Report

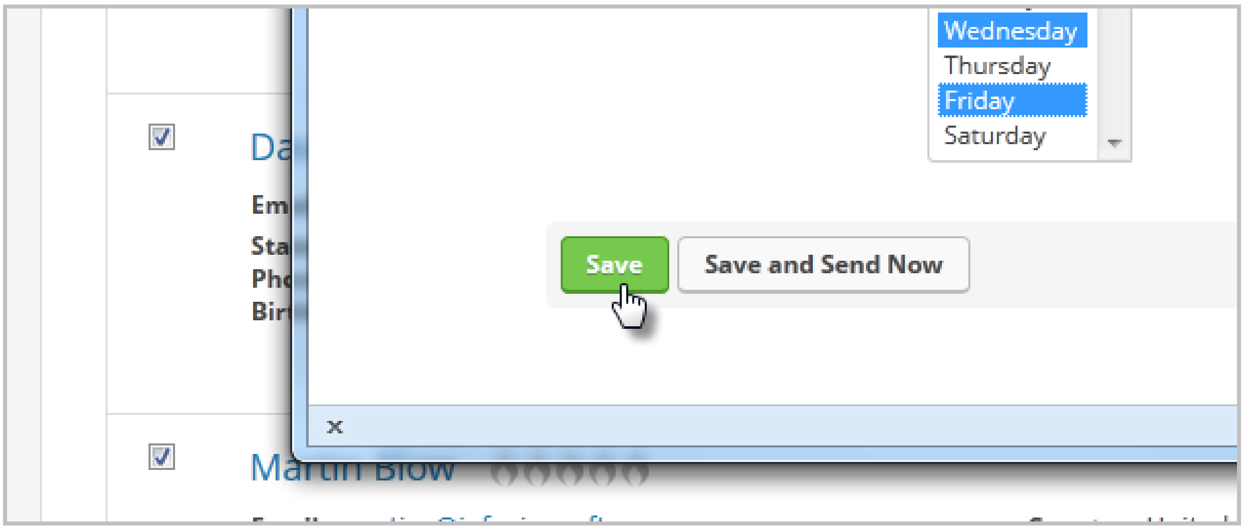


2. Click on **Options**, and select **Email Saved Search**

3. Select the frequency for the email report. Hold down the **CTRL** key (or the **Command** key on a Mac) on your keyboard to select more than one day.



4. Click on the **Save** button, or **Save and Send Now** (to get a copy of the report right away.)



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Customize The Default Drop Down Menus

Last Modified on 06/18/2018 9:24 am MST

You can customize drop-down field options in contact, task, opportunity, and order records. You can easily add or remove options that do not apply to your company. Customizing the drop-down fields can speed up data entry, improve accuracy, and minimize confusion.

Contact Fields

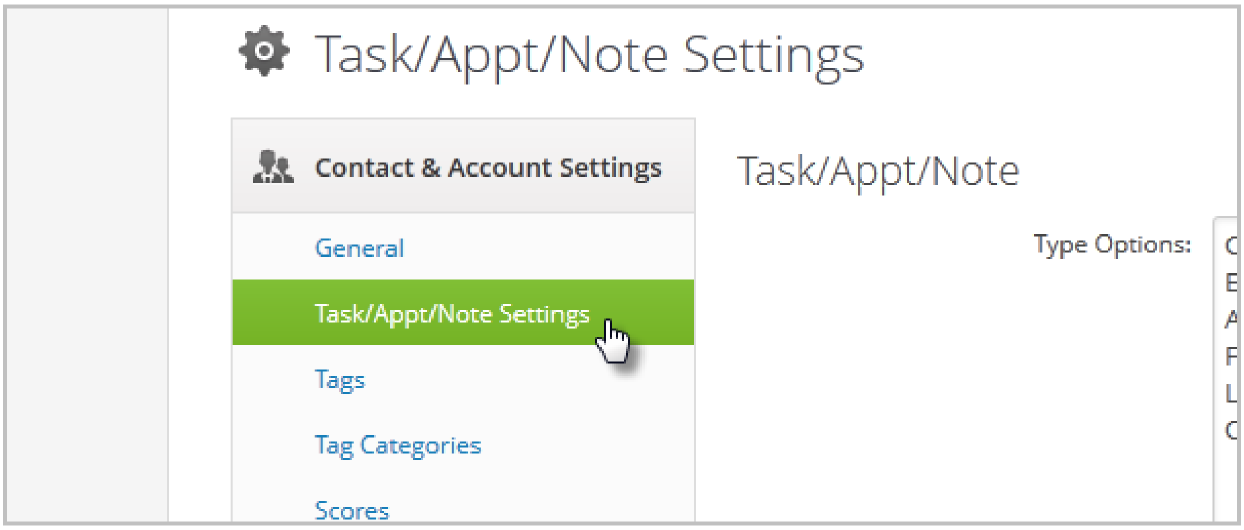
1. Go to **CRM** > **Settings** in the main navigation menu.

2. Add more list options (one to each line) or edit the existing ones (i.e. contact type, title, phone type, etc.) then click on the **Save** button at the bottom of the page.

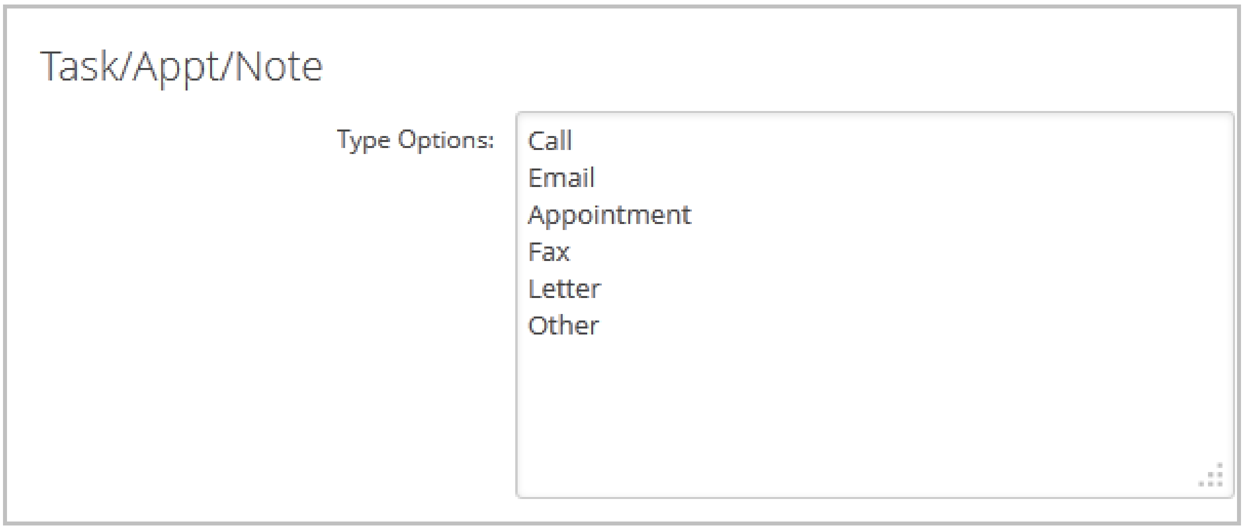
Task, Appointment, & Note Fields

1. Go to **CRM** > **Settings** in the main navigation menu.

2. Click on **Task/Appt/Note** in the settings menu.



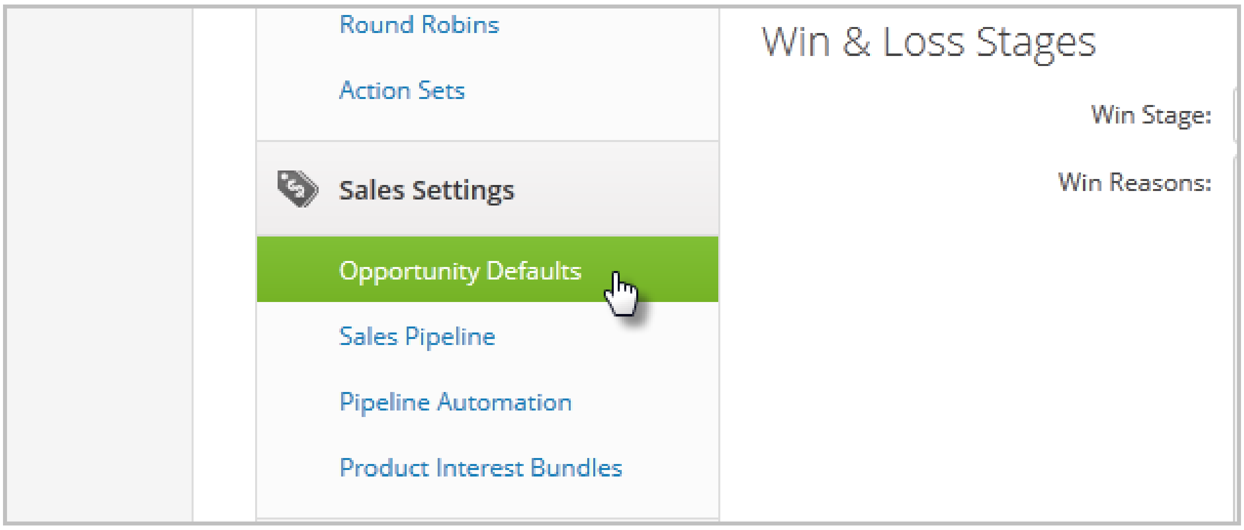
3. Add more list options or edit the existing ones and click on the**Save** button.



Opportunity Fields

1. Go to **CRM** > **Settings** in the main navigation menu.

2. Click on **Opportunity Defaults** in the settings menu.



3. Add win and loss reasons to the list and click on the **Save** button.

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Change Field Labels

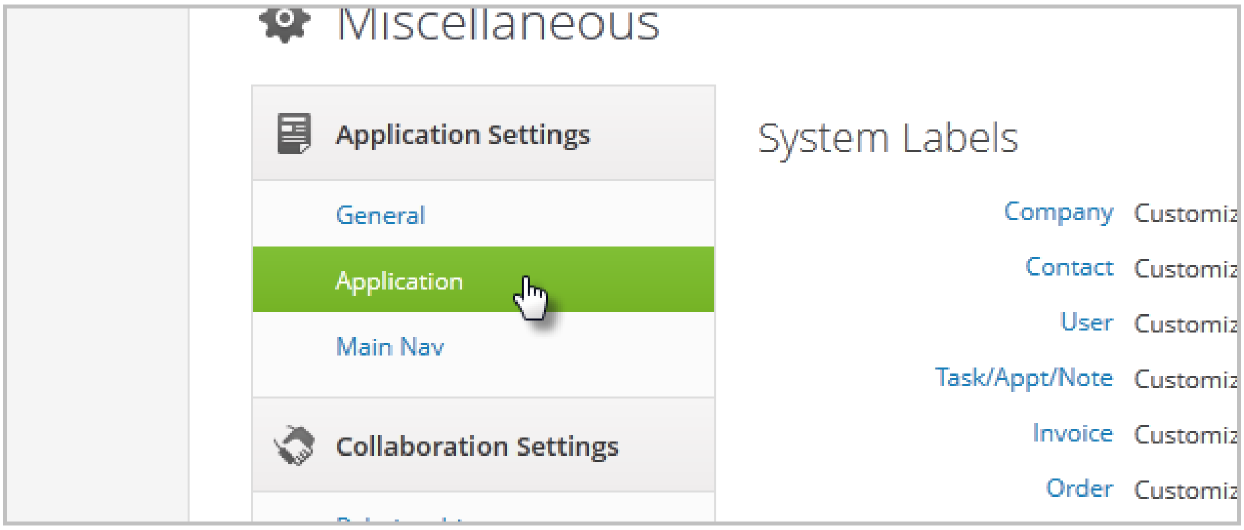
Last Modified on 07/23/2018 11:09 am MST

You can customize the standard labels displayed within your Infusionsoft application. This allows you to re-purpose a standard field or use names that are more familiar to you and your Infusionsoft users. When you change the label for a record or field in Infusionsoft, it is only a cosmetic change. It does not change the back-end database name that you would use to integrate other systems with Infusionsoft through the API .

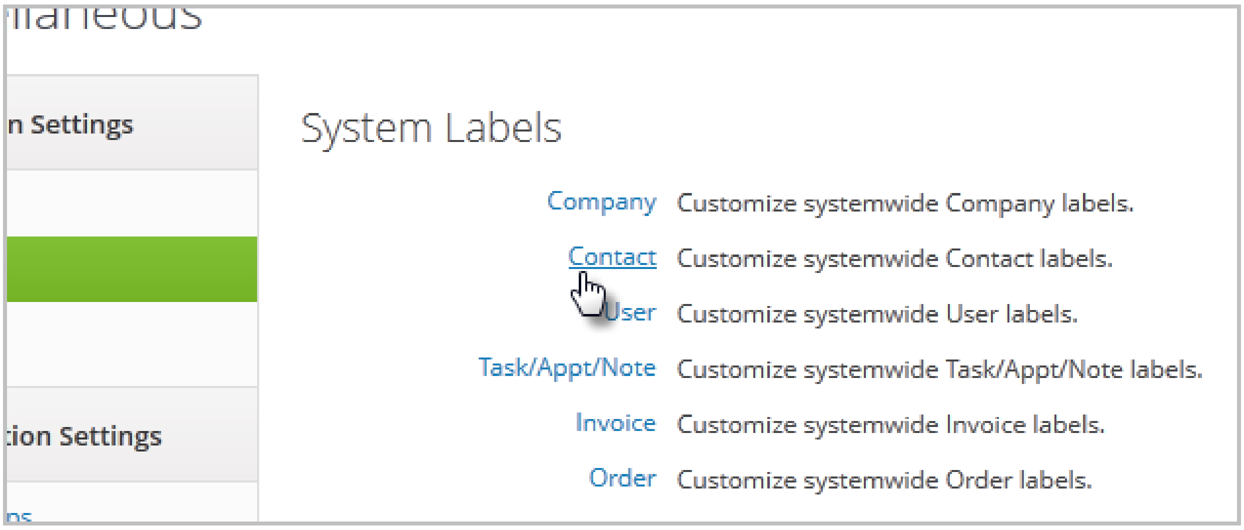
Record labels are displayed in the area navigation and drop-downs (e.g., You could change the label "Companies" to "Accounts" or change "Opportunities" to "Deals".)

Field labels are displayed within individual records, like a contact or company record. You can customize field labels to align with address field names for your locale.

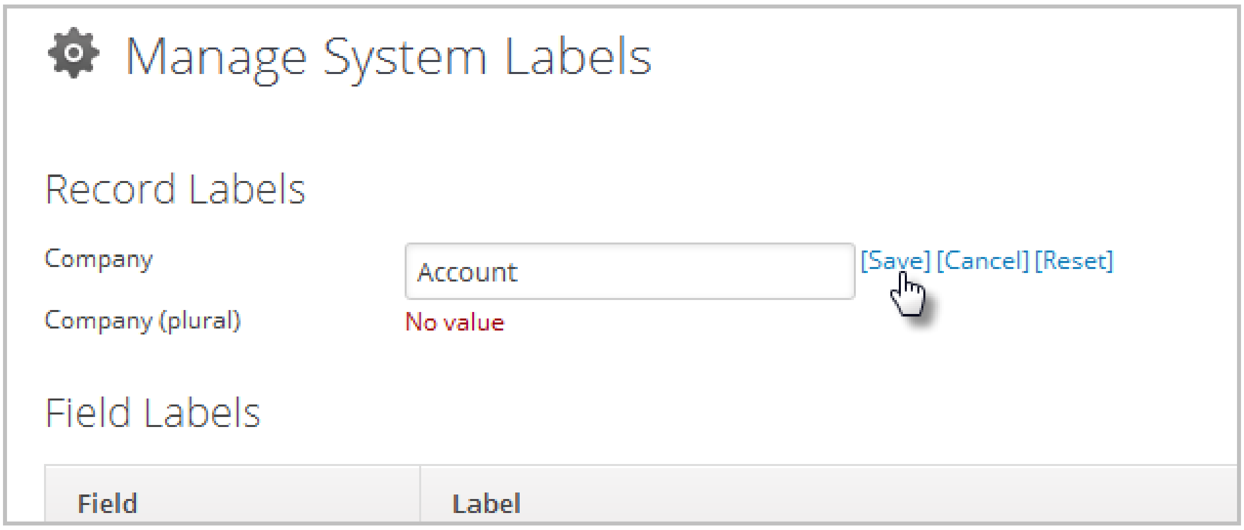
1. Go to **Admin** > **Settings** in the main navigation menu
2. Click on **Application** in the settings menu



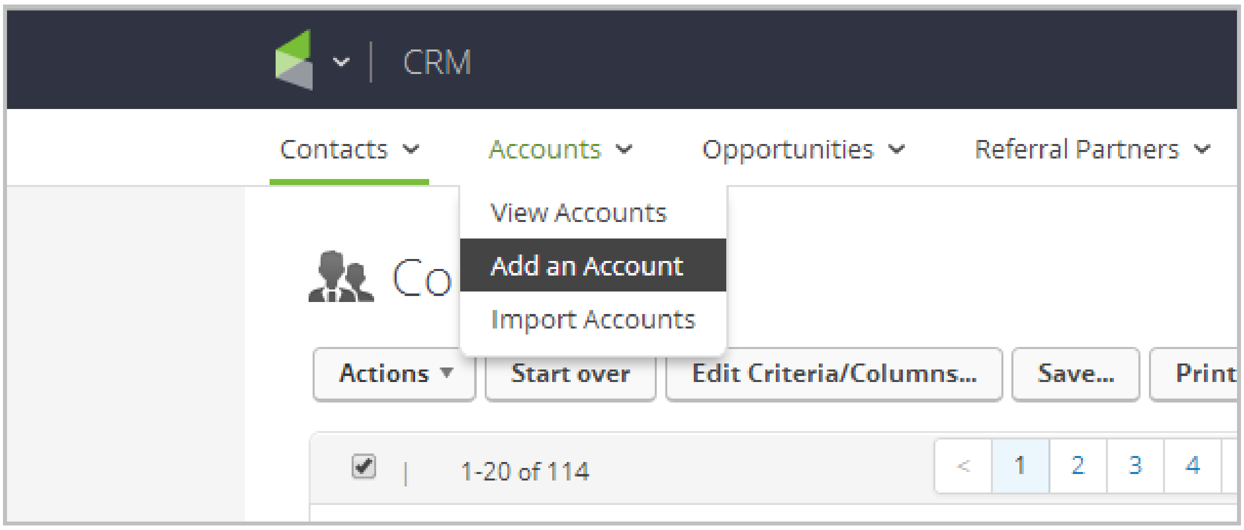
3. The first section on this screen displays a list of system labels. Click on the link for the type of label you want to change (Order, Company, Contact, etc.) The standard field labels are on the left.



4. Click on the link (e.g. "No Value") next to the record or field label you want to change, and then enter and save the new label name. In the example below, we rename "Company" to "Account."



5. it now looks like this...



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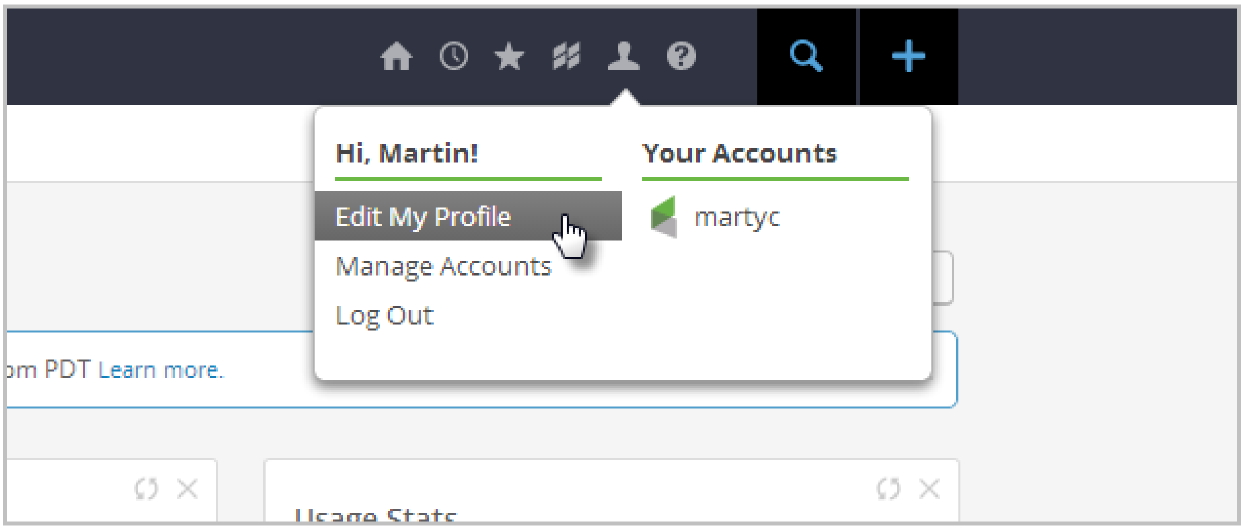
Add a POP Email Account

Last Modified on 08/23/2018 2:20 pm MST

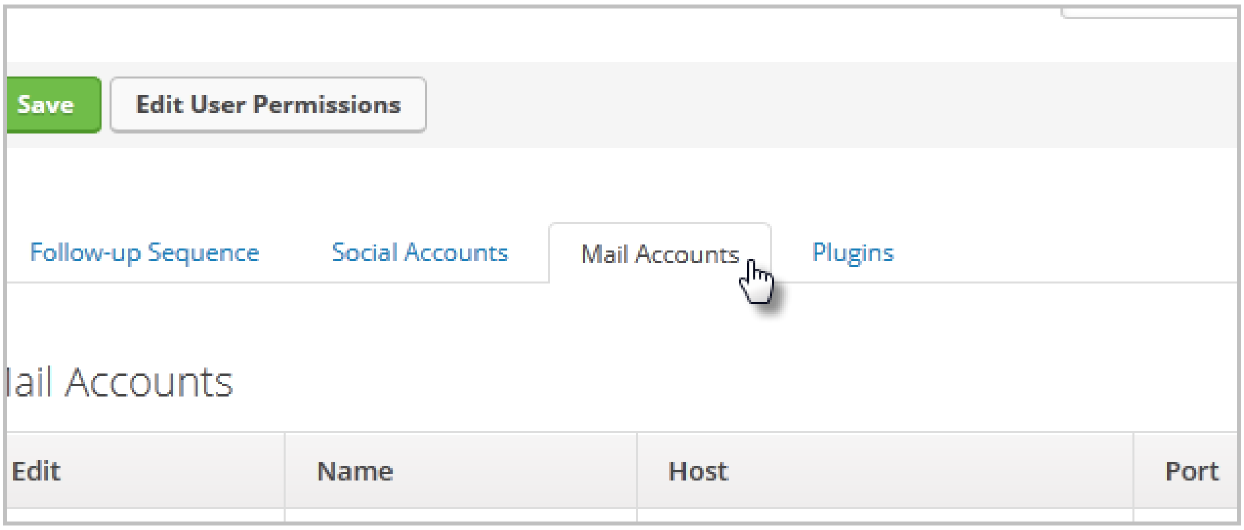
You can connect an existing email accounts to Infusionsoft so you can send and receive their email through Infusionsoft. Email accounts are linked to individual users. You can add multiple mail accounts for each Infusionsoft user. Repeat the process below to add additional email accounts.

Note! The Infusionsoft email client is very basic. We recommend to use either the Infusionsoft Outlook or Gmail sync products. If you are a Mac user we recommend Tealeaves . If you are having issues using Pop Mail you can reach out to your service provider to review their configuration. For example click here is Gmail.

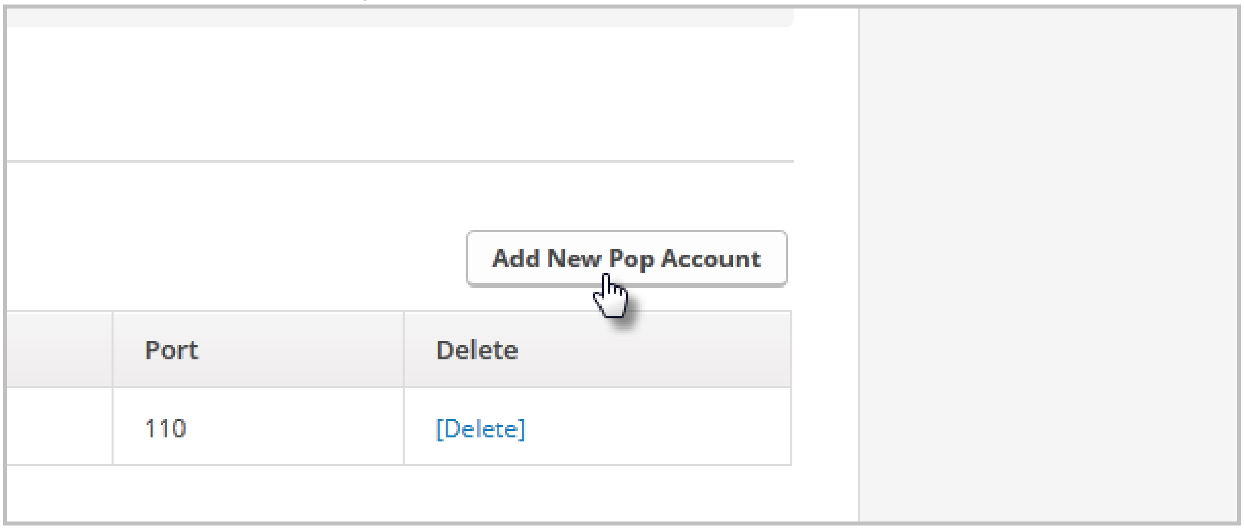
1. Click on **Edit My Profile** in the user toolbar (or go to **Admin > Users** and click on a user's name to link an email account for another user.)



2. Scroll to the bottom row of tabs in the user record and click on the **Mail Accounts** tab.



3. Click on the **Add New Pop Account** button

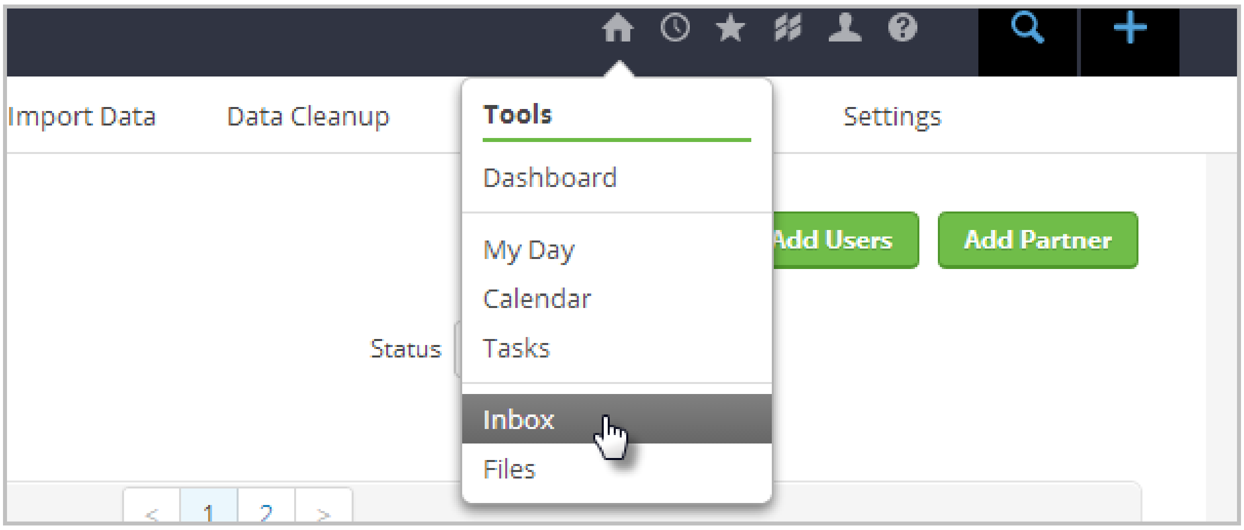


- **Name:** Enter the account name; users will see this name when they download email messages (e.g., Bob Smith's Gmail Account.)
- **Users:** Select the users who will need to download messages from this account through Infusionsoft. Hold down the CTRL key on your keyboard to select more

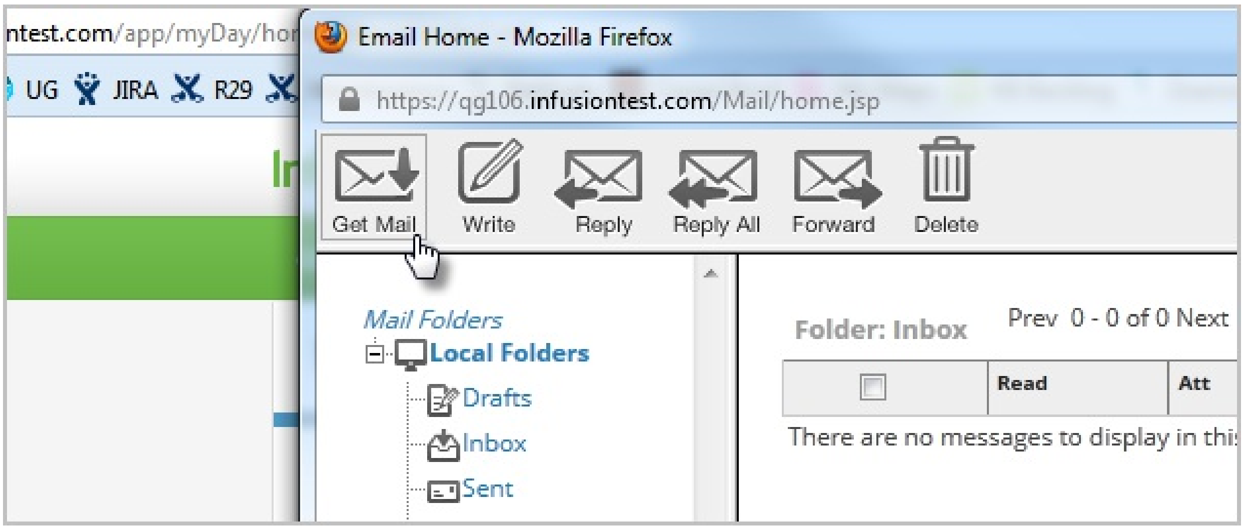
than one.

- **Username:** Enter the username for your email account. This is usually an email address.
- **Host:** Enter the host name for your POP mail server. You can get this from your email service provider (i.e. GoDaddy, Gmail, etc...) or by searching Google. The format usually looks something like this: pop.domain.com or pop3.domain.com (i.e., pop.secureserver.net.)
- **Port:** You only need to change this if the default setting (110) does not work. Check with your email service provider or search Google for the correct port for your email service provider.
- **Use SSL:** Select Yes if you are setting up a Gmail or Microsoft Exchange email account.
- **How Long to Leave Messages on Server:** The Infusionsoft email client downloads copies of the email messages stored on your email server. When you view the messages through Infusionsoft, you are viewing the copies, but the original messages still take up space on your email server. If your email server has storage space limitations, you will encounter problems receiving email when that space gets full. Deleting a message from the Infusionsoft email client does not remove the message from the server automatically.
- **No Delete:** This is the default setting. Choose No Delete if you never want Infusionsoft to remove the original messages from your email server. If you choose this option, make sure you are removing the original messages through another email client or by logging directly into your email server.
- **Delete in X Days:** If Infusionsoft is your primary or only method of checking email, you need to select a specific number of days to keep the original emails on the server after you've downloaded a copy into Infusionsoft. Once the original message is deleted from the server, it is no longer accessible through any other email client. If your Users share this email account, make sure you leave messages on the server long enough for everyone to download them.

4. Click **Save**
5. To Test your POP email account, click on **Home** and select **Inbox**



6. Click on **Get Mail**



Pro Tip! If you receive an error message, review step 3 more closely. You may need to enabled SSL and change your port number to 995.

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Fixing Common Error Messages

Last Modified on 06/18/2018 9:24 am MST

There are several problems that you can remedy by simply clearing your browser cache & cookies. Here is a great website dedicated to helping you do this on the most popular web browsers.

- Drop-down fields are missing or not working on a page
- You get an “Access denied” message when trying to use the Contact search even though you are an Admin user
- You receive the error message, "Results cannot be retrieved at this time” or something similar that states that the page is not loading correctly
- When you are trying to save a page or make changes to a campaign and they are not updating correctly
- Occasionally, clearing cache & cookies can resolve slowness issues

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Resolving 502 Bad Gateway and Other Error Messages

Last Modified on 06/18/2018 9:22 am MST

If you are experiencing 501 Bad Gateway errors in Infusionsoft, it is due to poor communication between our servers and your computer network. There are a few things you can try to resolve the issue:

1. Clear your browser cache completely. Many times, this is a local caching problem that you can quickly resolve. Check out this website that describes how to clear your browser's cache.

2. If you are surfing the Web and see this problem for all Web sites you try to visit, then either:
    1. There is something wrong with your internal Internet connection (e.g. your company firewall is not functioning correctly.) In this case, you should contact your company's IT department.
    2. Your ISP has a major equipment failure/overload - this is unusual. If this is the cause, then you will need to contact your ISP.

3. If you get this problem only when trying to access your Infusionsoft account and you have cleared your browser's cache, please contact our customer service department. If after hours, call the support line, +1 866 800 0004 Ext. 2 and wait for "emergency" notice to leave a message for on-call support.

Here are some other common errors that can usually be resolved by clearing your browser cache & cookies .

- Drop-down fields are missing or not working on a page
- You get an "Access denied" message when trying to use the Contact search even though you are an Admin user
- You receive the error message, "Results cannot be retrieved at this time" or something similar that states that the page is not loading correctly
- When you are trying to save a page or make changes to a campaign and they are not updating correctly
- Occasionally, clearing cache & cookies can resolve slowness issues

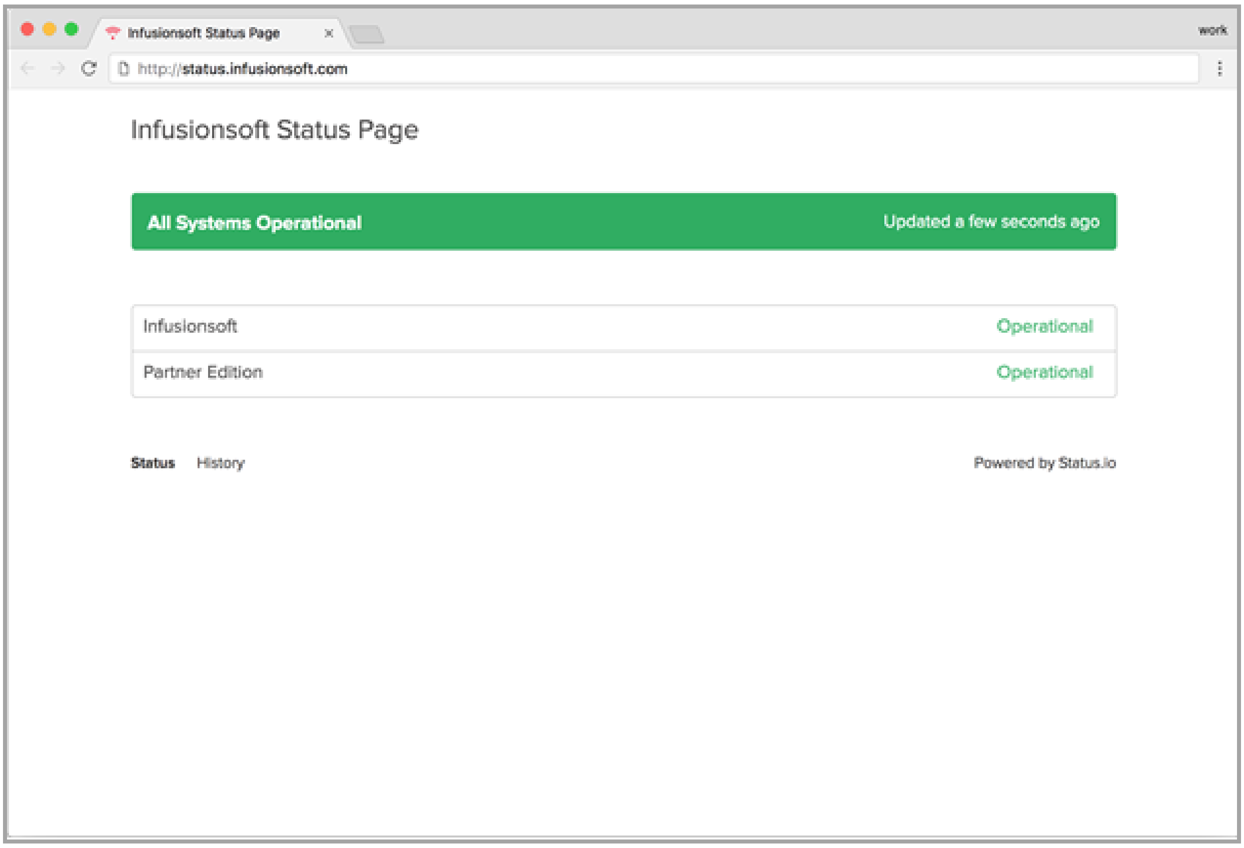
Using a different version of Infusionsoft? Click Here to learn more

Server Status Page

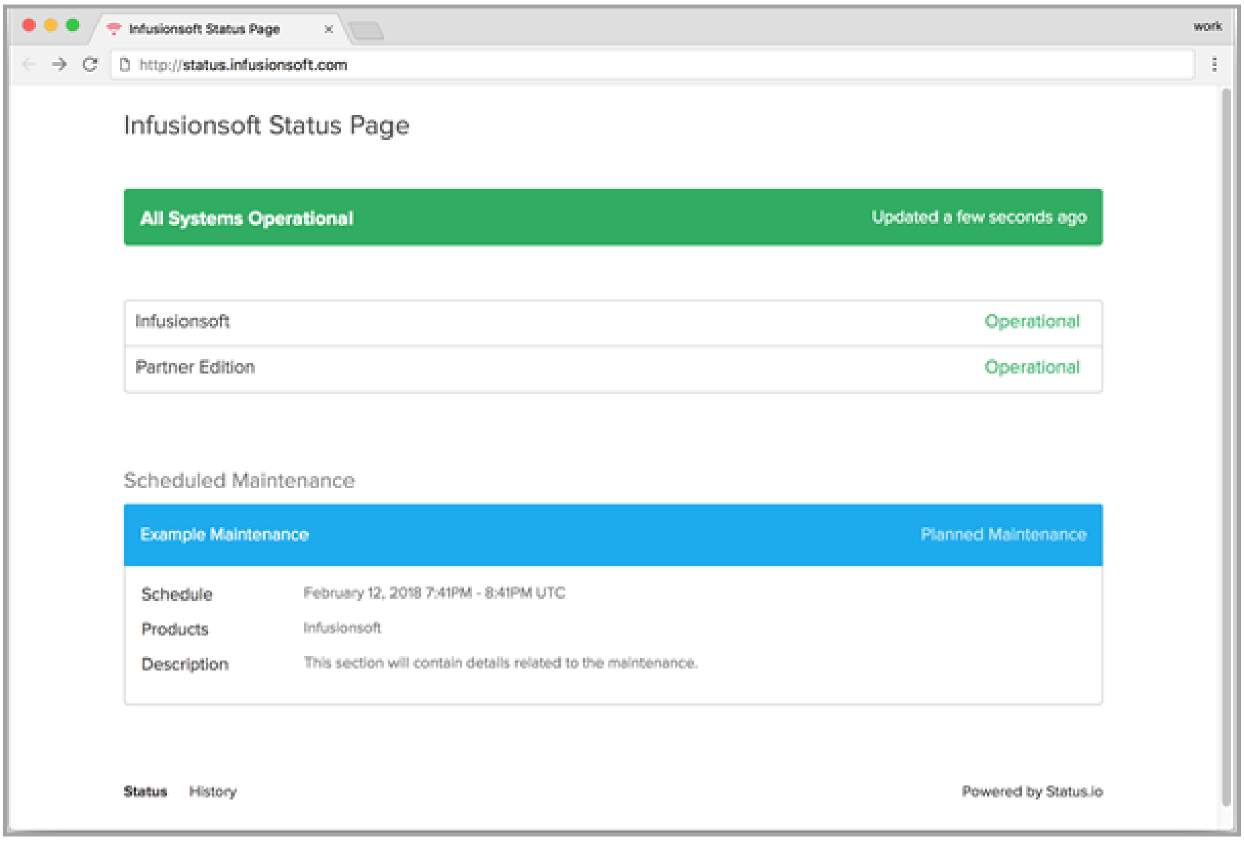
Last Modified on 06/18/2018 9:24 am MST

Go to status.infusionsoft.com to learn the current status of Infusionsoft and Partner edition servers. The status page will be kept up to date with any known incidents or scheduled maintenance windows that would disrupt the normal operation of our products. View historical incidents and maintenance by clicking the **History** link at the bottom of the page.

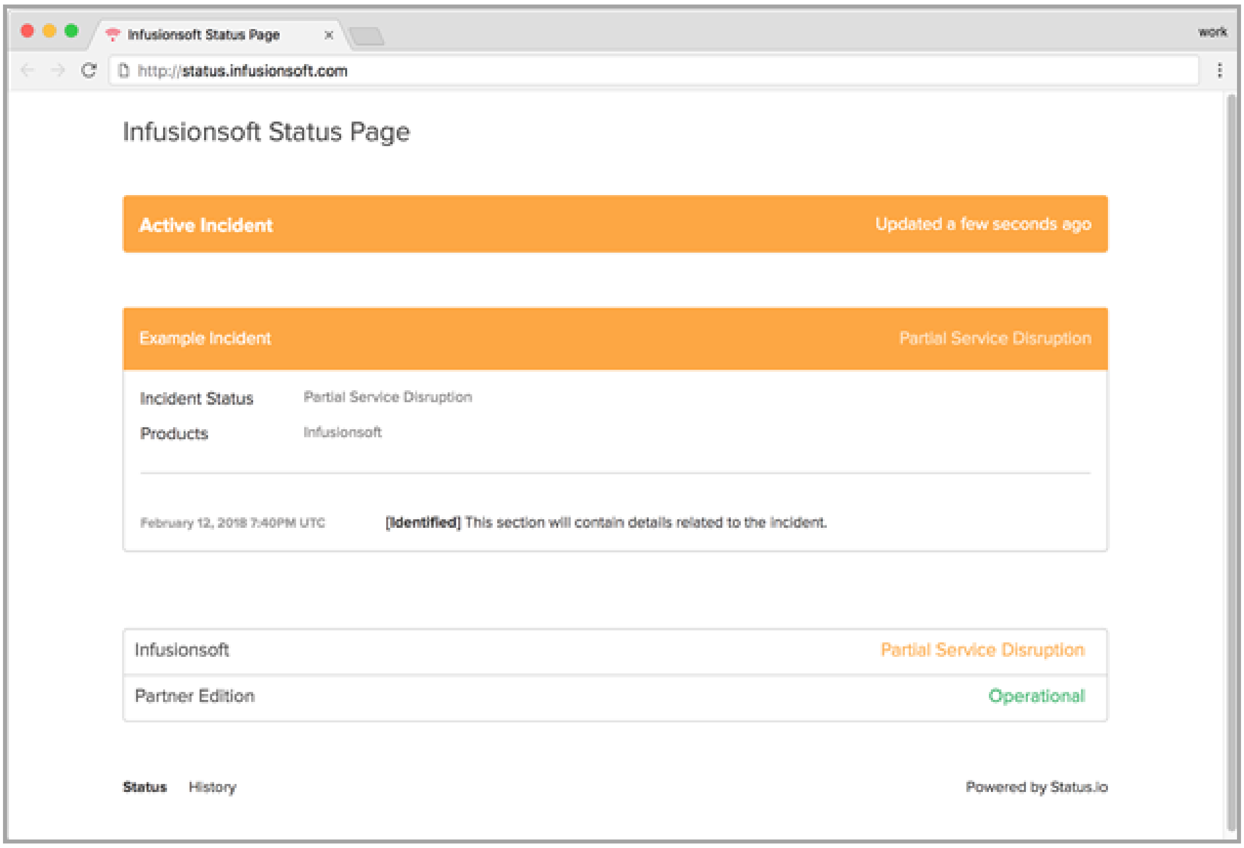
All Systems Operational



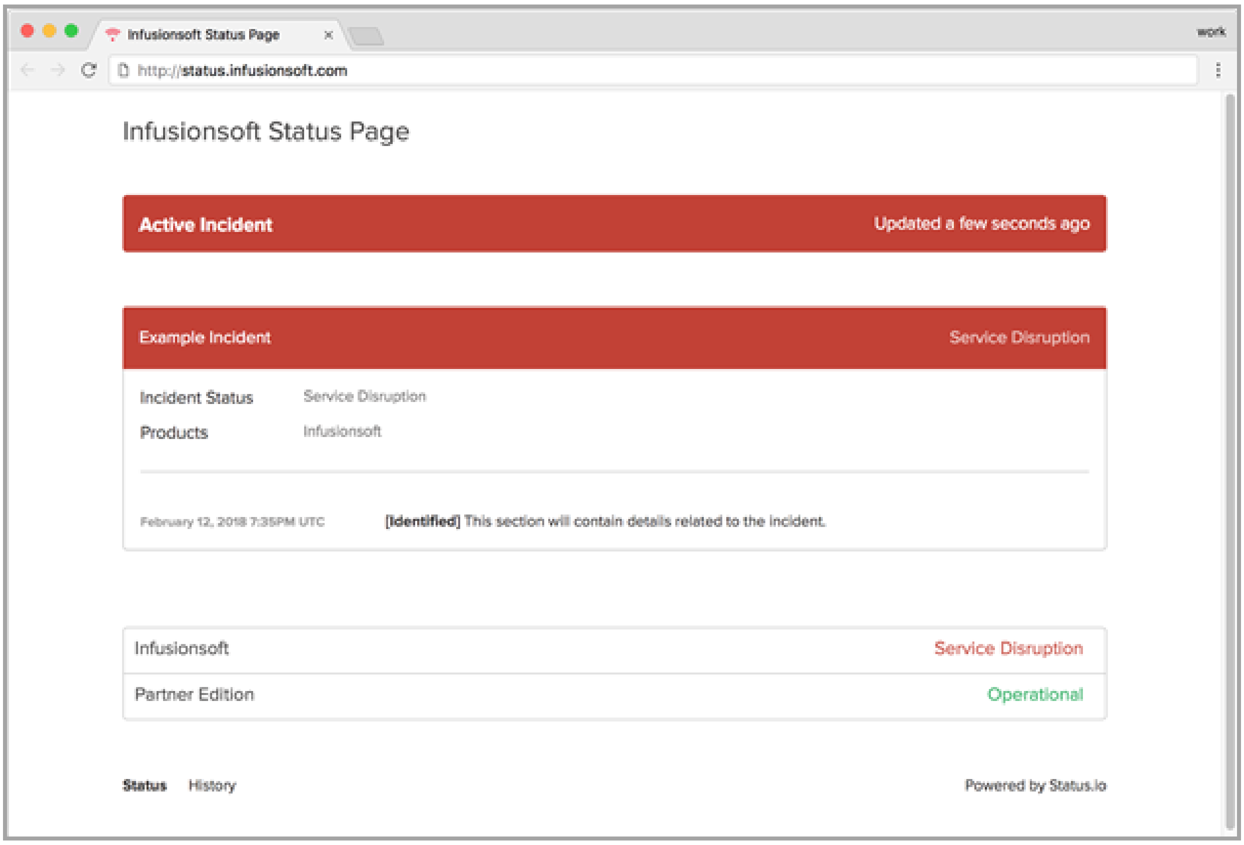
Planned System Maintenance



Partial Service Disruption



Service Disruption

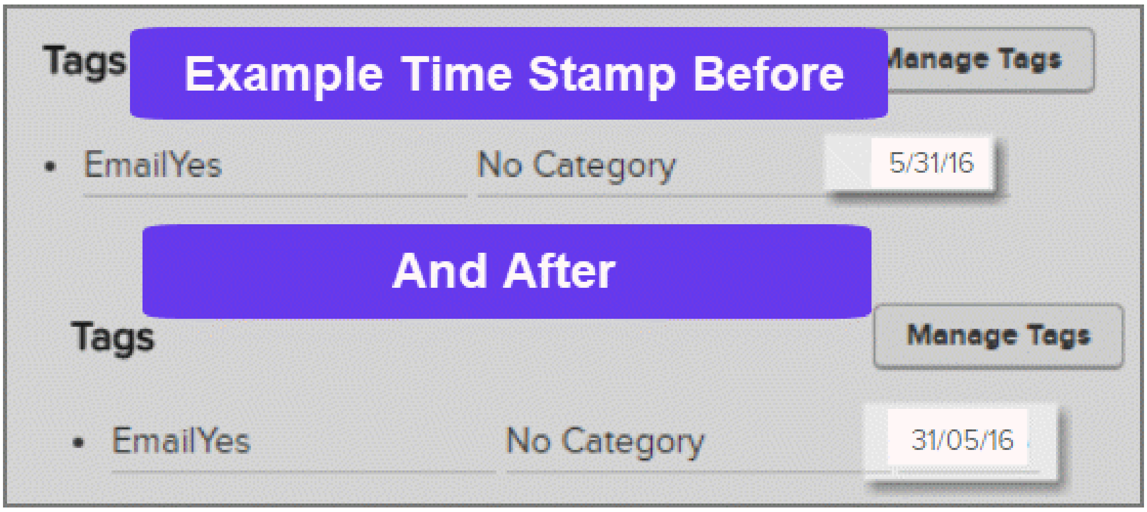


Using a different version of Infusionsoft? Click Here to learn more

Browser Time Zone Settings

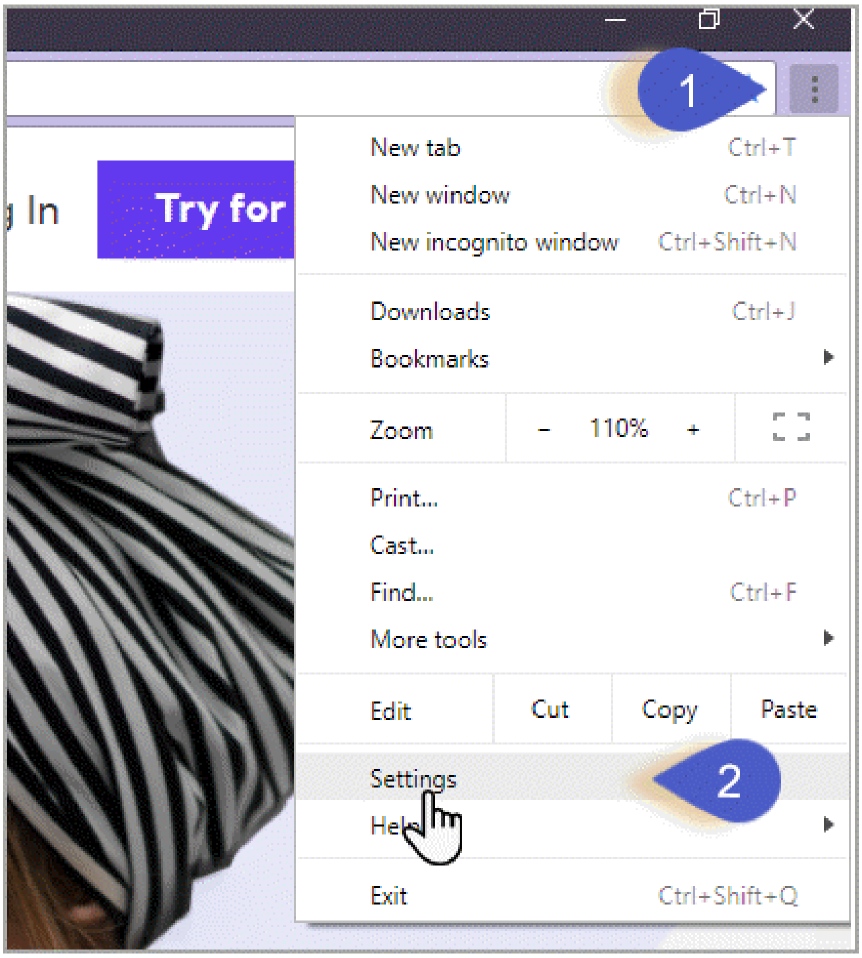
Last Modified on 08/13/2018 4:02 pm MST

The format of an application is currently based on an Infusionsoft setting or a browser setting. Here are the steps to make sure your browser settings are set to your correct Time Zone.

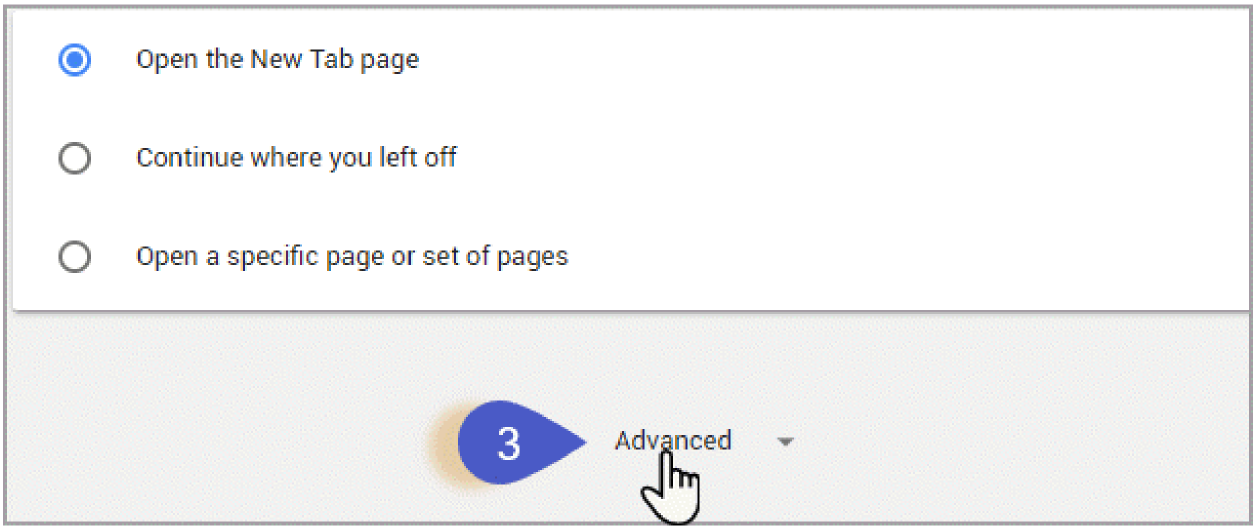


Set up the Chrome Time Zone Browser Setting

1. Click on the **Customize and Control Google Chrome** icon in the upper right corner and click **Settings**

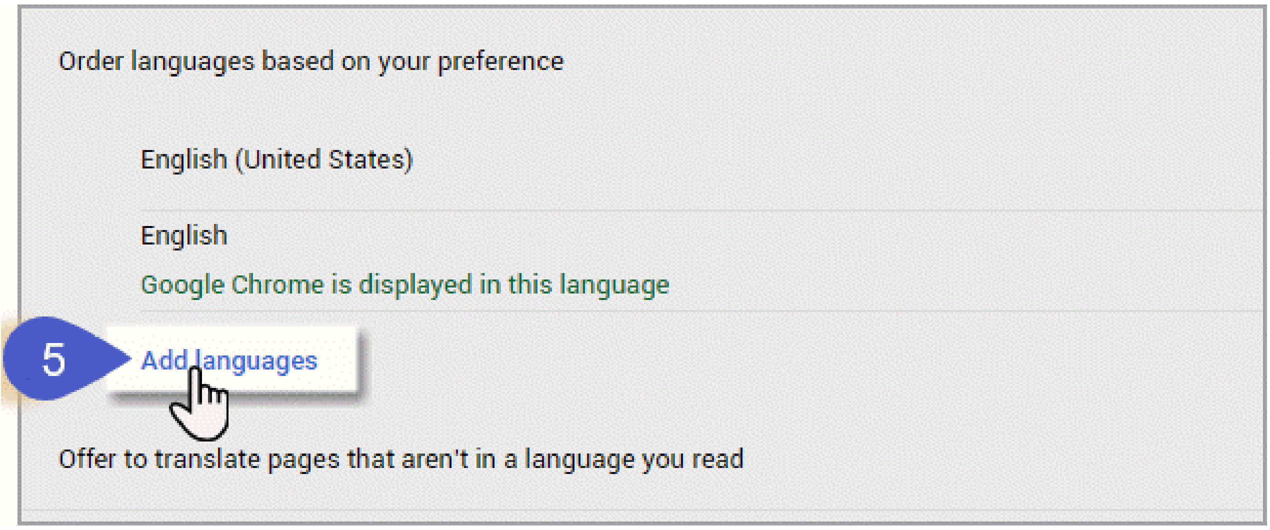


2. Scroll down to **Advance**

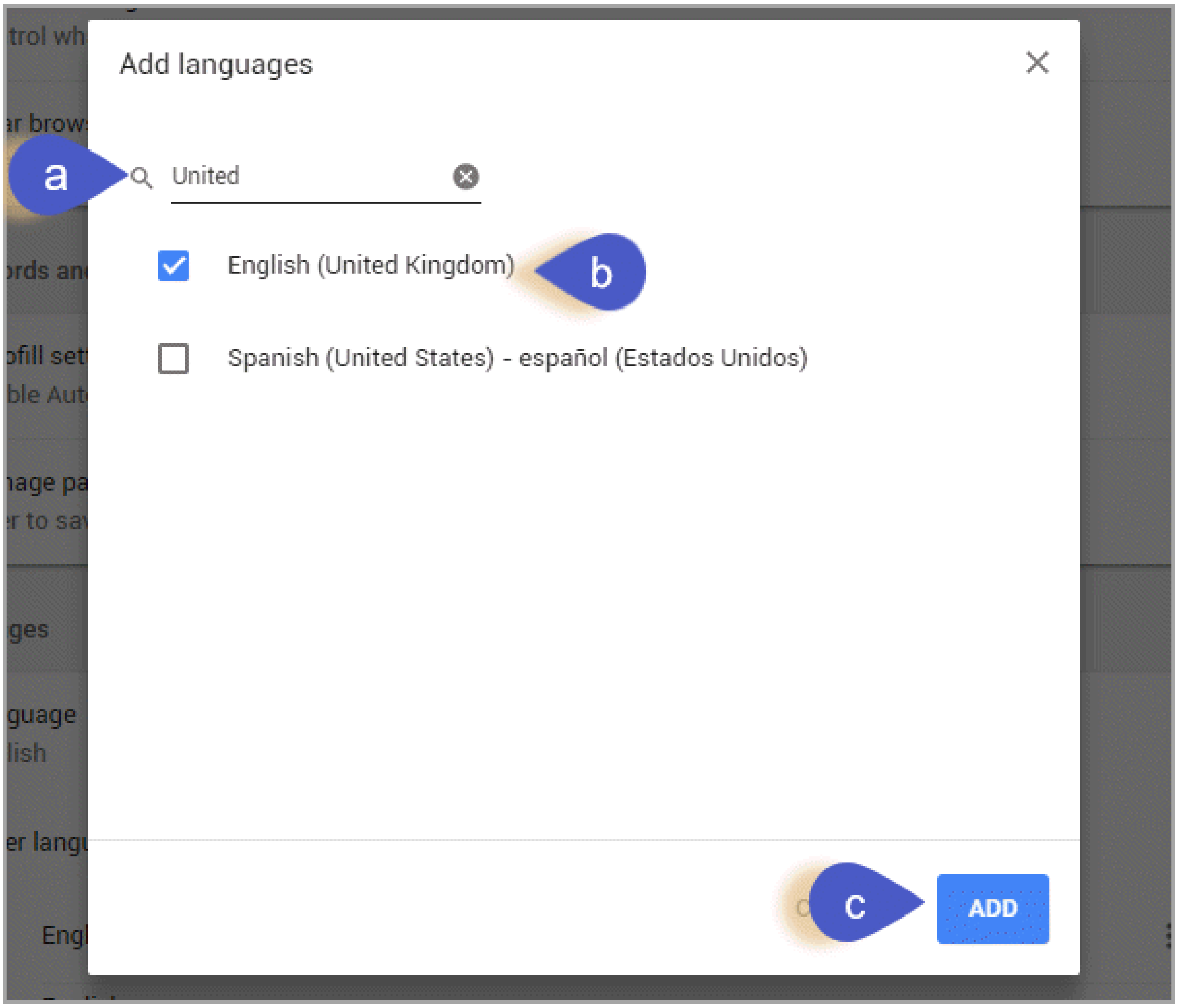


3. Scroll down to **Languages**

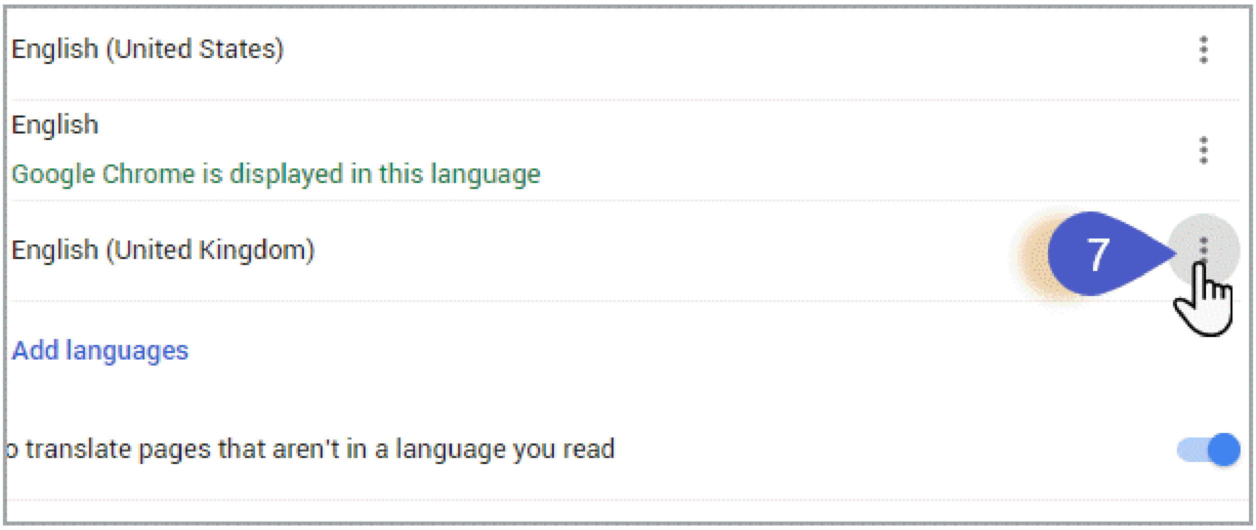
4. Click **Add Languages**



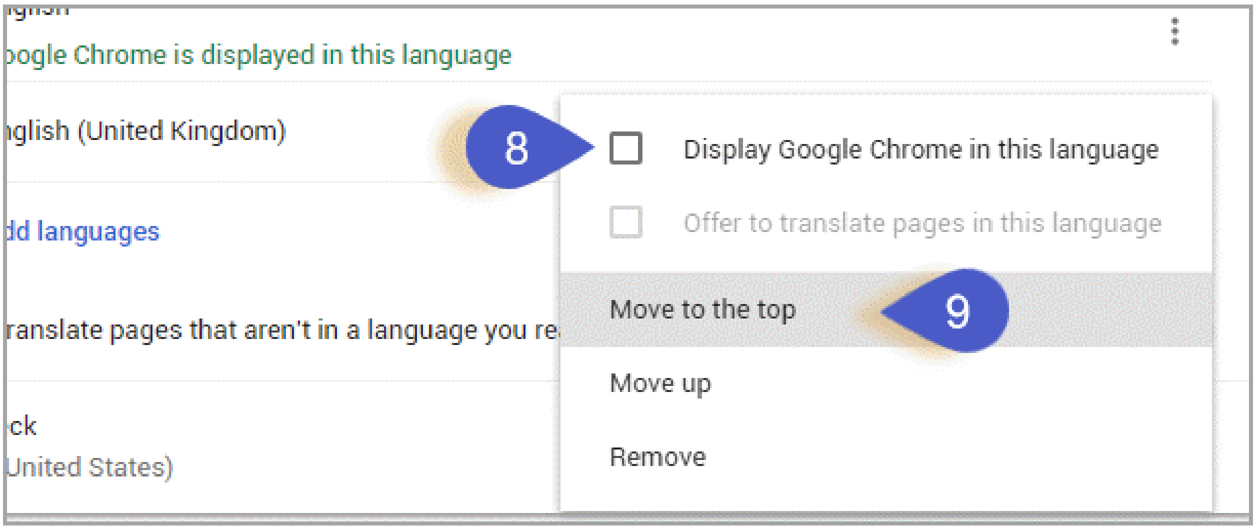
- Search for your language
- Check the box next to the correct language
- Click **Add**



5. Click the **3 dots** next to the newly added language

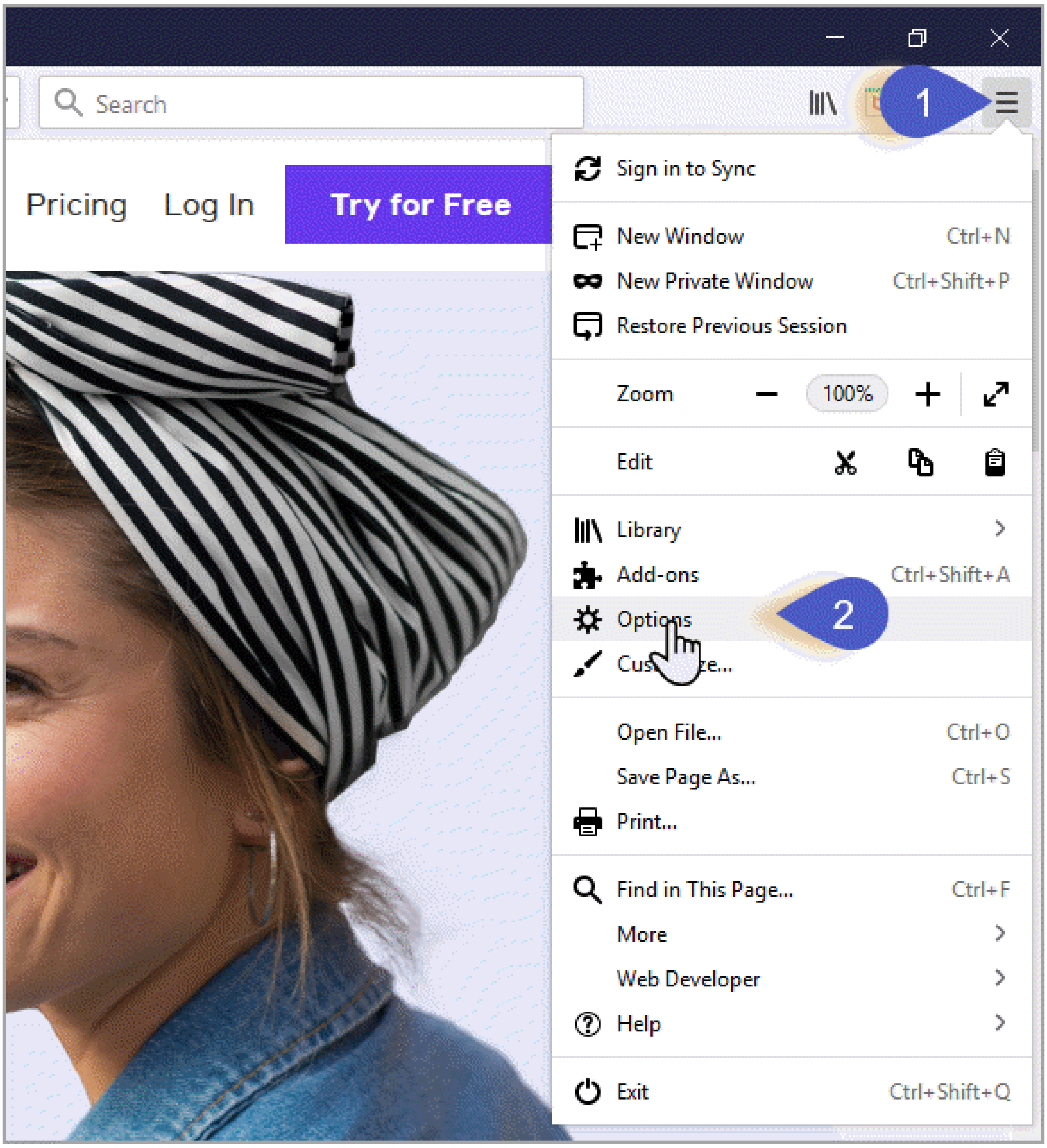


6. Check **Display Google Chrome in this language** & **Move to the top**

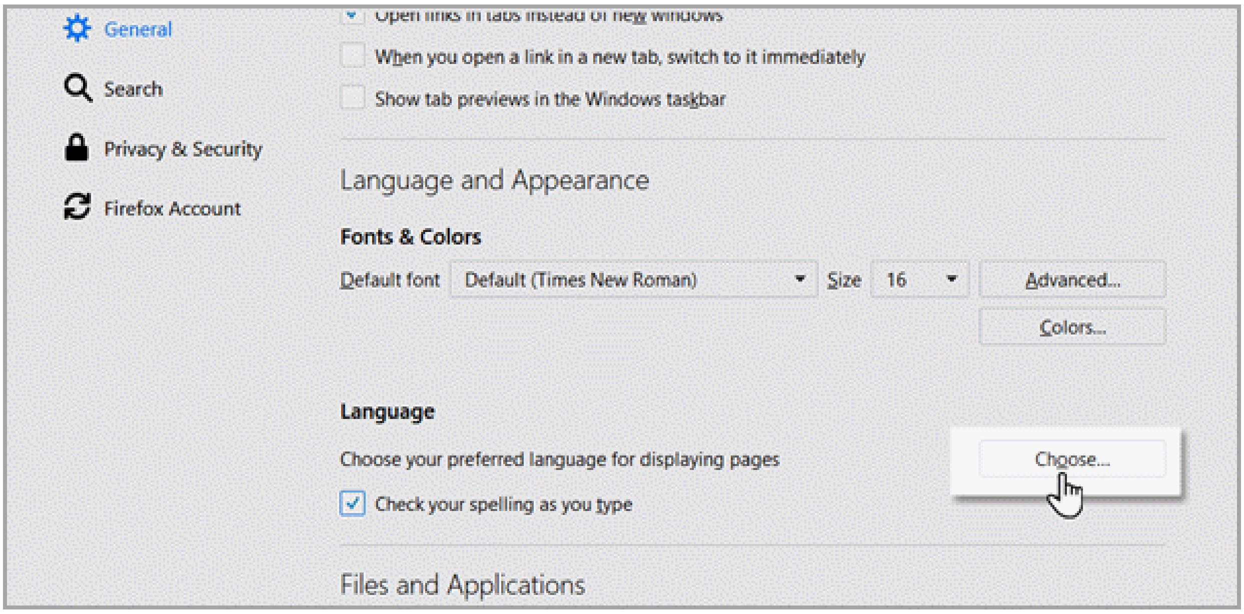


Set up the Firefox Time Zone Browser Setting

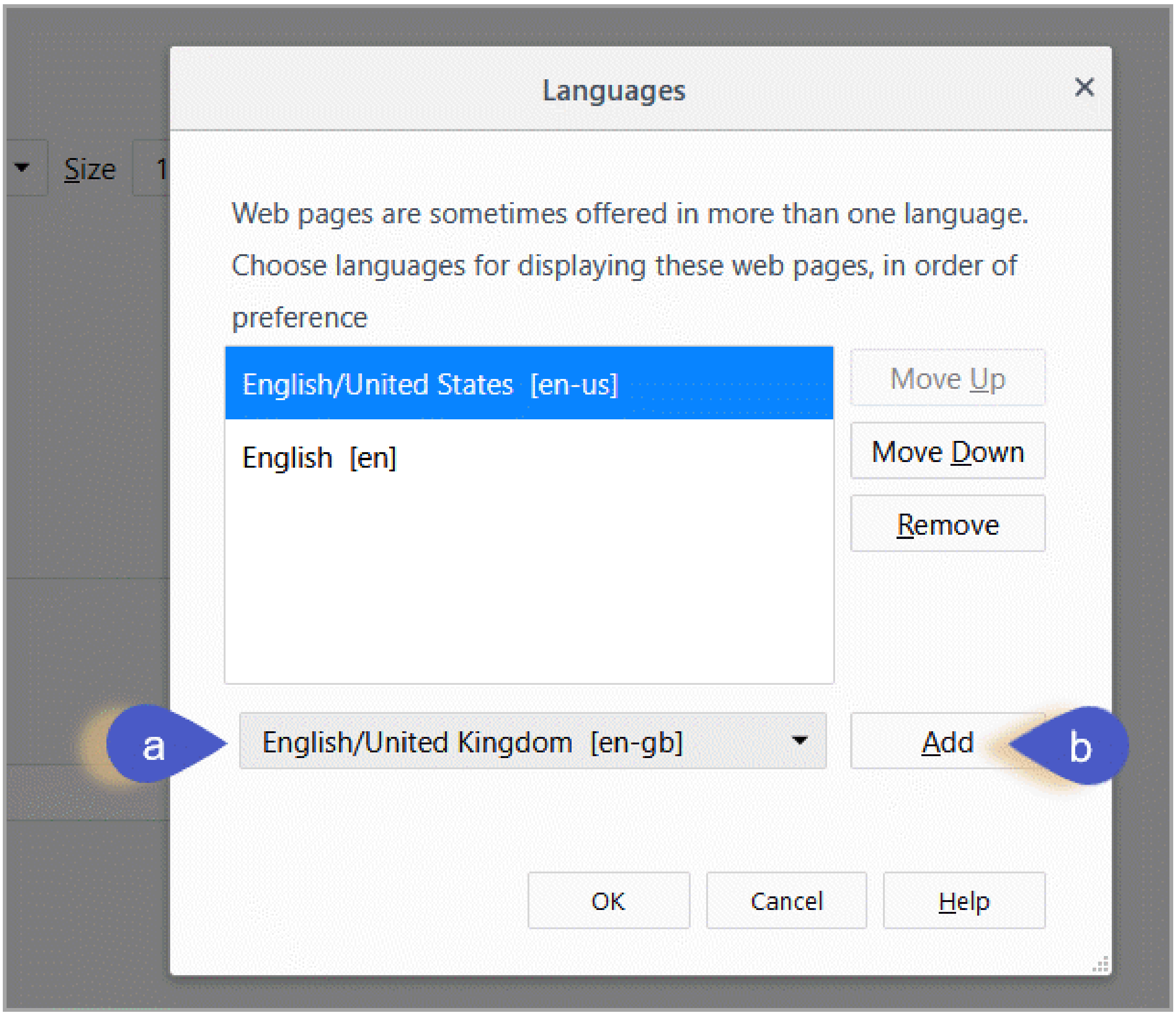
1. Click the hamburger menu in the top right and click **Options**



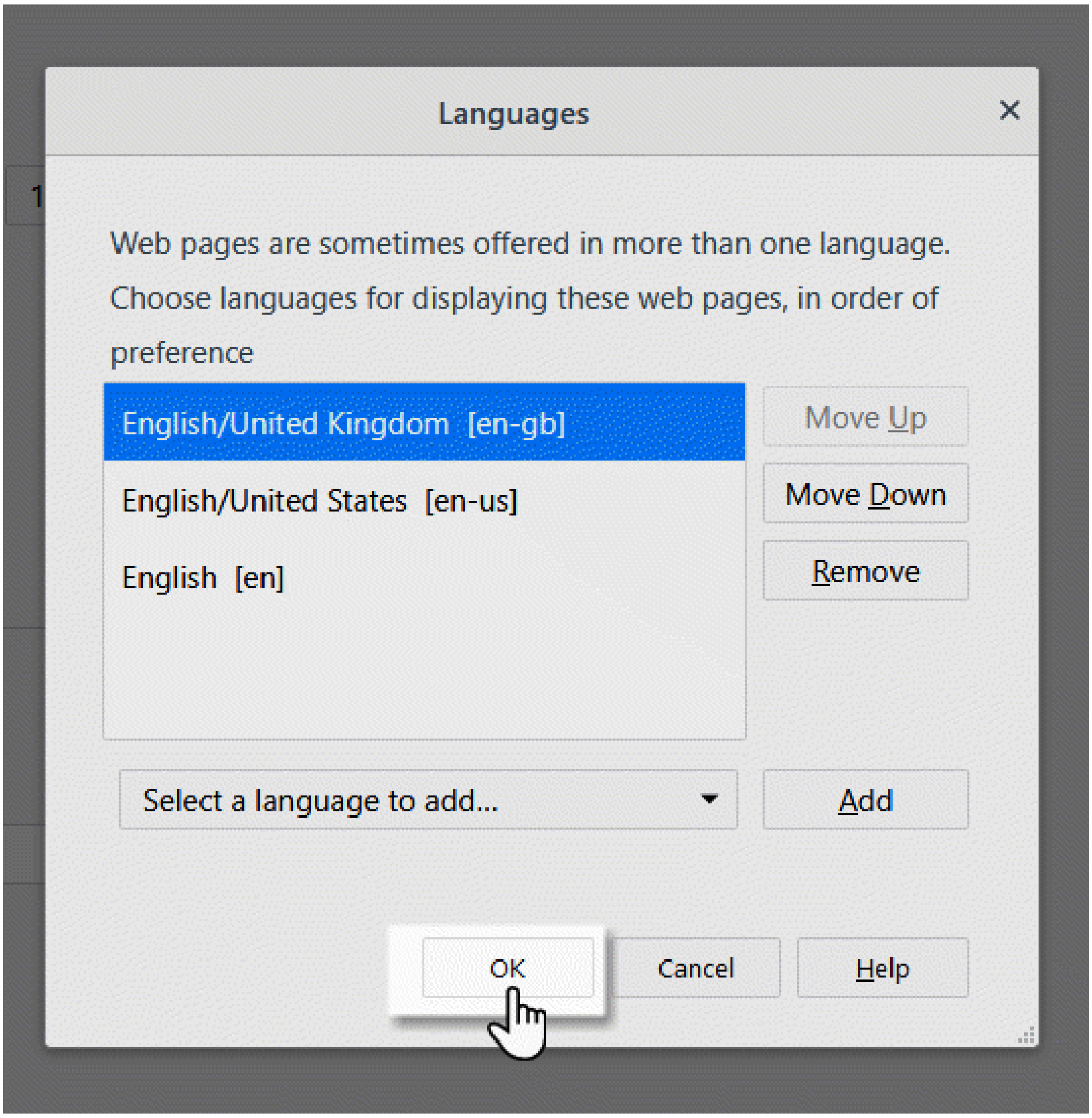
2. Search or scroll down to **Language and Appearance** and click **Choose**



3. From the drop down locate your language and click **Add**



4. Click **OK**


Languages
Web pages are sometimes offered in more than one language. Choose languages for displaying these web pages, in order of preference
English/United Kingdom [en-gb]
English/United States [en-us]
English [en]
Move Up
Move Down
Remove
Select a language to add...
Add
OK
Cancel
Help

Using a different version of Infusionsoft? Click Here to learn more

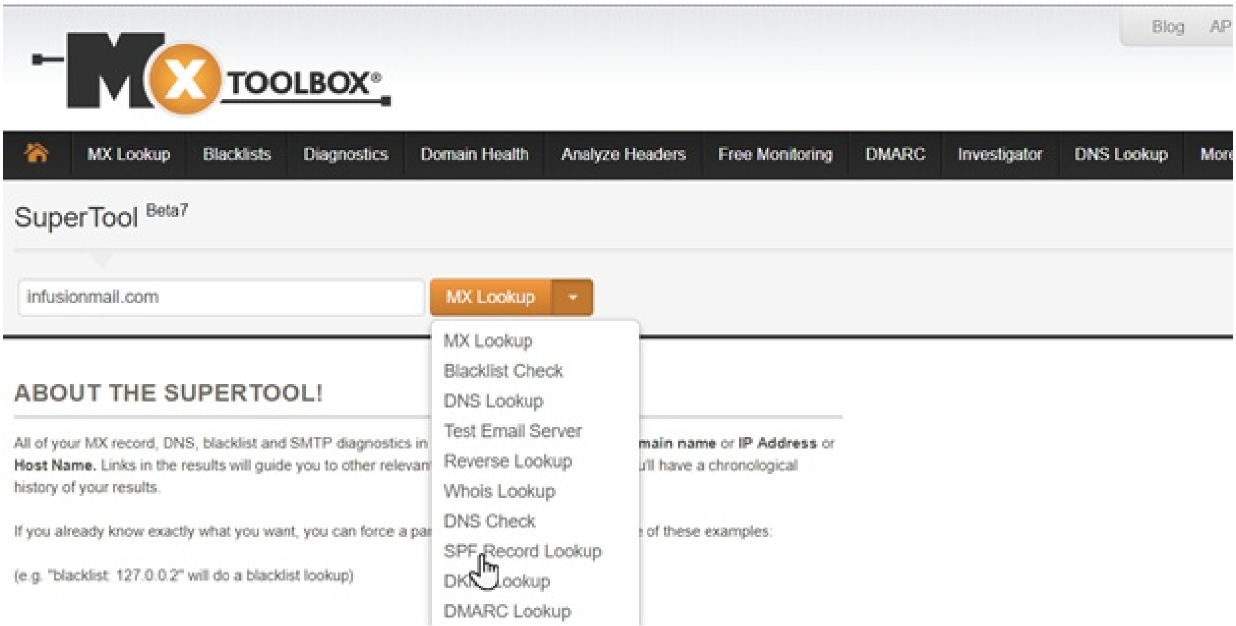
Infusionsoft Email IP Range

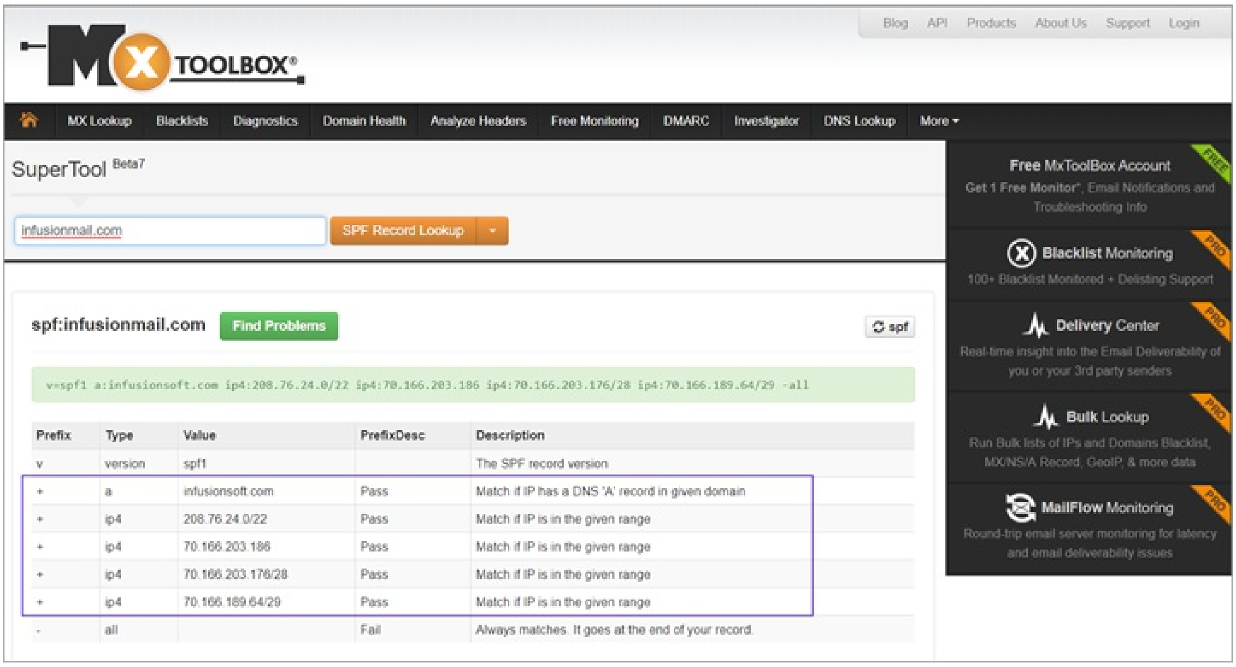
Last Modified on 08/13/2018 4:03 pm MST

The IP Address is subject to change. You should always look up our SPF record to get the latest IP Addresses.

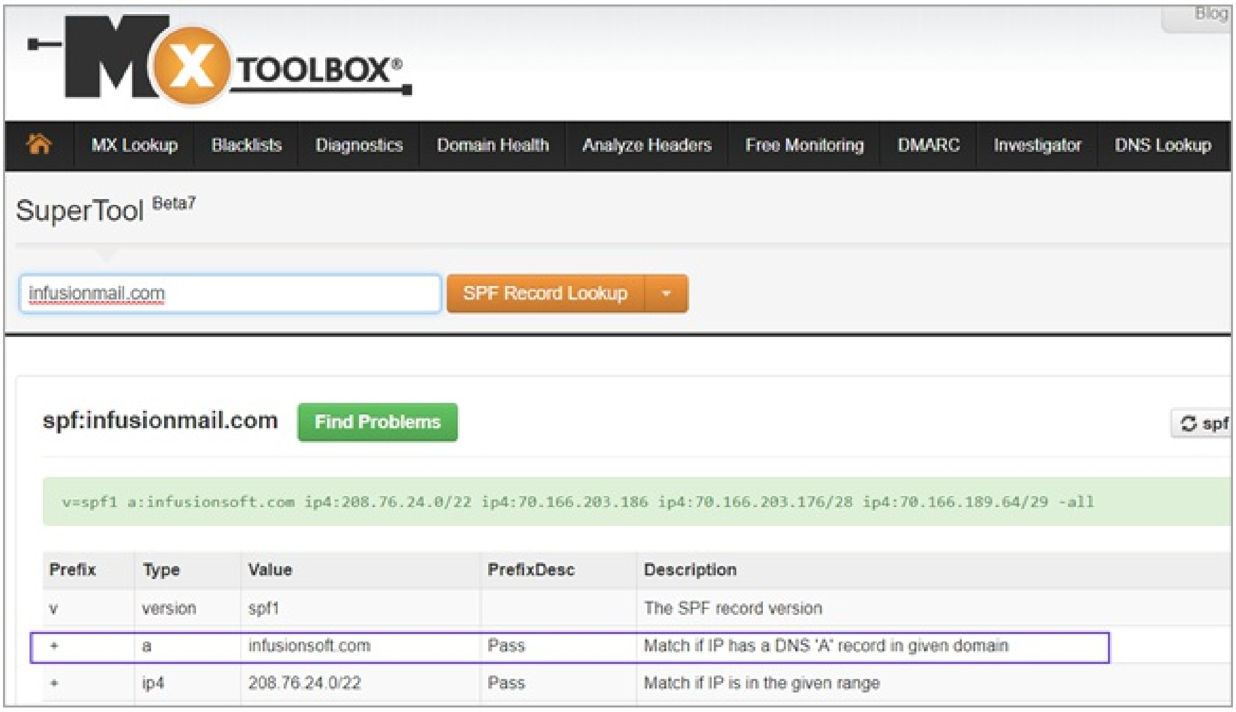
To search our SPF record use MXToolBox to search **infusionmail.com.**

- Paste **infusionmail.com** into the search field.
- From the "MX Lookup" drop down select "SPF Record Lookup"



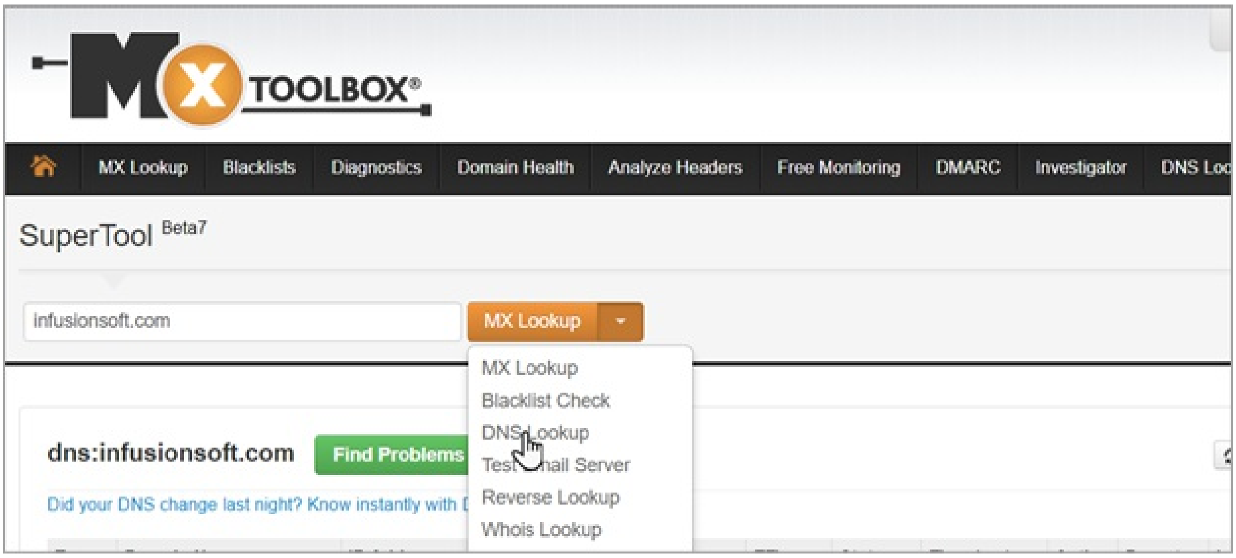


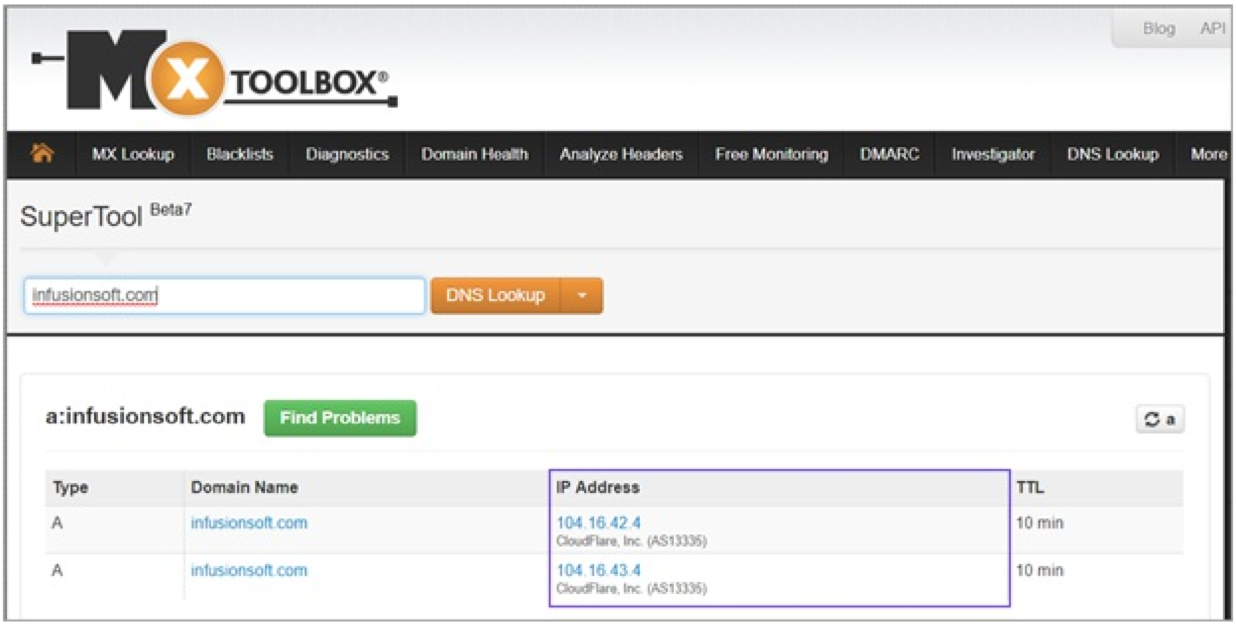
There's an **a:infusionsoft.com** in the SPF record which says that the **A** record of **infusionsoft.com** is also allowed to send mail.



That's a separate DNS lookup.

- Paste **infusionsoft.com** into the search field.
- From the "MX Lookup" drop down select "DNS Lookup"


TOOLBOX®
MX Lookup
Blacklists
Diagnostics
Domain Health
Analyze Headers
Free Monitoring
DMARC
Investigator
SuperTool Beta7
infusionsoft.com
MX Lookup
MX Lookup
Blacklist Check
DNS Lookup
Reverse Lookup
Whois Lookup
dns:infusionsoft.com
Find Problems


Blog
API
TOOLBOX®
MX Lookup
Blacklists
Diagnostics
Domain Health
Analyze Headers
Free Monitoring
DMARC
Investigator
DNS Lookup
More
SuperTool Beta7
infusionsoft.com
DNS Lookup
a:infusionsoft.com
Find Problems
Type
Domain Name
IP Address
TTL
A
infusionsoft.com
104.16.42.4
CloudFlare, Inc. (AS13335)
10 min
A
infusionsoft.com
104.16.43.4
CloudFlare, Inc. (AS13335)
10 min

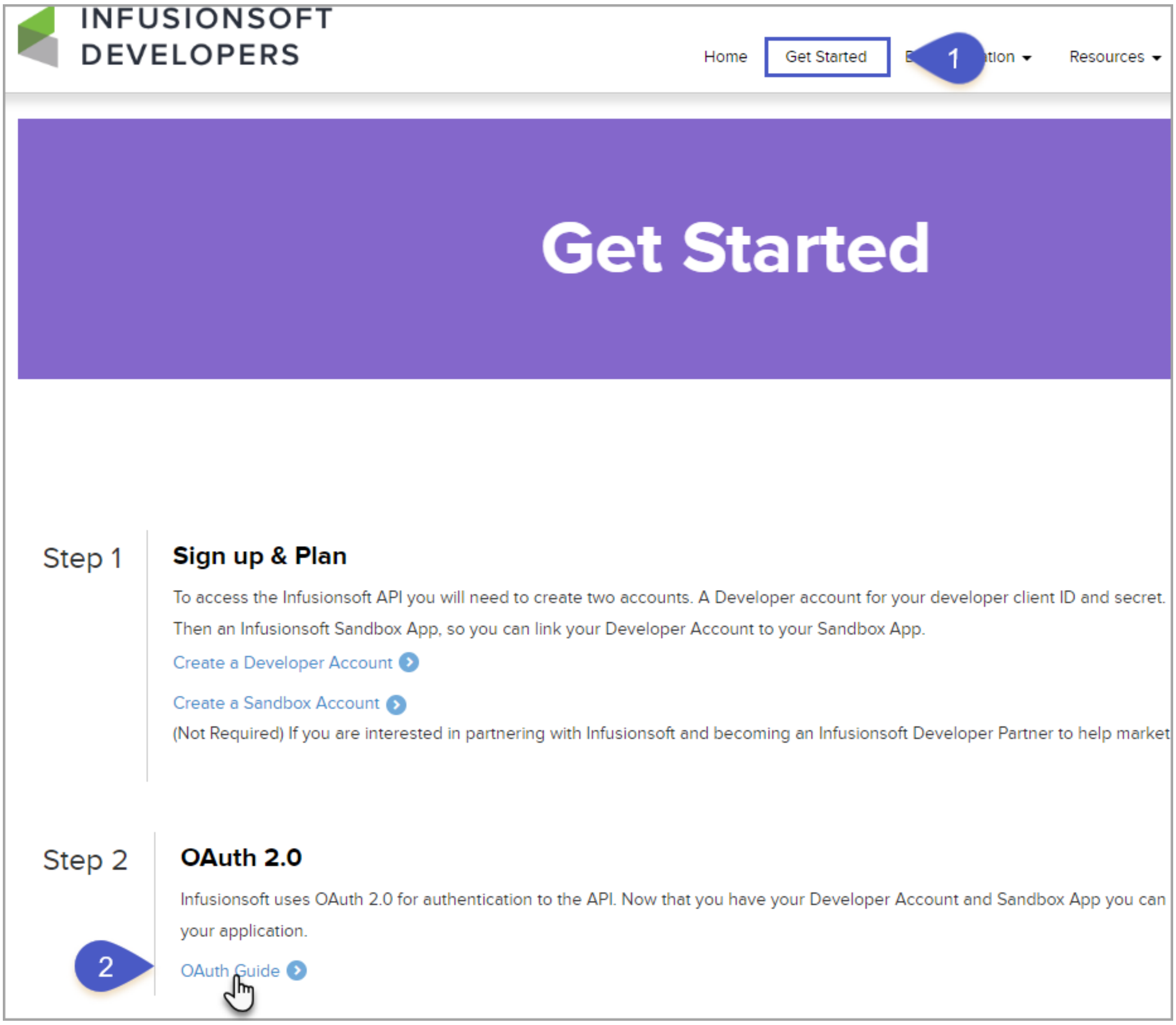
Using a different version of Infusionsoft? Click Here to learn more

OAuth Authentication

Last Modified on 08/13/2018 12:23 pm MST

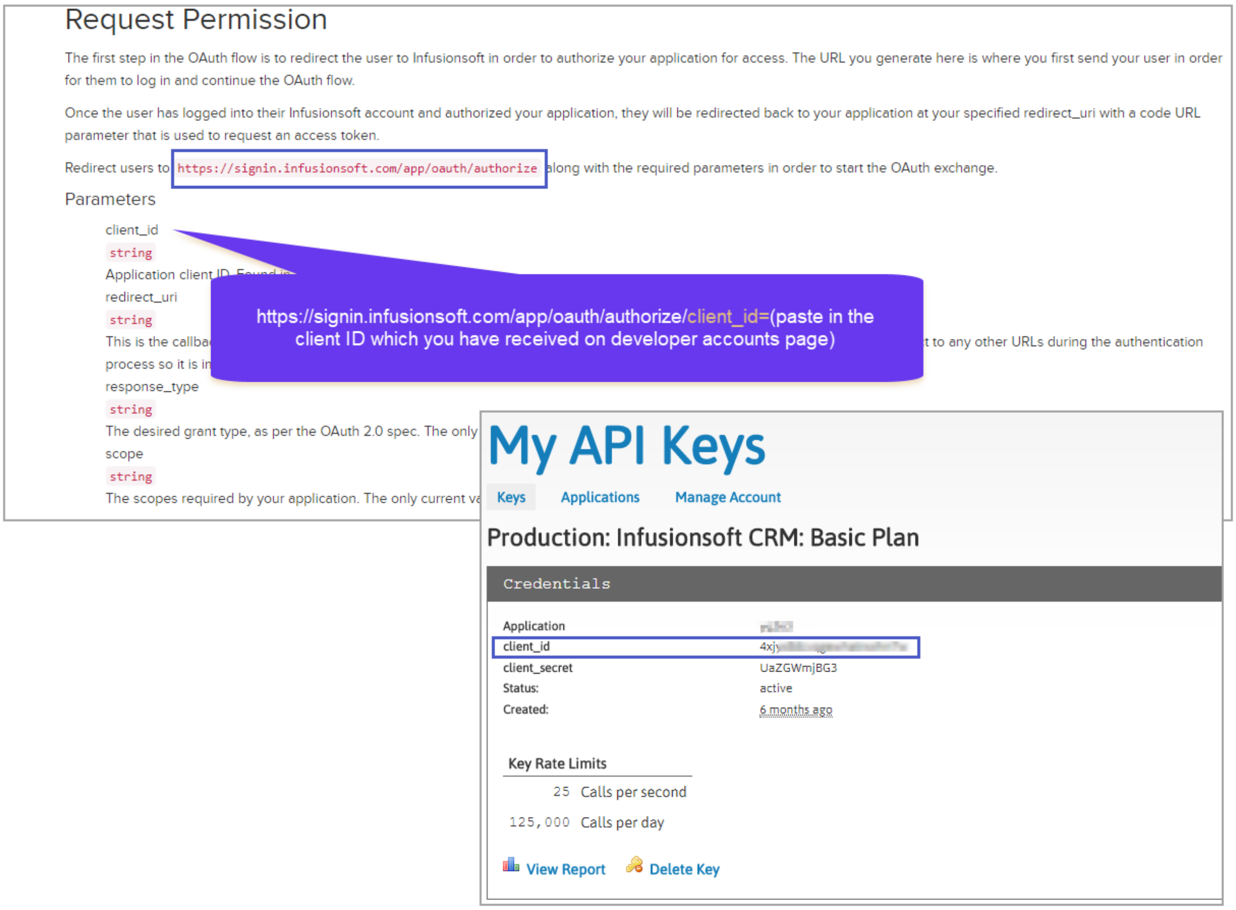
Pro tip! Click images to view larger

1. Create an account on developer.infusionsoft.com
2. Login to the **developer account**
3. Click on "**Get Started**"
4. Scroll down and click on "OAuth **Guide**" under OAuth 2.0 **Step 2**



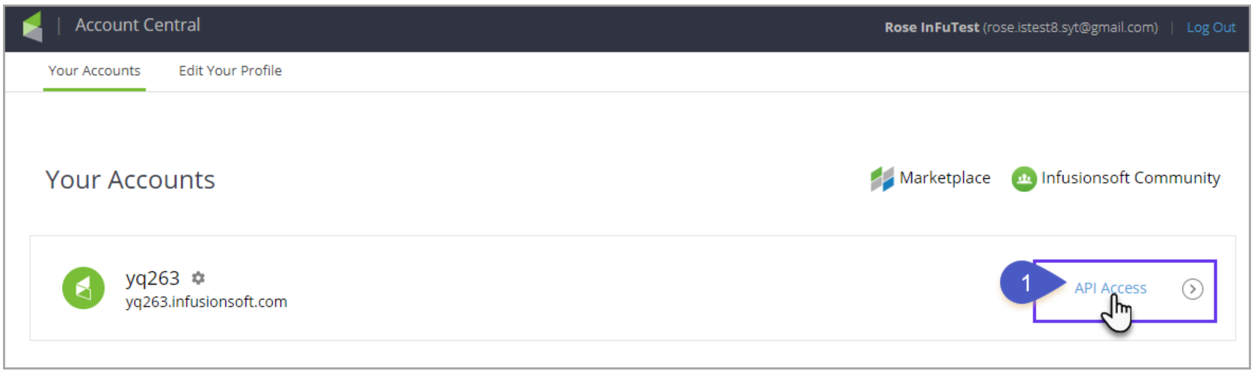
5. Under **Step** 3 click "**Request Permission**"

6. Copy and paste this link in a new tab. "https://signin.infusionsoft.com/app/oauth/authorize/client_id=(paste in the client ID which you have received on developer accounts page)"

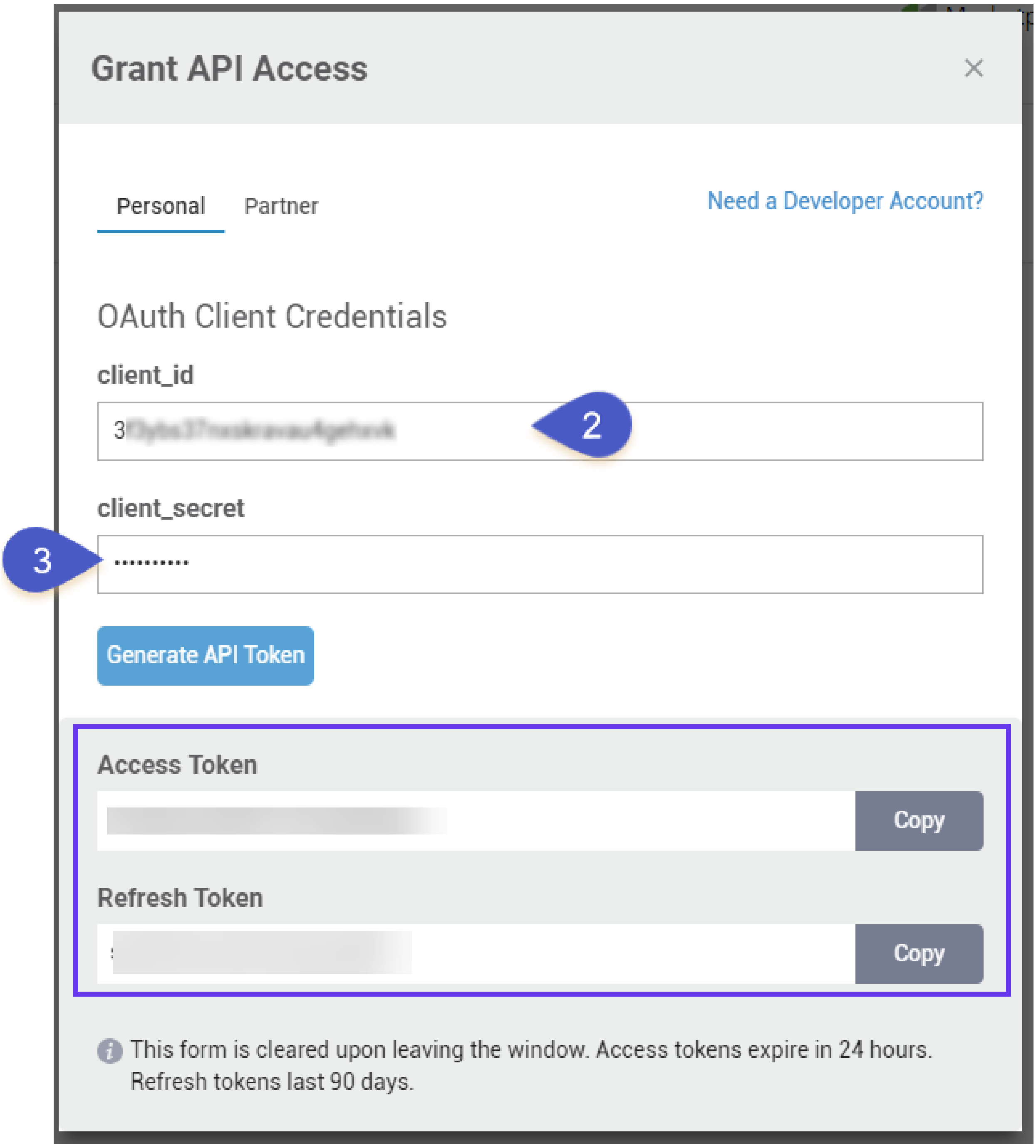


- Ensure that the you are logged in to the application
- You will be taken to your Account central.

7. Click on "**API Access**"



   a. Paste your "**Client ID**" and **"Client secret"**
   b. Click on "**Generate API Token"**


Grant API Access
Personal
Partner
Need a Developer Account?
OAuth Client Credentials
client_id
2
client_secret
3
Generate API Token
Access Token
Copy
Refresh Token
Copy
This form is cleared upon leaving the window. Access tokens expire in 24 hours. Refresh tokens last 90 days.

Using a different version of Infusionsoft? Click Here to learn more

Increasing Email Open Rates with Emojis

Last Modified on 09/13/2018 11:05 am MST

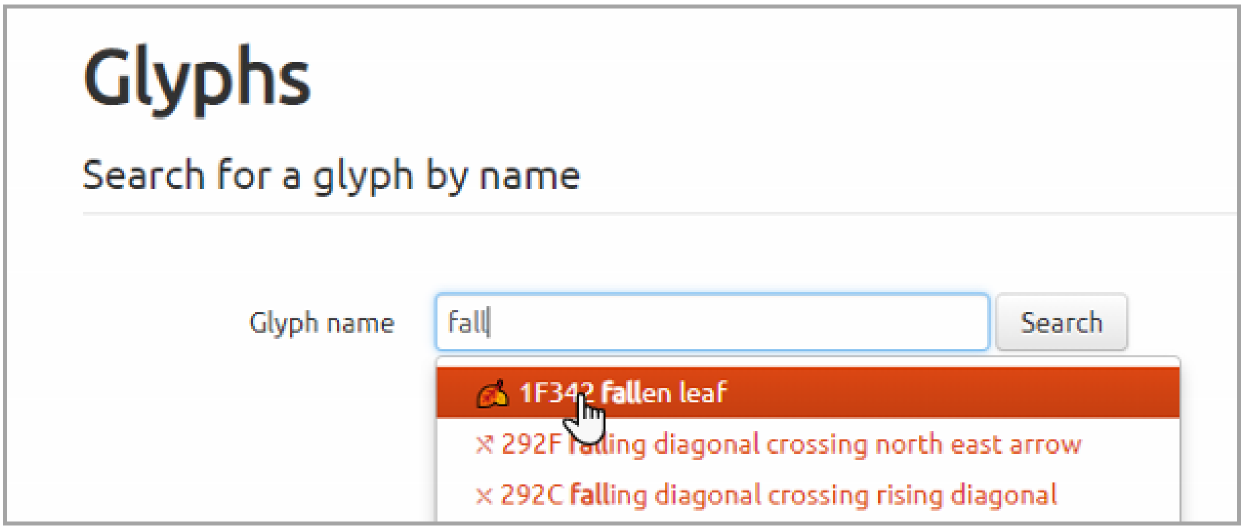
Emojis can be a nifty choice when there is a word in your subject line that you can replaced with an image. For example, instead of “love” use “❤️” for a Valentine’s Day promotion. This helps shorten the subject and makes it stand out. That being said you do not want the meaning lost, so use this approach only when your message can read without the word itself. Strategically using emoji in your subject line can increase opens, but overusing them can make your email look like spam.

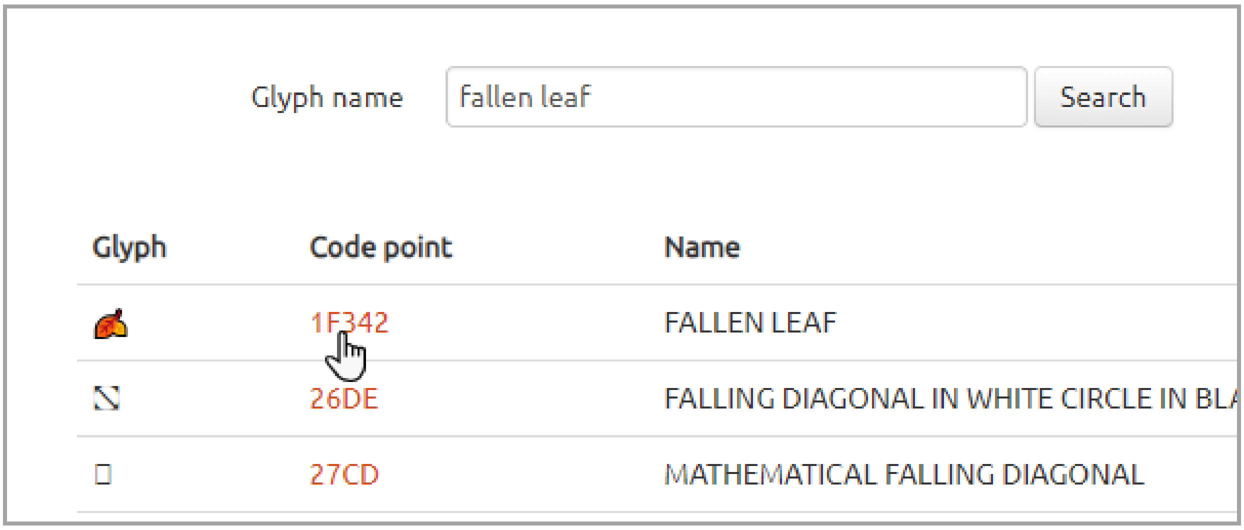
Note! Adding emoji to a bad subject line only makes the subject line worse, so stay away from phrases that are known to trigger spam complaints. Click here to learn how to use the **Content Checking Tool**, which can help check for spam triggers.

To add emojis to your email subject line

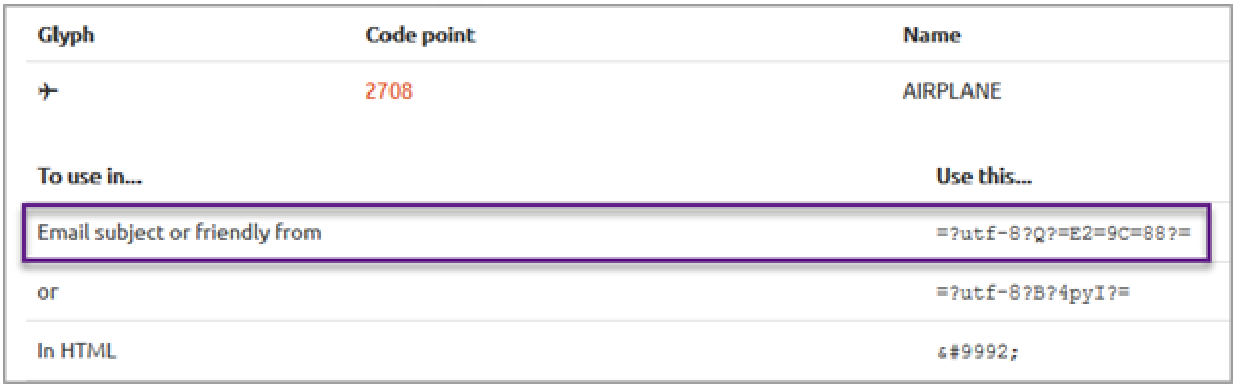
1. Go to https://emailstuff.org/glyph (See Resources below for additional option)

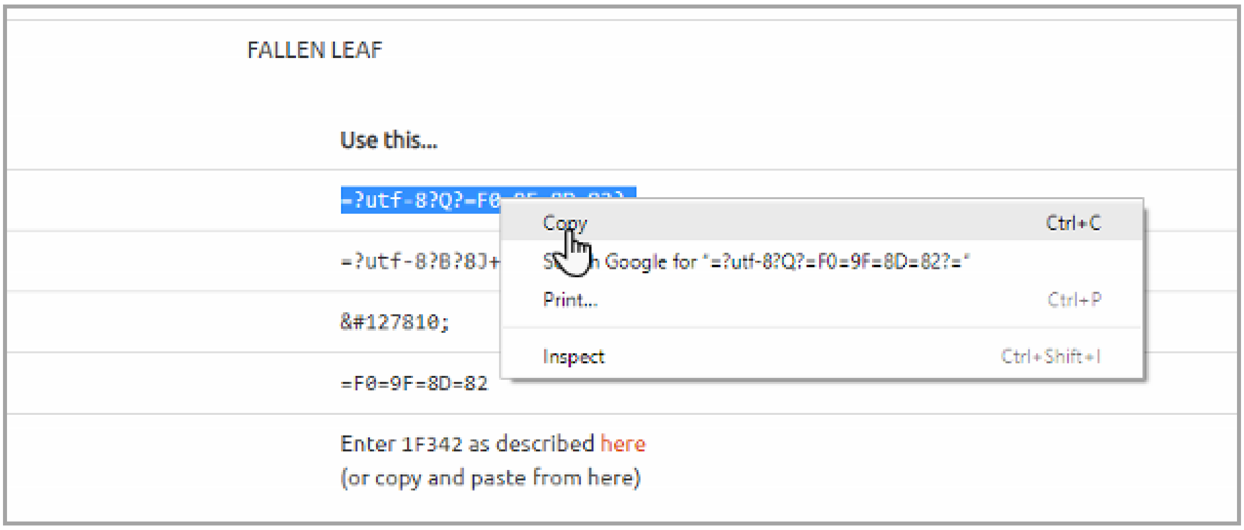
2. Search for the emoji you would like to use and click the **Search** button.



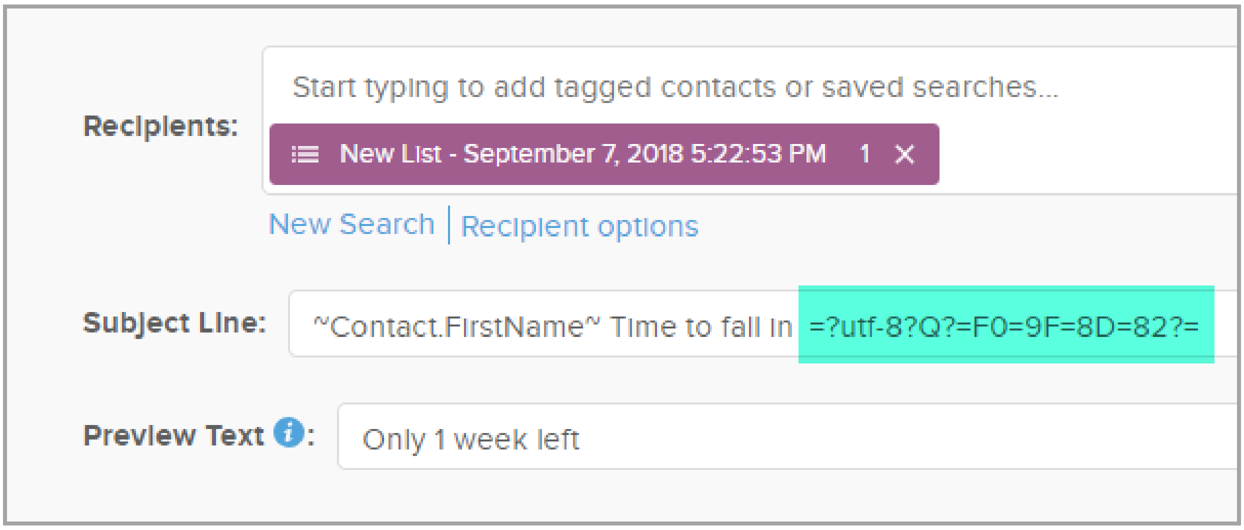


3. Highlight and copy the code next to "Email Subject or friendly form.



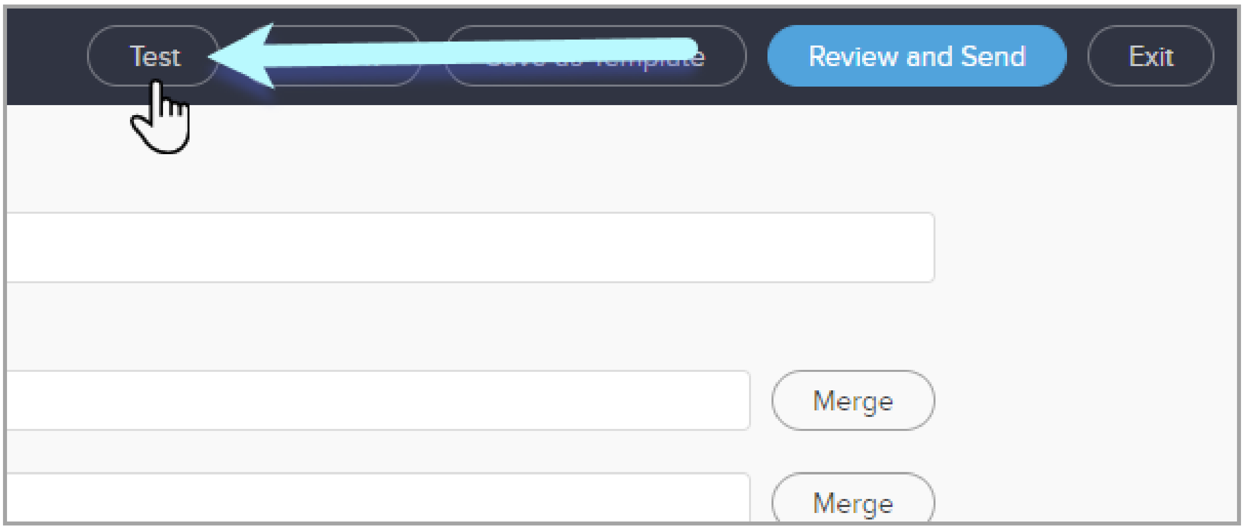


4. Paste the code into the subject line of your email where you would like the emoji to appear.



Note! This will not display if added to the**Preview Text**

6. Make sure to test your the email before sending! Emojis can render differently on every email client.



What to keep in mind

- Stay within your brand
- Know Your Content
- Keep It Relevant
- Convey an Emotion
- Only use between 1-2 in a Subject

Pro tip! Test your Audience by doing a simple subject line A/B test to see how they affect your open rates.

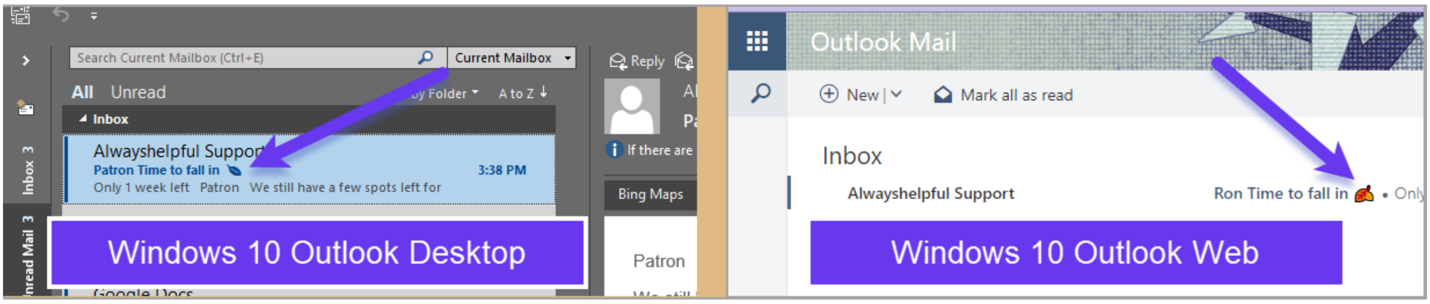
The Top Ten Emoji

Registered Trademark	Red Heart	Loud speaker	Tulip	Sun	Delivery Truck	Trade Mark	Party Popper	Fire	Sparkles
®▯	❤▯	▯	▯	☀▯	▯	™	▯	▯	▯

Opening emails on different OS & Email clients

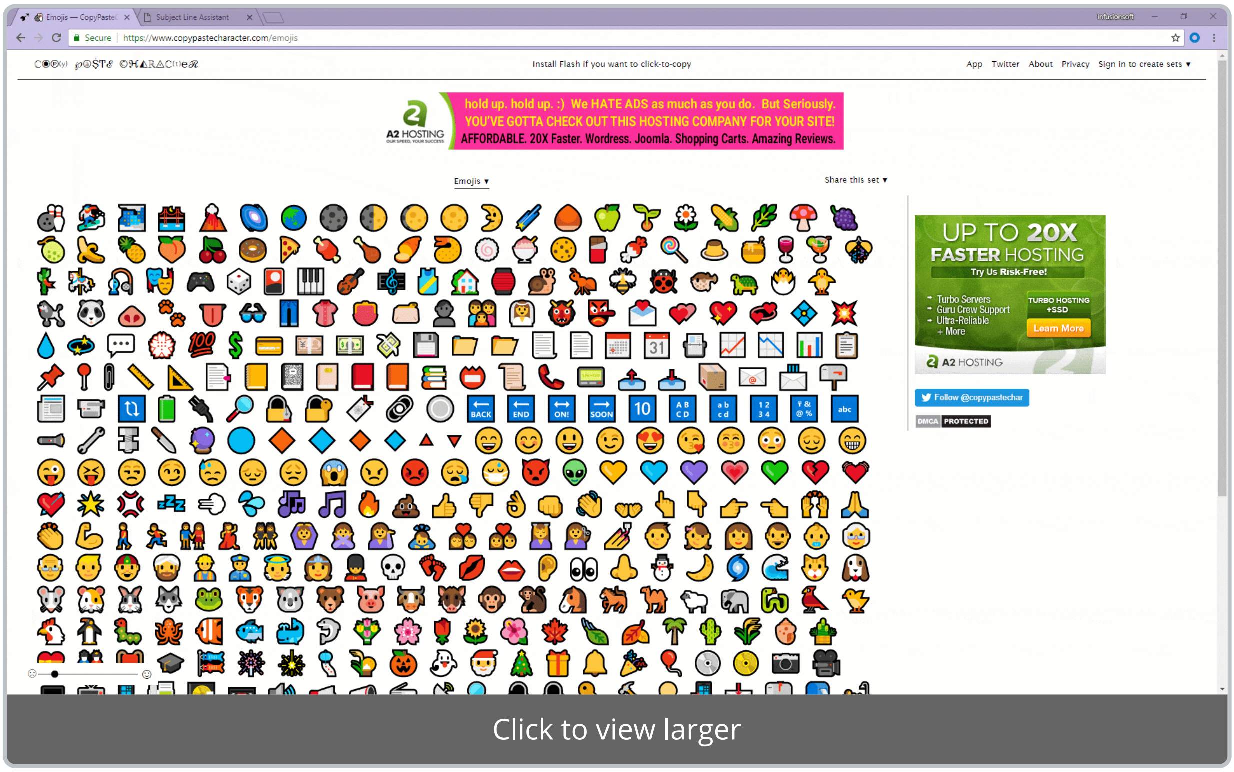
Take into account your subscribers' email client and operating system. Different email clients render emojis differently, and some of them may not even render these emojis. The same goes with the Operating system. **Windows 7 has very limited support for emojis**

Outlook Desktop vs Outlook Web



Resources

- 2016 analysis reported a 775% annual increase in marketing messages that contain emoji
- Go to https://www.copypastecharacter.com/emojis or https://emojipedia.org copy emoji and then go to https://tools.bluestatedigital.com/kb/subject-line-assistant and paste. Use the encoded string to add to your Subject line.



Any links we provide from non-Infusionsoft sites or information about non-Infusionsoft products or services are provided as a courtesy and should not be construed as an endorsement by Infusionsoft.

Using a different version of Infusionsoft? Click Here to learn more

I Just Purchased Infusionsoft and Need to Set it Up for the First Time

Last Modified on 02/13/2018 1:09 pm MST

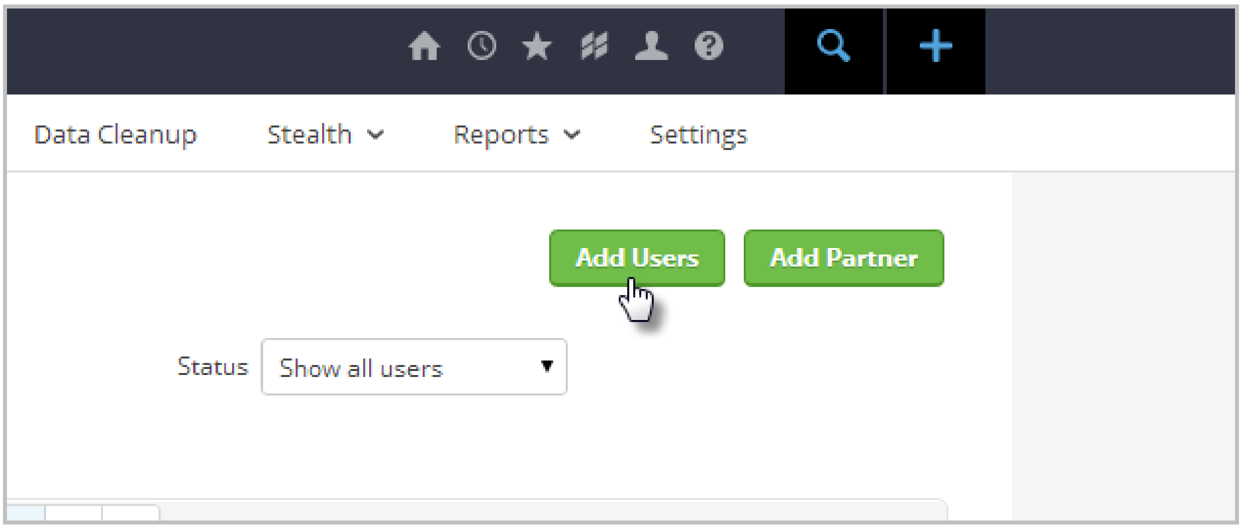
Please note! Most of features described in this article require you to have Admin permissions in Infusionsoft.

Review the Basic Getting Started Guide

First, review the basic getting started guide for all new Infusionsoft users in order to learn the basic concepts in Infusionsoft.

Add or Remove users

Learn how to invite new users and remove old users from your Infusionsoft account (**Admin** > **Users**).

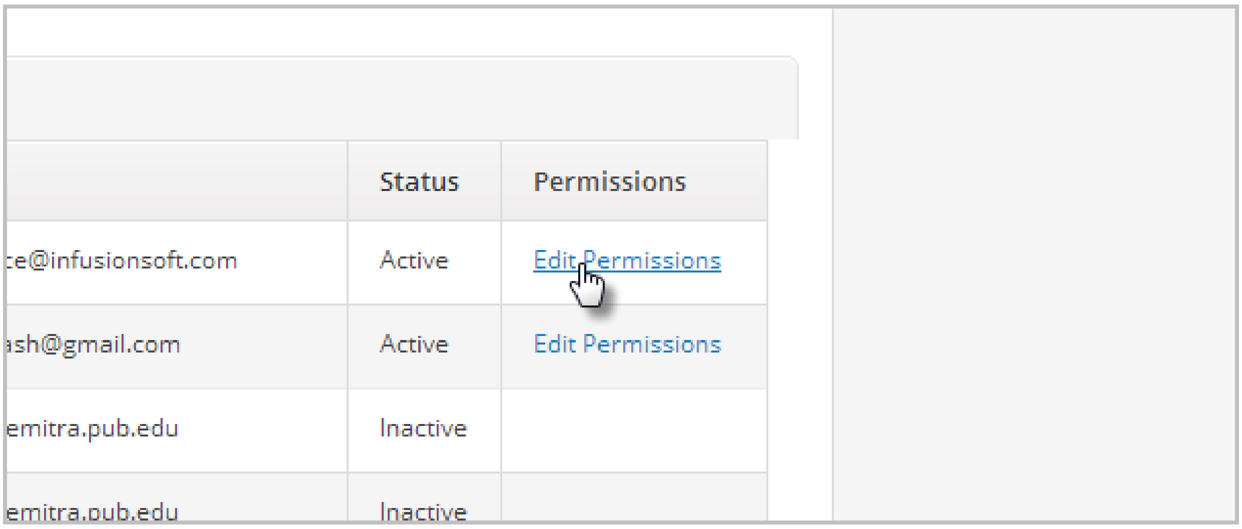


Set User Permissions

Infusionsoft has a very extensive permission structure allowing you to gate users from accessing certain areas or performing certain tasks in Infusionsoft. If another user in your account says, "Why can't I see X" - it's likely because they don't have permission to do so. Go to **Admin** > **Users** and click the **Edit Permissions** link to start configuring the permissions for a particular user. You can find an exhaustive list of permissions here .

Here are Top 5 Most Common Permissions That New Admins Change:

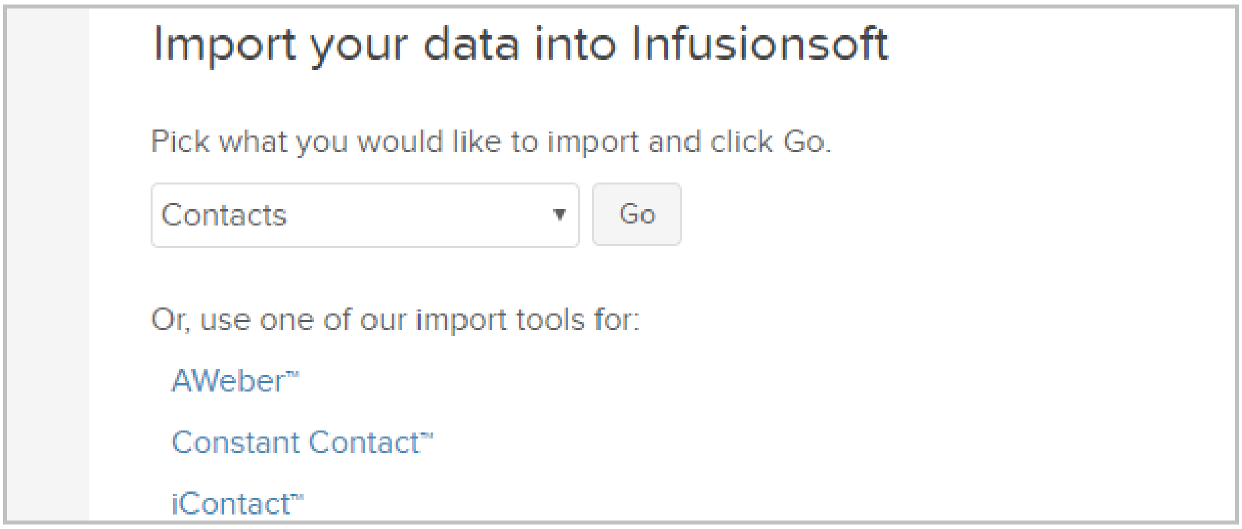
- How can my users see each other's calendars?
- I don't want my users to see each other's contacts
- I don't want my user to export lists from Infusionsoft
- Why can't my user add a tag ?
- I need to give my user the ability to edit marketing campaigns



Import Contacts

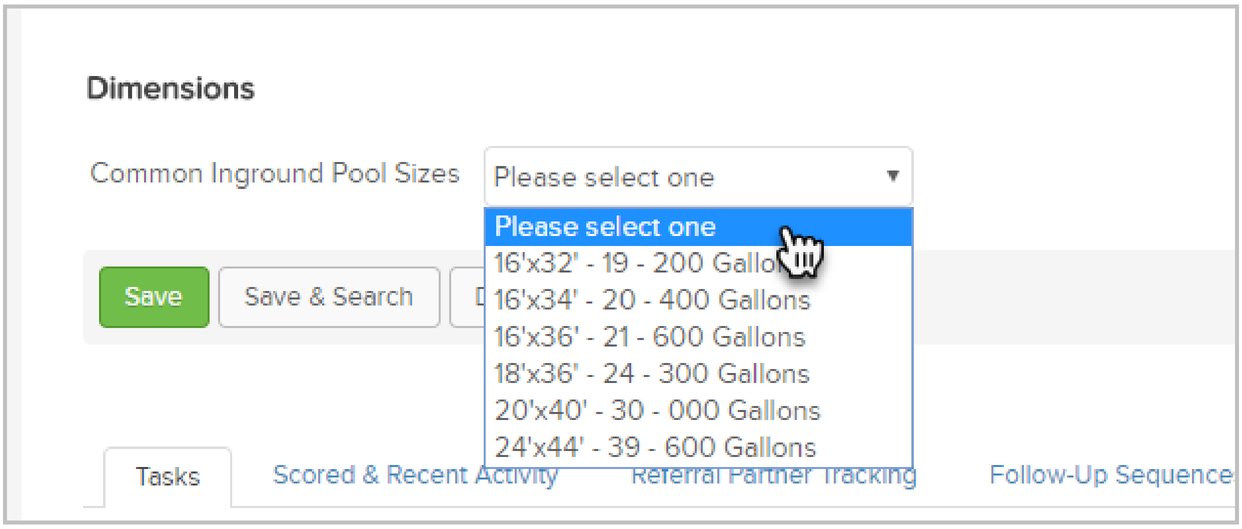
You can upload your own *.csv* file or use one of our native import tools to get your contacts into Infusionsoft.

1. First, take a look at the Import FAQ
2. (optional) Export from your current system
3. Prepare your csv file
4. Import Contacts
5. How to view and rollback imports



Custom Fields

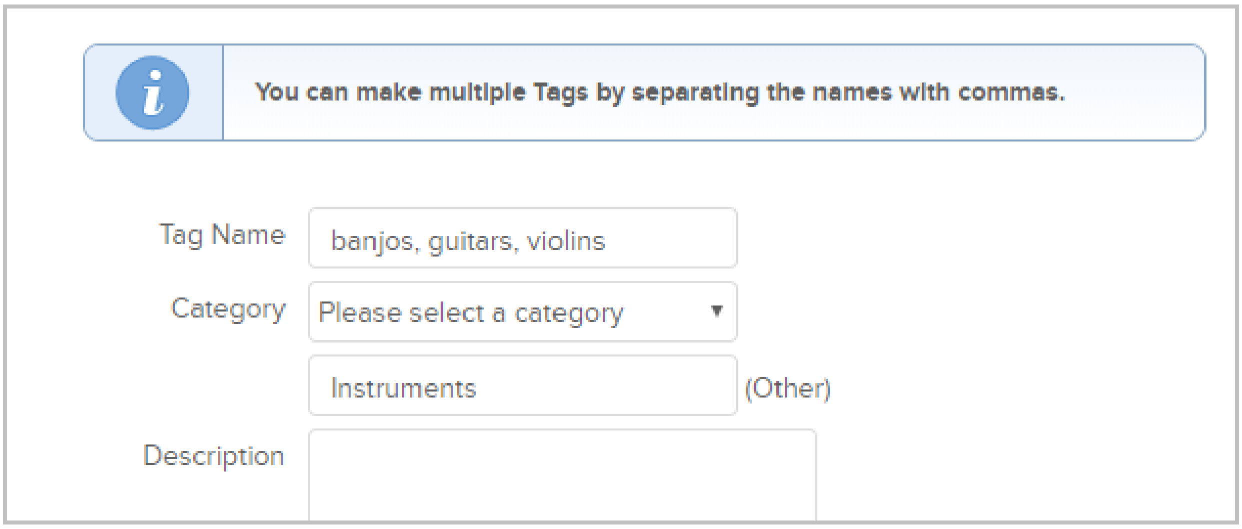
1. Choose the types of custom field(s) that best fits your needs. This article will show you how to choose the right field type when you need to store data that isn't native to Infusionsoft.



2. Once you've learned about all the custom field types available in Infusionsoft, follow this guide to learn how to create and manage them.

Segment Your Contacts

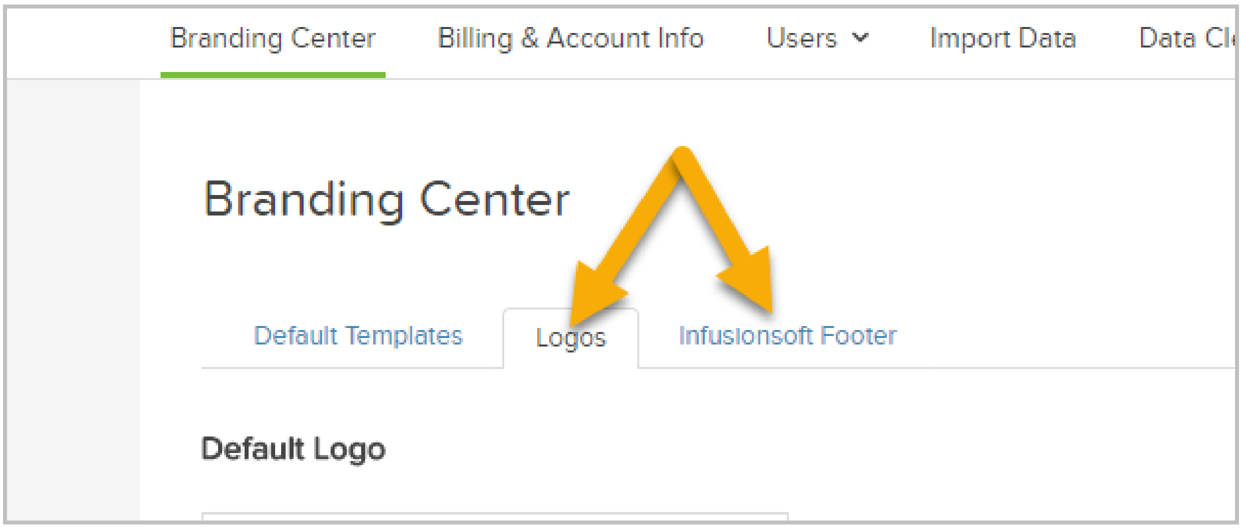
Most of the time, tags are create on-the-fly when you are setting up automation. Click here to learn how to create and manage your tags and tag categories.



Set up the Branding Center

There are only a couple things in the Branding Center that will apply to you.: **Uploading your business logo** and configuring a setting that controls **Infusionsoft branding in the footer of your marketing emails**. You may have already uploaded your logo when you first set up your Infusionsoft account, so this may be an optional step for you.

Pro-Tip! Unless you are already using legacy features, you can ignore the **Default Templates** tab.

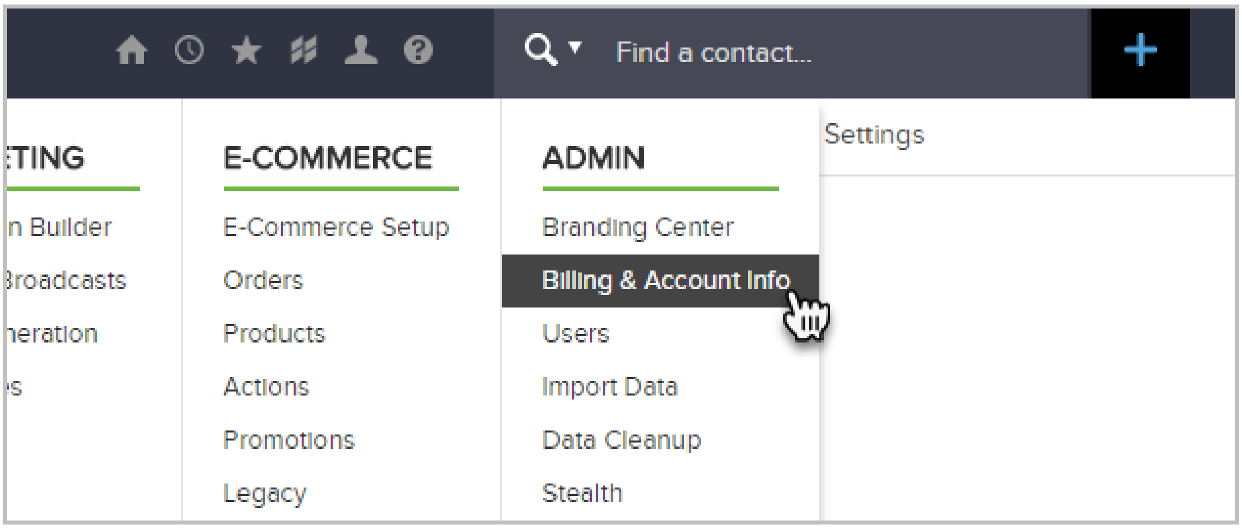


Improve Email Deliverability with DKIM & DMARC

Learn how DKIM can help you achieve better deliverability. Do you use a Gmail, Yahoo or another "free" email service? Learn why sending emails from Infusionsoft with these emails will result in poor deliverability.

Update your Billing Information

Click here to learn how to make changes to your payment and personal information we have on file for your account.



Make a Payment on Your Infusionsoft Account

Learn how to make a payment on your Infusionsoft account.

Upgrade Your Account Users Or Contact And Email Levels

Learn how to add more users, email and contact capacity .

Using a different version of Infusionsoft? Click Here to learn more

I'm New and Just Want to Learn the Basics

Last Modified on 06/21/2018 9:30 am MST

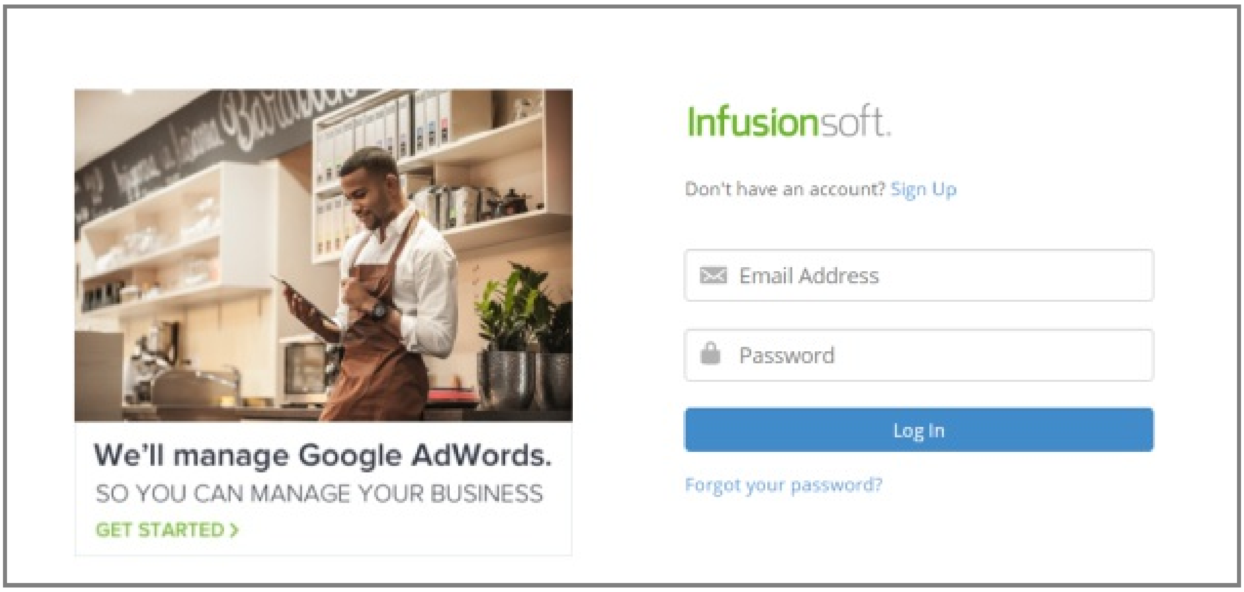
Download the Full PDF Version

Before you start...

If you have questions about how to use Infusionsoft, check the Help Center first. At the bottom of each article, please let us know if you found the resource helpful so that we can ensure you always have the most accurate and helpful content available.

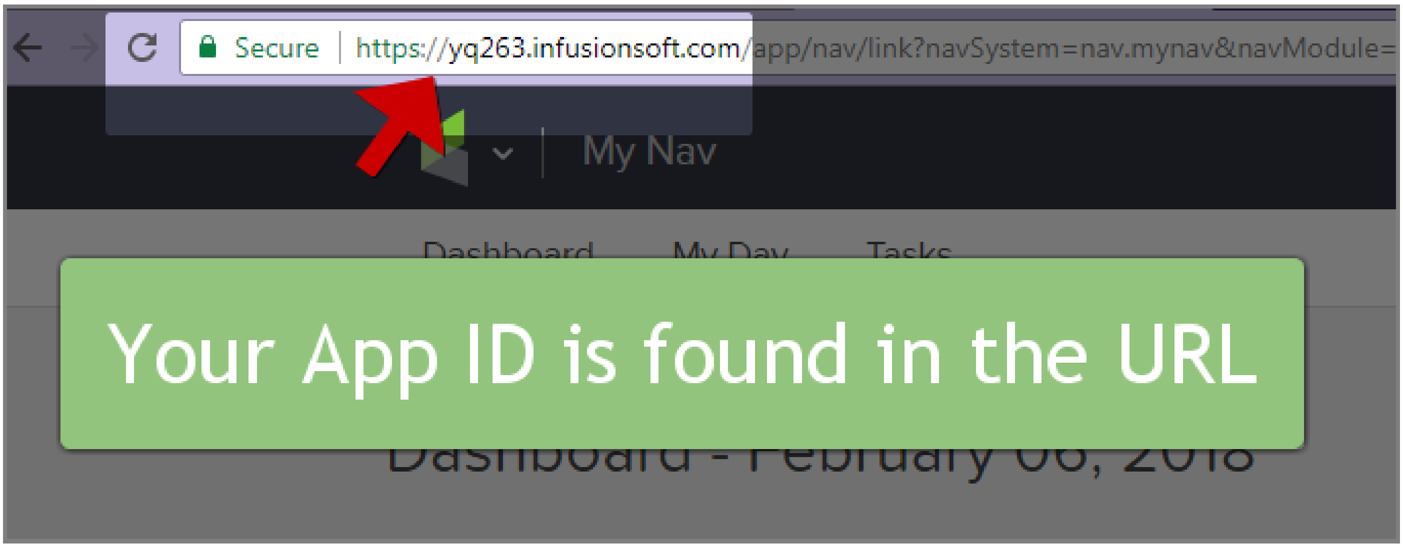
Sign in to Infusionsoft

After you set up your Infusionsoft ID, go to signin.infusionsoft.com to sign in with your email address and password. Here is a full step by step walk through of how to create your Infusionsoft ID .



Your "App Name" or "App ID"

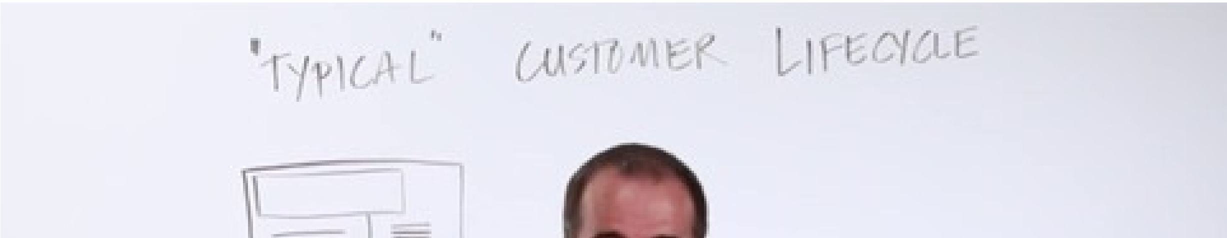
If you ever need to contact Infusionsoft Support, you will be asked to provide your **App Name** - this can be found by signing in to your Infusionsoft account and looking at the URL prefix. In the screenshot below, the App Name is **yq263**.



Watch these introductory videos!

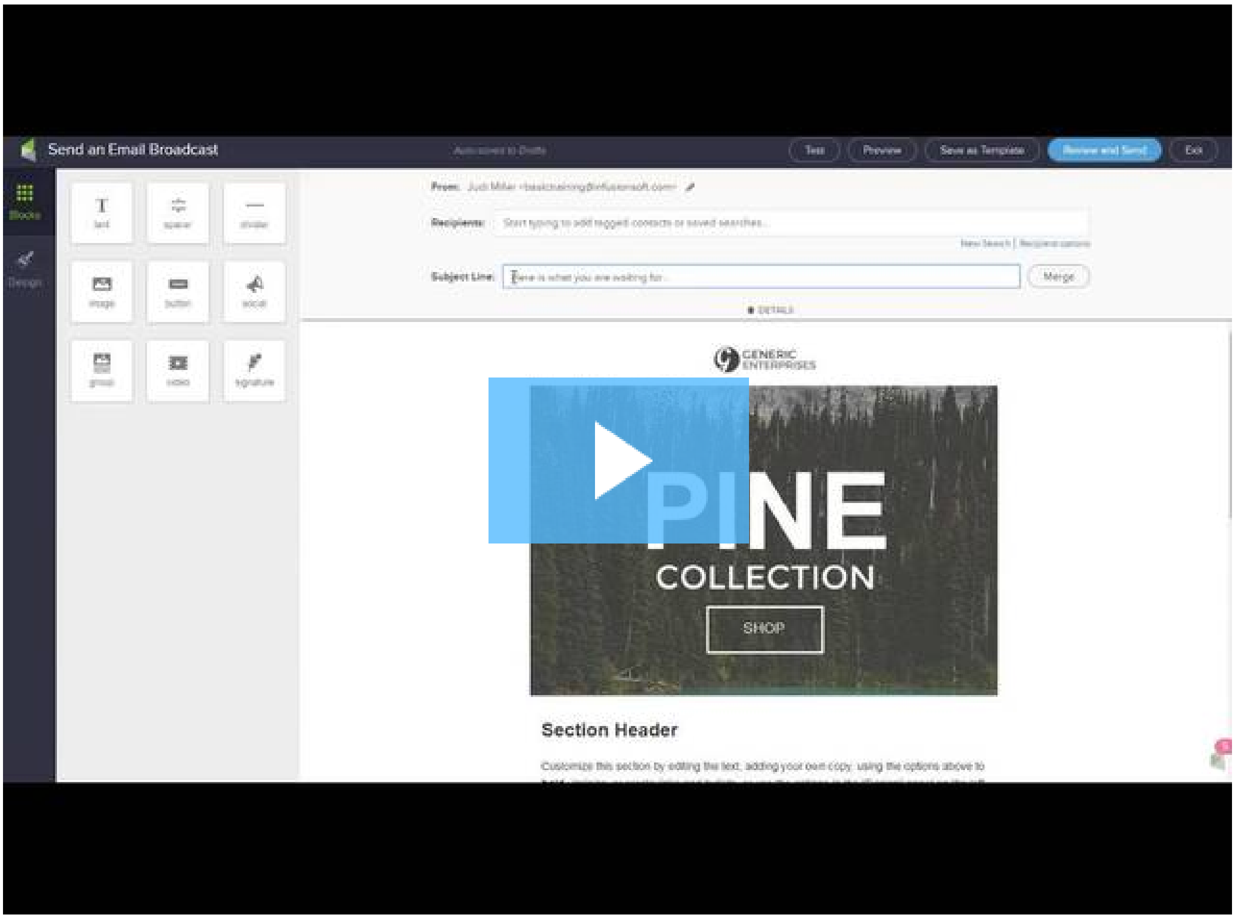
Navigate Infusionsoft

Lifecycle Marketing



Campaign Builder Basics

Email Builder Basics

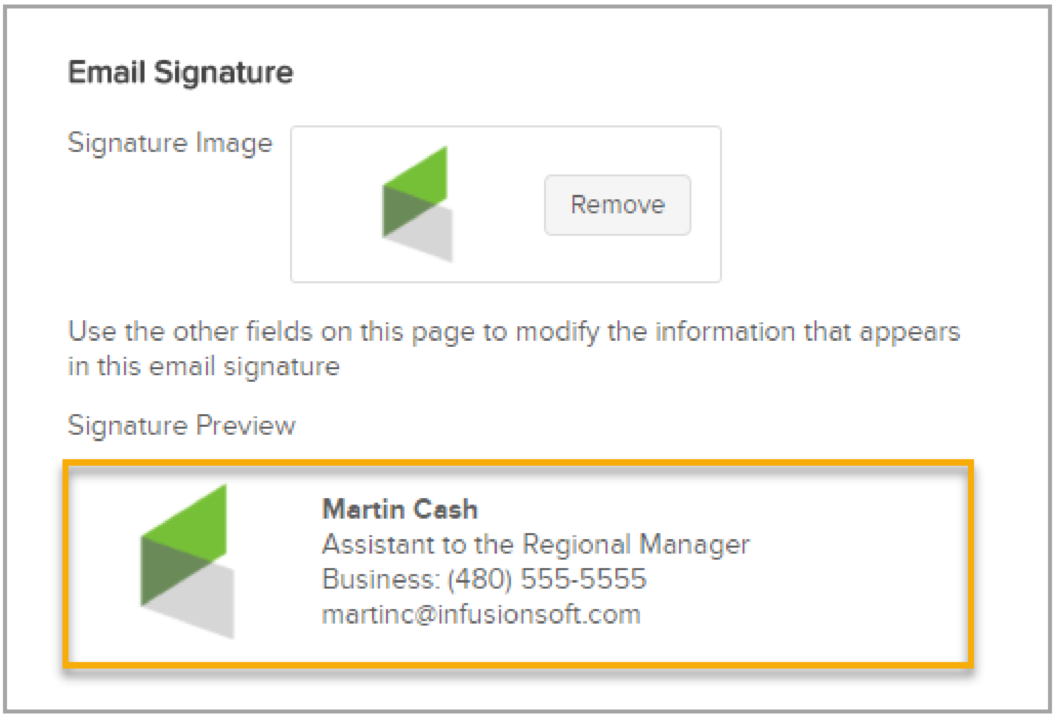


Landing Page Builder Overview

Coming Soon

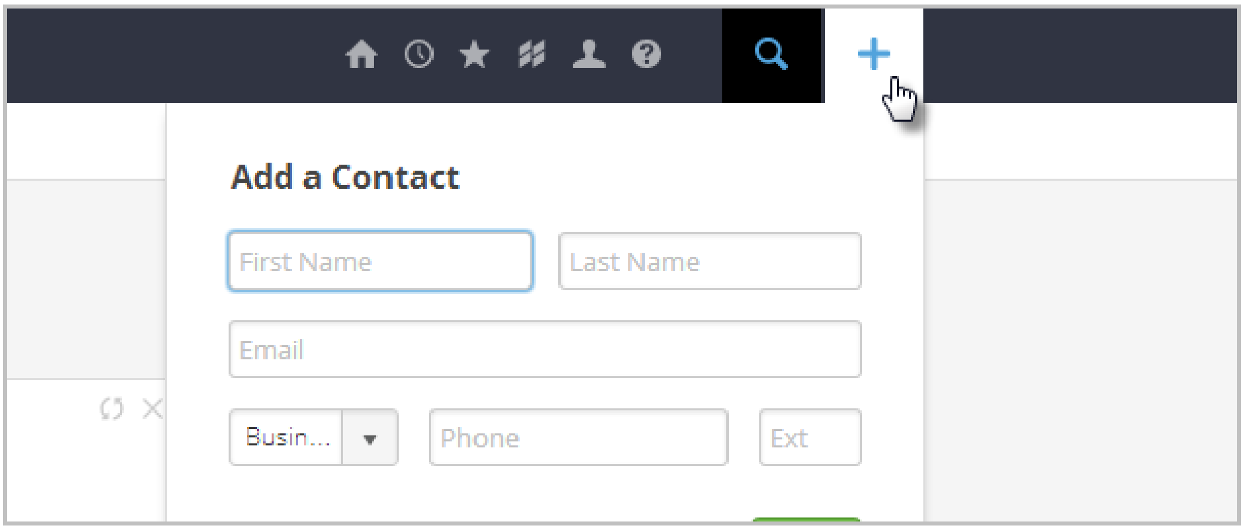
Customize your email signature

Learn how to customize your email signature for outbound emails. Here is a full step by step walk through of how to Customize Your Email Signature .



Add a contact record

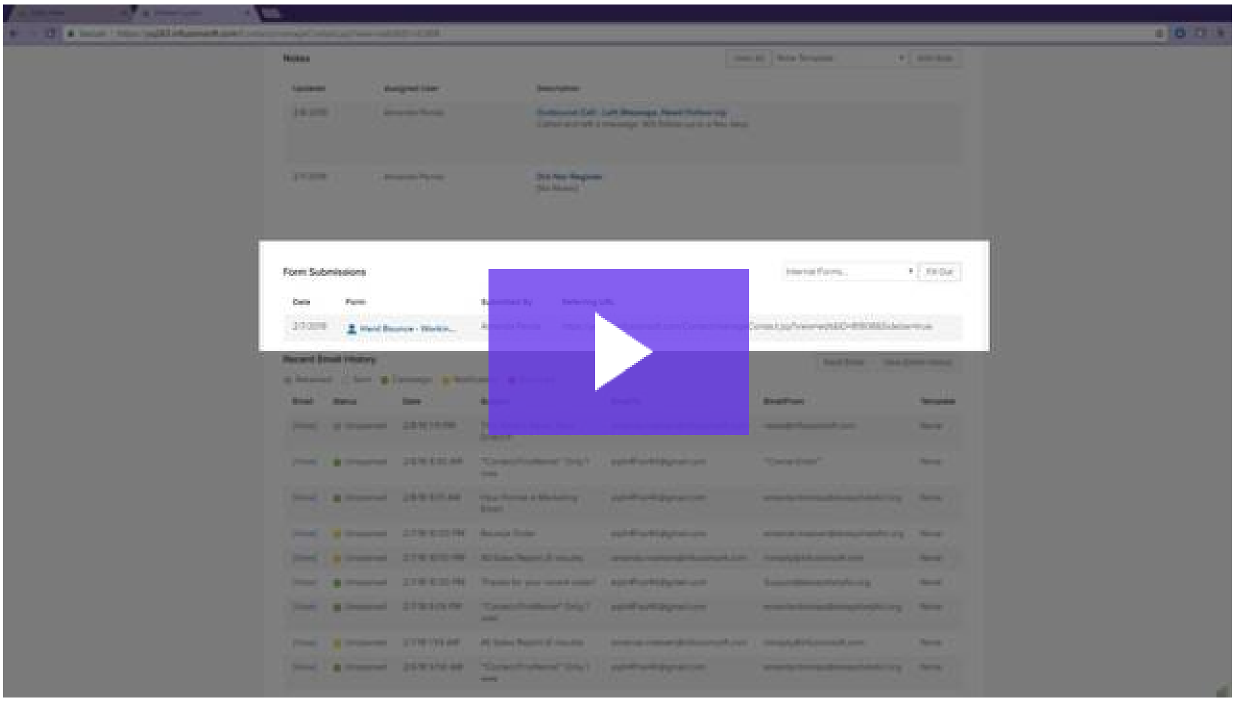
There are numerous ways to add a contact record in Infusionsoft. The simplest way is to Just click the + button at the top right of the page to add a new contact manually.



A few other ways to add contacts to Infusionsoft:

- (Manual) Importing contacts
- (Manual) Custom Internal Forms
- (Automatic) When a contact submits an online web form or Landing Page
- (Automatic) When a contact buys something from an Order Form or Shopping Cart

Contact Record Overview

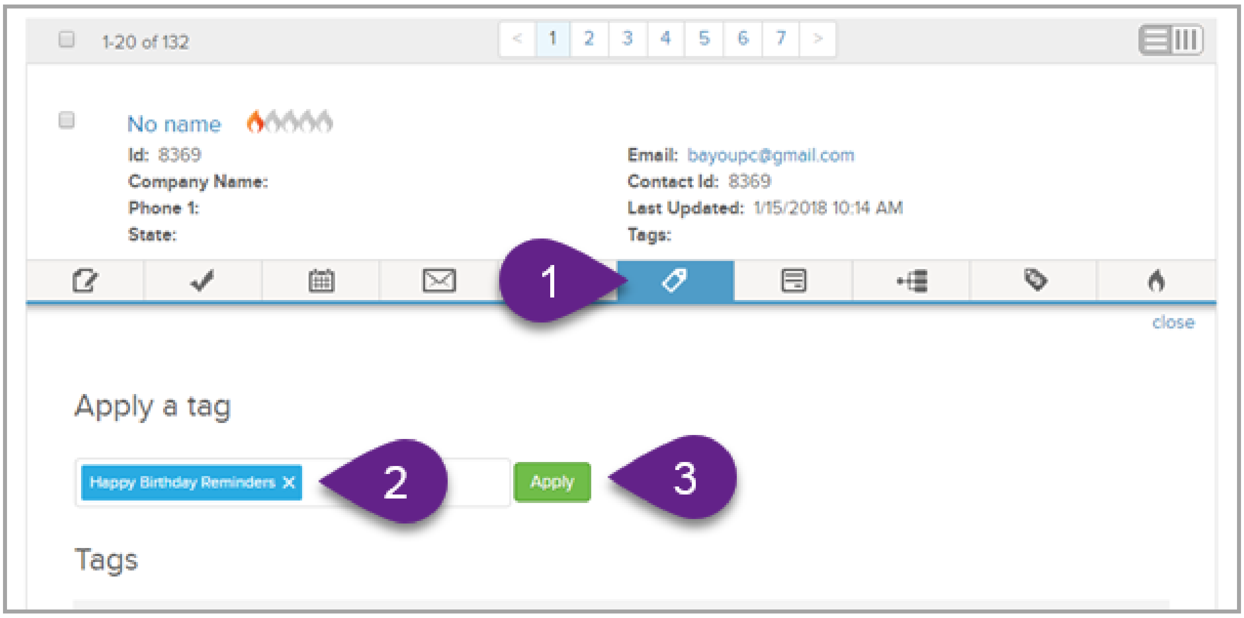


Segmenting Your Contacts

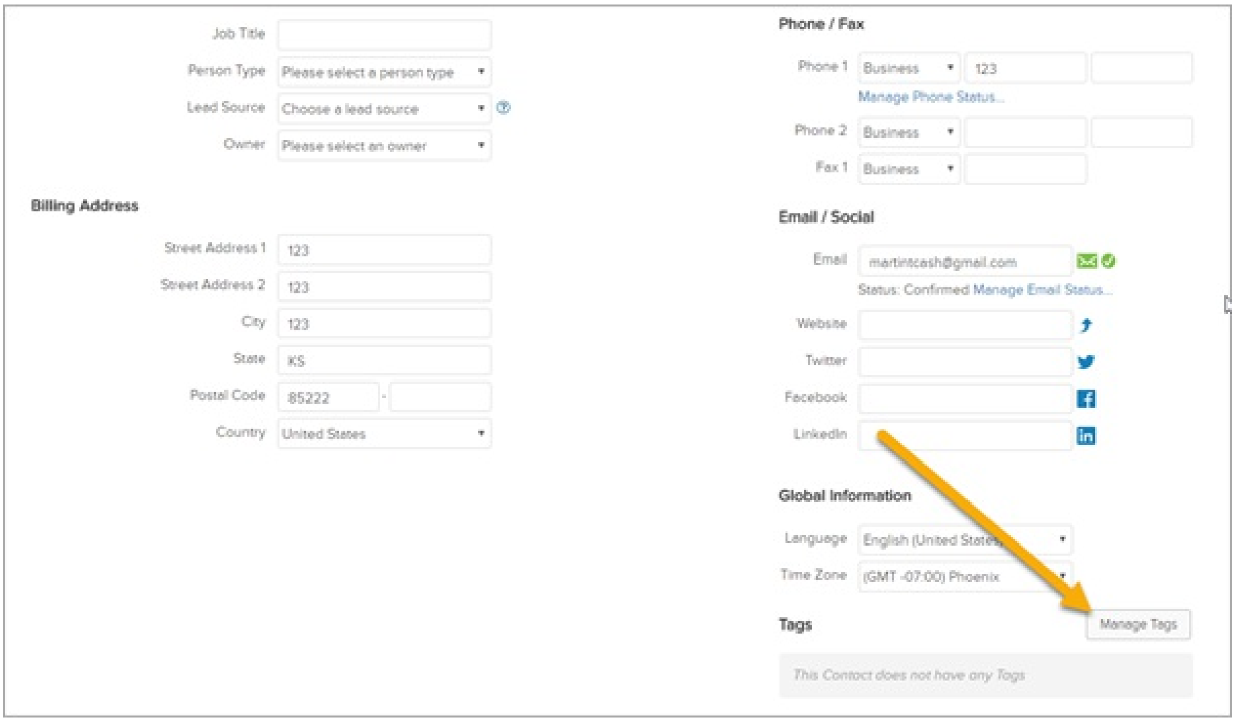
You can organize your contacts by creating tags and applying them to contact records. This allows you to search contacts by a tag or tags. Many times, you'll be creating tags on-the-fly as you are setting up campaign builder automation. You can also simply go to **CRM > Settings** to set up tags and tag categories .

There are two ways to manually apply a tag to a contact record:

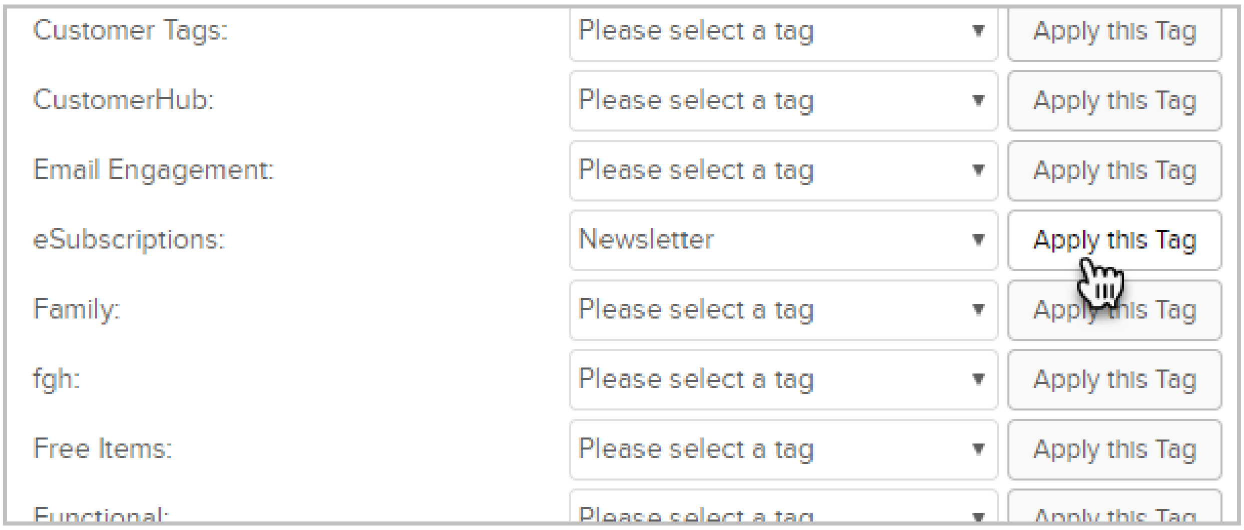
From the search results page, find the contact, click the**Tags** button, enter the name of the tag and click **Apply**.



You can also add a tag after opening the contact record. On the right side of the page, under their email address and social info is a **Tags** section.

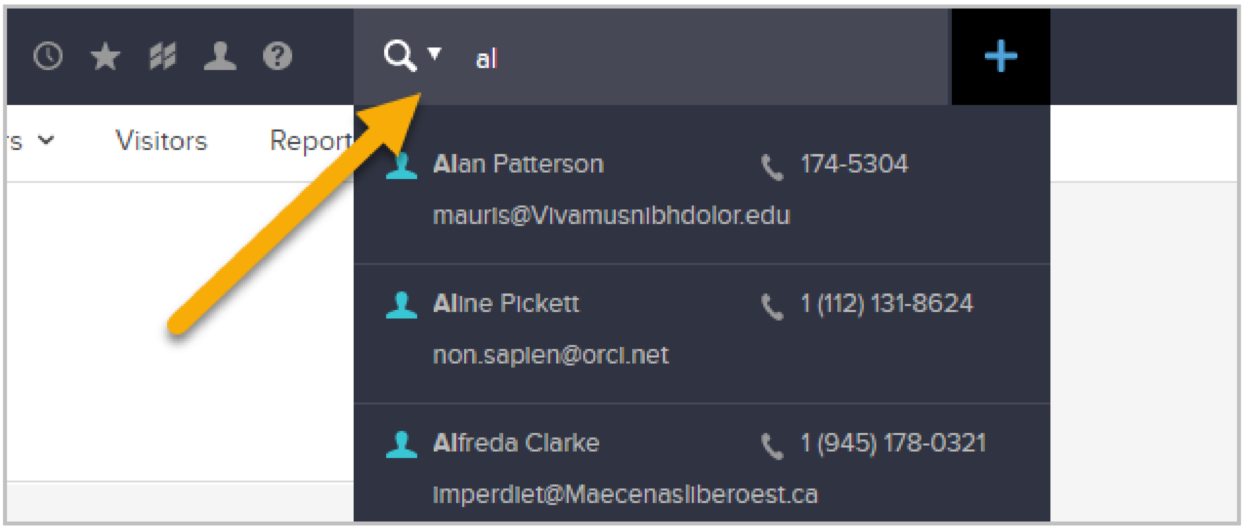


You may have several tag categories on the left side of the page. Choose the name of the tag from the appropriate drop-down box and click the **Apply this Tag** button.



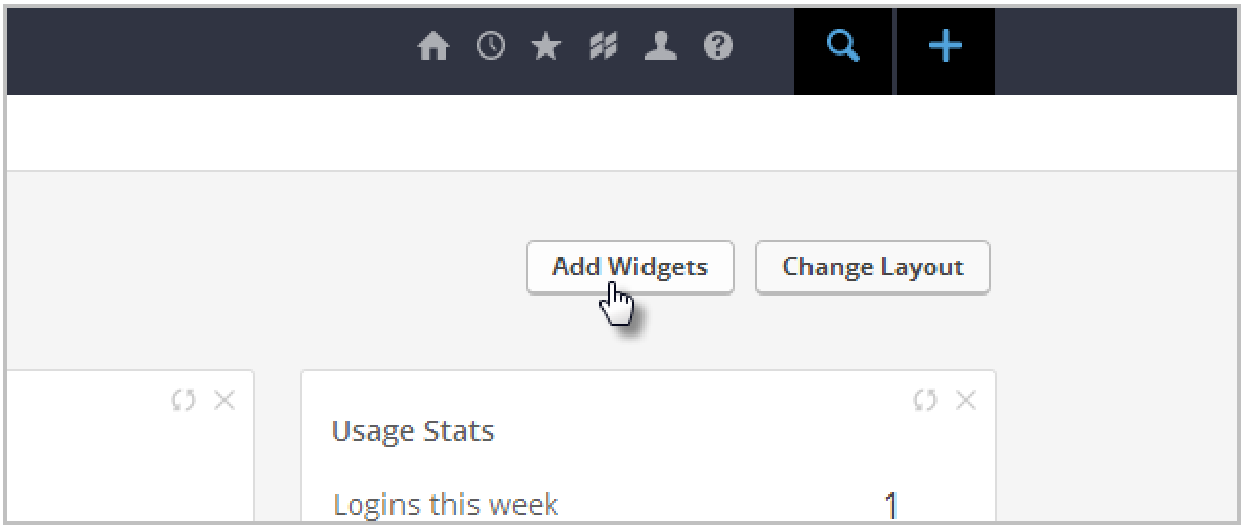
Searching Contacts

There are two ways to find a contact record in Infusionsoft. The most common way is to use the quick search bar at the top right. If you want to perform a more in-depth search (like searching by tags), you'll need to perform an Advanced Search .



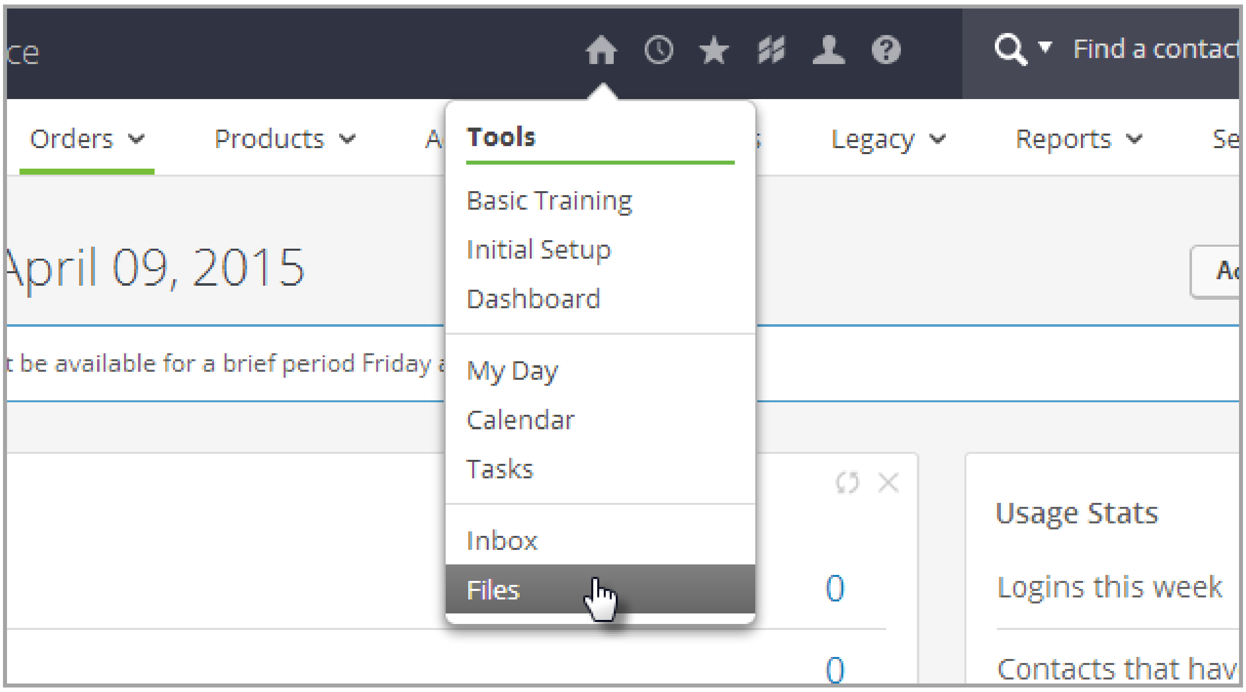
Customize your Home Page Dashboard

Learn how to personalize your home page Dashboard to show reports and information relevant to you.



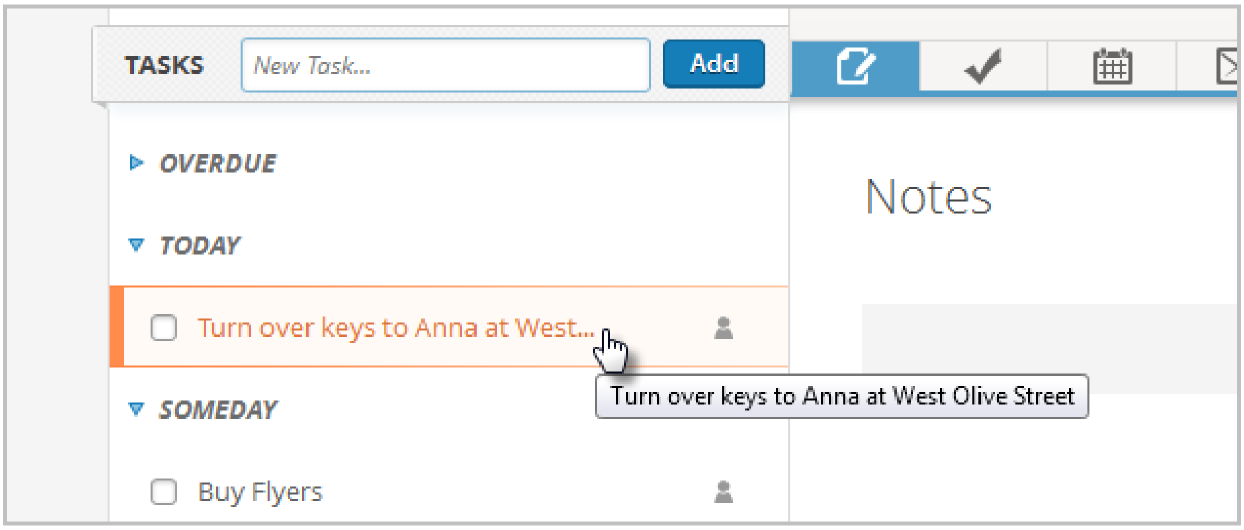
Store files in Infusionsoft

Learn how to upload and store files for all users on your account and how to upload files to a specific contact record .



Manage Your Tasks and Appointments with My Day

Learn how to use My Day to effortlessly manage tasks and appointments in Infusionsoft.



Infusionsoft Mobile, Outlook Sync, and Gmail Sync

You can perform certain tasks in Infusionsoft using your mobile device. Download the free Infusionsoft Mobile app to your iOS or Android device. You can also download and install our plugins for Microsoft Outlook and Google Gmail .

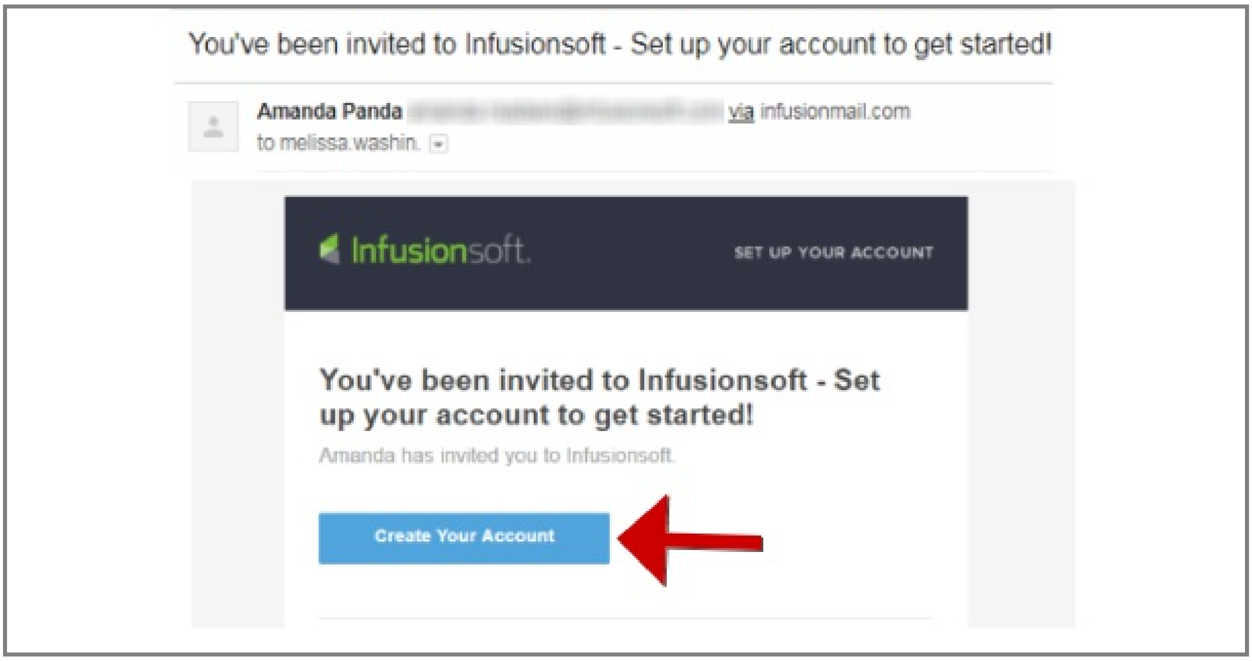
Using a different version of Infusionsoft? Click Here to learn more

Sign in to Infusionsoft

Last Modified on 09/28/2018 11:53 am MST

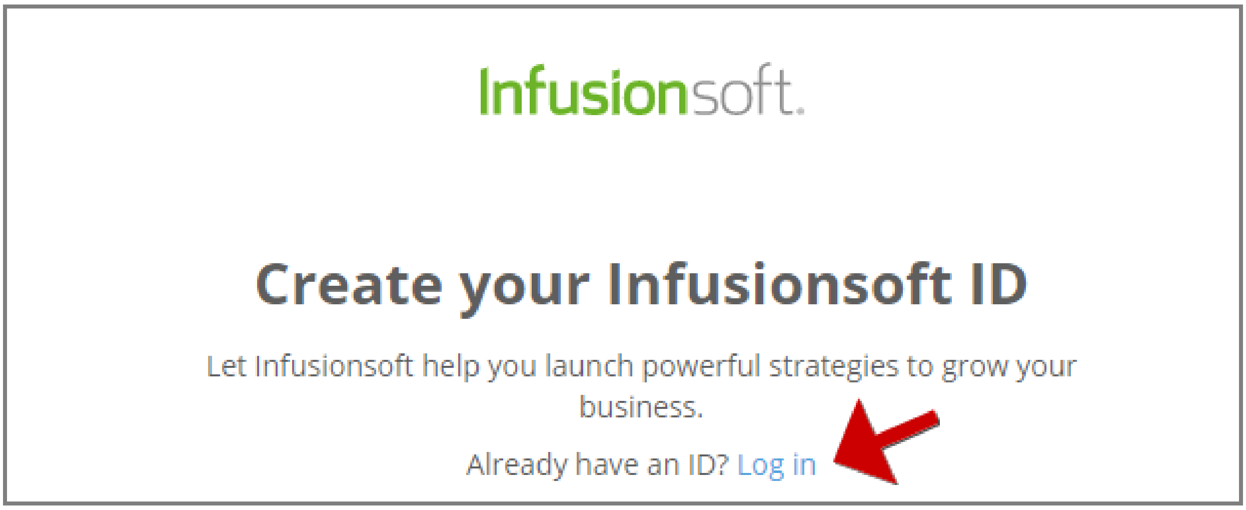
Create your Infusionsoft ID

1. If you have been invited to an Infusionsoft account, you will receive an email with a link to the Infusionsoft ID set up page. Click the link in the email to begin the process.



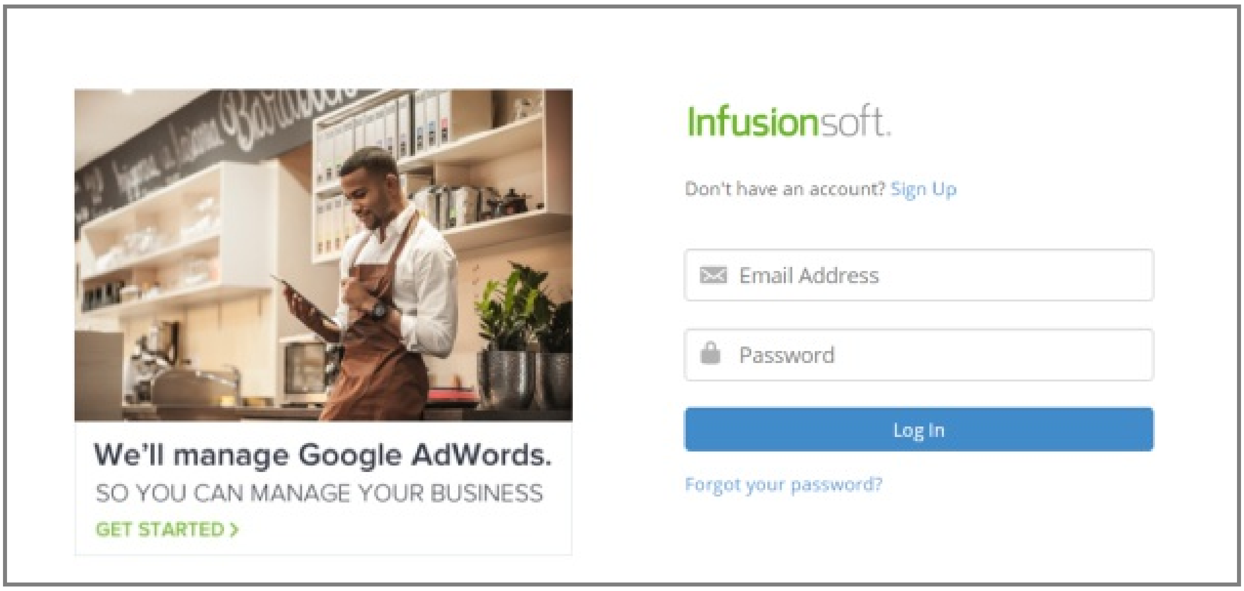
2. Fill out the form to create your Infusionsoft ID.

- If you already have an Infusionsoft ID, you can use it on multiple accounts! Instead of filling out the form, just click the Already Have an ID? link at the bottom of the form.



Sign in to your Infusionsoft Account

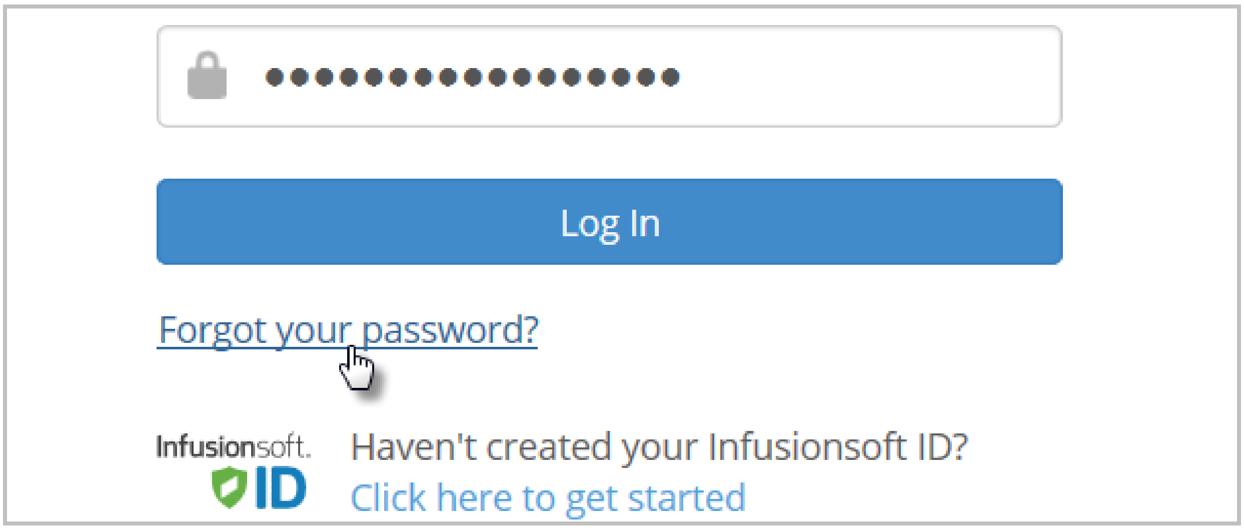
1. After setting up your Infusionsoft ID, go to **signin.infusionsoft.com** to enter your credentials.



Forgot Your Password?

2. If you forget your password, click the **Forgot your password?** link below the Log In

button.


Log In
Forgot your password?
Infusionsoft.
ID
Haven't created your Infusionsoft ID?
Click here to get started

Using a different version of Infusionsoft? Click Here to learn more

System Requirements

Last Modified on 09/28/2018 11:53 am MST

Supported browsers for using your Infusionsoft application

Infusionsoft is a web-based application. You don’t need to download or install software on your computer to access Infusionsoft. Since you’ll be accessing Infusionsoft using a web browser, let’s review the options that will ensure you’re set up to use Infusionsoft successfully.

Important Note! Accessing Infusionsoft via a mobile device (Android, Iphone, Ipad) is not supported. While some users have had success logging in, this is not recommended, as Infusionsoft is designed to run on Chrome or Firefox, on a PC or Mac.

- Google Chrome
- Mozilla Firefox

Supported browsers for your customers

(e.g., for accessing shopping cart, forms, An Infusionsoft-hosted web page used to capture information about a prospect and landing pages)

- Google Chrome (including Android)
- Mozilla Firefox (including Android)
- Safari (including iOS)
- Microsoft Internet Explorer 11
- Microsoft Edge

FAQs

What do you mean by “supported”?
What does it mean if a browser is not supported?

What versions of the supported browsers may I use?
Why does Infusionsoft support different browsers for your users vs. users' customers?

What do you mean by "supported"?

When a browser is supported, this means that the software has been designed to work in that browser and that it is routinely tested to ensure it works as designed. If users encounter bugs/issues when using a supported browser, these will be prioritized for correction by our development teams.

What does it mean if a browser is not supported?

A browser that is not listed as 'supported' is not tested by our quality engineers and may or may not work with our software. We recommend using a supported browser when logging into your Infusionsoft application.

What versions of the supported browsers may I use?

Modern browsers are typically designed to continually update as new security standards and features become available. Make sure you use the most recent stable release version of your preferred, supported browser and rest easy that it will be supported by Infusionsoft. We cannot promise full support for beta or developer browser versions.

Why does Infusionsoft support different browsers for your users vs. users' customers?

Your business runs on Infusionsoft. We understand how critical it is that you connect with your customers, whether you're sending them an email, taking them to custom landing pages, or processing orders; we also understand that you can't control what technology your customers use when they connect with you. That's why we dedicate development resources to ensuring that, whatever browser or device your customers may use, they're getting the best experience possible so your business can look its best.

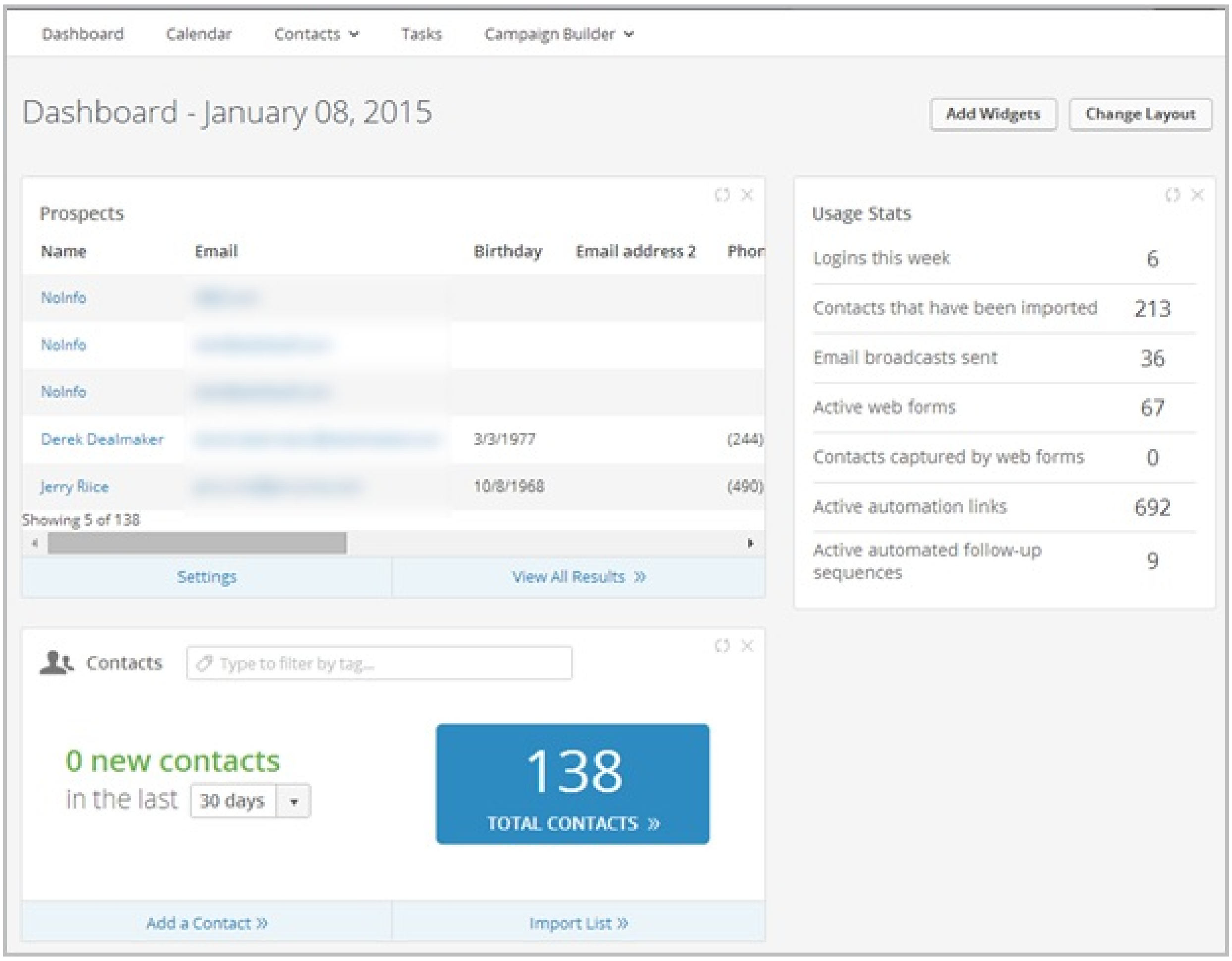
Using a different version of Infusionsoft? Click Here to learn more

Learn How To Navigate Infusionsoft

Last Modified on 09/28/2018 11:54 am MST

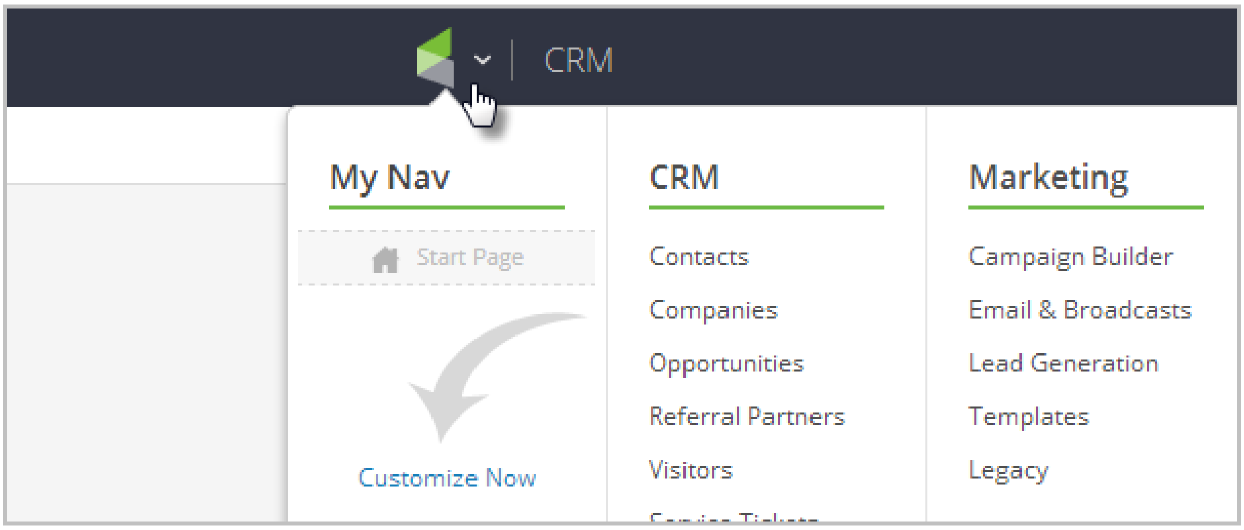
Dashboard

When you sign into Infusionsoft, you will see your home page dashboard. You can add reports and activity widgets to create a custom dashboard. The home page dashboard should display the information you need and provide direct navigation links to specific role-related lists and reports.



Main Navigation Menu

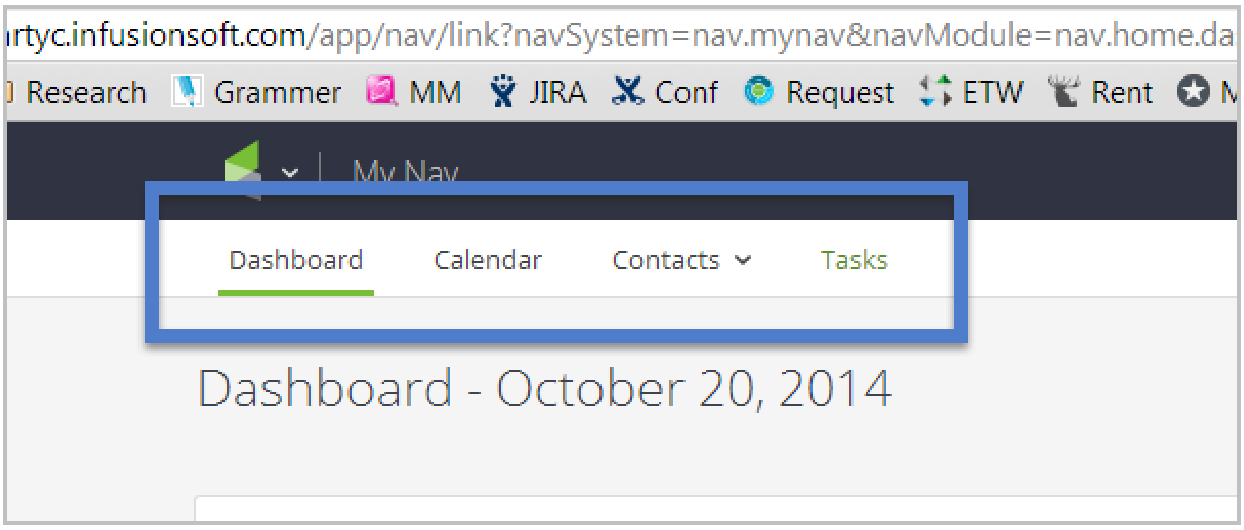
When you hover over the Infusionsoft logo, the main navigation menu is displayed. The main navigation menu is comprised of several columns to help you find something fast. Although most people spend their time in a specific area (e.g. Marketing), the main nav allows you to jump to another area quickly.



Pro-Tip! What columns are displayed is restricted by permissions and what Infusionsoft edition you have.

Area Nav

Each system area (CRM, Marketing, E-Commerce, and Admin) has a matching area nav with additional drop-down menu options. The area nav allows you to perform multiple tasks (or work the whole day) in the same area of the system.



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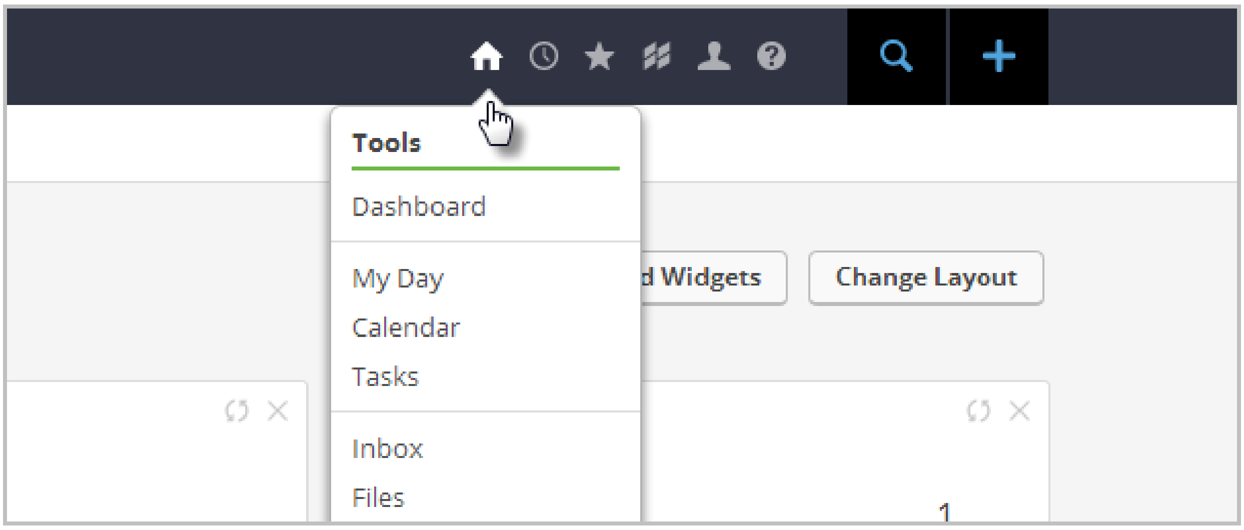
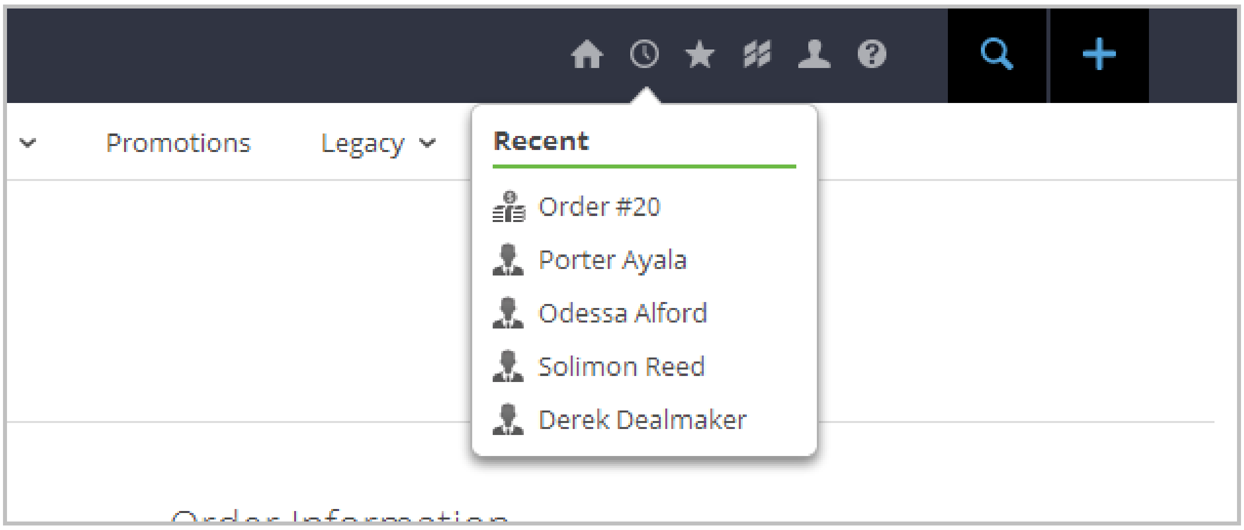
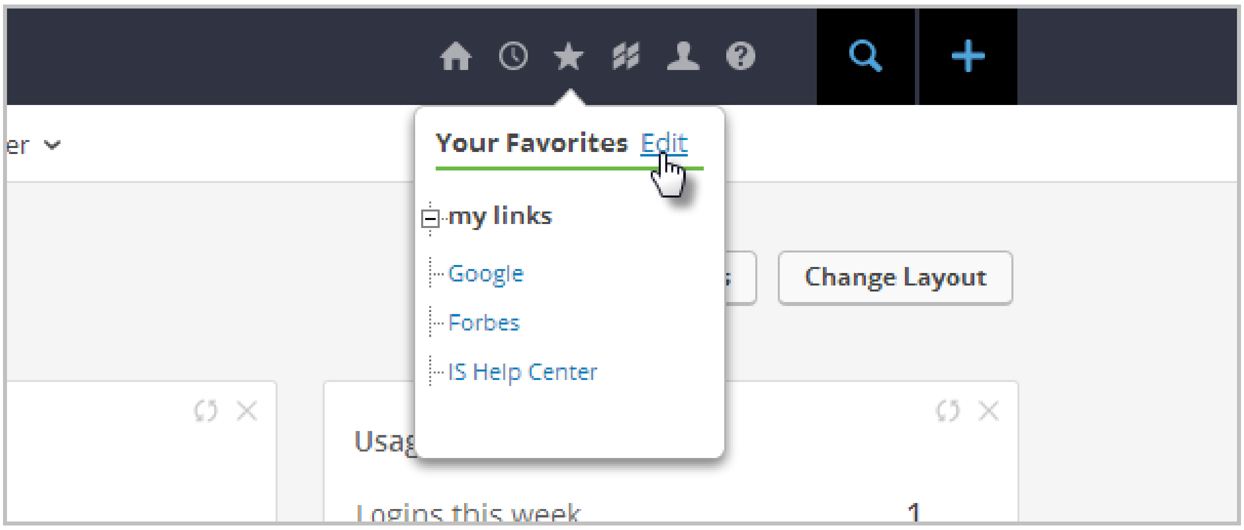


- **Recently Viewed** - This displays a list of the last few pages a user has viewed. It provides a quick way to navigate back to one of them.



- **My Favorites** - This menu is customizable. Click on Edit to add a link. This is a great way to add links to external websites you frequent throughout the day (e.g. company blog, facebook, or twitter.)



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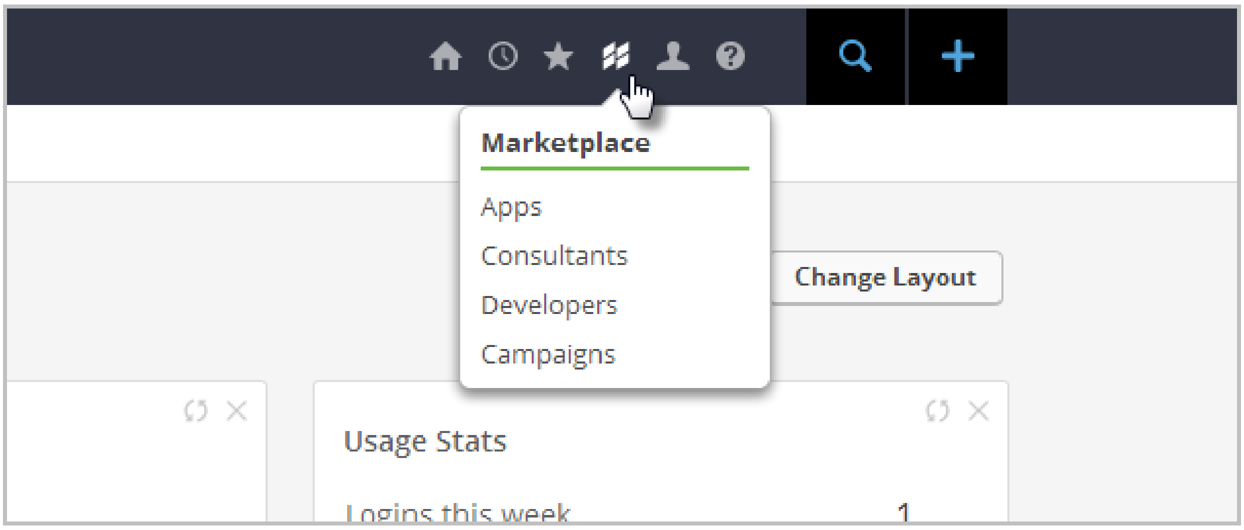
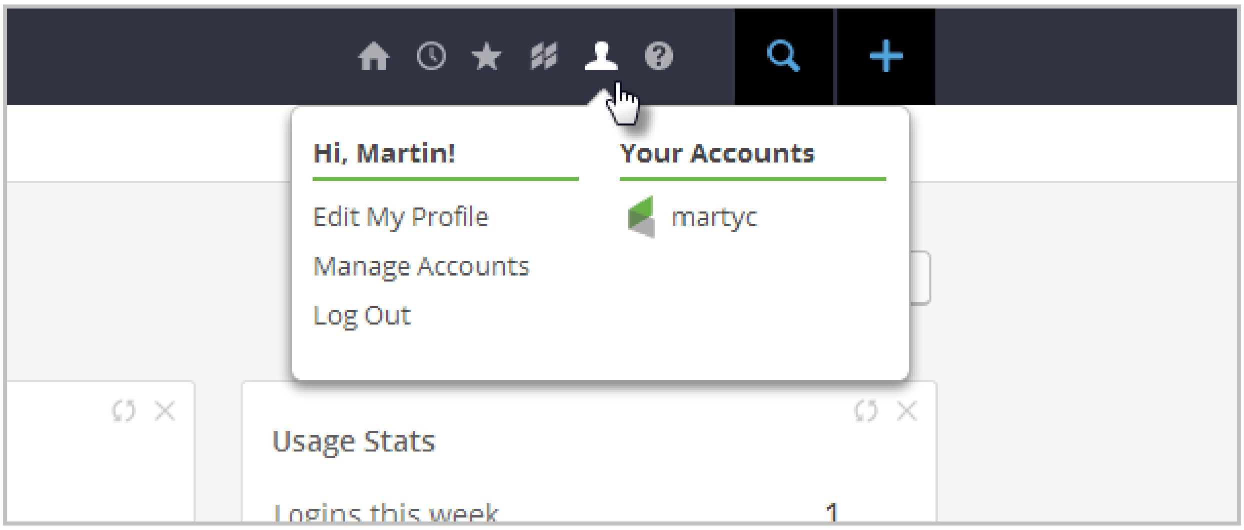


- **My Profile** - This menu gives you access to customize you profile, preferences, and email signature.



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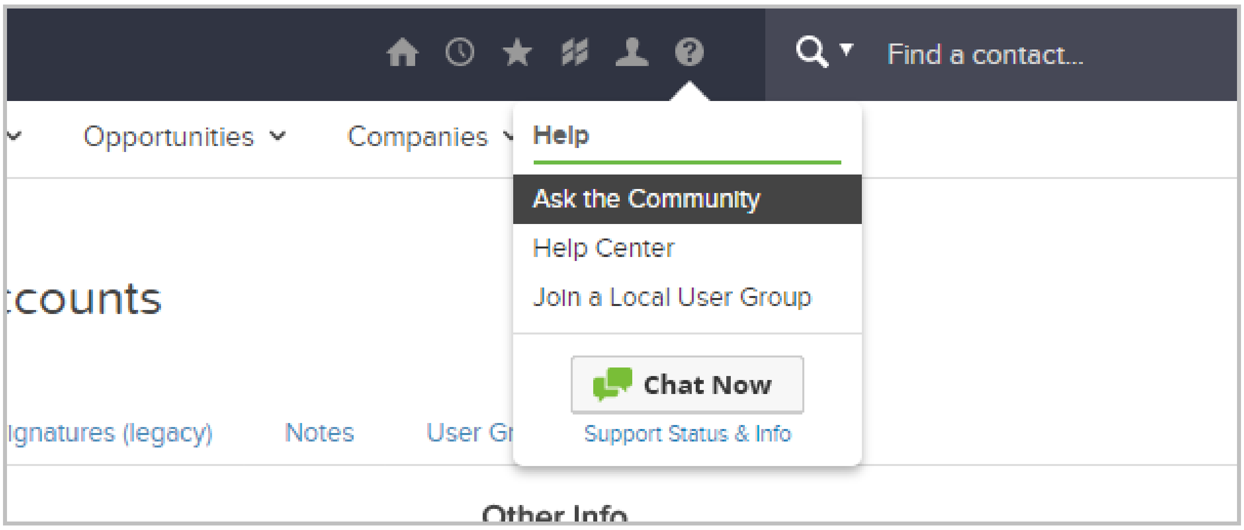
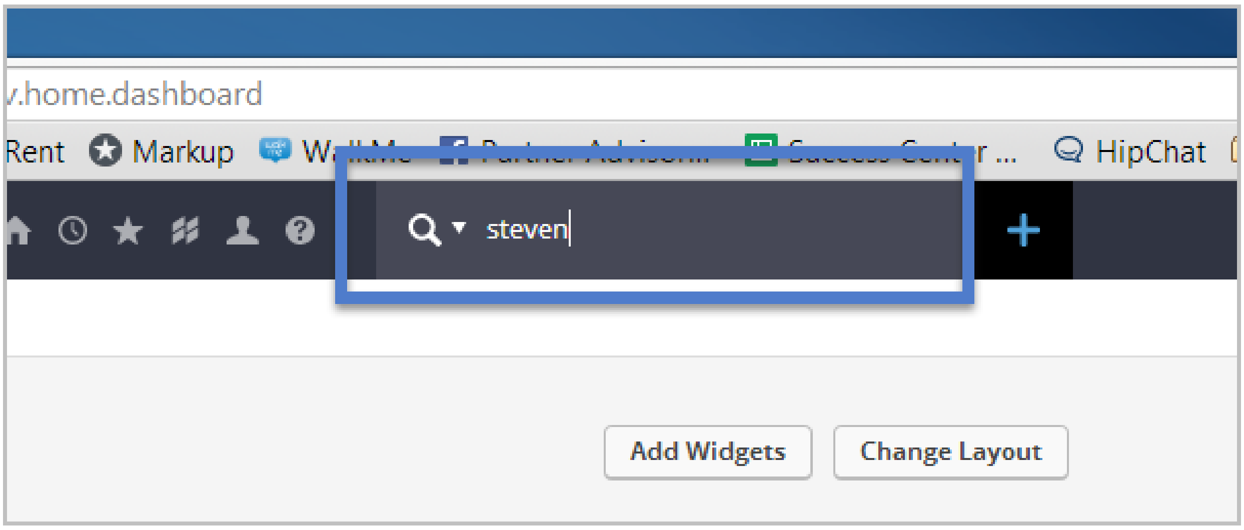
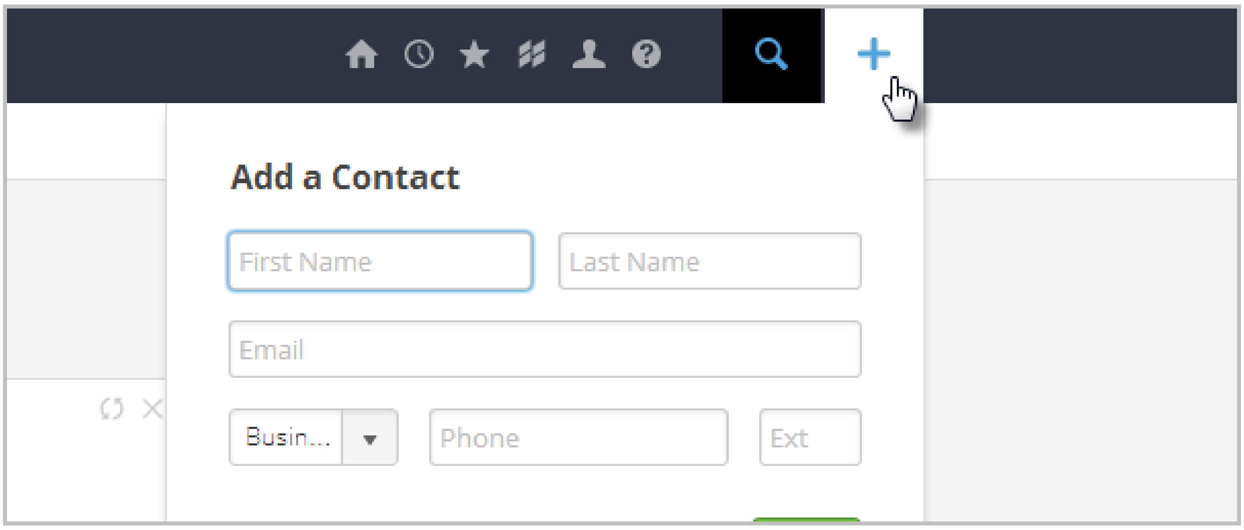


- **Search** - From this area, you can search for a specific record by name or ID number. Use the drop-down to select a different item to search for.



- **Contact Quick-Add** - Quickly add new contacts to Infusionsoft.



Using a different version of Infusionsoft? Click Here to learn more

Customize The Home Page Dashboard

Last Modified on 09/28/2018 12:05 pm MST

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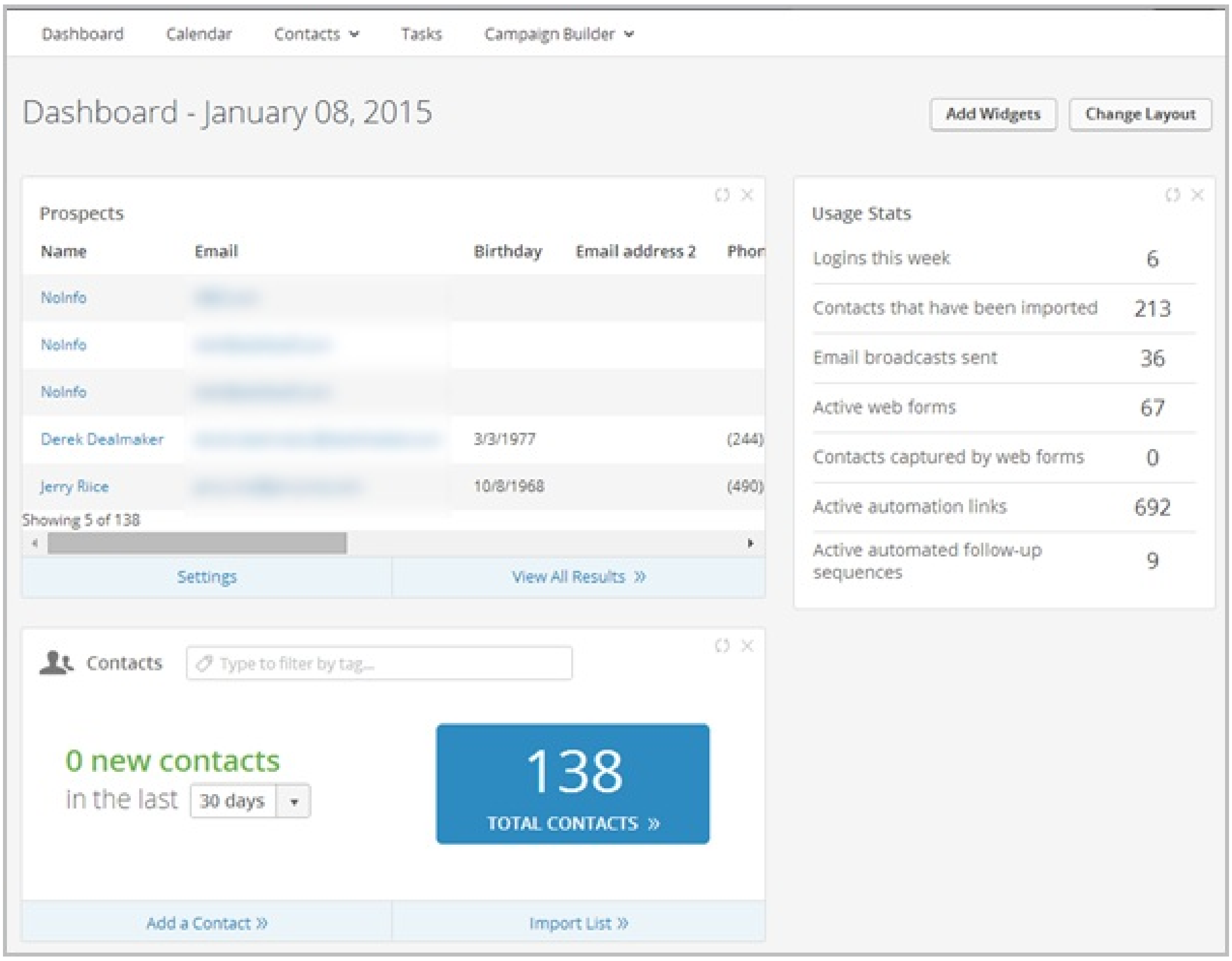

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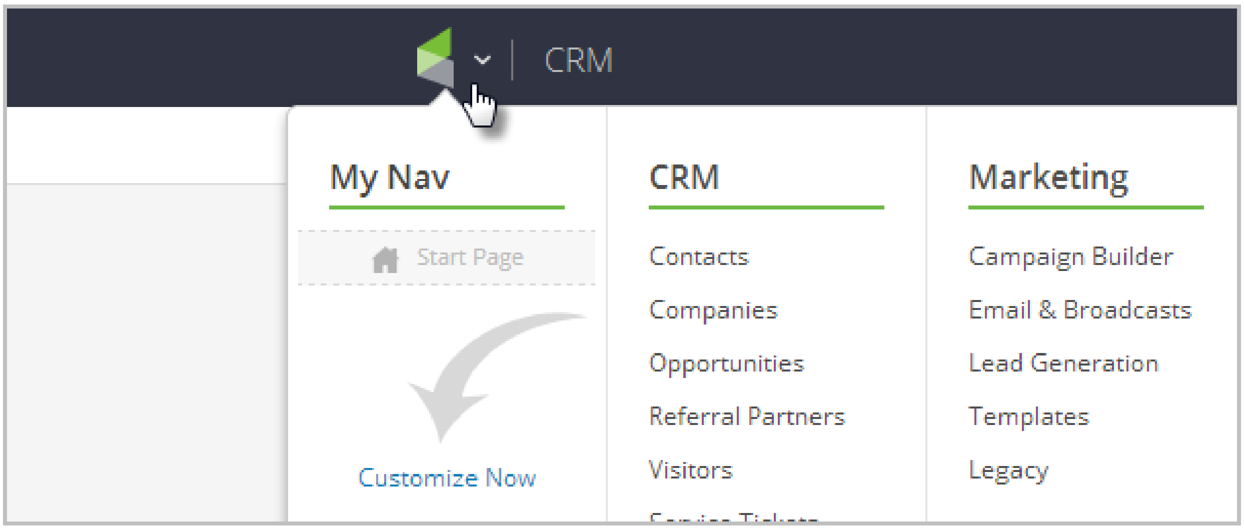

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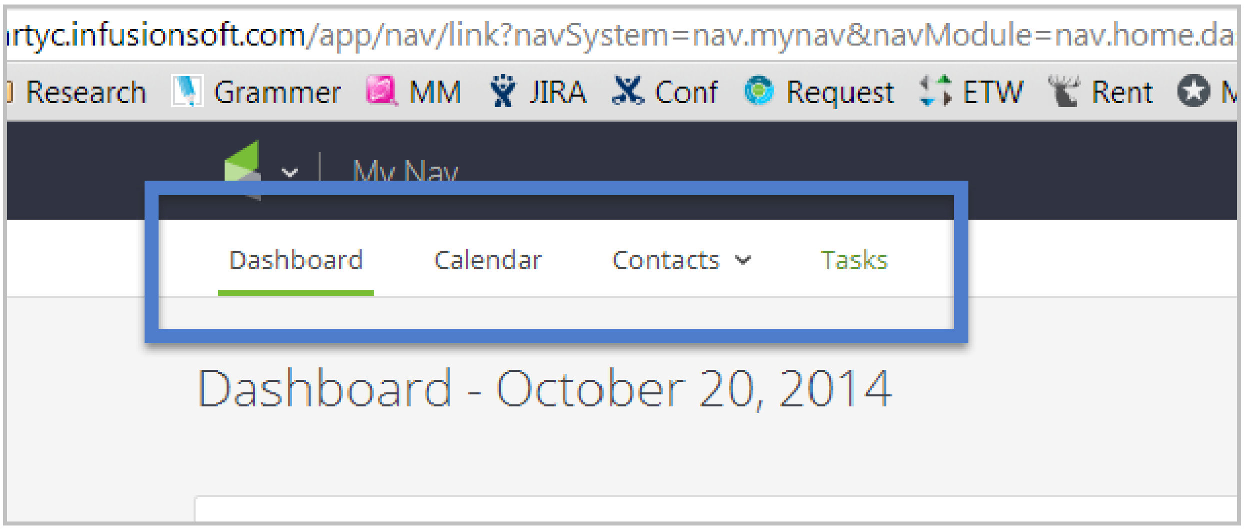
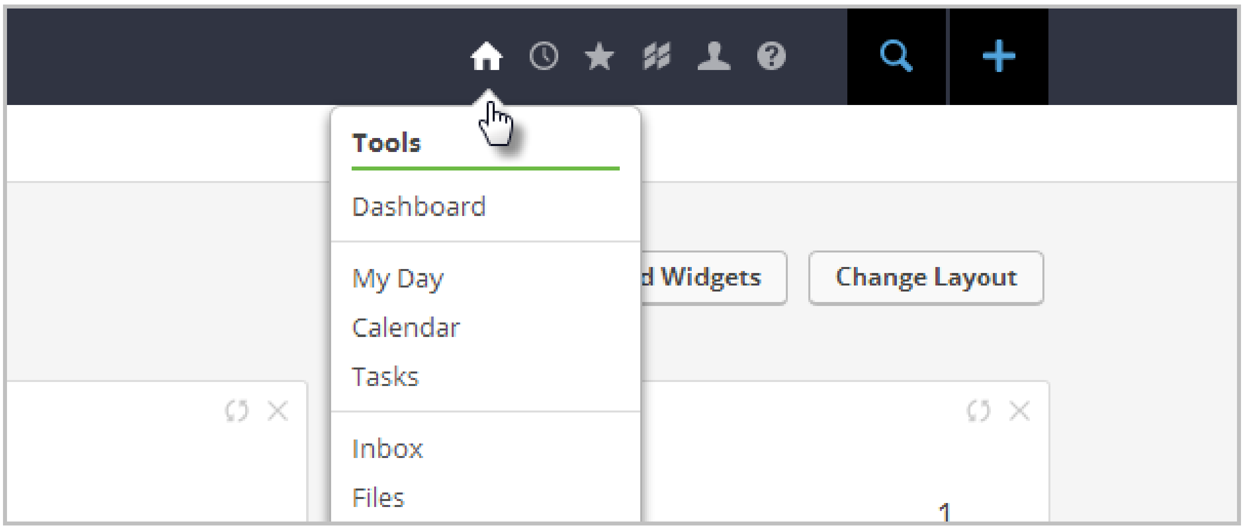
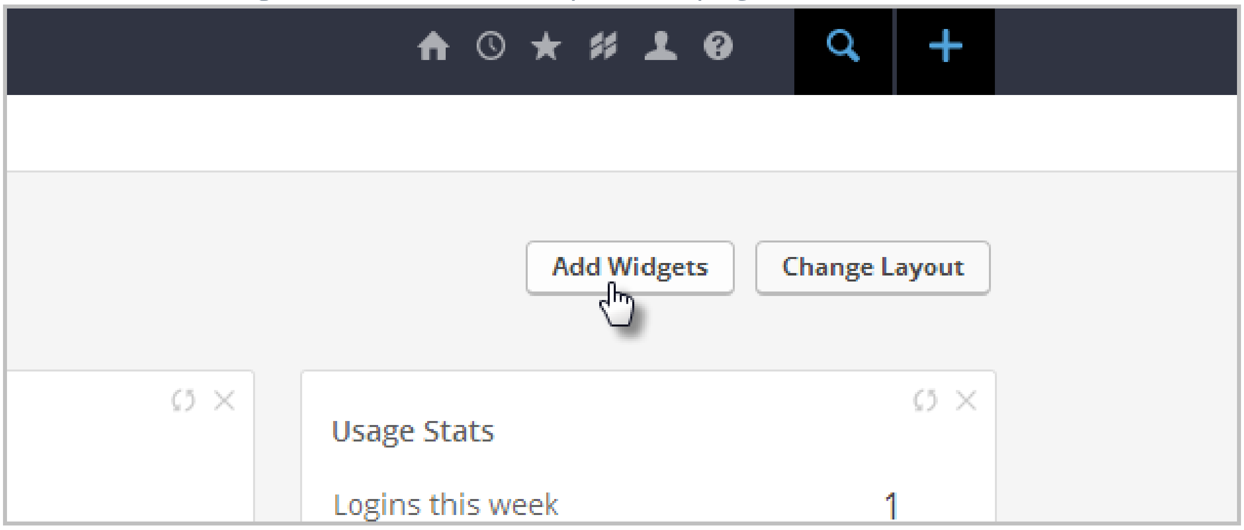


To Add a New Widget

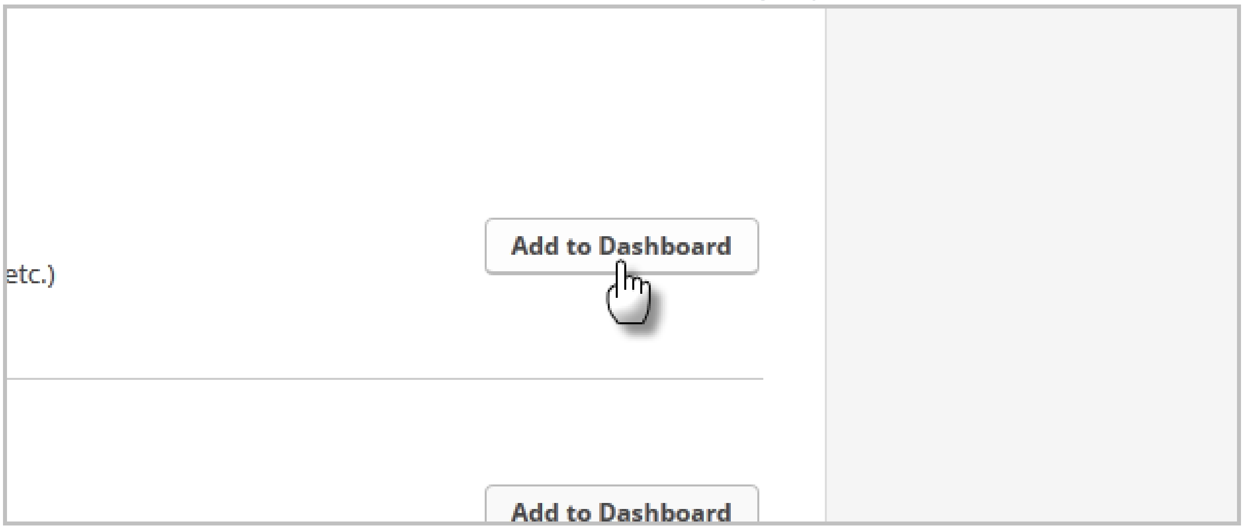
1. Go to the home page dashboard by clicking the**Home** button or by clicking the **Dashboard** link.



2. Click the **Add Widgets** button at the top of the page.



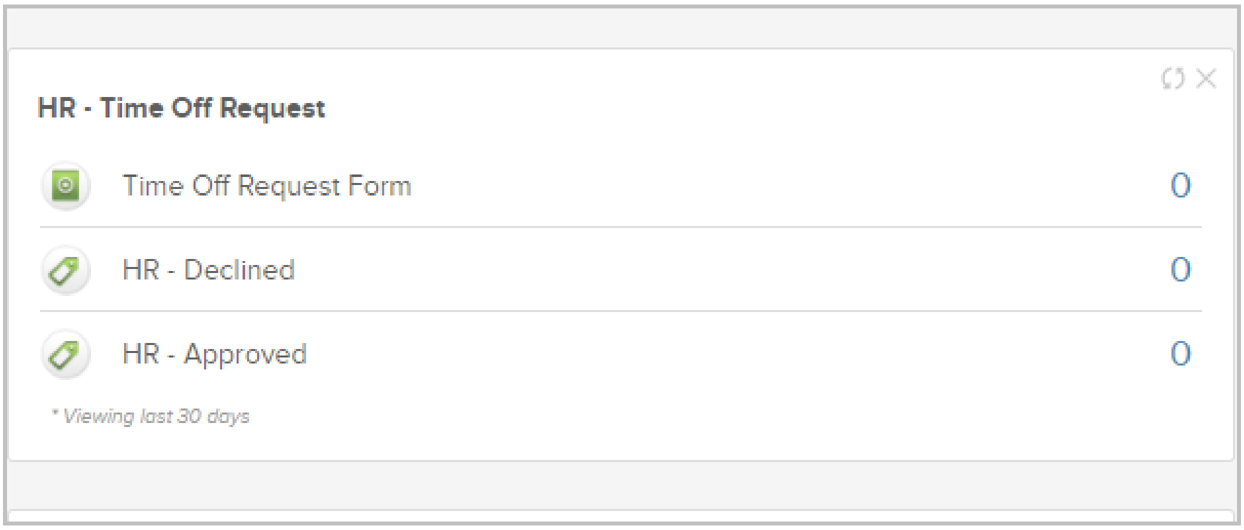
3. Click the **Add to Dashboard** button next to the widget you want to use.



List of Available Dashboard Widgets

Campaign Reporting

This widget allows you to view high-level statistics on a campaign that you choose from a drop-down. In the example below, you can see how many contacts filled out the "Time Off Request Form" and how many times tags were applied. Please note that the campaign needs to be published in order to show up in the drop-down.



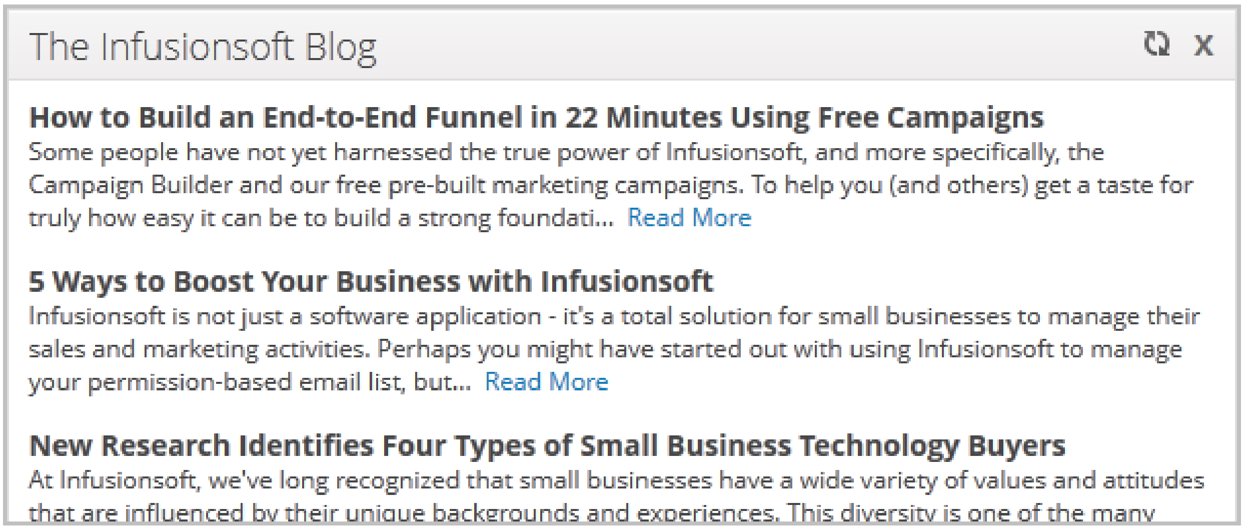
All Email Stats

This widget displays summary statistics for email activity.

RSS Feed

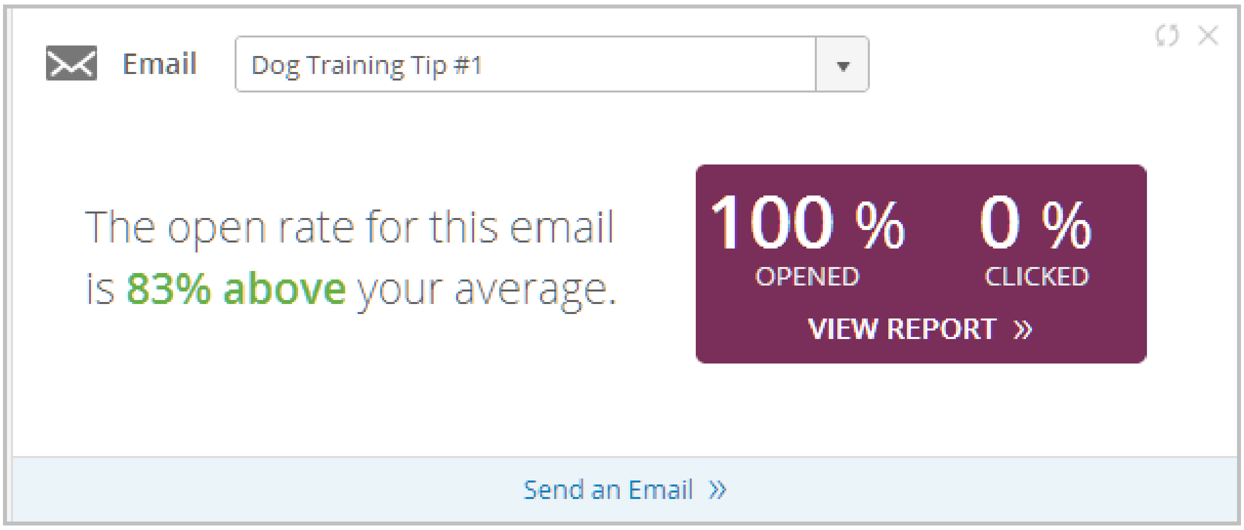
This widget allows you to add an RSS Feed to your home page. By default, it links to the

InfusionBlog, but you can Edit the RSS link to customize the feed. Add the widget more than once if you'd like to see multiple feeds. Click on Edit to change the feed URL.



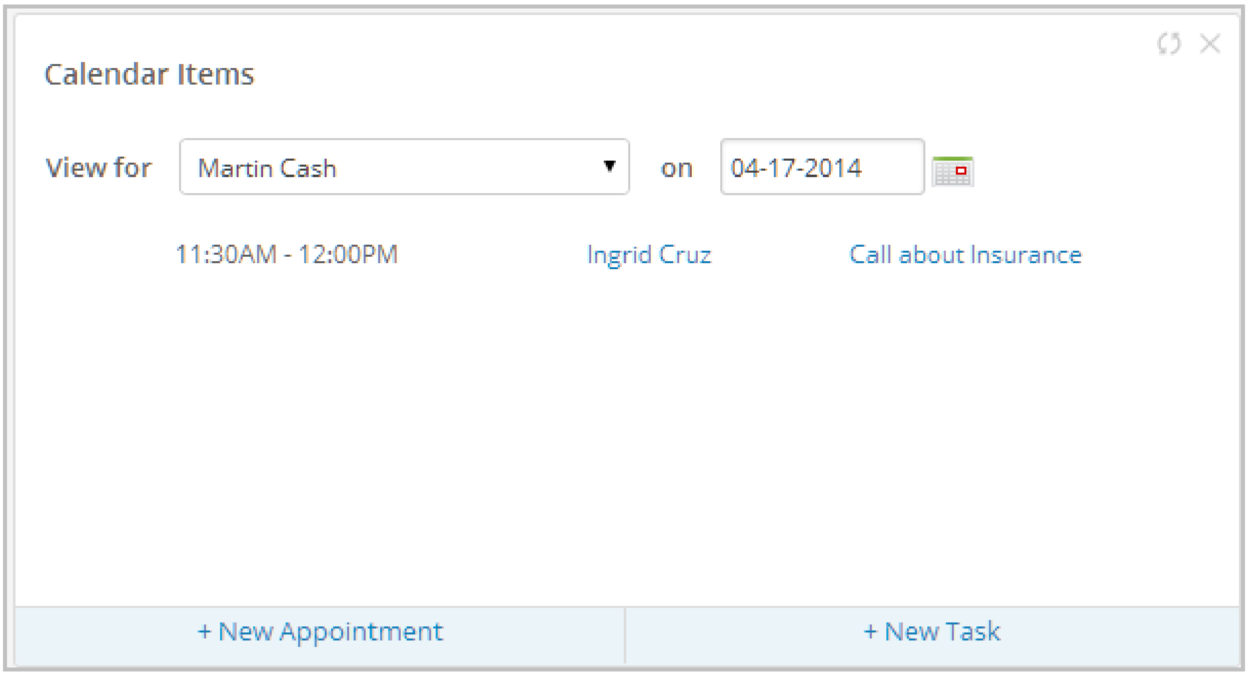
Email

The email widget is designed to help you send your first email broadcast. Once you have sent your first broadcast, the widget will "unlock" and present you with detailed reporting on the last 5 email broadcasts you have sent. Just select the broadcast from the drop-down at the top.



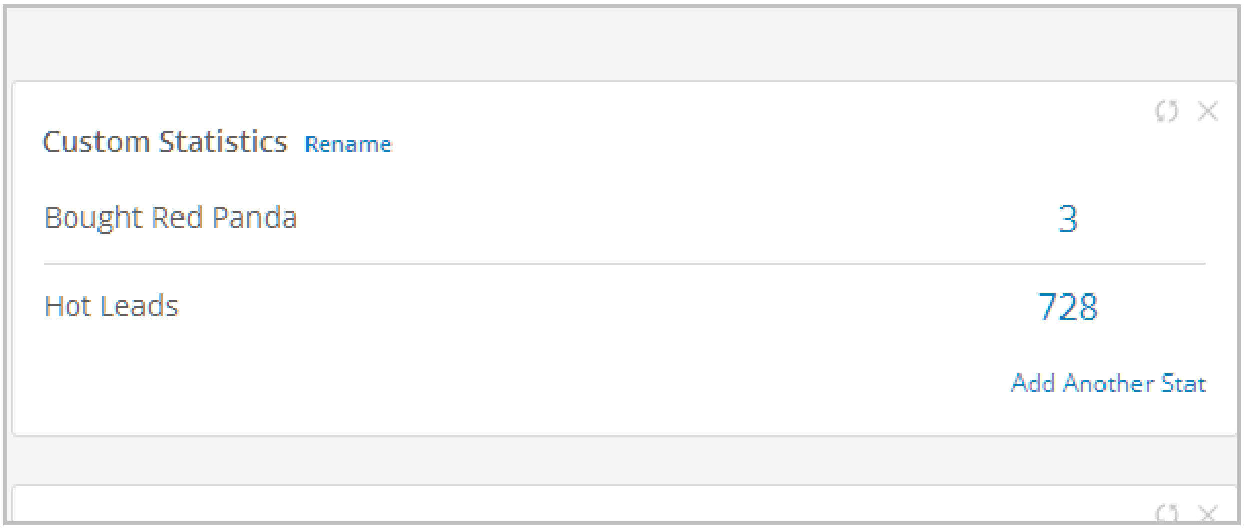
Calendar Items

This widget displays daily appointments and provides access to past and future appointments. If your user permissions allow, you can also view appointments assigned to other users.



Custom Statistics

This widget displays custom report summaries on your Home Page. Display the number of records in a particular list, the sum or average of a column on a report, and more. You must create a saved search before using this widget. This widget displays numerical summaries, but you can easily click through to view list or report details. Click on Rename to customize the box name. Click on Add another stat to add another stat to the widget.

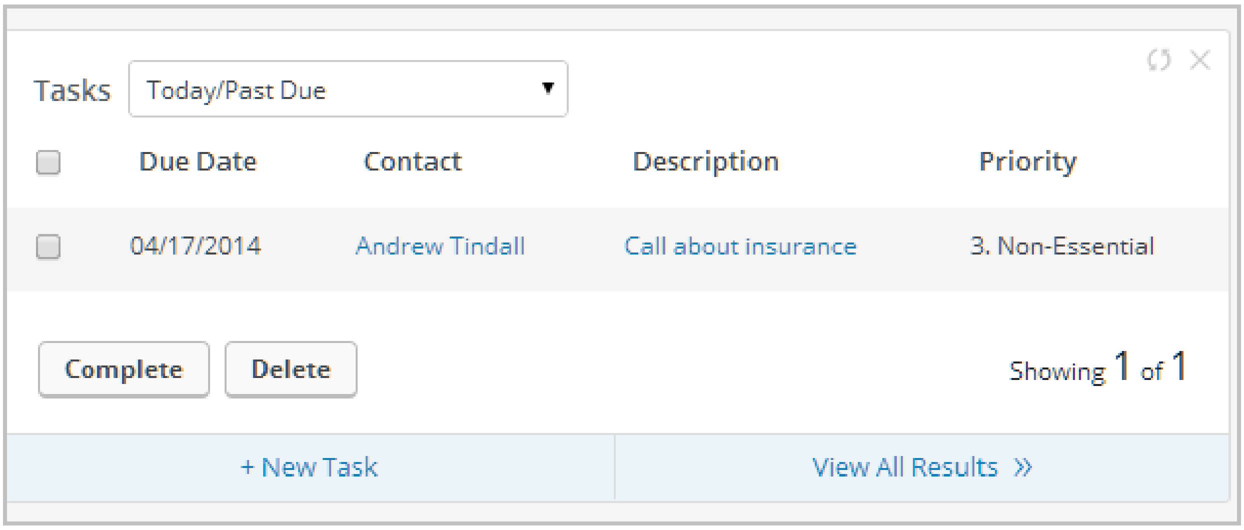


Pipeline Stages

Provides a count of how many contacts are currently in each of your sales stages. Full list views are available by clicking on each stage.

Tasks

Allows quick access your daily tasks directly from your dashboard.

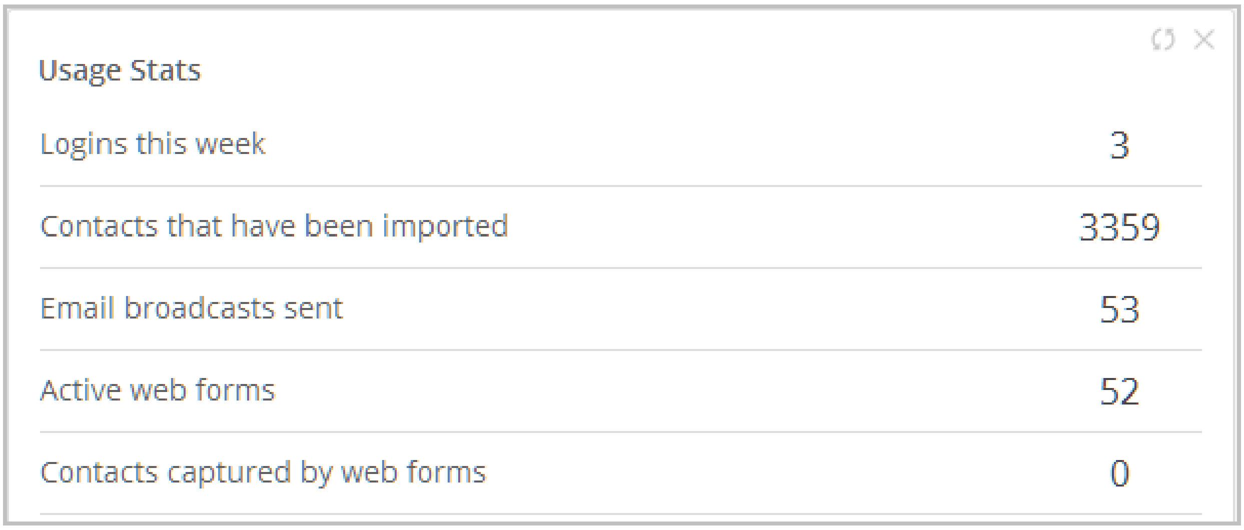


Saved Search or Saved Report

This widget displays the first 20 individual records on a particular list or report. You can click View all results to see the full list or report.

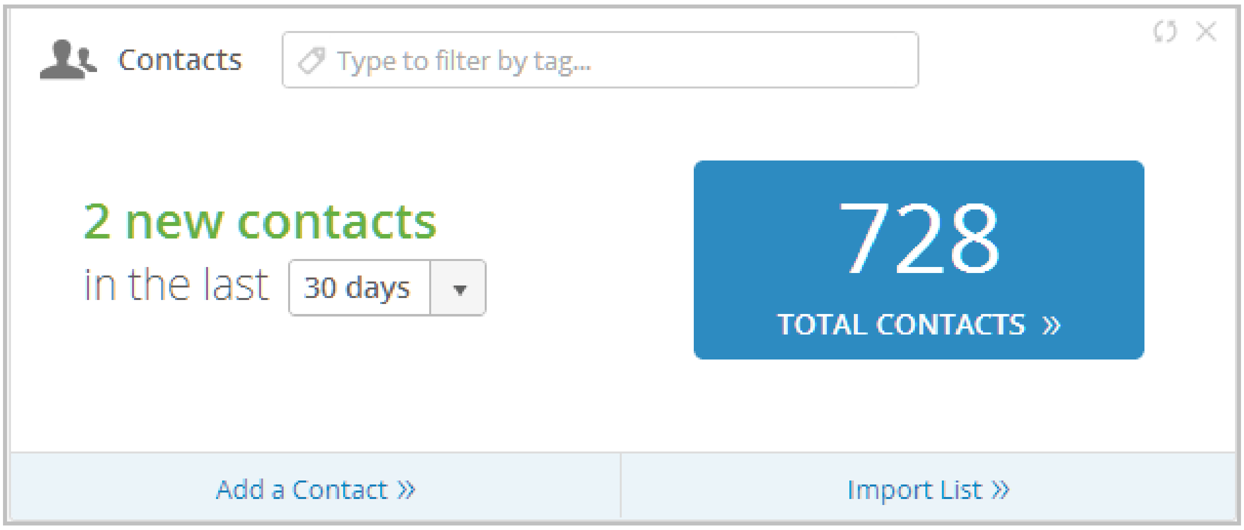
Usage Stats

This widget displays system activity so you can see the total number of user sign-ons, broadcasts, active web forms, and more.



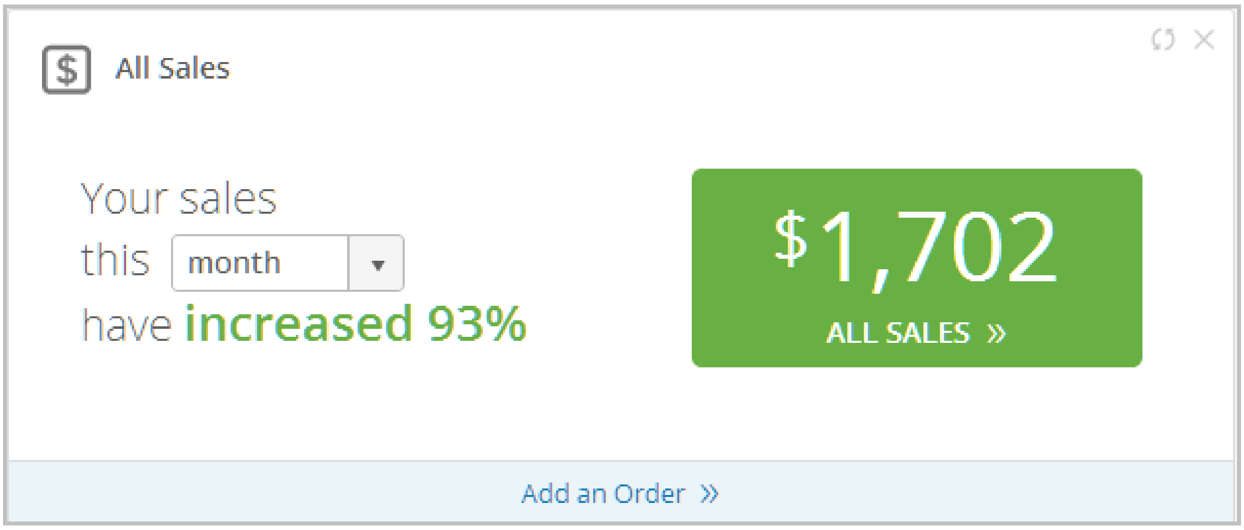
Contacts

The Contact widget is designed to help you add contacts and provide you insight into your list(s). If you haven't added contacts yet, the widget will be displayed on your dashboard by default. Once you add contacts, the widget will "unlock" and provide you with quick access to your contacts. You also have the option to swap out the default 'all contacts' numbers with a number from a specific tag. To filter by tag, just type the tag name at the top of the widget.



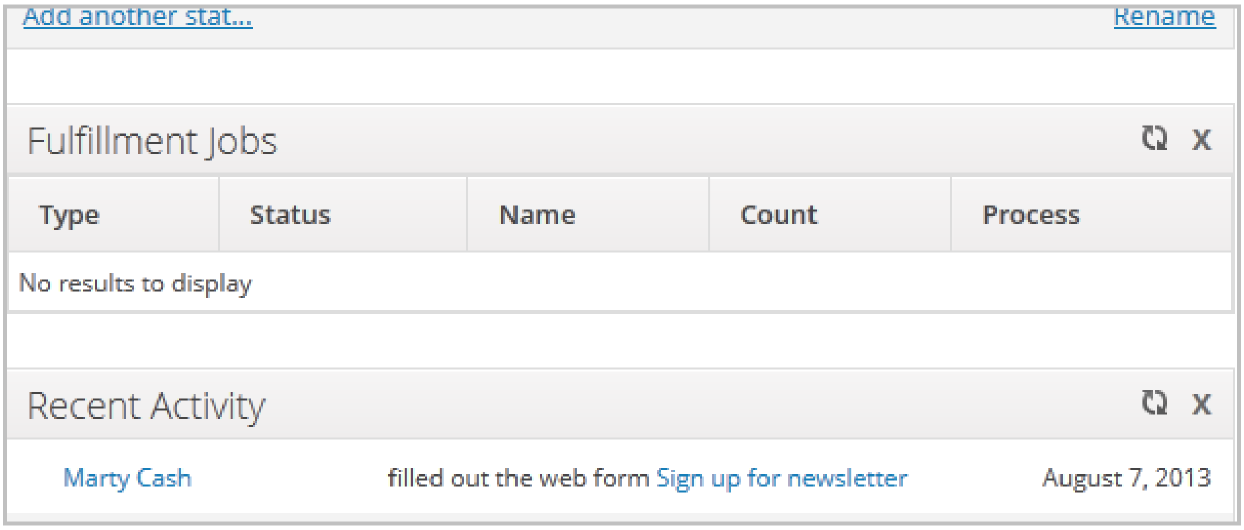
All Sales

The All Sales widget gives you a quick view of orders and sales made for the month, year, or quarter. Once an order is recorded, the widget will "unlock" and display dollar amount of sales, month-to-date. You can also place a manual order from this widget.



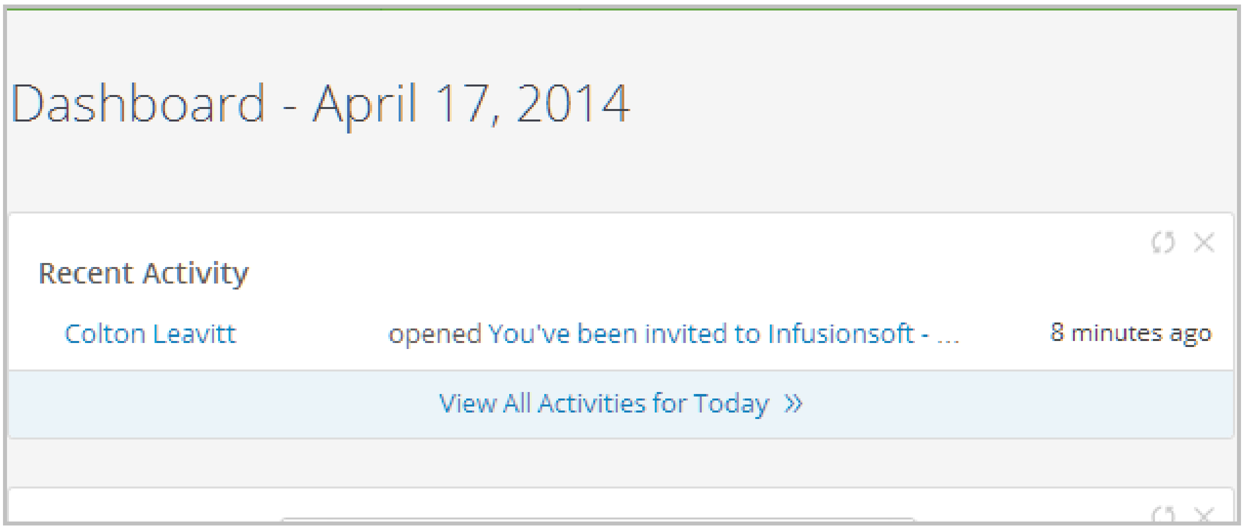
Fulfillment Jobs

This widget displays all of the fulfillment jobs assigned to you. Click on a link to access the job details and related documents (spreadsheets, labels, letters, etc.). Once viewed, the fulfillment jobs are put into "Processing" status until you mark them as complete.



Recent Activity

This widget displays a stream of activity, similar to popular social media streams. It will show you when someone fills out a web form, opens an email, clicks a link, and more. Activities are grouped on a per-person basis. Click on the arrow to expand the display to view all activities.



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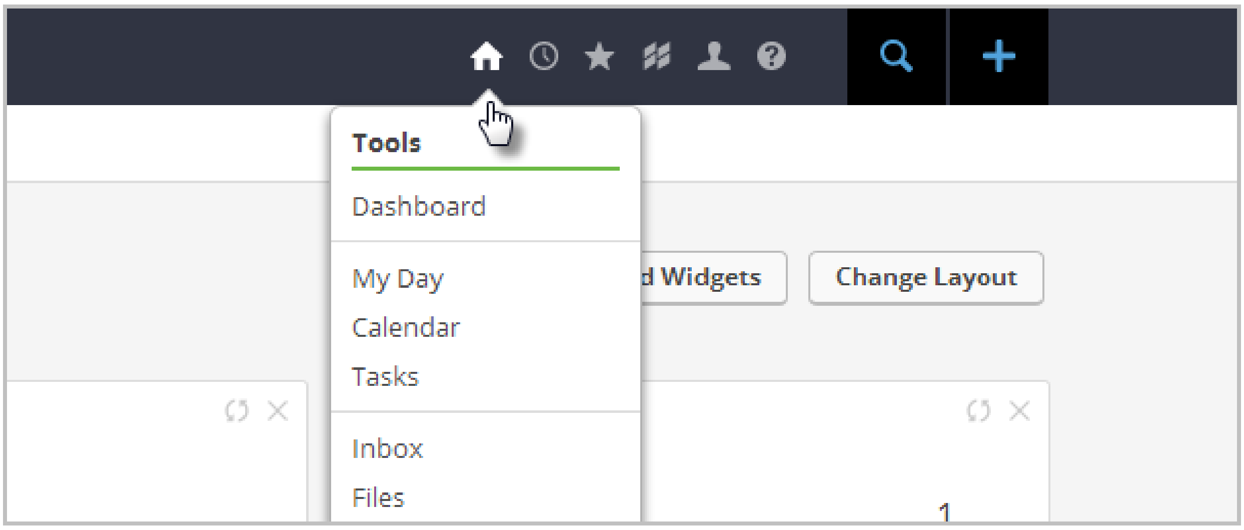

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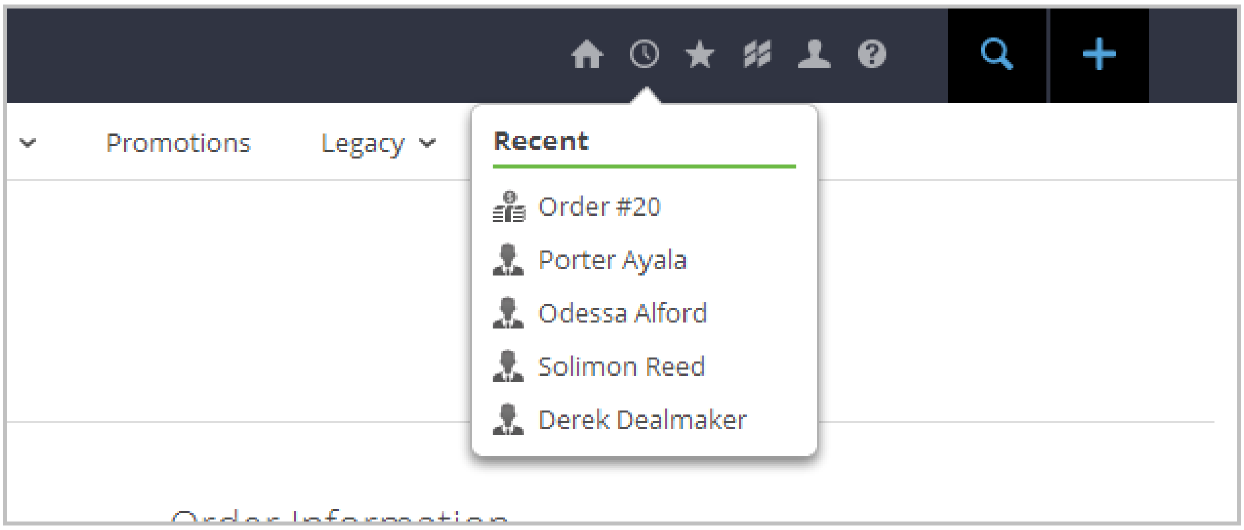

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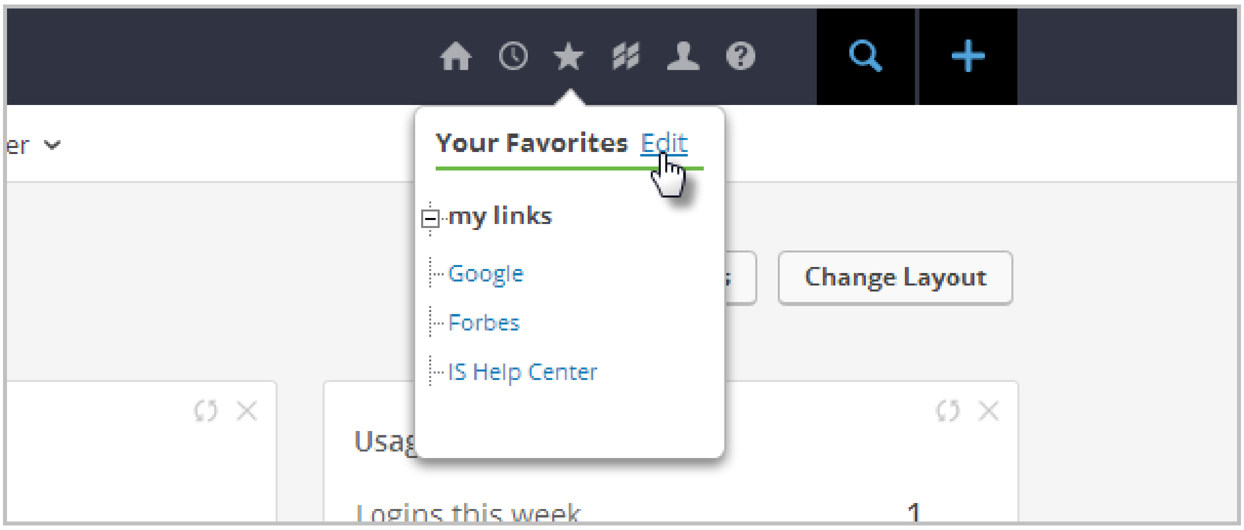

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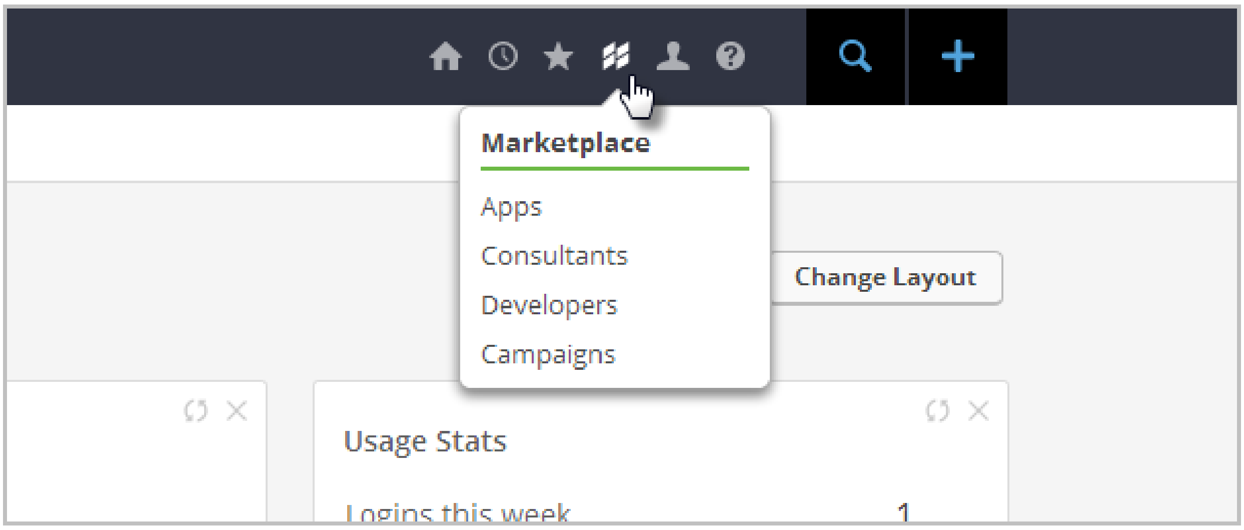

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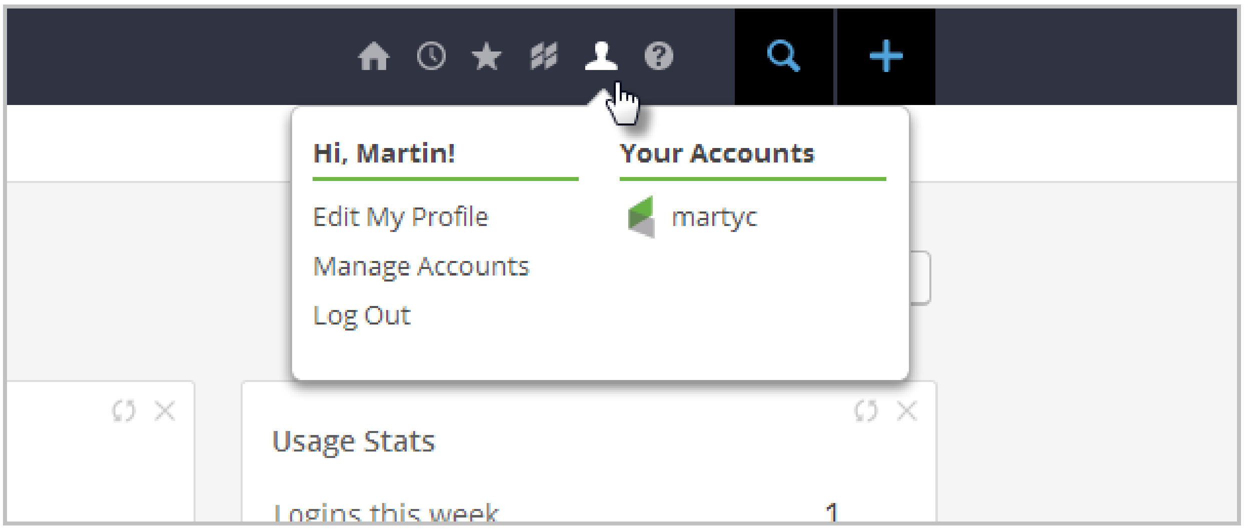

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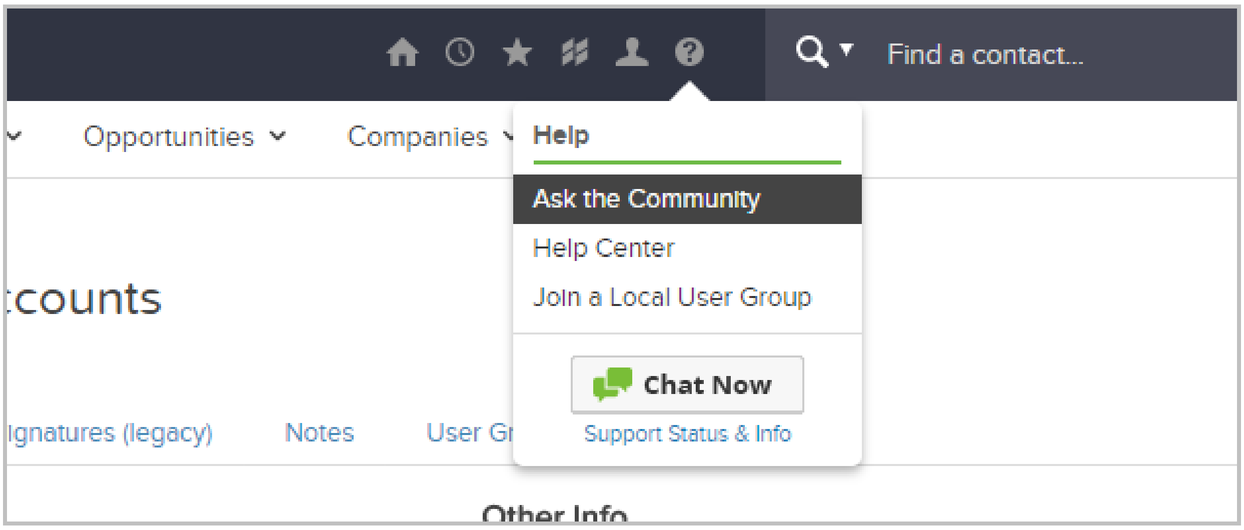
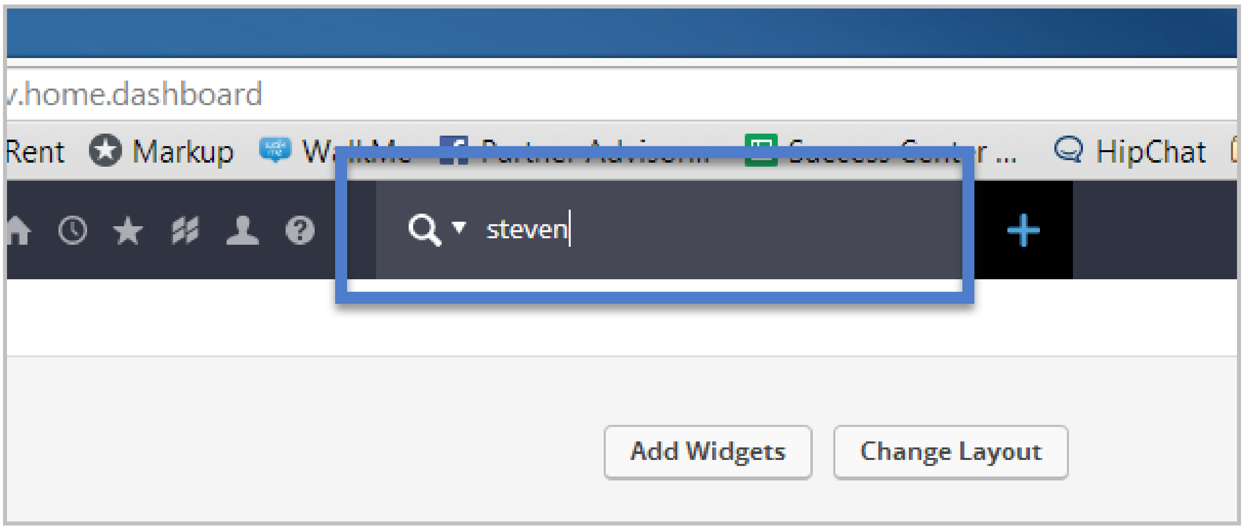
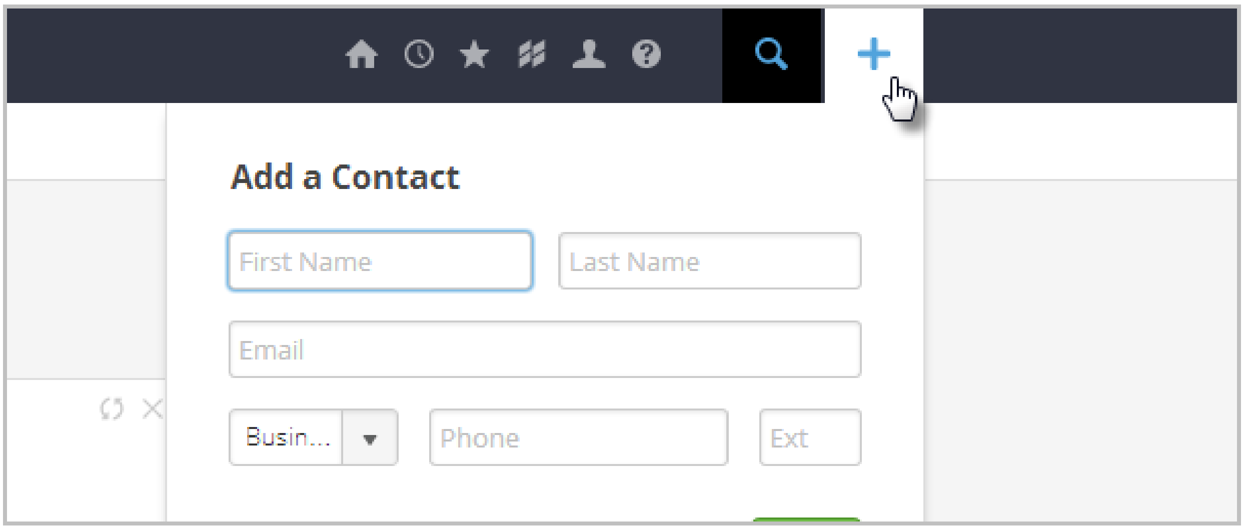


- **Search** - From this area, you can search for a specific record by name or ID number. Use the drop-down to select a different item to search for.



- **Contact Quick-Add** - Quickly add new contacts to Infusionsoft.


Add a Contact
First Name
Last Name
Email
Busin...
Phone
Ext

Upload Your Company Logo

Last Modified on 09/28/2018 12:06 pm MST

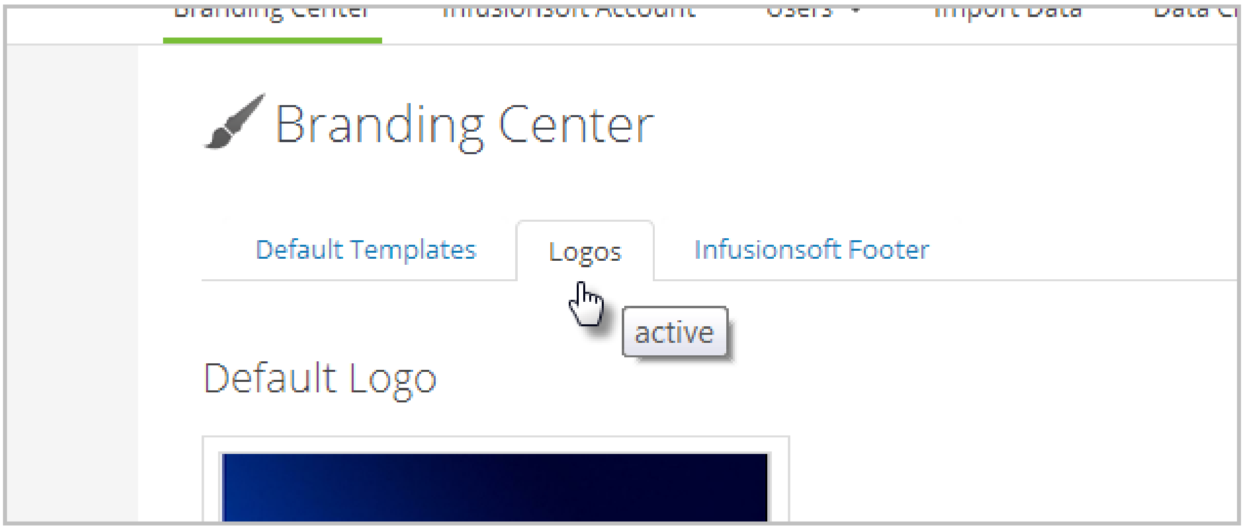
Upload your company logo to customize your Infusionsoft invoices, opt-in pages, sign in screens, and more.

Logo dimensions are controlled by the following parameters:

- **External Pages** Logo - This image will be constrained to a max height of 150px. Width will be scaled by the browser.
- **Sign-in Pages** Logo - This image will be constrained to a max height of 60px. Width will be scaled by the browser.
- **All other** Logos - All other logo images will be constrained to a max height of 40px. Width will be scaled by the browser.

Image size is limited to 100kb. If you upload an image larger than 100KB, Infusionsoft will resample the image to meet the maximum file size. If Infusionsoft is unable to resample an image, it will be rejected. This is usually due to an image that is too large (several megabytes). If your image is rejected, try to reduce the file size to less than 1MB.

1. Click on the **Logos** tab

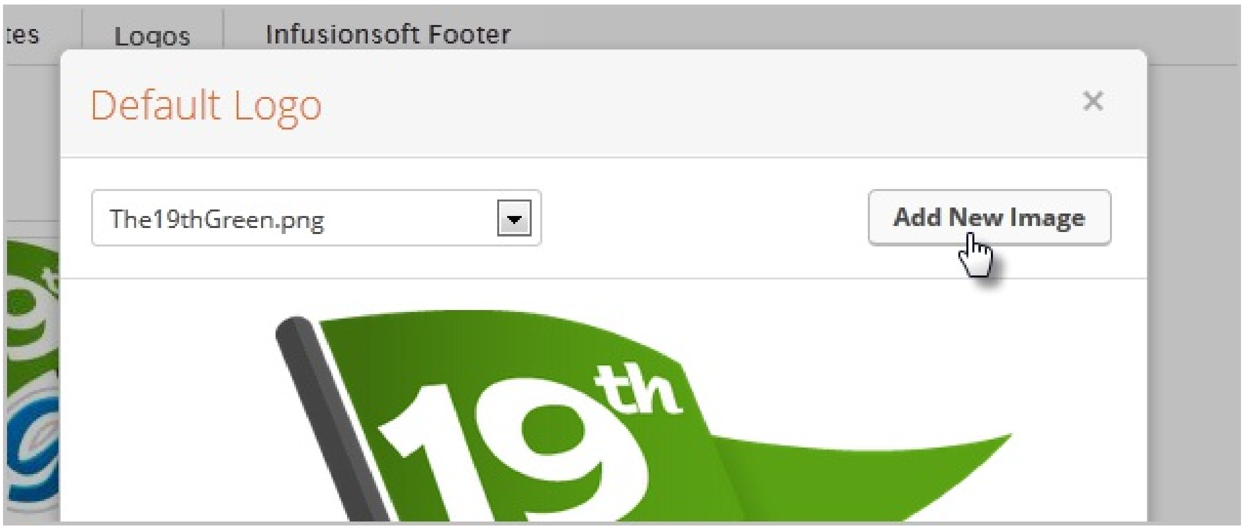


There are several different logo types to choose from:Go to **Admin > Branding Cente**r in the main navigation menu

- **Default Logo** - Your customers and prospects will see the master logo. It is displayed on invoices, digital product download pages, and opt-in/out confirmation pages.
- **Logo Snippet** - The logo snippet is available in the email and web form builders.
- **External Pages** - Displayed to your audience on opt-in/opt-out screens, invoices, and digital products.
- **Sign-in Pages** - Shown on the sign-in screen for your Infusionsoft users and referral partner center

2. Click the **Edit** link under the logo that you want to update.

3. Click the **Add New Image** button to upload a new image from your computer, or (optional) select an existing image from the drop-down.


Logos
Infusionsoft Footer
Default Logo
The19thGreen.png
Add New Image
19th

Using a different version of Infusionsoft? Click Here to learn more

Configure Your Email Footer - CAN SPAM Address Block

Last Modified on 09/28/2018 12:06 pm MST

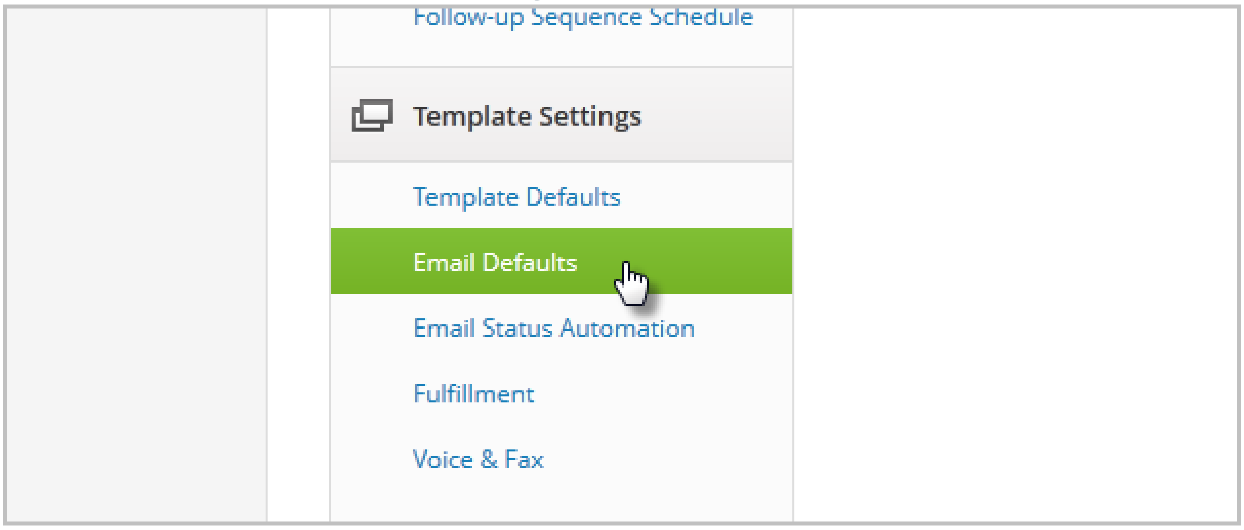
Your company information is displayed in some emails and on all opt-in/ opt-out confirmation pages by default. This information pulls from one of three places: the CAN SPAM address block, the company info fields, or a user profile.

CAN SPAM Address Block

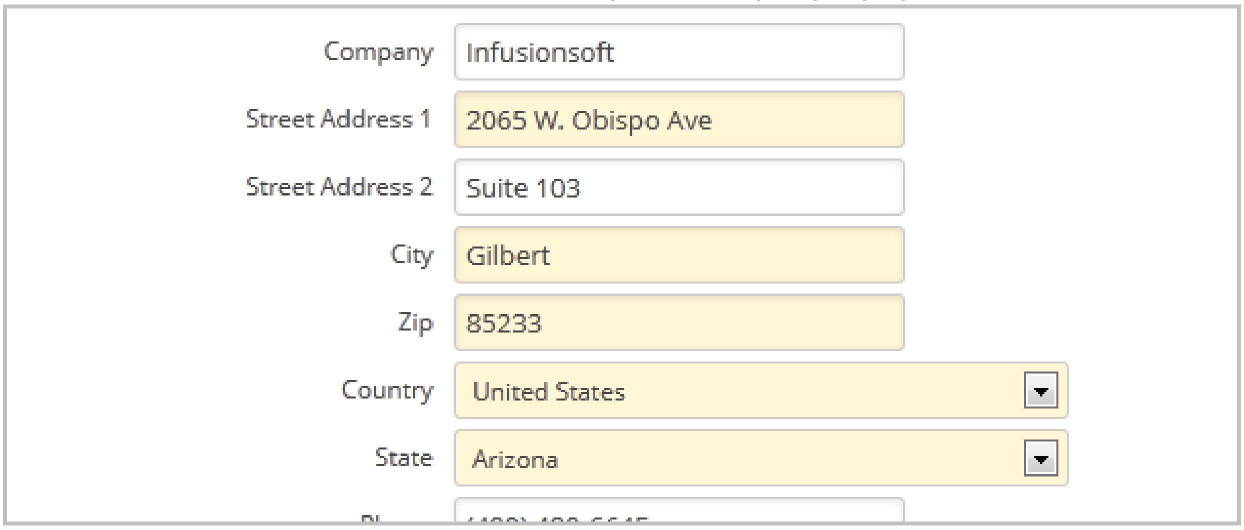
The CAN-SPAM Act requires that all commercial emails include the sender's valid physical address. Infusionsoft adds your company address to the bottom of all broadcast and follow-up marketing emails automatically to ensure compliance. If the CAN SPAM Address block is empty, you will not be able to send automated marketing or broadcast emails.

1. Go to **Marketing > Settings** in the main navigation menu

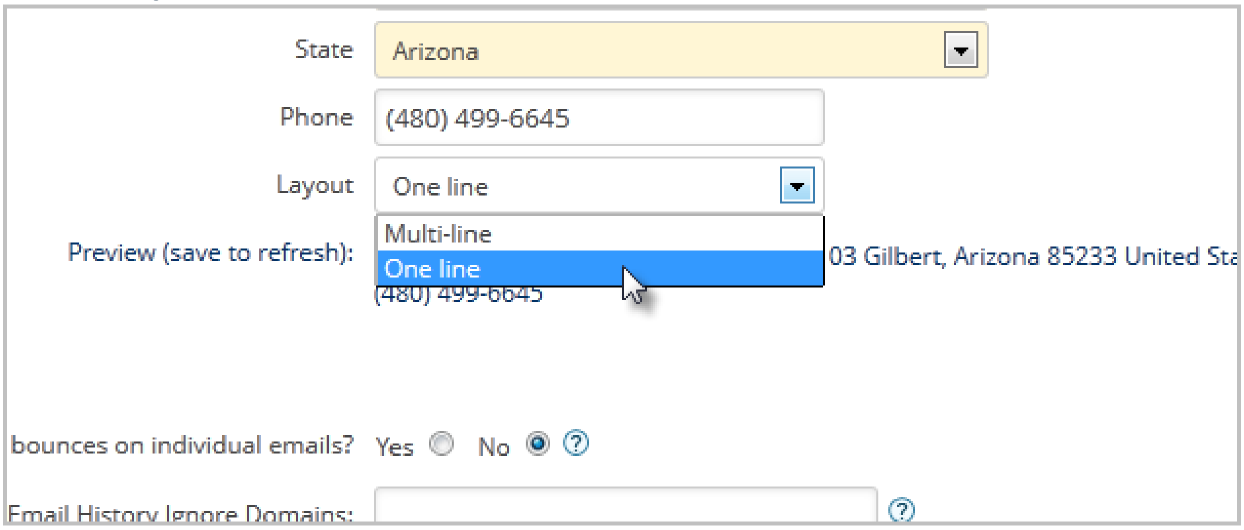
2. Click on **Email Defaults** in the Settings menu.



3. Go to the *Address Block* section to enter your company's physical address.



4. Select a Layout: *multi-line* OR *one line*.



5. Click **Save**.

Company Merge Fields

Your company name is merged into the default double-opt in confirmation emails and on opt-in/opt-out confirmation web pages. This defaults to the information you gave us when you signed up for Infusionsoft, but you can change it.

1. Go to **Admin** > **Settings** in the main navigation menu.
2. Go to the *Company Info* section to enter or edit your company name, tax ID, address, telephone, email, and website.
3. Click **Save**.

User Merge Fields

If you are using owner or logged in user merge fields in your Infusionsoft emails, the company information you're seeing may be pulling from a user profile. This is less likely, but still possible.

1. Go to **Admin** > **Users** in the main navigation menu and click on the name of one of your users.
2. Enter the correct information on the General tab and click **Save**.

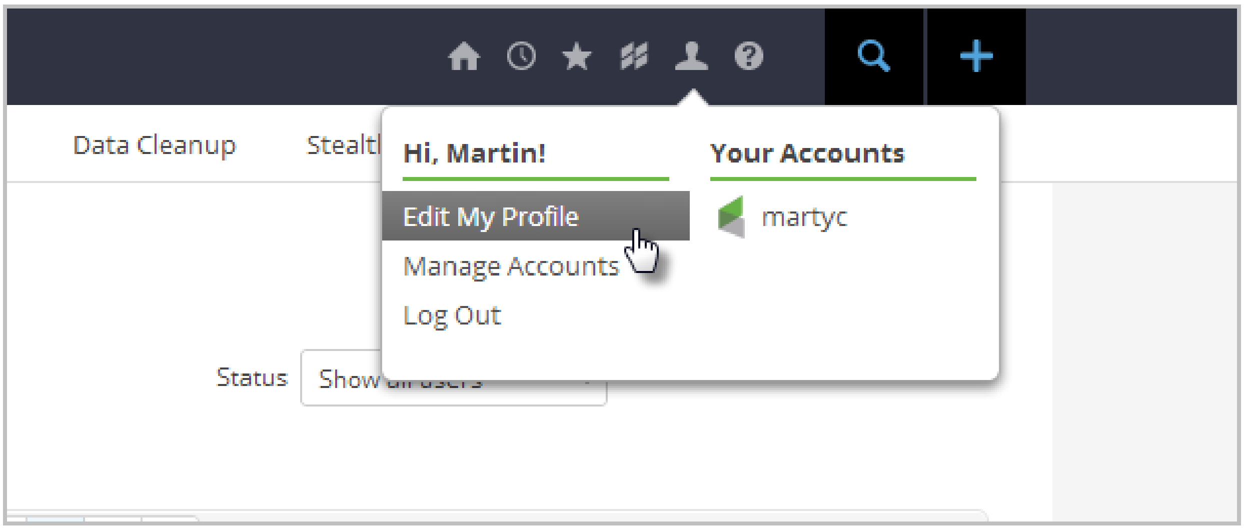
Using a different version of Infusionsoft? Click Here to learn more

Customize Your Email Signature

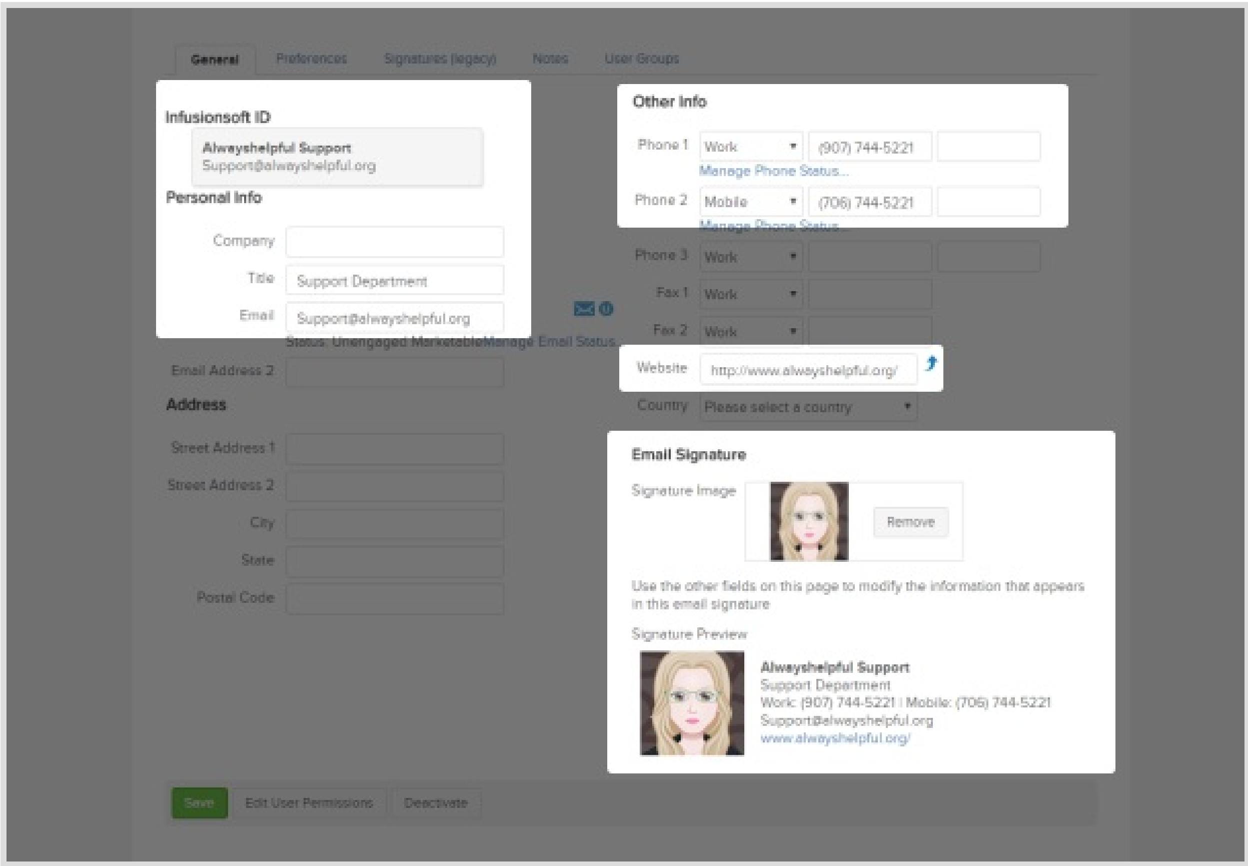
Last Modified on 09/28/2018 12:07 pm MST

Edit Your Email Signature

1. Click on **Edit My Profile** in the user toolbar to customize or update your profile.



2. On the right side of the page, you'll see the**Email Signature** section. This shows you what your signature will look like when it is merged into emails. You can also upload an image of your business logo or an image/avatar of yourself.



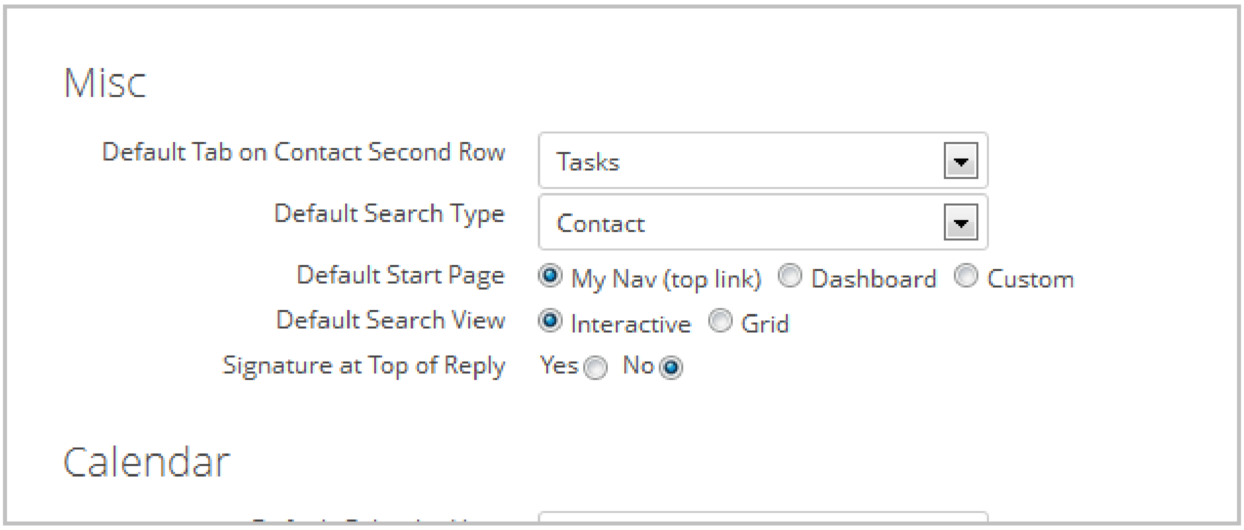
3. Your Signature will automaticaly update with the information entered in

- Infusionsoft ID Name
- Company
- Title
- Email
- Phone 1 & 2

- Website

Change Your Preferences

Preferences: Increase efficiency by setting up preferences that correspond with job responsibilities. Make sure each user has quick access to the most relevant information to perform their daily tasks within Infusionsoft.



- **Default Tab on Contact Second Row**: This setting controls which tab shows up first when you view the lower portion of a contact. The tasks tab is the default view. Use this setting to ensure the most relevant history is displayed for each user's role (i.e., a sales rep needs to see opportunities.)

- **Default Search Type**: This setting controls the default search type for the quick search box located at the top right of your Infusionsoft application. Select from Contact, Company, Task/Appt/Note, Order, Subscriptions, or Opportunity.

- (Optional) **Default Start Page**: This setting controls the first page a user sees when they sign in to Infusionsoft. Navigate to the page you want to use as your home page and copy the URL beginning with /Admin/ from a different page to override the default (e.g., /Admin/myFiles.jsp.) The Infusionsoft home page is the default.

- (Optional) **Default Search View for Contacts and Opportunities**: This setting controls the way you view lists of contacts and opportunity records. Interactive View increases efficiency when working and updating lists. You can change this to grid-view if you prefer to view more records per screen and align the data into spreadsheet-style columns.

- (Optional) **Signature at Top of Reply**: This setting controls the location of your signature in email replies sent by the Infusionsoft email client. Skip this if you are using the Outlook Plug-In or a different email program to check your email. This is set to *no* by default. Set it to *yes* if you are using the Infusionsoft email client to check and reply to email messages.

- **Default Calendar View**: This setting controls the number of days displayed on your calendar. It is set to day by default. Select from day, week, or month.

- **Default Start and End Hour**: This setting controls the daily time range displayed on the your calendar. Adjust these settings if a user works non-standard hours.

- **Time Zone**: Your time zone will be auto-detected when you first create your Infusionsoft account.

Manage User Groups

- **Admin**: Assign a user to the admin group if their job responsibilities include advanced Infusionsoft administration (e.g., importing, setting up system defaults, managing users.) Users in the admin group have access to all areas of Infusionsoft and view all of the available reports. They will be able to use your Infusionsoft system without restriction.

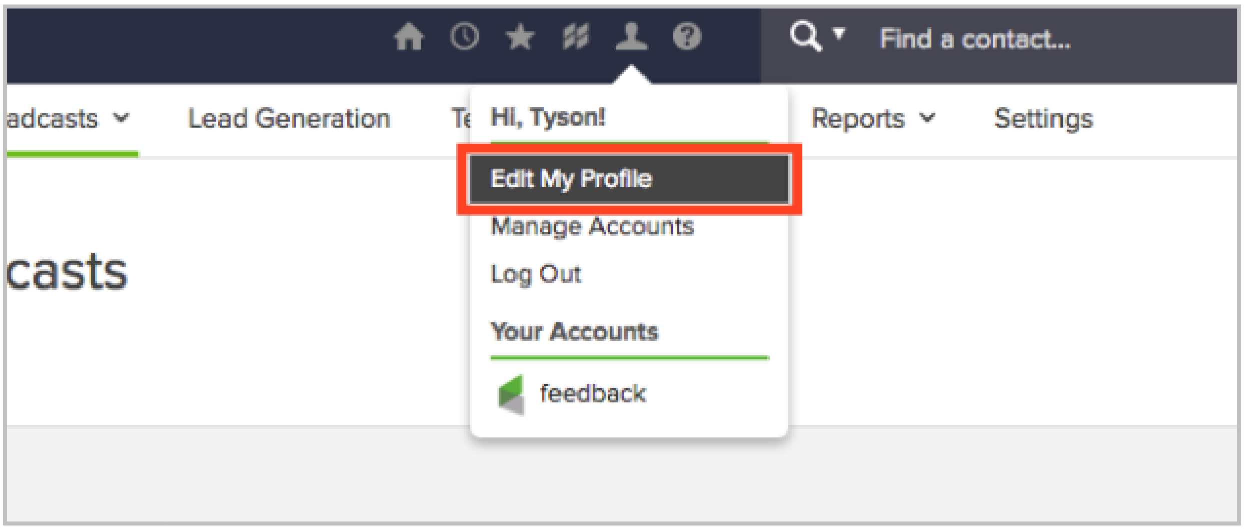
- **Sales Rep**: Assign a user to the sales rep group if their job responsibilities include contacting leads, tracking the sales process through opportunities (e.g., adding notes, moving sales stages.) Users in the sales rep groups can create and be assigned to an opportunity.

Using a different version of Infusionsoft? Click Here to learn more

Change Your Infusionsoft Id Email Address

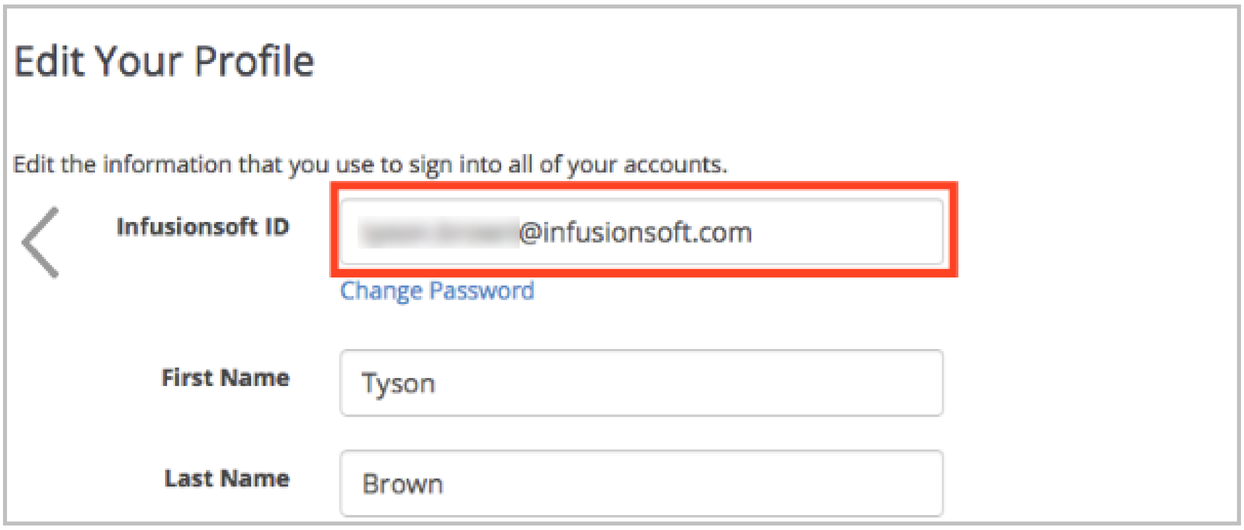
Last Modified on 09/28/2018 11:54 am MST

1. Select **Edit My Profile** from the header navigation bar

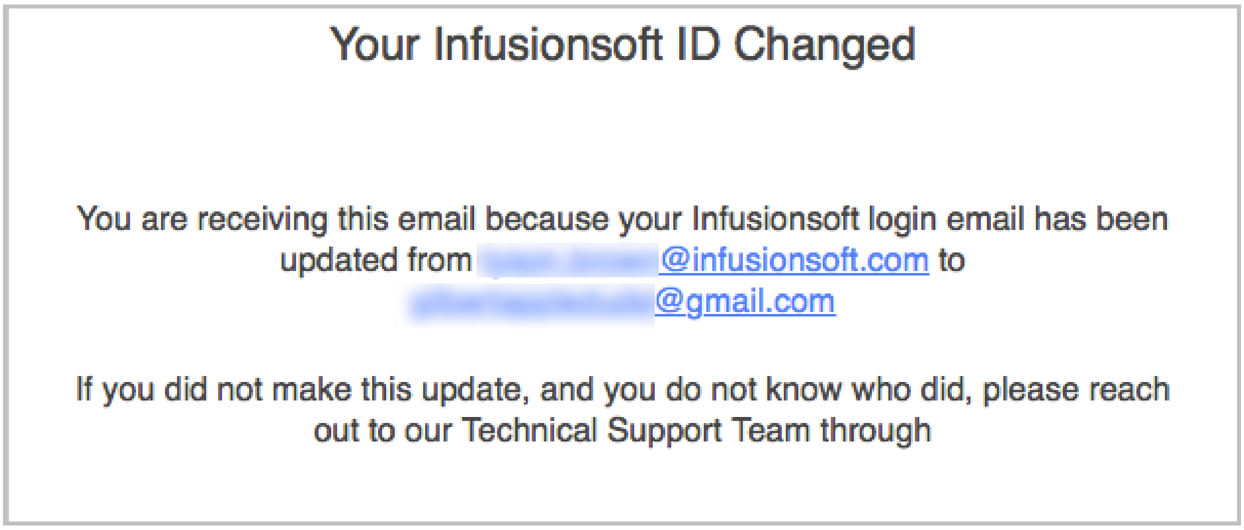


2. Select **Edit** next to your email address under "Your Infusionsoft ID"

3. Change your email address from in the "Infusionsoft ID" field. Click **Save** when you are finished.



4. Give yourself a high five! Once you have successfully changed your login email address, you will receive the following email to both your former login email address AND your new one:



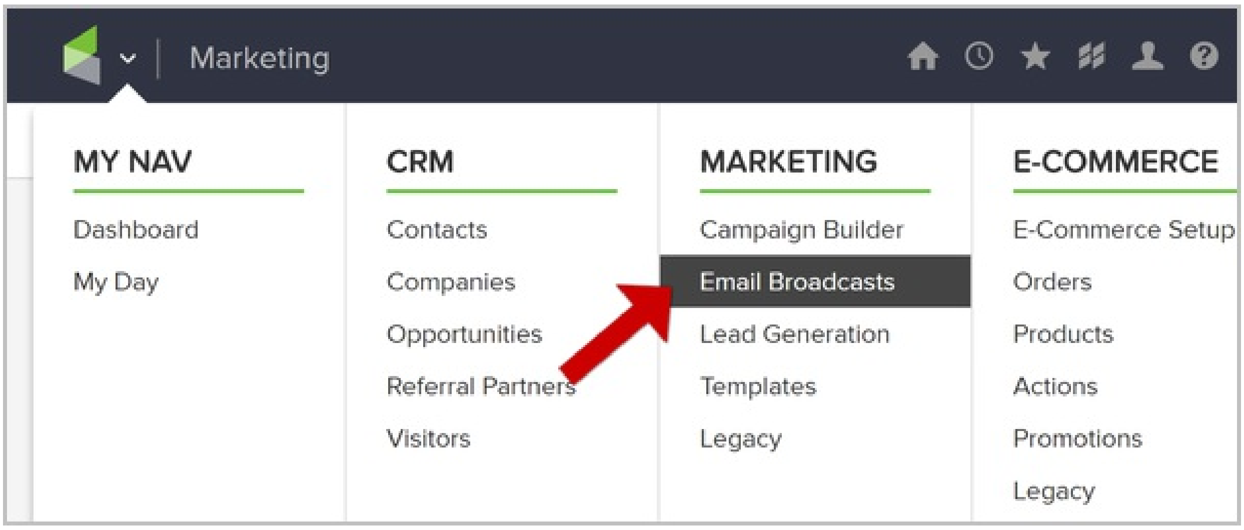
Using a different version of Infusionsoft? Click Here to learn more

Set Up Campaigns, Emails, Landing Pages and Report Marketing ROI

Last Modified on 08/15/2018 9:00 am MST

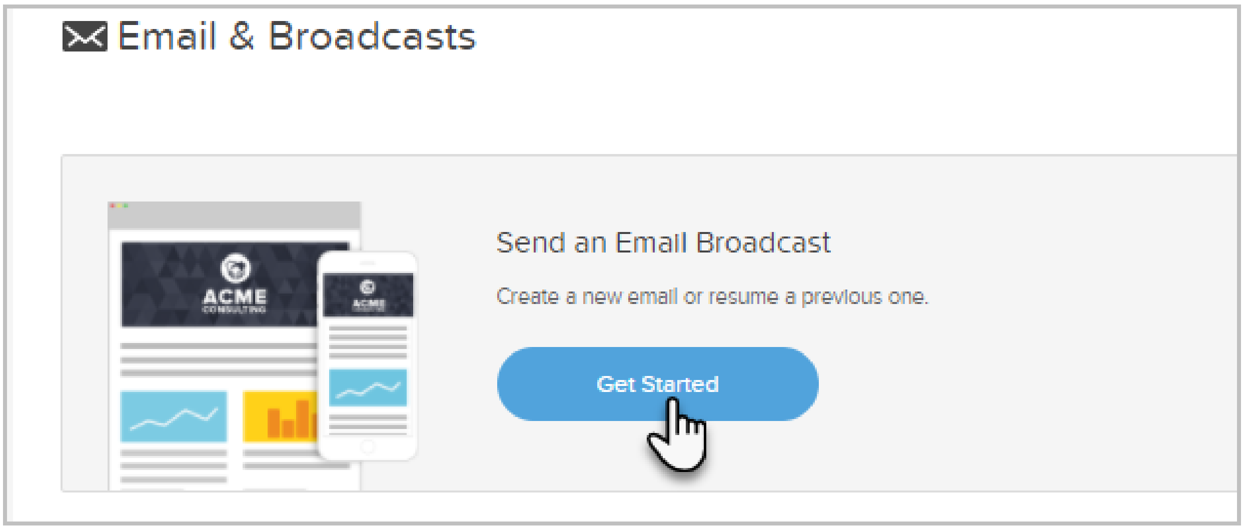
Email Builder

Choose from a wide selection of hand-made email templates, or build it from scratch using our Email Builder tool.



Send an Email Broadcast

Send an immediate or scheduled marketing email to your contacts. It's suggested that you first read how to segment contacts so you can send the broadcast to a targeted list.



Campaign Builder Overview

Learn how to download pre-built campaigns and how to create them from scratch. Learn how to add contacts to a campaign with **Goals**.

Campaign Sequence Overview

A Campaign Sequence is an automated series of marketing events (usually emails) that starts automatically when someone submits a web form, landing page or if any number of **Goals** have been achieved.

Campaign Publishing

Take the anxiety out of "going live" by learning how to Publish a campaign and how to make changes to a live campaign.

Landing Page Builder

Create a great looking Landing Page quickly using the Landing Page Builder. Choose from a wide selection of pre-built templates, or create your own from scratch.

Campaign ROI Reporting

Now that your campaign is running, learn how to leverage reporting to monitor the effectiveness of your marketing efforts.

Using a different version of Infusionsoft? Click Here to learn more

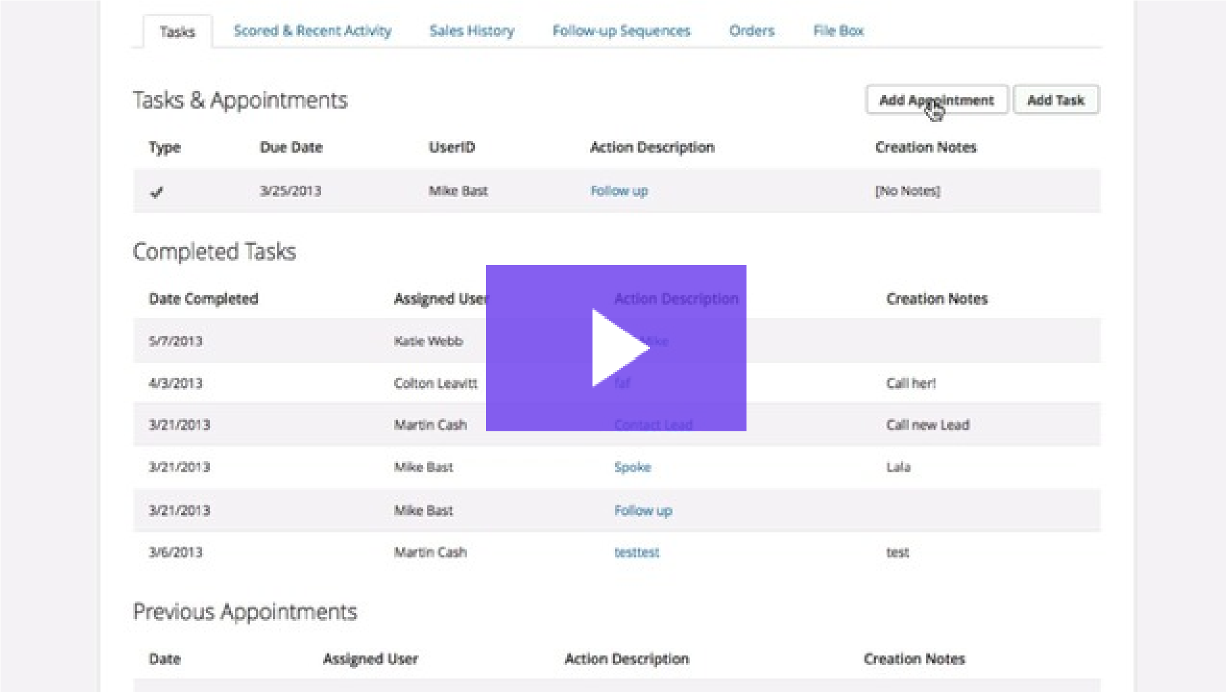
Learn How Sales Reps Manage Leads in Infusionsoft

Last Modified on 06/05/2018 12:56 pm MST

Important! In order to be able to see and manage opportunity records, an admin must add you to the Sales Rep group!

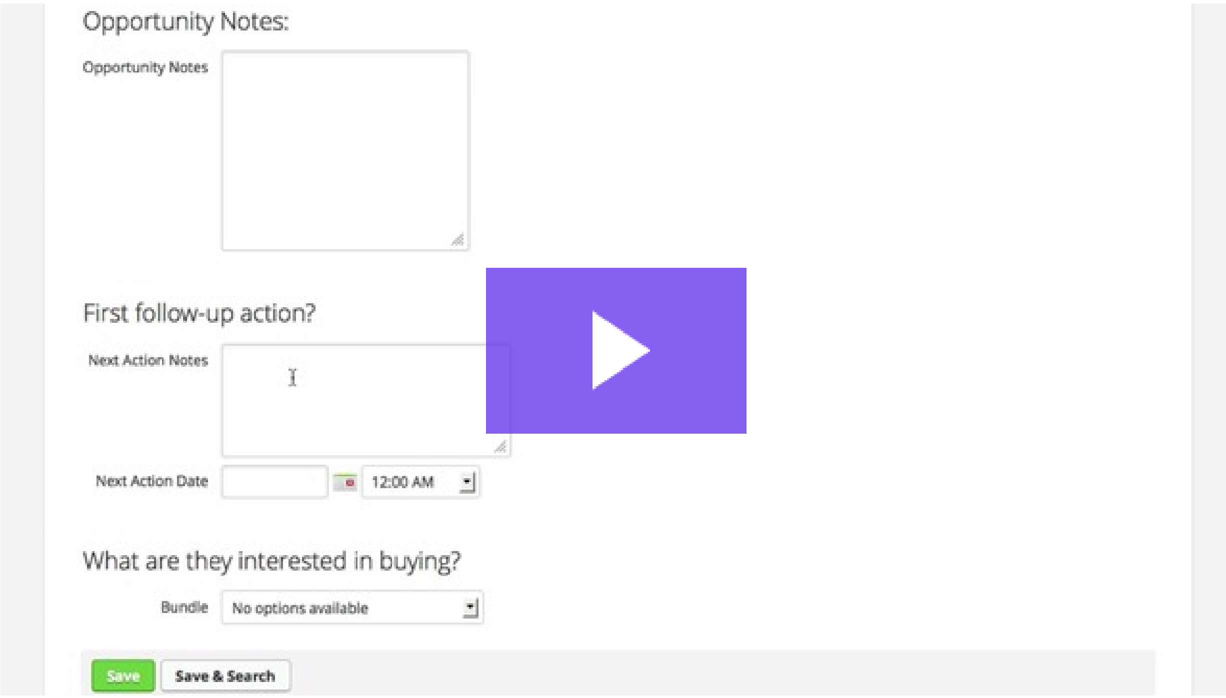
Watch the Opportunity Management Overview Video

Watch the Opportunity Record Overview Video



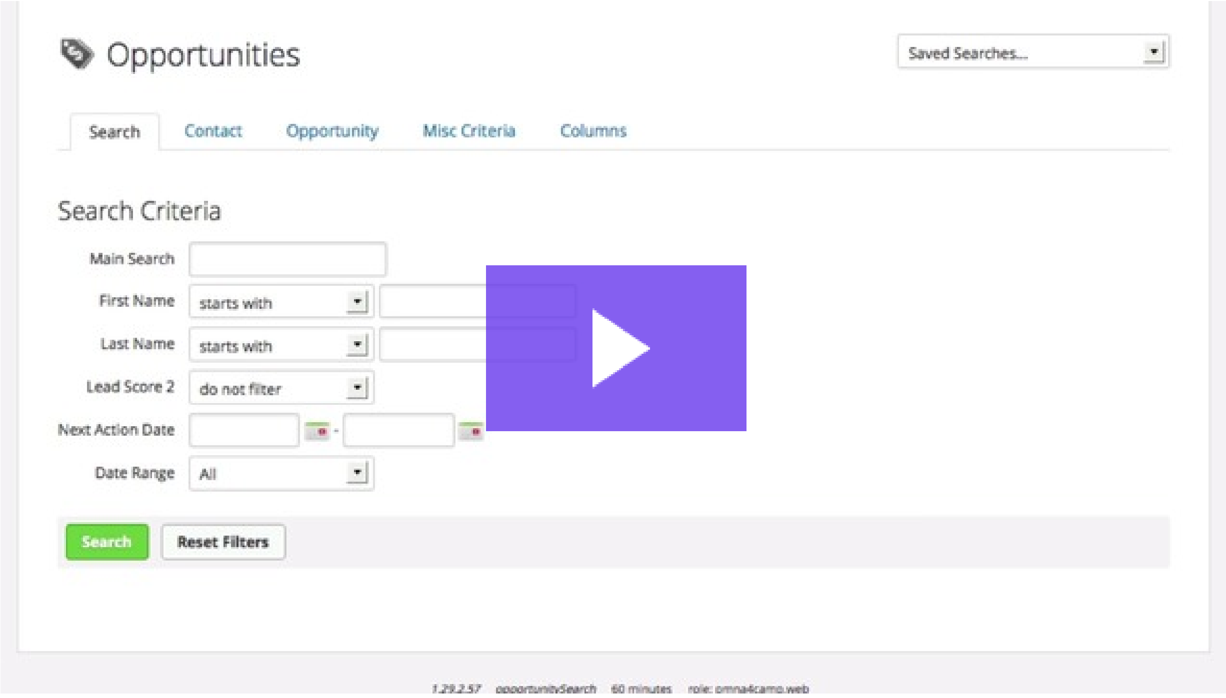
See How to Create An Opportunity Record

Create an opportunity manually from a contact record.



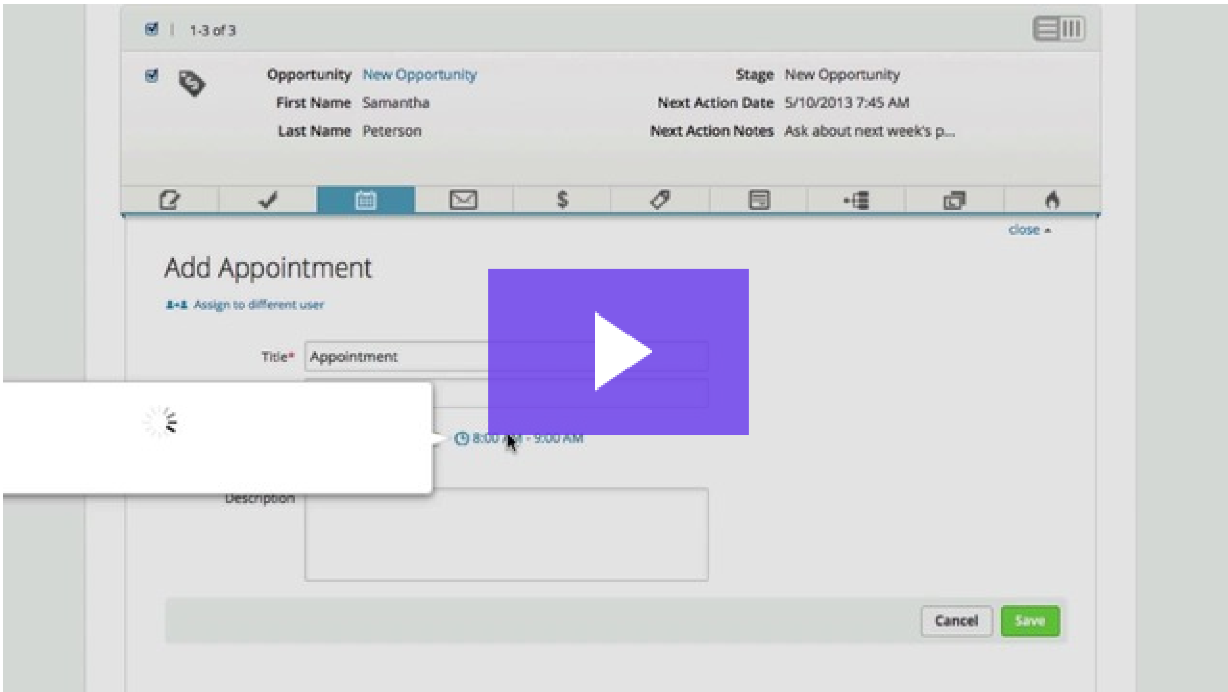
Find Your Opportunity Records and Add Them to Your Dashboard

Find your sales opportunities and add reports to your Dashboard



Work Your Leads

There are a few different ways to work your leads in Infusionsoft. One of the most common methods is searching for your leads and working them in the Interactive View - this allows you see a list of all your leads and interact with them without having to open each individual contact record.

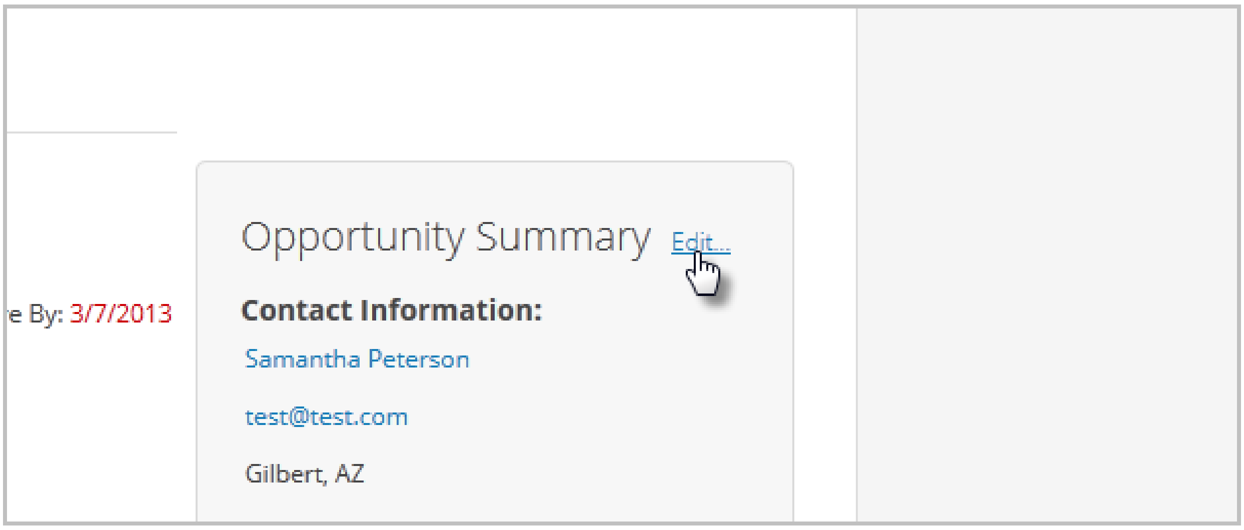


How To Use The Next Action Fields In An Opportunity Record

Next action dates help you track task commitments related to the direct sales process. The idea is simple - enter notes and the next action date that you want this opportunity to show up on your dashboard. Click here for a more in-depth article .

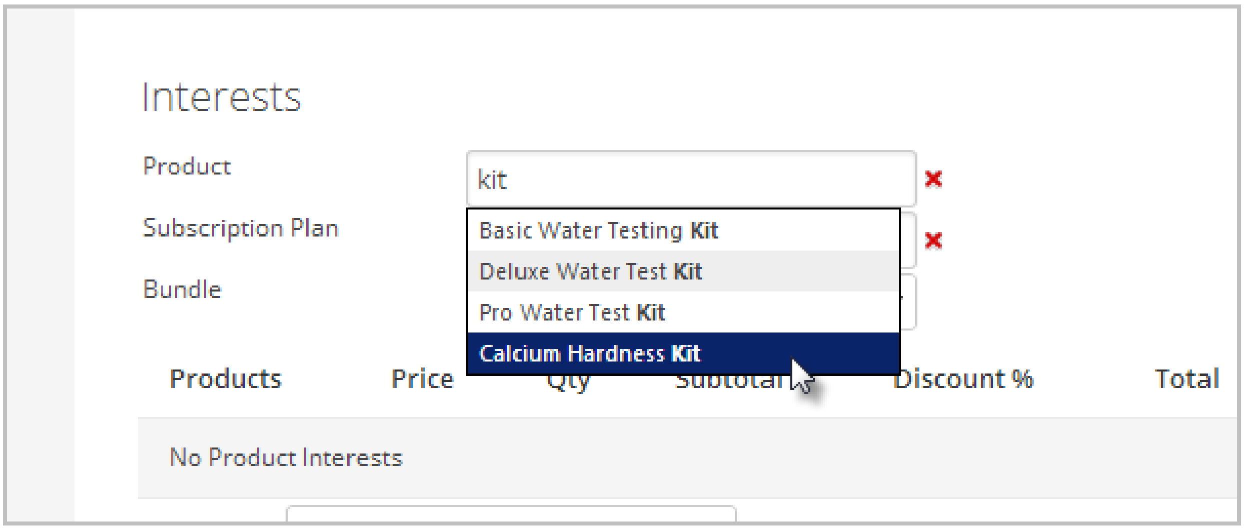
Update The Opportunity Summary

The opportunity summary section is the best place to keep information you want "front and center." It is like putting a sticky note at the top of the opportunity record.



Track Product Interest In An Opportunity Record

If you have our E-Commerce module, you can add the products and subscriptions that your opportunity is interested in. Doing this allows a sales manager to forecast revenue. Click here to learn more

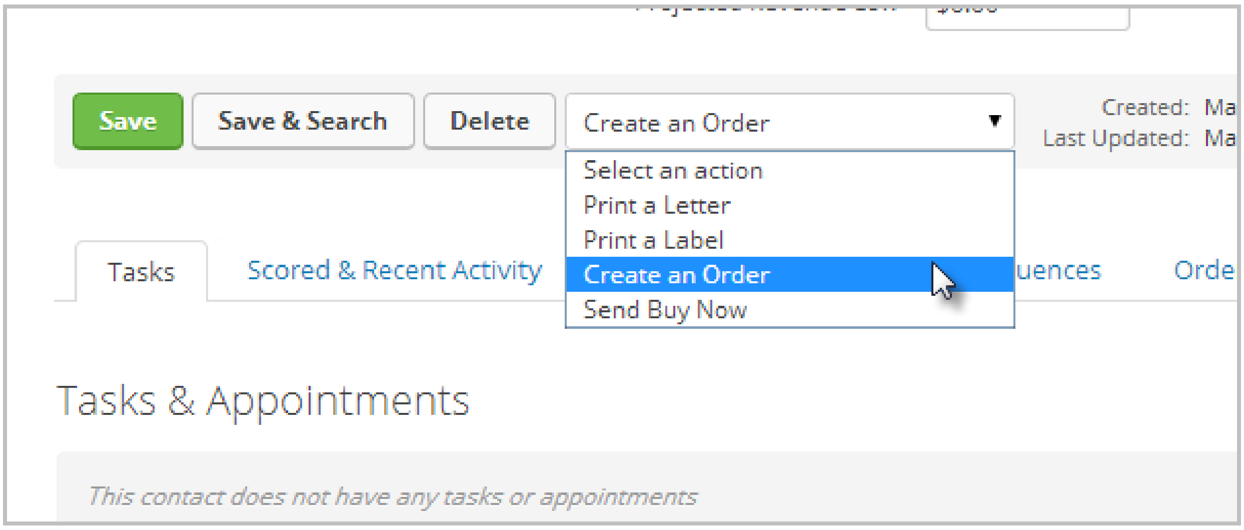


Send A Buy Now Link From An Opportunity Record

If you have the E-Commerce package and are tracking product interests (shown above), than you can send your opportunity a link to make the purchase online through the shopping cart.

Create An Order From an Opportunity Record

You can also create an order directly from the opportunity record.



Assign A Referral Partner To An Opportunity

If you are using the Referral Partner Management module, you can assign a referral partner to the opportunity . For example: Your company may have a partner program that pays referral partners commission for the leads they send to you. When a partner sends you a lead, you will need to make sure the referral is tracked in your opportunity record so that the affiliate will receive credit for the lead. The commission is calculated when the deal closes and a purchase is made.

Using a different version of Infusionsoft? Click Here to learn more

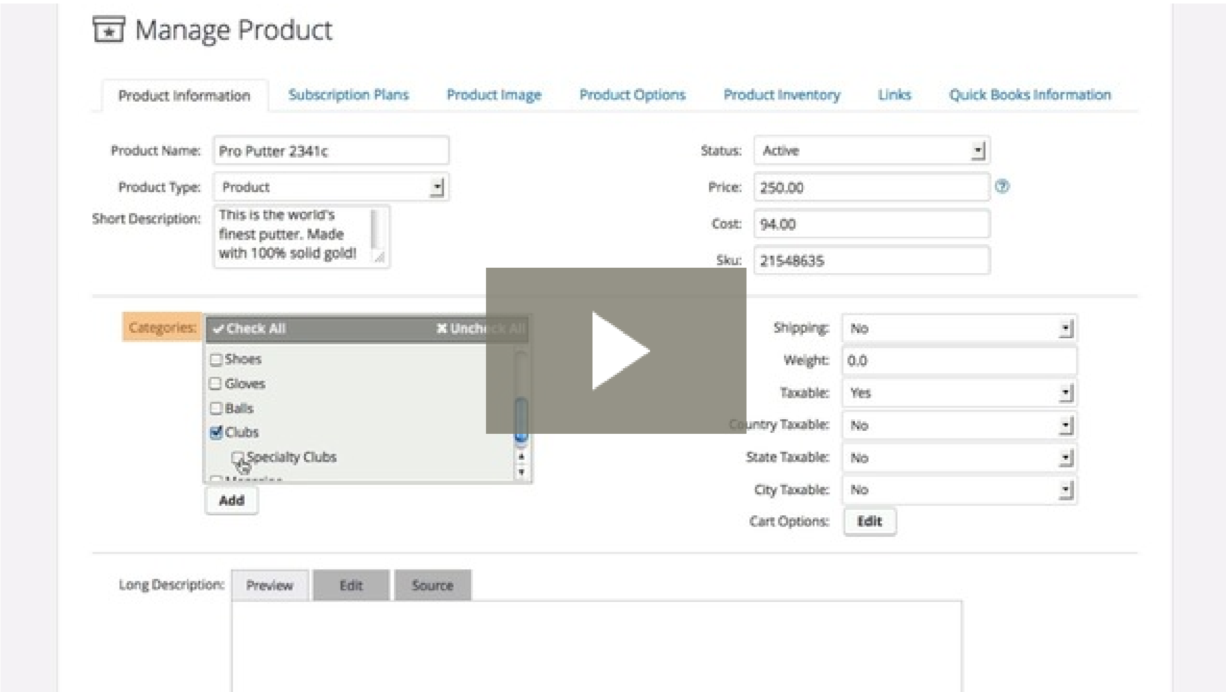
Set Up Products, a Merchant Account and Billing Automation

Last Modified on 08/14/2018 2:15 pm MST

Choose A Merchant Account

Sign up now for Infusionsoft Payments or choose from one of the alternative merchant account offerings . You can also use PayPal Express Checkout but there will be some limitations discussed here .

Set Up Your Products



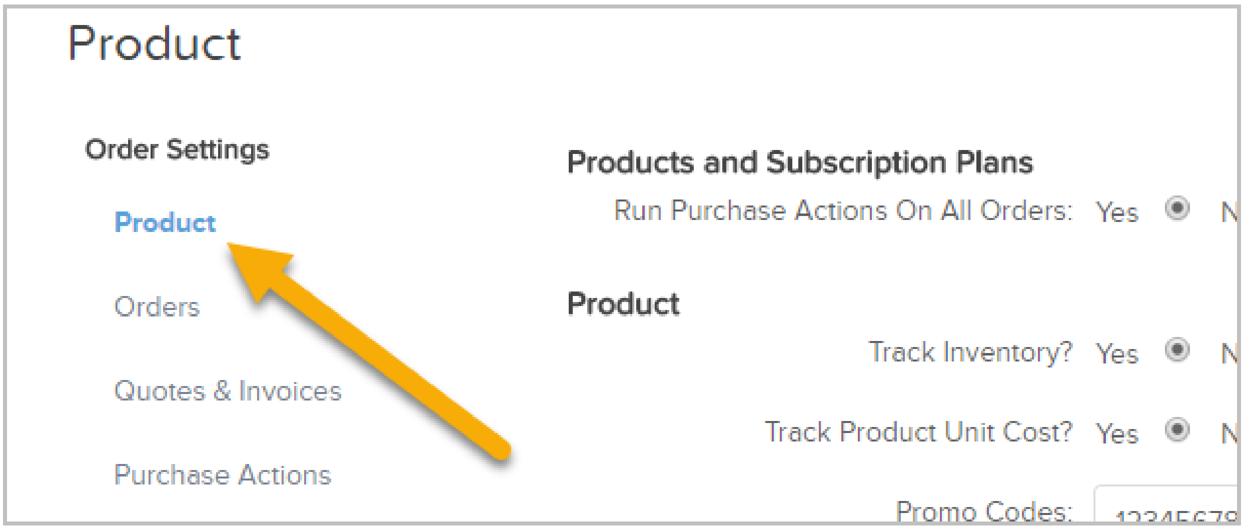
- Learn how to set up a one-time purchase product or a recurring subscription product .
- Import your existing products or subscriptions .

- Add product options like size and color.
- Learn all about product images
- Organize your products and subscriptions with product categories .
- Manage product inventory to automate "Sold Out" messaging and learn how to adjust inventory manually
- Create Product Interest Bundles which are links that automatically fill a shopping cart with the items and quantity that you configure.

Configure Your E-Commerce Settings

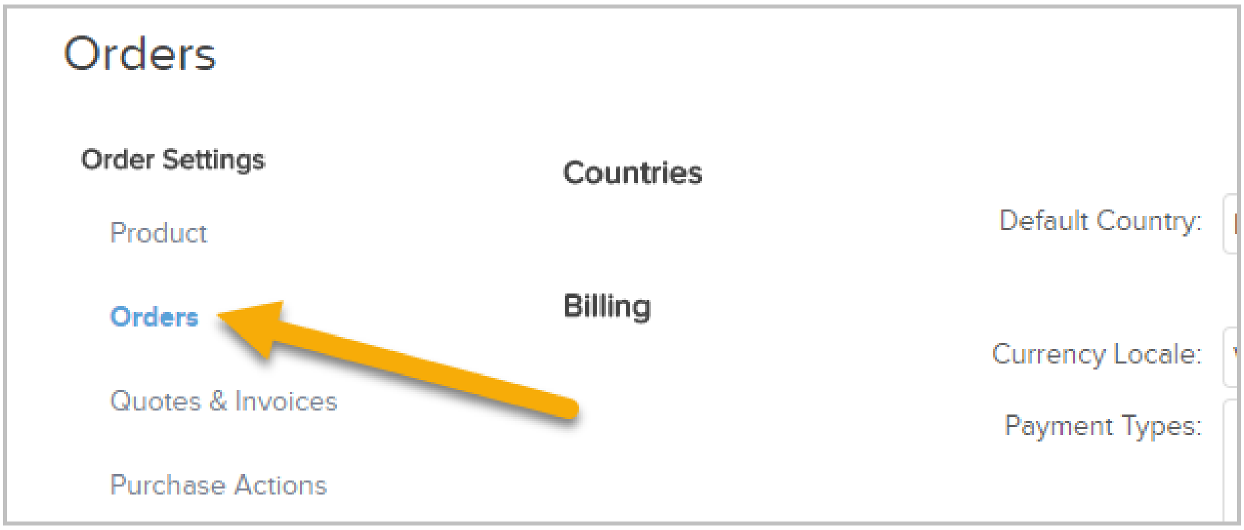
Review your E-Commerce settings (**E-Commerce** > **Settings**). There are some very important settings here that you don't want to gloss over!

Product Settings



- **Run Purchase Actions On All Orders** - This setting enforces the Billing Automation rules (that you will learn how to set up later) to run not only on shopping cart and order form orders, but for manual orders too. It is recommended to enable this feature, **Yes**.
- **Track Inventory** - It is recommended to turn this on so you will automatically have a "Sold Out" notice on your order form or shopping cart when you inventory is depleted.
- **Promo Codes** - It is suggested not to manage these here, but to go to**E-Commerce** > **Promotions** instead.

Order Settings



There are a lot of settings here and some may not apply to you. You cango here to see a descriptions of every setting. The most important ones are:

- **Default Autocharge** - Make sure to set this to **Yes** in order to autocharge recurring subscriptions and payment plans.
- **Default Charge Tax** - Enable this to apply Sales Tax automatically to an order.
- **Default Merchant Account** - Be sure to set this as the merchant account you set up previously. This will simply set your default merchant account on manual orders, and when you are building order forms in Infusionsoft.
- **Default Max Retries** - The default setting is 3, meaning that after 3 consecutively failed autocharge attempts, Infusionsoft will no longer try to process a payment on a particular order. It is typically not necessary to change this.
- **Number of Days Between Retries** - Building on the previous **Default Max Retries** setting, this is the number of days between each retry attempt. The default setting is 2, either 1 or 2 is typical here.
- **Email receipts/invoices upon successful payment?** You'll learn how to set up receipts further down this article. Make sure to enable this option to automatically email your customer a receipt.
- **Reset failed autocharge attempt counters when Credit Card changes?** It is recommended to turn this option on. This will reset the **Default Max Retry** attempts when a customer updates their credit card.

Credit Card Settings

Make sure to take a look at these settings:

- **CC Types** - These are the cards that will be available for your customers to choose from when entering their payment information on order forms and on the shopping cart. So if you don't want to offer American Express, you can just delete that entry and it won't be an option your customer can choose from when selecting which credit card to use. This will come in handy if you prefer not to allow a certain card due to higher fees or any other reason.

- **Allow UK Maestro Cards?** This simply adds **Maestro** as an entry in the CC Types.

Update Credit Card Page Header

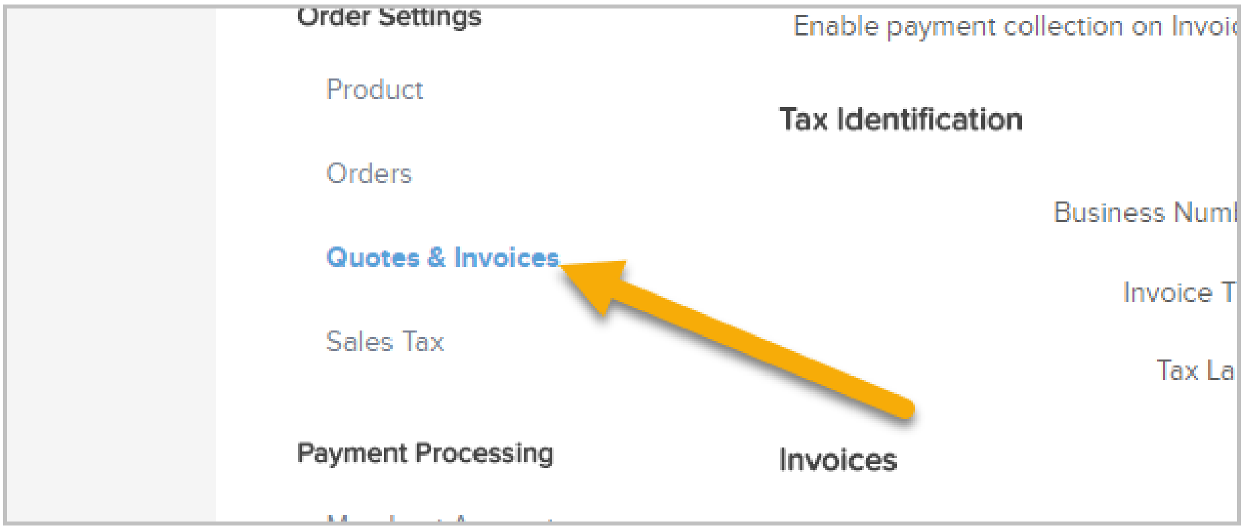
This is a powerful feature; however it does have a limitation that you need to be aware of. You can only send customers to the "Update Your Credit Card" page from an **automated email** that is part of **billing automation trigger** (there is a dedicated section to billing automation below that will explain this more clearly). Infusionsoft does not natively have a "Billing Portal" where your customers can sign in at any time and update their credit card information. They can only update their credit card information by clicking on one of these links. However, there are robust membership add-ons built by our Partners that solve this problem. If you decide that you need a robust billing portal with the added benefit of having a fully-functional membership website, check out these popular offerings or ask on the Infusionsoft Community what other customers like you enjoy using.

With that out of the way, the Header, Body, and Footer section can all be modified here. It's suggested that you use the same branding assets that you use on your website and emails so that your customer will trust the page and not be put off by a completely different looking page to enter their payment information.

Sales Tax

Follow these instructions to enable sales tax and to configure tax per product. Note that if you need to charge sales in the shopping cart, there is a separate setting that needs to be enabled.

Set Up Invoices, Quotes and Receipts



1. It's easy to get quotes, invoices and receipts set up in Infusionsoft. Just go to **E-Commerce** > **Settings** > **Quotes & Invoices**.
2. From here, you will want to make sure that *Enable payment collection on Invoices* is set to **Yes**. This will allow you to send good-looking, mobile-responsive quotes and invoices to your customer so that they can pay online.
3. Continue configuring your quotes, invoices and receipts. Note the **See Example** link next to each section to preview the document.

Billing Automation & Purchase Actions

Leverage this powerful feature to create Failed Auto-charge Automation , Credit Card Expiry Automation and much more .

Payment Plans

Offer your customers payment plans that better meet their spending budget. You can define the number of installments and number of days between charges.

Using a different version of Infusionsoft? Click Here to learn more

Create Orders and Set Up Order Forms and the Shopping Cart

Last Modified on 02/27/2018 10:38 am MST

Create Manual Orders

There are several ways orders can be created in Infusionsoft:

- (Manually) Creating an order by hand in the contact record
- (Automatically) Using order forms, the shopping cart, or with a 3rd party integration.

The video below will show you how to create an order by hand:

Set Up an Order Form

The quickest and easiest way to start selling your good and services online is to set up an online Order Form. Here is a quick video explaining what an order form is:

Now that you know what an Order Form is, the video below will show you how to set it all up

Set Up the Shopping Cart & Storefront

If you need to provide your customers with a catalog of goods & services, then a shopping cart may be the best choice for your business. Check out this video to learn the basics of the Infusionsoft shopping cart

Create Upsells and Other Promotions

Maximize revenue by offering upsells, order total discounts, promo codes, etc... Check out these articles to learn how.

Shipping & Fulfillment

If you are handling physical products, you can integrate with UPS Shipping or you can create your own custom shipping options . You can also leverage Fulfillment Reports to automate in-house or outsourced fulfillment houses.

Manage Refunds & Cancellations

Learn how to refund an order , cancel payments , and manage other aspects of a customers order and credit card on file .

Using a different version of Infusionsoft? Click Here to learn more

Set Up and Manage Your Sales Team in Infusionsoft

Last Modified on 08/07/2018 2:35 pm MST

Important! In order to be able to see and manage opportunity records, an admin must add you to the Sales Rep group!

Watch the Opportunity Management Overview Video

Watch the Plan Your Sales Stages Video

Edit the Default Pipeline Stage Settings

Before you begin setting up your sales pipeline, it is a good idea to go through all of the default settings and make any changes if needed.

Set Up Your Sales Pipeline Stages

Now that you understand the concepts, it time to start setting up your sales pipeline . Optionally, check out how to create stage checklists - these are check-boxes that the sales person needs to check in order to proceed to the next stage.

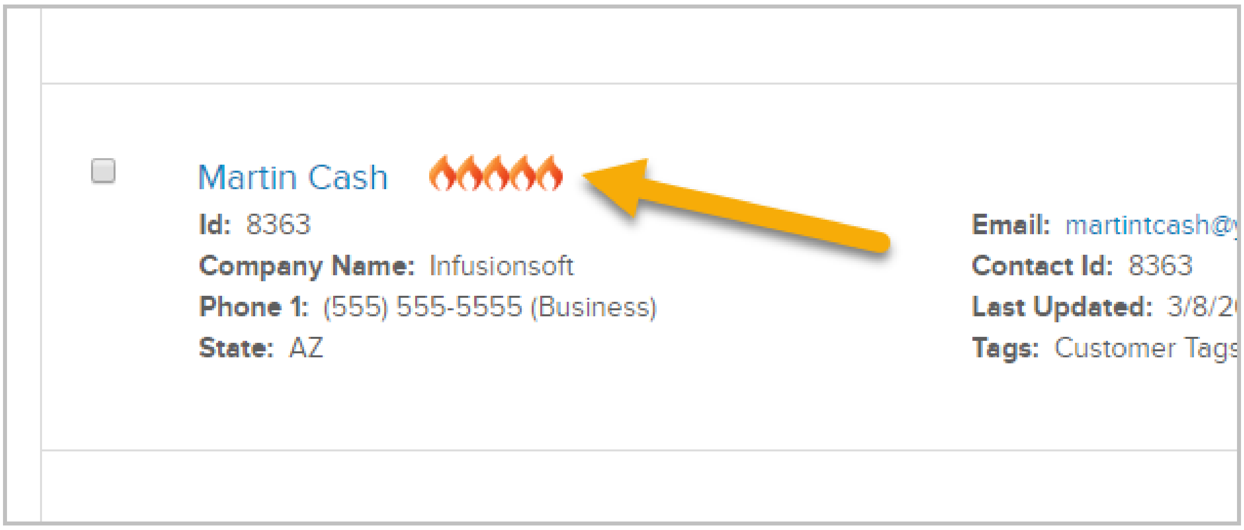
Add Users to the Sales Rep group

Before your users can start working their opportunities, you need to add them to the Sales Rep group. This will enable that user the ability to be assigned opportunity records.

Watch the Opportunity Record Overview Video

Set Up Lead Scoring

Lead scoring allows sales reps to focus on their hottest leads first.

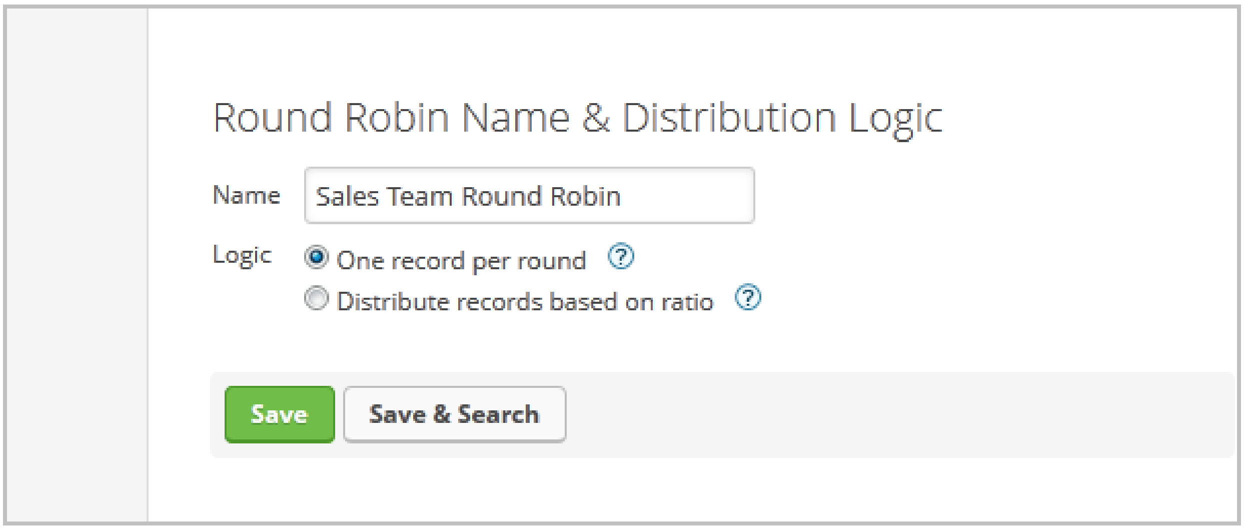


Allow Your Reps to Manually Change a Lead Score

In order to allow your reps to override the lead source score you'll need to set a few things up first.

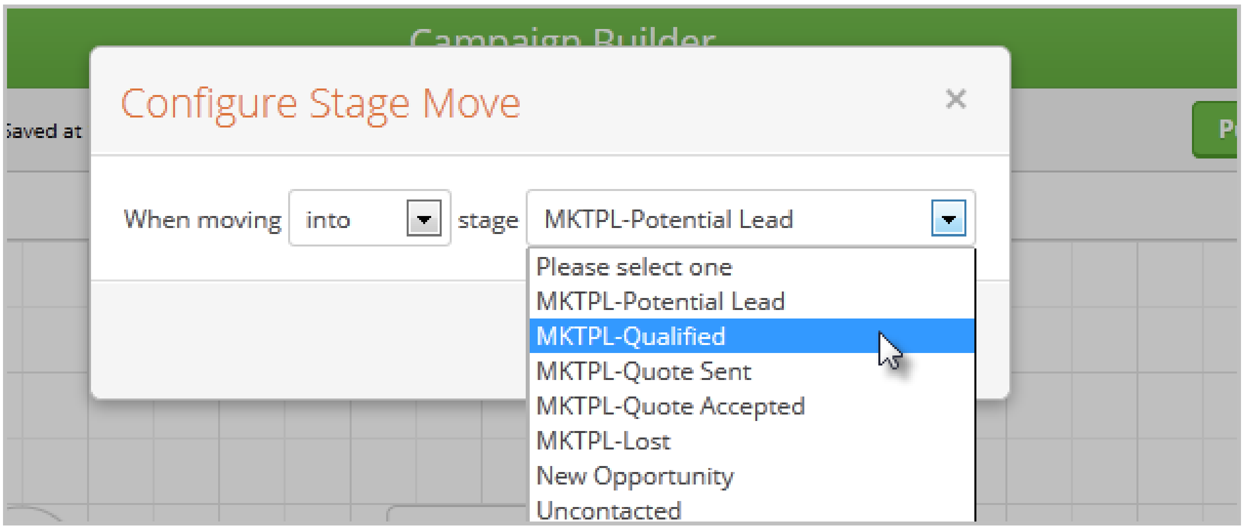
Assign Opportunities via a Round Robin

Now that you have your sales reps set and your pipeline stages ready to go, you'll need to figure out how you want to distribute leads as they come in. If you have multiple sales people, the best way to manage this is with a Round-Robin lead distribution rule.



Integrate Pipeline Automation into Your Marketing Campaigns

Now it's time to automate! Learn how to automatically create and distribute opportunities in a campaign . You can also automate marketing messages based on a sales person changing the sales stage of an opportunity.



Configure your Dashboard to Manage Sales Rep Activity & Effectiveness

Now that you have everything set up, it's time to track your pipeline and your sales team's effectiveness.

- The Opportunity Pipeline Summary is a good start to get a big picture snapshot showing opportunities in each stage, projected and weighted revenue, and average number of days spent in each stage.
- To get a more detailed report showing all opportunities per rep, the best thing to do is simply to search for opportunities belonging to a specific rep and then adding that report to your dashboard - then rinse and repeat so you have a dashboard widget for every sales person. Now, you can sign in to Infusionsoft and know exactly what leads each sales rep is working on.

Create Opportunity Records En Masse

Using a different version of Infusionsoft? Click Here to learn more

Set Up and Manage Your Referral Partner Program in Infusionsoft

Last Modified on 06/11/2018 11:00 am MST

Watch the Referral Partner Program Overview Video

Decide How Partners Will be Tracked

If two partners are marketing to the same person and the person clicks on both of the partner's links...which partner gets credit for the sale? Check out the How Partners are Tracked article to see how to configure your referral partner settings to properly manage these scenarios.

Configure the Default Commission Program Tracking and Payout Options

Just a couple of things to configure here before creating your first commission program. Will you be paying your affiliate a percentage of the sale or a flat rate...or both?

Create a Commission Program

Now that you have the basics down and have made some decisions on how you will be setting up your referral partner system, it's time to cocreate your first commission program in Infusionsoft.

Set Up Tracking Links

Now it's time to create some tracking links so that your referral partners can promote your products and services.

Set Up the Referral Partner Center

Next, it's time to set up the referral partner center so that your partners can sign in and generate links, build ads, and review their affiliate ledger. Note that the Referral Partner Center is a separate sign-in and doesn't use up any user licenses on your account. You'll also want to know how to quickly preview the referral partner center.

Understand How Your Referral Partners Can Leverage the Referral Partner Center

Click here to see articles created to help your referral partners take advantage of the referral partner center.

Build a Referral Partner Signup Campaign

Now that you have everything set up, it's time to automate! You can start by downloading a pre-built campaign, or you can build it from scratch.

1. The first thing you'll need to learn is how to recreate a referral partner registration form in the campaign builder.

2. Then, you'll want to learn how to merge referral partner fields into an email (like their user name and password).

Learn Referral Partner Reporting

Time to check out how well your referral partners are doing. It's important to know who your top partners are so that you can establish closer relationships with them.

Using a different version of Infusionsoft? Click Here to learn more

Chat, Phone and Community Support

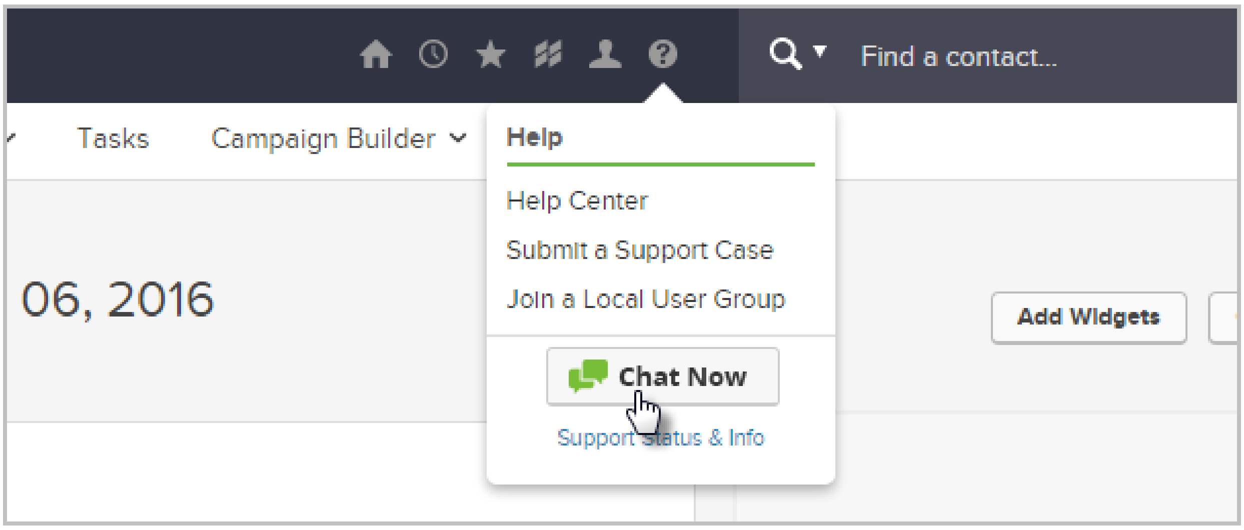
Last Modified on 09/28/2018 12:08 pm MST

Ask the Community

Click here to ask a question to the Infusionsoft Community.

Live Chat 24/7

Just hover over the Question icon on your toolbar and click the **Chat Now** button.



Call Tech Support

Region	Toll Free Number
US/Canada Toll Free	+1 866.800.0004 ext. 2 Mon - Fri: 6AM - 7PM Arizona Time

Region	Toll Free Number
UK Freephone	44.(0)808.258.0093 Mon - Fri: 6AM - 7PM Arizona Time
AUS Free Call	61.800.730.419 Mon - Fri: 6AM - 7PM Arizona Time

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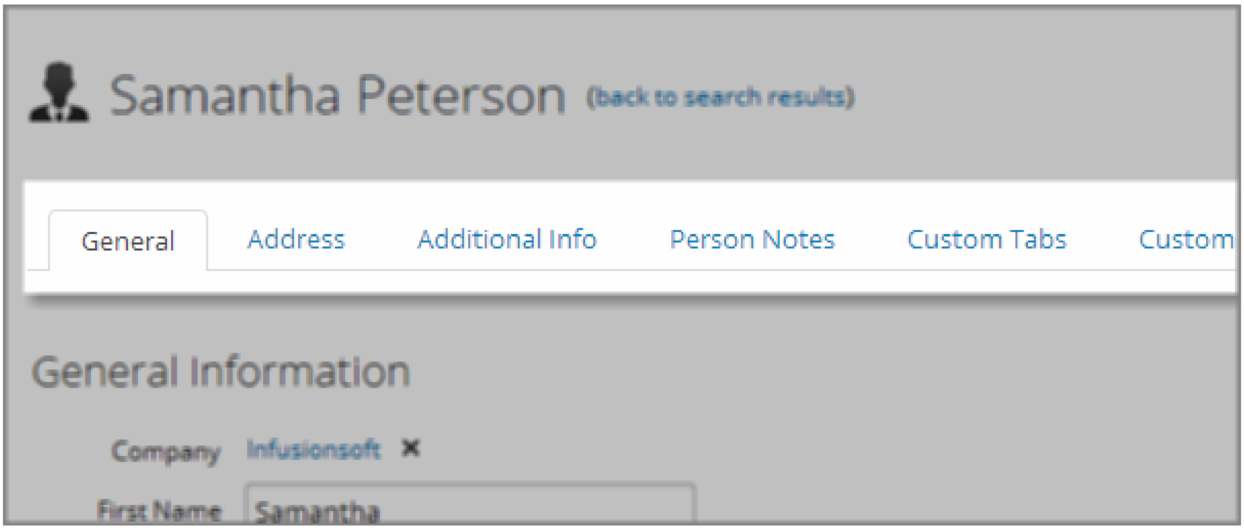
Contact Record Overview

Last Modified on 07/23/2018 12:18 pm MST

Pro-Tip! You won't be able to customize what standard fields appear on contact records. In New Infusionsoft, only fields that have data will be shown when viewing the contact record.

The Top Row of Tabs

The **top row** of tabs stores general contact information and specific details about the contact, like street address, birth date, and more. These details are stored in the default Infusionsoft fields and in custom fields you create for your specific business needs. The standard and custom field information is added and updated either manually by one of your Infusionsoft users, or automatically through a web form or online purchase.



- **General:** It stores the most pertinent contact information: company, job title, phone number, email address, website, and local weather. It also displays a tag summary. There is an envelope icon that opens the email client so you can quickly send a personal email.

- **Address:** You may have more than one address for each contact. The primary address (billing address) is stored in the general tab. You can store up to two more addresses within the address tab.

- **Additional Info:** This tab contains fields for additional phone numbers, birthday, spouse name, etc.

- **Person Notes:** This is a text box where you can add notes about a person that do not need to be date/time stamped.

- **Custom Fields:** You may have many custom tabs; each labeled with a different custom label (in other words, none of them may actually say "custom fields".)

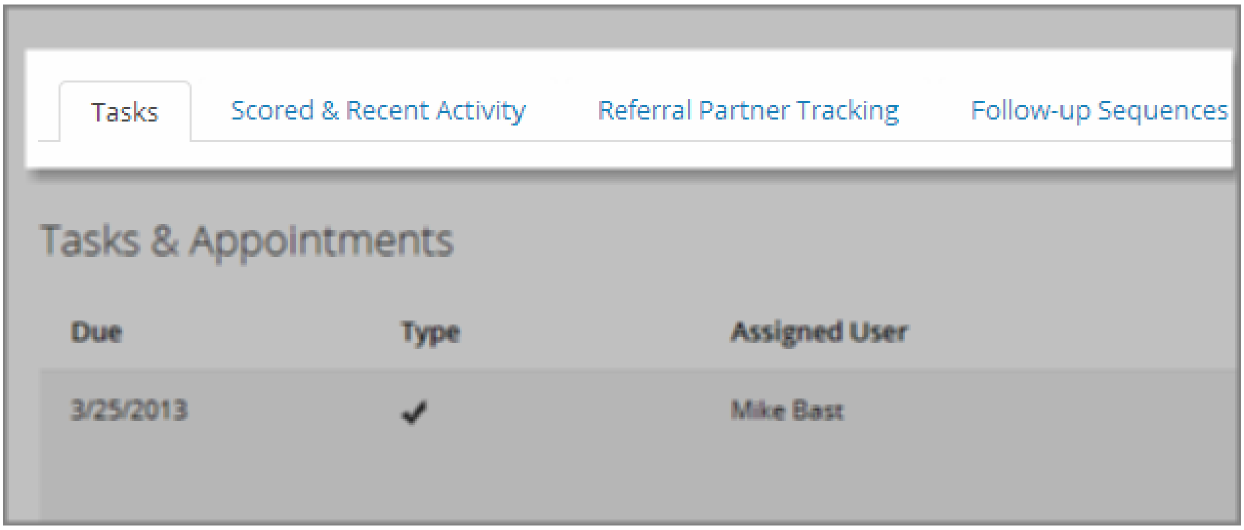
- **Tag:** The tag tab lists the tags applied to this contact record. You can also manually add or remove tags from the contact record. Choose a tag from one of the drop-downs or create a new tag.

- **Linked Contacts:** This tab displays relationships you've established between contacts in your system by linking them together and allows you to create new links (e.g. links between family members.)

- **Access Privileges:** This tab allows a user to share access to a contact record with other users or user groups / teams.

The Bottom Row of Tabs

The **bottom row** of tabs stores activity history like pending tasks or appointments, email correspondence, automated follow up, notes, and transactions.



- **Tasks:** The Tasks tab displays pending and completed tasks, a dates stamped note history, web form submissions, email correspondence and click history, etc. You can also add new tasks, appointments, notes, and send emails from here.

- **Scored & Recent Activity**: This tab displays all of the recent activity recorded within Infusionsoft. It also houses all activity related to lead scoring.

- Referral Partner Tracking: This section shows if a referral partner is involved with this contact. You can add a referral partner manually while viewing the record, too.

- **Follow-Up Sequences:** This tab shows the contact's follow-up sequence history. The sequences that are active, paused, and / or completed. Most of the time follow-up sequences are automated and require little to no intervention, but you can manually manage sequences from here when needed.

- **Campaigns:** This tab displays campaign sequence activity. The recent history shows up to 25 completed campaign items that occurred within the last 30 days. The upcoming campaign items section shows the sequence items that will take place in the near future.

- **Opportunities:** If your system includes the opportunity component, this tab will store a history of sales interactions, both active and closed.

- **Orders:** If you are processing orders through Infusionsoft, this tab will house the purchase history. You can also manually manage orders, payments, refunds, and invoices from here.

- **Web Profile:** This is a comprehensive view of this contact's web interactions with you, including any site where the tracking code is in place.

- **File Box:** Use Infusionsoft for online document storage by uploading contracts, estimates, questionnaires, and more to an individual's file box.

Pro-Tip! Does your screen look different? If your unable to view certain tabs in the contact record, it is likely due to not having the appropriate permissions to view that object. If you are not an admin and can't configure your own permissions, ask someone who has admin access to modify your permissions for you.

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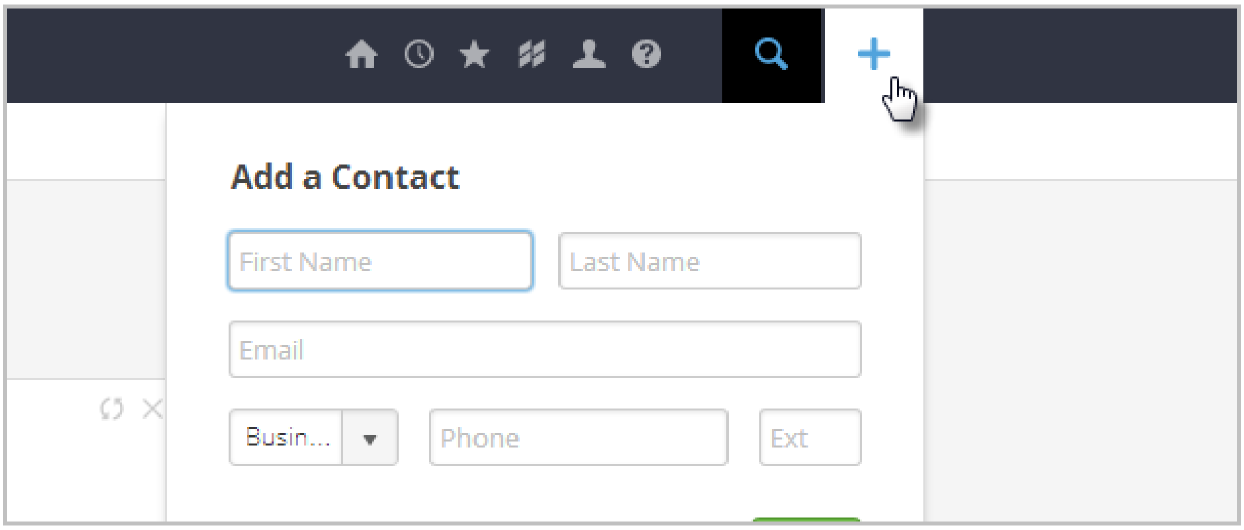
Create a Contact Record

Last Modified on 07/23/2018 12:21 pm MST

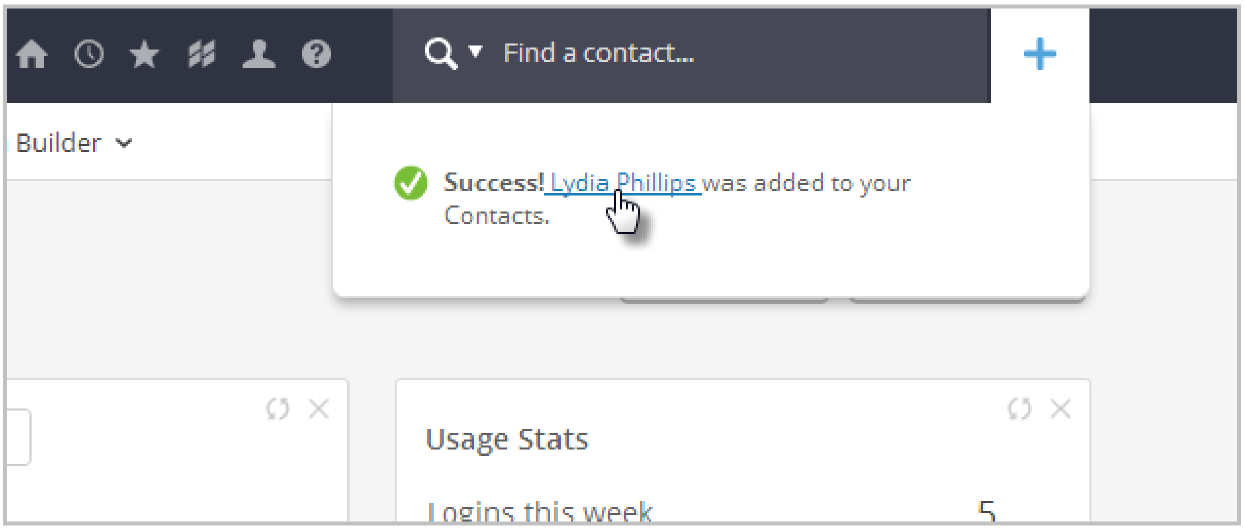
Manually Add a New Contact to Infusionsoft

1. Click on the (+) icon at the top right of any page inside of Infusionsoft. This "Quick-Add" feature is the fastest and most convenient way to manually create a contact in Infusionsoft.



2. Simply enter the contact information and click the **Save** button.

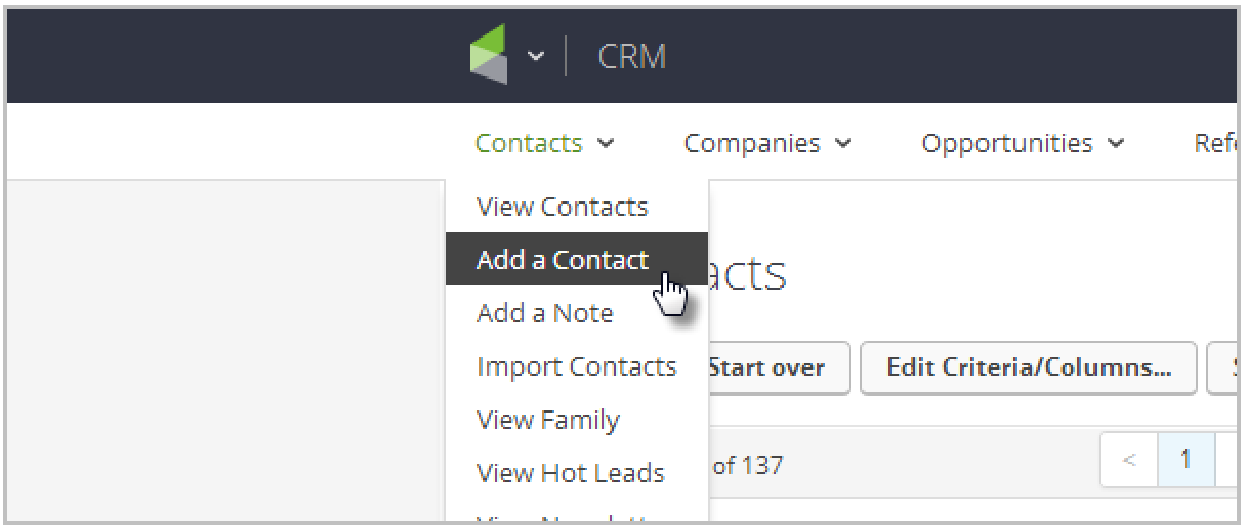
3. Now, just click on the link to go to navigate to the contact record.



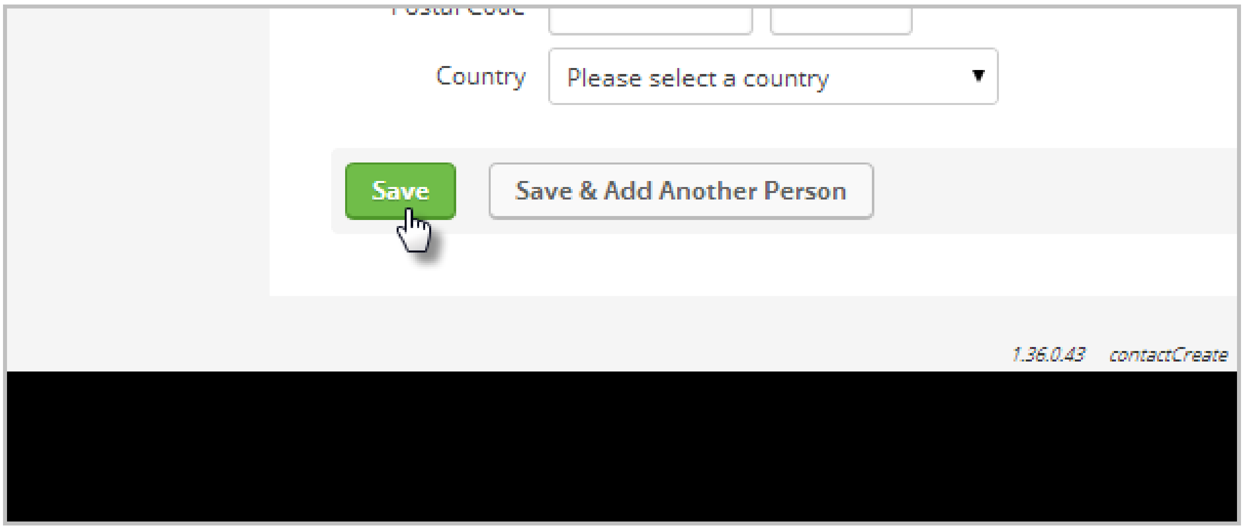
An Alternative Method is the following:

1. Go to **CRM** > **Contacts** in the main nav

2. Select **Add a Contact** from the Contacts drop-down.

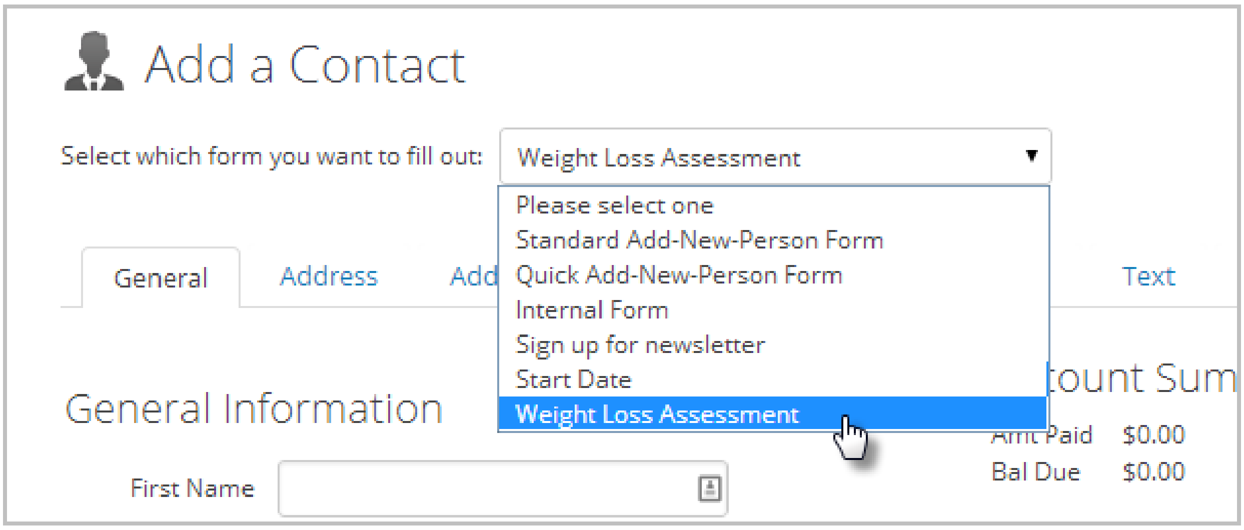


3. Enter the contact's information, and then click on the **Save** button to view the new contact record, or click **Save & Add Another Person** to refresh the form so you can quickly add another contact.



Add a Contact With an Internal Form

You can select an internal form from the drop-down at the top of the contact record entry page.



- **Quick Add-New-Person Form**: This is the short form. You can customize the fields that appear on this form by going to **CRM** > **Settings** and scrolling down to the bottom of the page.

- **Standard Add-New-Person Form**: This is the default contact entry form and cannot be changed.

- **Custom Internal Forms:** Internal Forms also show up in this drop-down. These internal forms are created in the campaign builder. When an internal form is used to add a contact, it has the added benefit of initiating campaign automation (starting a campaign sequence). Internal Forms are a powerful business automation tool.

Using a different version of Infusionsoft? Click Here to learn more

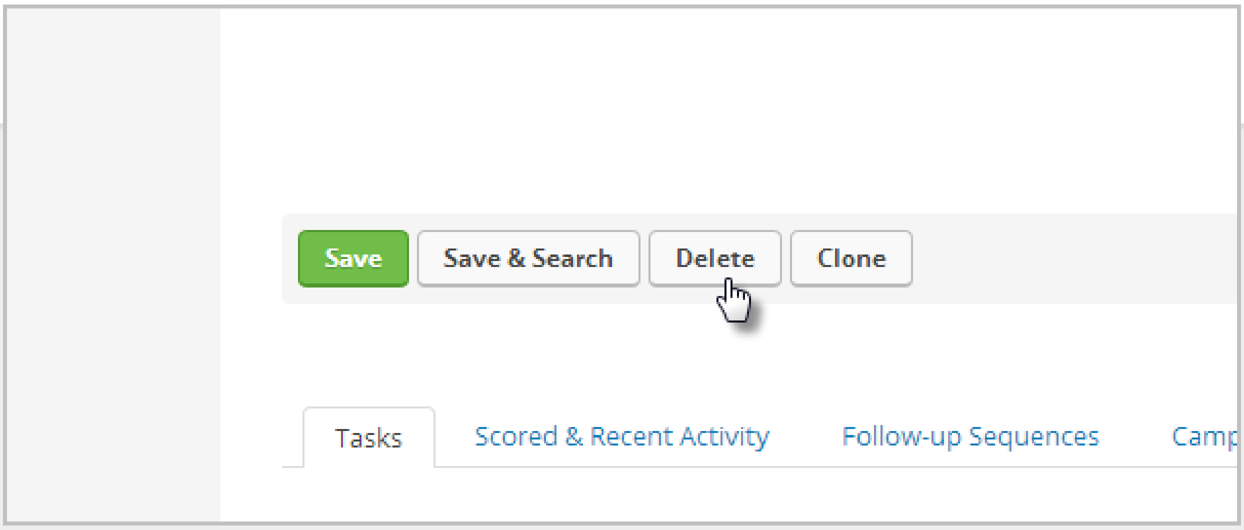
Delete a Contact Record

Last Modified on 07/23/2018 12:22 pm MST

Delete a Contact Record

Pro-Tip! If you do not see a Delete button, you don't have permission to delete the contact record.

1. Navigate the contact record you wish to delete
2. Click the **Delete** button.



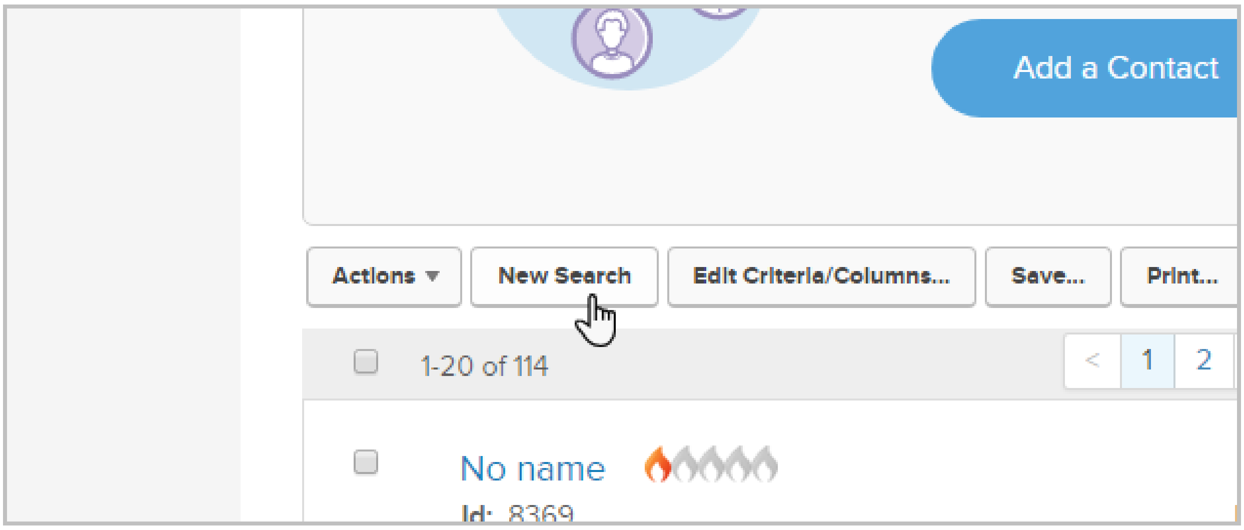
Export Contacts From Infusionsoft

Last Modified on 07/23/2018 12:22 pm MST

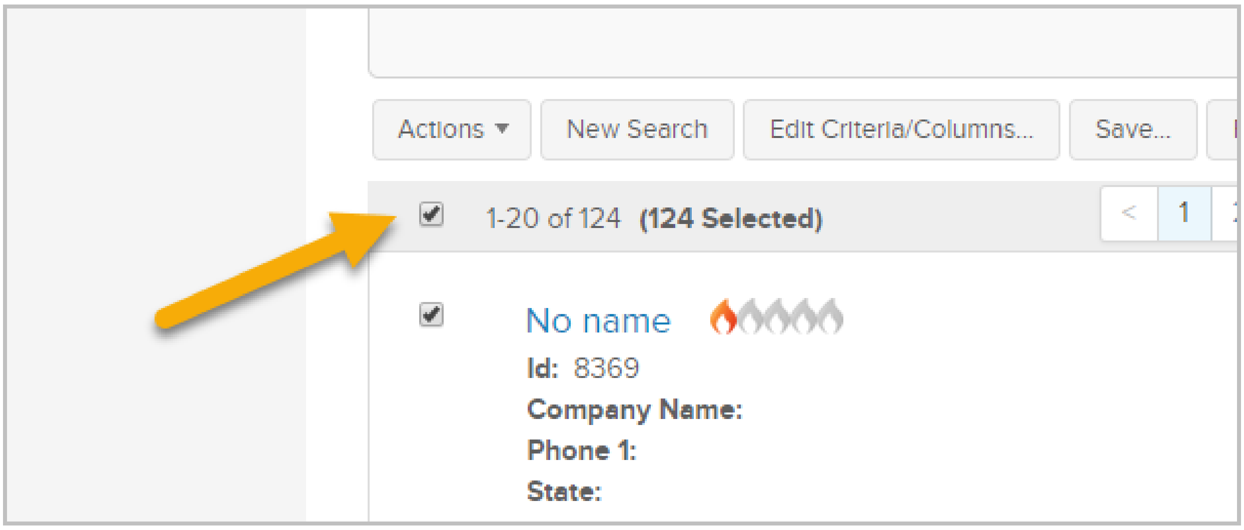
If your user permissions allow , you are able to export contacts and other types of data from Infusionsoft. The data will be exported in CSV file format. The example below shows how to export a contact list. You can use the same steps to export referral partners, opportunities, orders, and various reports from Infusionsoft.

1. Go to **CRM** > **Contacts** in the main navigation menu to start exporting your contacts. Note that you can also export filtered search results and reports.

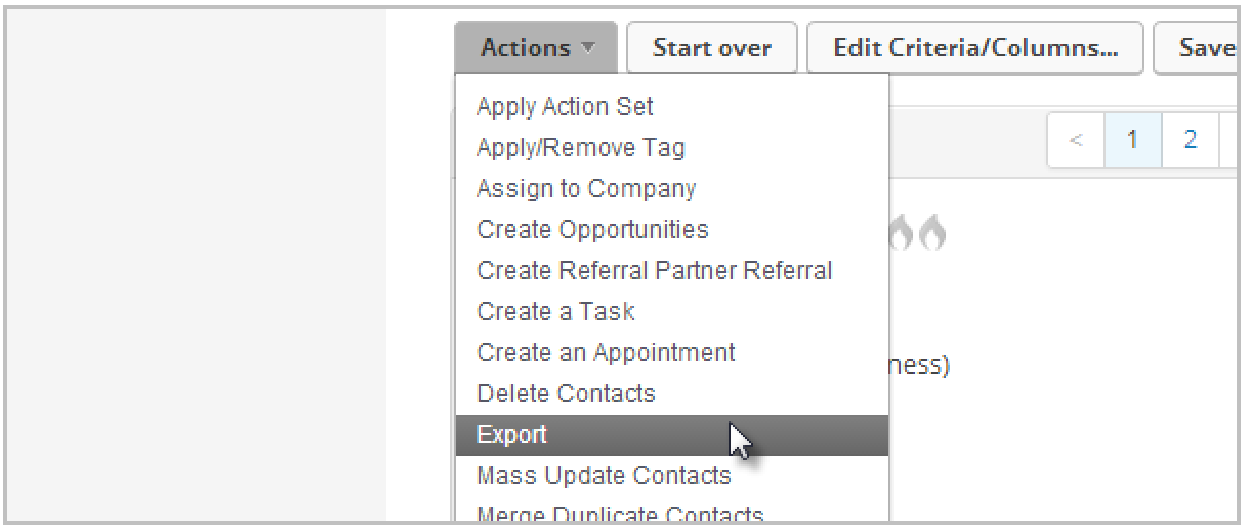
2. Select a saved search from the drop-down, or click on **New Search** to enter new search criteria.



3. Select the contacts that you want to export. If exporting all search results, check the **Select All** box at the top of the list



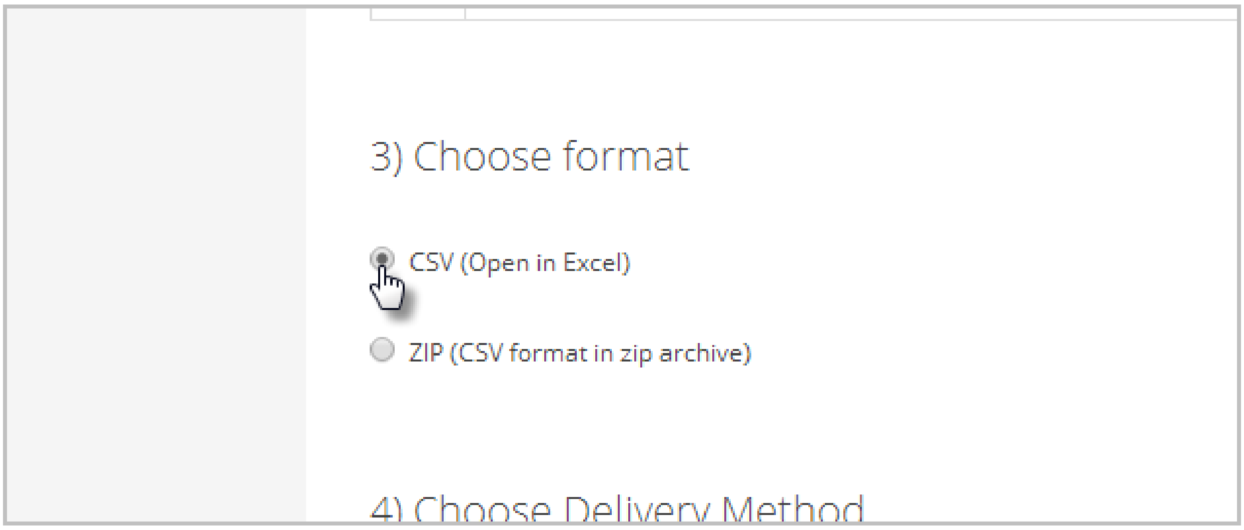
4. Click on the **Actions** button and select **Export**



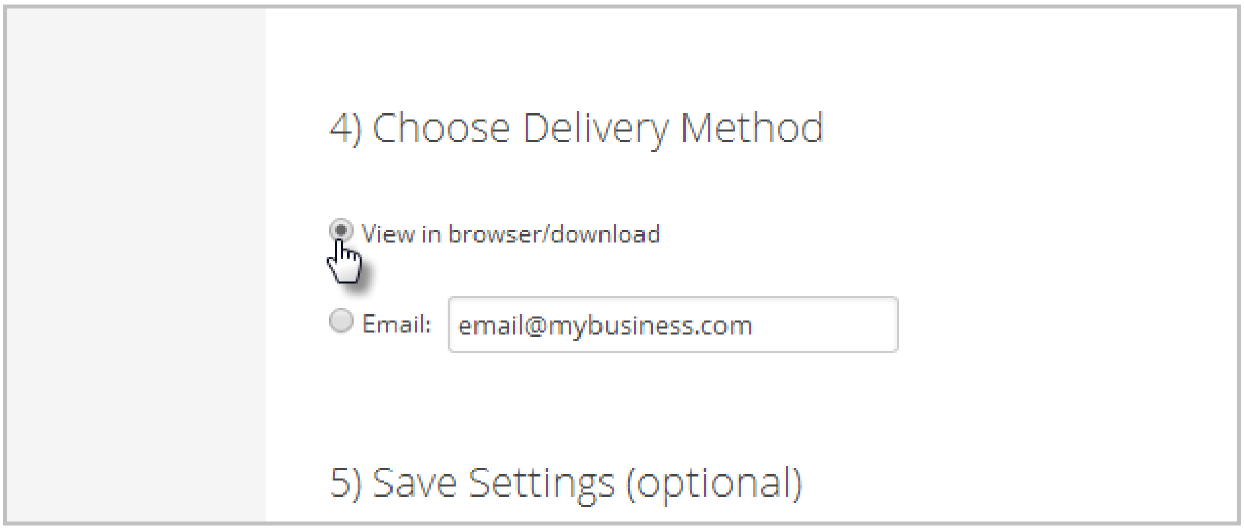
5. Mark the check-boxes beside the fields you want to export. If you are exporting your list

to do an update import , you must include the ID field

6. Scroll down and choose a file format for the export: *csv* or *zip*

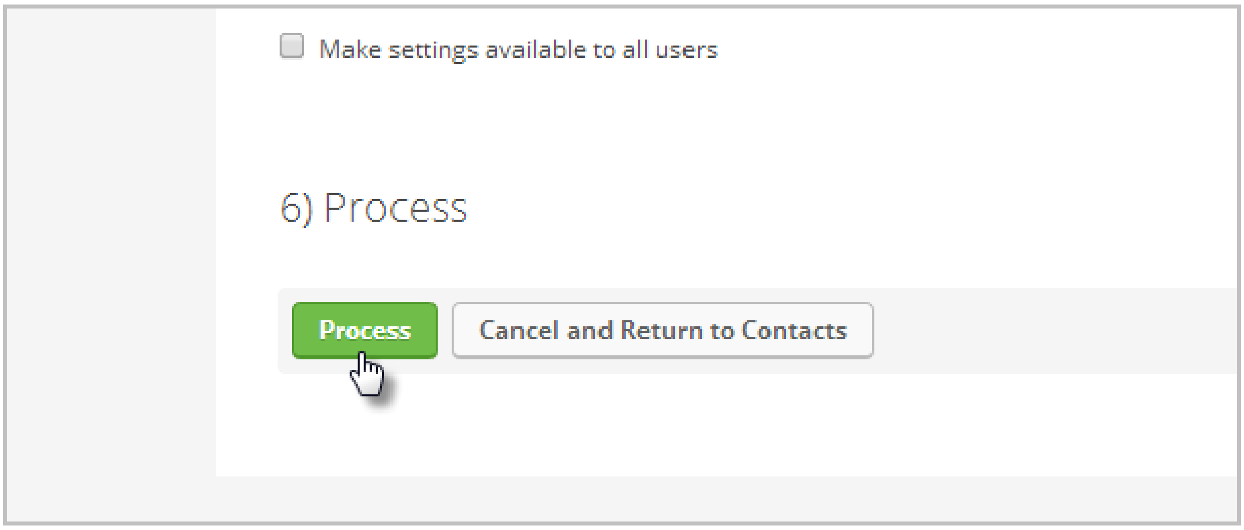


7. Select the method of delivery: **View/download the file** or **Email it to a specific address**



8. (Optional) Save the export field settings to use with future exports. Enter a name and mark the check box if all users need to access the saved export settings. You will be able to select the saved export settings next time you export data by clicking on the **Choose Saved Export** drop-down instead of selecting individual fields.

9. Click **Process** and then click on **Okay** to continue. Save the *csv* file to your computer or locate it in your email inbox



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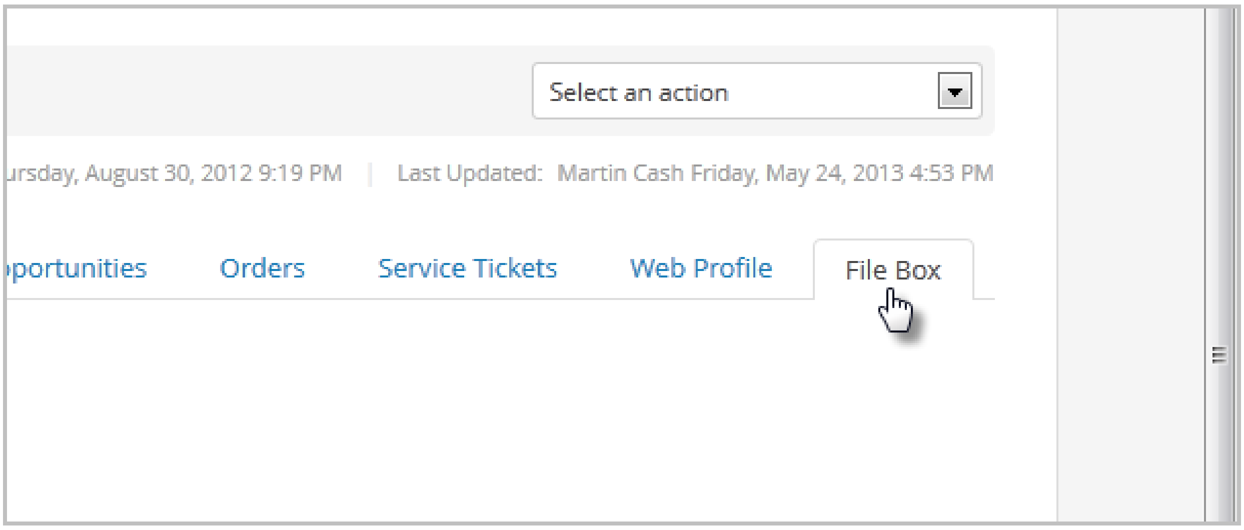
Store Files On A Contact Record

Last Modified on 07/23/2018 12:40 pm MST

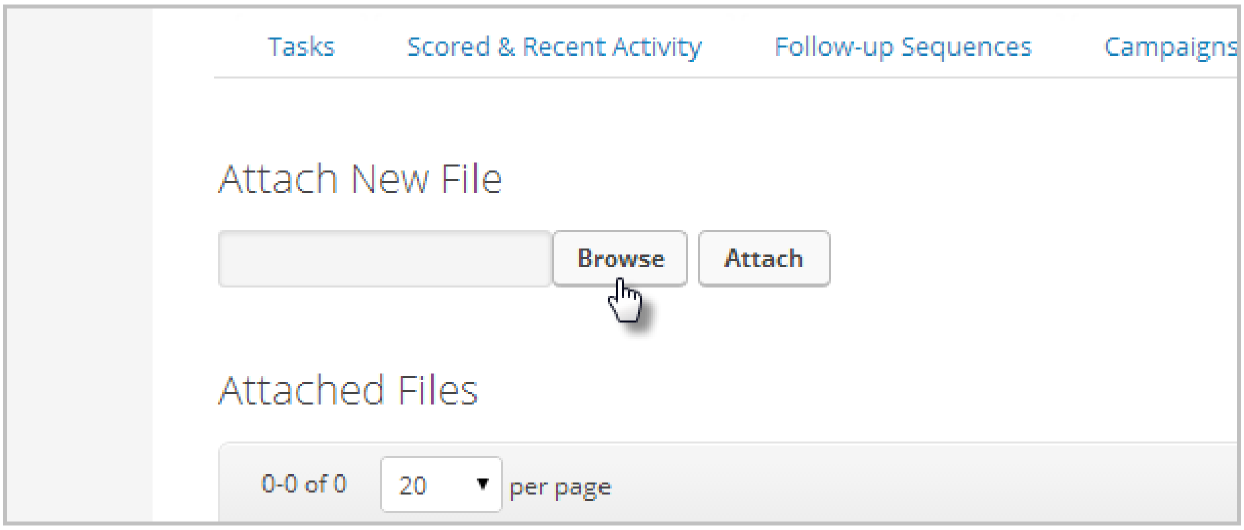
Each contact record has a file box where you can store contracts, spec sheets, proposals, and more. You can store any file that is under 10 MB in size. The files are date stamped and hyperlinked so that you can retrieve them easily while viewing the contact record.

Pro-Tip! If you are looking to do something outside of simply uploading and storing files to the filebox, ask the Infusionsoft Community about popular filebox integrations.

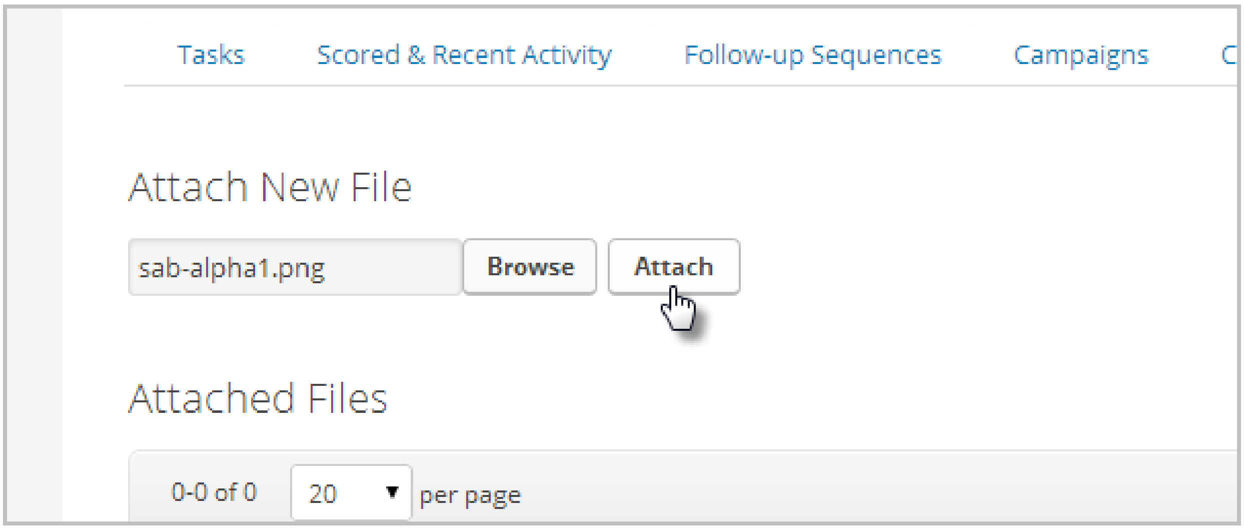
1. On the contact record, Click on the **File Box** tab located in the bottom row of tabs



2. Click on **Browse** to find a file on your computer.



3. Click **Attach** to upload the file to the contact's file box.



You can view, delete, or rename files stored in the file box. If you need to update an existing file, make sure it has the same file name and file type (.doc, .xls, etc.) as the older version. When you upload the replacement file, Infusionsoft will ask you if you want to create a new file or replace the existing one.

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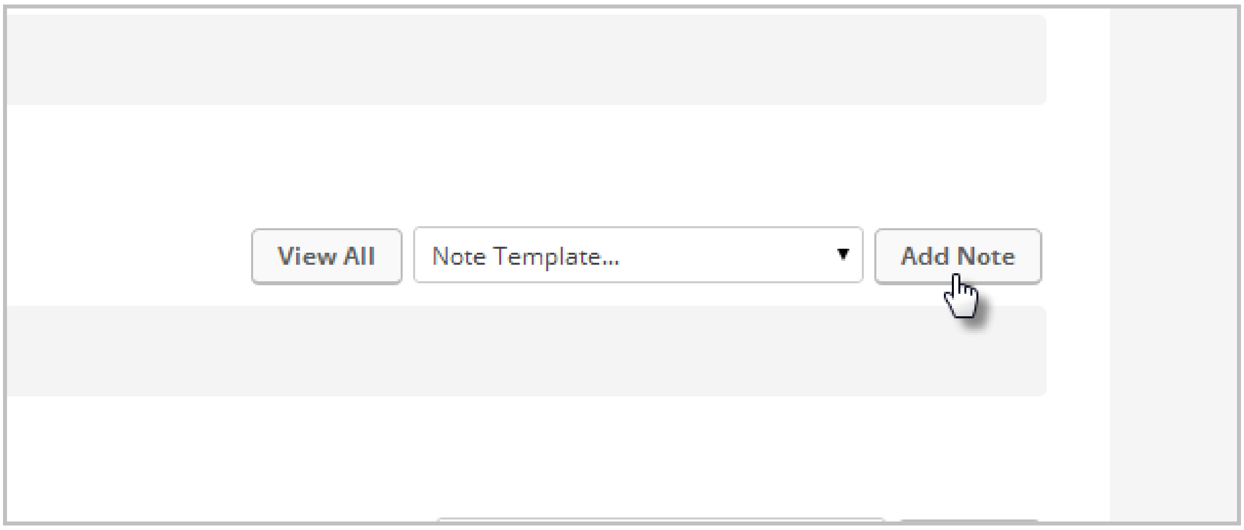
Add a Note to a Contact Record

Last Modified on 07/23/2018 12:46 pm MST

1. Navigate to the Contact Record

2. Go to the Notes section and click on the **Add Note** button.



   - (Optional) **Assign to different user**: Select a user from the drop-down to associate someone else with the note (if your user permissions allow).
   - (Optional) **Template**: This drop-down list includes pre-populated note templates.
   - (Optional) **Type**: Select a type that describes the interaction you're recording (i.e. Call, Email, etc.). Note: You can modify this list through **CRM** > **Settings** > **Task/Appt/Note Settings** (if your user permissions allow.)
   - **Subject**: Enter a subject line for the note. The subject is visible in the contact history; it should be a short description of the interaction.
   - **Details**: Enter or customize the notes. This is a more detailed description of the interaction.
   - (Optional) **Notify**: Select one or more users to send them a copy of the note by email.

3. Click on the **Save** button to record the note in the contact record.

Pro-Tip: You can also use note templates to record repetitive interactions. Note templates can also trigger automation in Infusionsoft. They can help you work more efficiently and reduce the possibility of errors.

Important Note: Your user permissions may not allow you to delete a note from a contact history. The Can edit all records permission needs to be set correctly.

Using a different version of Infusionsoft? Click Here to learn more

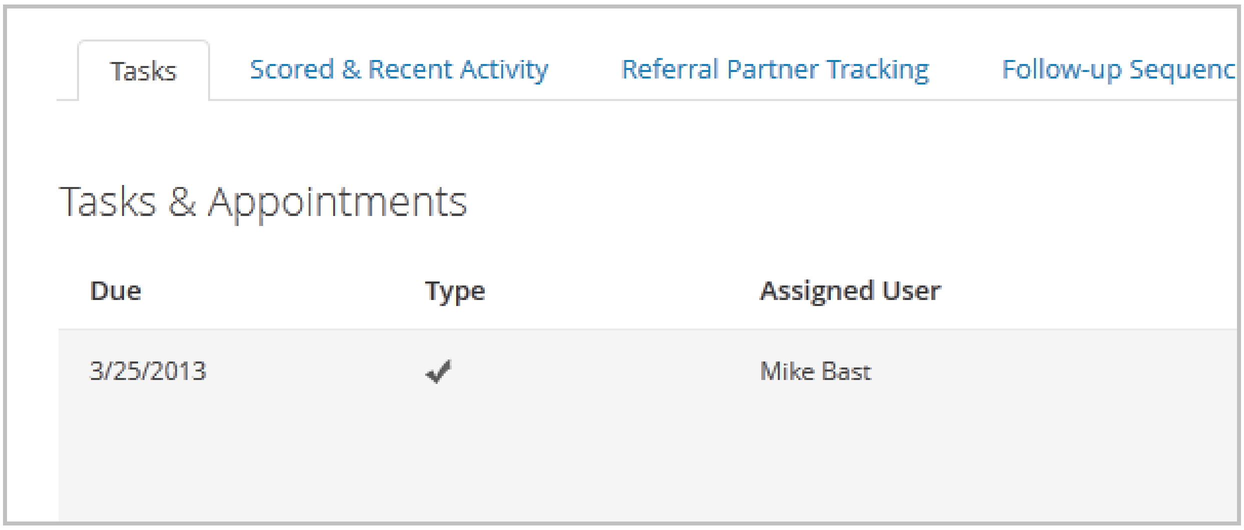
Contact Communication History

Last Modified on 07/23/2018 12:46 pm MST

Infusionsoft keeps a consolidated record of user and system communications like emails, notes, tasks, appointments, and follow-up sequences. These interactions are date stamped and archived within the contact record. Communication history is accessible to all users who have permission to view or edit the contact record. Just click the **Tasks** tab (if necessary) to view this information.

Tasks & Appointments

This section displays tasks and appointments that have not been completed. You can also add a new task or appointment in this section.



Completed Tasks

This section shows all previously completed tasks for this contact.

Previous Appointments

This section shows all previous appointments for this contact.

Notes

This section displays the most recent notes and includes notes added by users and notes added automatically by Infusionsoft. Click on **View all Notes** to view the full note history. You can also add a note in this section.

Notes

Updated	Assigned User	Details
06/17/2013	Colton Leavitt	Sell product bought a prod
05/16/2013	Mike Bast	Spoke on the [No Notes]

Form Submissions

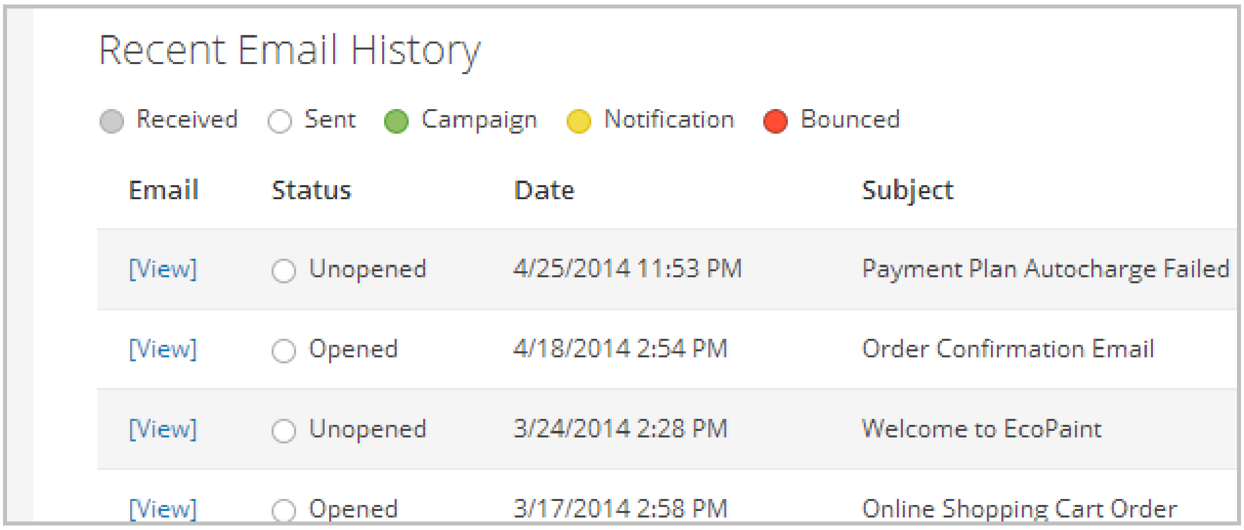
This section will display any web forms or landing pages that have been submitted by the contact.

Form Submissions

Date	Form	Referring URL
3/24/2014	Request information	https://martyc.infusionsoft.com/a
3/14/2014	Request information	https://martyc.infusionsoft.com/a
3/14/2014	Request information	https://martyc.infusionsoft.com/a
11/9/2012	Request information	https://martyc.infusionsoft.com/a

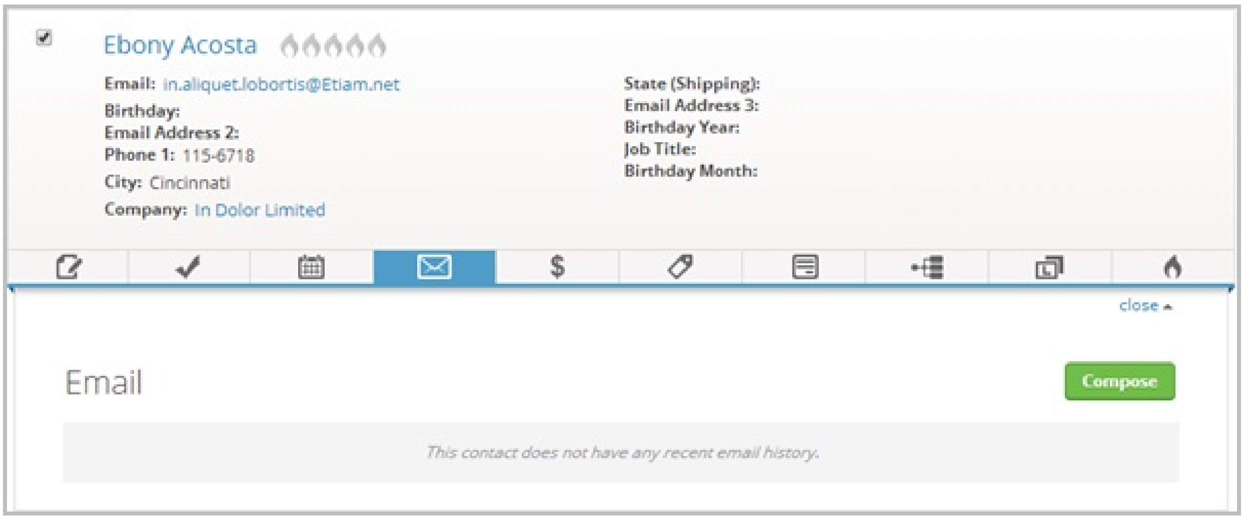
Recent Email History

- Incoming emails that have been retrieved through the Infusionsoft email client or manually recorded with Sync for Outlook or Sync for Gmail.
- Outgoing emails and replies sent through Infusionsoft or manually recorded with Sync for Outlook or Sync for Gmail.
- Outgoing emails generated by Infusionsoft through broadcasts or follow-up sequences.



Interactive View

You can also view this information when viewing results in interactive view. Just click on the icons below the contact.



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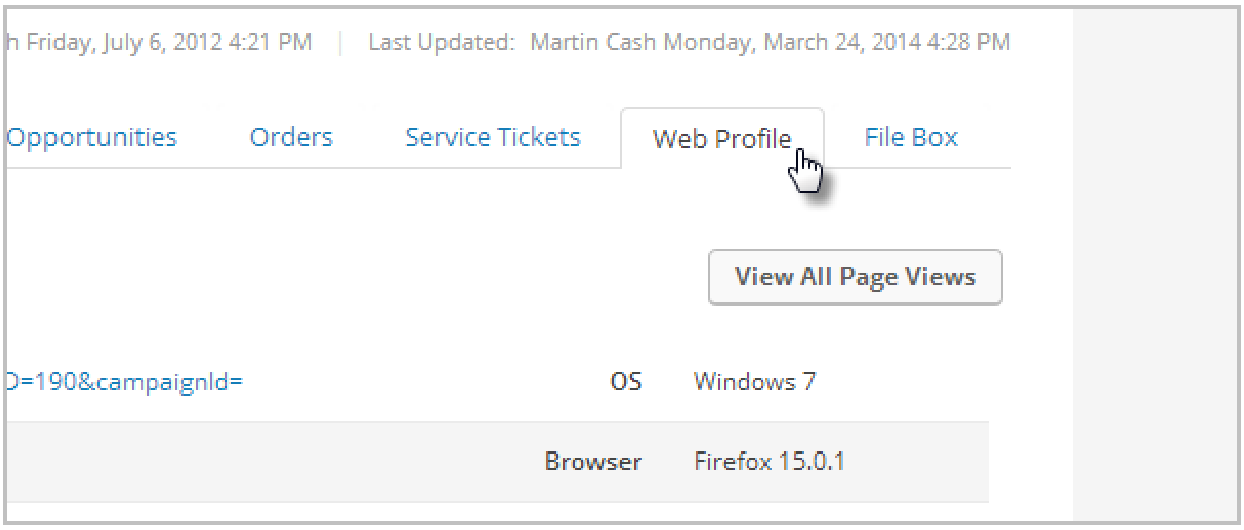
Web Profile

Last Modified on 07/23/2018 12:47 pm MST

The web profile is an aggregated history of web activity stored within a contact record. You can use this information to get a snapshot of prospect and customer interests and concerns before a personal interaction. It provides details that help you personalize the conversations with the contact. For example, you can also use this information to gauge their current interest level based on their most recent online activity. The web profile is automatically generated when:

- A contact is created through an Infusionsoft web form, landing page , order form, or via the shopping cart
- An existing contact clicks on a link in an email

1. While viewing the contact record, click on the **Web Profile** tab



The Web Profile Includes:

- Original referral URL and lead source
- Screen resolution
- Date of last visit
- System and browser information
- Date the web profile was generated

- Date stamped online activity, including clickable page URLs and time on page. The last 10 page-visits are displayed by default. Click on the **View All Page Views** to see a complete history.

View Date	URL
Nov 15, 2012 12:31 PM	https://martyc.infusionsoft.com/app/page/na54
Nov 15, 2012 12:31 PM	https://martyc.infusionsoft.com/app/page/na54
Nov 9, 2012 12:56 PM	https://martyc.infusionsoft.com/app/form/na52
Nov 9, 2012 12:42 PM	https://martyc.infusionsoft.com/app/form/na52
Nov 9, 2012 12:42 PM	https://martyc.infusionsoft.com/app/form/na52
[illegible]	[illegible]

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Restore Deleted Contacts and Other Data

Last Modified on 07/23/2018 12:47 pm MST

Infusionsoft may be able to restore contact records or other data in your application that has been deleted or altered.

Infusionsoft regularly performs backups. These backups are kept for 90 days, meaning items listed below that are deleted or altered within the last 90 days will be able to be restored. (Please see the list below of what can and cannot be restored)

There may be a fee associated with the restore depending on the data/content that needs to be retrieved.

Data restores can take between 3-5 business days. Timing is dependent upon the complexity and amount of data requested to be restored.

In order to request a restore, please be prepared to share the following information. This will be used to perform the requested data restore.

- What records needs to be restored? (Contacts, Campaigns, Opportunities, Tags, etc)
- What fields need to be restored?
- How was the data deleted? (e.g. Ran action to delete list, clicked “delete” button within record, etc.)
- When was the data altered/deleted?

Have an authorized user who is able to approve account charges call or chat into Infusionsoft Support

We will need to verify that the user requesting the restore is an authorized user who is able to approve account charges

Please Note! Any fee quoted by the support team is an estimate. If it is determined that the restore services will require any additional costs, a representative will reach out to you for approval before any restoration is completed.

Able to Restore	Unable to Restore
Contact Records	Legacy Templates
Merged Records	Email Templates
Campaigns	Contacts within campaigns
Tasks/Appointments/Notes	Legacy Order Forms
Company Records	Legacy Shopping Cart
Opportunities	Web Forms
Referral Partners	Landing Pages
Orders	
Subscriptions	
Products	
Tags (that were applied to a contact)	
Tags (that were edited/deleted from the app)	
Shipping Options	

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Create and Apply a Stand Alone Note Template

Last Modified on 07/23/2018 12:48 pm MST

A note template is used to record a personal interaction or event related to an individual contact record. Note templates save time by reducing or eliminating manual follow-up changes, and can prevent user errors and omissions. Note templates can also be used to initiate automation in Infusionsoft.

Pro-Tip! A standalone note template is not tied to automation. For that, you will need to use the campaign builder to configure campaign note templates . This article will focus on how to create a **Standalone Note Template** type and how to apply it to a contact record.

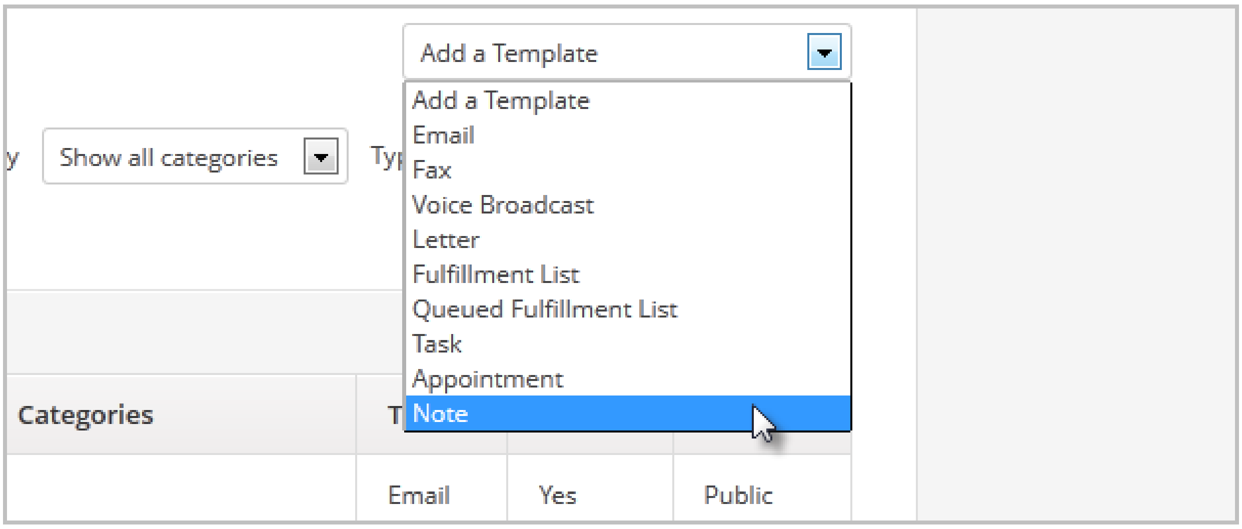
There are three types of note templates:

- **Campaign Goal Note Template**: This is the more common type of note template and is set up in the campaign builder. When this type of note template is applied to a contact, campaign automation begins; it is defined as a Goal in the campaign builder.
- **Campaign Sequence Note Template**: This type of note template is also configured in the Campaign Builder. Unlike a campaign goal note template, this type of template does not initiate automation; it simply automatically adds a note to the contact record as part of a campaign sequence.
- **Standalone Note Template**: This type of note template is not built using the campaign builder; therefore it does not kick-off campaign automation when applied to a contact record.

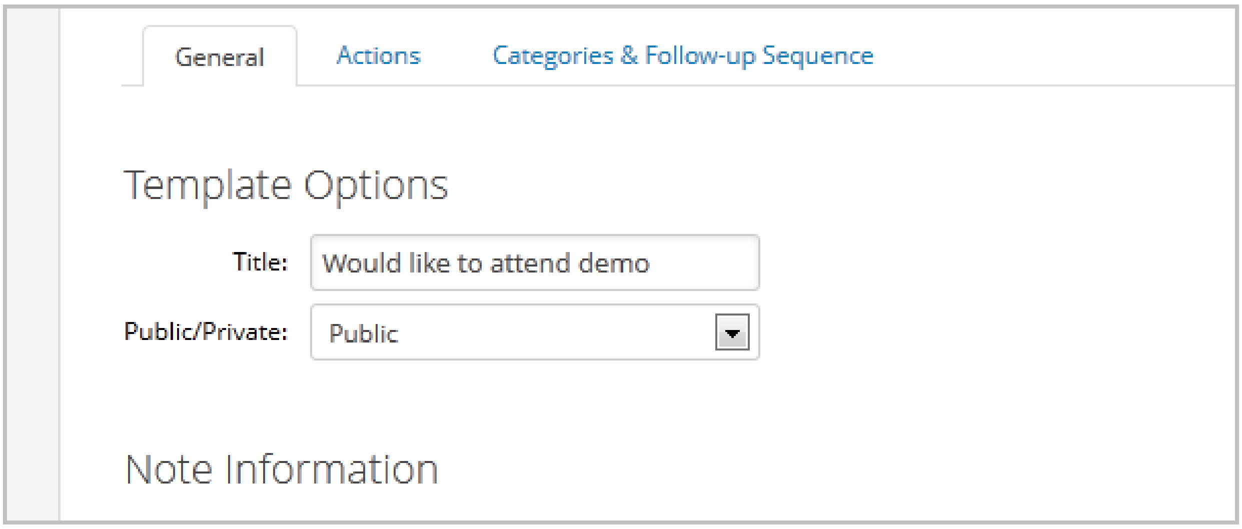
Set Up a Note Template

1. Go to **Marketing** > **Templates** in the main navigation menu

2. In the Add a Template drop-down, select **Note**

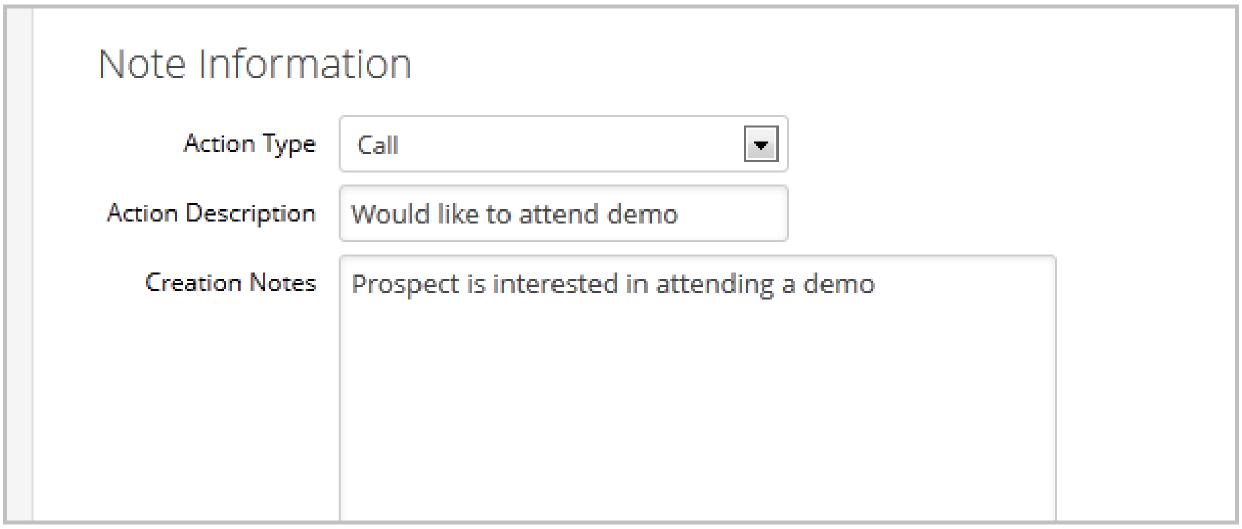


3. Enter a title for the note template Note: The title is used to identify a note template in various lists throughout the system. It should be short and descriptive.



4. Choose a privacy option
    - **Public**: Choose this to make the template accessible to other Infusionsoft users.
    - **Private**: Choose this if you want to hide this template from other Infusionsoft users.

5. Enter the body of the Note



- (Optional) **Action Type**: Select a note type from the drop-down (e.g. Call, Email). You can customize these options by going to **CRM > Settings > Task/Appt/Note Settings**.
- **Action Description**: Enter a brief action description. The description should summarize the nature of the interaction or event (e.g. *Qualifying Call - Voice Message 1*). It will show up in the note history within a contact record.
- **Creation Notes**: Enter general notes that further describe the interaction or event. Users can individualize the note when they apply the note template to the contact record.
- (Optional) **User ID**: "Logged In User" is the default. This means that Infusionsoft will attribute this note to the user who logs into Infusionsoft and adds the note to a contact record. Select an individual user if the note template should always be attributed to one specific user instead of the "logged in" user.
- (Optional) **Notify these Users**: Select user(s) who need to know when this note is used. These users will receive an email notification when the note is applied.
- (Optional) **Send Notify as BCC**: Mark this check box if you do not want each notified user to see all of the users who are notified.

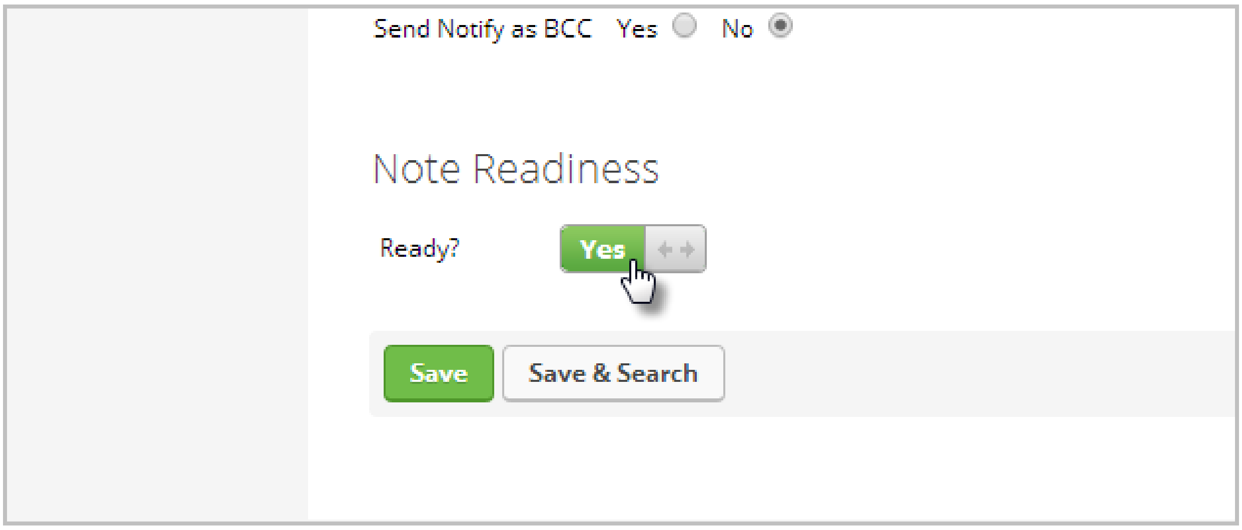
6. (Optional) Click on the **Actions** tab to add one or more action to the note template

7. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to help you organize and filter templates in Infusionsoft.

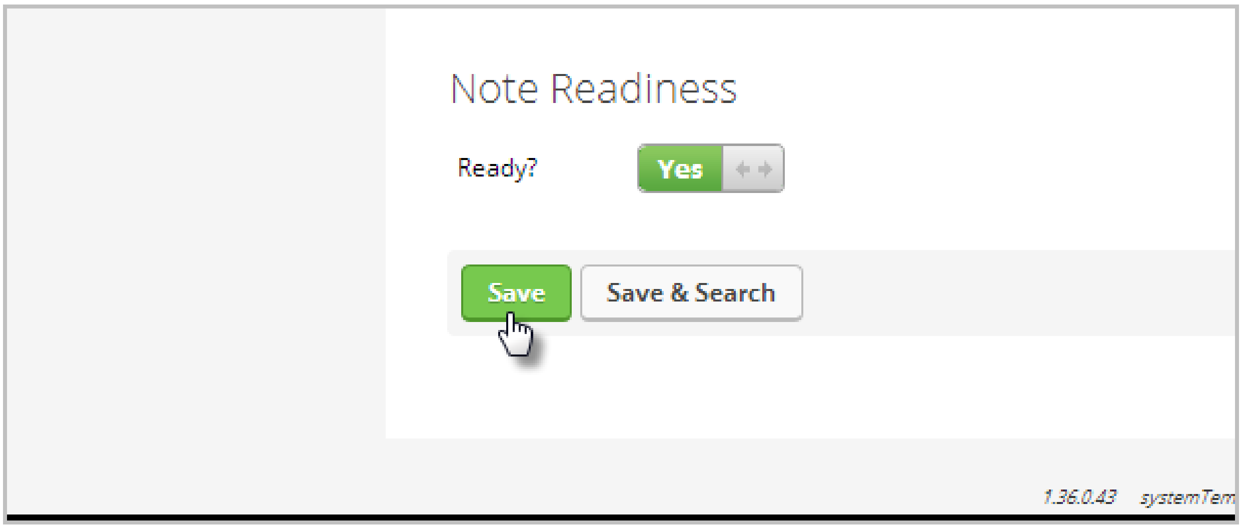
8. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template.This is not commonly used with note templates, but can include the cost of materials and labor related to the note event or interaction.

9. While on the **General** tab, mark the note as ready. Notes that are not marked as ready

are not available to users.

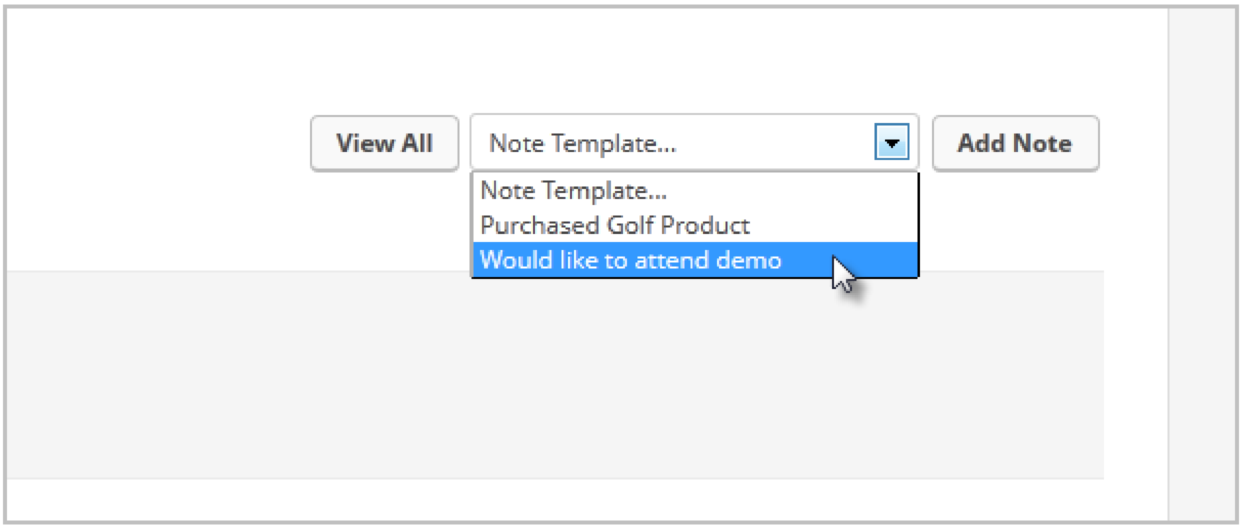


10. Click on **Save** button to create the note template



To apply a note template

Open the contact record, scroll down to the Notes section, and select the note template from the drop-down. After you select your note template and click **Add Note**, the note will be applied.


View All
Note Template...
Add Note
Note Template...
Purchased Golf Product
Would like to attend demo

Using a different version of Infusionsoft? Click Here to learn more

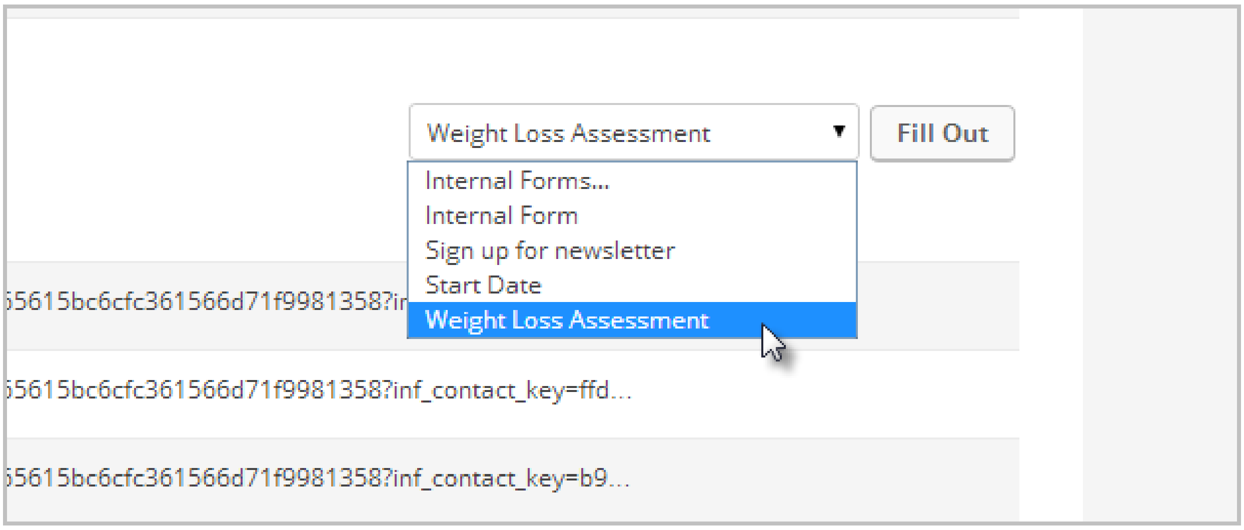
Submit An Internal Form For An Existing Contact

Last Modified on 07/23/2018 12:48 pm MST

An internal form gives you the ability to submit a form on behalf of an existing contact. Internal forms help automate internal workflows.

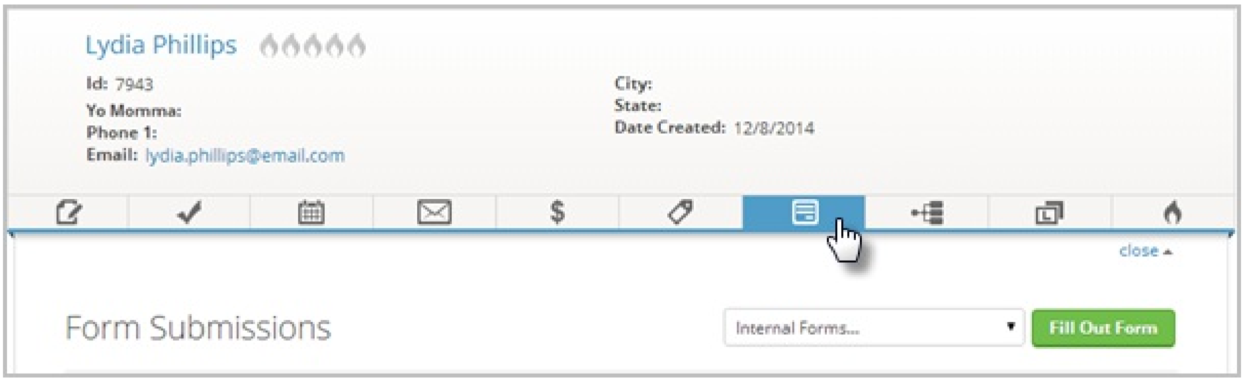
Pro-Tip! Click here if you are looking to learn how to set up an internal form in the campaign builder.

1. After finding the contact, scroll down to the **Internal Form Submissions** section, select the form you would like to use from the drop-down, and click the **Fill Out** button



2. The current contact information will populate the form. Enter or update the information in the form, and then click on **Save** to apply the update

3. Or While in Interactive List View, just click the **Internal Form** icon



Using a different version of Infusionsoft? Click Here to learn more

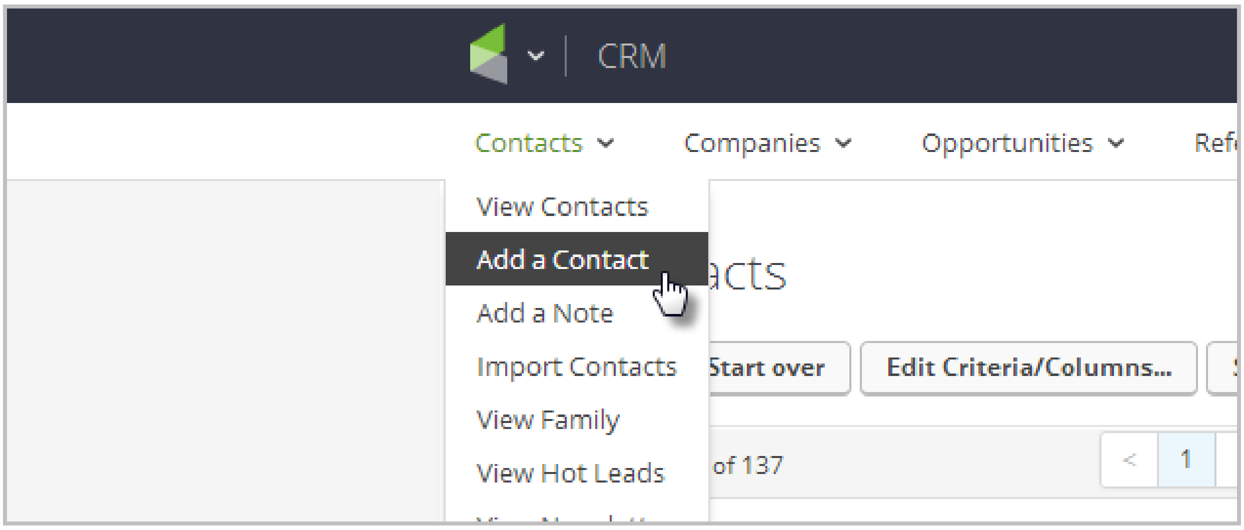
Add A New Contact With An Internal Form

Last Modified on 07/23/2018 12:49 pm MST

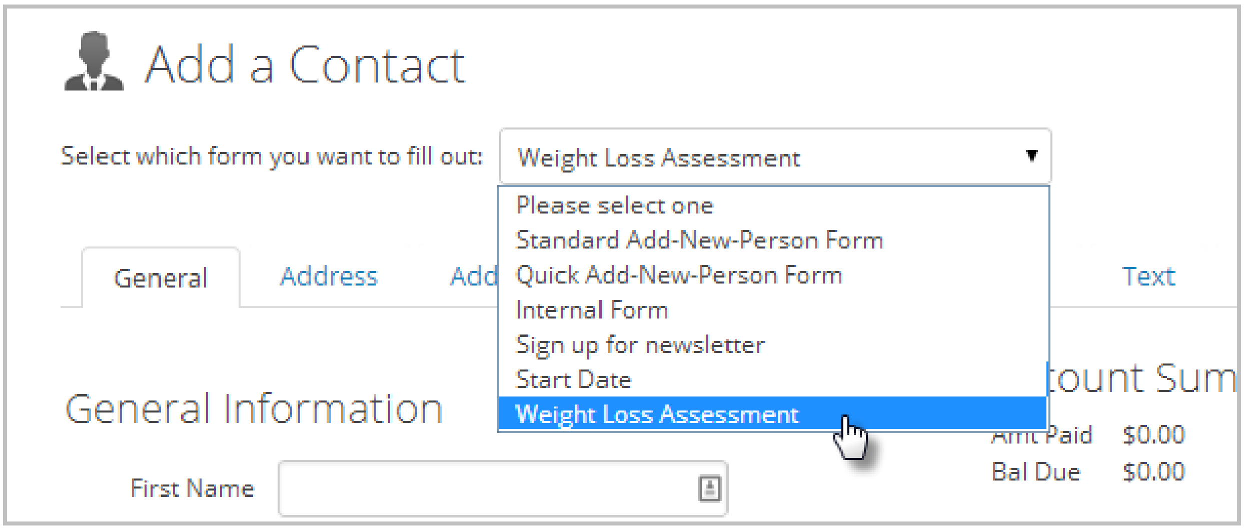
Pro-Tip! Click here if you are looking to learn how to set up an internal form in the campaign builder.

1. Go to **CRM** > **Contacts** in the main navigation menu

2. Hover over **Contacts** and select **Add a Contact**



3. At the top of the contact creation page, select the internal form you would like to use



4. Fill out the form and click Save **or click** Save & Add Another Person **to create more contacts using the form**

Using a different version of Infusionsoft? Click Here to learn more

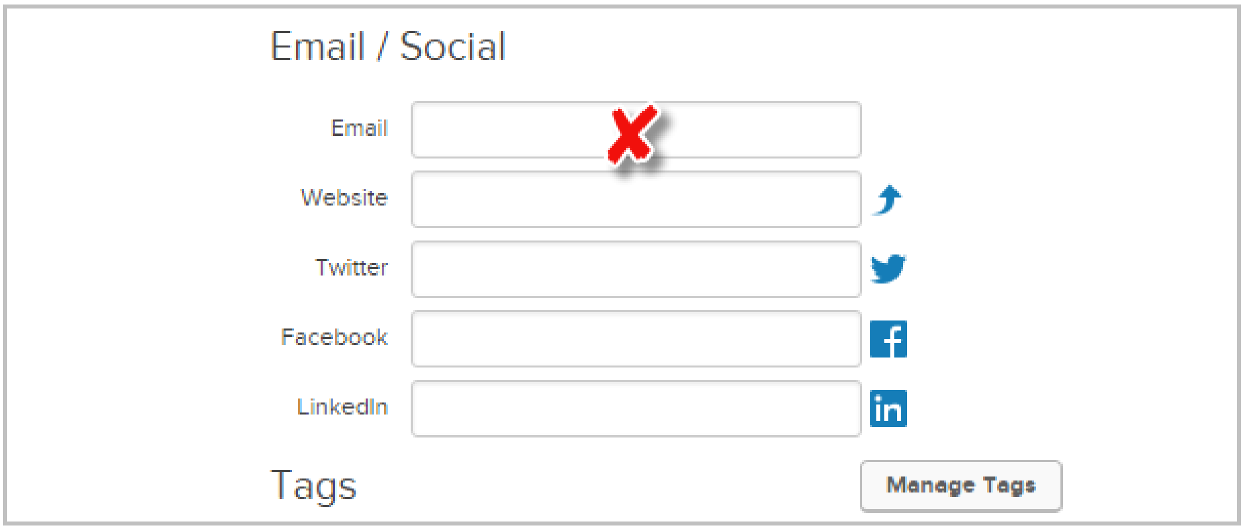
Why Did My Contact Not Receive An Email

Last Modified on 07/23/2018 12:50 pm MST

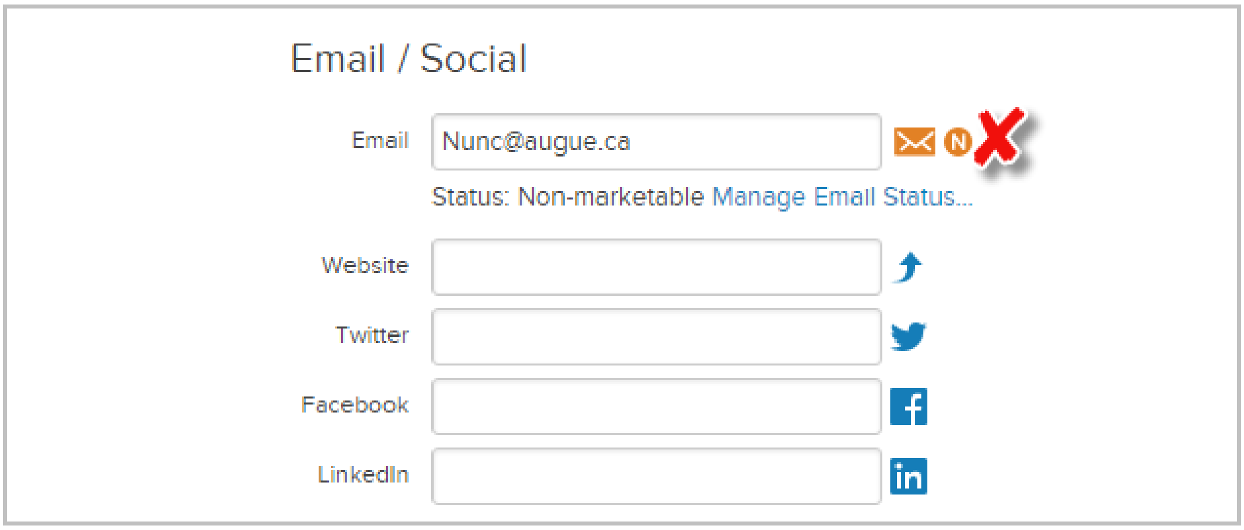
A common troubleshooting question that many Infusionsoft customers experience is "Why didn't a contact/user receive an email that I sent?" In this article, we'll dive into how you can troubleshoot this question just like our Support Team.

Here is the common order of operations that we follow when troubleshooting this problem. Of course, every situation is different, but this should give you a good ideas as to where you can begin looking.

1. Does the contact record have a valid email address in their contact record?

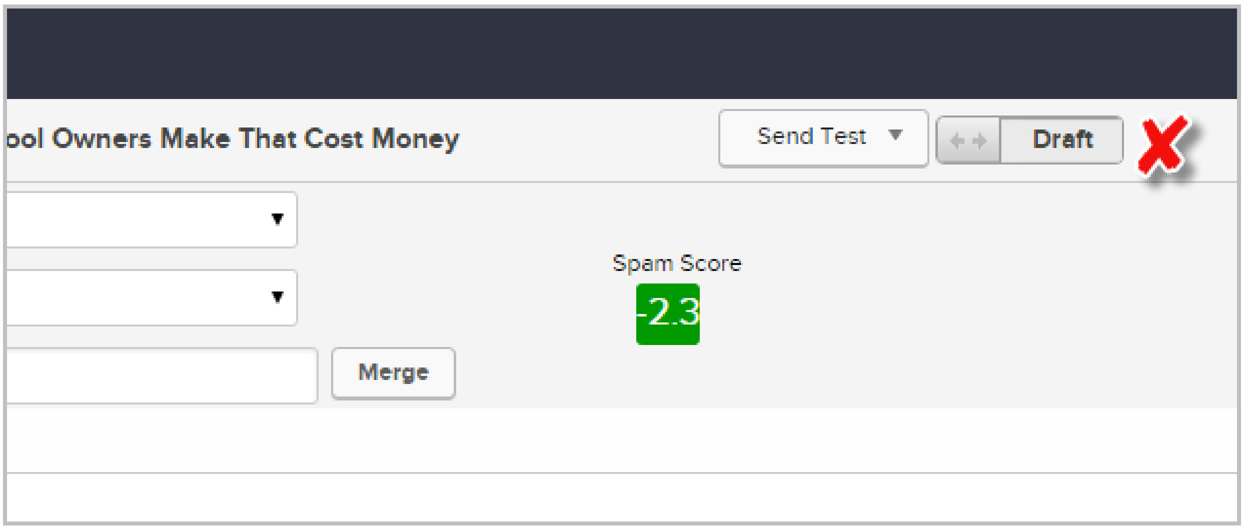


2. Is their email address opted-in to receive automated marketing emails?

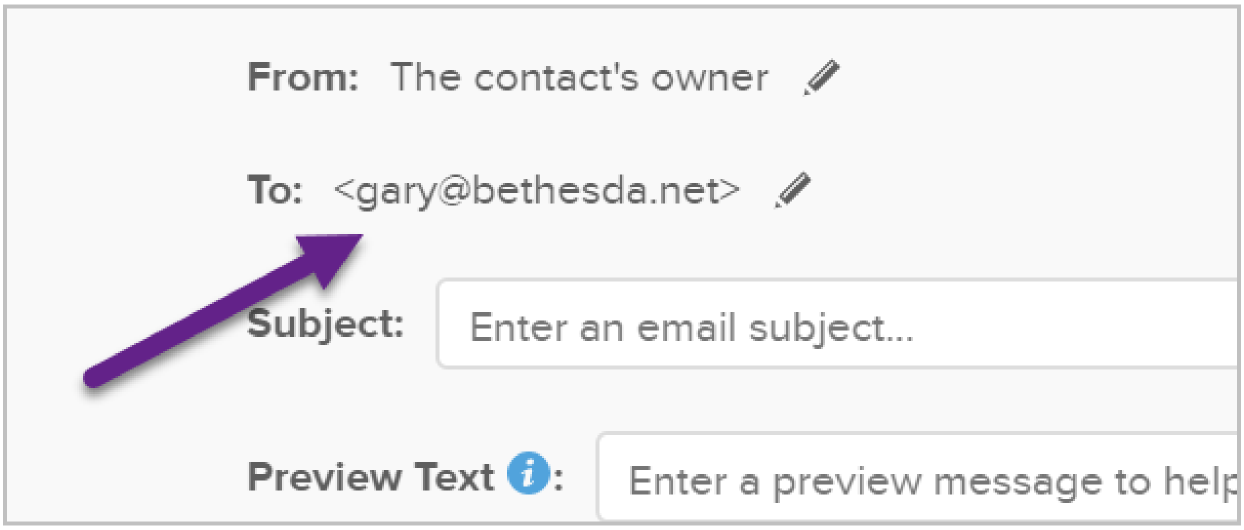


3. Was the contact part of the list being sent to (campaign or broadcast?). The most common example is to check that they have the correct tag applied to their contact record; however, you may be pulling a list based on a custom field that you created or any other number of criteria. Check the contact record to make sure they meet the criteria.

4. If the email is coming from a Campaign, has the email been set to "ready" and published? Is the Sequence that contains the email "ready" and published?



5. Has the “To” field been accidentally hard-coded to an email address instead of the default “Email” merge field?



6. Does the sending domain have their SPF records configured properly?

7. What time zone was the email scheduled in and what time zone are your user preferences set to?

Using a different version of Infusionsoft? Click Here to learn more

Mass Opt In Or Opt Out Contacts

Last Modified on 07/23/2018 12:50 pm MST

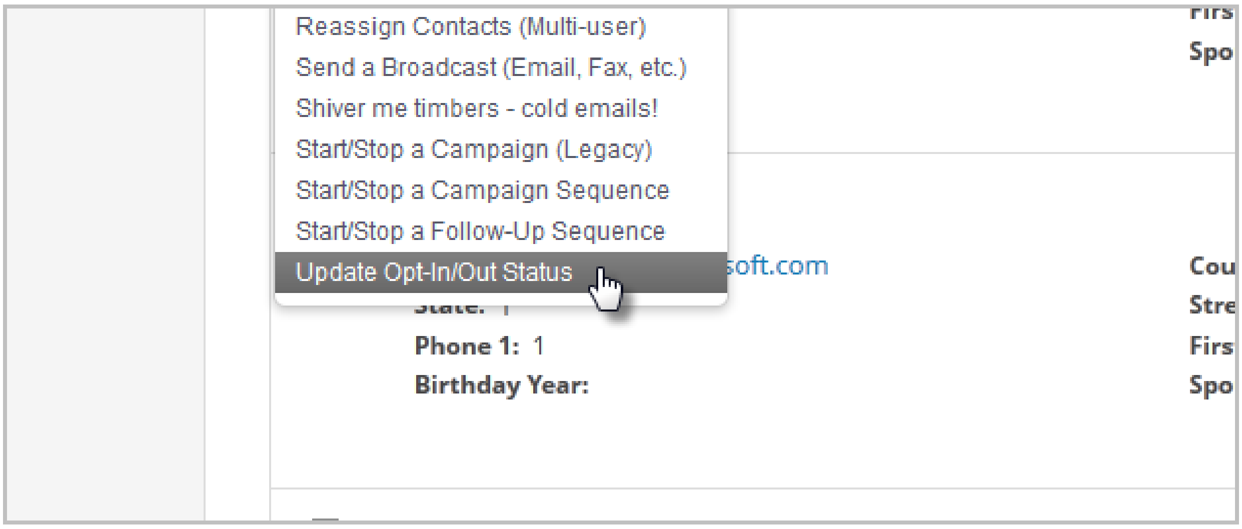
If you transition to Infusionsoft from another email system, you will export lists of contacts from that system so that you can import them into Infusionsoft. When you import a list, you must confirm that you have received prior permission to send email to those contacts. If you do not have permission, the system assigns a "non-marketable" status to the email addresses on the list. If you do have permission, the system assigns a "single opt-in " status for each email address on the list you import. It is a good practice to re-confirm the people with the single opt-in status. This is another layer of protection, ensuring that you get the best deliverability possible and that the people on your list really want to receive your messages. You can create a custom double opt-in link and email to send as a broadcast, or you can use the double opt-in template we provide.

Be Careful! You may only send the double opt-in request email to people from whom you've already received prior permission. Do not send it to a purchased, borrowed, or harvested list (or any other list that is questionable). Infusionsoft customers must abide by the CAN SPAM regulations and the Infusionsoft Acceptable Use Policy.

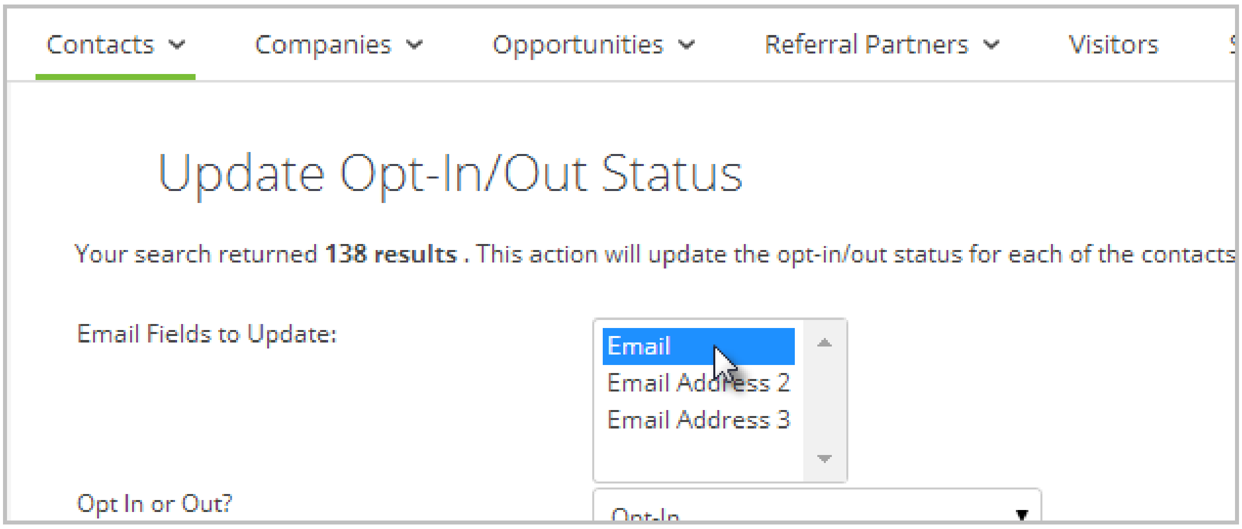
Please Note! Only emails that are in the 'Non-Marketable' will be opted in through the mass action. Email addresses that have been Opted-out either by the recipient or an Infusionsoft user cannot be opted back in.

1. View the contacts that you want to update. Typically, this will be a previous import or a tagged list.

2. After you find the contacts, click on the **Actions** button at the top left of your search results and select the very last option, **Update Opt-in/Opt-out Status**



3. Choose which email address field you would like to update. The (default) main email address is the first in the list and will be pre-selected. you can hold the **Ctrl** key (or **Command** key on a Mac) to select multiple fields to update.



4. Choose to Opt-in or Opt-Out these email addresses en masse.

5. If you choose to Opt-in the email addresses, Infusionsoft will require specific information explaining how these email addresses were obtained. Provide as much information as you can and follow the prompts if more information is required.

6. Click **Process Action**

Using a different version of Infusionsoft? Click Here to learn more

Email Status Icons Explained

Last Modified on 08/27/2018 8:51 pm MST

Each email address stored in Infusionsoft is assigned a status. This status is generally assigned automatically, but can also be managed manually with some limitations. You cannot double-opt in a person or single-opt in someone who has previously opted out (unsubscribed) of your email marketing. The email status is visible within individual contact records and can be used as a search criteria for the email status search report (**Marketing > Reports > Email Status Search**.)

Email Status Glossary

- **Unengaged Marketable**: This email status is automatically applied on a weekly basis to any email address that has not engaged with your marketing efforts in the last 4 months. When the contact re-engages, their email status will revert to the previous state. Specifically, the status will be applied when all of the following are true:
    - The contact has no opened an email in the past 4 months
    - The contact has not clicked a link in an email in the past 4 months
    - The contact has not submitted a landing page or web form in the last 4 months
    - The contact's email status has existed in any " opt-in " status for the last 4 months
- **Unconfirmed (Single Opt-In)**: The unconfirmed email status indicates that you have permission to send marketing messages to the email address. An email status is automatically set to Unconfirmed when you import a list and indicate you have permission to send email marketing to the people on the list or when a contact signs up through one of your web forms. The Unconfirmed status is set manually when you add a new contact to Infusionsoft (**CRM > Contacts**) and indicate you have permission to email them, or when you manually manage someone's email status.

- **Confirmed (Legacy)**: Any email address that is confirmed (double-opted in) using a legacy custom confirmation link.
- **Confirmed**: Any email address that is confirmed (double-opted in.)
- **Non-Marketable**: The Non-Marketable email status is assigned to email addresses during import or when a person is added manually, but you did not indicate that you have permission to send email marketing to them. Click on **Manage Email Status** to manually update the email status for a specific email address. You can send individual emails to Non-Marketable email addresses, but cannot send any broadcast or follow-up sequence messages to them.
- **Lockdown**: This status indicates that our email services team has manually disabled the ability to opt-in this email address. This status is rare and only pertains to customers that are working with our email services team.
- **Soft Bounce**: This status indicates that the recipient is not receiving your email due to a temporary issue with their email inbox or email provider. An example would be a full inbox that can no longer receive email messages. After multiple soft bounces the email will be automatically set to hard bounce. If the soft bounce issue is resolved, the status will update accordingly.
- **Hard bounce**: This status typically means that the email no longer exists or it soft bounced too many times.
- **Opt-Out**: The Opt-Out status indicates a person has unsubscribed from all of your email marketing. You can send individual emails to these email addresses, but cannot send any broadcast or follow-up sequence messages to them. You are not able to manually update an Opt-Out status.
- **Opt-Out Admin**: This status indicates that it was manually opted-out by a user in your Infusionsoft account.
- **List Unsubscribe**: This is similar to the unsubscribe link at the bottom of the email. This unsubscribe option will appear at the top of the email and is generated by some email service providers to make it easier for their customers to opt out of unwanted emails.
- **Provide Feedback**: This status indicates that the recipient reported your email as SPAM directly to their ISP.
- **Reported SPAM**: This status indicates that the contact reported your email as SPAM, via the unsubscribe feedback form, after clicking the unsubscribe link at the bottom of the

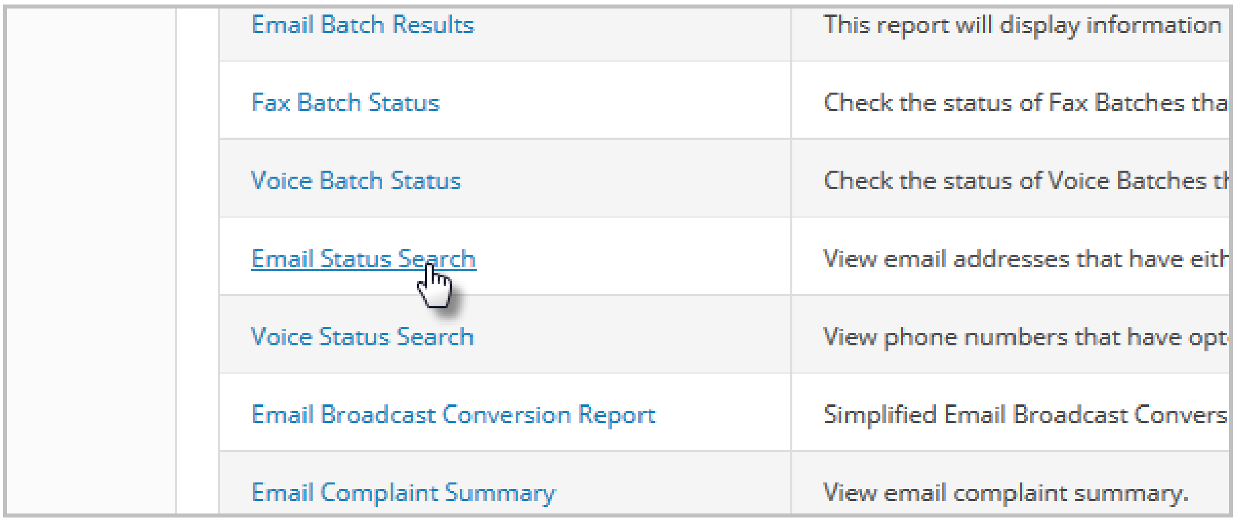
email.This method of reporting SPAM does not count against the threshold, as this is additional feedback from the recipient, after clicking the unsubscribe link at the bottom of the email.

- **Invalid Email**: The Invalid status indicates the email address is missing characteristics of a valid email address (e.g. an @ symbol, .com/.net/.org, etc.)

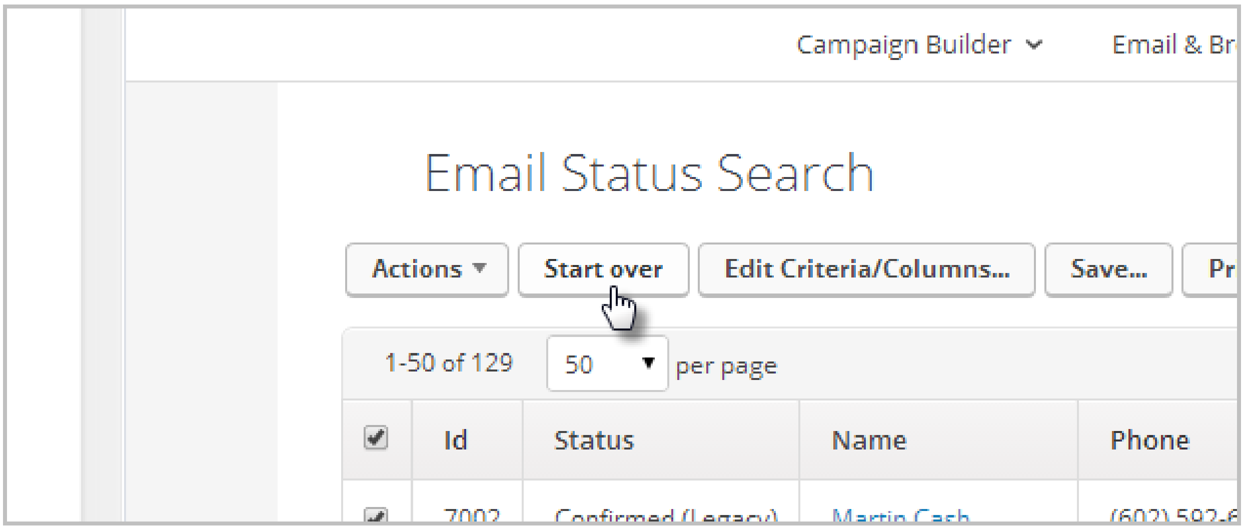
Email Status Search Report

1. Go to **Marketing > Reports**

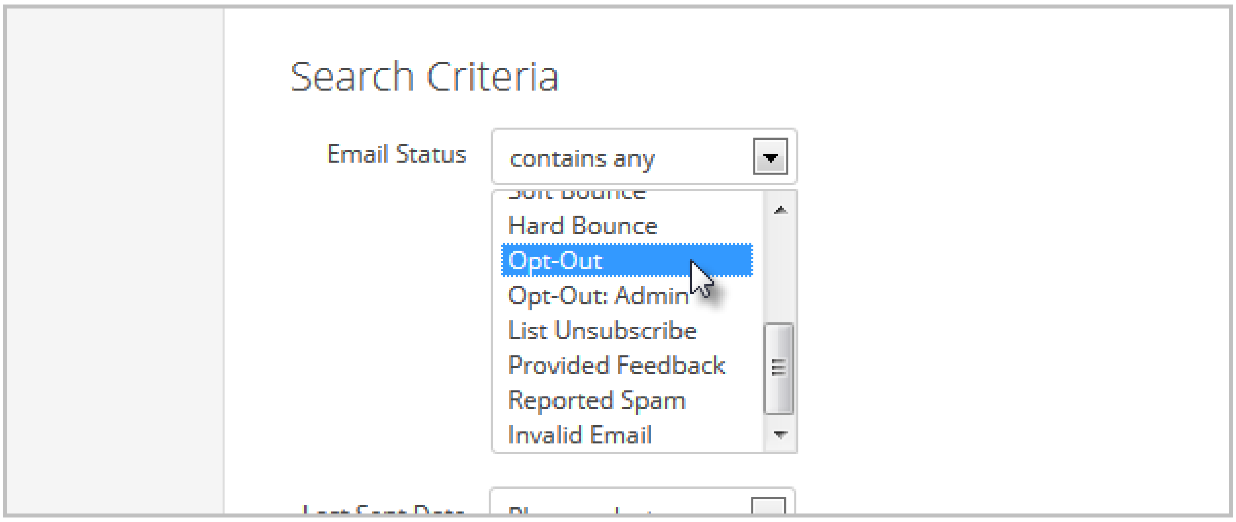
2. Click on **Email Status Search**



3. Click the **Start Over** button



4. Click on the email status you want to search for



5. Click the **Search** button

Automated List Management

Set a "**contact engagement threshold**" (**in months**) which identifies and sets the two statuses listed below automatically. The Automated List Management settings allows you to customize when these email statuses are applied to a contact. To learn more click here

- **Unengaged Marketable Status** - These contacts are eligible to receive your automated marketing emails, but are tracked as not having engaged for a certain number of months. The default time frame is 4 months.
- **Unengaged Non-Marketable Status** - These contacts will no longer be eligible to receive your automated marketing emails unless they engage with an email they've already received from you or submit an Infusionsoft web form.

Using a different version of Infusionsoft? Click Here to learn more

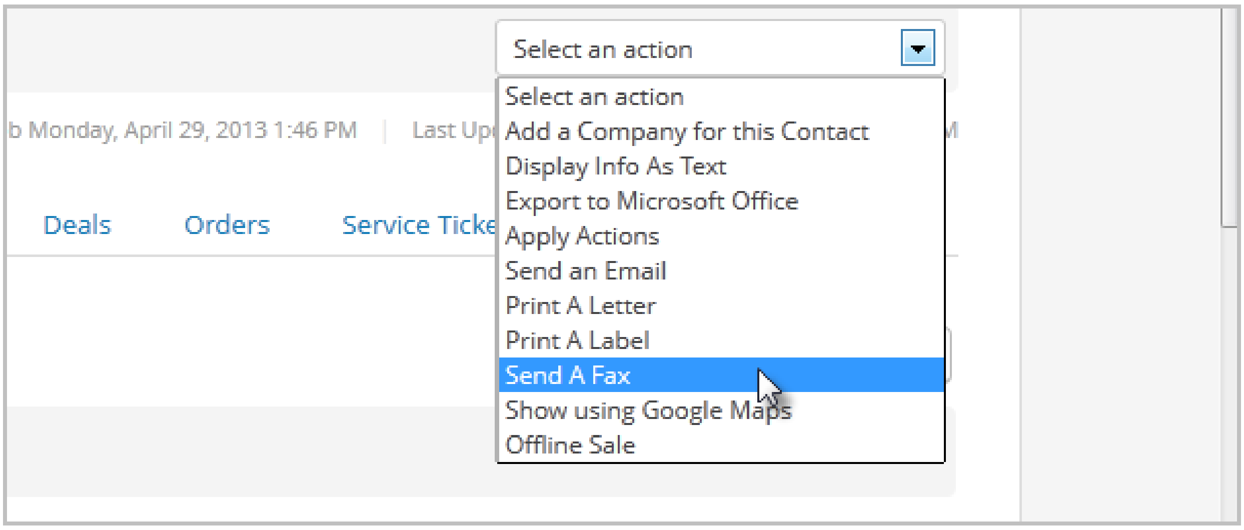
Send a One-Off Fax to a Contact

Last Modified on 07/23/2018 12:51 pm MST

You can send a fax to one contact or broadcast a fax to a group of contacts. Before you start using Infusionsoft to send faxes, you may want to set up a confirmation email address through **Marketing** > **Settings** > **Voice & Fax**. The system will email a confirmation message to this account after each fax is sent.

Send a Fax to a Single Contact

1. Send a fax to a single Contact. While viewing a contact record, click the **Select an action** drop-down and click **Send a Fax**.



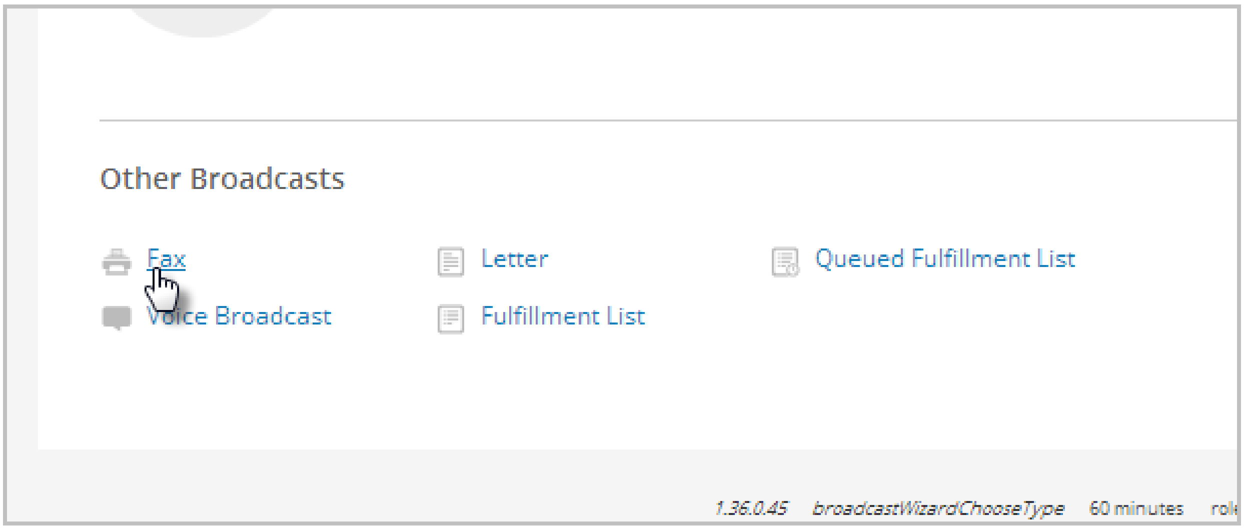
2. Choose from the following options:
    1. Select a system template from the drop-down to use a fax from your template library.
    2. Select a document from the uploaded document drop-down.

3. Click on the **Process** button to send the fax immediately.

Send a Batch Fax to a Group of Contacts.

1. Go to **Marketing** > **Email & Broadcasts** in the main navigation menu

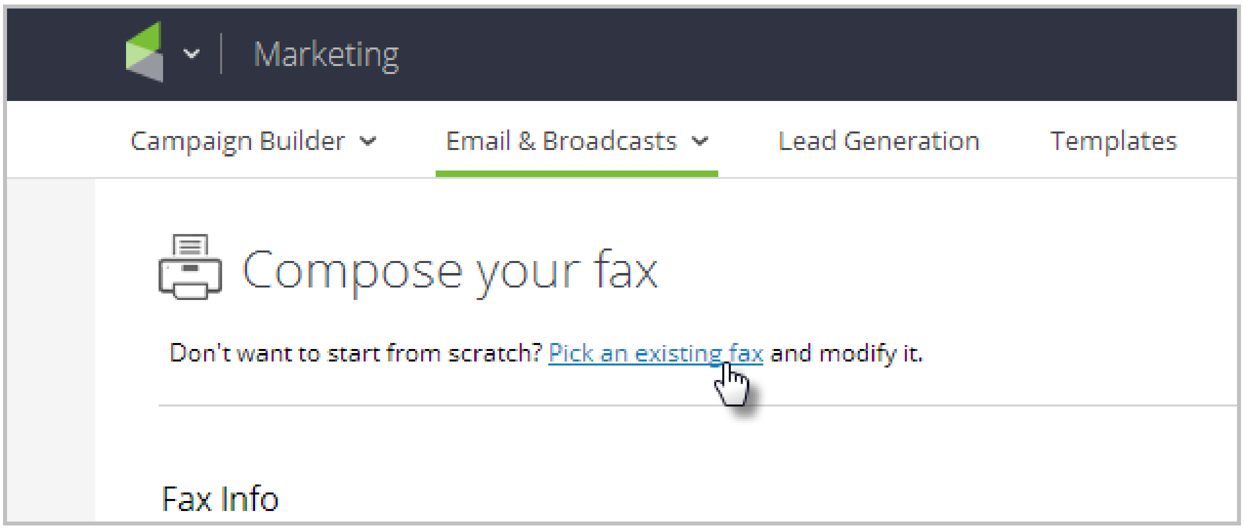
2. Click on the **Fax** option



3. Select the people:
    1. **Saved Search**: Select a list of contacts from the dropdown. If you frequently broadcast to a specific list of contacts, you should create a saved search for that list.
    2. **New Search**: Click on the new search link to create a new list of people. This list is temporary. It is not going to be a saved search.
    3. **Quick add a new contact**: Add a new contact if you find someone missing from the saved search or new search lists.
    4. **Import a list of new contacts**: Import a new list if the contacts you need are not already in Infusionsoft.

4. Click on the **Next** button

5. Upload a file attachment (such as a pdf or word document) and select it from one of the Attachment drop-downs. If you have previously created a Fax Template, click the **Pick an Existing Fax** link.



6. Click on the **Send Test** button to send the fax to yourself. Note: You must have a valid fax number in your user record. Fax fees will apply

7. You must have permission to send fax broadcasts to a business. Click on the **Acceptable Use Policy** link to read the policy, then mark the checkbox to confirm you are in compliance.

8. Click on the **Next** button

9. Go to **Marketing** > **Reports** > **Fax Batch Status** to view the status of your fax

Using a different version of Infusionsoft? Click Here to learn more

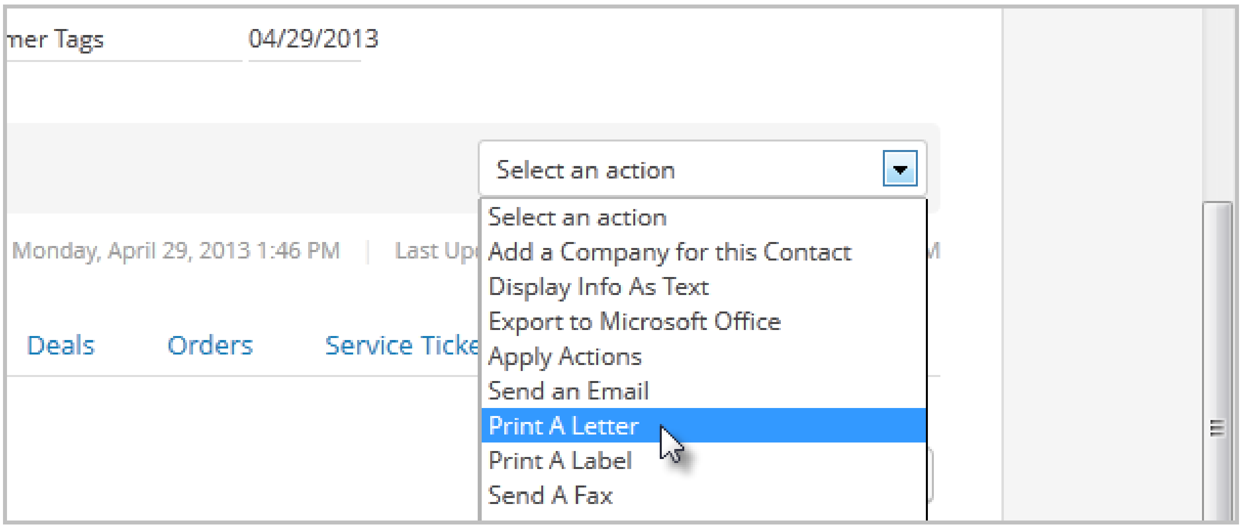
Print a Letter for a Contact

Last Modified on 07/23/2018 12:54 pm MST

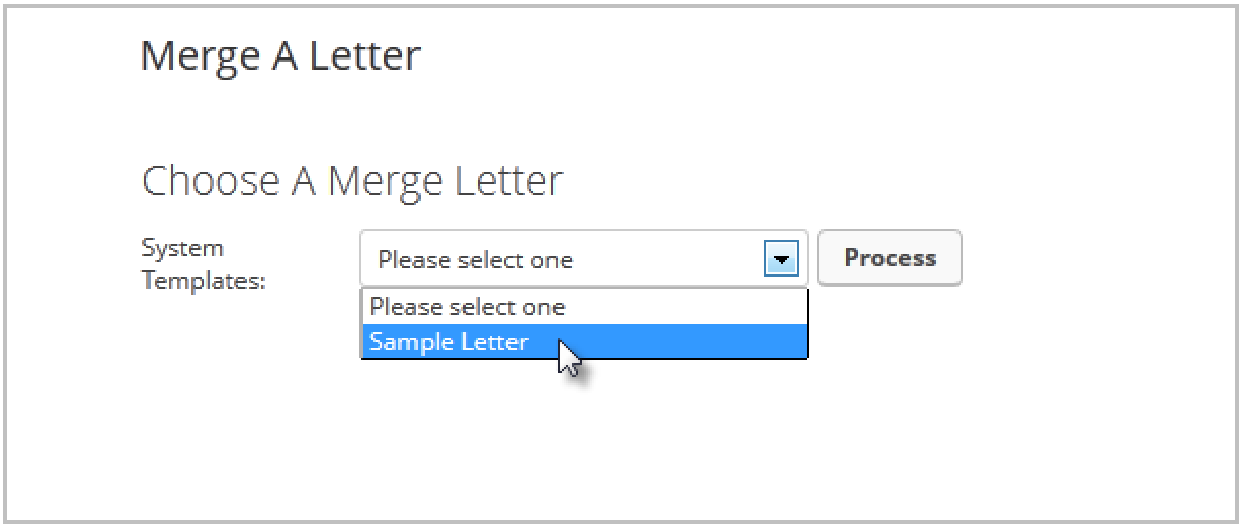
You can print a letter for one contact or create a letter broadcast to print one for a group of contacts. Infusionsoft will create a letter in Microsoft Word with the merge fields already filled in. You just need to print the letter and (if needed) the mailing labels.

Print a Letter For One Contact

1. While on the contact record, click the contact action drop-down and select **Print a Letter**.



2. Select a letter template from the drop-down. These templates are created and stored in the template library

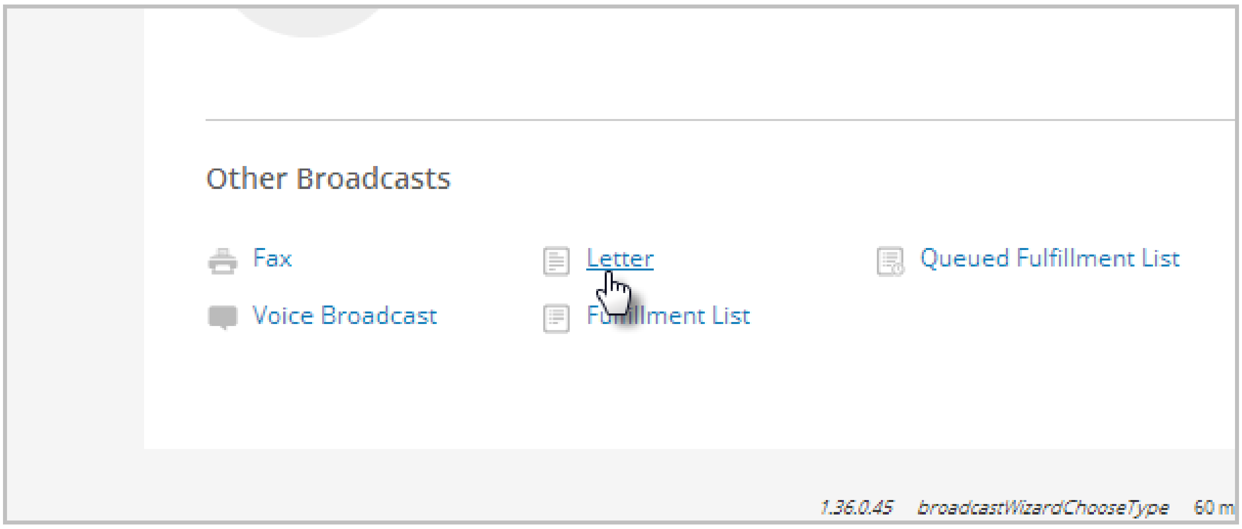


3. Click on the **Process** button to open the document in Microsoft Word

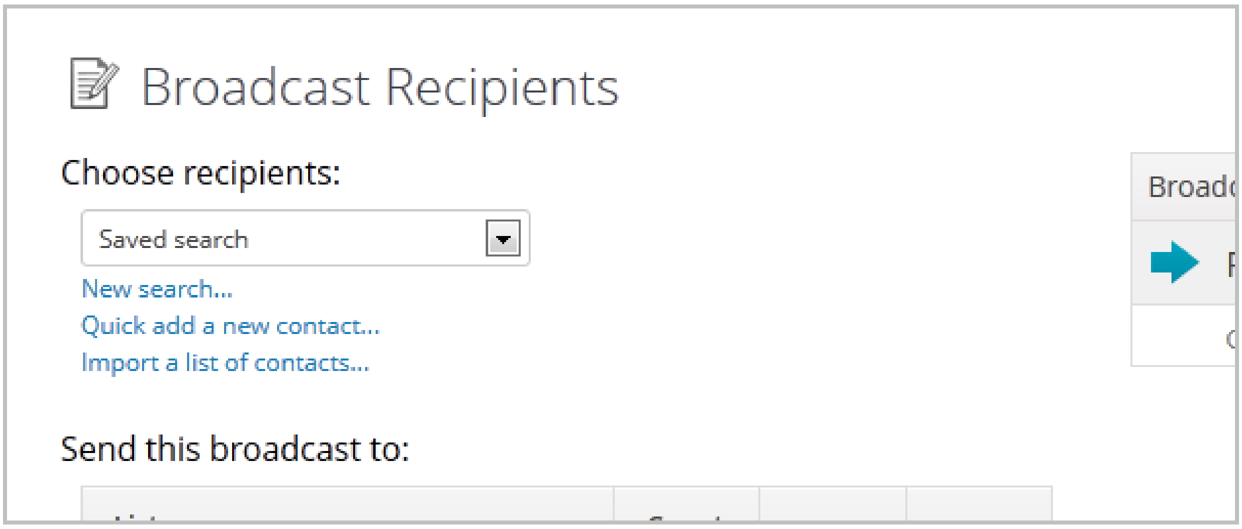
Batch Print a Letter for a Group of Contacts

1. Go to **Marketing** > **Emails & Broadcasts** in the main menu.

2. Click on the **Letter** option



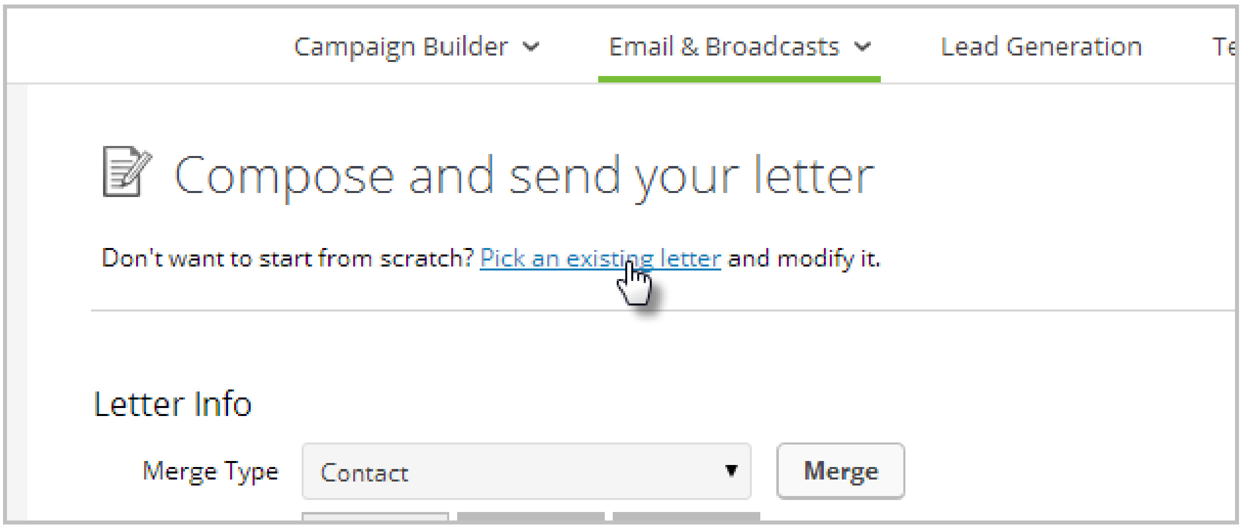
3. Select the contacts



- **Saved Search:** Select a list of contacts from the drop-down. If you frequently broadcast to a specific list of people, you should create a saved search for that list.
- **New Search:** Click on the new search link to create a new list of people. This list is temporary, it is not going to be a saved search.
- **Quick add a new contact:** Add a new person if you find someone missing from the saved search or new search lists.
- **Import a list of contacts:** Import a new list if the people you need are not already in Infusionsoft.

4. Click on the **Next** button

5. Create a new letter or click on the **Pick an Existing Letter** link to select a template from your template library. Click on the **Use This** link to choose a template. Note: If you create a new letter, fill in the processing info before proceeding.



6. Click **Send** to send the responsible user an email notification and create the letter job on the fulfillment widget on their user dashboard

Using a different version of Infusionsoft? Click Here to learn more

Hide Your Email Communications On A Contact Record

Last Modified on 07/23/2018 12:55 pm MST

Emails you receive through the Infusionsoft email client are automatically recorded in the communication history of the contact that sent you the message. Your reply is also recorded in the history by default. Most of the time this is desirable since it helps you centralize communications, and gives your user team more visibility into the current status of the relationship with each contact. There may be times you want to prevent emails from specific companies from showing up in the email history.

In Infusionsoft, you can set up a domain level filter that will block all communications from that domain from displaying in the contact record. If you remove the filter, the communications will show up again and all users who have access to the related contact record will be able to view them.

> **Example**: Your company negotiates contracts with various suppliers. You want to put these suppliers on your company email newsletter list, which you send as a broadcast through Infusionsoft. However, you do not want your users to see the personal email communications that take place as you negotiate pricing and contracts with these suppliers. You need to be able to correspond with these vendors through the Infusionsoft email client, but maintain the level of privacy and confidentiality required. You want to hide all of the communications that take place with specific vendor domains (e.g. vendordomain.com) so that they are only accessible from the email client, but not from the Person Record for that vendor.

1. Go to **Marketing** > **Settings** in the main navigation menu
2. Click on **Email Defaults** in the settings menu
3. Go to the **Email** section and enter the domain name into the **Email History Ignore Domains** text area (e.g. vendordomain.com). Note: This is a domain level filter, it does not filter a specific email address (e.g. supplier@vendordomain.com).

4. Click **Save** to apply the change. Note: To remove the filter, just delete a domain from this list and save. When you remove a domain, the communications with that domain are no longer filtered from the person's communication history.

Using a different version of Infusionsoft? Click Here to learn more

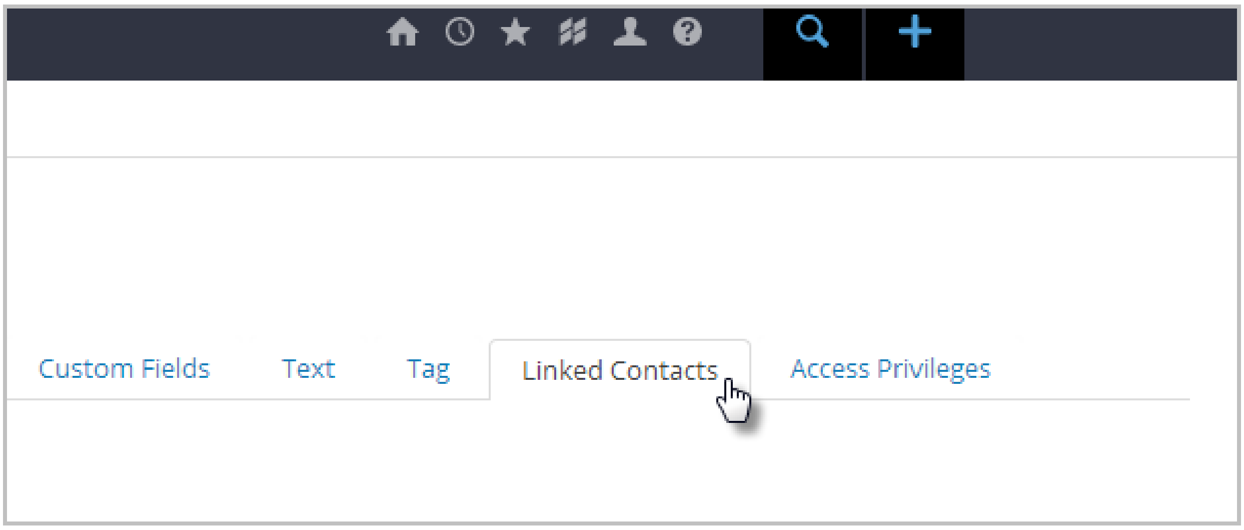
Linked Contacts

Last Modified on 07/23/2018 12:55 pm MST

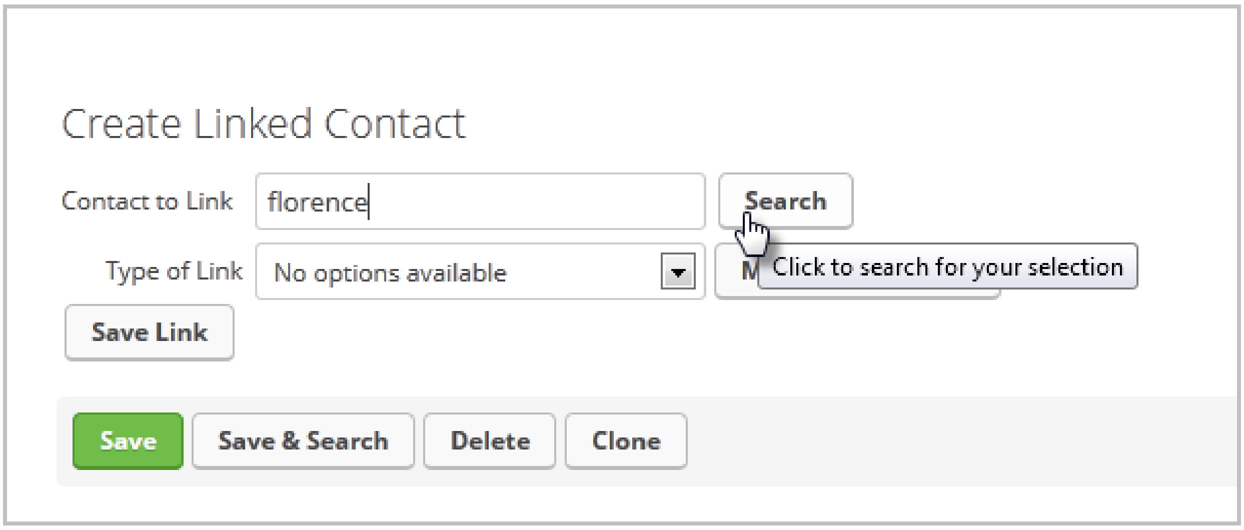
Alert! The Linked Contact feature is only recommended for very specific situations. This feature is rarely an ideal way to group contacts together. Tags are the ideal way to group your contacts in Infusionsoft.

Some businesses need to track non-company relationships, like family relationships and professional service relationships. For example, if you are a real estate agent, you may need to track contacts for the title company, inspection company, mortgage company, etc. If you are a dentist, you may need to track a husband and wife relationship. If you sell software, the businesses you sell to may outsource their IT needs. You can create contact record relationship links in Infusionsoft.

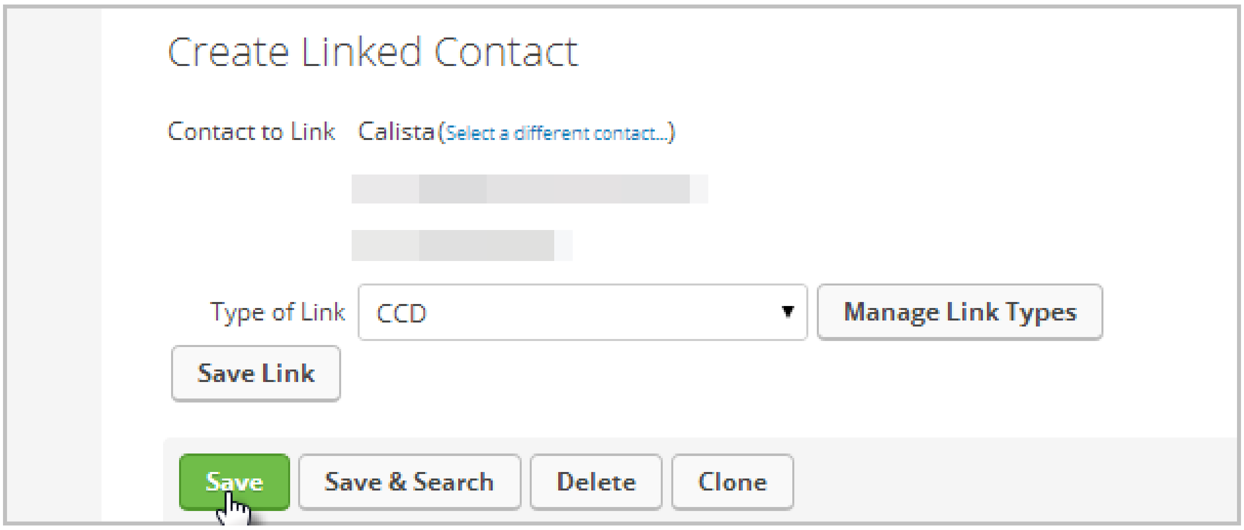
1. While viewing a contact record, click on the Linked Contacts tab in the top row



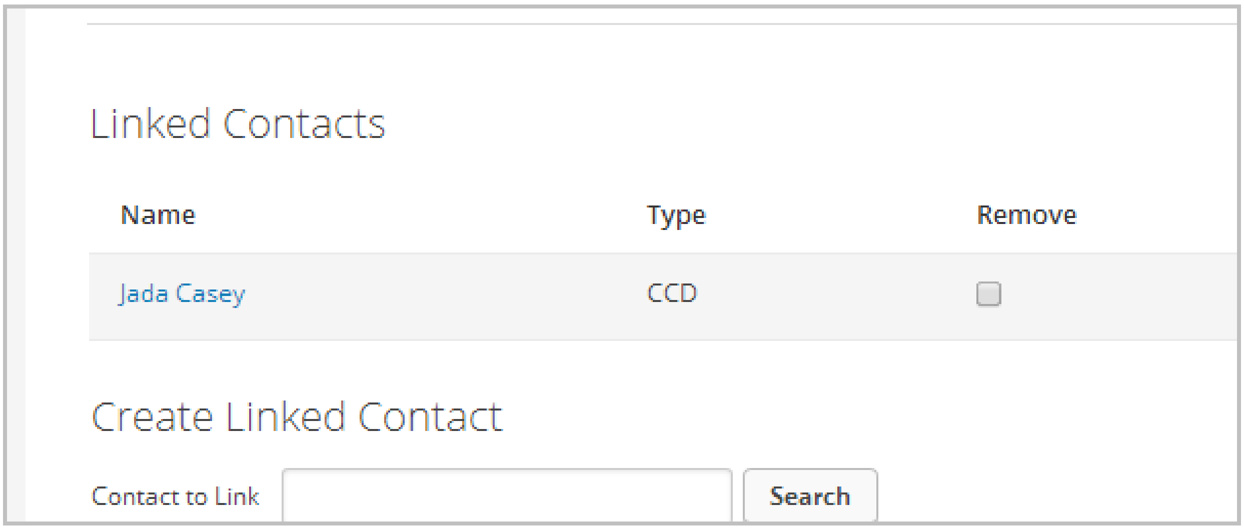
2. Search for a contact record to link to this contact. Type the name of the person and click the Search button



3. Select a type of link from the drop-down and click Save. (optional) Click Manage Link Types to create a new type.

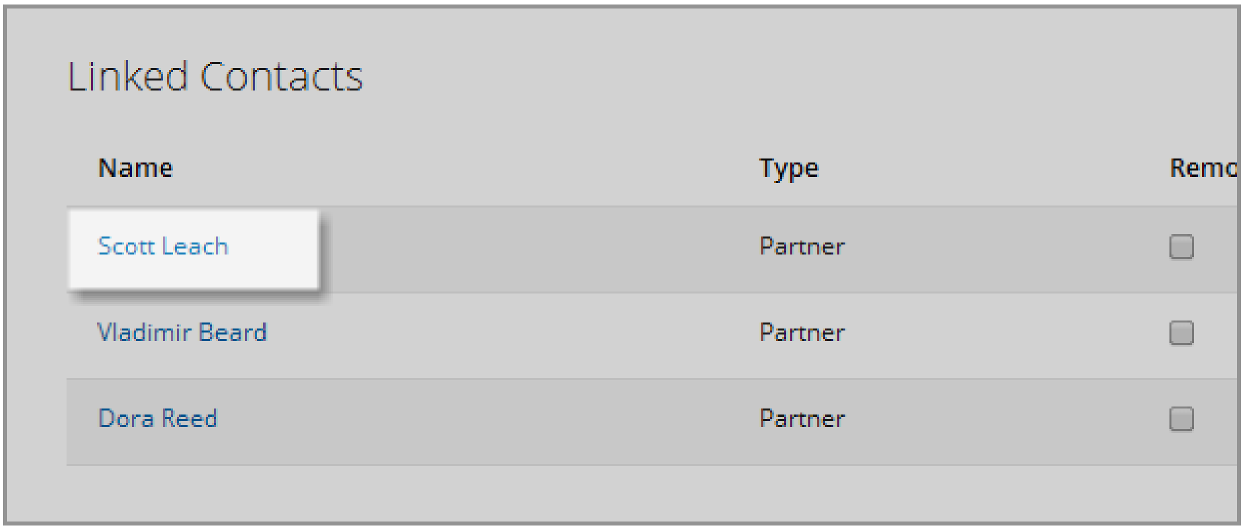


4. The contact is now linked to the one that you are viewing. You can navigate to the linked contact record, send them an email, or create a task

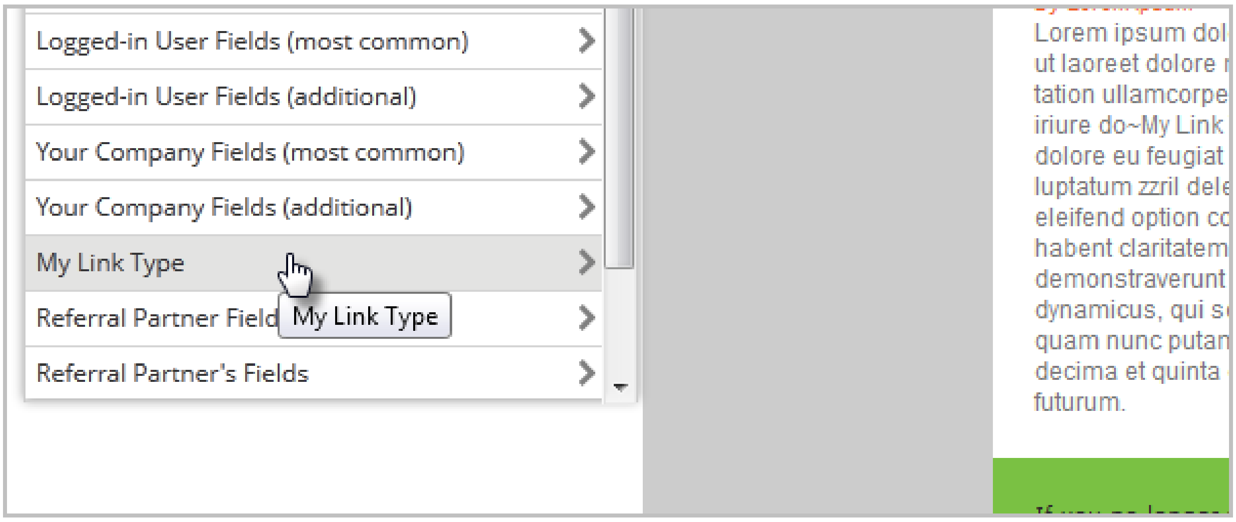


5. When composing an email, you can merge a linked contact into the body of the email, or you can cc them by merging their email address in the cc field

   Warning! You can only merge the first linked contact per link type. For example, if you had 3 linked contacts under a linked contact type called "Partner", only the first of those contacts would merge.

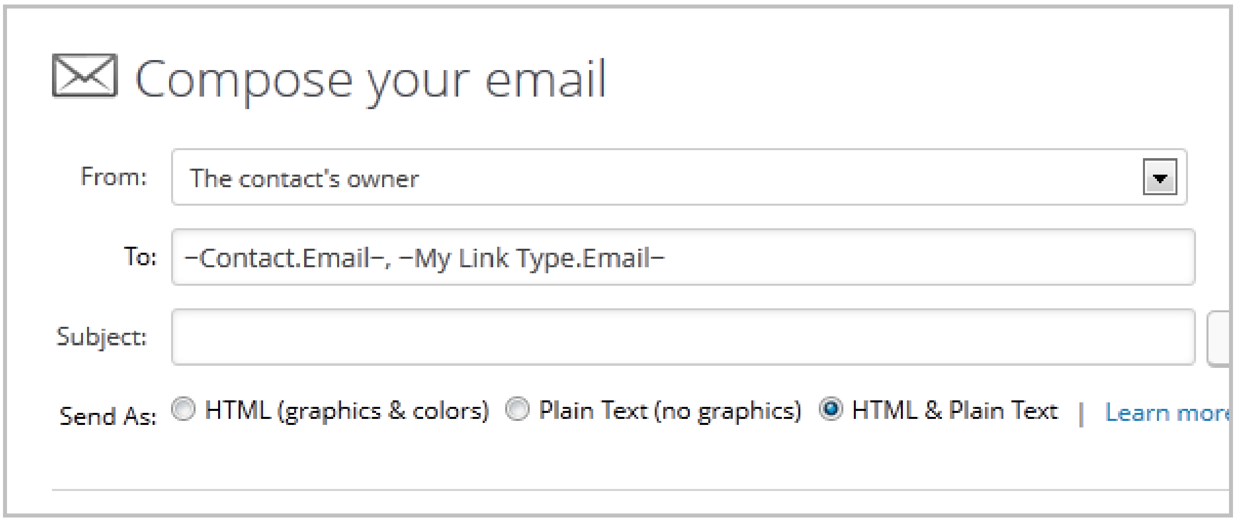


6. Click the merge field and select the name of the Link Type that you created



7. Select where in the email you would like to merge the field

8. Click the field that you would like to merge


Compose your email
From:
The contact's owner
To:
~Contact.Email~, ~My Link Type.Email~
Subject:
Send As:
HTML (graphics & colors)
Plain Text (no graphics)
HTML & Plain Text
Learn more

Using a different version of Infusionsoft? Click Here to learn more

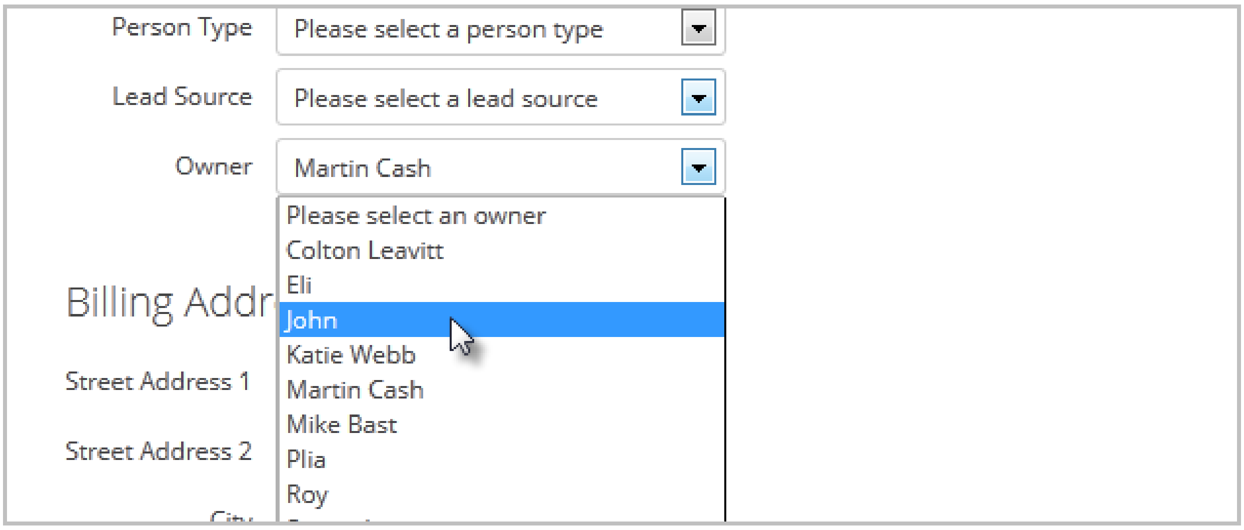
Reassign Contacts to Another User

Last Modified on 07/23/2018 12:55 pm MST

Note that you will need the proper permissions to change the owner drop-down menu!

Reassign an Individual Contact Record

1. While viewing a contact record, select a user from the *owner* drop-down menu.



2. Click on the **Save** button to apply the change.

Reassign a Group of Contacts to Another User

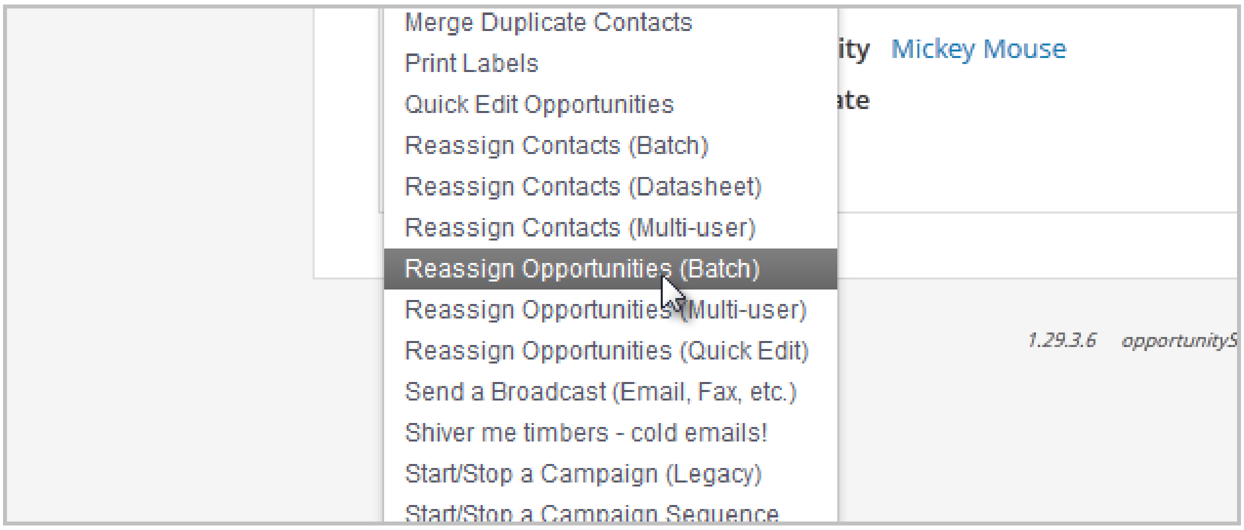
You can reassign a group of contacts or opportunities to a new owner. You can do this in one of three ways:

- **Reassign Contacts (Batch) or Reassign Opportunities (Batch):** This option allows you to reassign an entire list of contacts or opportunities to one person. You might use this when you want to assign all of the opportunities in a specific stage to one sales rep (e.g.

a "Qualifying" stage.)

- **Reassign Contacts (Multi-user) or Reassign Opportunities (Multi-user)**: This option allows you to redistribute a list of contact or opportunity record s using a numerical logic. You can create new logic rules or use an existing round robin distribution logic. You might want to use this when a sales rep leaves and you need to reassign his opportunities to multiple sales reps.
- **Reassign Contacts (Datasheet)**: This option allows you to quickly update the owner (assigned user) for up to 20 contact records at a time.
- **Reassign Opportunities (Quick Edit)**: This option allows you to quickly edit the user, next action date, and stage for on a per-opportunity basis. Each opportunity can have different values in each field, but you edit the values from a list and can save the updates for all of the opportunities at once.

1. Go to **CRM** > **Opportunities**
2. Select a saved search from the drop-down, or enter search criteria to create a new list
3. Click on the **Actions** button and select a reassignment option from the drop-down (e.g. Reassign Opportunities (Batch), etc.)



4. Reassign the opportunities using one of the methods listed above
5. Click on **Process Action** or **Save** to reassign the opportunities

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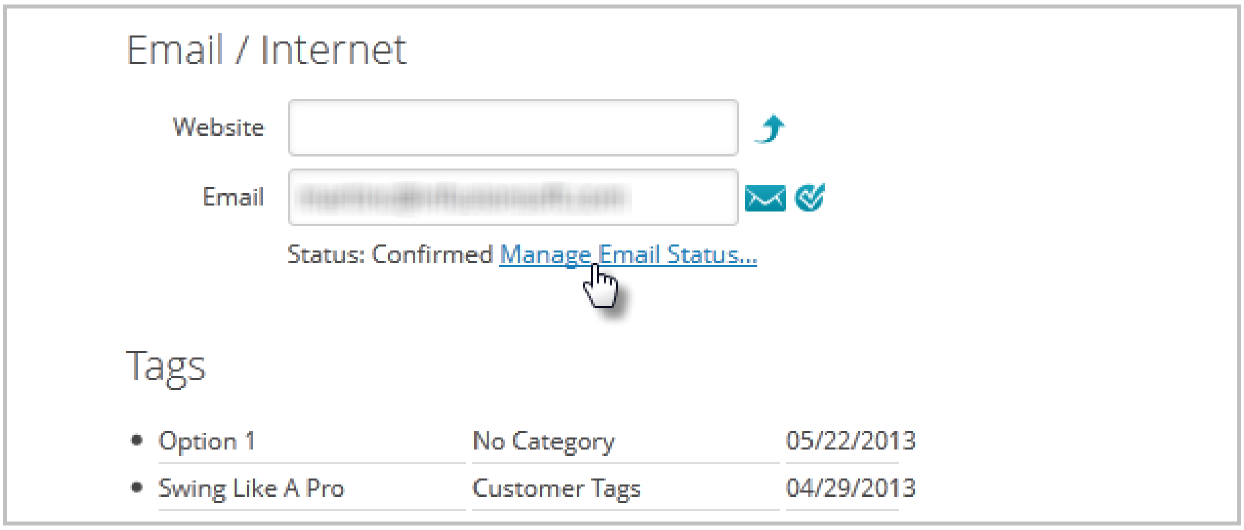
Opt-Out Contacts From Receiving Marketing

Last Modified on 07/23/2018 12:56 pm MST

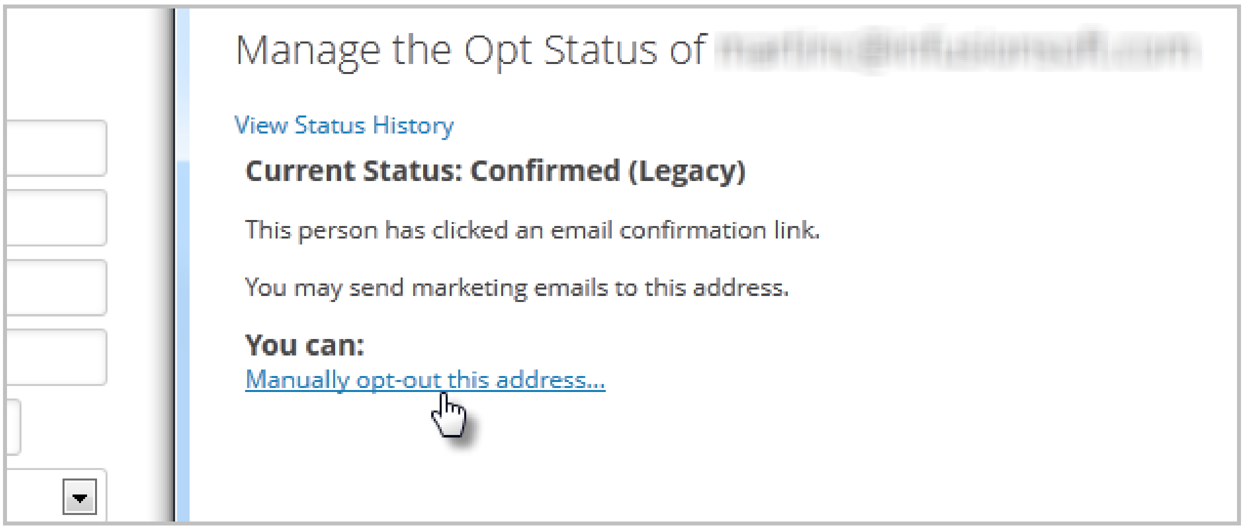
Your contacts are able to manage their own subscriber status through the custom unsubscribe / opt-out links in broadcast and campaign sequence emails. When a contact clicks on the link, they are able to opt-out of all of your email marketing or just unsubscribe from one specific list. Occasionally, contacts may send you an email or call you with a request to remove them from your email marketing. If a contact wants to be removed from one specific list, but still wants to continue receiving other email marketing from you, you can remove the tag associated with that list (e.g. newsletter subscriber) to comply with their request. If you need to remove a contact or a list of contacts from ALL of your email marketing, then you will need to update their email status.

Opt-out an individual contact

1. While viewing their contact record, click on the **Manage Email Status** next to their email address.



2. Click on **Manually opt-out this address** and select an opt-out configuration from the drop-down list. This list includes all of the custom unsubscribe links you've created.

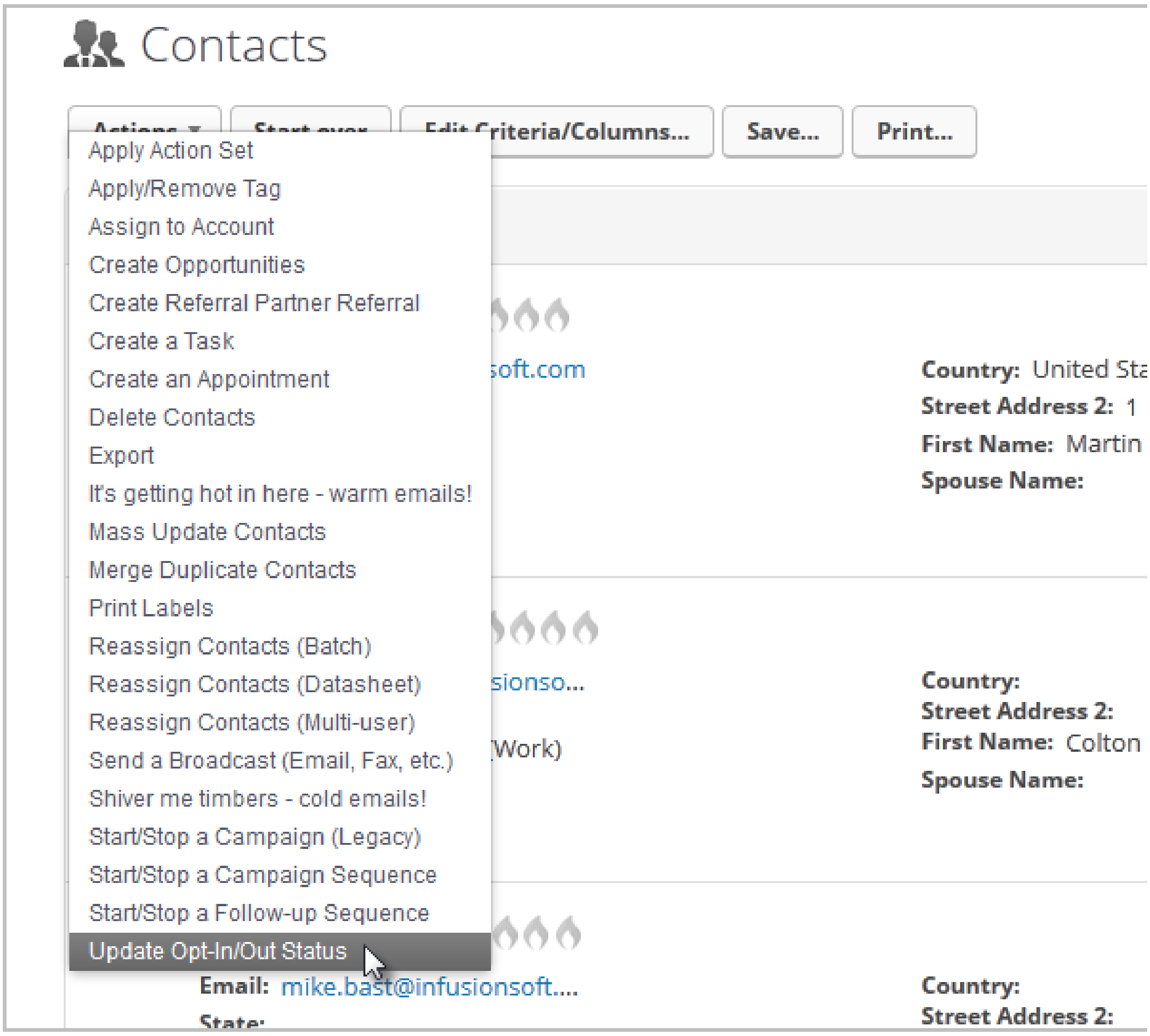


3. Click on the **Opt-Out** button.

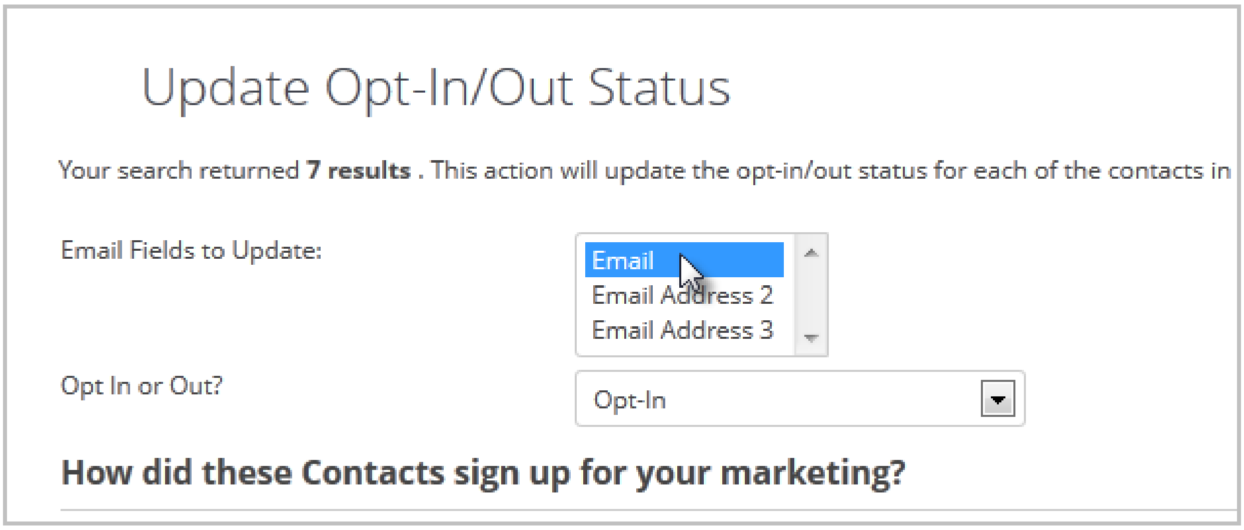
Opt-out a list of contacts

1. Find the list of contacts you want to opt-out of email marketing.

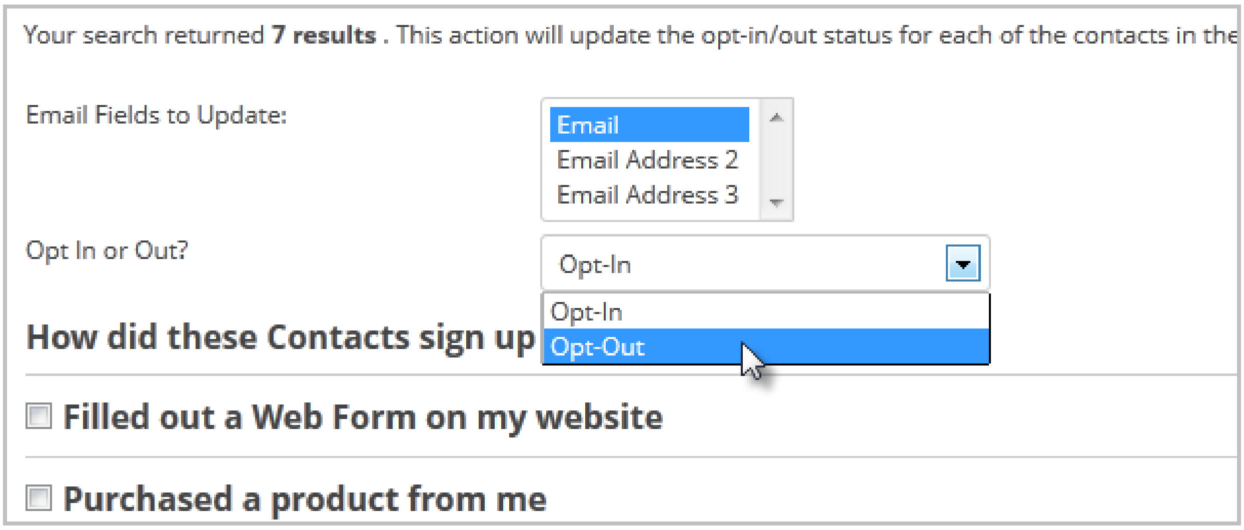
2. Click on the **Actions** drop-down in your search results and select, **Update Opt-In / Out Status**.



3. Select the email address field(s) you wish to update. The first email option is the main email address on their contact record.



4. Select **Opt-Out** from the status drop-down.

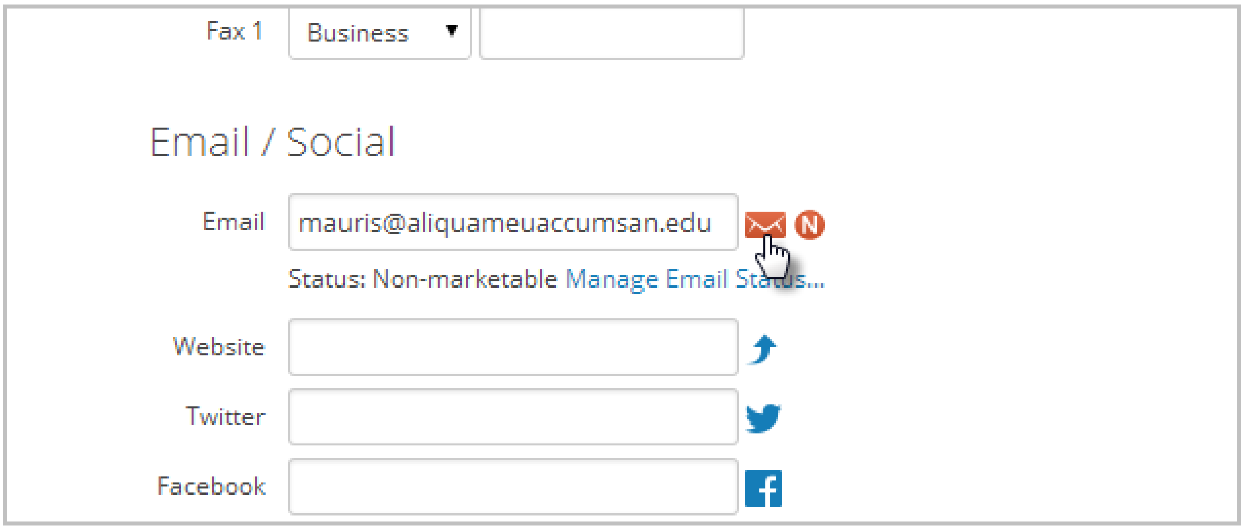


5. Click on the **Process Action** button.

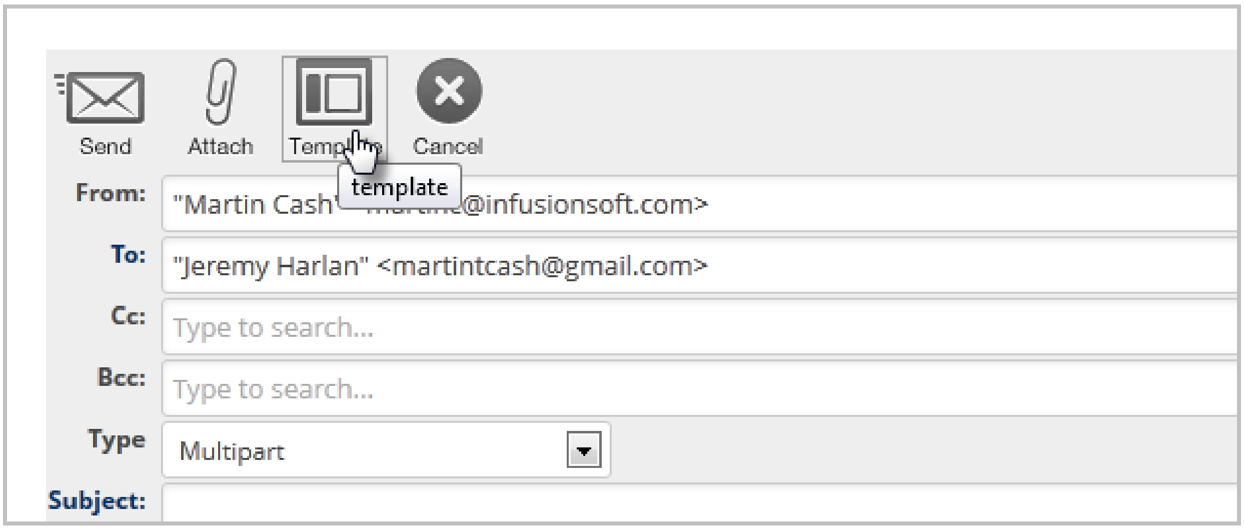
Send A One-Off Email To A Contact

Last Modified on 07/23/2018 12:56 pm MST

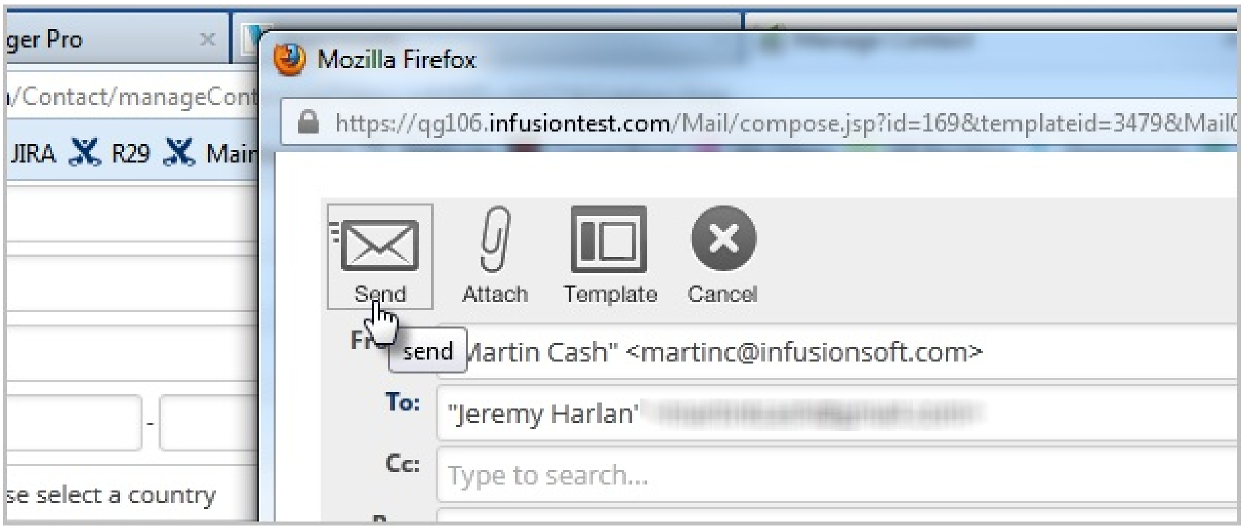
1. While viewing the contact record, click the email icon next to their email address.



2. Create your email now, or select a different starting template by clicking on the **Template** button.



3. Click **Send**.



ger Pro
/Contact/manageCont
JIRA
R29
Mozilla Firefox
https://qg106.infusiontest.com/Mail/compose.jsp?id=169&templateid=3479&Mail
Send
Attach
Template
Cancel
send
To:
"Jeremy Harlan"
Cc:
Type to search...
se select a country

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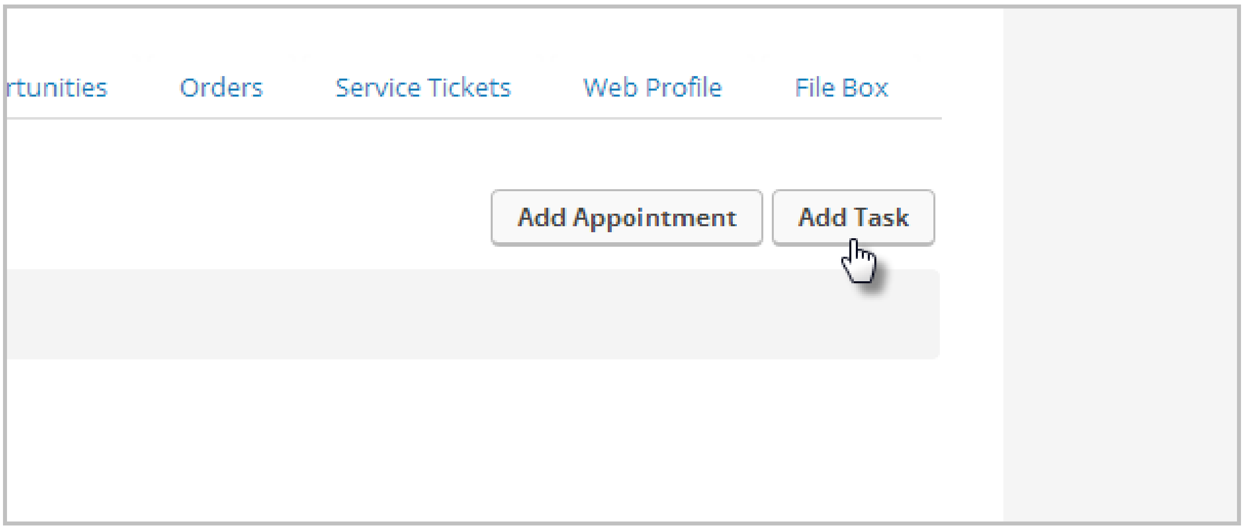
Create a Task or Appointment While Viewing the Contact Record

Last Modified on 10/03/2018 5:54 pm MST

You can create tasks or appointments from a contact record or from My Day . When you use the My Day calendar, you'll be able to coordinate tasks or appointments with your overall schedule. When you create tasks or appointments on a contact record, Infusionsoft will not alert you to existing of tasks or appointments or prevent double-booking.

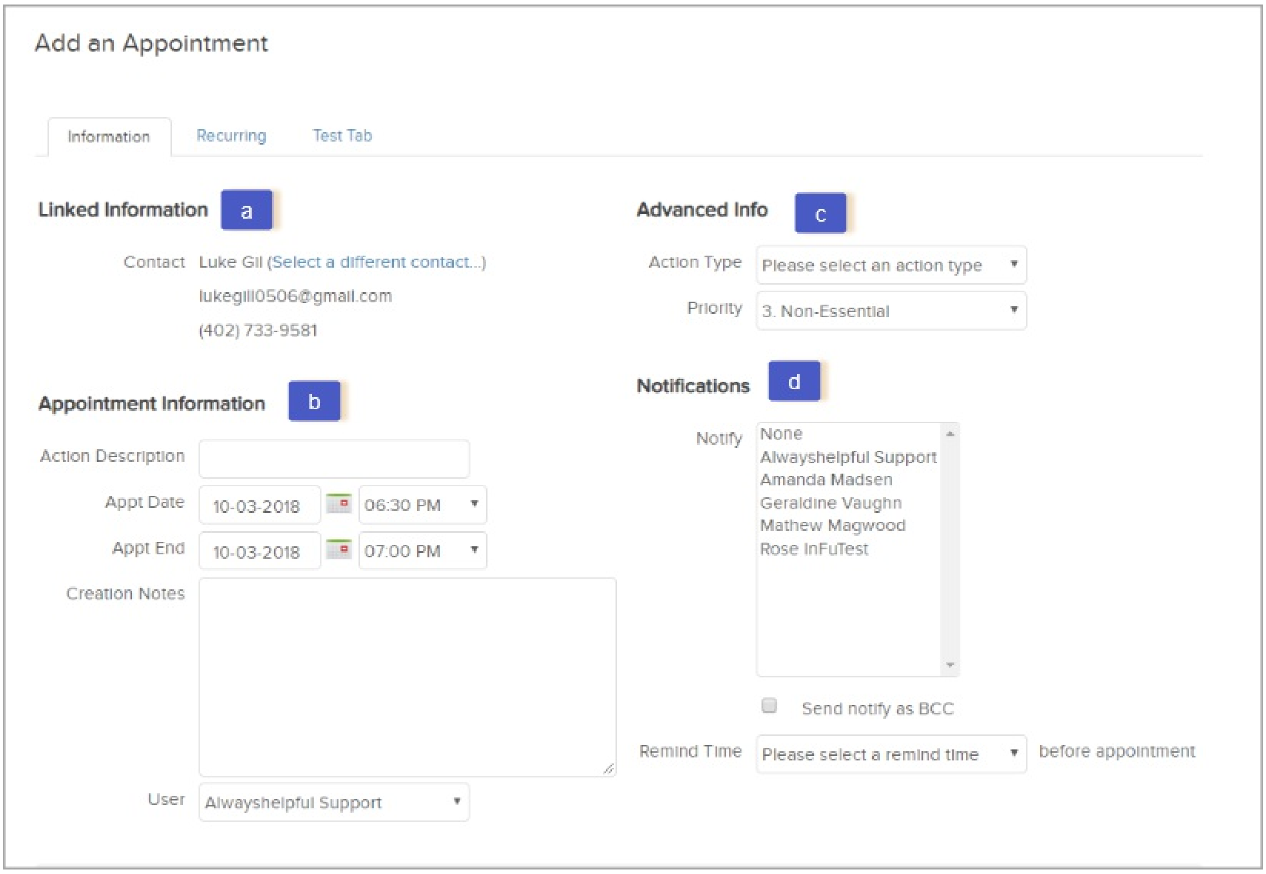
1. While on a contact record, click on the **Add Appointment** or **Add Task** button.
    a. **Add Task:** will create a "to do" item on your calendar. You can assign a date and time, but cannot block out a window of time on your calendar for a task. **Note**: Tasks have a start date, but the end date is not recorded until the task is complete.
    b. **Add Appointment:** to block out a specific period of time and/or to record a firm commitment. **Note**: Appointments have a Start date, End date, and time.

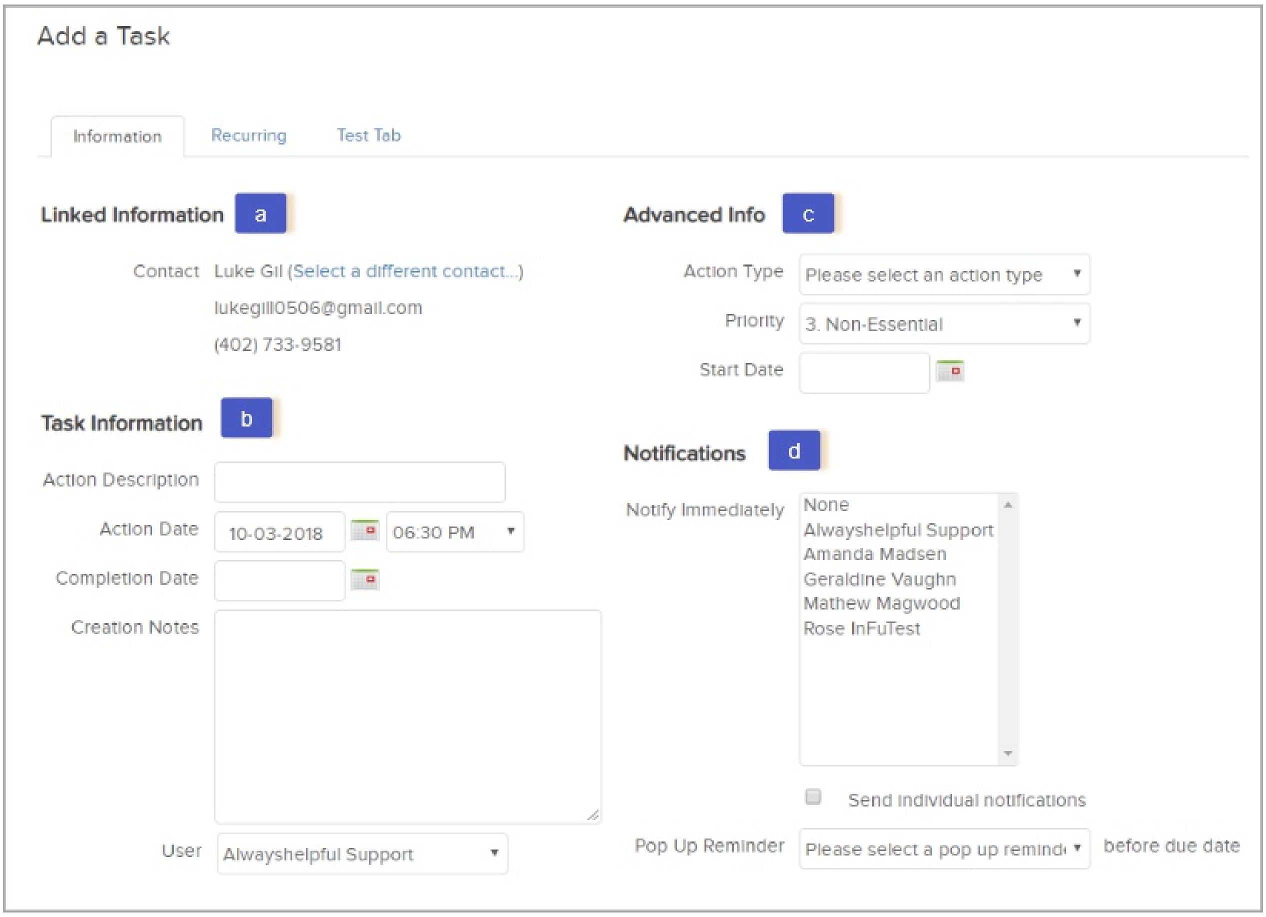


2. Fill in the task or appointment details:
    a. **Linked Information**: The task or appointment will automatically be linked to the contact record you are in. Click on the Select a different contact link to link it to a different person. **Note:** that it will only be linked to one contact. If you need to link it to multiple contacts, you must create multiple tasks/appointments.
    b. **Task / Appointment Information**: Enter the event details. **Note** that your date/time entry will specify when it shows up on the user's calendar.
    c. **Advanced Info**: Assign an Action Type and Priority. The priority helps you identify

which tasks are most critical so you can work on them first.

d. **Notifications**: Click on one or more users to send them an email notification when this task is created. Set a pop-up reminder to trigger before the appointment. The pop-up reminder displays when the user is logged into Infusionsoft.





3. Click the **Save** button to save the task or appointment to the calendar and/or task list.

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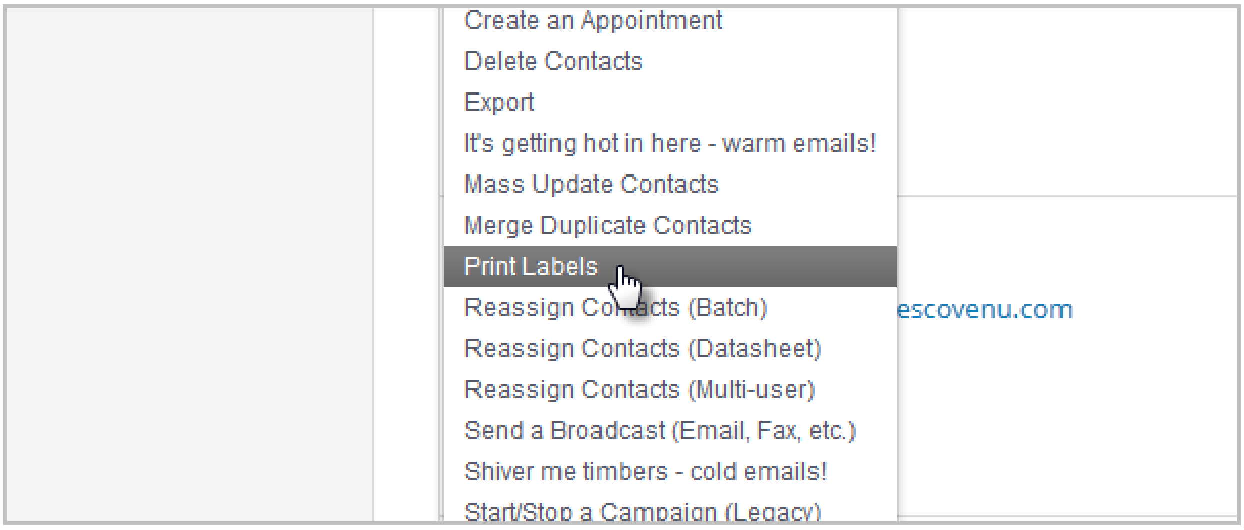
Print Mailing Labels For Contacts

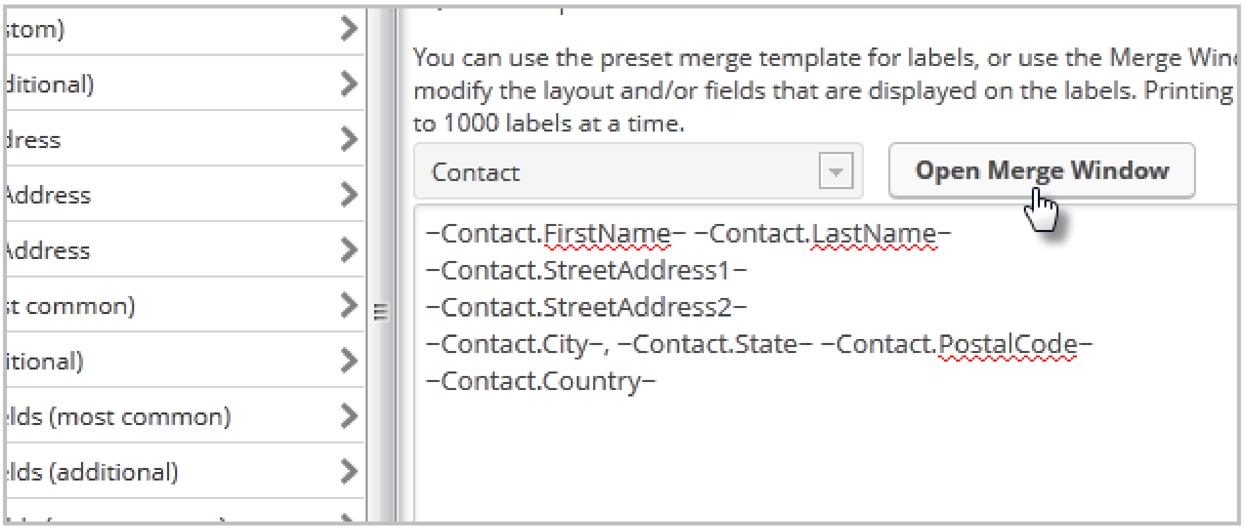
Last Modified on 07/23/2018 12:57 pm MST

You can use Infusionsoft to print a mailing label for one contact or to print mailing labels for a group of contacts. Infusionsoft will create a label document in Microsoft Word with the merge field s already filled and ready to print.

1. Go to **CRM** > **Contacts** in the main navigation.
2. Search for a new list of contacts or select a saved search from the drop-down.
3. Click on the **Actions** drop-down and select **Print Labels**.

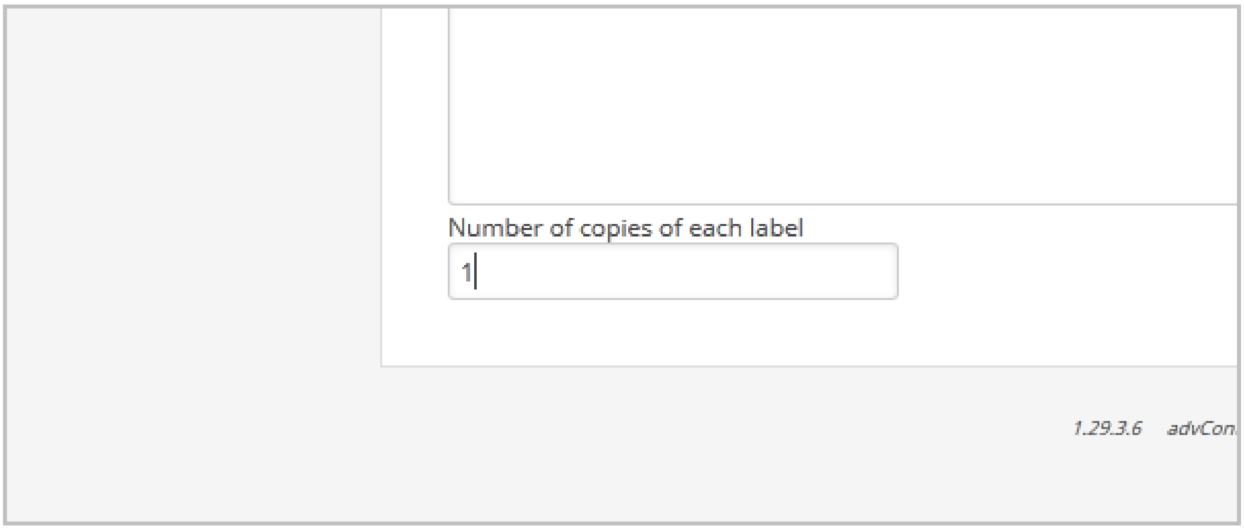


4. Set up your mailing label by clicking on the **Open Merge Window** button and add your merge fields. Remove any merge fields you are not using (e.g. ~Contact.StreetAddress2~.)

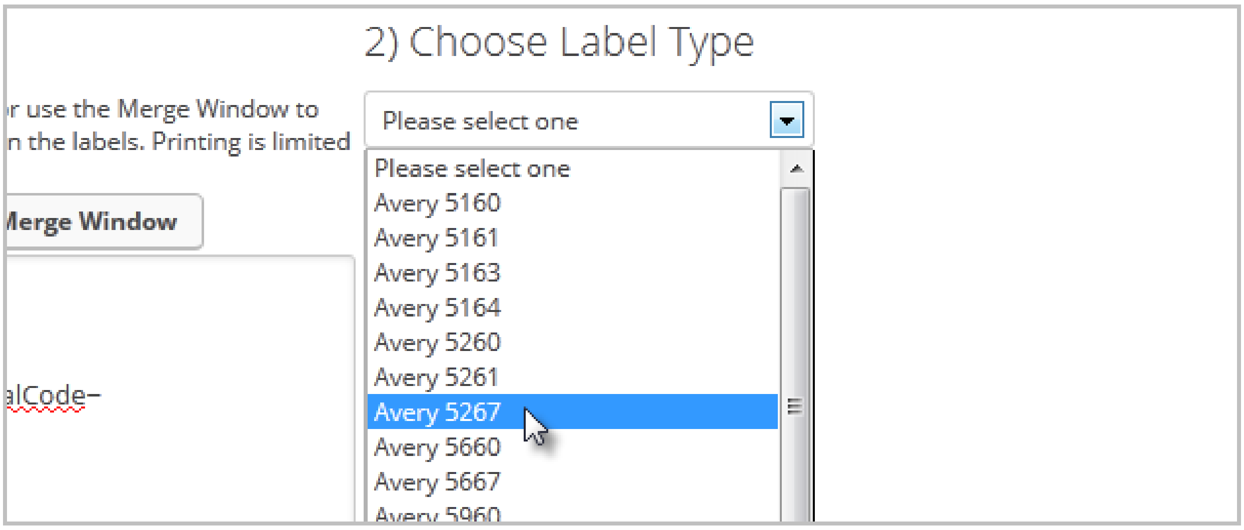


5. Warning! Using a merge field that does not have data or default will create blank spaces on the labels.

6. By default, Infusionsoft will generate one label per contact, but you can change this value if needed.

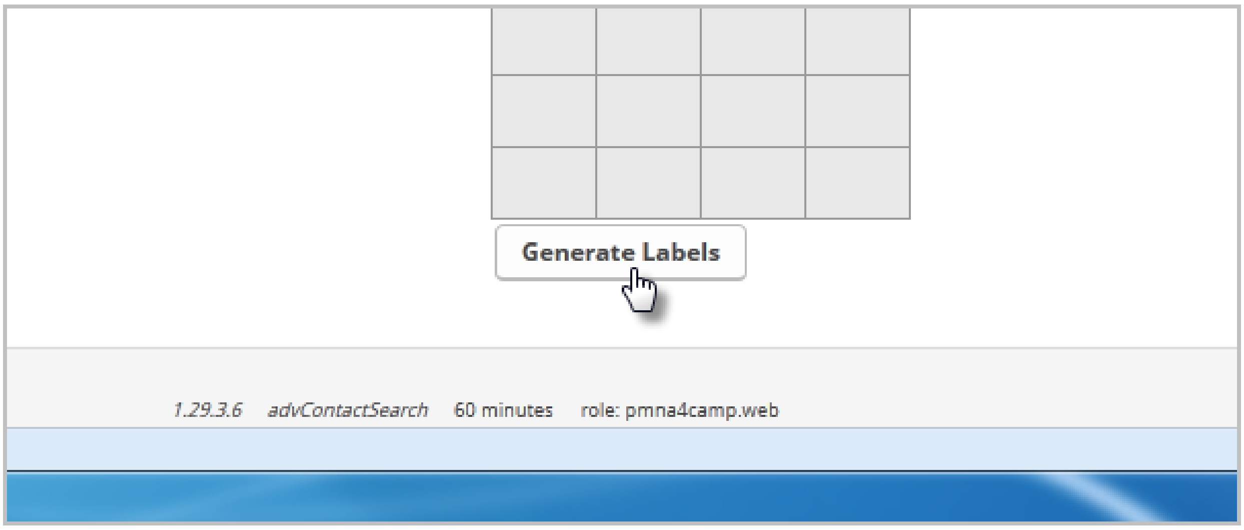


7. Choose a **Label Type** from the drop-down. This list includes common Avery label formats.

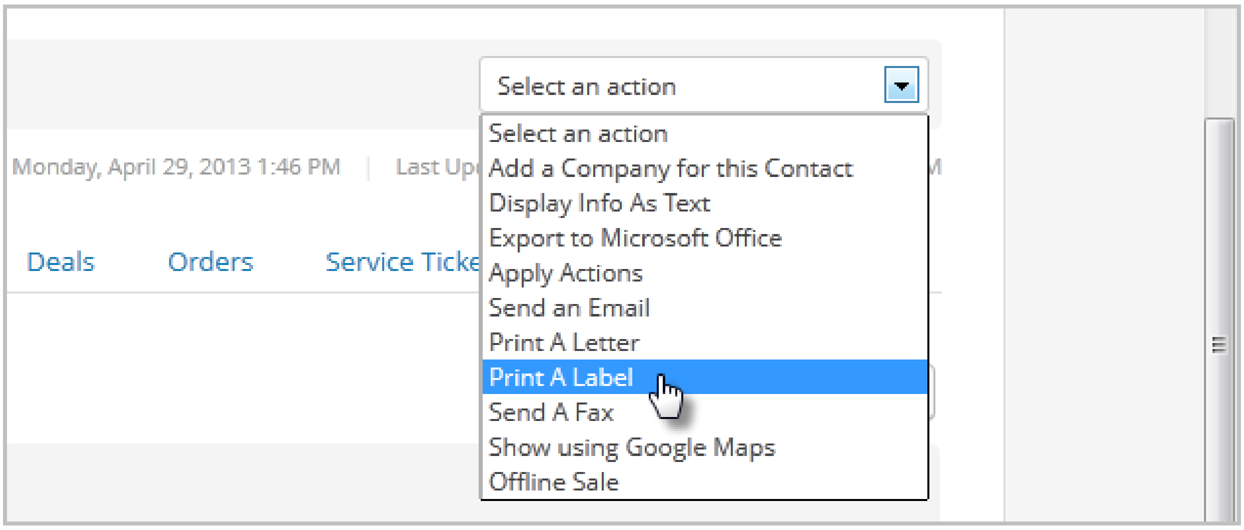


8. (optional) Click on a label location to select the starting label. This allows you to use a partially used label sheet.

9. Click on the **Generate Labels** button and then **OK** to print the labels.



10. Print a Mailing Label for One Contact. While viewing a contact record, click on the **Select an action** drop-down and select **Print a Label**.



11. Follow steps 4 - 8 above.

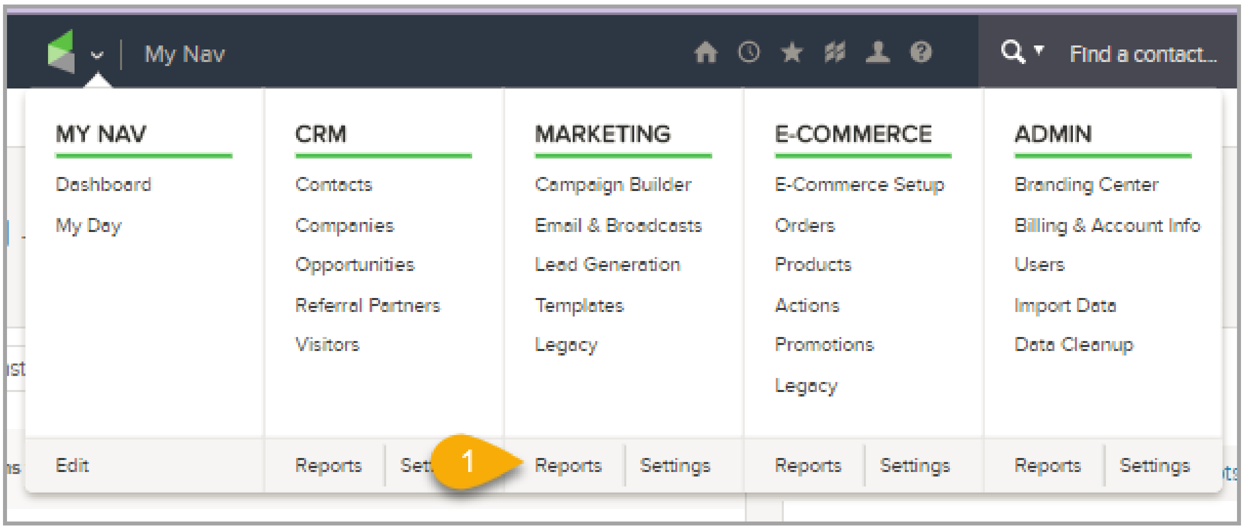
Using a different version of Infusionsoft? Click Here to learn more

Email Status Search

Last Modified on 07/23/2018 12:57 pm MST

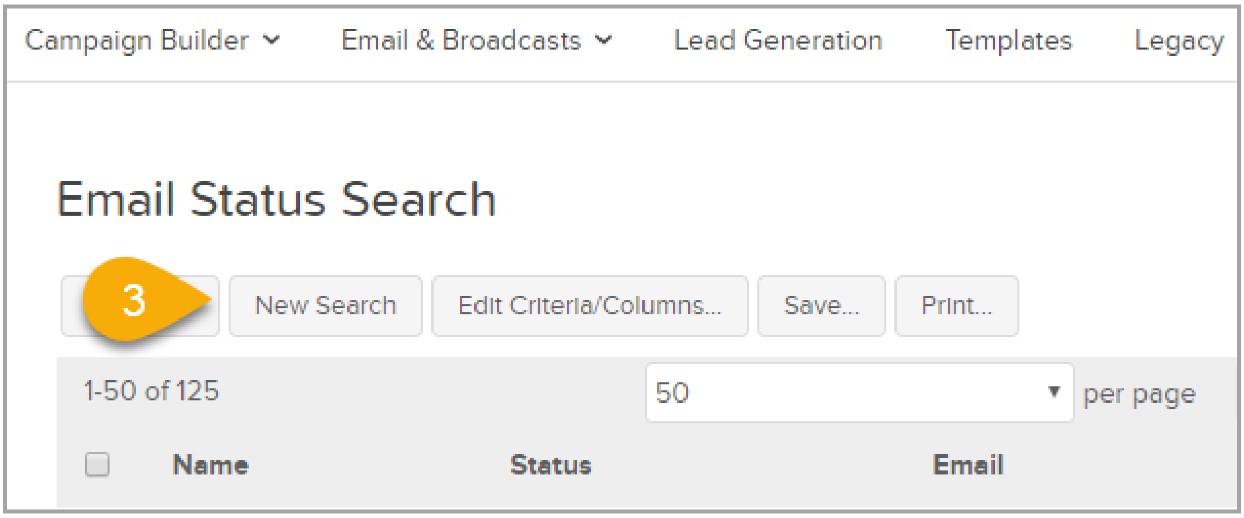
The email status search report displays a list of people based on the status of their email address (i.e. bounce , opt-in , opt-out , etc.). You may use this search to clean up your database or to follow up with people who have bad email addresses in your system. Search by multiple criteria, including email status, last sent date, tags , and more. Click on Opt Status to view additional details.

1. Go to **Marketing > Reports**



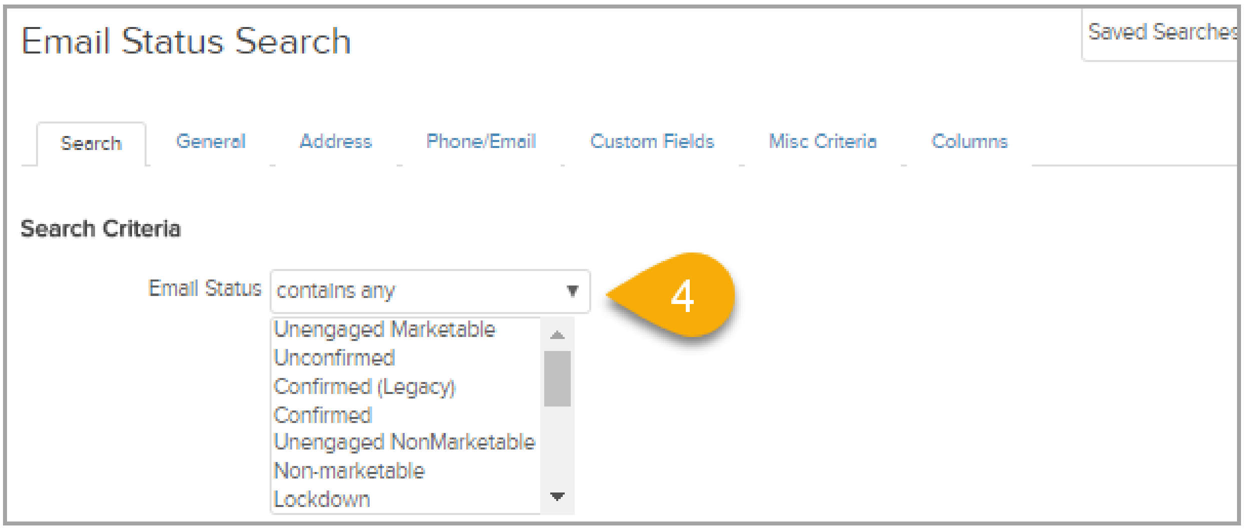
2. Scroll down to **Email Status Search**

3. Click **New Search**

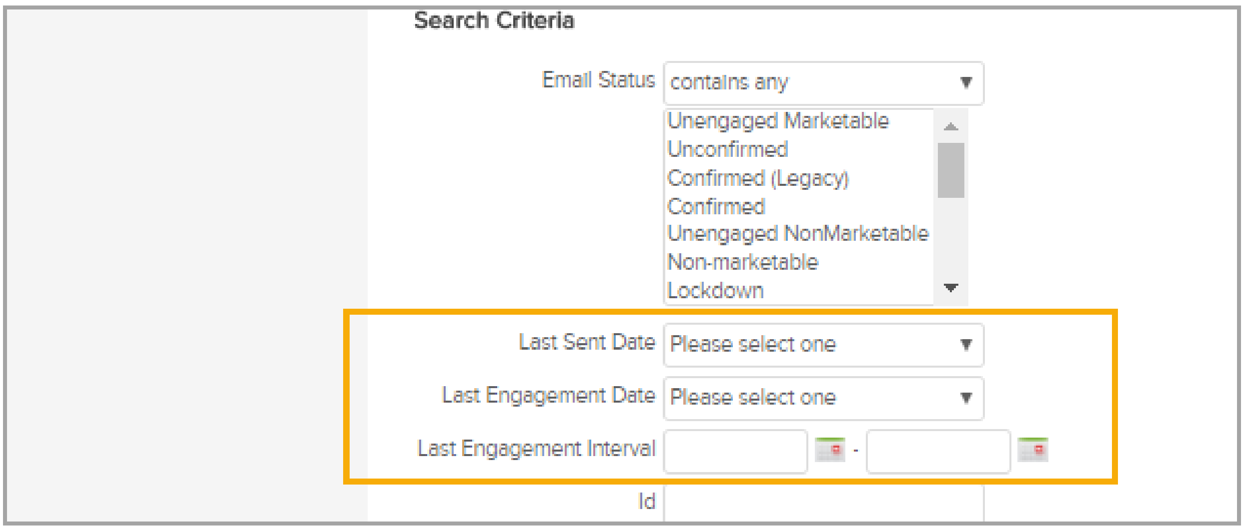


4. Enter your Search Criteria.

   - Email Status

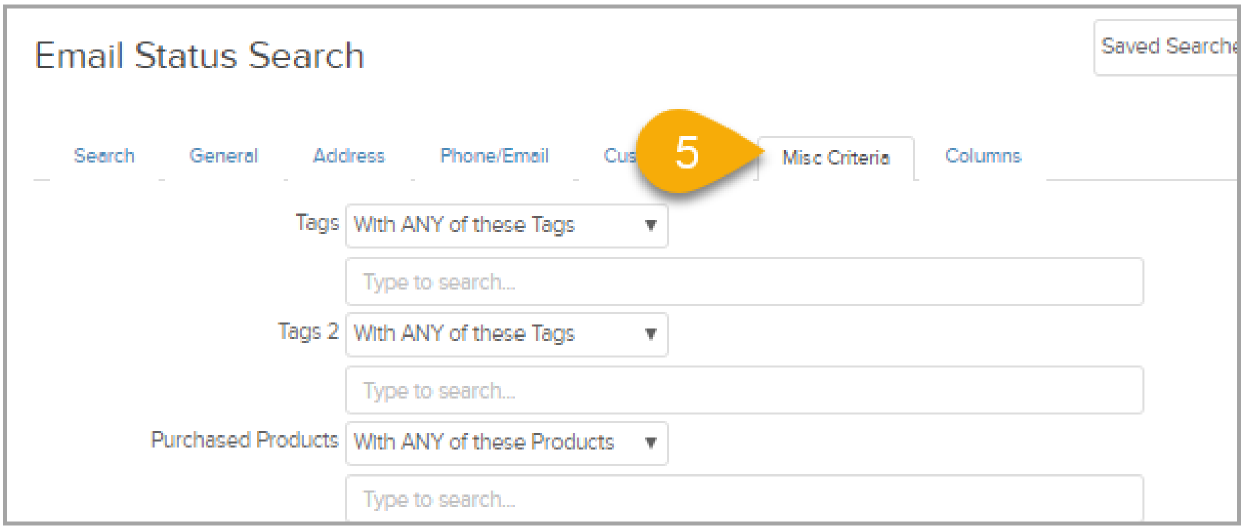


   - Last Sent Date, Last Engagement Date, Last Engagement Interval



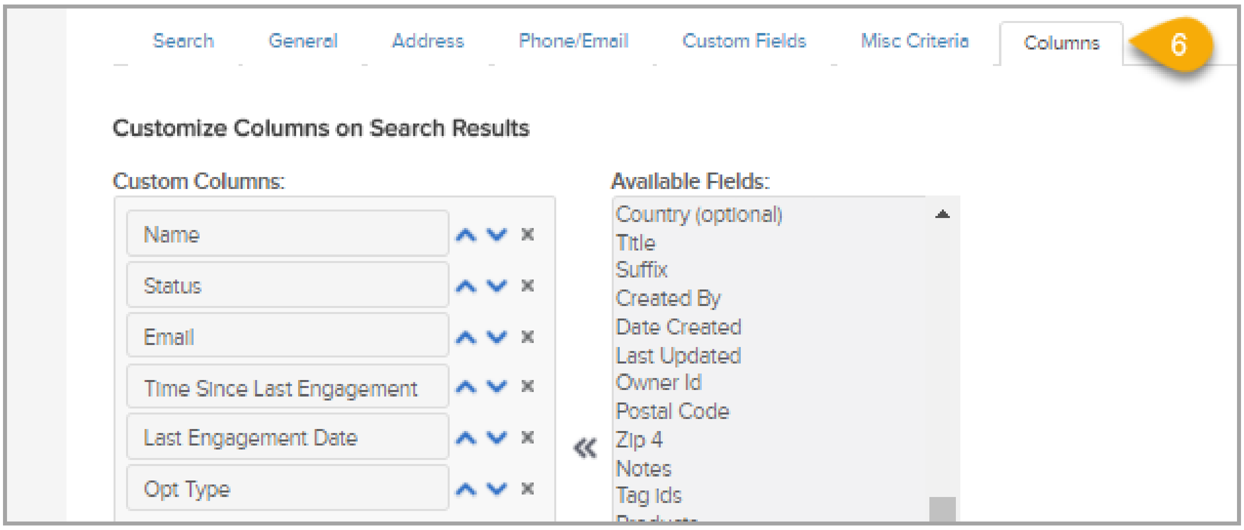
From the "Misc Criteria" tab you have options to:

- Tags
- Products
- Last Open Date
- Last Web Form Submission Date
- Last Web Form Submitted



Customize the results by adding/removing "Columns". This includes

- Name
- Status
- Email
- Opt Type
- Last Engagement Date
- Time Since Last Engagement



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Import Contacts FAQs

Last Modified on 08/07/2018 2:23 pm MST

What data should I import?

Take the time to be thorough. Have an in-depth understanding of exactly what data you currently have. Typically, you only want to bring actionable data over from a previous system. Any data that is not actionable now or in the foreseeable future should be scrutinized. If the data does not provide value to your organization, don't import it. The more data you bring over, the more complex the migration will become.

Clean up your source data

Make sure to spend time preparing your data for the migration. Following this guide will help you avoid common mistakes. If you have data spread across multiple spreadsheets, you will likely need to use functions like Microsoft Excel's VLOOKUP and/or Text To Columns to format your data accurately in excel. If these functions seem overwhelming, it may be a good time to turn this over to experts.

How do I build the structure in Infusionsoft? (Tags vs. Custom Fields)

When your deciding on what method to use to segment data, first ask yourself how you plan on searching for the data and what type of reports would you like to create.

- **Tags** are labels that you can apply to contact records in Infusionsoft. Tags are visible when looking at the contact record. Tags are used as filters in search queries. Many different types of reports allow you to filter by tag. Tags are the most commonly used way to segment data in Infusionsoft. For example, you could search for everyone in your database that has tag *x*, but does not have Tags *y* and *z*.

- **Custom fields** allow a ton of flexibility. You can create many different types of custom fields and merge custom field data into emails to personalize them. If you want to store data in custom fields, take a look at all of the available field types and decide which field type a particular piece of data should use. The best way to determine what type of field to use is to think about **how you want to search for that data when you build a report**. For example, if you are importing a date, you wouldn't want to import dates into text fields or as individual tags; you would want to import them into date fields so you can perform searches based on date ranges. You can add up to 100 custom fields in Infusionsoft. It's fine to build custom fields and import some sample data to see if it meets your needs. You can always delete custom fields and rollback imports. Take the time to test things out to find the optimal way to store your data.

Quality check your data

Search through your data and evaluate the results. If you've made a mistake, or just aren't happy with the results, you can always rollback your imports and rebuild your custom fields and tags. Taking the time to do this right will give you the power to effectively and efficiently slice and dice your data when that time comes.

Using a different version of Infusionsoft? Click Here to learn more

Export From Your Current System

Last Modified on 08/07/2018 2:03 pm MST

Click on the link below to navigate to the "how to export" documentation of the particular vendor.

Most CRM software providers offer a method for exporting data into a CSV (Comma Separated Value) format. If your system exports to a different format, you will need to save it as a CSV prior to importing it into Infusionsoft. The two most common programs for opening and editing a CSV file are Microsoft Excel and Google Sheets .

Also, please let us know below if any of these links are no longer accurate!

ACS	ACT!	Acuity Scheduling	AWeber	Batchbook
Celerant	Constant Contact	Excel	HighRise	HubSpot
iContact	Magneto Go	MailChimp	Maximizer	Microsoft Outlook
Microsoft Access	NetSuite	PipeDrive	QuickBooks	Salesforce
SharePoint	Top Producer	Zoho Creator	Zoho CRM	

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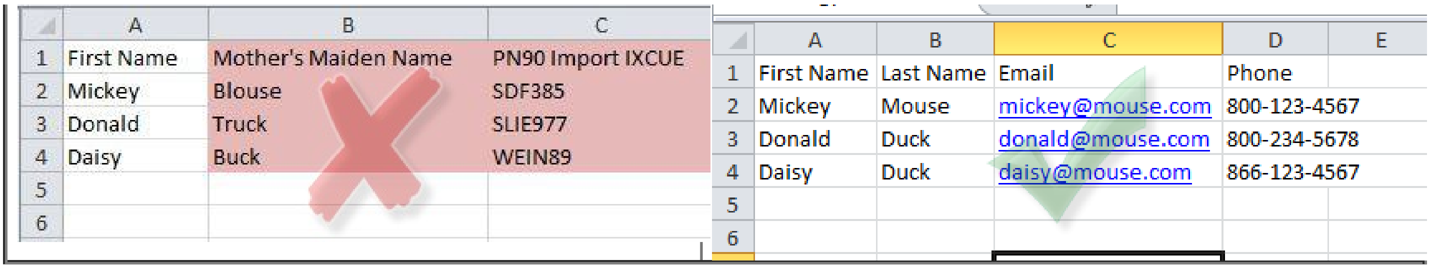
Prepare Your CSV Import File

Last Modified on 08/07/2018 2:03 pm MST

After you export data from your current system(s), you should take time to clean it up before importing it into Infusionsoft. Data must be in a .CSV format; it's the only acceptable file type. Here are a few recommendations that will help your import go more smoothly.

Remove any irrelevant data

Remove duplicate columns and columns that store information you won't need in Infusionsoft to segment, communicate, or produce reports.

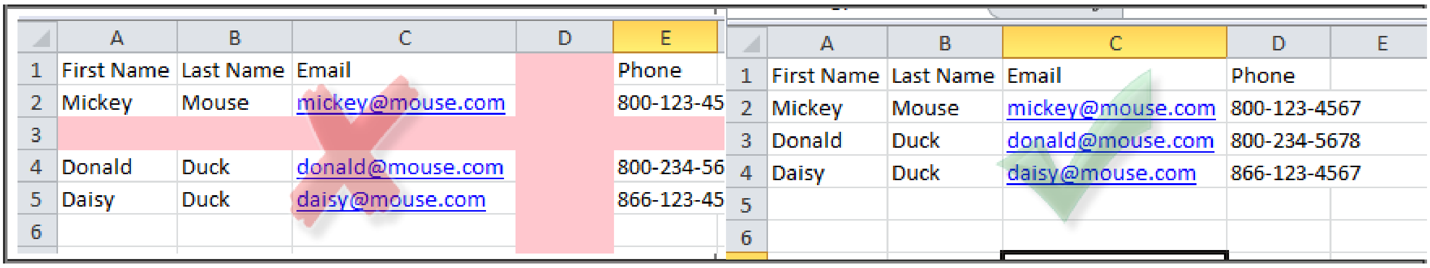


	A	B	C
1	First Name	Mother's Maiden Name	PN90 Import IXCUE
2	Mickey	Blouse	SDF385
3	Donald	Truck	SLIE977
4	Daisy	Buck	WEIN89
5			
6			

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Delete empty rows and columns

Blank rows and columns will corrupt the import.

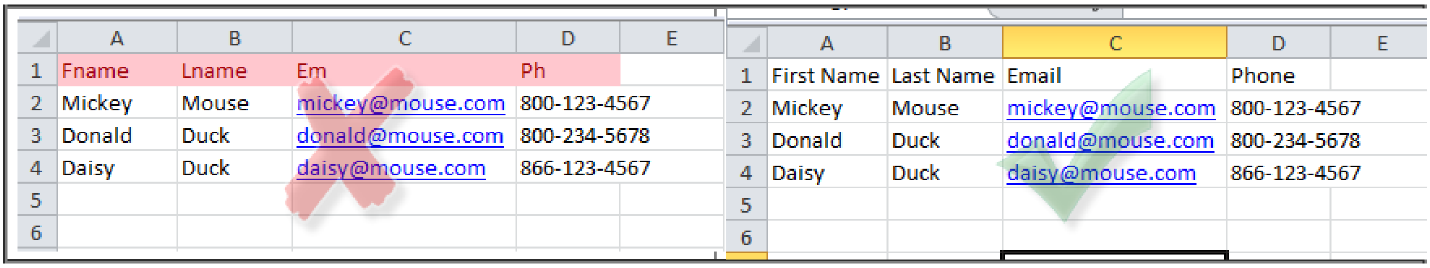


	A	B	C	D	E
1	First Name	Last Name	Email		Phone
2	Mickey	Mouse	mickey@mouse.com		800-123-45
3					
4	Donald	Duck	donald@mouse.com		800-234-56
5	Daisy	Duck	daisy@mouse.com		866-123-45
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Make the column headers clear and concise

If there are any confusing or unclear headers in your data, this can cause data to be imported to the wrong areas.



	A	B	C	D	E
1	Fname	Lname	Em	Ph	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Ensure the column headers accurately describe the column of data

If the headers are wrong, the data will be imported into the wrong areas.

	A	B	C	D	E
1	Fname	Lname	Phone	Email	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Correctly format all dates

MM-DD-YYYY, MM/DD/YYYY, YYYY-MM-DD, and YYYY/MM/DD are all acceptable date formats.

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	November 8th, 1928		
3	Donald	Duck	June 9th, 1934		
4	Daisy	Duck	January 9th, 1937		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	11-08-1928		
3	Donald	Duck	06-09-1934		
4	Daisy	Duck	01-09-1937		
5					
6					

Place multiple phone numbers into separate columns

Multiple phone numbers within a single phone field will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567, 866-800-1234		
3	Donald	Duck	800-123-4568, 866-800-1235		
4	Daisy	Duck	800-123-4569, 866-800-1236		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone 1	Phone 2	
2	Mickey	Mouse	800-123-4567	866-800-1234	
3	Donald	Duck	800-123-4568	866-800-1235	
4	Daisy	Duck	800-123-4569	866-800-1236	
5					
6					

Phone extensions must be in a separate column

Text or an extension within a phone field will cause an improper import.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567 x1		
3	Donald	Duck	800-123-4567 x2		
4	Daisy	Duck	800-123-4567 x3		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone	Phone Ext.	
2	Mickey	Mouse	800-123-4567	1	
3	Donald	Duck	800-123-4567	2	
4	Daisy	Duck	800-123-4567	3	
5					
6					

Addresses must be separated into different columns

A single field for a full address will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Address		
2	Mickey	Mouse	1145 Buena Vista Dr, Lake Buena Vista, FL		
3	Donald	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
4	Daisy	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Street Address	City	State
2	Mickey	Mouse	1145 Buena Vista Dr	Lake Buen	FL
3	Donald	Duck	1145 Buena Vista Dr	Lake Buen	FL
4	Daisy	Duck	1145 Buena Vista Dr	Lake Buen	FL
5					
6					

Fully spell out country names

Abbreviations for countries will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	USA		
3	Donald	Duck	USA		
4	Daisy	Duck	USA		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	United States		
3	Donald	Duck	United States		
4	Daisy	Duck	United States		
5					
6					

Separate multiple tags with a comma (if you want to import a column of data as a tag.)

Any column imported as a tag, without comma separation, will cause erroneous tag names.

	A	B	C	D	E
1	First Name	Last Name	Tags		
2	Mickey	Mouse	Customer;Actor		
3	Donald	Duck	Customer;Actor		
4	Daisy	Duck	Customer;Spouse		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Tags		
2	Mickey	Mouse	Customer,Actor		
3	Donald	Duck	Customer,Actor		
4	Daisy	Duck	Customer,Spouse		
5					
6					

Make sure you are not importing contacts who have opted out of your email marketing!

You will run into SPAM issues if you import people who have opted-out!

Using a different version of Infusionsoft? Click Here to learn more

Import Your Contacts

Last Modified on 07/23/2018 12:16 pm MST

Infusionsoft allows you to import **contacts**, **companies**, **tags**, **products**, and **subscriptions**. The most common import type is a contact import. The process for each type of import is almost identical. Before you import, make sure that your data is in csv (comma delimited) file format and that they have been properly prepared.

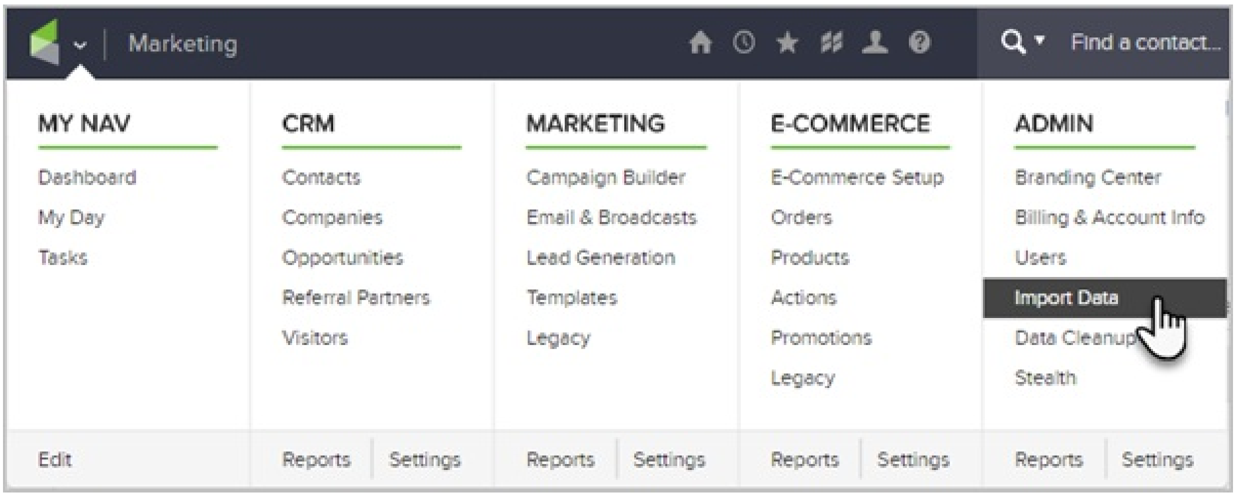
Click on the links below to view the sample.csv files:

- Contacts
- Contacts with Credit Cards
- Companies
- Tags
- Products
- Subscription Programs

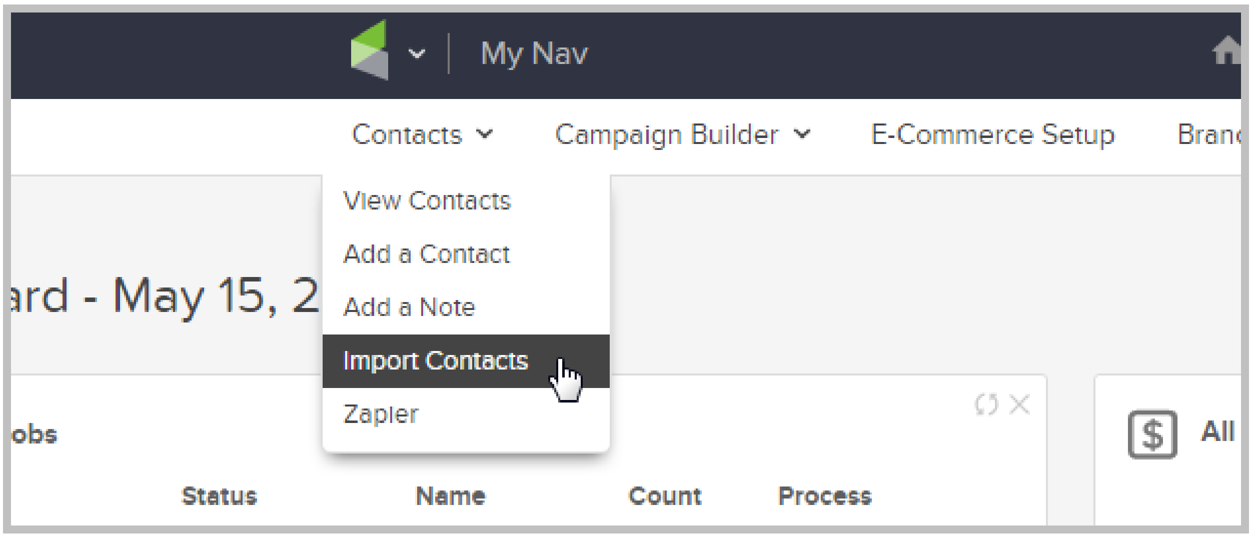
Pro Tip! Need to import UTF-8 Characters? Imports with UTF-8 characters will fail if the file was created or edited using Microsoft Excel. Instead, you can paste your excel spreadsheet to a Google Sheet

1. Open your Excel file, select all data and copy (CTRL-C).
2. Open Google Sheets and paste your data into a new Sheet (CTRL-V).
3. Save your Google Sheet as a CSV file (top left corner in Sheets: File > Download As > Comma-separated values (.csv , current sheet)
4. Navigate to Infusionsoft and import the CSV file you just saved from Google Sheets through the import tool. Be sure to not open the newly saved CSV file in Excel after saving.

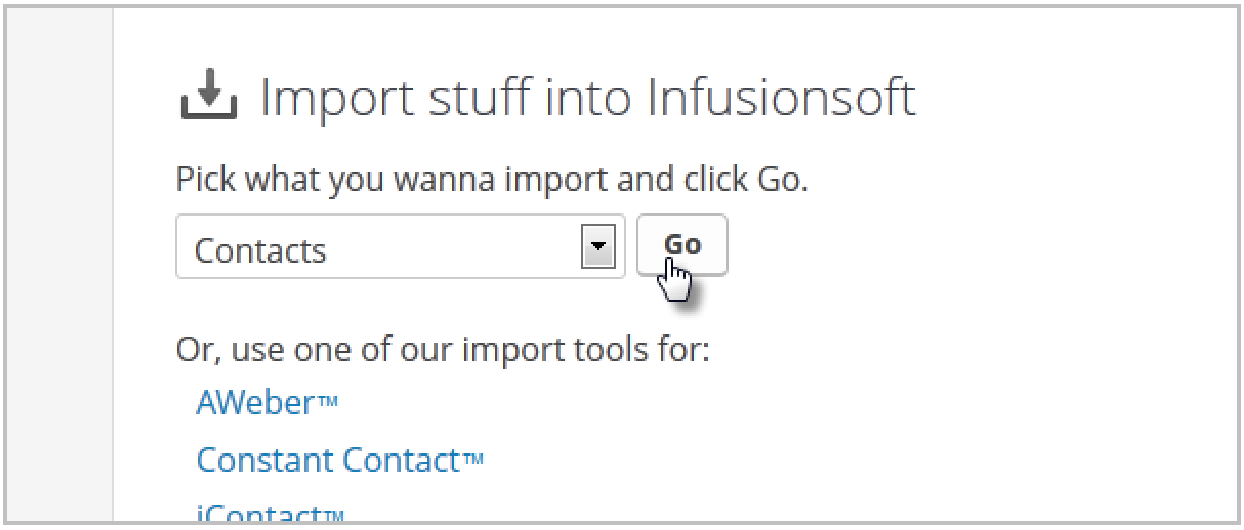
1. Go to **Admin** > **Import Data**



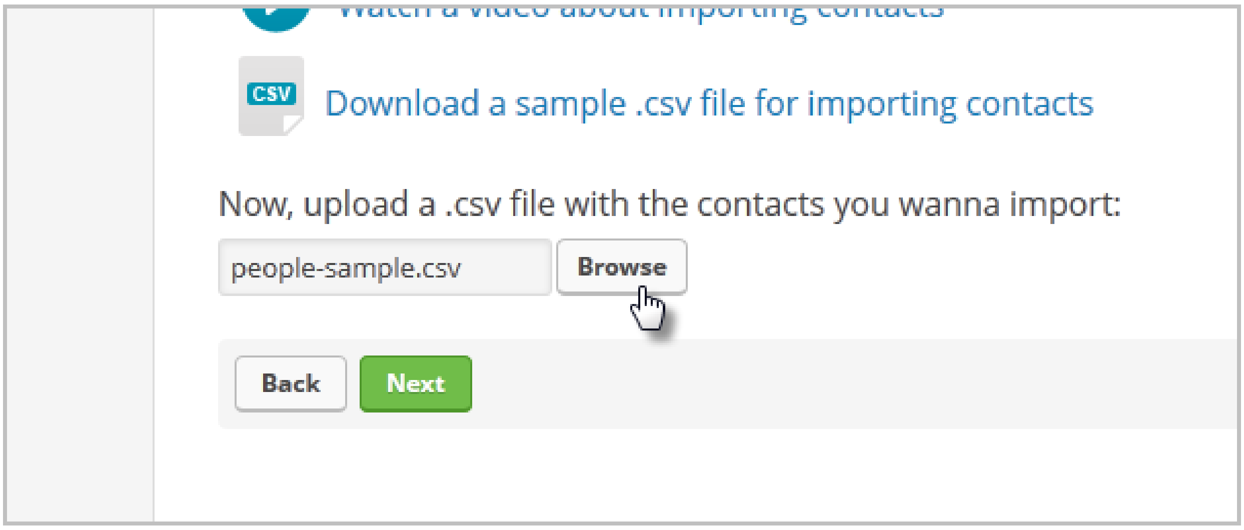
2. Or **CRM** > **Contacts** and then select **Import Contacts** from the Contacts menu.



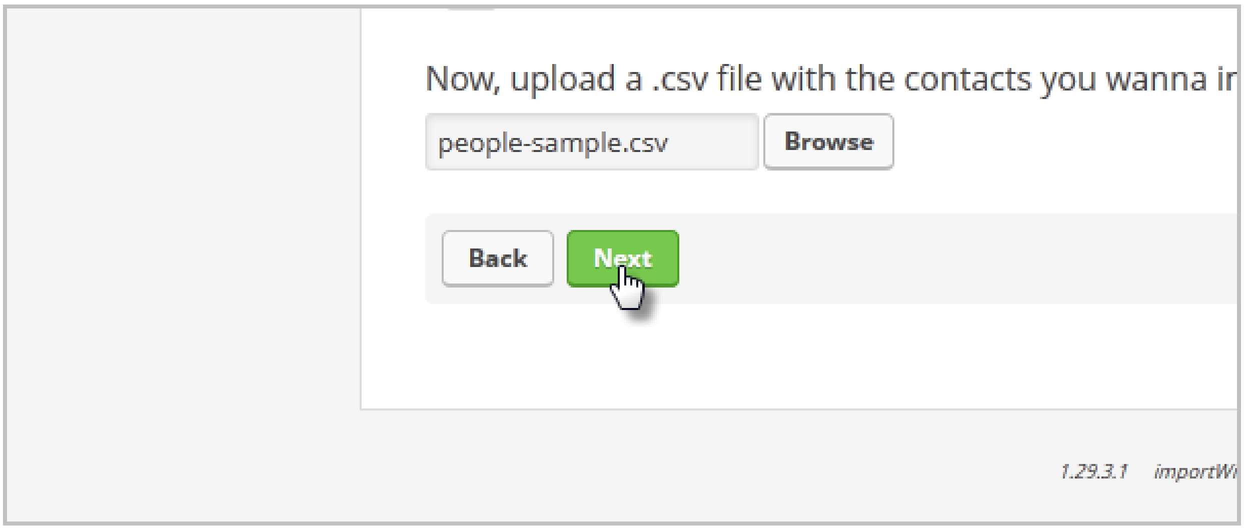
3. Select **Contacts** and click **Go**.



4. Click on **Browse** to select a csv file from your computer.

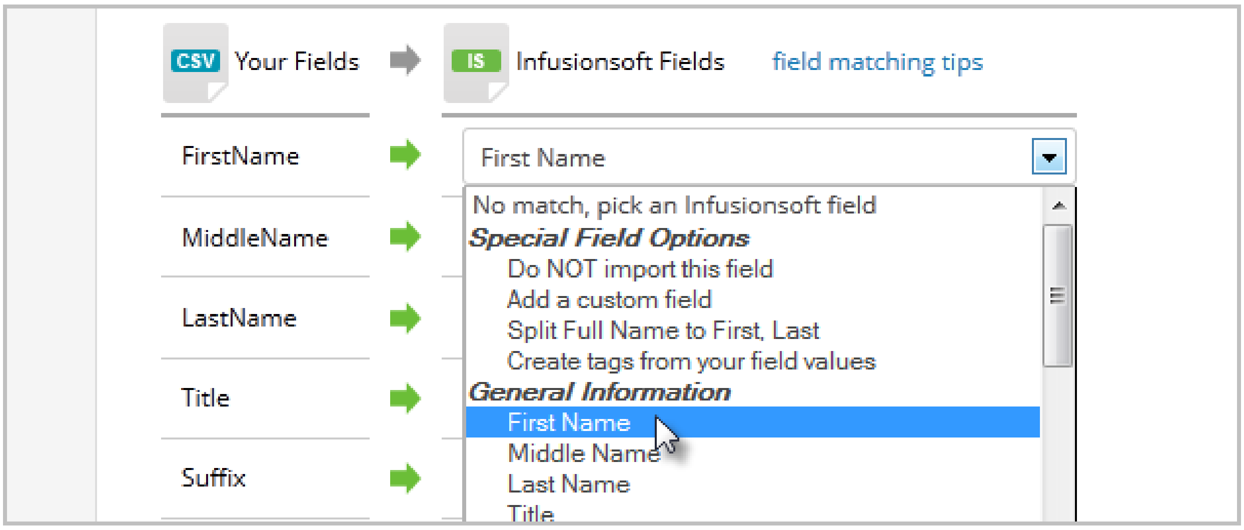


5. Click on **Next** to start the import wizard.

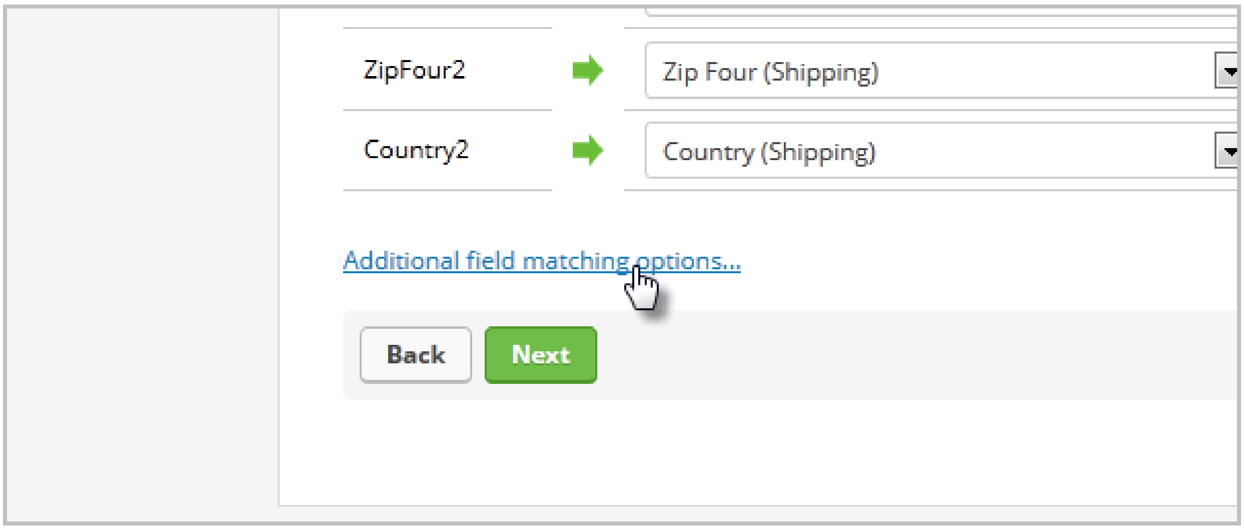


6. Match the fields. The field name from your spreadsheet is on the left column. The

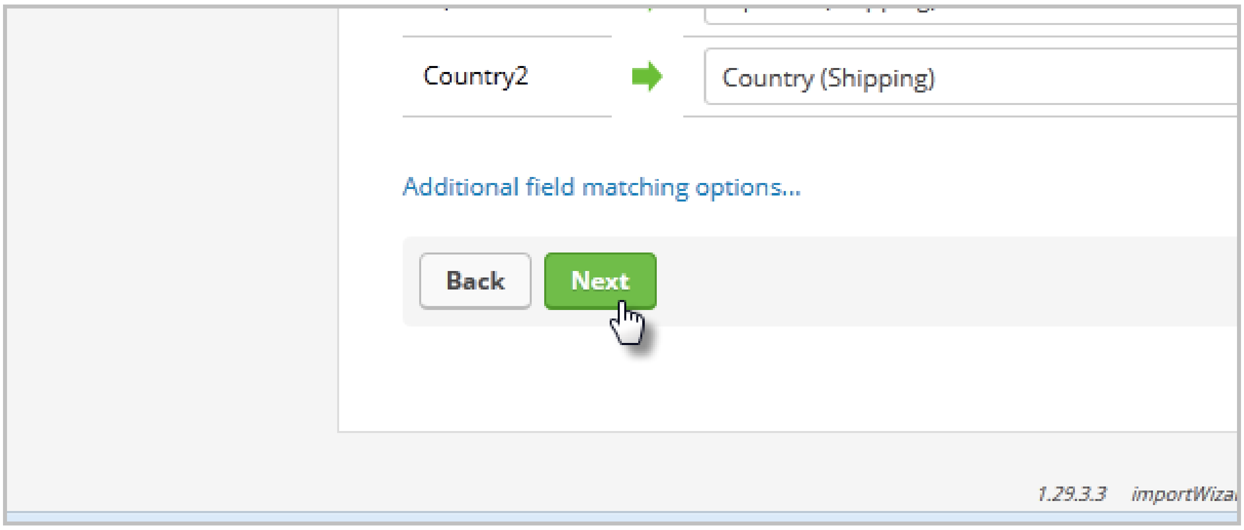
Infusionsoft field name is on the right. Select the matching Infusionsoft field from each drop-down. If a matching field is not listed, you can create a custom field or select Do not Import this field to omit the field from the import.



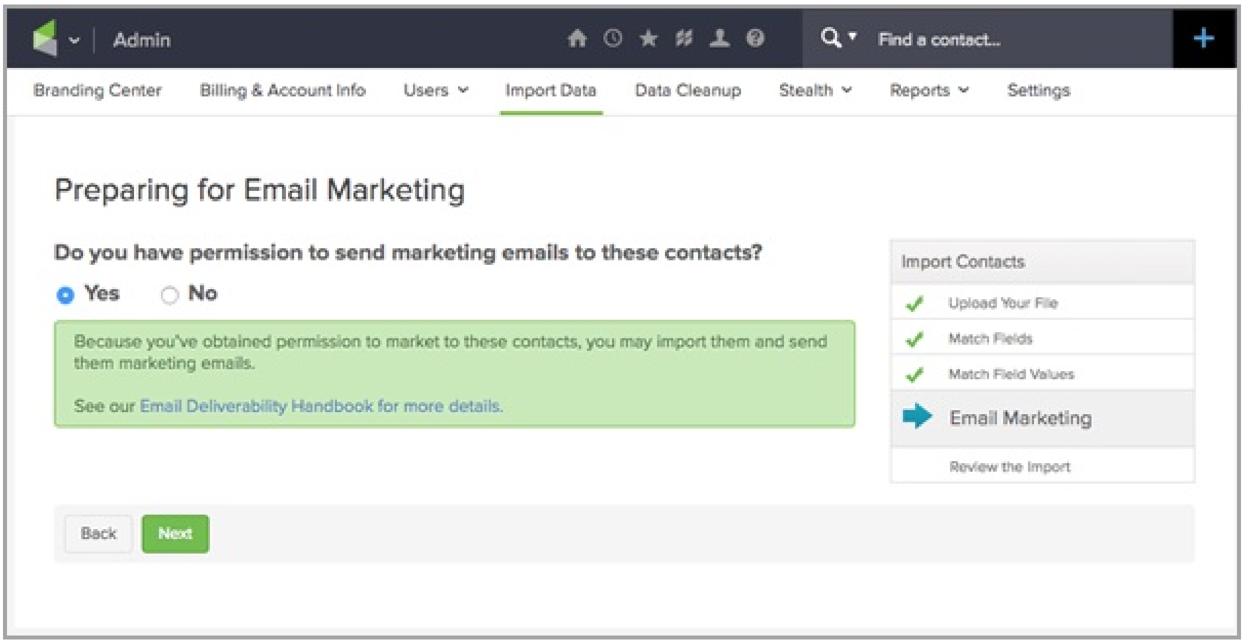
(Optional) Match field values for the multi-choice fields (e.g. drop-downs or select lists). Select a matching Infusionsoft field from each drop down. If you need to populate multiple Infusionsoft fields with data from one spreadsheet, click on the Additional Field Matching Options link at the bottom of the page.



7. Click **Next** when you have finished mapping your fields.



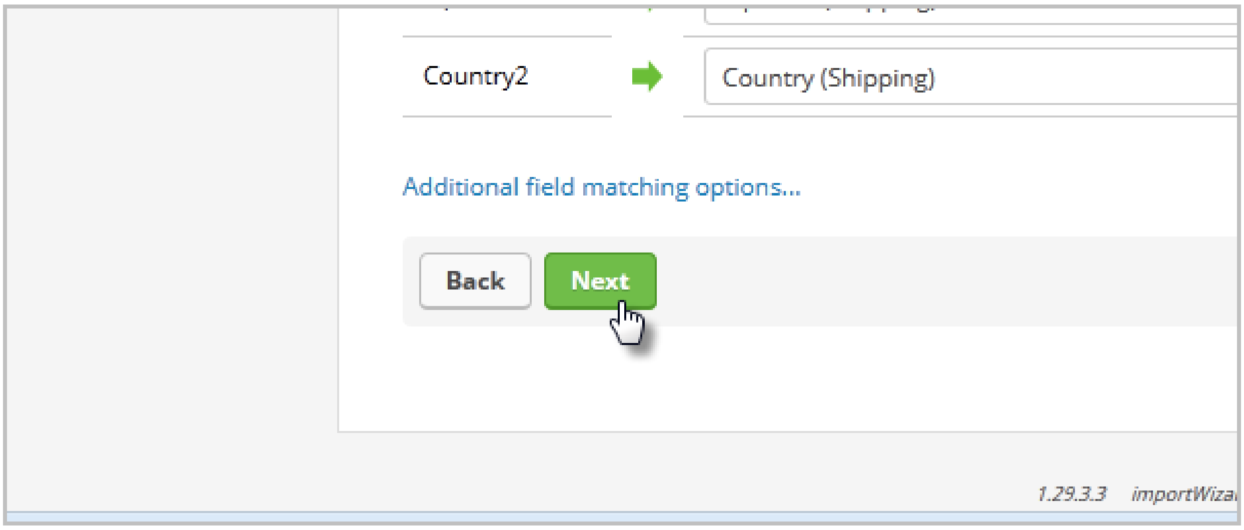
8. Confirm Explicit Permission to send email. Read through the permission guidelines and choose *Yes* or *No*.



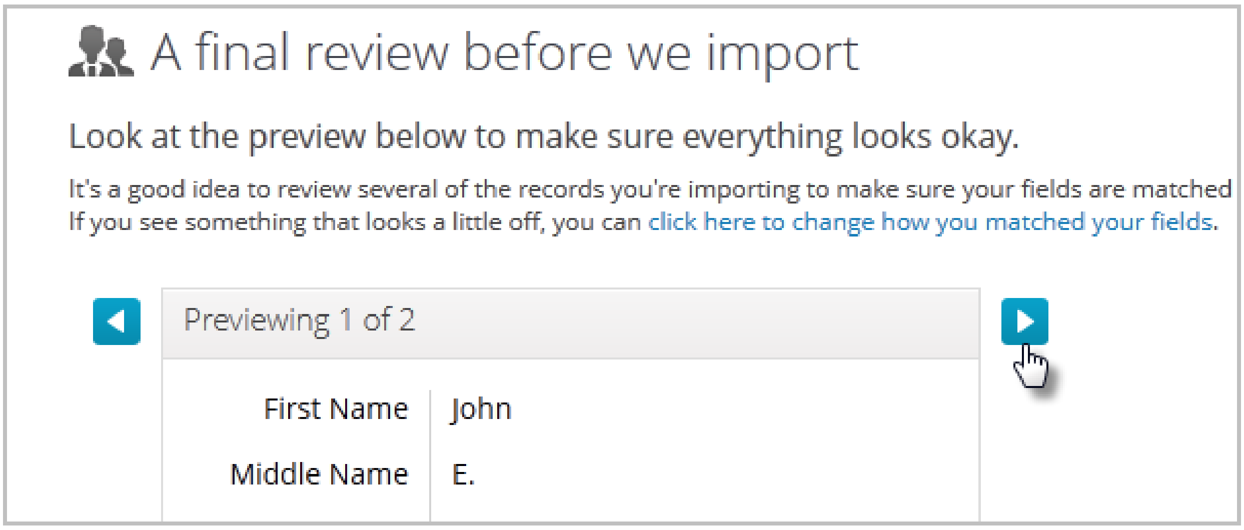
No - These contacts will be imported with the email status of Non-Marketable which means you will still be able to send them individual emails. You will not however be able to use these contacts in Email Broadcasts or Campaigns. Read more on Email Status

Yes - When you select Yes, you are agreeing to the Infusionsoft Acceptable Use Policy and are required to answer a series of questions regarding how you obtained the list you are importing. This information will be reviewed by our compliance team.

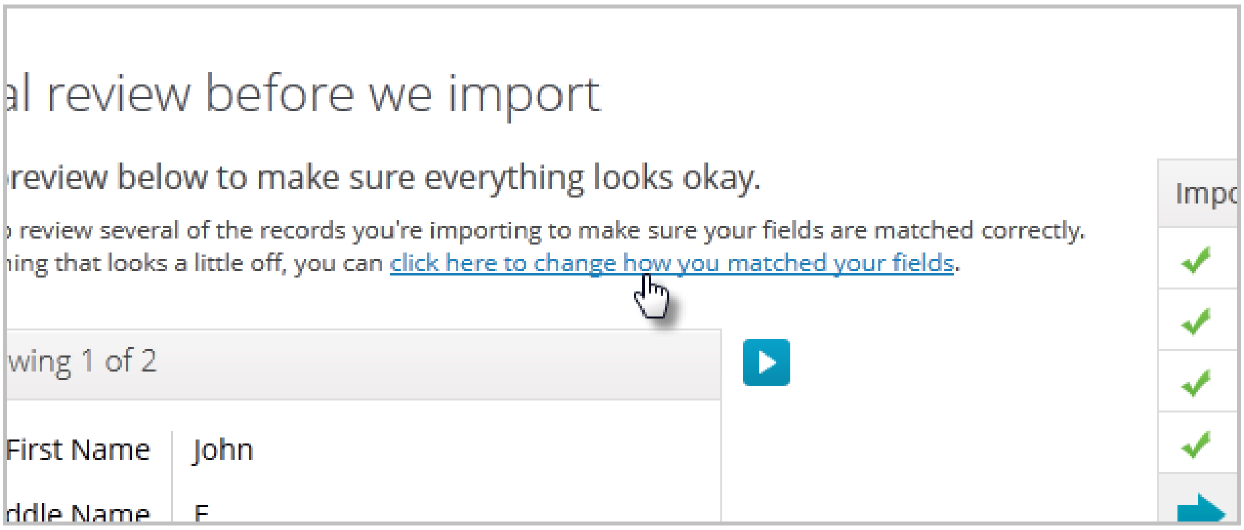
9. Click **Next** after you have successfully answered the questions. If some information is missing or incomplete, you will be alerted to provide more information.



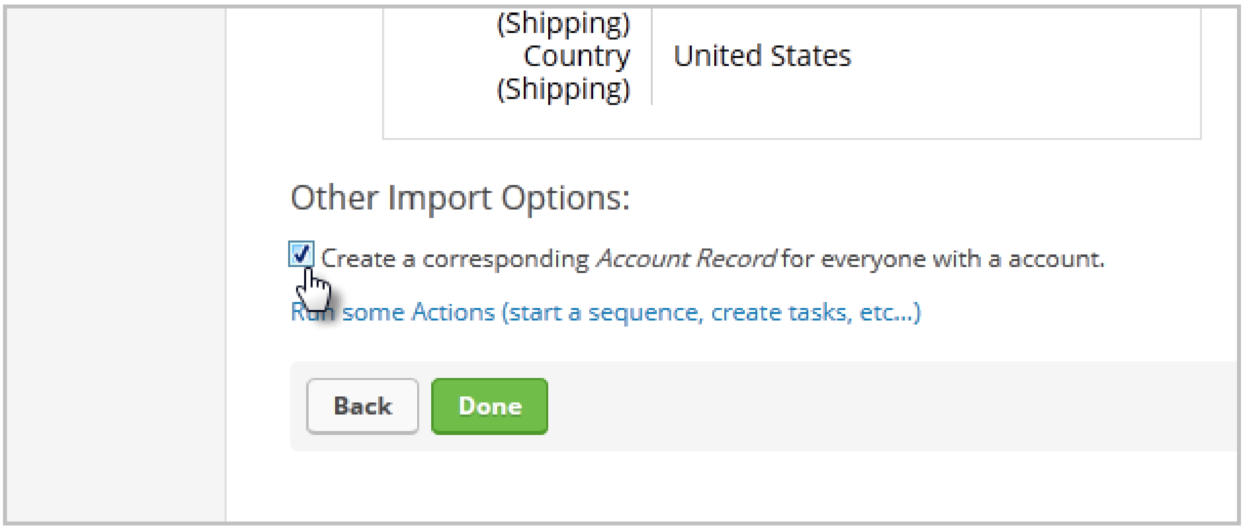
10. Review your import. Click on **Previous** or **Next** to scroll through a few of the records to verify you matched the fields properly.



11. (Optional) If you make a mistake, click the link to make changes to the field mapping before proceeding.



12. **Pro Tip!** You can mark the checkbox to create or add contacts to an existing company record that has a company name in the company field. Every contact that belongs to the same company will be grouped together in the same company record. **Please Note** that any **spelling variation** in a company name will create multiple companies records. For example, Infusionsoft and Infusionsoft Software would create two separate companies.



13. Click on **Done** to begin the import

14. (Optional) Upon completing the Import, you have the option to view the list you imported, send them a broadcast, and/or save the import settings. When you save the Import settings, the system will store the field matches and the actions you assigned to the import (see #9). Using a saved import allows you to skip some import steps when you import the same kind of list in the future.

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Create Company Records During An Import

Last Modified on 07/23/2018 12:16 pm MST

If you sell to business accounts, you may want to create and use company records to link together the contacts who work for the company and to see an account activity summary. There are 2 options for creating company records during import:

Before you import, follow these steps to prepare the list for creating company records:

1. The system creates a unique company record based on the company name listed in the spreadsheet. You may need to clean up your spreadsheet before importing to make sure the company names are consistent. (e.g., Get More Leads Mktg and Get More Leads Marketing,Inc. will generate 2 different company records). If the names are inconsistent, the system will create duplicate company records.

2. If you work with companies that have the same or similar names (e.g., franchises), you need to differentiate before you import (e.g. Keller Williams - NW and Keller Williams - Central.) If you just use Keller Williams, all people associated with either branch will fall under one company record.

3. (Company Import Only) Customize the company records. If you choose option #2, then you can add custom fields to the company record to store account-level information (e.g., buyer name or primary contact.) You can also add custom fields to company records during the import process.

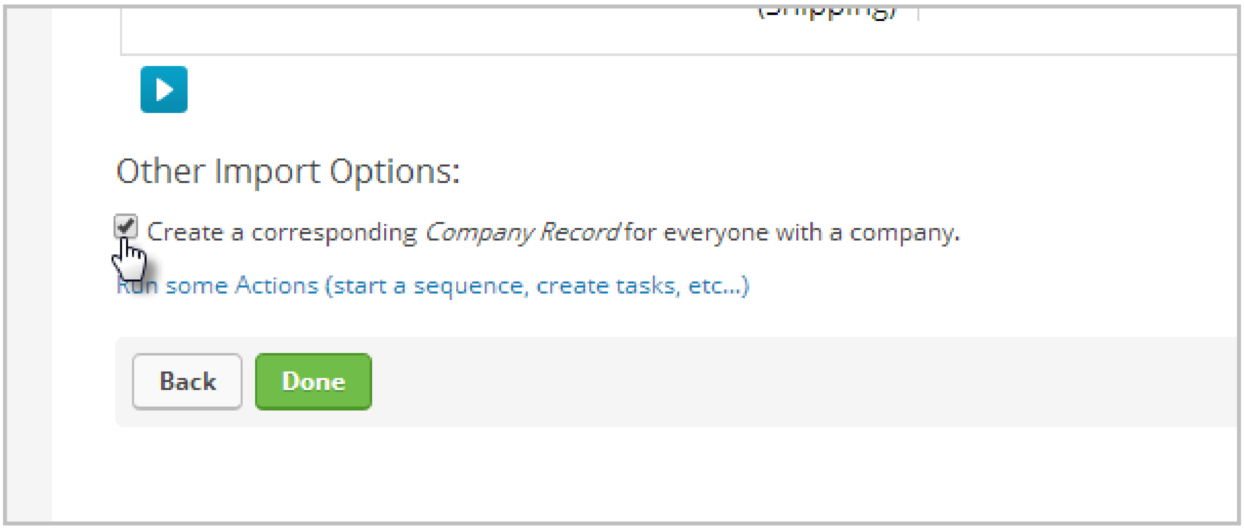
4. Your list must include multiple people with the same company name. If it doesn't then you may not need to create company records.

5. Your file must be in CSV format.

6. Your user permissions must allow you to add and manage company records. If you cannot do this, contact your company's Infusionsoft system admin to ask for help.

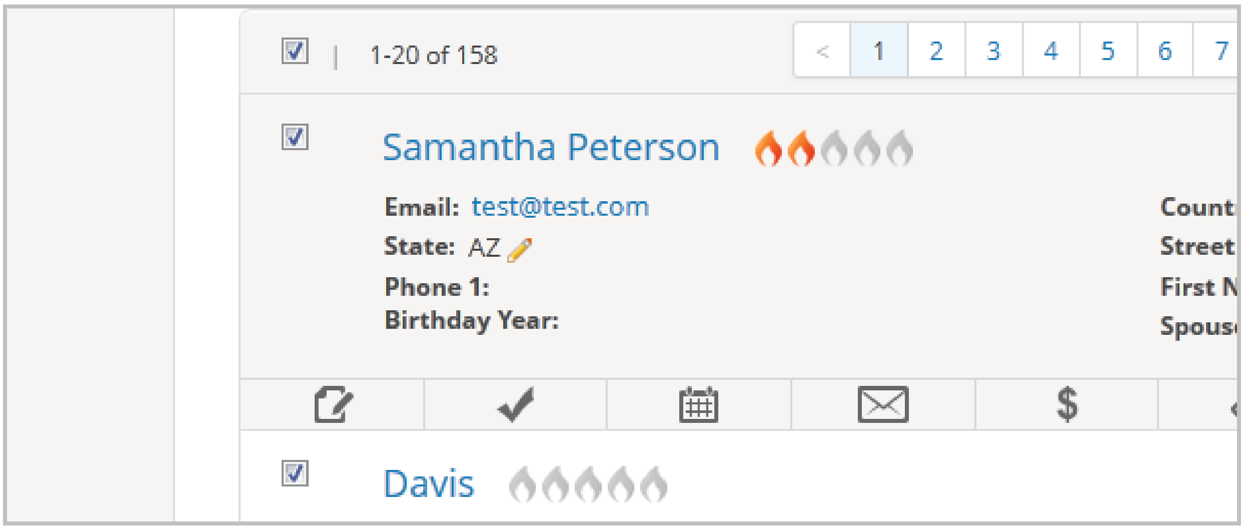
Create Companies When You Import Contacts

On the 'Review' step of the import process, mark the checkbox to create company records during the Import.

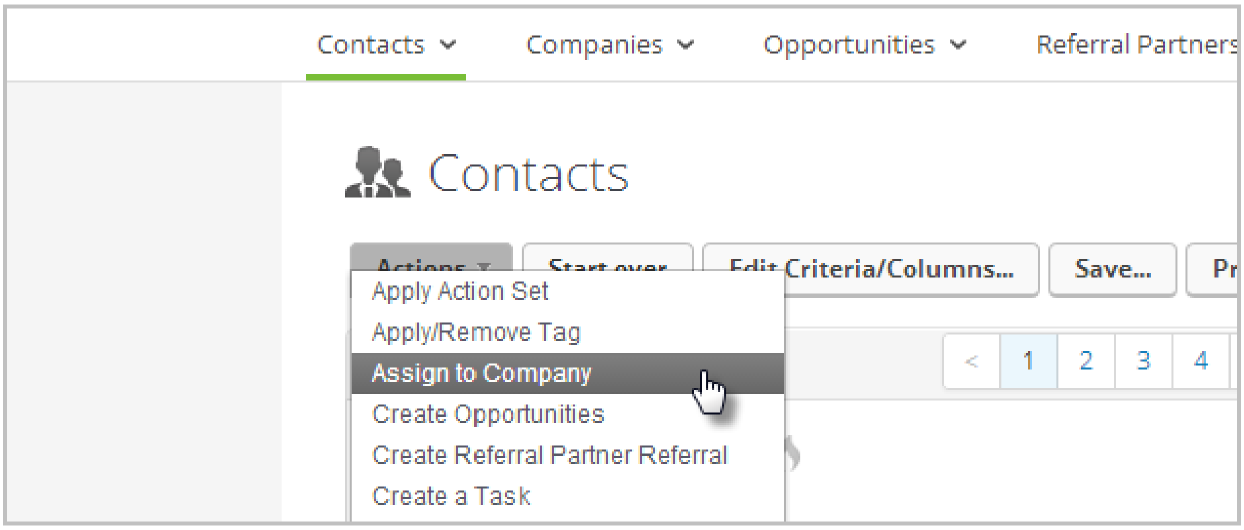


Import Companies and Batch Assign Contact Records

After you have imported your companies, go to CRM > Contacts to search for a list of contacts associated with a specific company. Possible search ideas include email address, street address, phone, etc... Mark the check-boxes beside the contacts of the company.

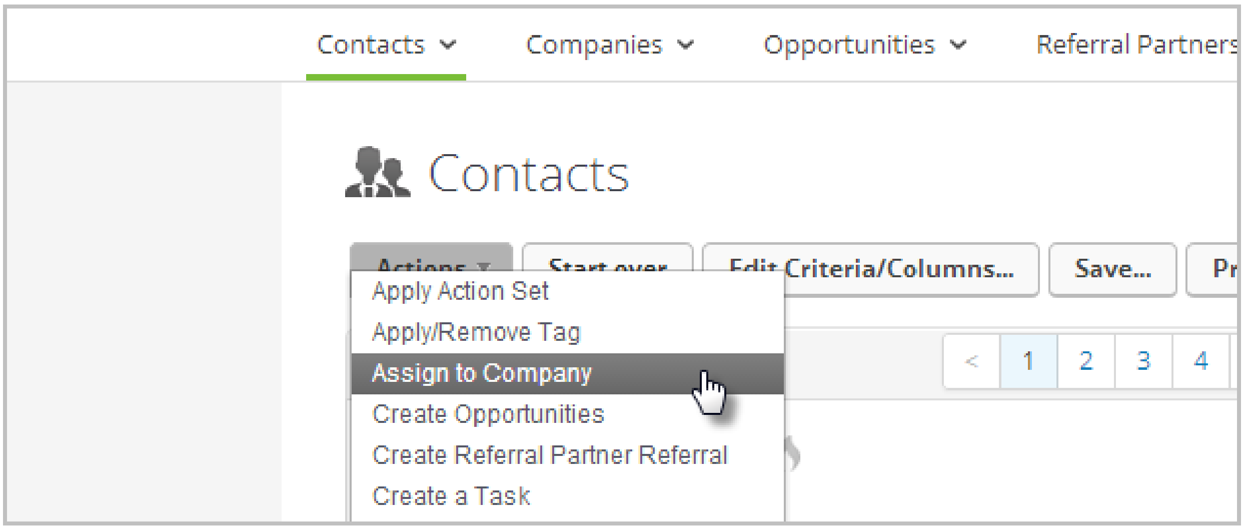


1. Click on **Actions** and select **Assign to Company**.



2. Click on **Search** to find and select the correct company record.

3. Click on **Process Action** to attach the selected contacts to the company.



4. Repeat this process for each company you created during the import.

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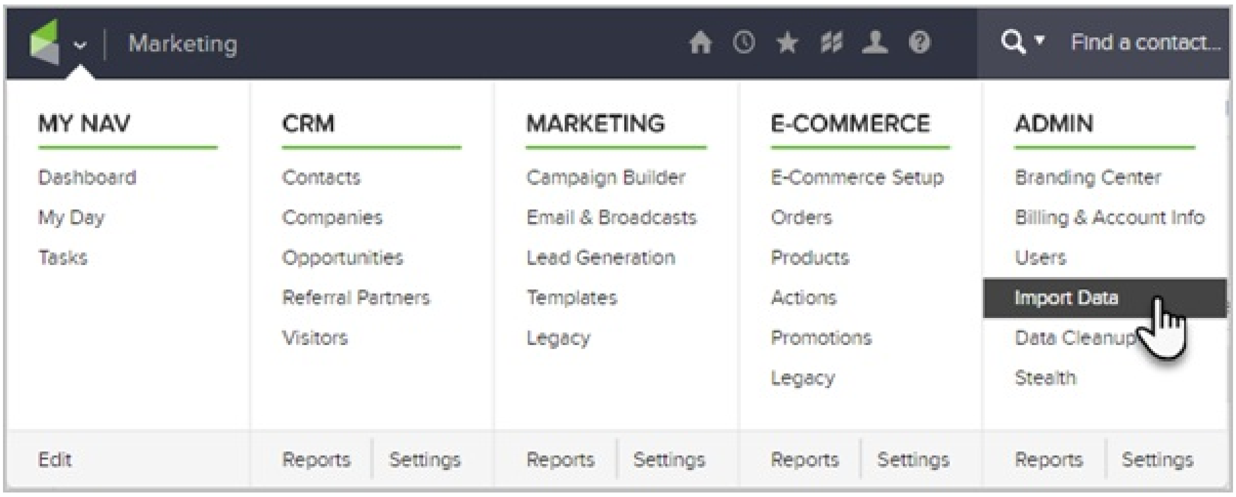
View and Rollback Imports

Last Modified on 07/23/2018 12:17 pm MST

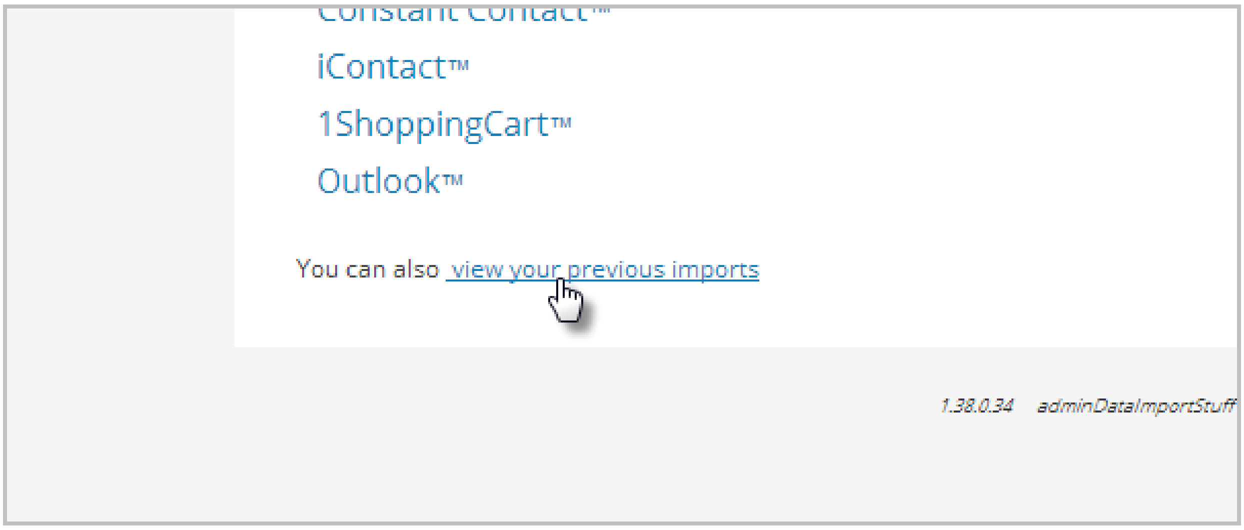
After you import a list of contacts into Infusionsoft, you may need to view the list, run Actions on the list of people you imported, or delete the list so you can fix data issues and import again.

1. Go to **Admin** > **Import Data** in the main navigation menu

2. Select **Import Contacts** from the Contacts menu



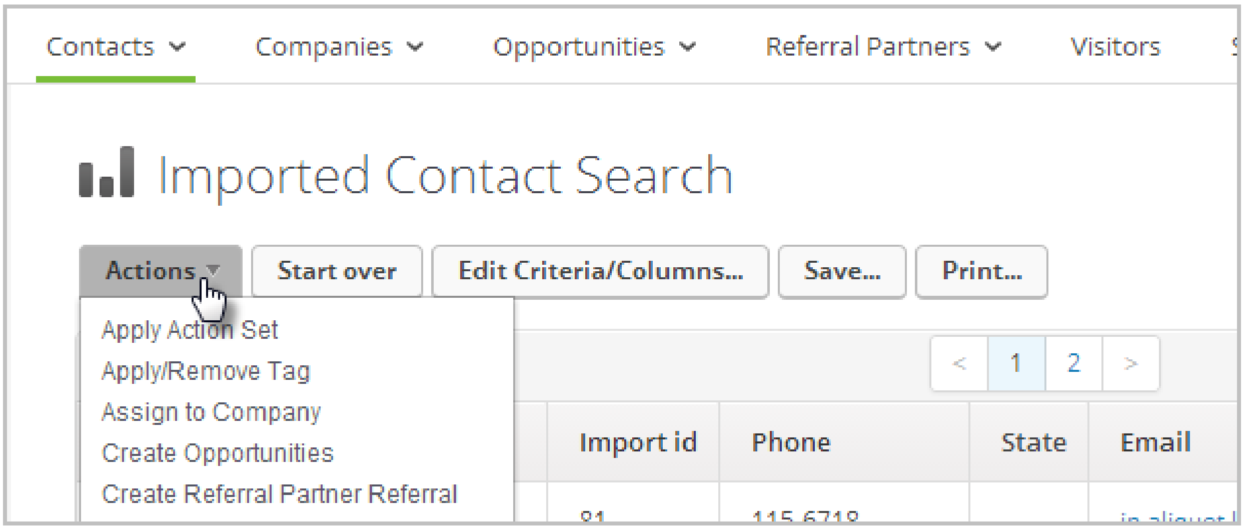
3. Click on **view your previous imports**



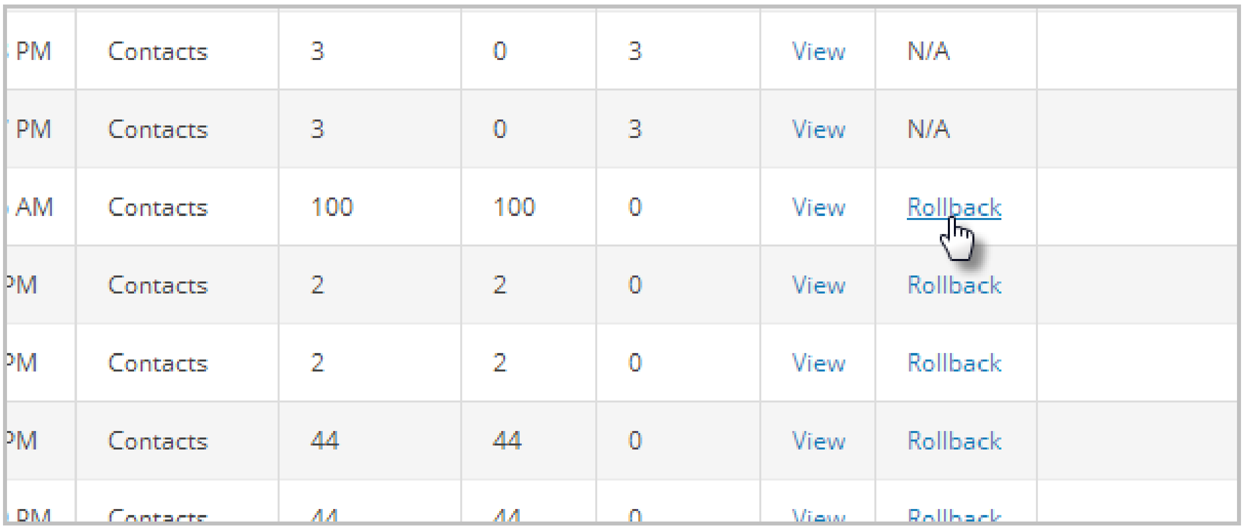
4. Find the import and click on **View**

04/09/2014 12:58 PM	Contacts	3	0	3	View	N/A
04/09/2014 12:57 PM	Contacts	3	0	3	View	N/A
03/28/2014 11:56 AM	Contacts	100	100	0	View	Rollback
02/11/2013 4:48 PM	Contacts	2	2	0	View	Rollback
02/11/2013 4:23 PM	Contacts	2	2	0	View	Rollback
08/20/2012 1:05 PM	Contacts	44	44	0	View	Rollback
08/20/2012 12:59 PM	Contacts	44	44	0	View	Rollback

5. (Optional) Click on the **Actions** button to run actions on this list (e.g., apply / remove a tag.)



6. If there are issues with the data you imported and you need to start over, click on the **Rollback** link to remove the list you imported.



PM	Contacts	3	0	3	View	N/A	
PM	Contacts	3	0	3	View	N/A	
AM	Contacts	100	100	0	View	Rollback	
PM	Contacts	2	2	0	View	Rollback	
PM	Contacts	2	2	0	View	Rollback	
PM	Contacts	44	44	0	View	Rollback	
PM	Contacts	44	44	0	View	Rollback	

Be Careful! When you rollback an Import, you will delete the history and all data included in the import. If you've already merged duplicates, then rolling back the import will delete the merged person, causing you to lose the history in both the original record, and the record you imported more recently.

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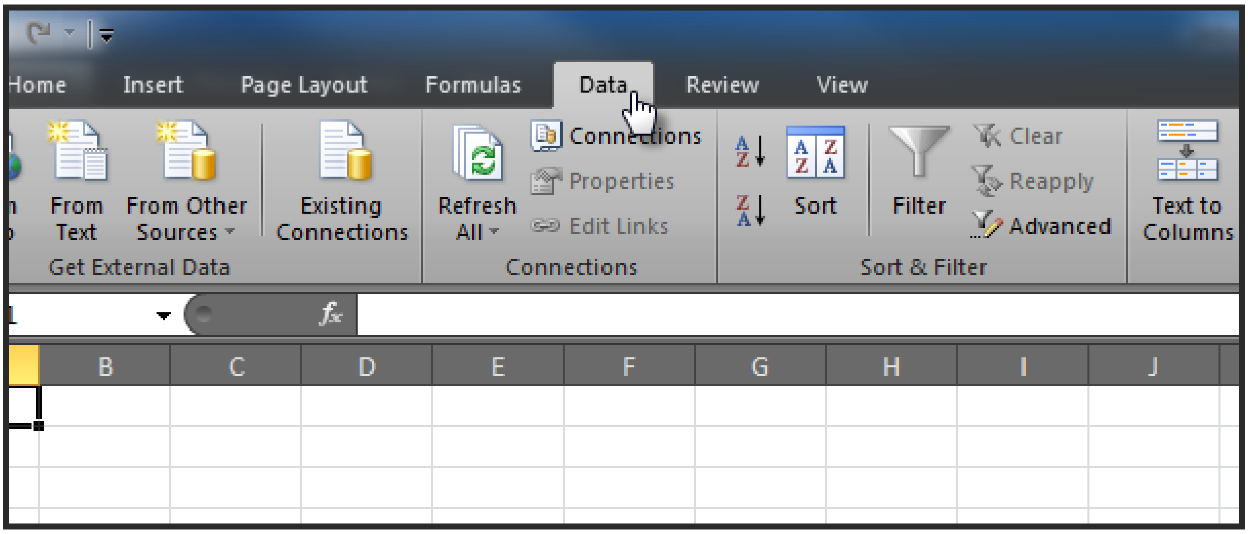
Working With Credit Card Numbers in Excel

Last Modified on 07/23/2018 12:18 pm MST

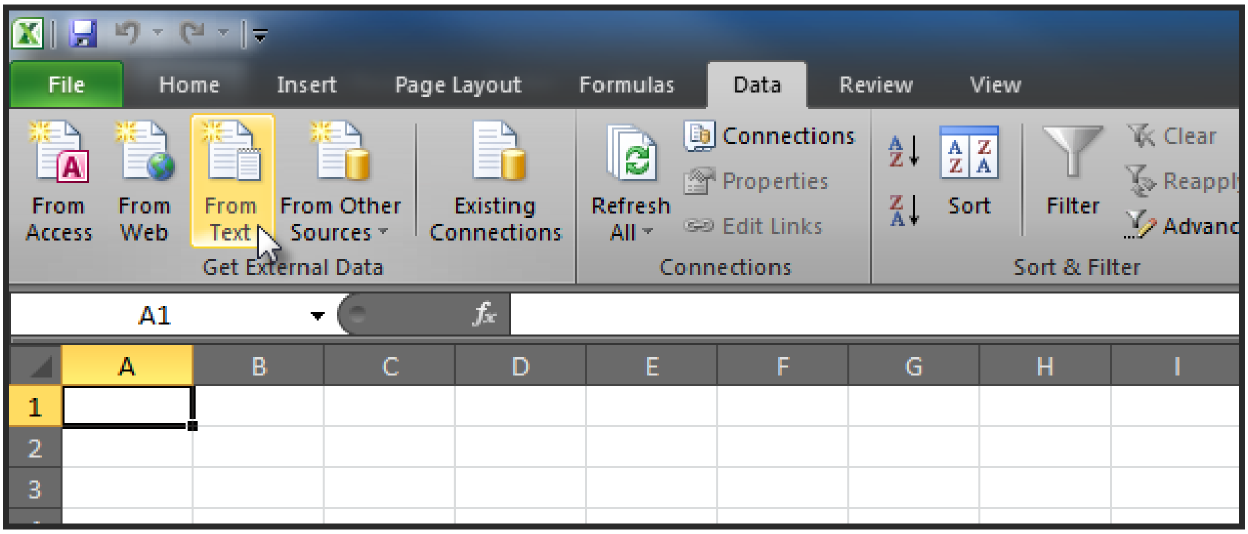
If you work with credit card data (or any other data that is stored as a long string of digits in Excel), you've probably noticed that Excel converts these long strings of digits into scientific notation. Excel will always convert a long series of digits into scientific notation when you open the source data in Excel (double-clicking the file and opening it in Excel.)

To get around the scientific notation conversion, you will need to import your CSV file into Excel and define the column of digits as "Text" so that Excel will not convert it to scientific notation.

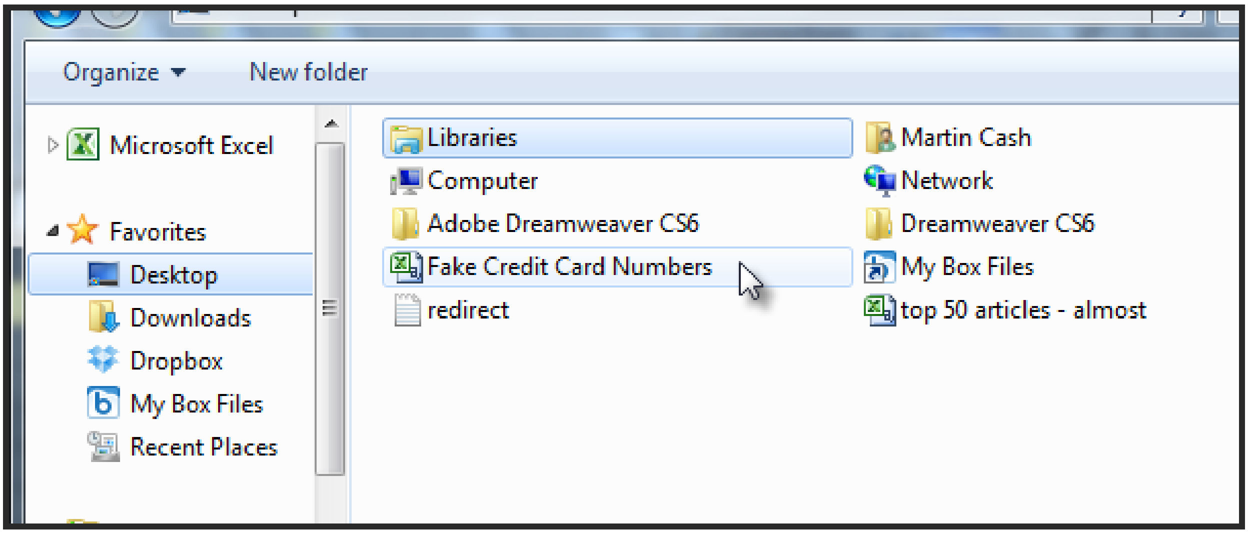
1. Open Microsoft Excel
2. Click the **Data** tab



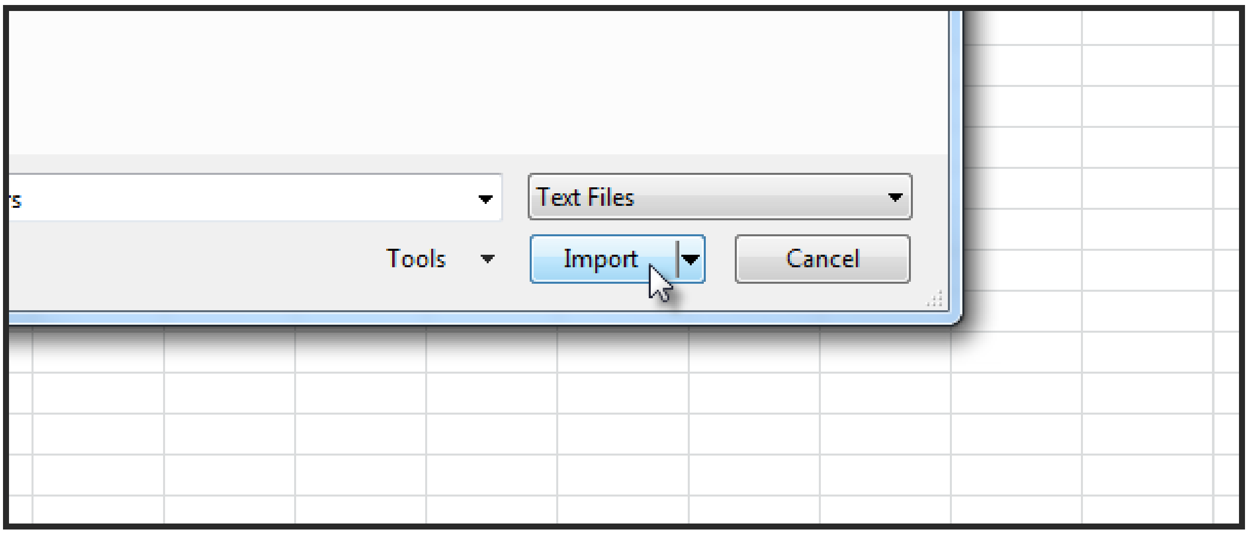
3. Click the **From Text** button



4. Locate and click on your CSV file

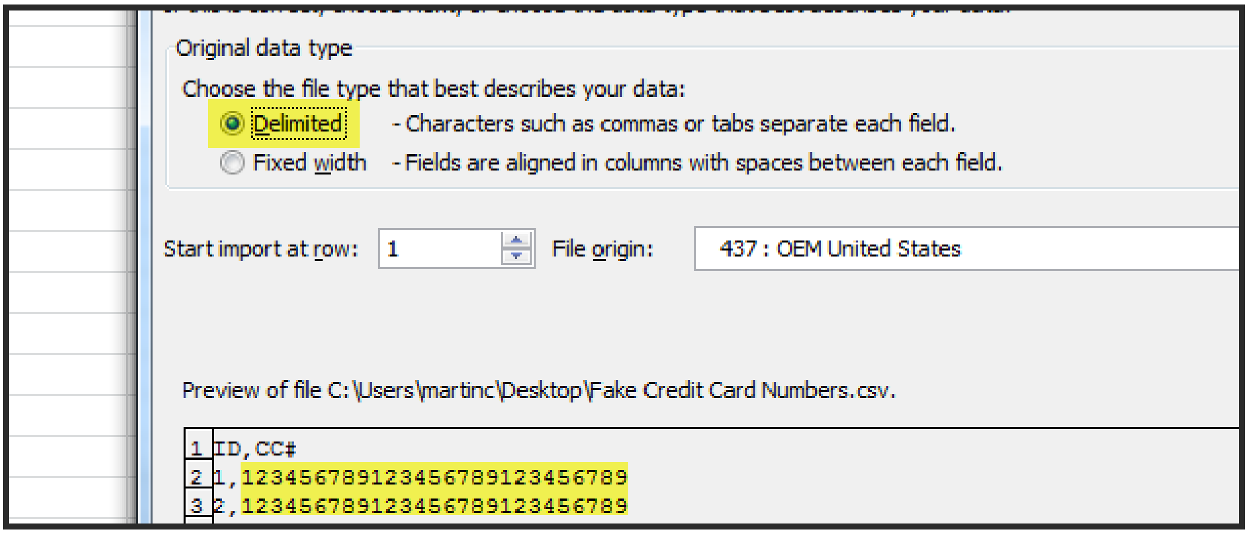


5. Click the **Import** button



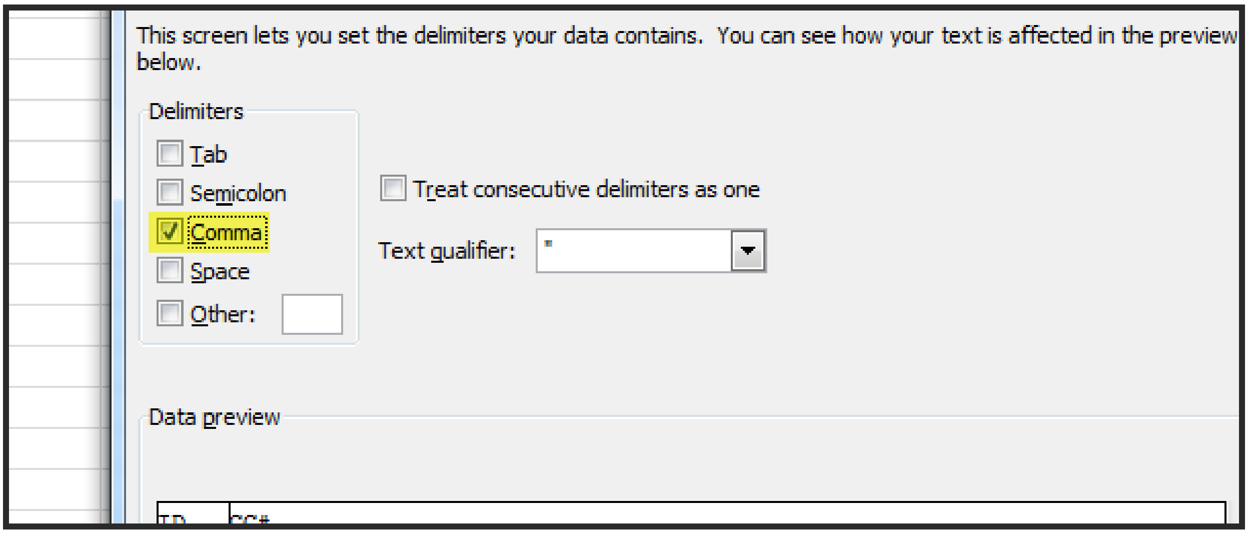
6. Make sure **Delimited** is selected and verify the file contains the credit card source data. If your source data is already scientific notation, you will have to reacquire the source

data



7. Click **Next**

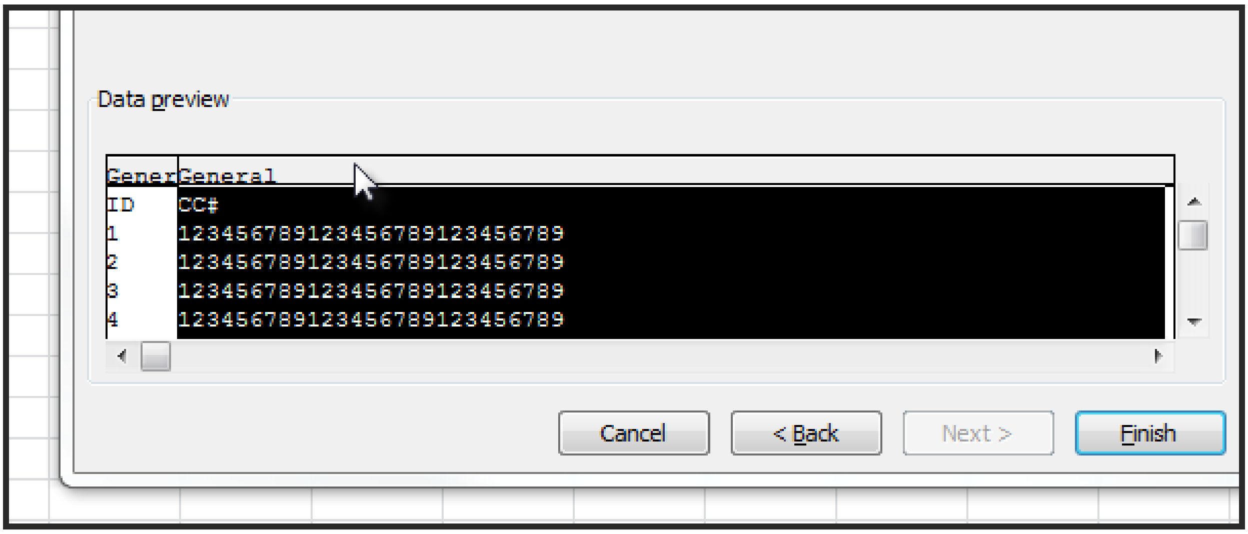
8. Make sure **Comma** is the only option selected



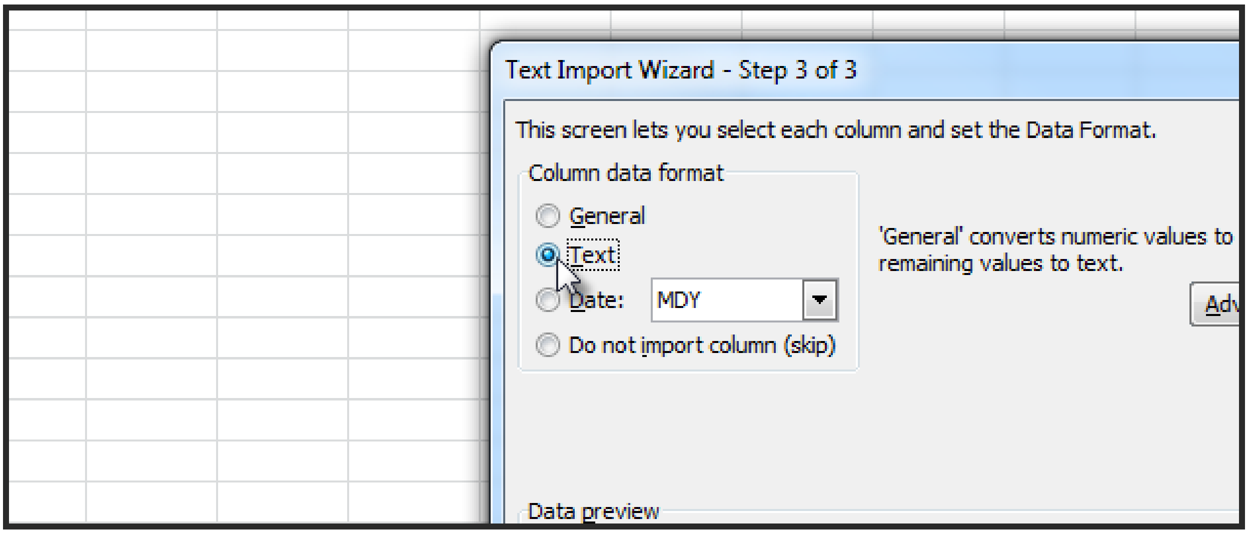
9. Take a look at the Data preview window and make sure it looks accurate

10. Click **Next**

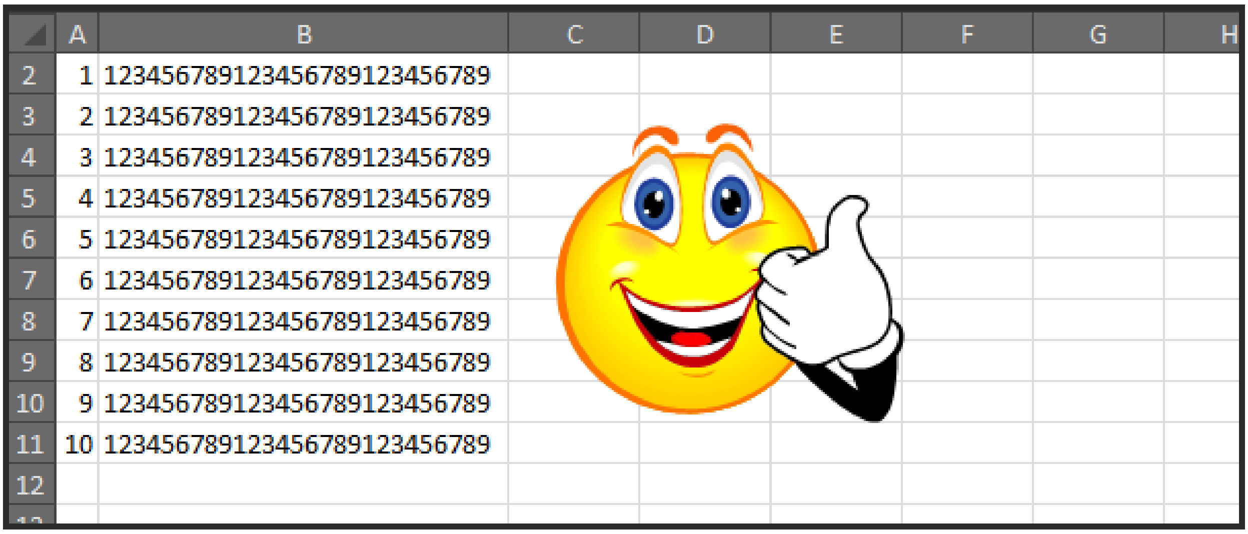
11. Select the column of data in the Data preview window that contains the credit card numbers



12. Change the data format to **Text** for that column



13. Click **Finish**, then **OK**



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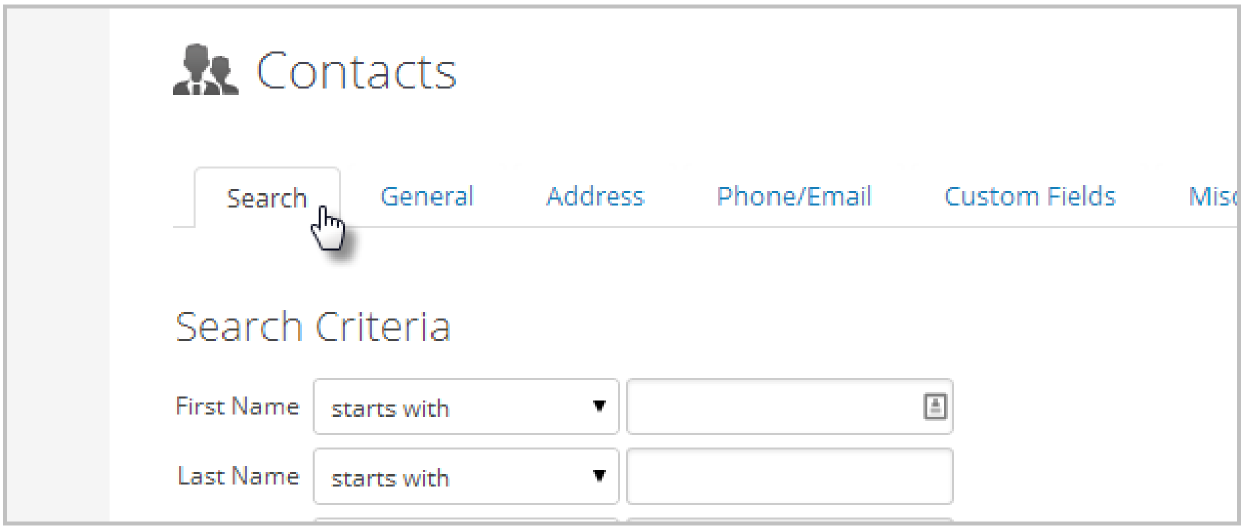
Advanced Search Techniques

Last Modified on 07/23/2018 12:58 pm MST

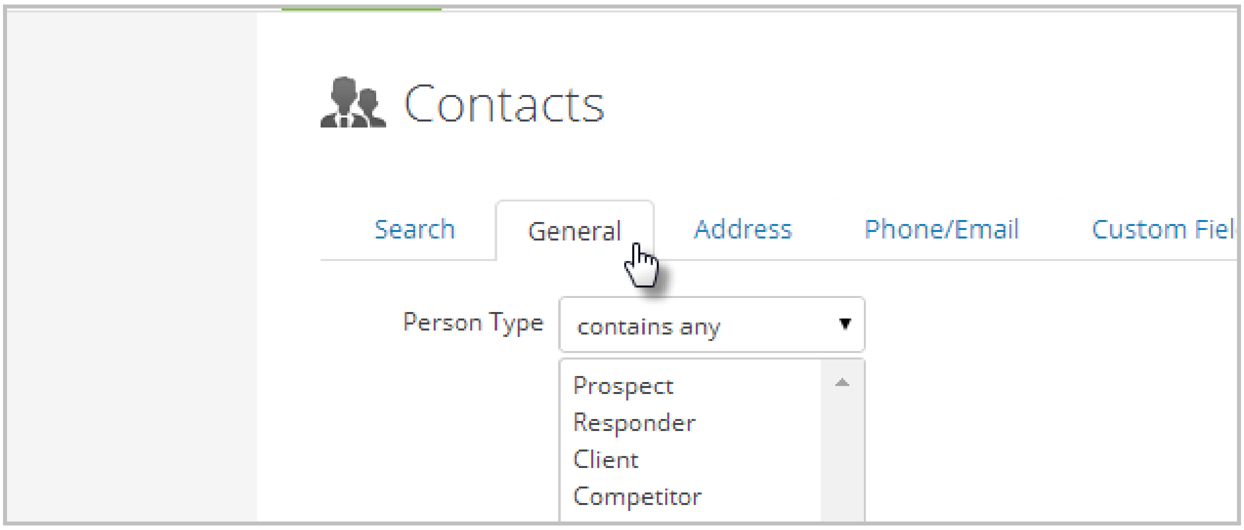
Search Tab



In this tab you can search by basic contact information. For example, you could search for everyone that has a Yahoo email address by choosing Email "ends with" @yahoo.com.

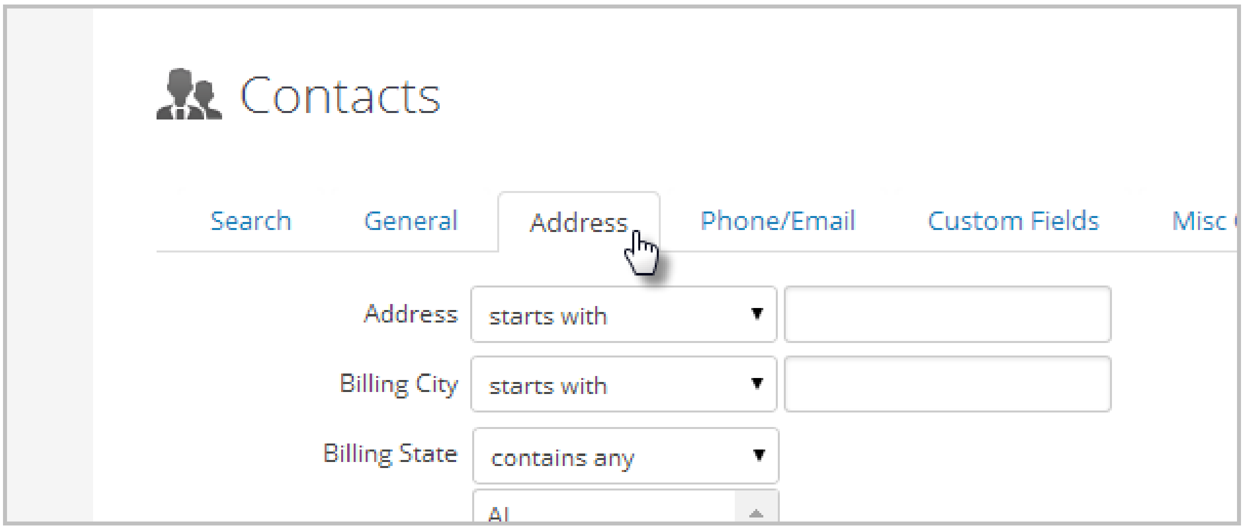
Search by tags: Select a tag or multiple tags to pull up all contacts that have the tag. The second tags box labeled, "Tags 2" allows you to craft more sophisticated searches. For example, you could pull up everyone that has a newsletter tag but does not have a customer tag. It is recommended to watch to review the article and video How to Use Tags to Segment Your List

General Tab



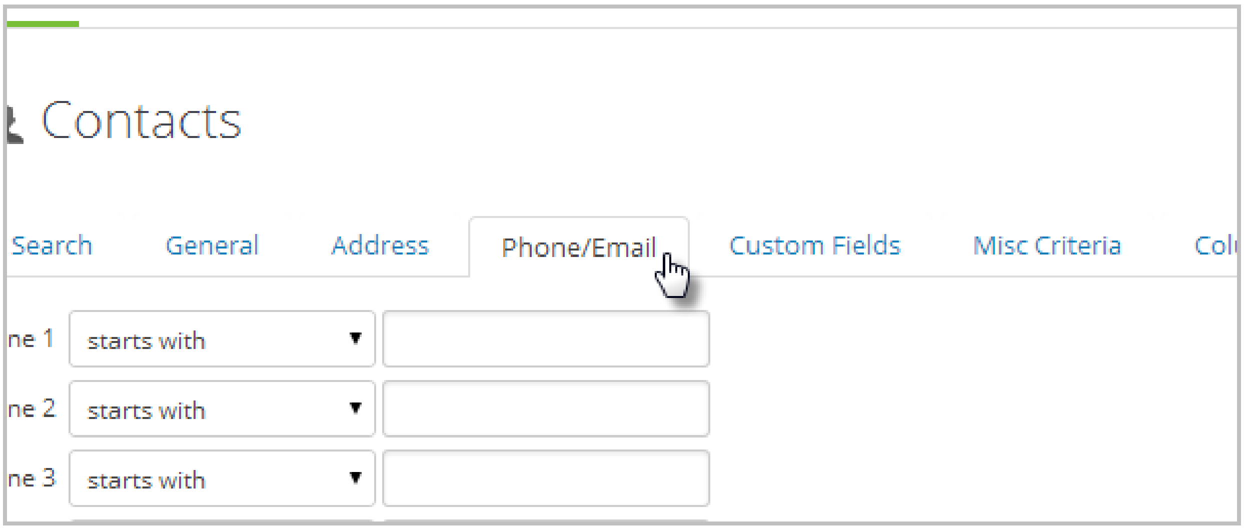
This section allows you to search on general contact information. For example, If you've collected a birthday or anniversary date, you can search for all contacts who's birthday falls within the current month and send them a card.

Address Tab



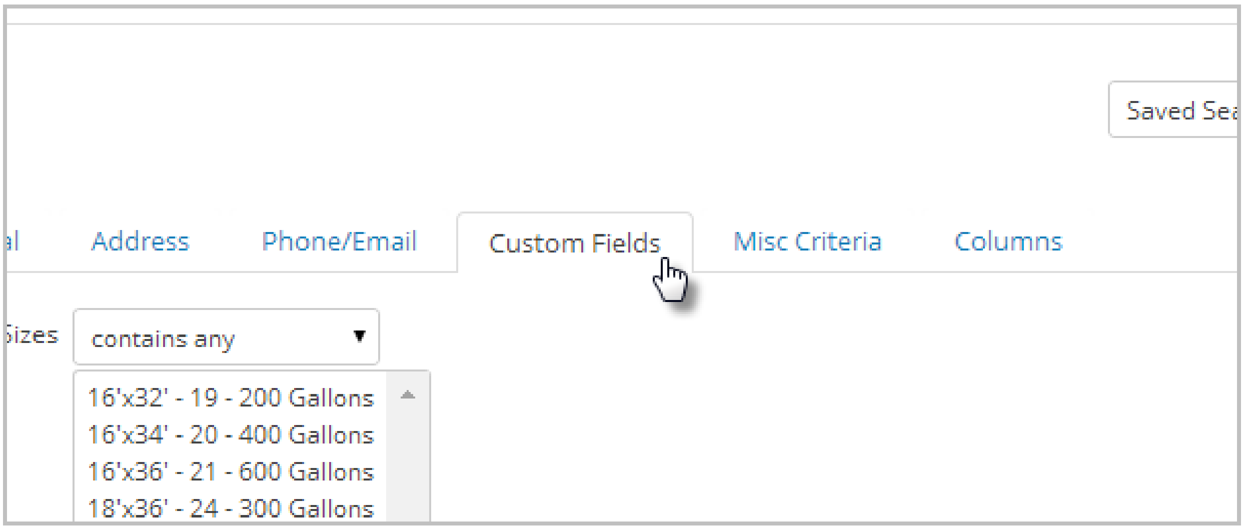
This section allows you to search on the billing, shipping and optional addresses found in the contact record. For example, you could search for all contacts that live in your state to promote a regional event.

Phone/Email Tab



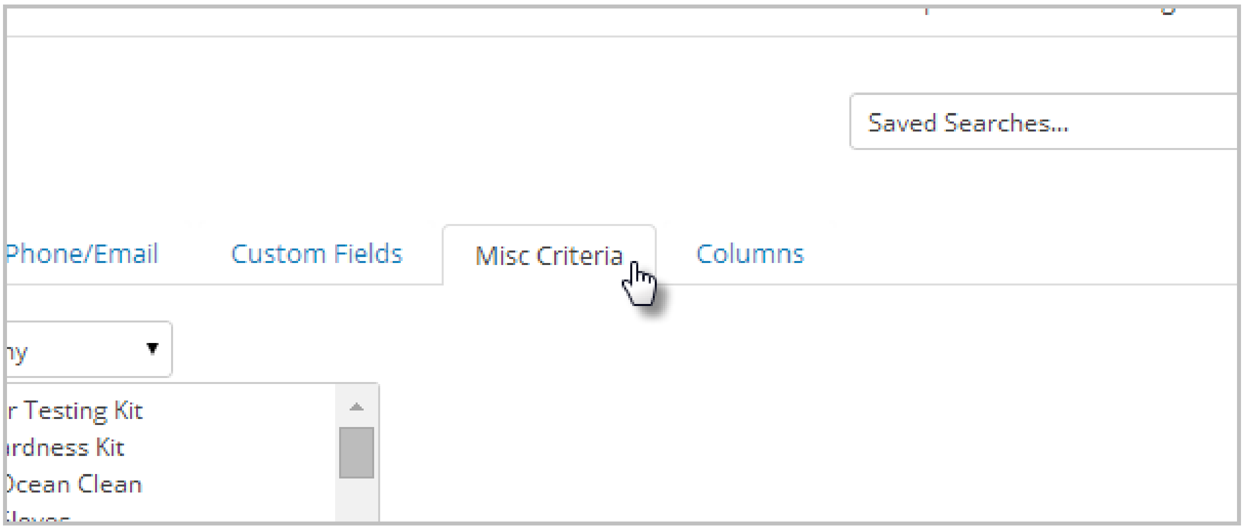
The phone options allow you to search for contacts based on an area code or entire phone number. The email options on this tab are the secondary email addresses found on the contact record. To search on the main email address, click over to the **Search** tab.

Custom Fields Tab



This tab will show you any custom fields that you have created in Infusionsoft and allow you to search on this criteria. The above example shows a simple drop-down menu that was added to denote the gender of a contact record.

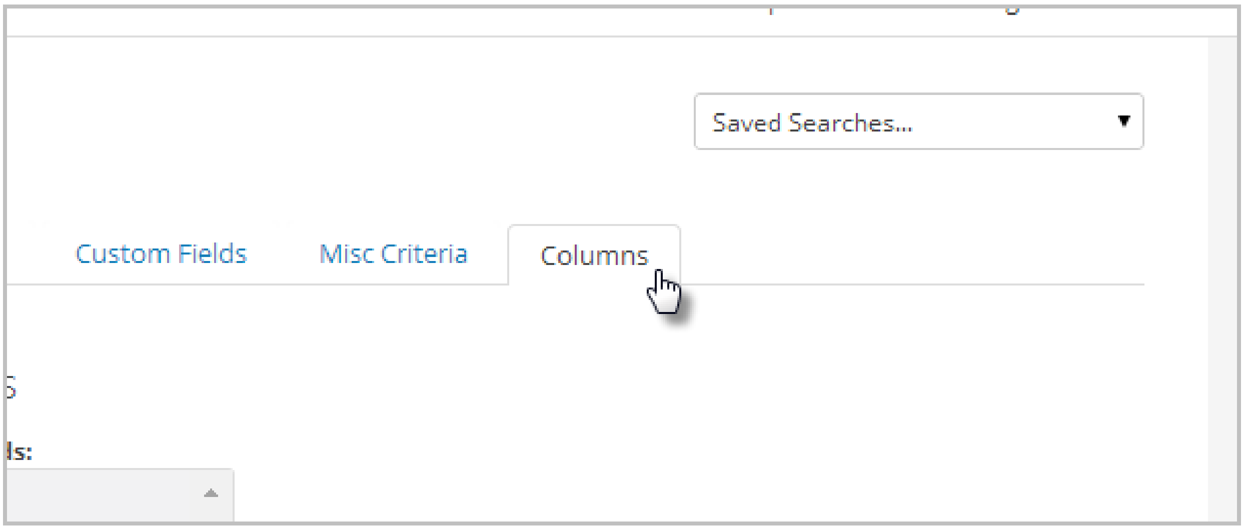
Misc Criteria Tab



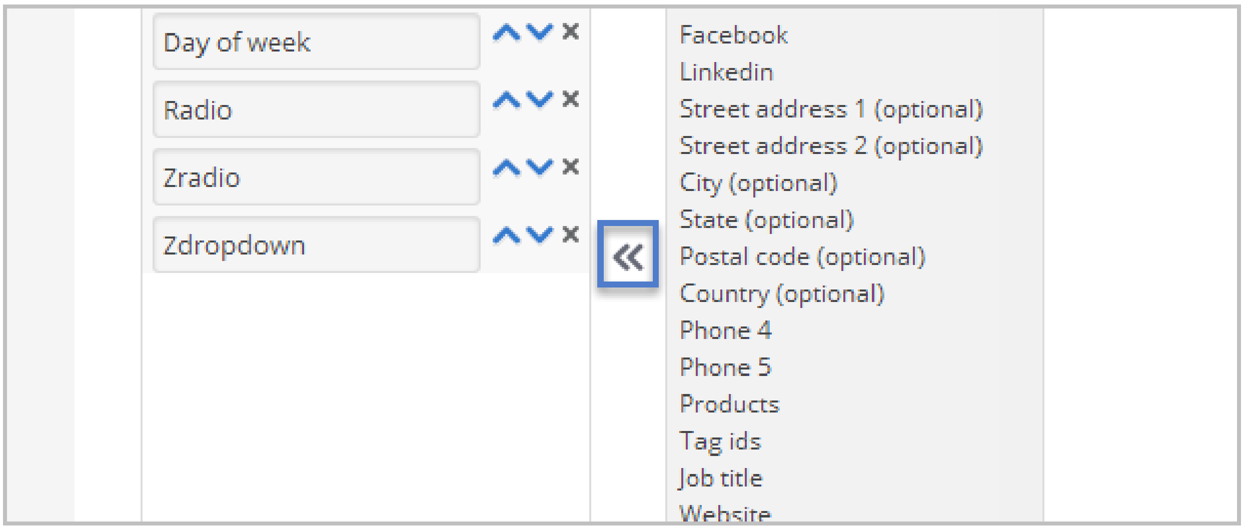
This often overlooked tab contains some very powerful search criteria such as products purchased, lead source, date created (when the contact was created in the system), and the Data Exists option.

Pro Tip! The "Data exists" option allows you to segment contacts who have values in certain contact fields. For example, you could view all contacts that have an email address. Another popular criteria is the Owner ID which is the Infusionsoft user assigned to that record.

Columns Tab



The columns tab allows you to edit the presentation of the search results. The fields on the left represent the current columns that will be displayed in your search results. To add more columns, select the column(s) on the right and click the double-arrow button to move them over to the left side of the page.


Day of week
Radio
Zradio
Zdropdown
Facebook
Linkedin
Street address 1 (optional)
Street address 2 (optional)
City (optional)
State (optional)
Postal code (optional)
Country (optional)
Phone 4
Phone 5
Products
Tag ids
Job title
Website

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Use Tags to Create Contact Lists

Last Modified on 07/23/2018 12:59 pm MST

Tags are marketing labels that are applied to contact records. Tags are one of the most powerful segmentation tools in Infusionsoft. Tags segment your contacts into very specific lists so that you can send more targeted marketing messages to those contacts.

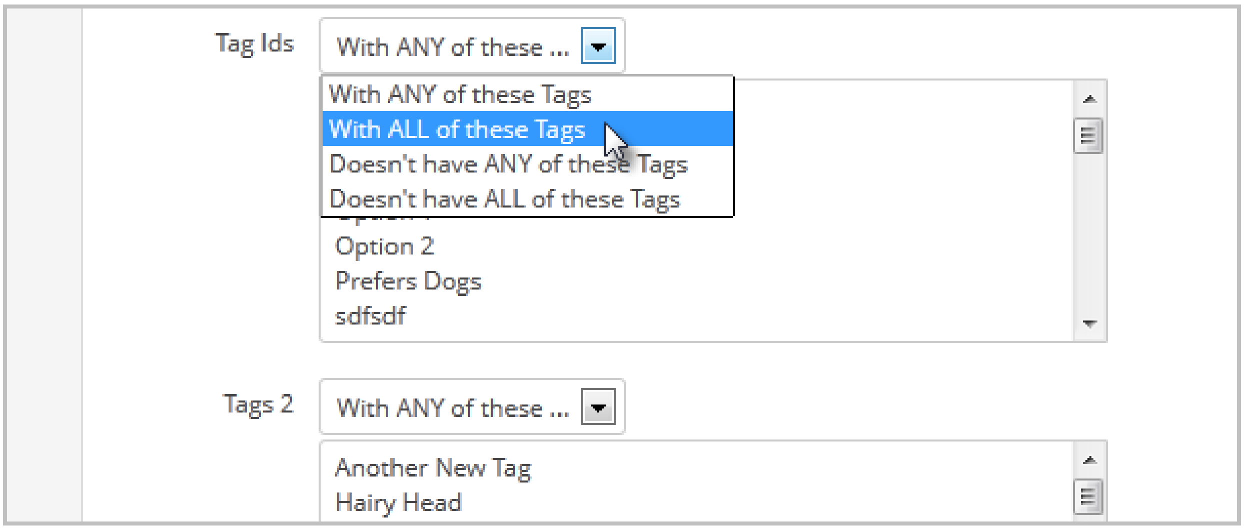
You can apply tags to contact records manually . Most of the time, tags will be applied or removed with campaign automation. You can keep your tags organized and make them easier to manage by assigning them to tag categories.

You can create new tags through **CRM** > **Settings** > **Tags** or you can create them "on the fly" when you are on a contact record or creating an automated campaign sequence or sending a broadcast . Tag names can correspond to information requested, events attended, membership programs, relationship status, and more. They should be descriptive because they track prospect and customer engagement history and serve as powerful search criteria.

TAG CATEGORY	TAG NAME
Prospect	10 Tips to Facebook Success eBook

TAG CATEGORY	TAG NAME
Prospect	Facebook for Business Webinar
Prospect	Online Business Reputation Workshop
Customer	B2B Online Marketing Coaching Program

When searching for specific contacts, tags give you powerful segmentation options. You can set very specific search criteria **CRM > Contacts** for tags using the following parameters:



- *With ANY of these Tags*: This is an "or" statement. You will use this if you want a list of people who have at least one of the tags you've selected as search criteria.
- *With ALL of these Tags*: This is an "and" statement. You will use this if you want a list of people who have ALL of the tags you've selected as search criteria.
- *Doesn't have ANY of these Tags*: This is an "or" statement. You will use this if you want a list of people who do not have even one of the tags you've selected as search criteria.
- *Doesn't have ALL of these Tags*: This is an "and" statement. You will use this if you want a list of people who do not have ALL of the tags you've selected as search criteria.

Sometimes you may need a combination of logic shown above. For these situations, you will notice that there are two tag search fields in Infusionsoft. Using the table above, here is how one might find the right contacts to send a special offer for the B2B Online Marketing Coaching Program.

To find the list of people that are interested, but who are not customers you might use the following tags search criteria:

With any of these tags

- Prospect - 10 Tips to Facebook Success eBook
- Prospect - Online Business Reputation Workshop

AND

Doesn't have any of these tags

- Customer - B2B Online Marketing Coaching Program

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Tag Categories

Last Modified on 07/23/2018 12:59 pm MST

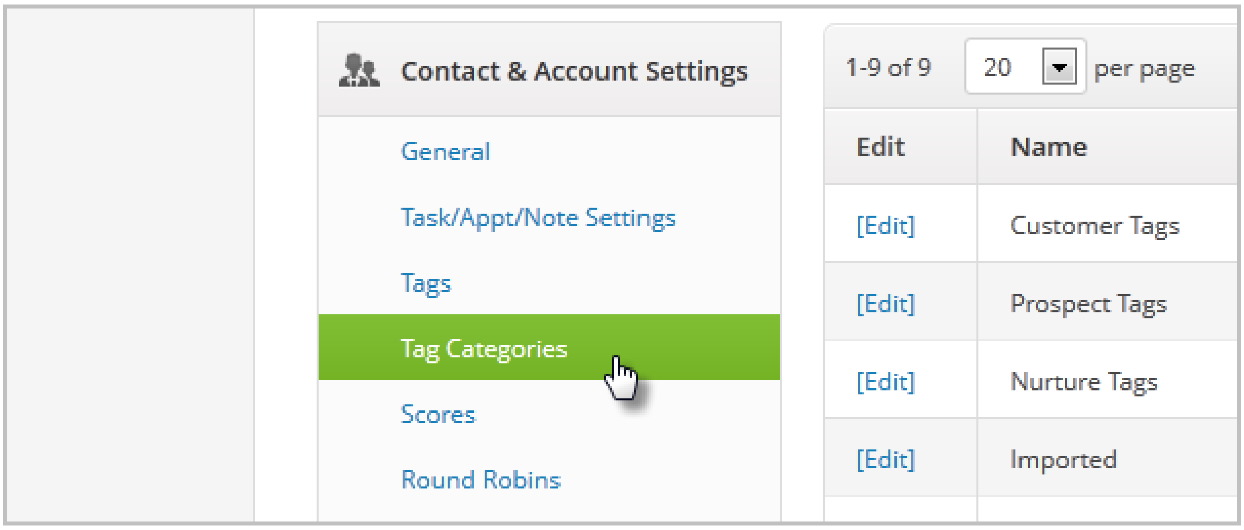
Use tag categories to organize your tags.

Example tag category names:

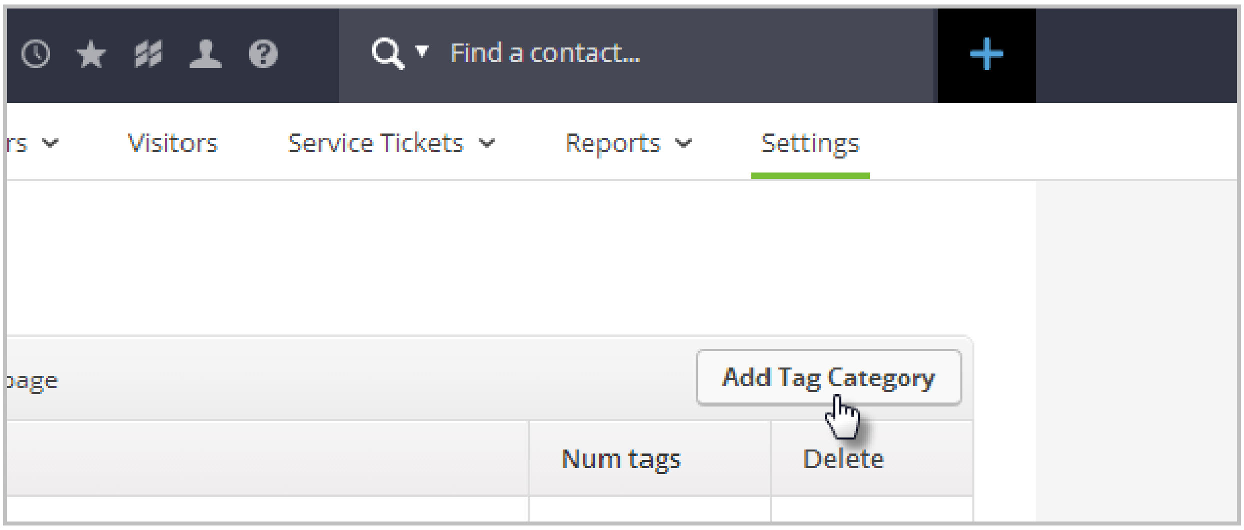
- Customers
- Prospects
- Members
- Events

1. Go to **CRM** > **Settings**

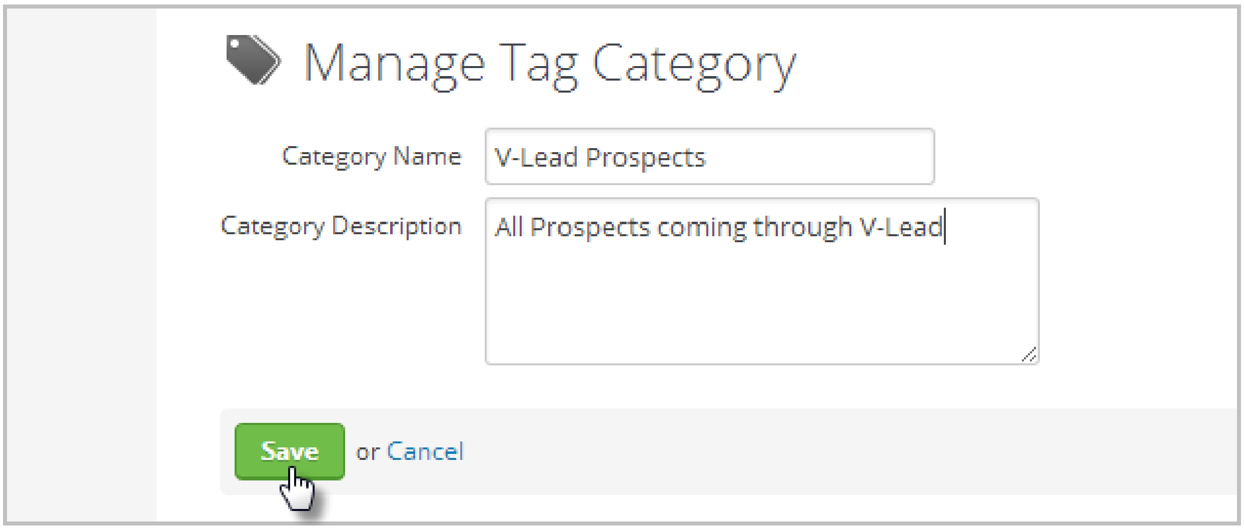
2. Click on **Tag Categories** in the settings menu



3. Click on the **Add Tag Category** button. Note: You can also create a new tag category "on the fly" when adding a new tag.



4. Enter the category name and description and click on the **Save** button

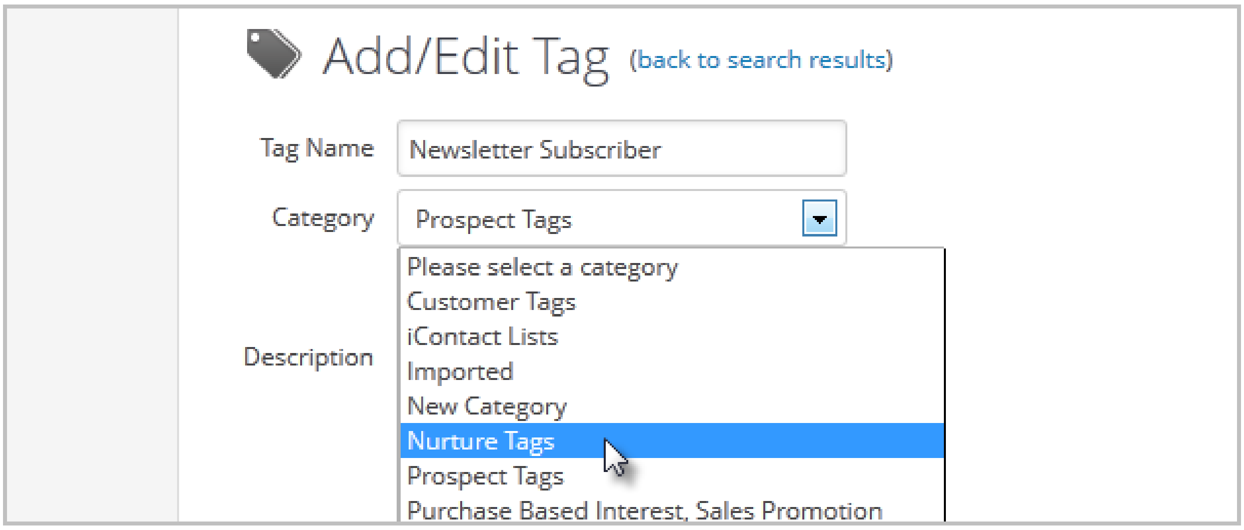


5. (Optional) Click on **Delete** to remove the tag category permanently.

CustomerHub	2	[Delete]
Behavior	2	[Delete]
NPS	3	[Delete]
Purchase Based Interest, Sales Promotion	1	[Delete]
19th Green	2	[Delete]
V-Lead Prospects	0	[Delete]

Be Careful! When you delete a tag category, it is permanent. The tags assigned to it will be reassigned to the "Unnamed Category." You may want to update existing tags before you delete a tag category.

6. To assign a tag to a different tag category, find the tag and change the **Tag Category** drop-down.



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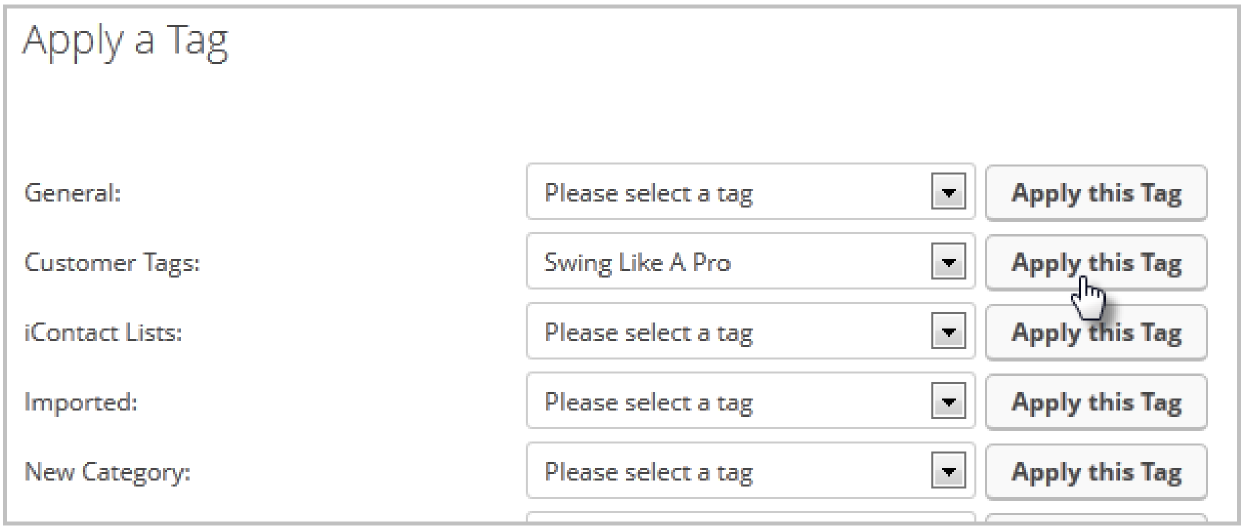
Apply Or Remove Tags From A Contact Record

Last Modified on 07/23/2018 12:59 pm MST

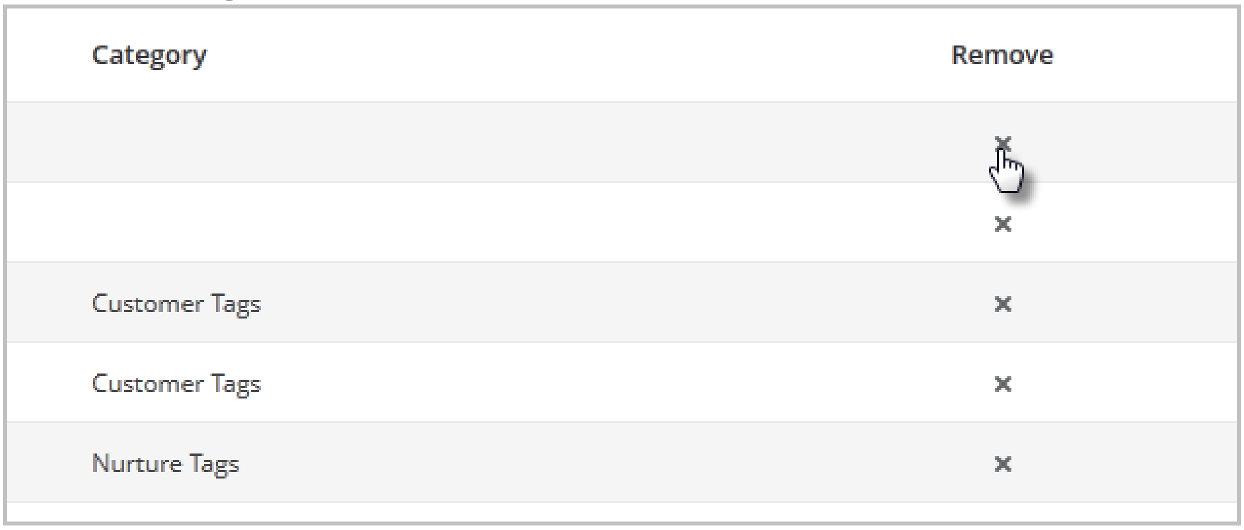
1. While viewing a contact record, click the **Tag** tab

2. To apply an existing tag, select a tag from a drop-down and click on the **Apply this Tag** button.



3. If you don't see the tag you need, click on the **Create a new Tag** button (if your user permissions allow.)

4. To remove a tag, click on the "x".



5. Click the **Save** button to apply your changes.

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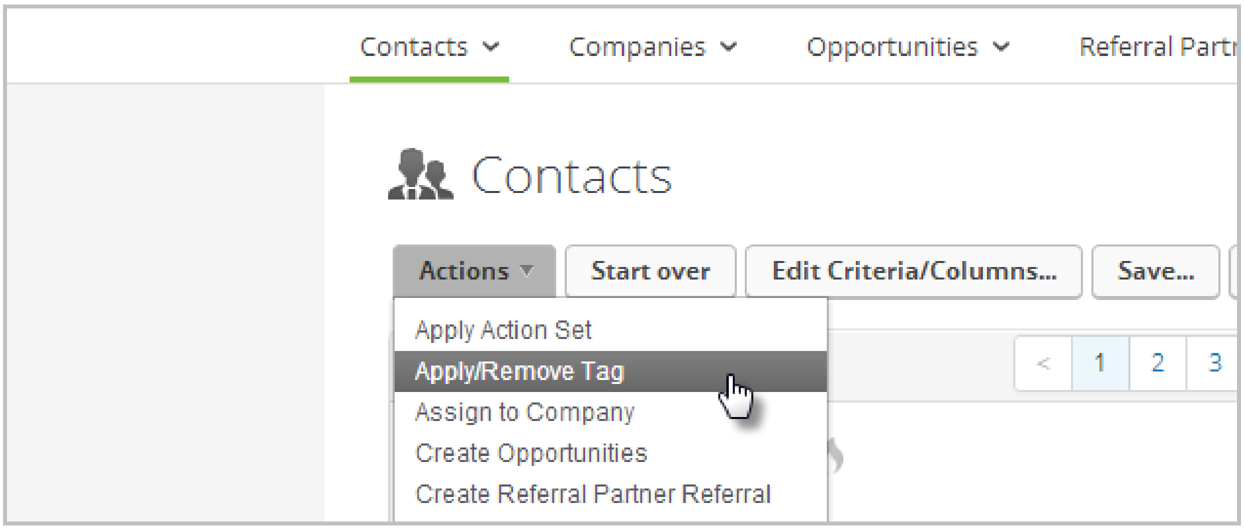
Apply Or Remove Tags to a List of Contacts

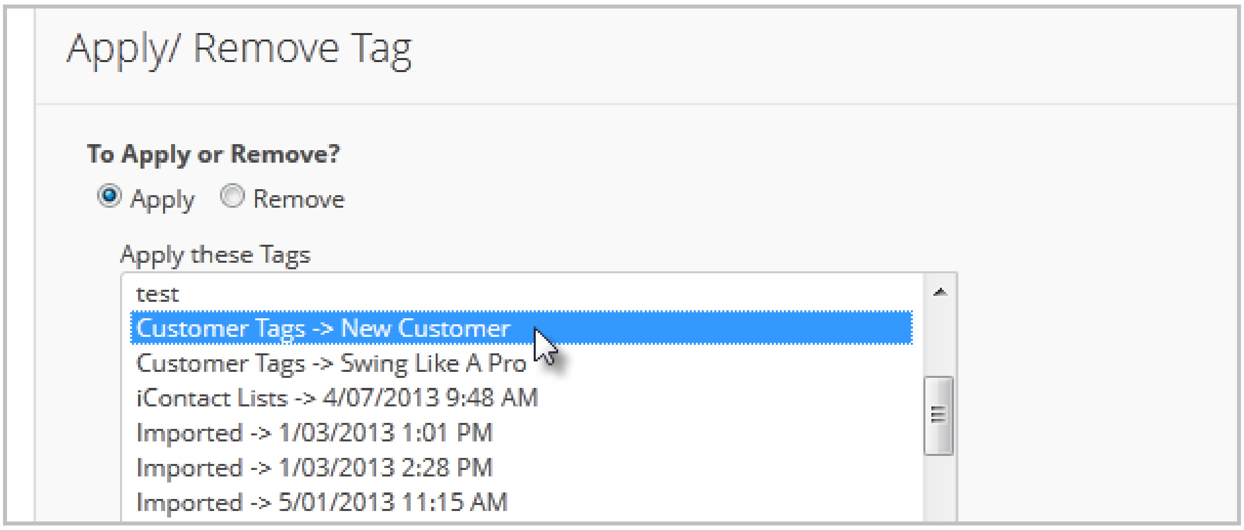
Last Modified on 07/23/2018 1:00 pm MST

1. Go to **CRM** > **Contacts** and select a saved search from the drop-down or enter new search criteria and click on the **Search** button.

2. Once you have accurate search results, Click on the **Actions** button and select the **Apply/Remove Tag** option from the drop-down.

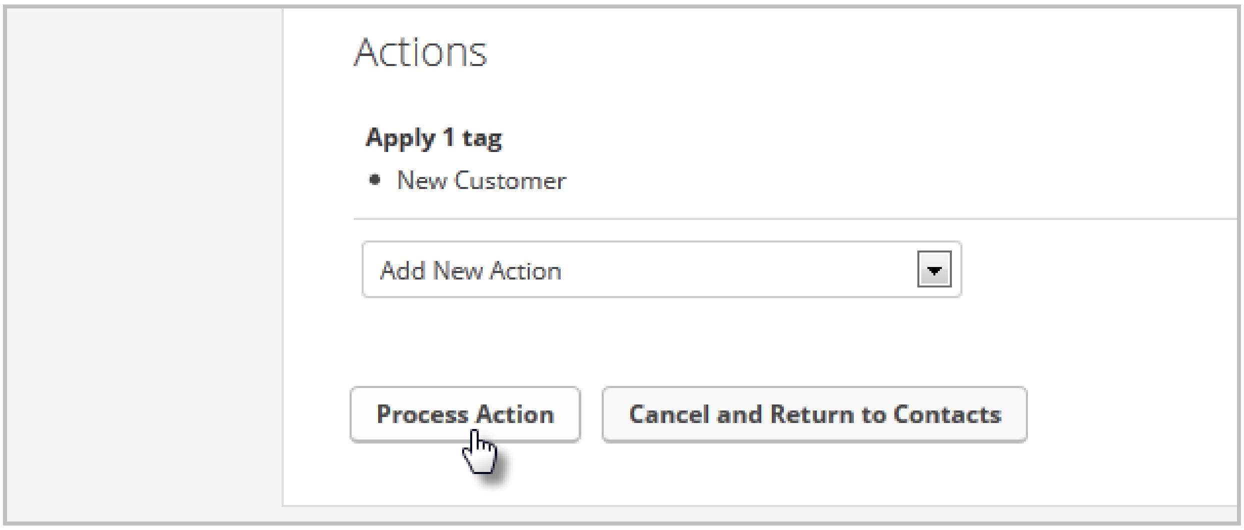


3. Choose the tags using one or more of the following options:



- Click on the name of a tag to select it. Hold down the **Ctrl** key (or **Command** key on a Mac) on your keyboard to select more than one.
- Click on an **All Tags** option to apply or remove all of the tags within a tag category. This option will work with all of the current tags in that category, and all of the tags you add to the category in the future.
- If you don't see the tag you need listed, then click on the Create a new Tag link to add one. Enter a tag name and select an existing category from the drop-down (or enter a new category in the "other" field provided) and click on the Create this Tag button. **Warning!** When you create a new tag, it will clear any tags you previously selected. You will need to select them again.

4. Click the **Save** button to save the tag, and then click on the **Process Action** button.



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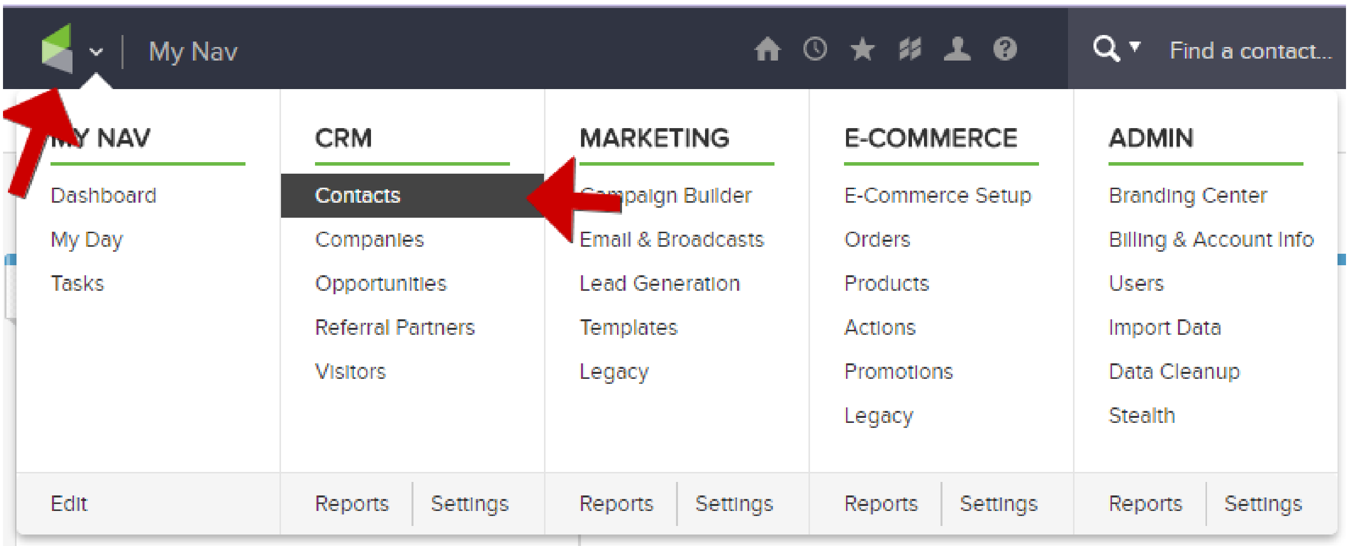
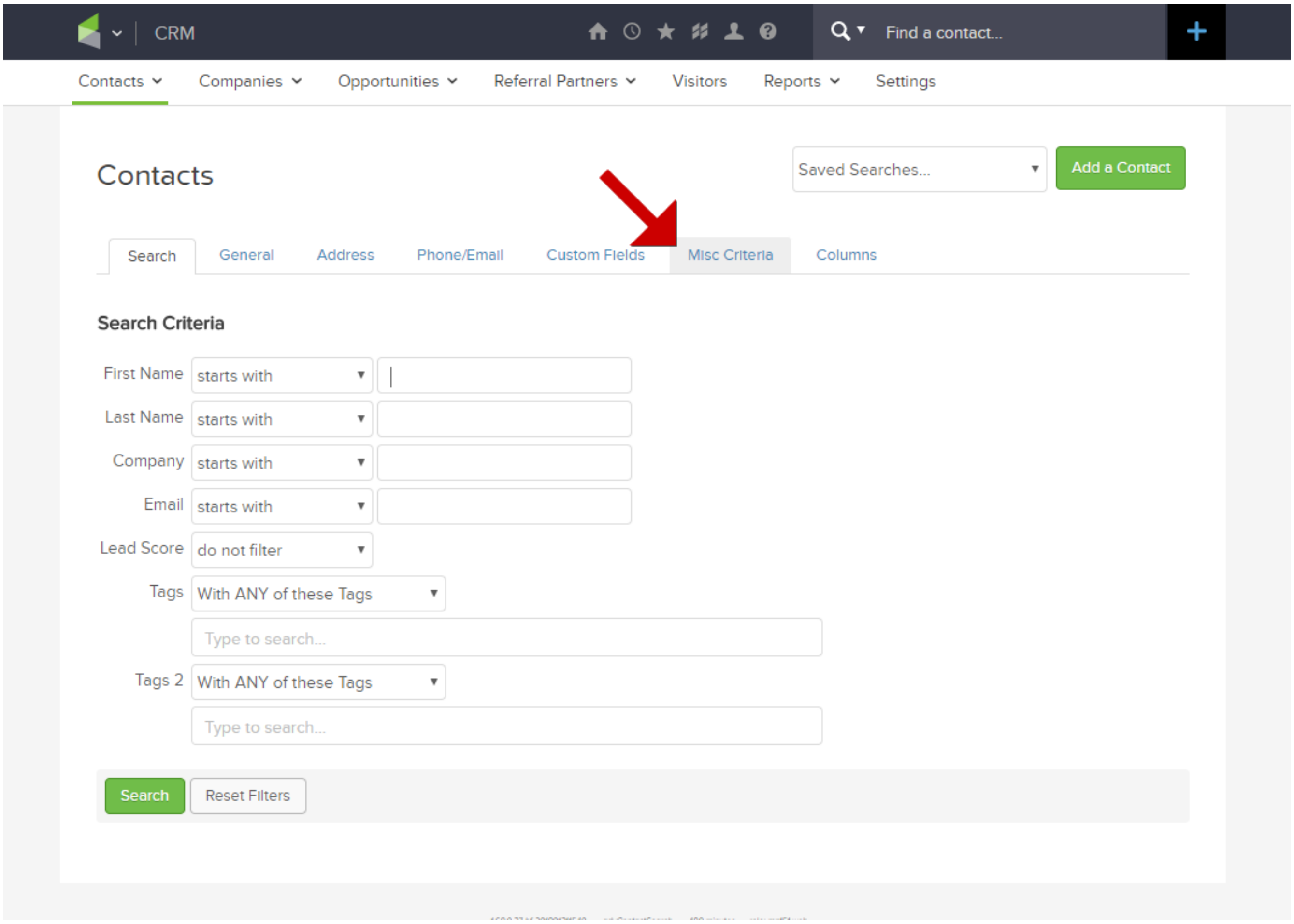
How to search by the Date Created

Last Modified on 07/23/2018 1:00 pm MST

1. Go to **CRM** > **Contacts**

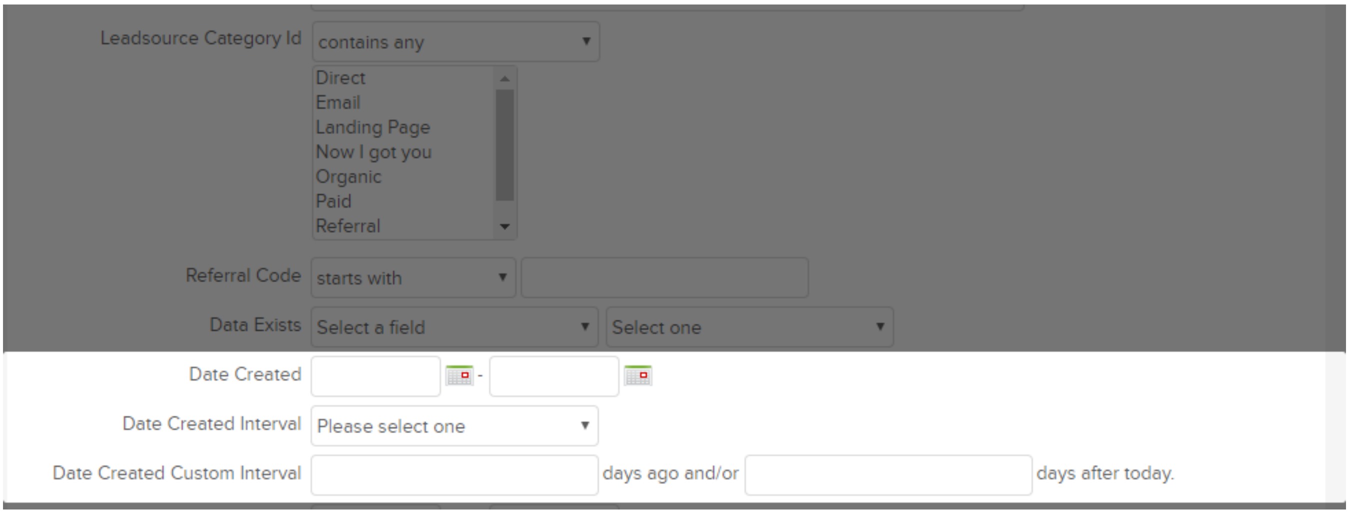


2. Click the **Misc Criteria** tab



Pro-Tip: Date created is available through multiple reports. It's always listed under the Misc Criteria tab

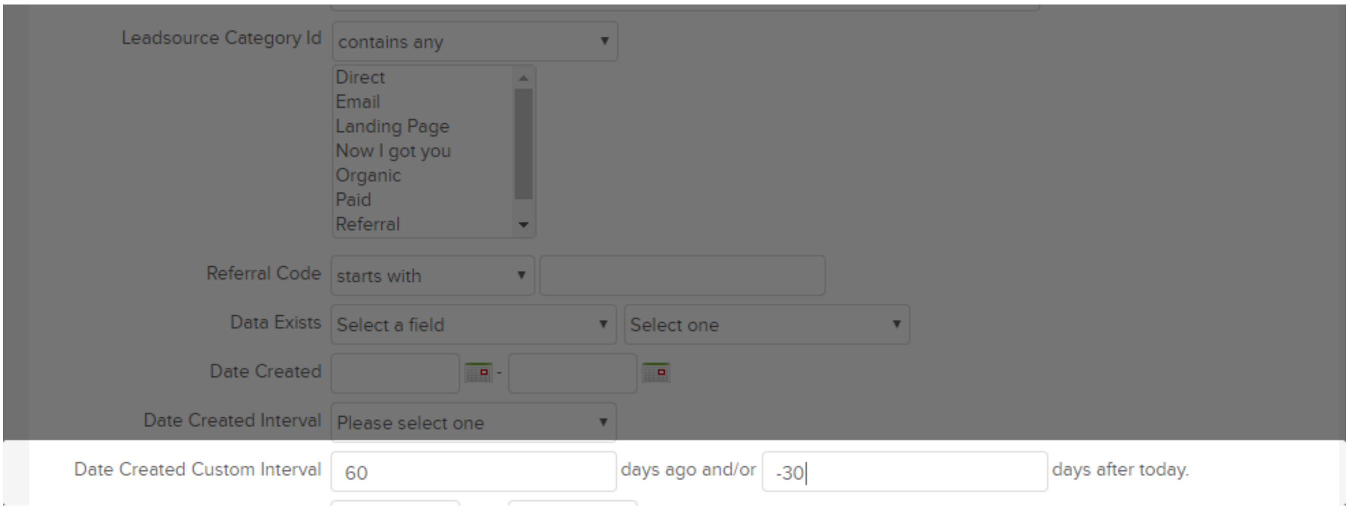
3. Scroll down to **Date Created**



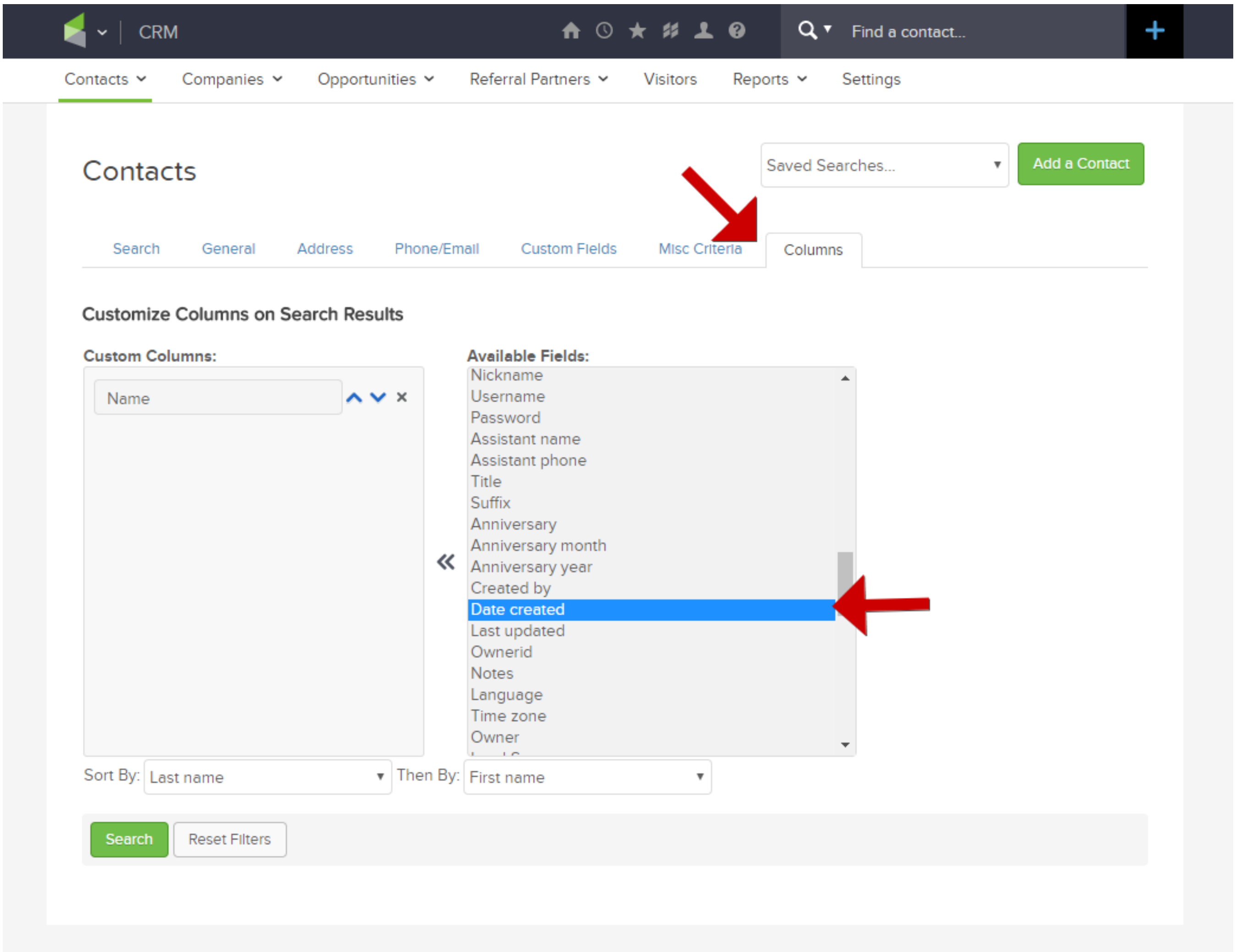
4. Search by the contact's date created by selecting a specific date range, date Interval, or custom interval

5. You can say 60 days ago and/or 30 days after today; which will show you Contacts

Created between 60 and 30 days ago



6. Click on the **Columns** tab to add **Date Created** to the Search Results



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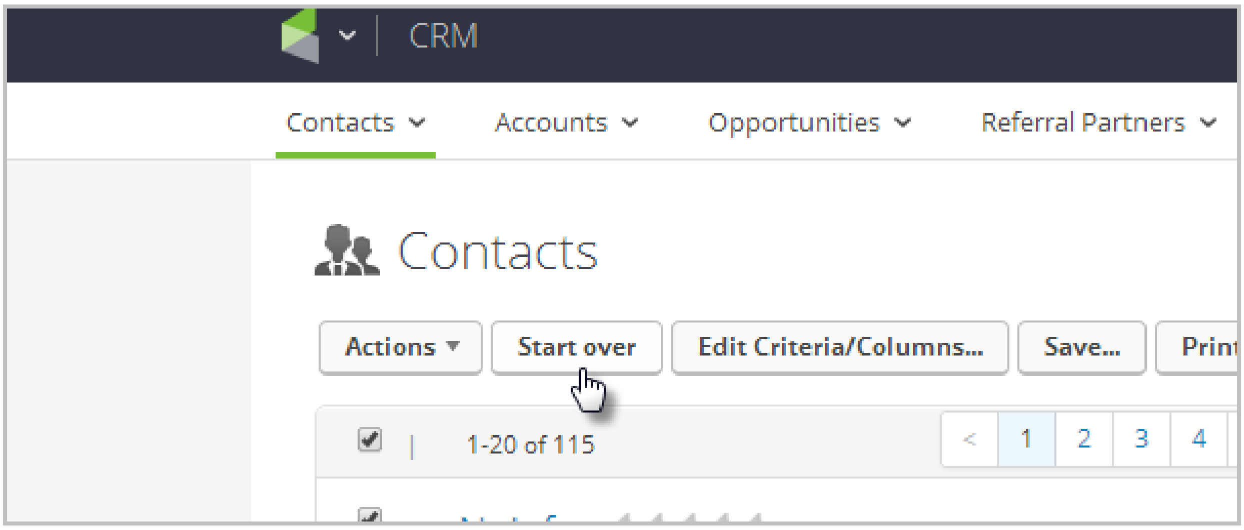
Saved Search

Last Modified on 09/07/2018 12:43 pm MST

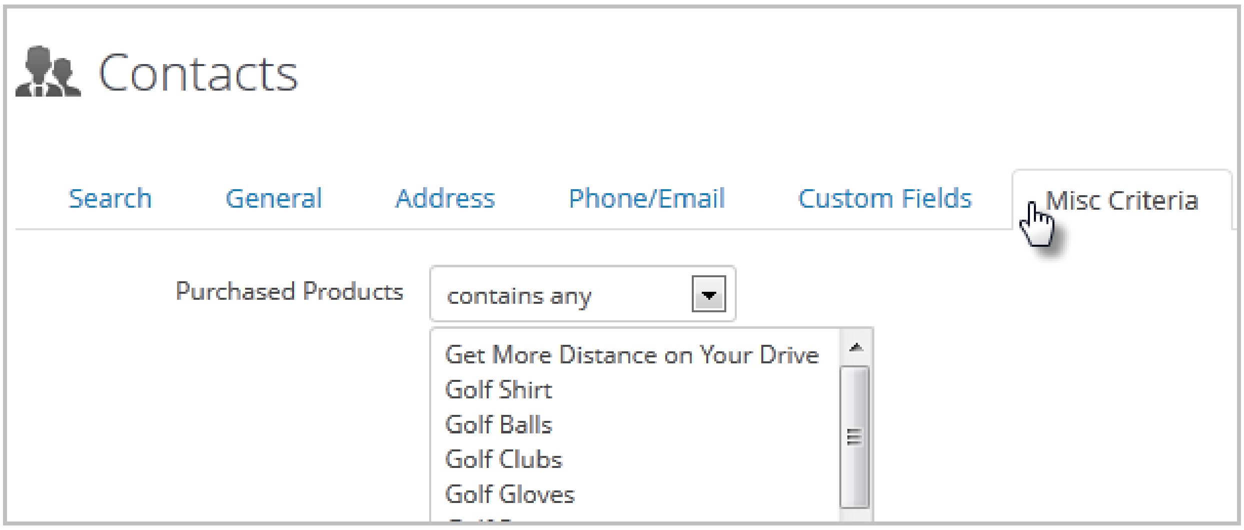
When you create a saved search, you save a set of criteria that determine which contacts show up in search results. The contacts listed in the results will change automatically as the people in your database respond to your marketing messages, make purchases, move through your sales pipeline, etc... Saved searches are dynamic lists and reports that can be referenced quickly. You can also print and export the lists (if your permissions allow) or manually apply actions to them.

The following example is based on a contact search, but you are able to create a saved search from any record-type (Contacts, Companies, Referral Partners, Opportunities, Orders) in Infusionsoft.

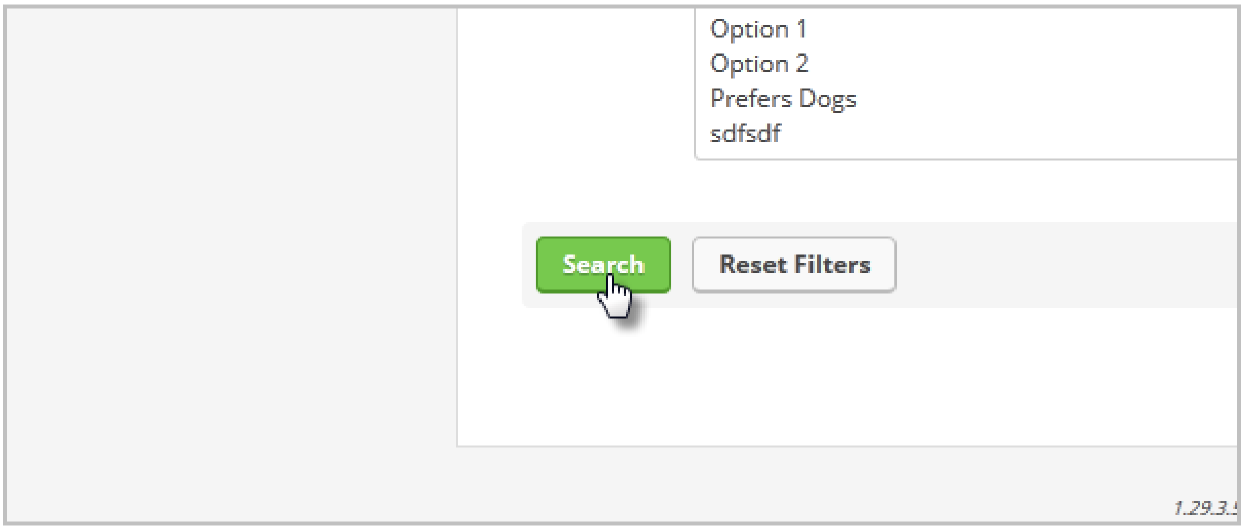
1. Go to **CRM > Contacts**
2. Click the **Start Over** button to clear any previous search results



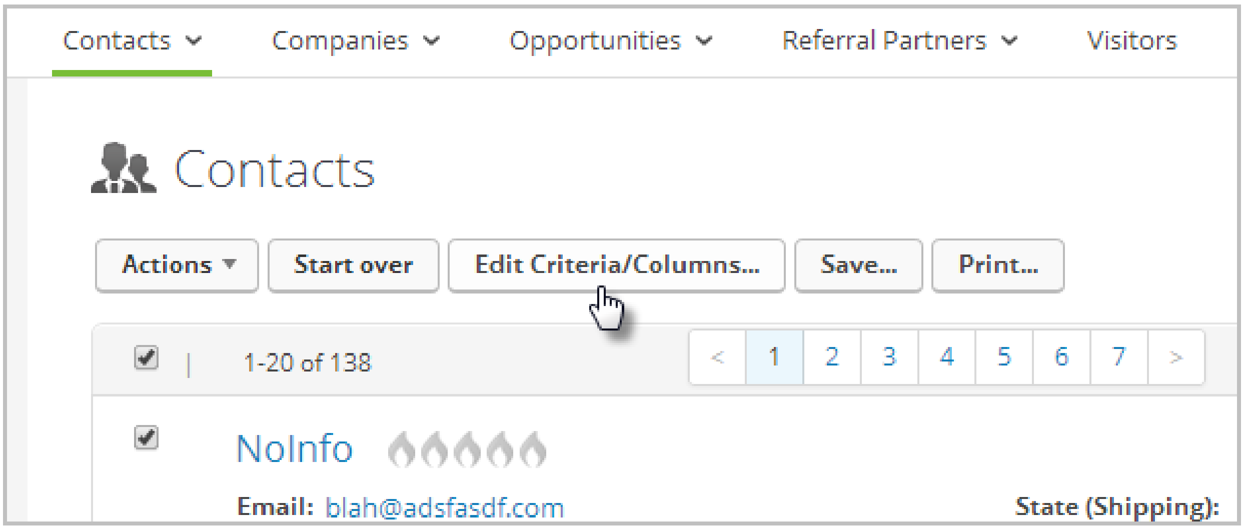
3. Navigate the tabs to find the search criteria you are looking for



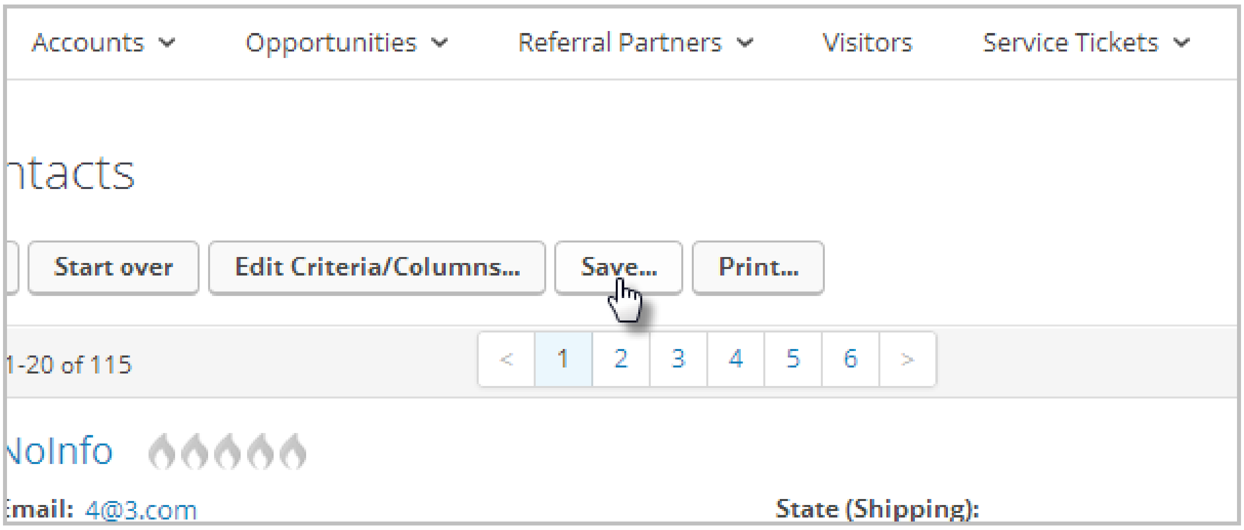
4. Click the **Search** button



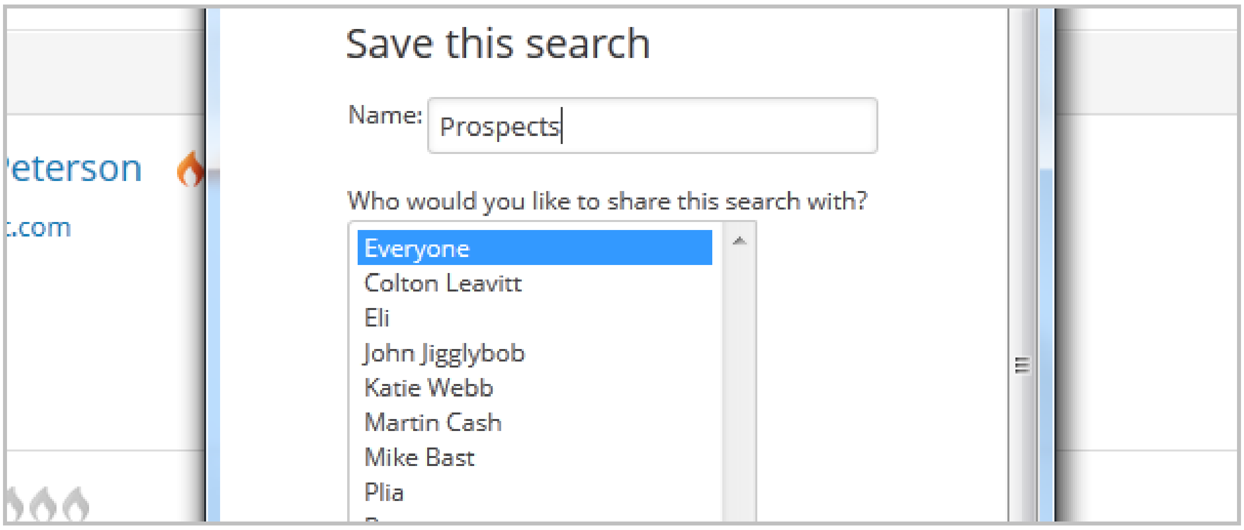
5. (Optional) If you need to further refine your search, click the **Edit Criteria/Columns...** button



6. (Optional) Click on **Save** button to name and save the dynamic list on your dashboard for quick access in the future
   The contacts in the list will update automatically. Remember, you are saving the criteria, not a specific list of people.

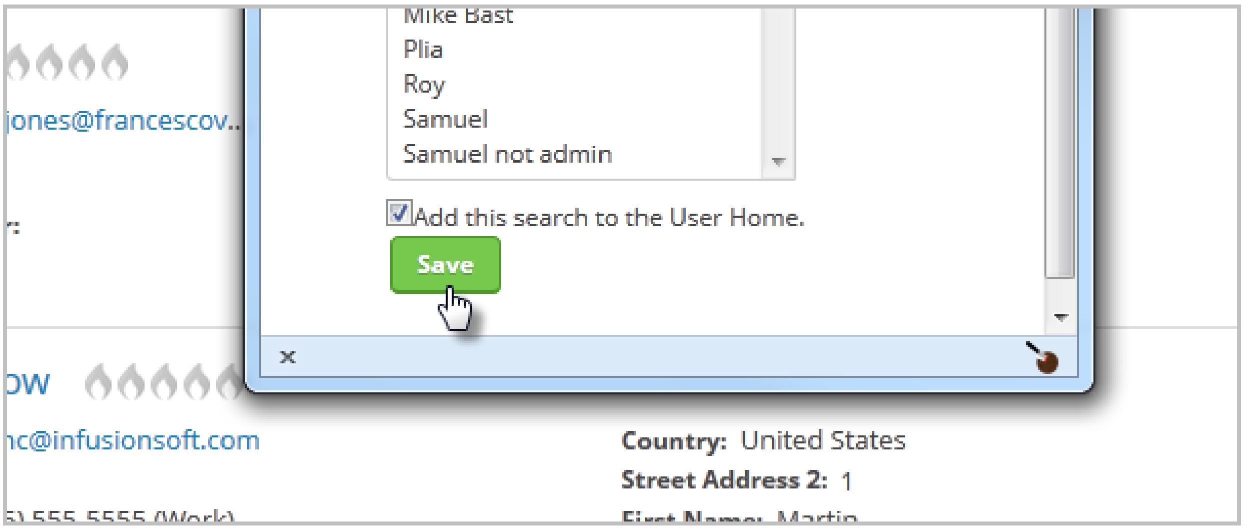


7. Name your saved search, choose who can have access to it, and (optionally) add it to your dashboard

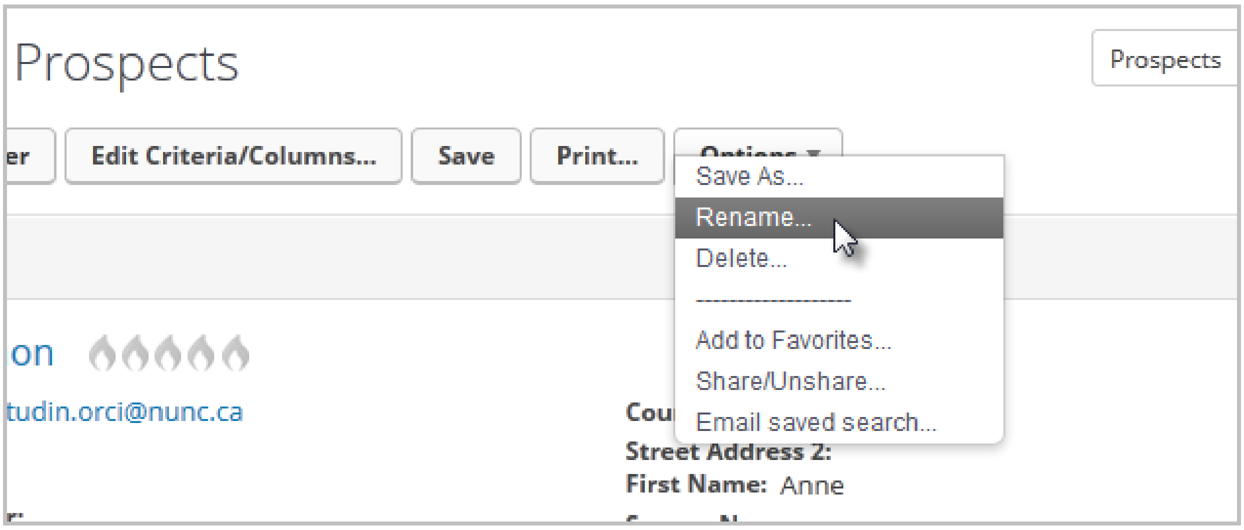


- **Name:** Enter a short, descriptive name for the search. This name will display in custom drop-down menus and on the Dashboard
- **Share with Users:** Click on the name(s) of users who need to see this search. Select *Everyone* to share the search with all users. Note: Hold down the CTRL key on your keyboard to select more than one user from the list.
- Mark the checkbox if you want to add a saved search widget to your home page Dashboard. The saved search widget will display the first 20 people in the list and a link to view the entire list of people.

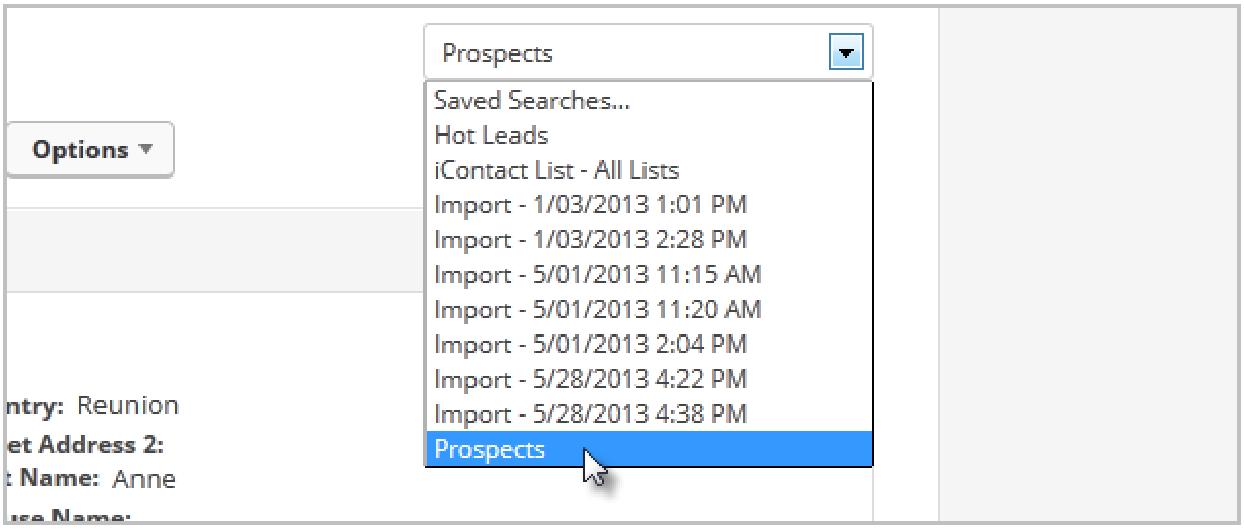
8. Click the **Save** button



9. Once you save a search, click the **Options** button to modify it, add it to your user home, share it, or create an automated email report



10. The saved search is now available as an item in the saved search drop-down and can also be accessed on your Dashboard



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Mass Update A List Of Contacts

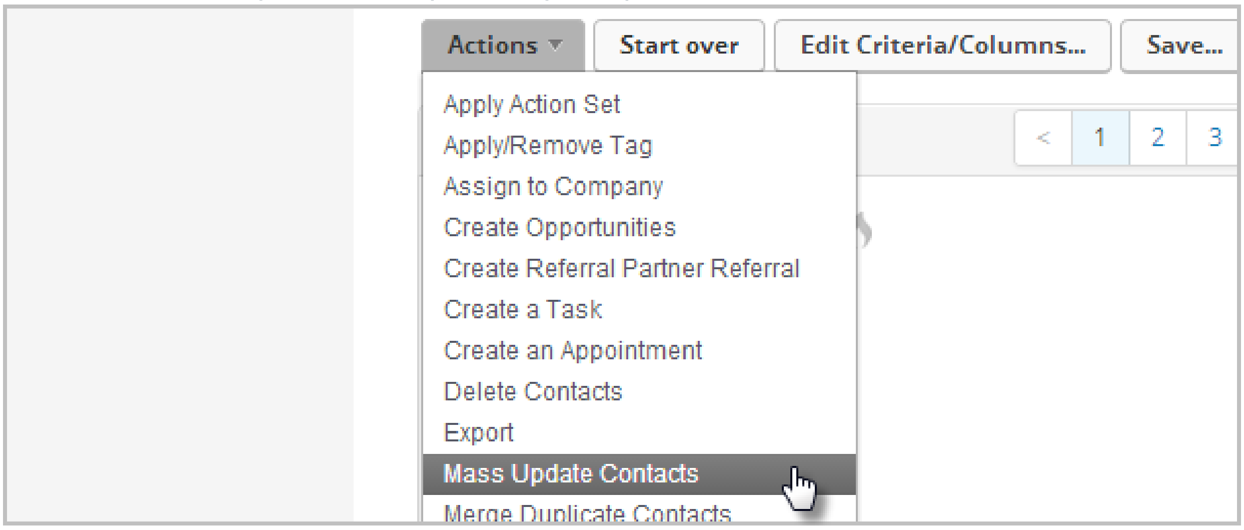
Last Modified on 07/23/2018 1:01 pm MST

Infusionsoft allows you to mass update a field for a list of contacts. This works well when you need to add a common field to each contact on the list (e.g. each contact needs to have the same country or lead source id.)

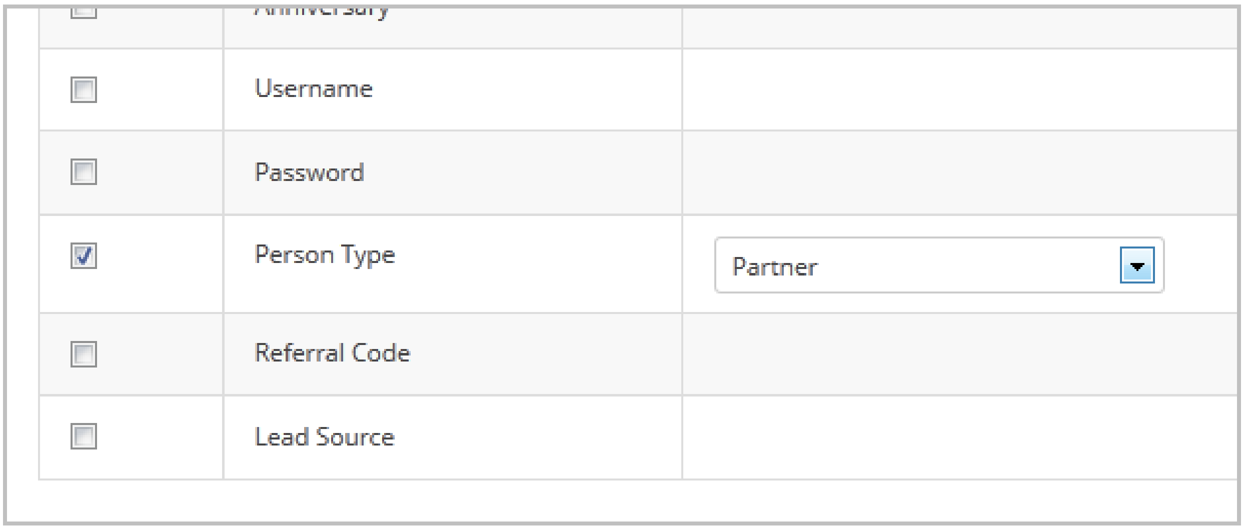
1. Go to **CRM** > **Contacts** and search for the contacts you want to update

2. Select the desired contacts to be updated, by selecting all, or individually selecting eligible contacts

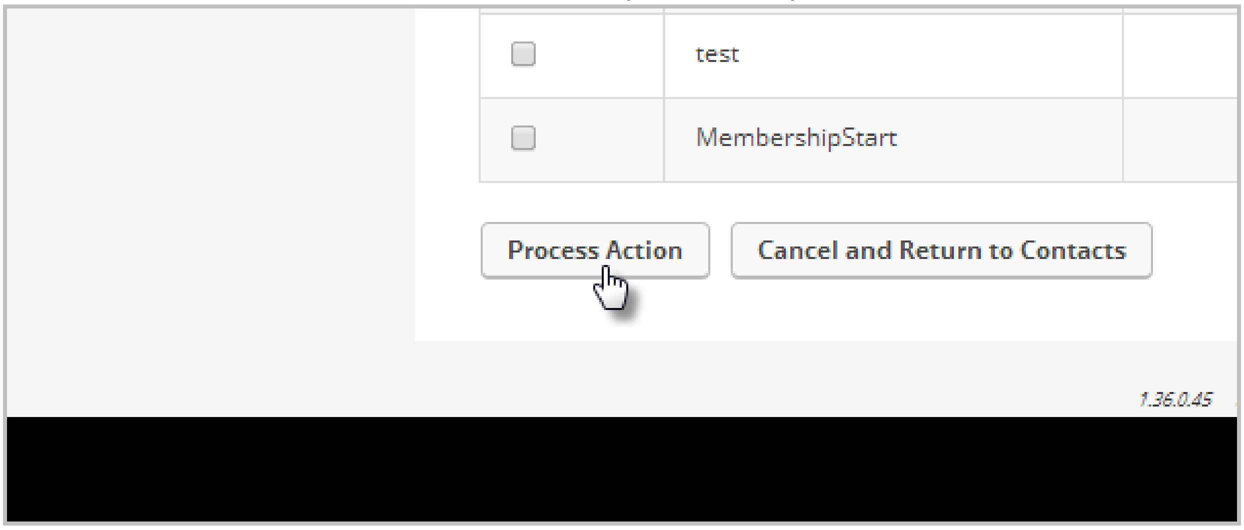
3. Once you have your list, click on the **Actions** button and select **Mass update Contacts** form the drop-down
   Note: You will only see this option if your permissions allow.



4. Mark the checkbox next to the field(s) you want to update and enter the updated information into the *Value* box



5. Click on the **Process Action** button to complete the update



Pro Tip! This same process can be used to update opportunities (CRM > Opportunities) or Referral Partners (CRM > Referral Partners)

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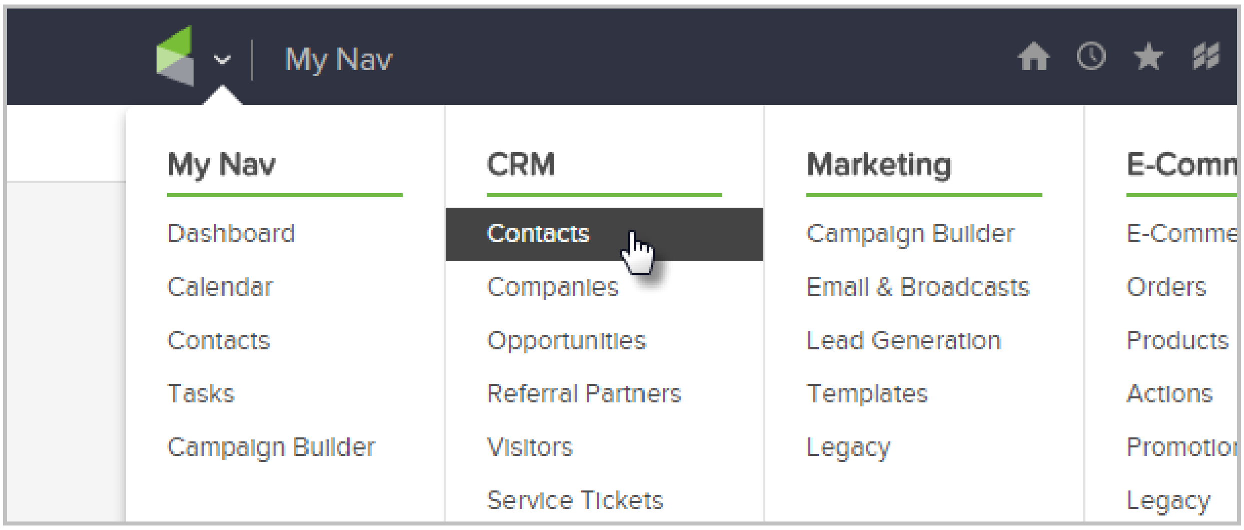
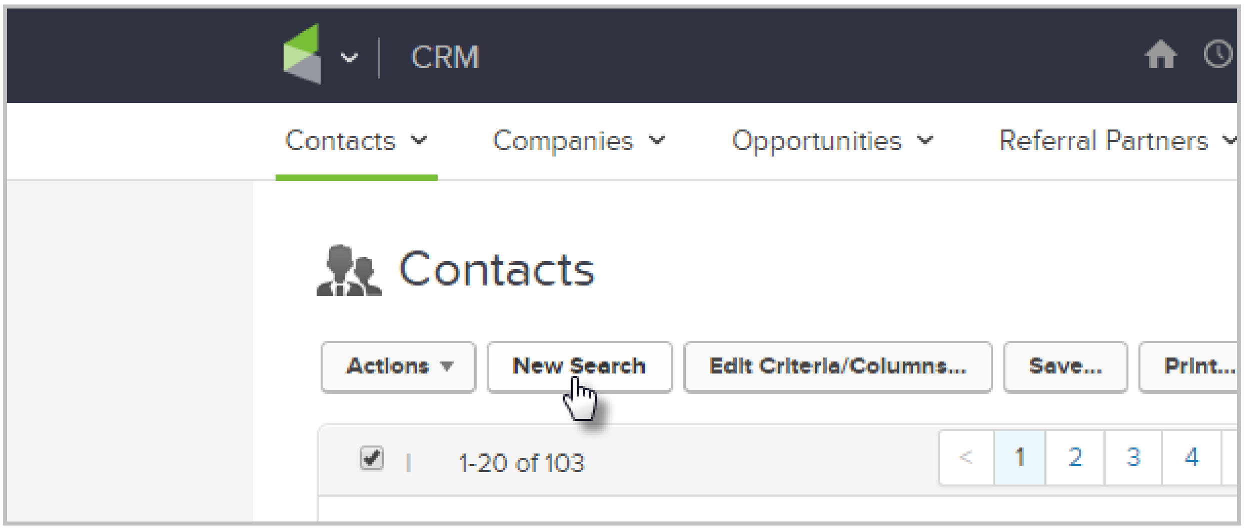
View Custom Fields In Contact Searches

Last Modified on 07/23/2018 1:01 pm MST

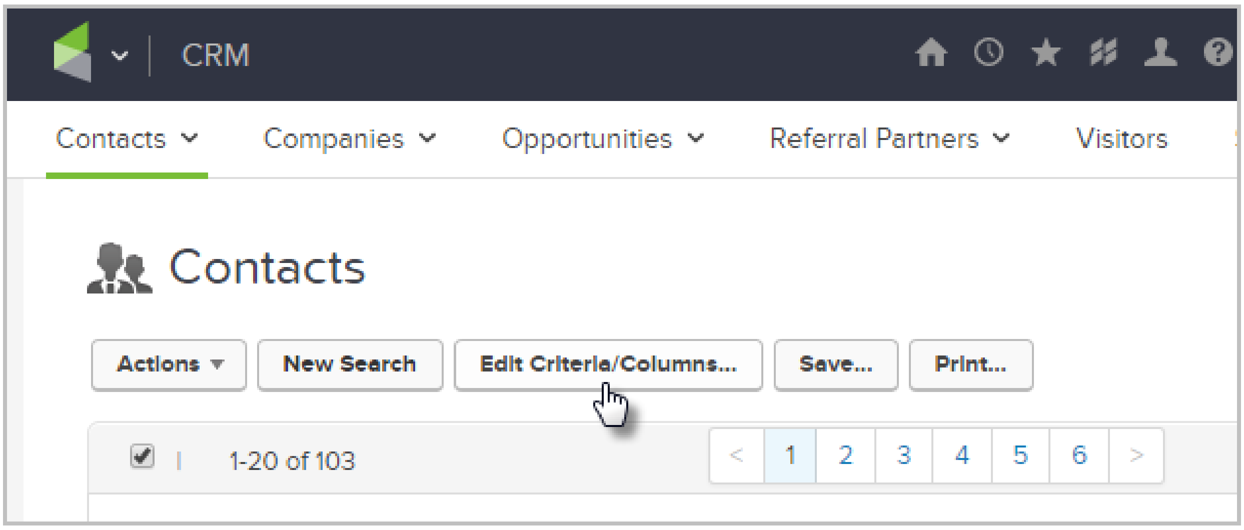
1. Navigate To Contacts Under CRM



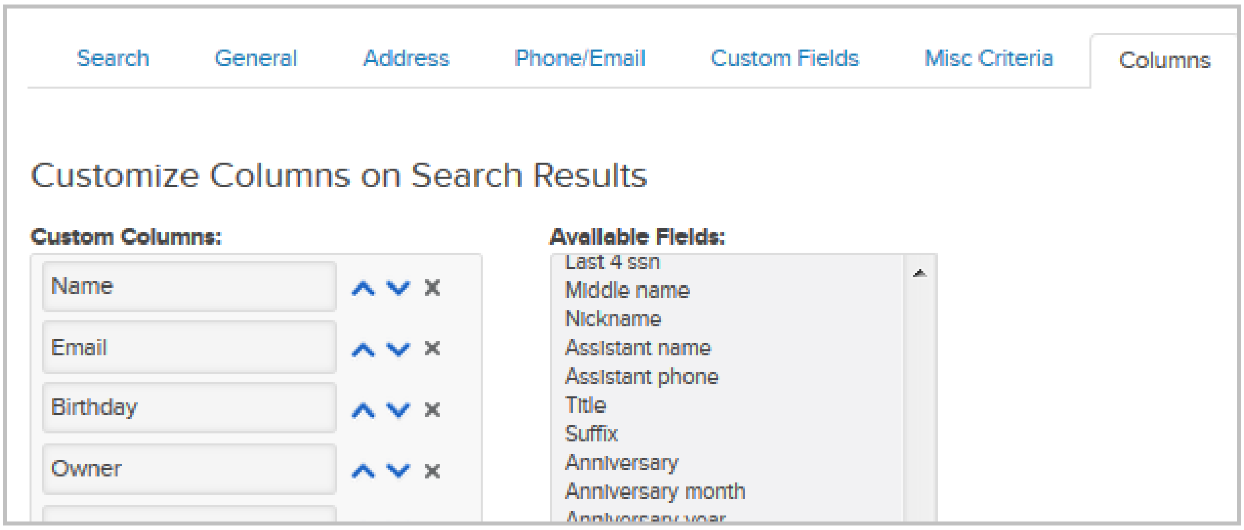
2. (Optional) Click on **New Search** if available. This will reset any previous search criteria



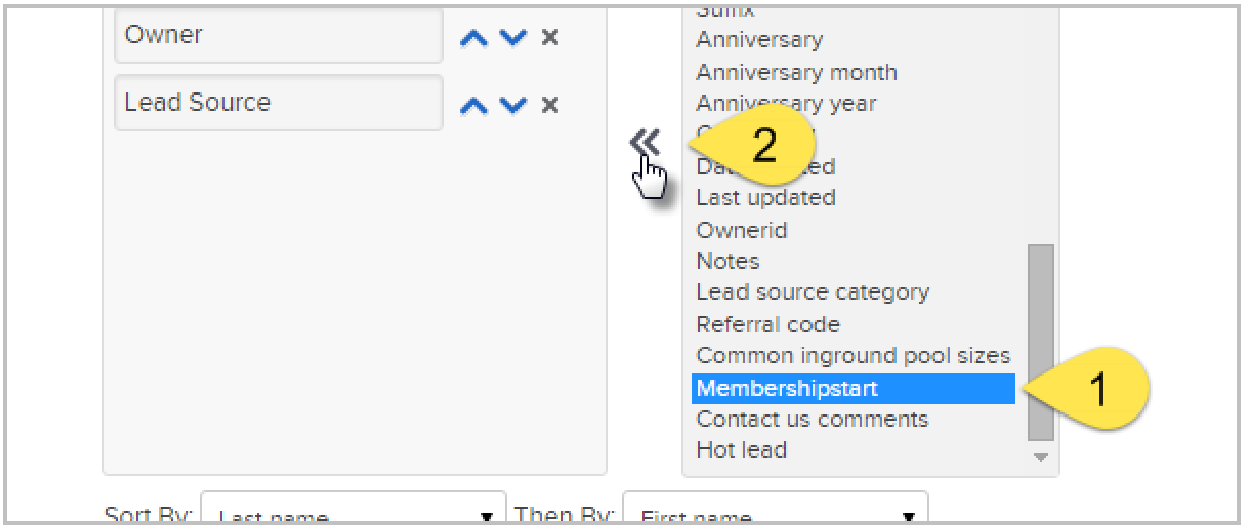
3. Click **Edit Criteria / Columns...**

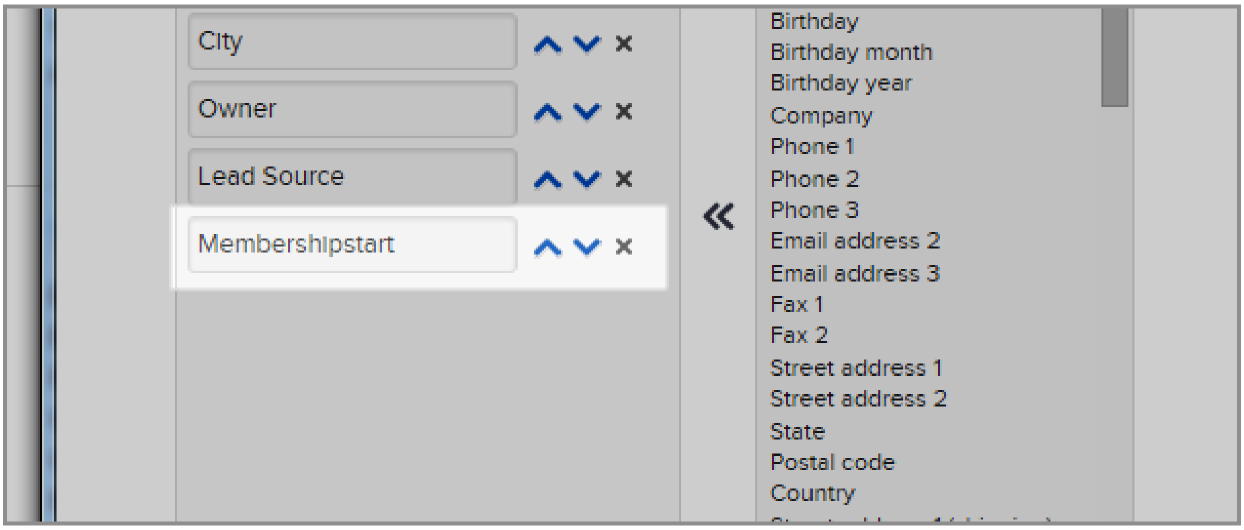


4. Click the **Columns** Tab

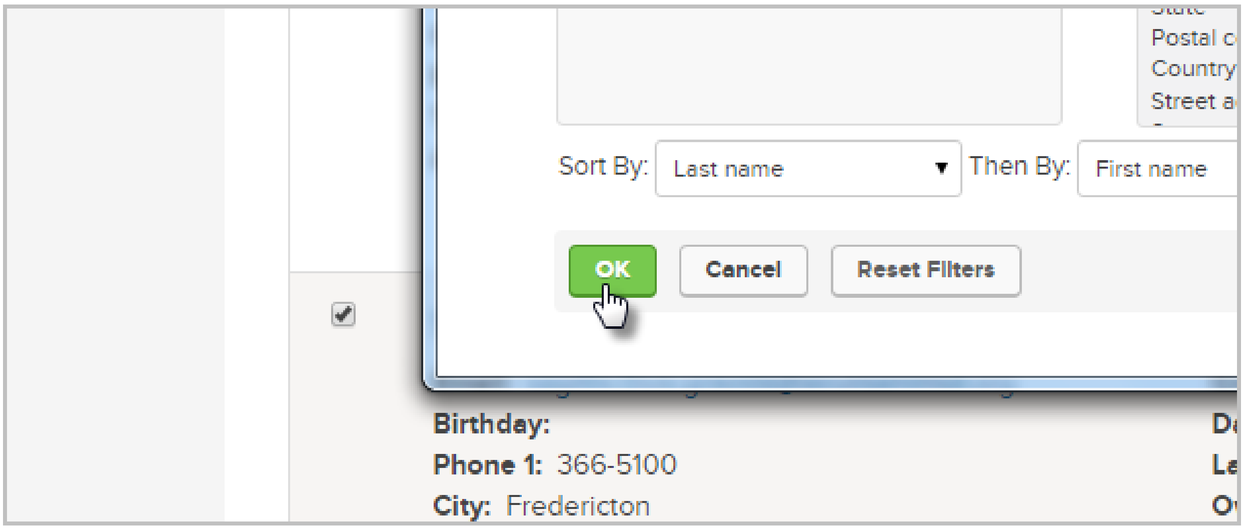


5. Add a Custom Field as a Column. Click on the name of the custom field in the "Available Fields" box and then click on the small arrows in between the boxes to move your field over to the left.



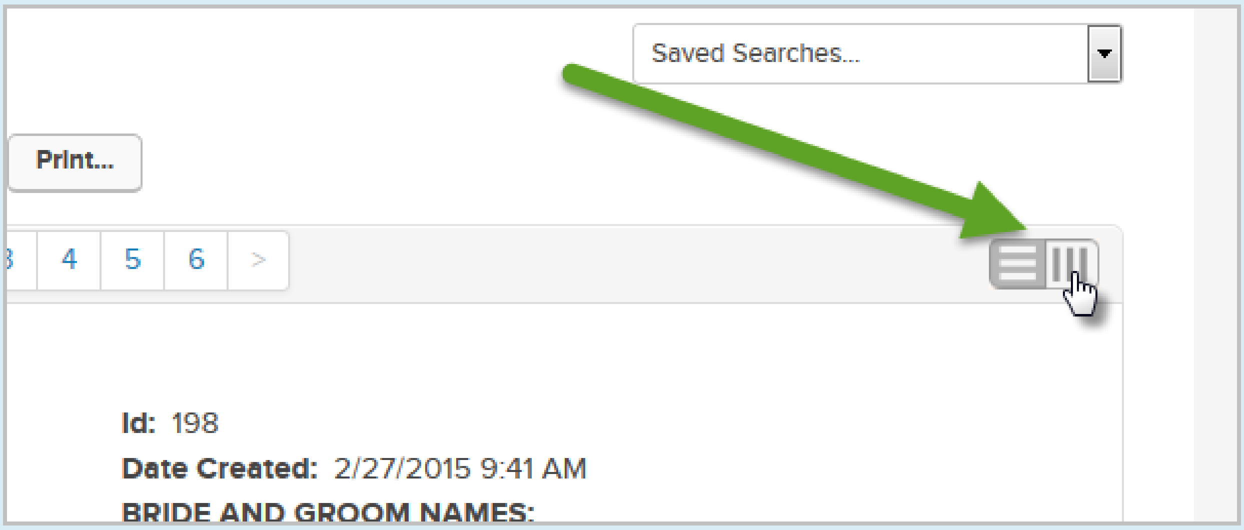


6. Click **OK**



7. Your custom field will now be available in the Search Results.

Pro-Tip! To scan a list of contacts more quickly, switch to "Grid View"!



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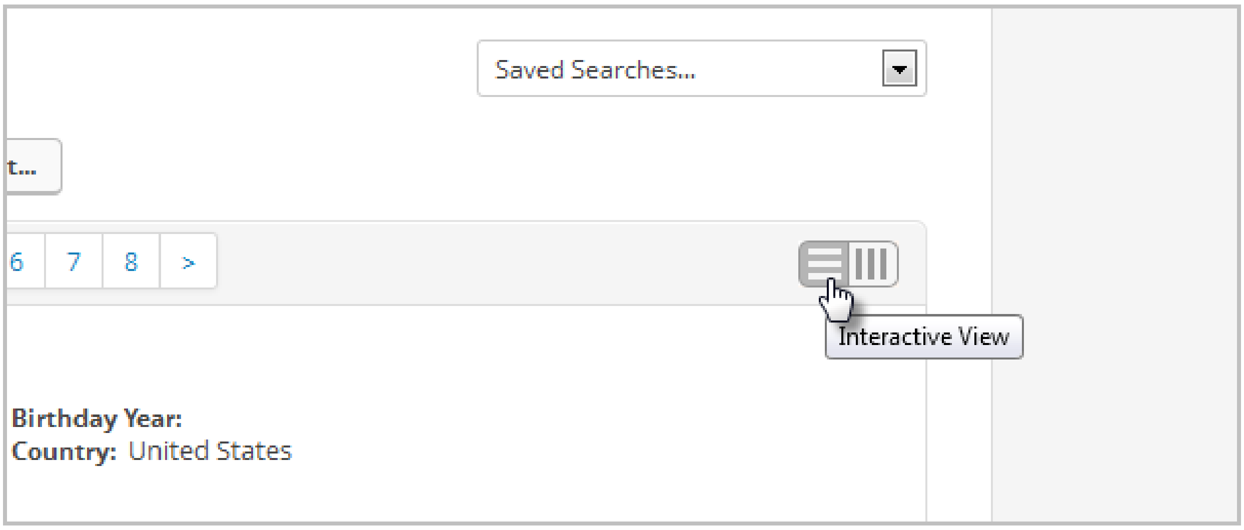
Interactive View Vs. Grid View

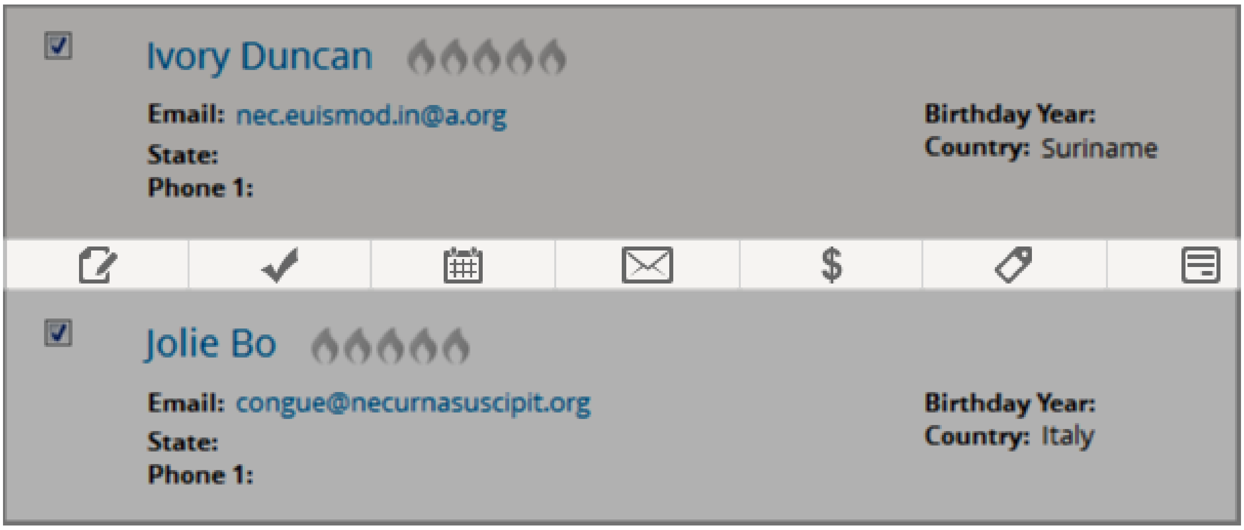
Last Modified on 07/23/2018 1:02 pm MST

There are 2 ways to view a list of contact and opportunity record s: an interactive view and a grid view. You are able to choose the viewing format that best fits the work you are trying to accomplish at the time. While viewing search results, toggle your view by clicking on the button of your choice. You can also make more contact fields available to edit by clicking on the **Edit Criteria/Columns...** link at the top of the page and clicking the **Columns** tab.



Interactive List View

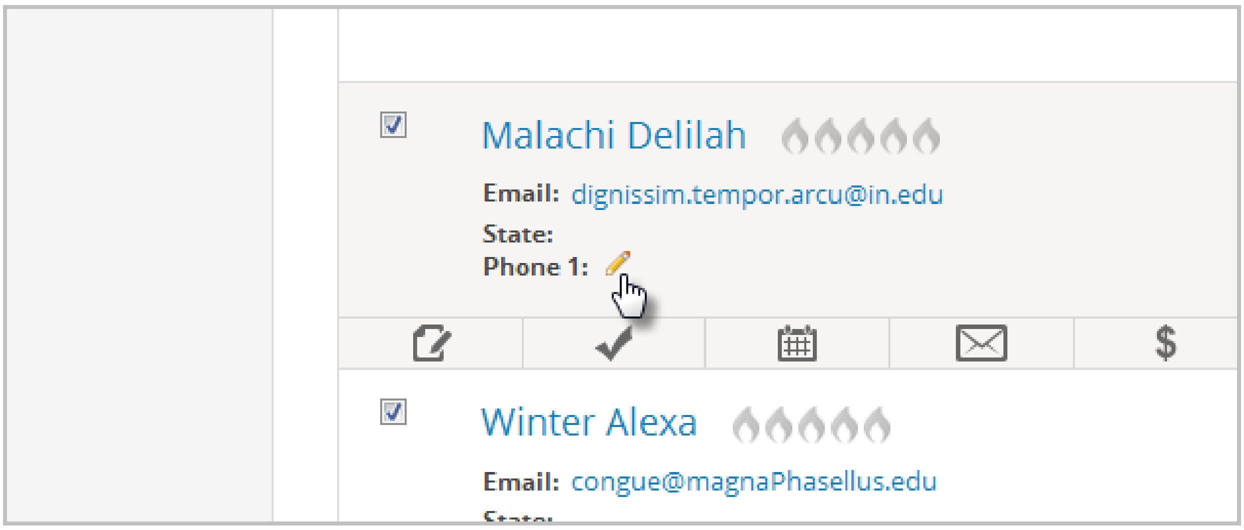
The interactive list view makes it fast and easy to work through a list of people or opportunities. You can easily add or update important contact information (e.g. email address or phone number) without clicking into individual contact records. The Interactive List includes inline editing tools so that you can quickly access and edit most contact record fields. You can also click on the interactive list view icons below each contact to do even more.



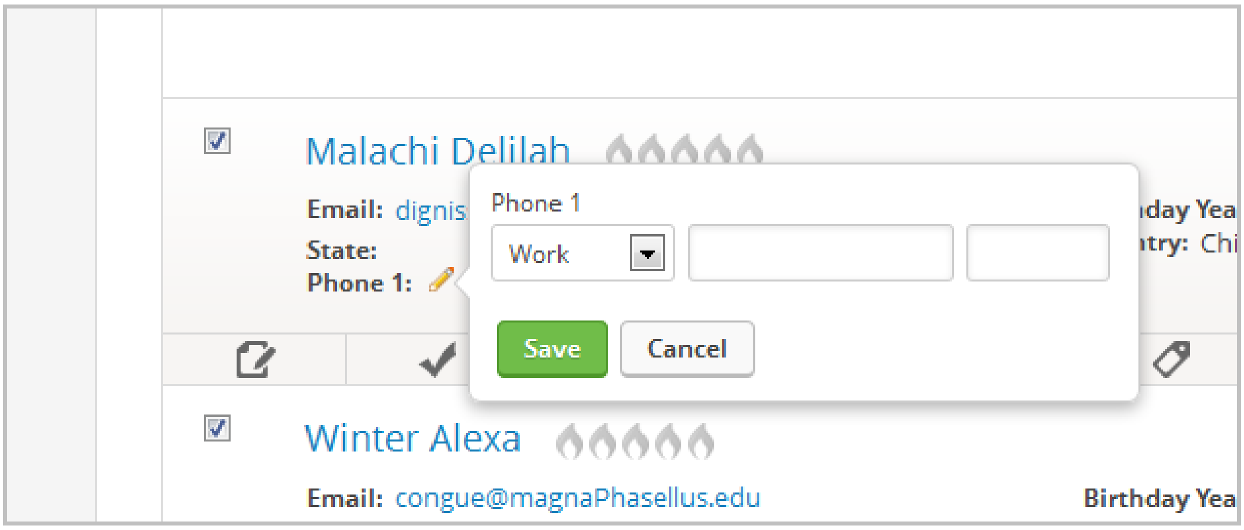
- Add a note or view the note history
- Add, view and update tasks & appointments
- Send an email
- View orders and quotes
- View, apply and remove tags
- Submit an internal form
- View recent and upcoming campaign events for that contact
- View legacy follow-up sequence events
- View lead scoring activity

Edit a Contact Record from the Interactive List View

1. Hover your mouse over the field you want to edit until see the pencil icon



2. Click the pencil icon to edit the field.



3. Click **Save**

Grid View

You may prefer the grid view when analyzing a large list of data. The grid view displays contact and opportunity records in a spreadsheet-style layout. It does not give you the ability to efficiently interact with the records you are viewing, but does give you the ability to align columns of data and view up to 500 records at one time. You can also click on column headers in the grid view to dynamically change the sort order of the list. As with Interactive view, you can click the **Edit Criteria/Columns** link at the top of the search results, then click the **Columns** tab to change which fields are displayed in the search results.

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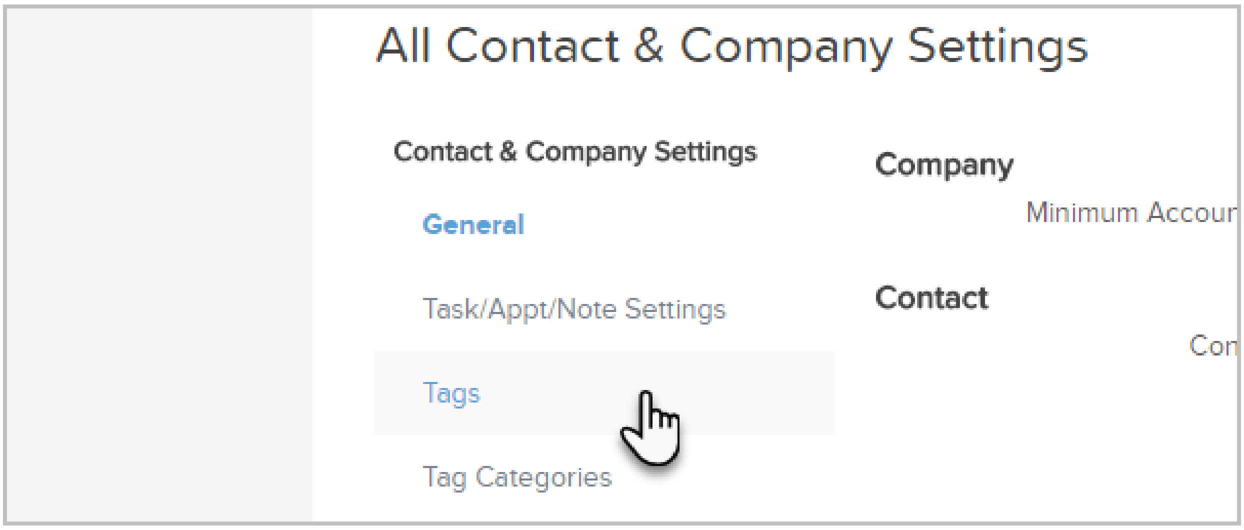
Create a Tag

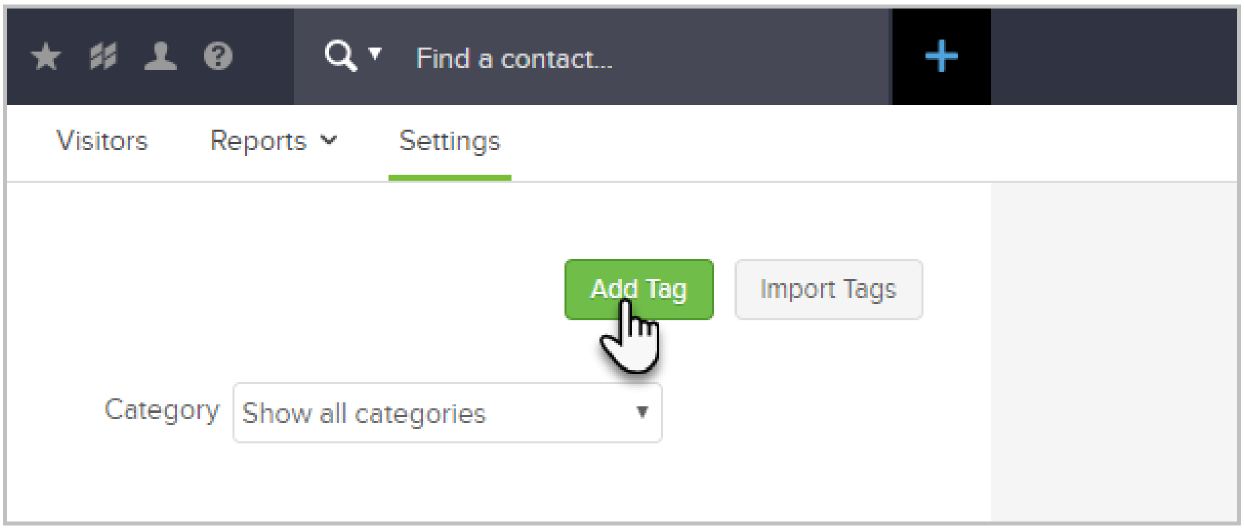
Last Modified on 07/23/2018 1:02 pm MST

There are many ways to create tags in Infusionsoft. Many times you will create them on-the-fly while creating campaigns, contact records, emails, landing pages, etc... You can also simply go to CRM > Settings > Tags and start creating new tags or manage your existing tags.

1. Go to **CRM** > **Settings** > **Tags**



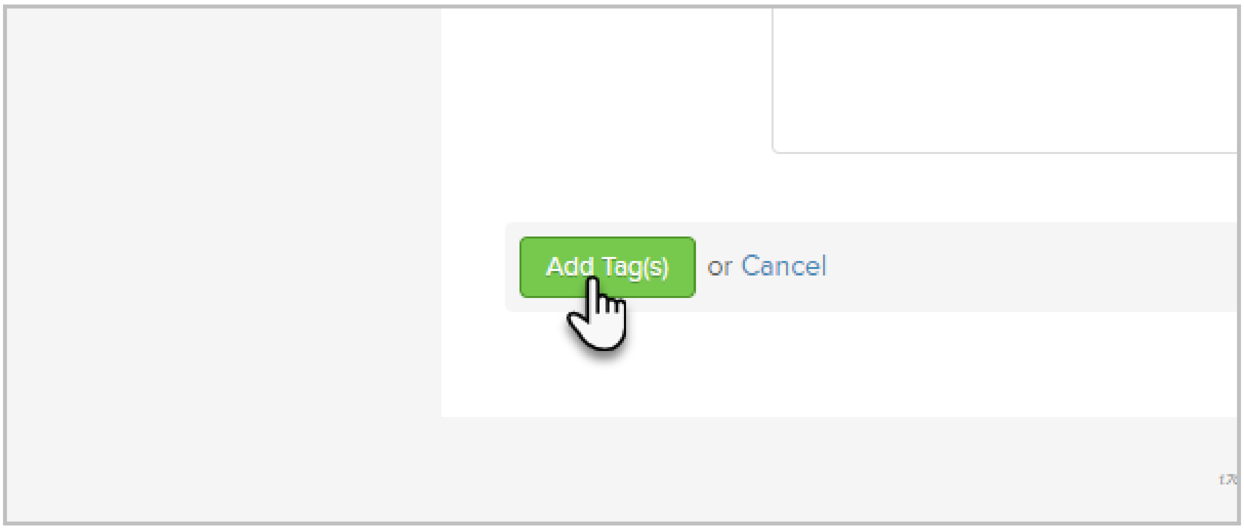
2. Click **Add Tag**



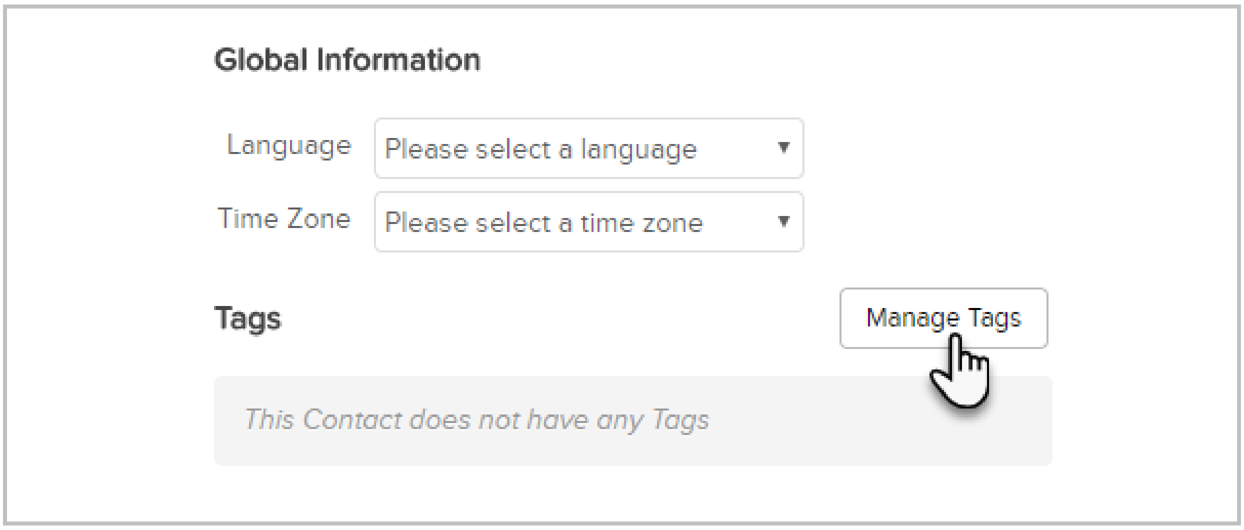
3. Give your tag a name and choose a category. You can create a new category by entering

one in the (Other box). Optionally, you can add a description to remind you and other users the purpose of the tag

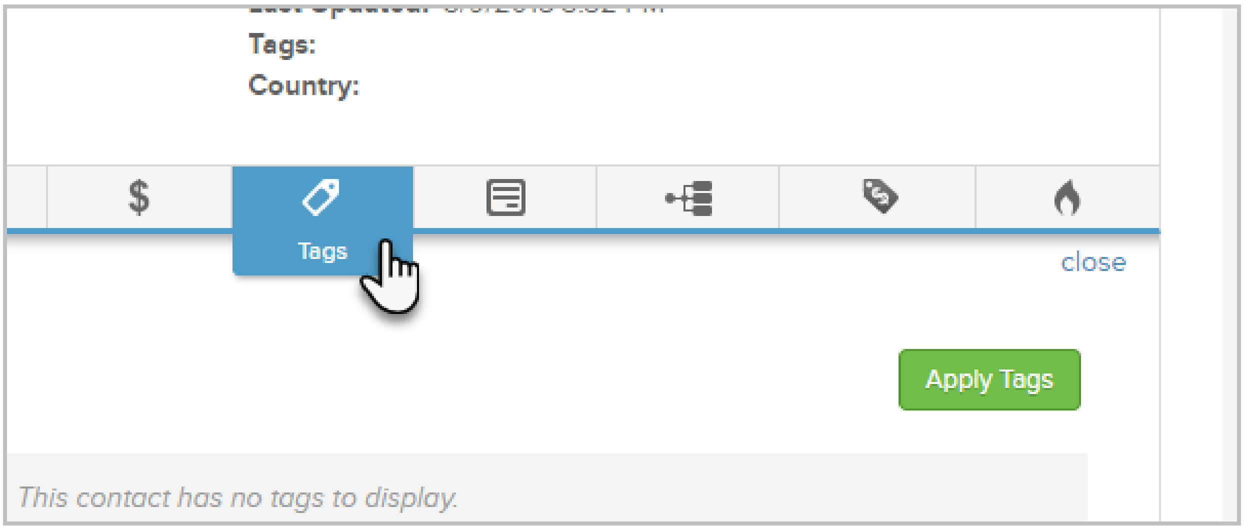
4. Click the **Add Tag(s)** button



5. The tag is now available in any area of Infusionsoft that allows you to apply a tag. For example, while on a contact record, you can click the Manage Tags button located on the right column of the contact record.



6. If you are looking at a list of contacts, you can quickly manage their tags by clicking the **Tag** icon.



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Identify Duplicate Contact Records

Last Modified on 07/23/2018 1:04 pm MST

After your initial data import, you should run a duplicate check to consolidate data. The dup check tool identifies two matching records at a time based on the criteria you select. You may need to run the dup check and merge (dedupe) several times to identify all of the duplicate records in your system. After the initial data import, you should check for duplicates on a periodic basis. This will help keep your database from getting bloated and help ensure your lists and reports are accurate.

Pro-Tip! This process only identifies the duplicates. In the next user guide, you will learn how to actually merge duplicate records.

1. Go to **Admin** > **Data Cleanup** in the main navigation menu

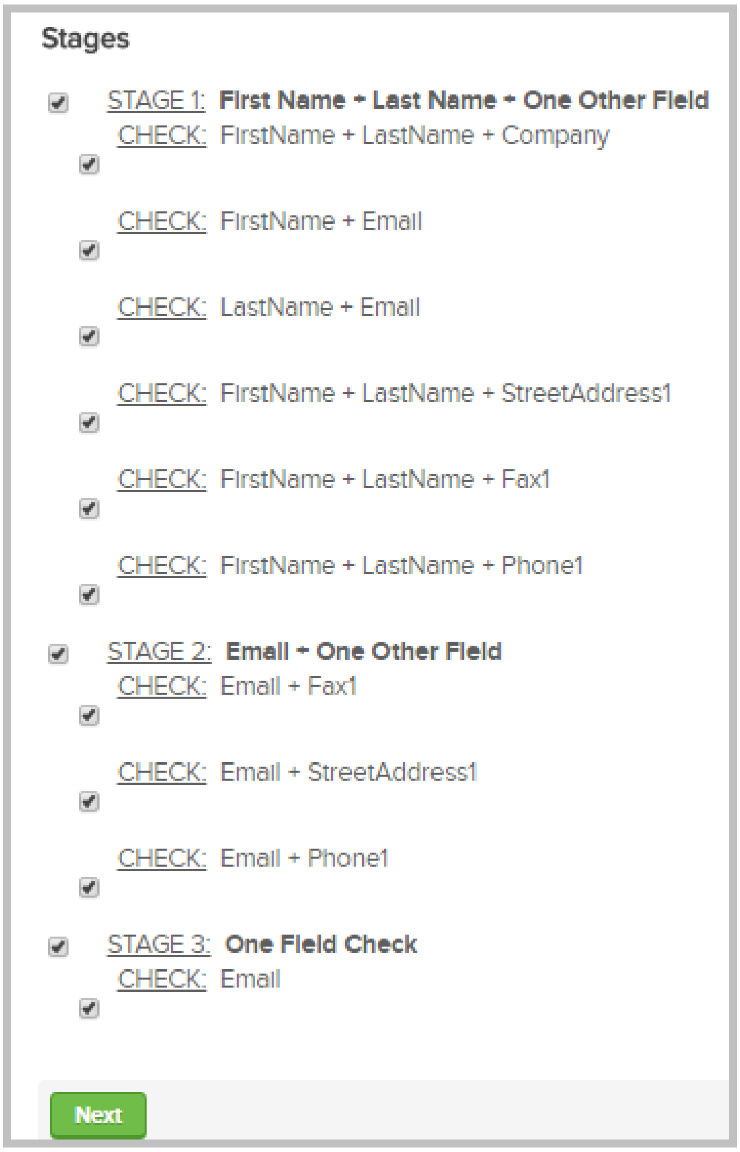
2. Click on **Check for Duplicate Contact Records**

3. Review the Intro to Duplicate Checking summary and click **Next**

4. Choose Who to Check:
    1. All records: Checks all contacts, even if they've already been checked before.
    2. All records that haven't been marked as a dup before: Checks only contacts that have not already been identified as a duplicate.
    3. Records that haven't been checked already: Omits all of the contacts that have already been checked at some point in the past.

5. Choose the checking logic, and then click Next.

    Review the logic summary to understand the logic behind stages and checks and the order in which the checks are run. Uncheck all of the boxes and select the criteria you want the system to use to identify duplicates. The best criteria is absolutely unique to an individual. In most cases, the email address is a good, unique identifier.



6. Click on OK to confirm you're ready for the dup check to begin

7. The system will run the dup check and then give you 3 options:
    1. View the list of contact records that are considered duplicates: Choose this to look at the list of duplicate contacts.
    2. Go back to clean up more of your data: Choose this to view all data cleanup options, including auto-merge.
    3. Click here to see all of your contacts: Choose this to see a list of all of your person records (not just the duplicates.)

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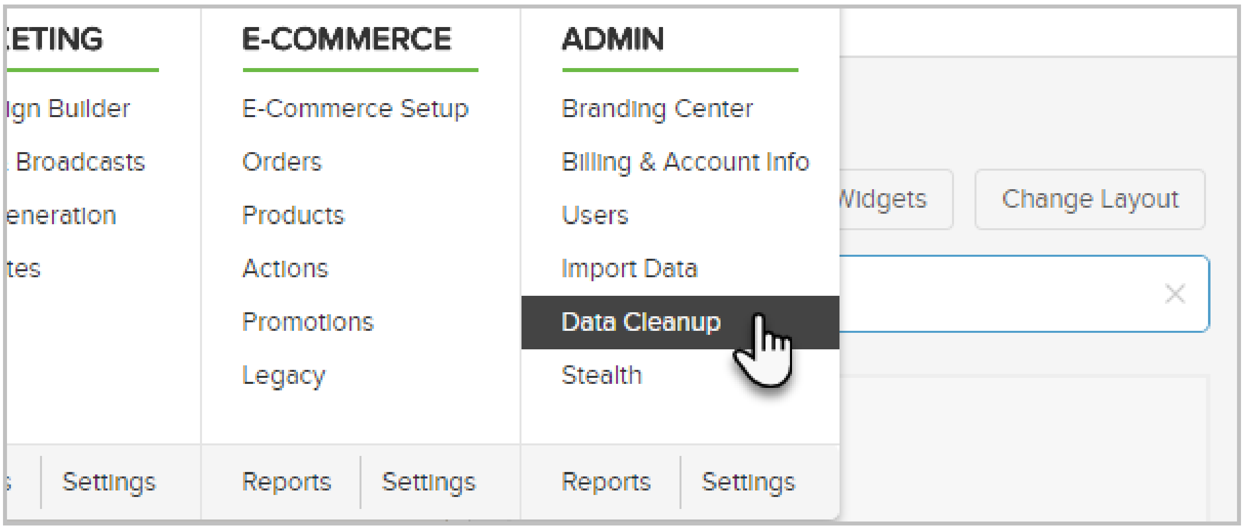
Automatically Merge Duplicate Contacts

Last Modified on 07/23/2018 1:05 pm MST

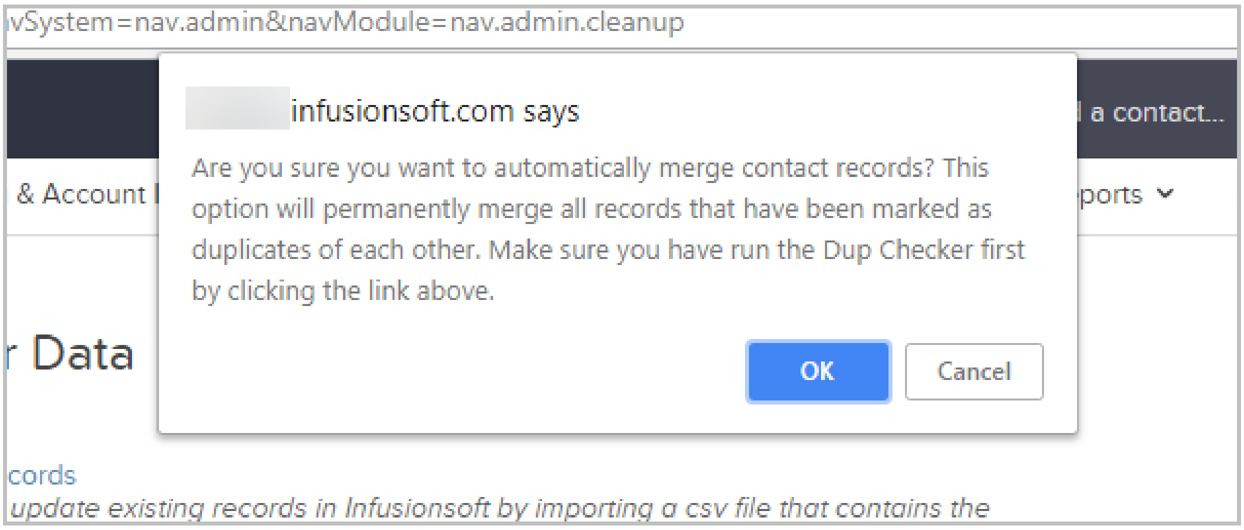
Pro-Tip! Infusionsoft can automatically merge (de-dupe) duplicate contacts once they've been identified. This is the most common option for a large database of contacts. **When you automatically merge duplicates, you do not have a chance to review them prior to merging.** The system automatically merges all identified duplicates at once. **The auto-merge will take information from the newer contact record and use it to update the information in the older (original) contact record, based on the records' ID numbers. The merged record will contain all of the tags , history, notes, etc. from both records.**

1. After running the duplicate check , go to **Admin** > **Data Cleanup**.



2. Choose an Auto Merge Option:
   1. **Merge Duplicate Contact Records By Overwriting Old Data With New Data** Choose this option to replace old data with the newer data and add data that did not exist in the original contact record.
   2. **Merge Duplicate Contact Records By Only Adding New Data, Not Overwriting Old Data:** Choose this option to keep all of the existing data in the original record and only add missing information.

3. Click **OK** to acknowledge that this step is irreversible and continue with the merge. You can now view the new list of merged records or return to clean up more data.



Warning! You cannot un-merge data after the auto merge!

Using a different version of Infusionsoft? Click Here to learn more

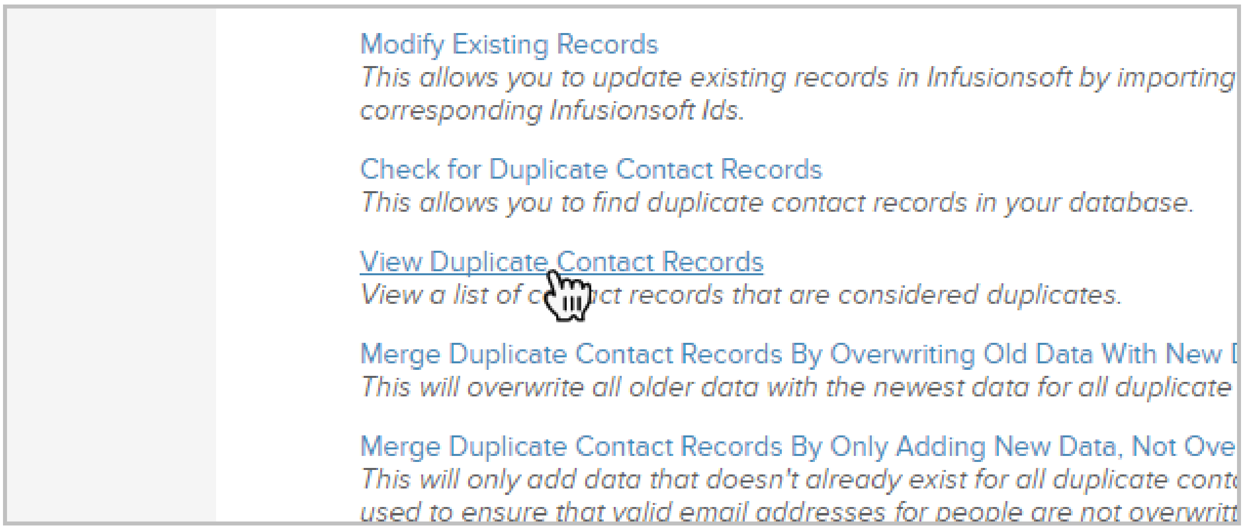
Manually Merge Duplicate Contacts

Last Modified on 07/23/2018 1:06 pm MST

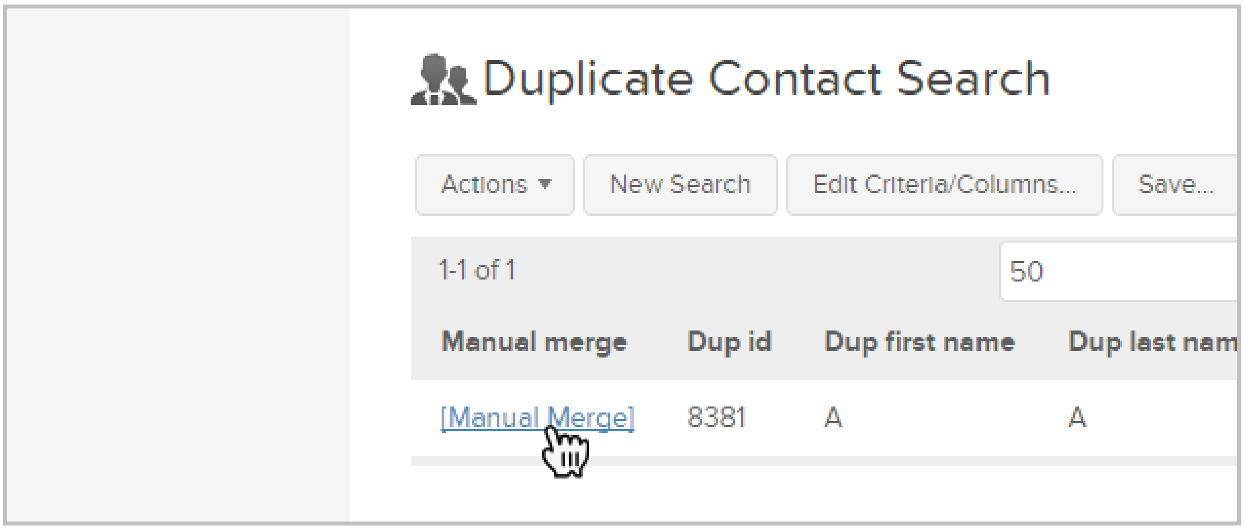
Pro-Tip! Manually merge (de-dupe) duplicate contacts if you want to maintain control over the merge process. When you do a manual merge, you are able to review duplicates and decide to merge or not to merge each record on an individual basis. You might choose to manually merge duplicates if you are not completely confident in the accuracy of the criteria you set when you checked for duplicates, your database is not too large, or you run frequent duplicate checks.

1. After you run the duplicate checking process, go to **Admin** > **Data Cleanup** in the main menu

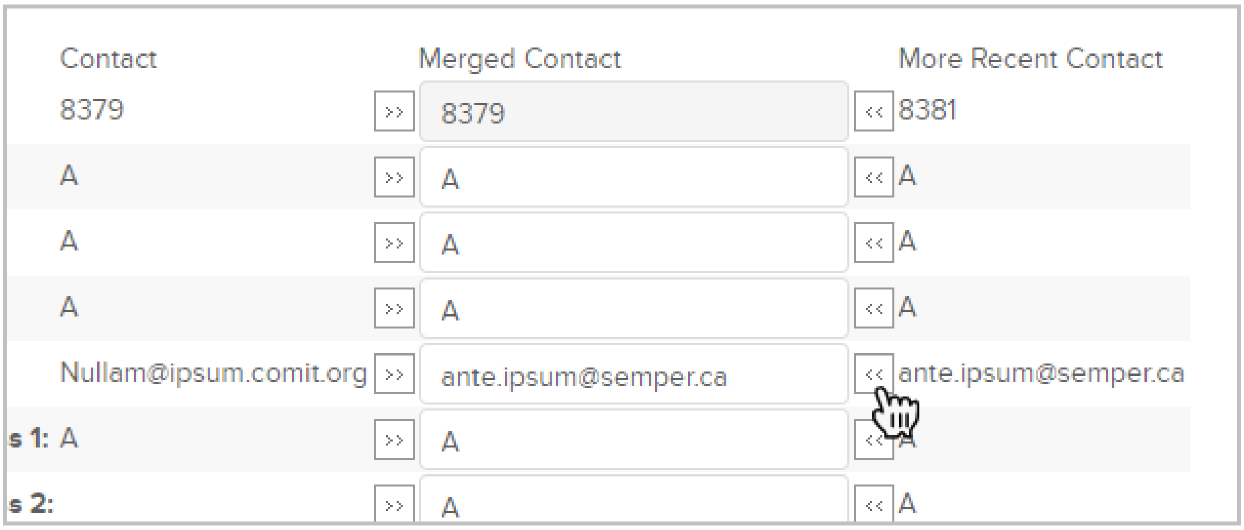
2. Click on the **View Duplicate Contact Records** link



3. Click on **Manual Merge** beside one of the duplicates to view the match before merging. The older information for the person is on the left, and the newer information is on the far right. The center displays what the contact record will contain after the merge.



4. Click on the arrows to adjust the information in the center column to make sure the correct information is maintained.



5. Choose a merge option:
   - **Merge & View Contact:** Completes the merge and takes you to the new Person Record.
   - **Merge & Return to Search**: Completes the merge and takes you back to the list of duplicate records.
   - **Mark as Not Duplicates:** Removes the records from the duplicate list.

6. Repeat the process for each identified duplicate.

Using a different version of Infusionsoft? Click Here to learn more

When Does The System Automatically Merge Contacts

Last Modified on 07/23/2018 1:06 pm MST

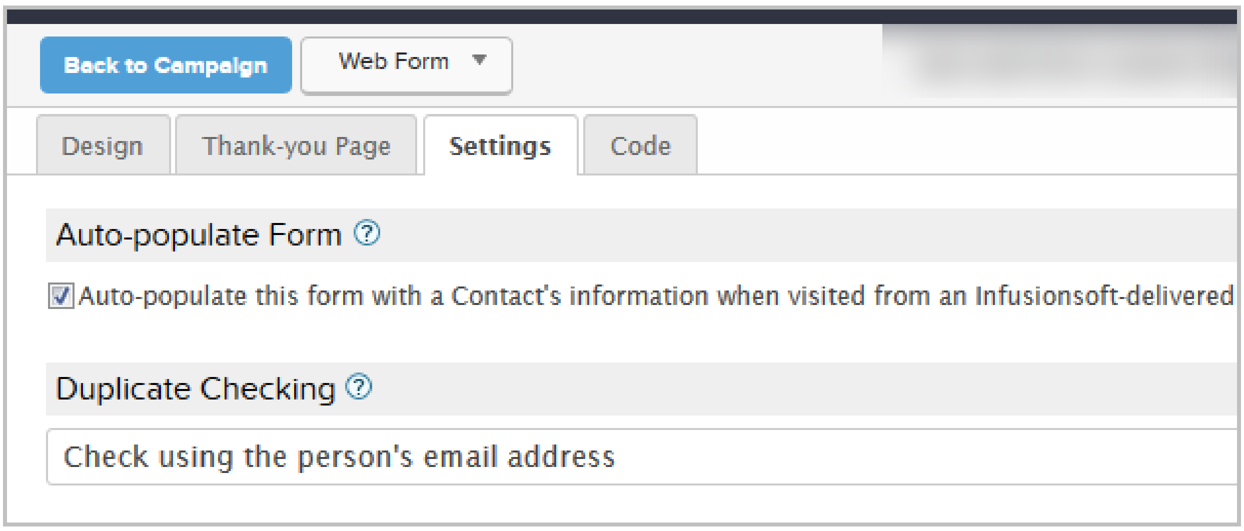
Pro-Tip! Infusionsoft does not automatically merge contact records together. Though listed here are times the system will auto update a contact record with newer information instead of creating a new contact record. All other methods of merging contacts have to be triggered or started by you.

Filling Out A Web Form, Landing Page, Or Internal Form

By default, Infusionsoft will check the email address entered into the form. If this is the same as what is on an existing contact, Infusionsoft will update the contact record with any new information that was entered in the form.

This setting can be edited for existing forms. Go to the form's Settings tab and adjust the "Duplicate Checking" Options. Don't forget to publish the campaign with these changes or they will not take effect.

The default setting for new forms can be edited in the Branding Center.



Placing An Order On The Shopping Cart Or Order Forms

Unlike the other forms, an order's duplicate checker settings cannot be edited - they are preset to check by First Name, Last Name, and Email Address.

Performing A Mass Update From A Spread Sheet

This too is different from the Import Data tool in that it allows data to be updated from the .csv file to existing contacts. To use this tool, the contact's system ID numbers are required. For more details on this check out this help article .

Using a different version of Infusionsoft? Click Here to learn more

Mass Update Contacts With a Spreadsheet CSV File

Last Modified on 07/23/2018 1:06 pm MST

You can use the Infusionsoft Modify Existing Records Import tool to mass update a specific list of contacts. This mass update option allows you to update a group of existing contacts. For example, you may need to add country information to all of your existing contacts. You can export a list, add each person's country information to it, and then import it back into Infusionsoft to update your existing contact list. The Contact ID field must be included in the export and the updated import file.

Warning! The new information will permanently overwrite existing information in the updated field(s). The only exception is the Contact Notes field; this field can only be appended to. Updates performed through the Import tool cannot be reversed. Make sure you preview the field matching before you complete the import.

Part 1 - Find a List of Contacts

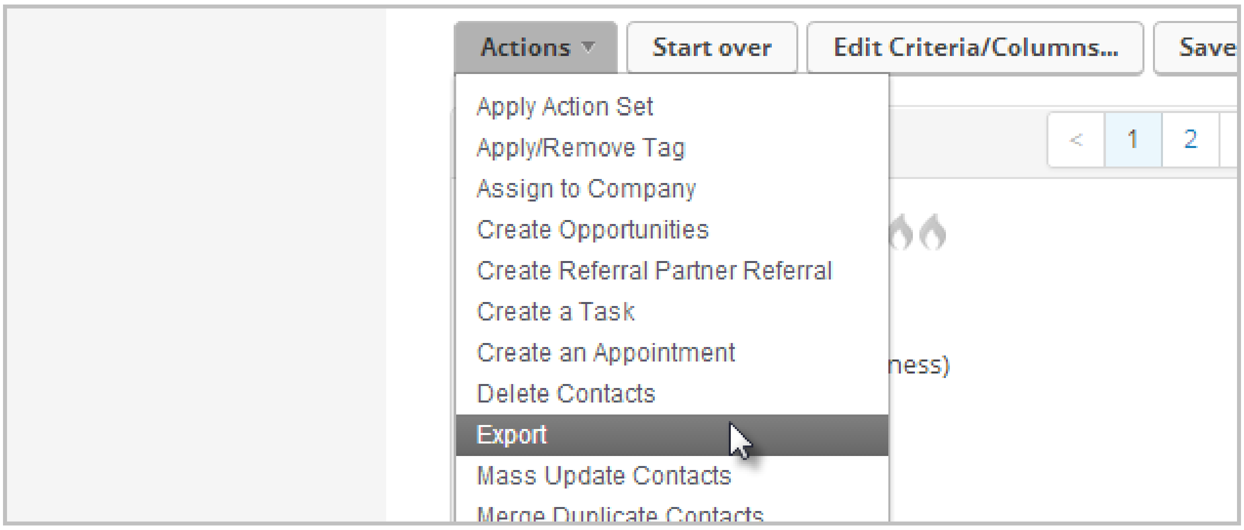
1. Go to **CRM** > **Contacts** in the main navigation menu.

2. Select a saved search from the drop-down or click on**Start Over** to enter new search criteria and then click the **Search** button.

3. Verify you have the correct list.

Part 2 - Export the List

1. Click on the **Actions** button and select **Export**



2. Choose the fields to export. All of the fields are selected by default. Click on the top check box to clear the selections. Mark the boxes next to the fields you want to include in the export. **You MUST include the Id field**.

3. Save the file to your computer.

Part 3 - Add or Change Data

1. Open the csv file to change or add fields. You can add fields by inserting a new column on the spreadsheet. Make sure you add a descriptive header to the top of the column.

2. Remove unnecessary columns from the spreadsheet. Only import the Infusionsoft ID column and columns that contain updated information.

3. Save the revised file.

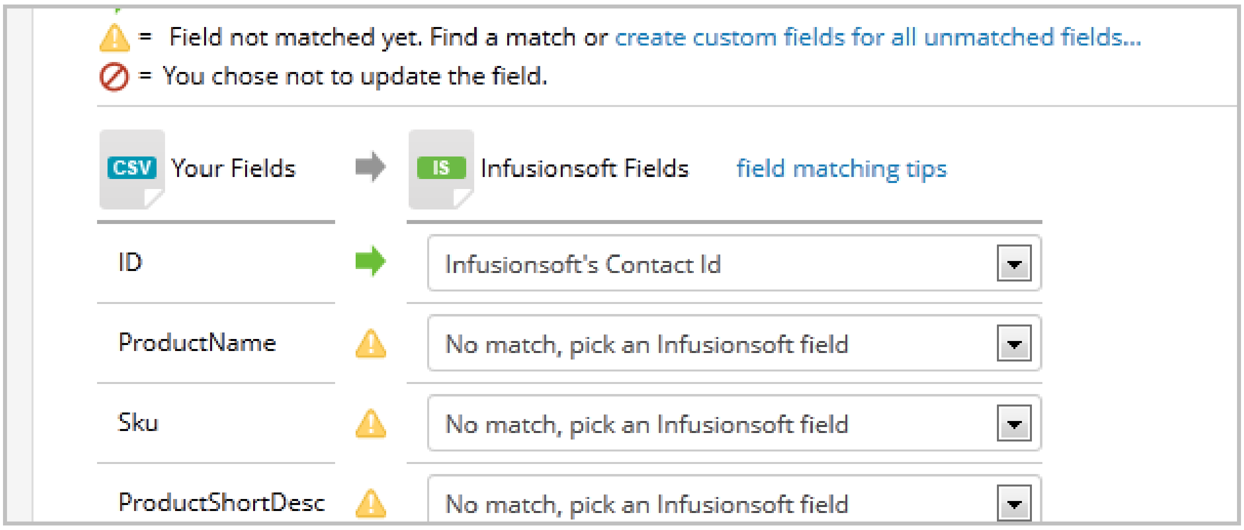
Part 4 - Import The Updated List

1. Go to Admin > Data Cleanup in the main navigation menu

2. Click on Modify Existing Records. Select the data type and click on Go

3. Click on Browse to find the revised csv file on your computer, and then click Next

4. Match the Fields. The ID Field must match with the Infusionsoft ID Field



5. Follow the import wizard instructions to complete the process

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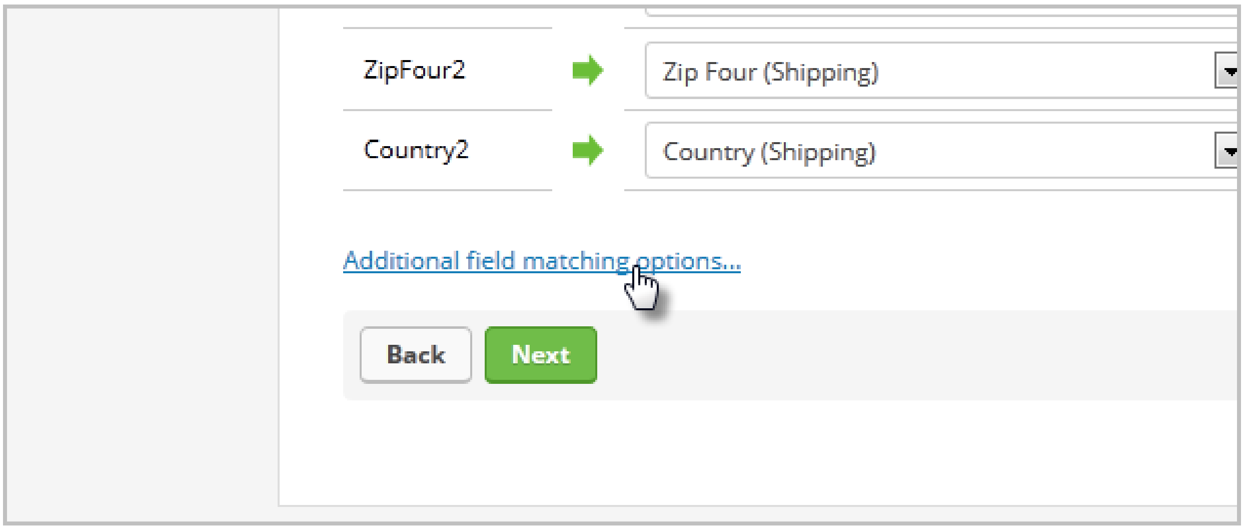
Populate Multiple Fields With A Single Field From Your Spreadsheet

Last Modified on 07/23/2018 1:07 pm MST

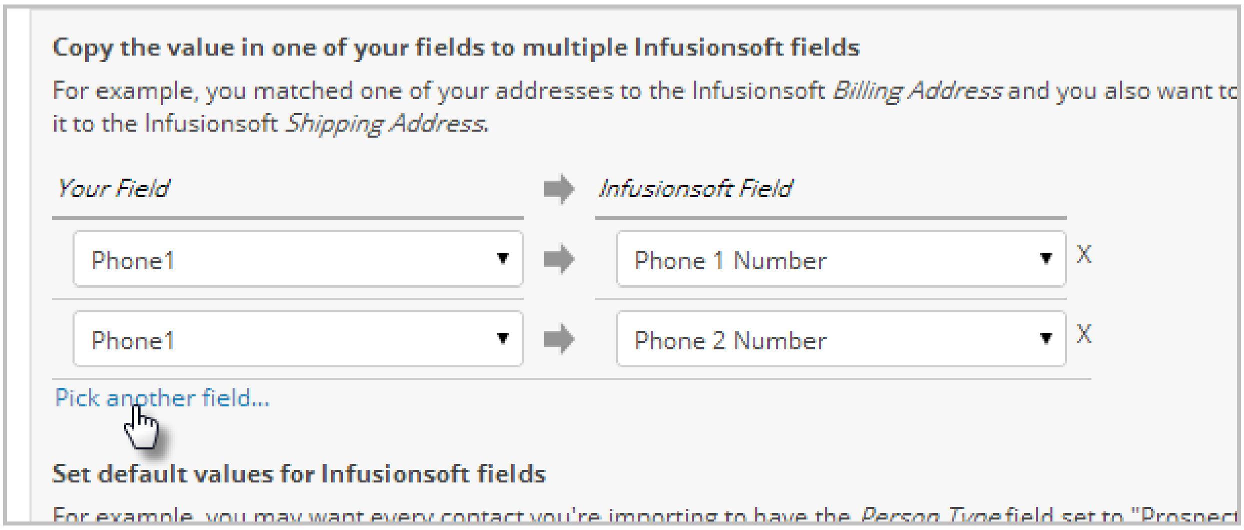
When you import a list, you are able to populate multiple Infusionsoft fields with data from one Infusionsoft field. For example, you can use the address data in your spreadsheet to populate both the Billing and the Shipping address fields in Infusionsoft. You can also use the additional matching options to set default values for Infusionsoft fields during import, even if the field data is not included in your spreadsheet file (e.g., set the Person Type field to Prospect or Customer.)

Click on the **Additional Field mapping options** link to populate multiple fields with data from your spreadsheet or to set default field values.



To populate data to more than one field

1. Select the first Field from the *Your Field* drop down
2. Now select the target Field from the Infusionsoft Field drop down.
3. Click **Pick another field** to repeat the process for additional fields.



To auto-populate an Infusionsoft field

1. Select a field from the drop down

2. Type in the value you want added to that field. This information is added to the field for all of the contacts on the import list.

3. Click **Next** to complete the import process.

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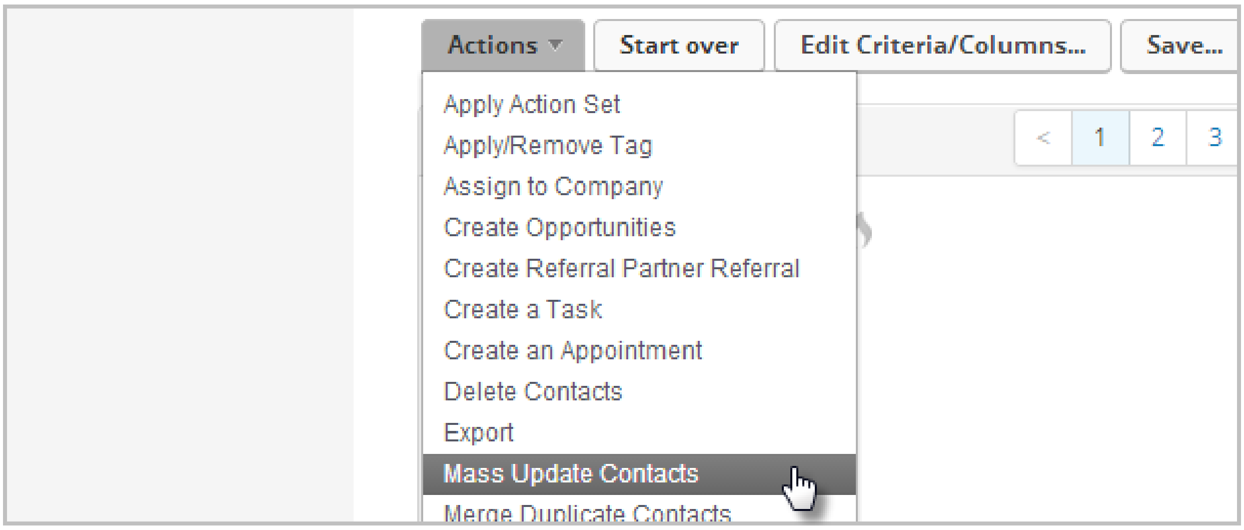
Mass Update A Specific Field for a List Of Contacts

Last Modified on 07/23/2018 1:07 pm MST

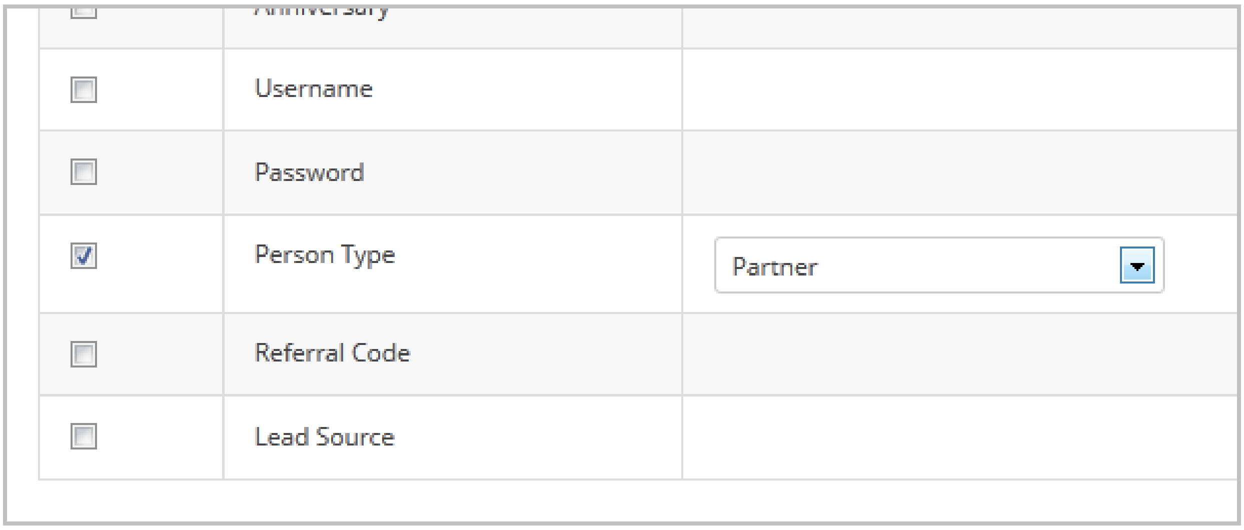
1. Go to **CRM** > **Contacts** and search for the contacts you want to update

2. Select the desired contacts to be updated, by selecting all, or individually selecting eligible contacts

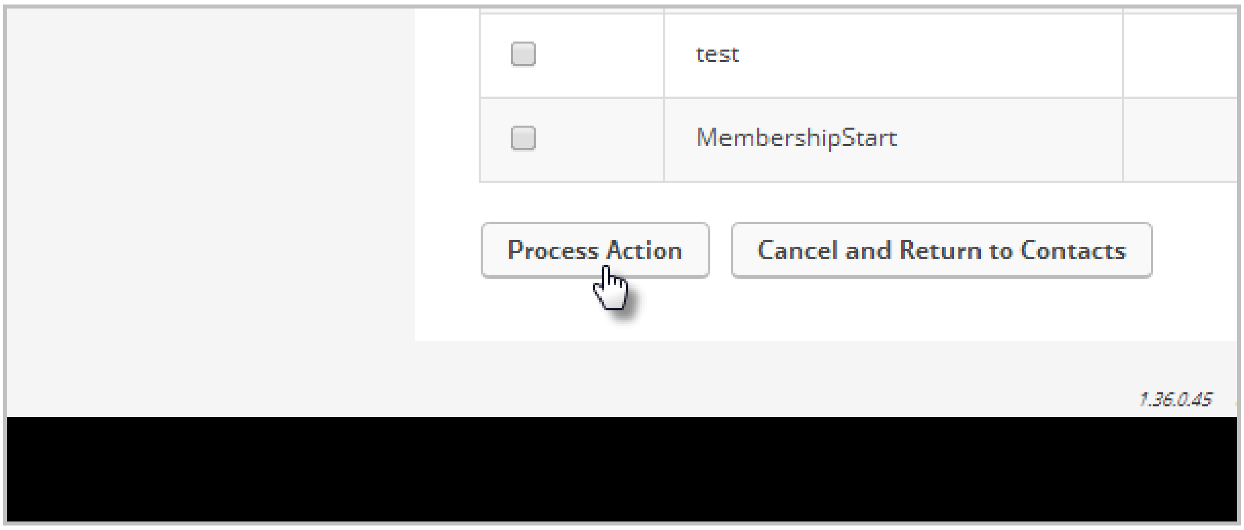
3. Once you have your list, click on the **Actions** button and select **Mass update Contacts** form the drop-down. Note: You will only see this option if your permissions allow



4. Mark the checkbox next to the field(s) you want to update and enter the updated information into the *Value* box.



5. Click on the **Process Action** button to complete the update.



Pro Tip! This same process can be used to update opportunities (CRM > Opportunities) or Referral Partners (CRM > Referral Partners)

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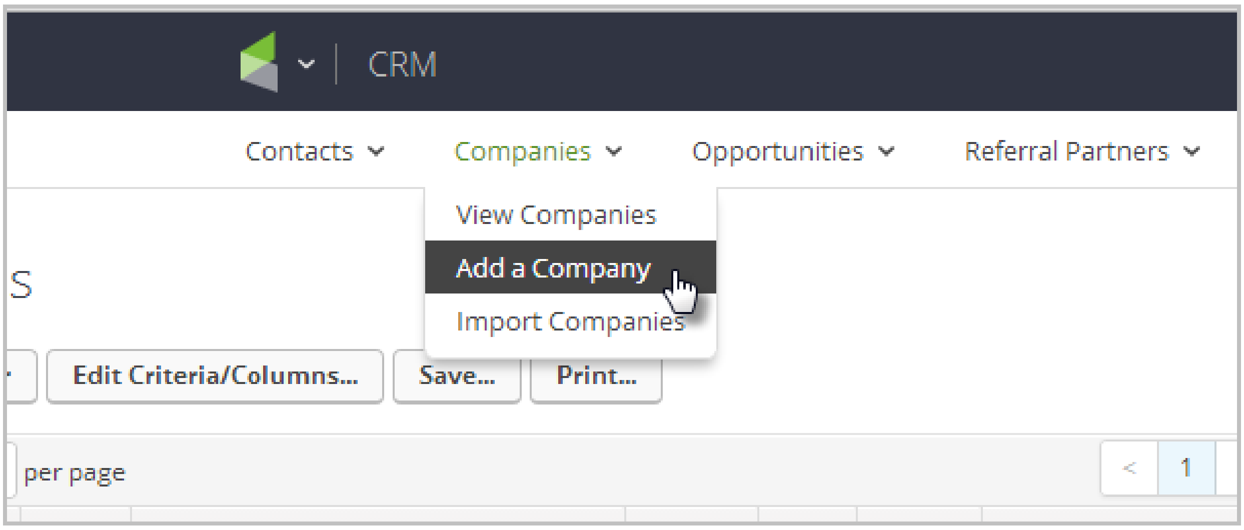
Create a Company Record

Last Modified on 07/23/2018 12:13 pm MST

To Create a Company Record

1. Go to **CRM** > **Companies** in the master nav.

2. Select **Add a Company** from the company menu.



3. Enter the Company Information.

4. Click on the **Save and Add a Contact to this Company** button. Note: You must link at least one person to the company.

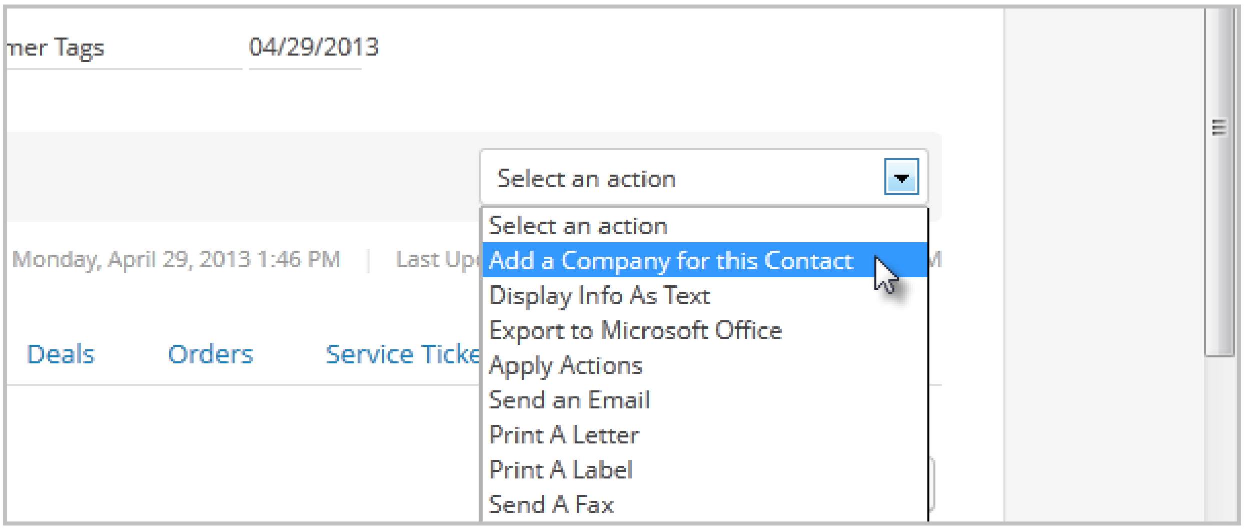
5. Enter the contact information.

6. Click the **Save & View** button of your choice, or click on **Save and Add a Contact to this Company** button to enter another contact.

To Create a Company from an Existing Contact Record

1. Open the contact record

2. Click on the contact actions drop-down and select **Add a Company for this Contact.**



3. Add to or edit the information in the company record.

4. Click the **Save** button to save the new company record.
5. (Optional) Click on the **Contacts** tab in the top row to link more people to this company.

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Company Record Overview

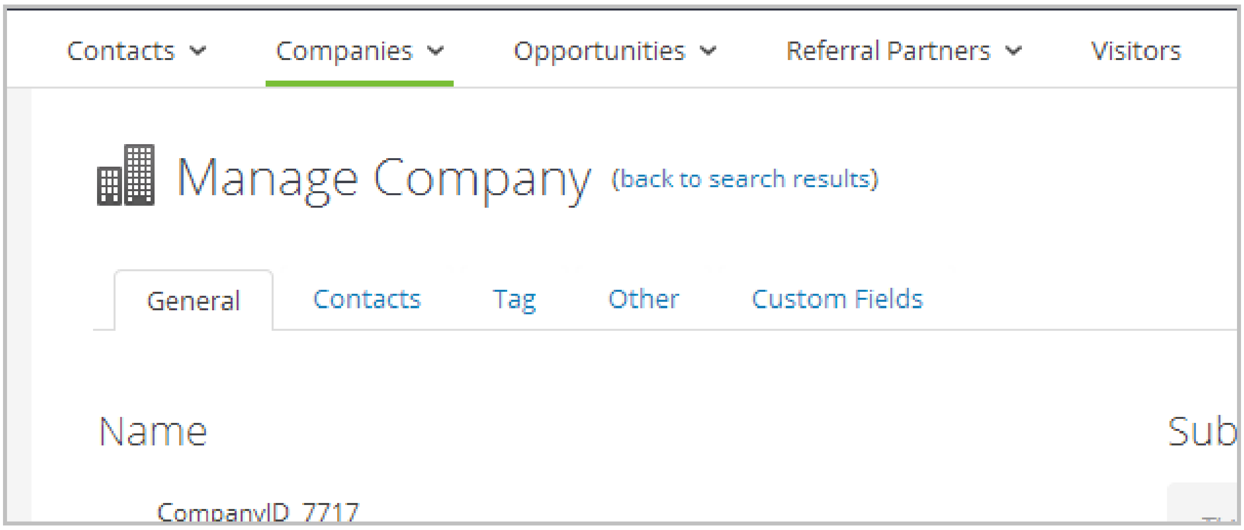
Last Modified on 07/23/2018 12:13 pm MST

Company records are most useful to B2B businesses that need to see a consolidated view of the people and activity related to a company. Company records link together multiple contact records to give you a snapshot view of an account in order to make it easier for you to communicate with the people working for that company. You can add a company name in any contact record. If you are not a B2B business or do not serve larger accounts, you may not need to create company records. Although you can get a consolidated view of account activity through a company record, all of the communications triggered through Infusionsoft are attached to contact records. You are always communicating with specific individuals within a company.

The company record, like the contact record, is divided into two tabbed sections:

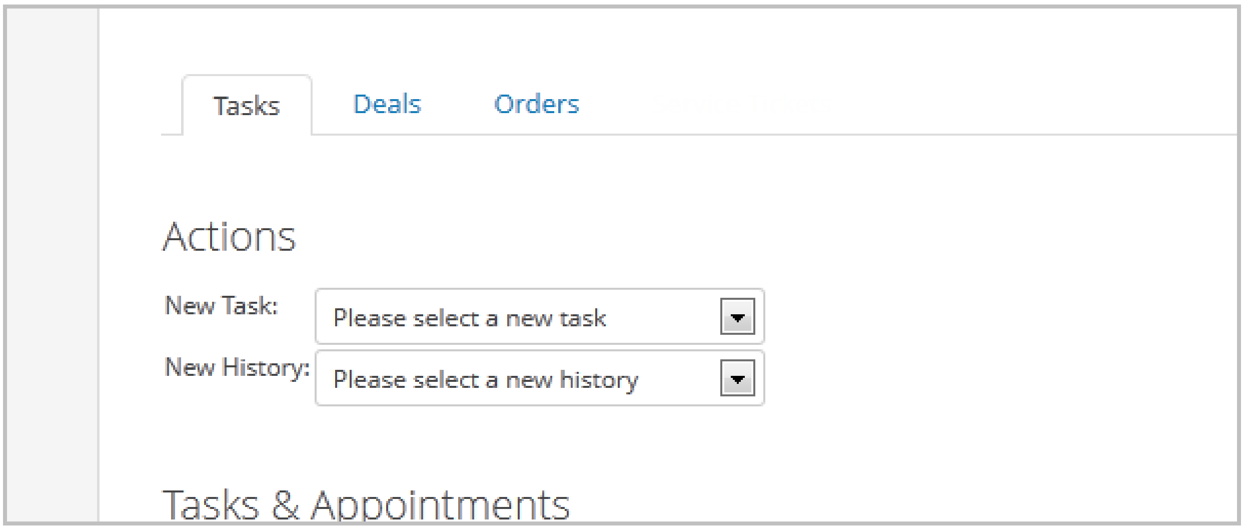
Top Row of Tabs

The top row of tabs stores company contact information, financial summaries, contacts, tags, notes, and (if applicable) custom fields.



Bottom Row of Tabs

The bottom row of tabs store a consolidated history of tasks, appointments, and notes for the people linked to the company record. It also shows all of the opportunities and orders attached to these contacts.



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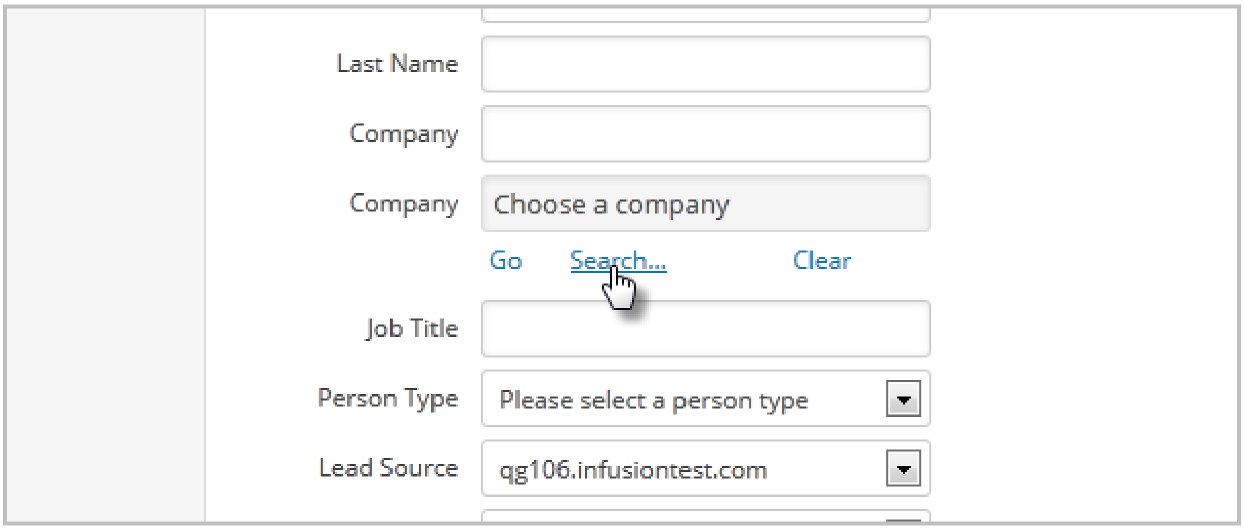
Assign A Contact To A Company

Last Modified on 07/23/2018 12:14 pm MST

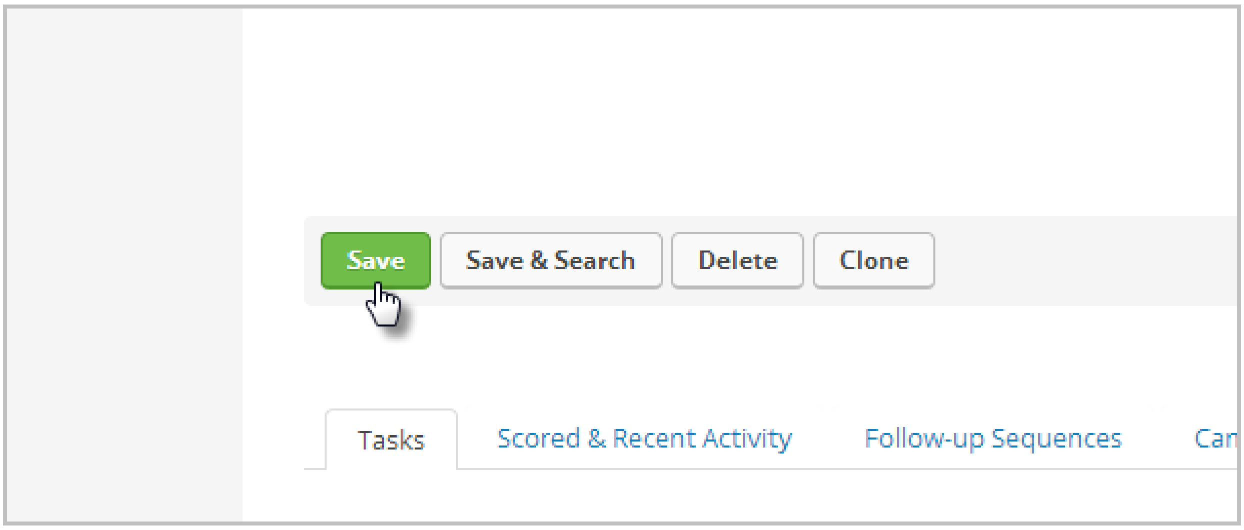
Assign a Contact to a Company From a *Contact* Record

1. Open the contact record.
2. Click on **Search** to choose an existing company.



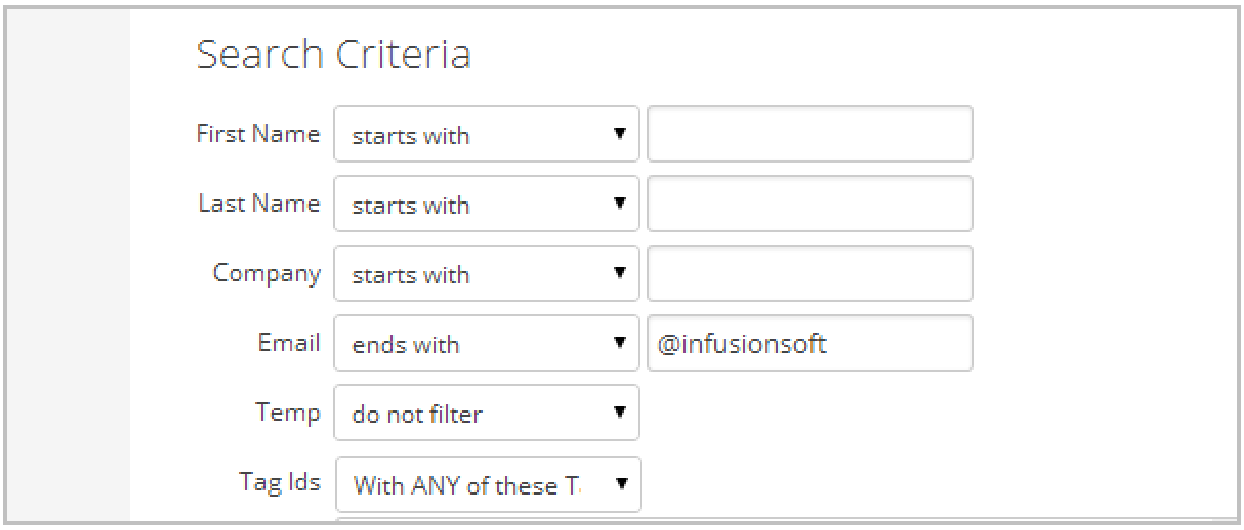
3. Click the **Select** link next to the company that the contact should be assigned to. (Using the search capabilities may make it easier to find the company. Type all or part of the company name and click Search.)

4. Click on the **Save** button to apply the update.



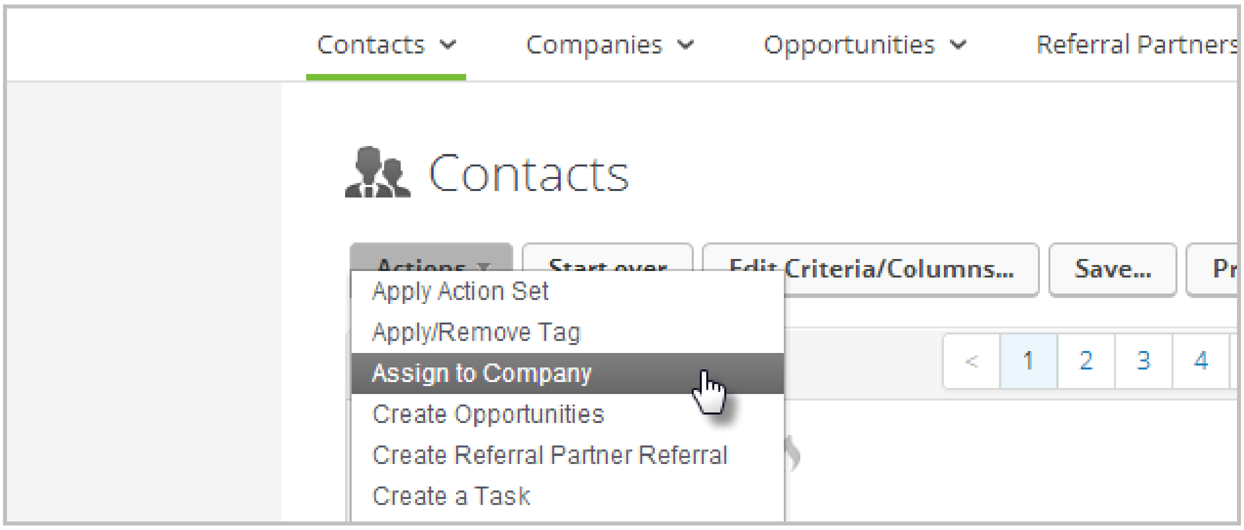
Assign a Contact to a Company From a *Company* Record

1. Do a contact search from CRM > Contacts by entering the search criteria (company name, email address, etc.) for the contacts that should be assigned to a company.

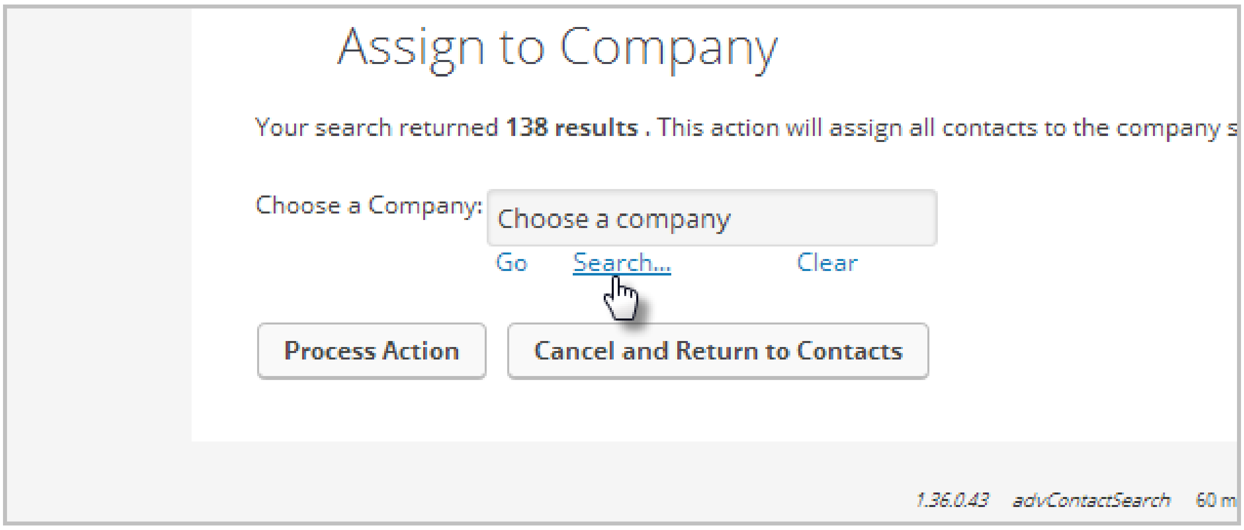


2. Review the list and mark the checkboxes for the contacts that should be assigned to the company.

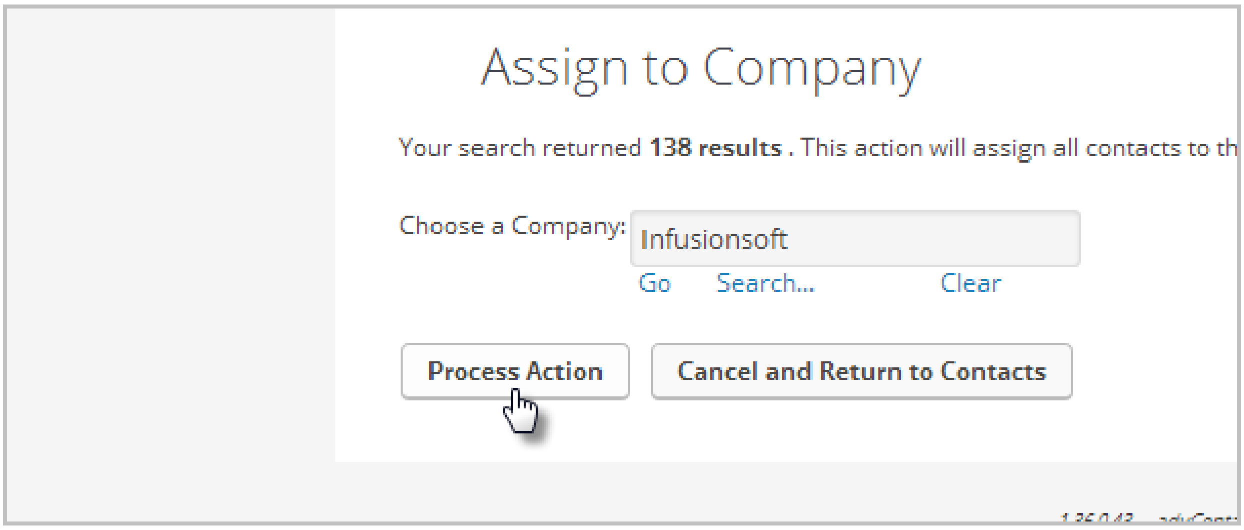
3. Click on the **Actions** button and select **Assign to Company**.



4. Click on **Search** to choose an existing company.



5. Click on the **Process Action** button.



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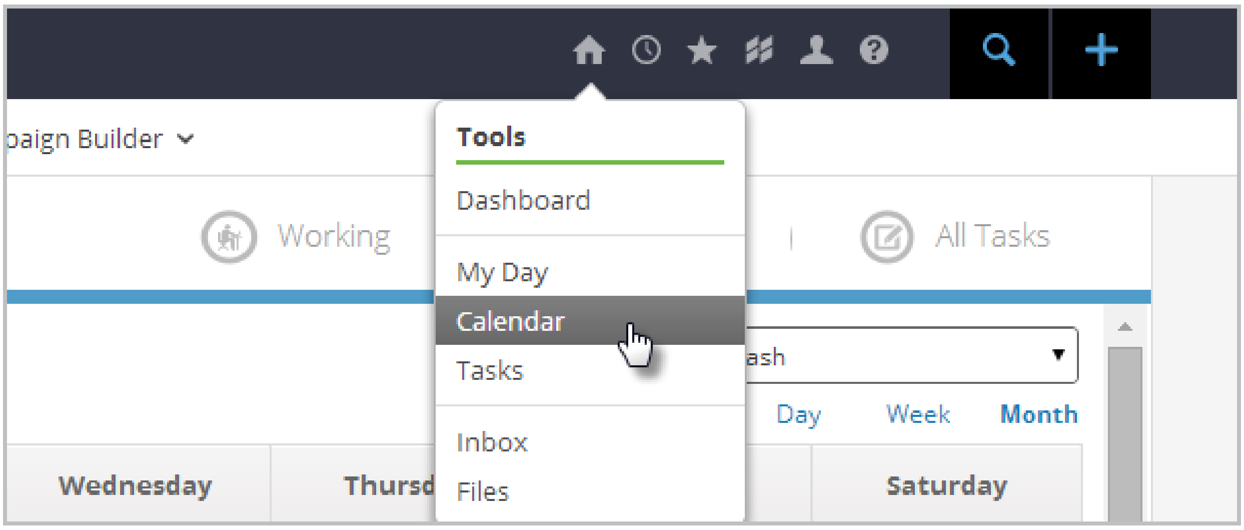
Calendar

Last Modified on 07/23/2018 1:08 pm MST

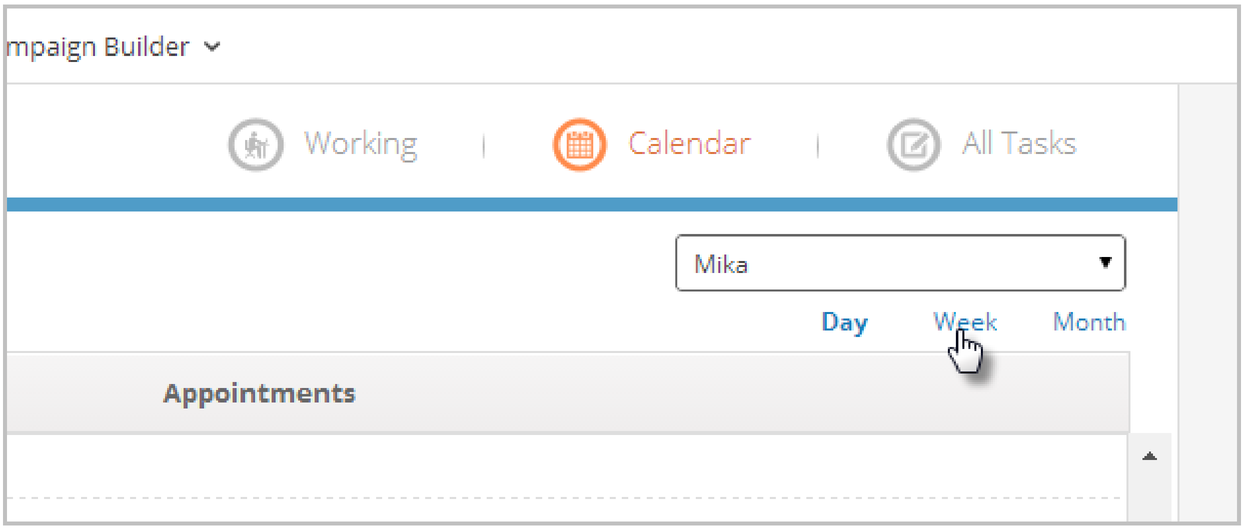
Each Infusionsoft user can track their tasks and appointments through Infusionsoft. These are individual calendars, not a group calendar. You can allow users to view each others calendars and tasks by editing their user permissions. Infusionsoft may also automatically assign tasks or appointments as part of your automated follow-up strategies. You can create tasks and appointments from the calendar or through an individual contact record. To sync your Outlook or Gmail calendar, take a look at the Infusionsoft marketplace for the Infusionsoft Sync for Outlook and Gmail products.

1. Click on **Home** in the user toolbar and select **Calendar**

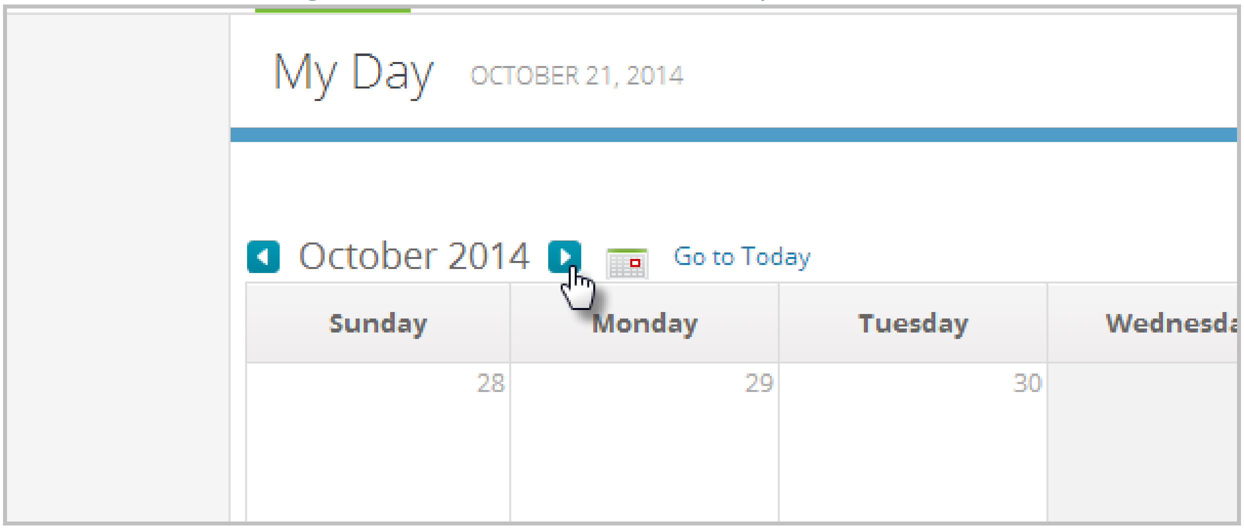


2. Your calendar will be displayed by default. Select a user from the drop-down to view another user's calendar (if your user permissions allow.) Task will show up on the calendar and on the task list. Click on the Task icon to view the task list and add new tasks.

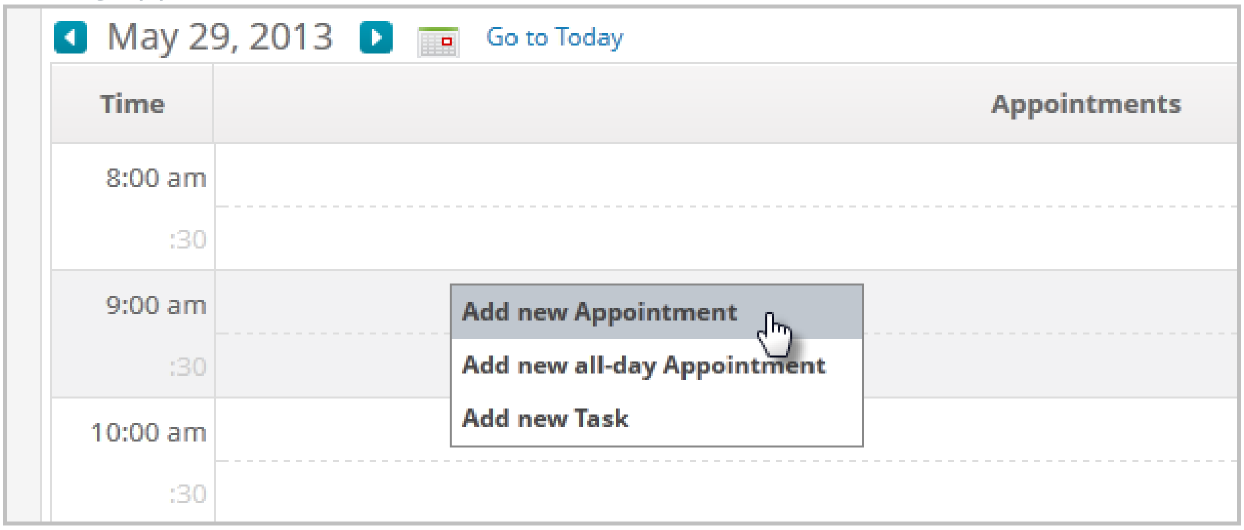
3. Click on **Day**, **Week**, or **Month** to change the calendar view.



4. Use the tools to navigate the calendar or select a specific calendar date.



5. Click on a time slot on the calendar to add a new appointment or task or click on an existing appointment or task to edit it.



- Select one of the create appointment options to block out a specific period of time and/or to record a firm commitment. Appointments have a start AND end date and time. They are assumed completed based on the end date / time.

- Create a task to create a "to do" item on your calendar. You can assign a date and time, but cannot block out a window of time on your calendar for a task. Tasks have a start date, but the end date is not recorded until the task is marked as completed.

6. Fill in the task or appointment details.
    - **Linked Information**: Click on the **select a different contact** link to find a contact record and link it to the task or appointment.
    - **Appointment / Task Information**: Enter a short description (this will show up in your task or appointment list), start and end date / time, creation notes, and select the responsible user from the dropdown. The appointment or task will show up on that user's calendar. You can only assign one responsible user to each task or appointment.
    - **Advanced Info**: Assign an action type and priority. The priority helps you identify which tasks are most critical so you can work on them first.
    - **Notifications**: Click on one or more users to send them an email notification when this task is created. Hold down the **Ctrl** key on your keyboard to select more than one user. Set a pop-up reminder to trigger before the appointment. The pop-up reminder displays when the user is logged into Infusionsoft. It is not an email notification.

7. Click the **Save** button to save the task or appointment to the calendar and/or task list.

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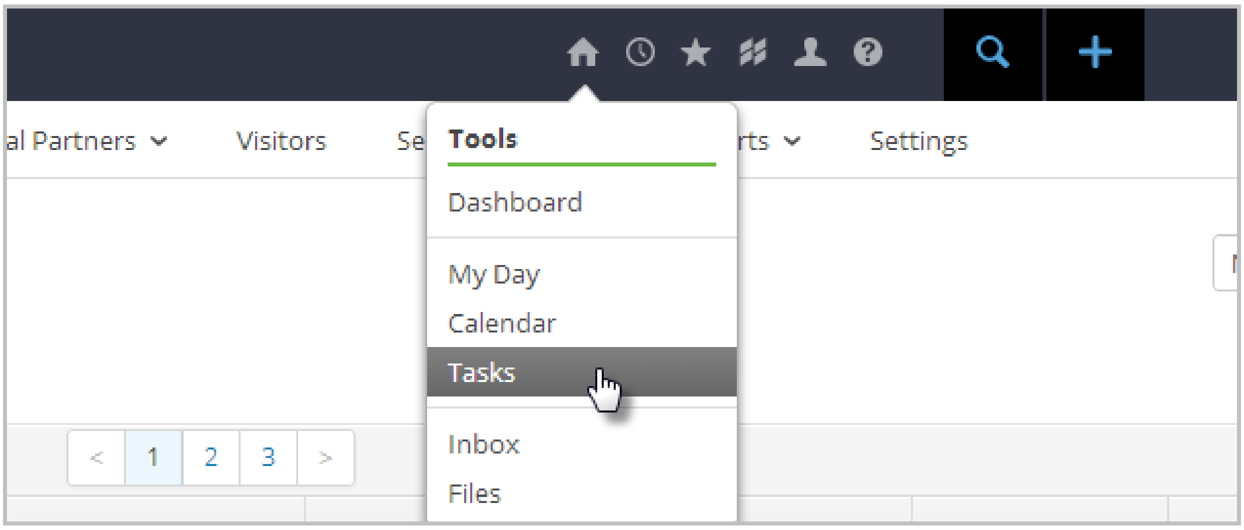
Manage Tasks

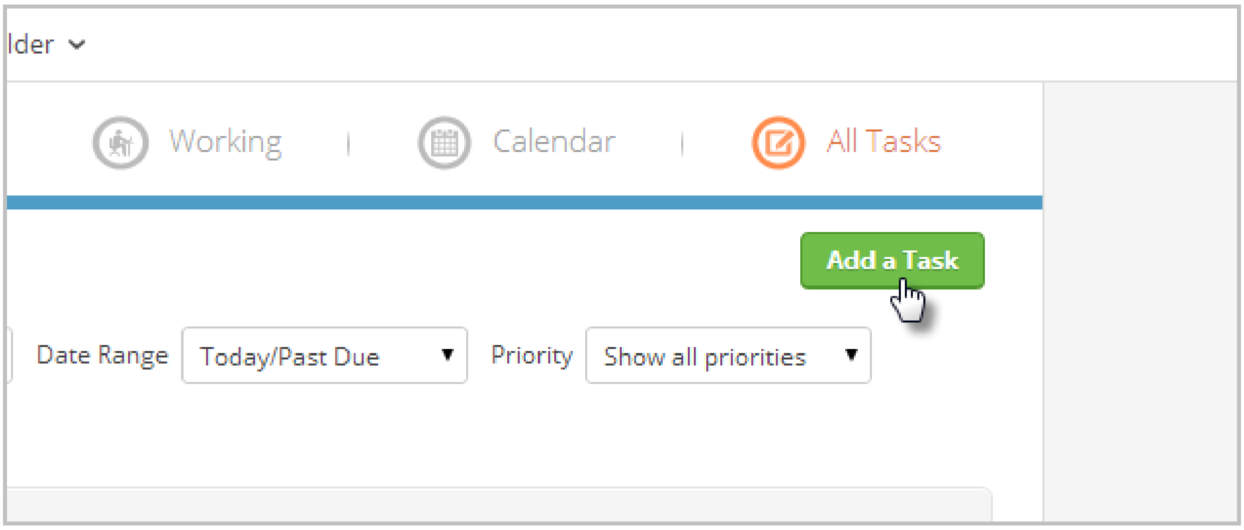
Last Modified on 10/03/2018 5:01 pm MST

Each Infusionsoft user can track their tasks and appointments through Infusionsoft. You can allow users to view each others calendars and tasks by editing their user permissions . Infusionsoft may also automatically assign tasks or appointments as part of your campaign sequences . You can create tasks and appointments from the calendar or through an individual contact record . To sync your Outlook or Gmail calendar, take a look at the Infusionsoft marketplace for the Infusionsoft Sync for Outlook and Gmail products.

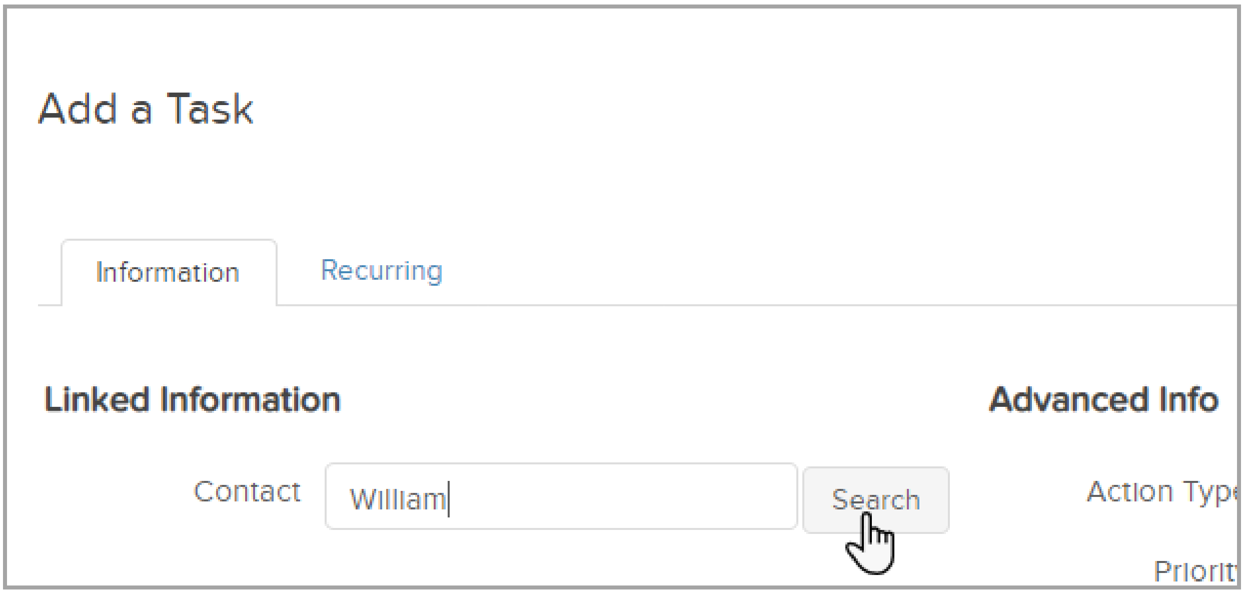
1. Click on the **Home** icon in the user toolbar and select **Tasks**.



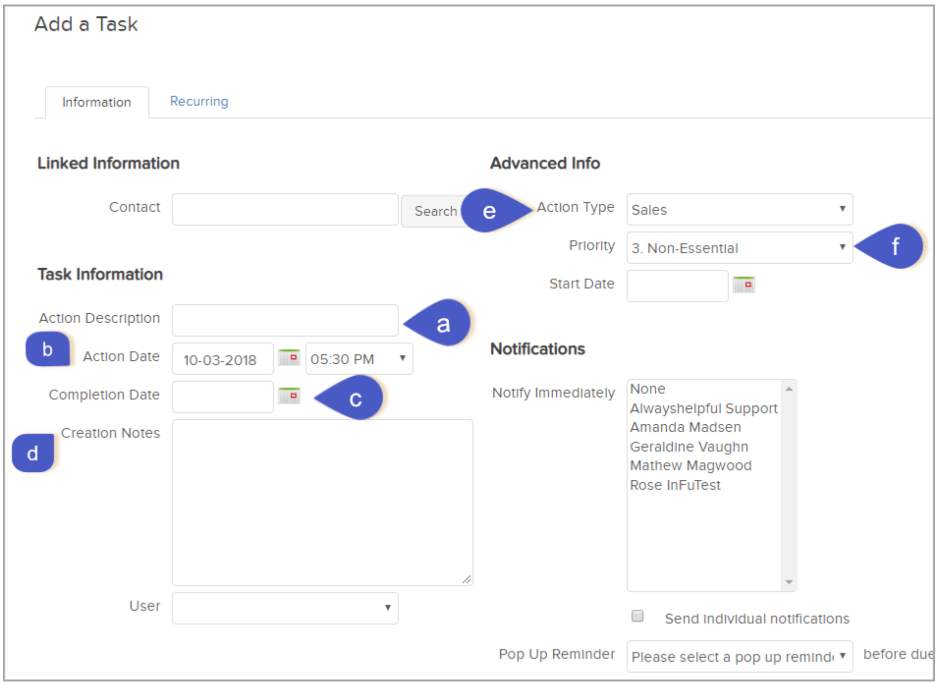
2. Click the **Add Task** button to create a new task. You can also create a task while viewing a contact record or while viewing a list of contacts in interactive view.



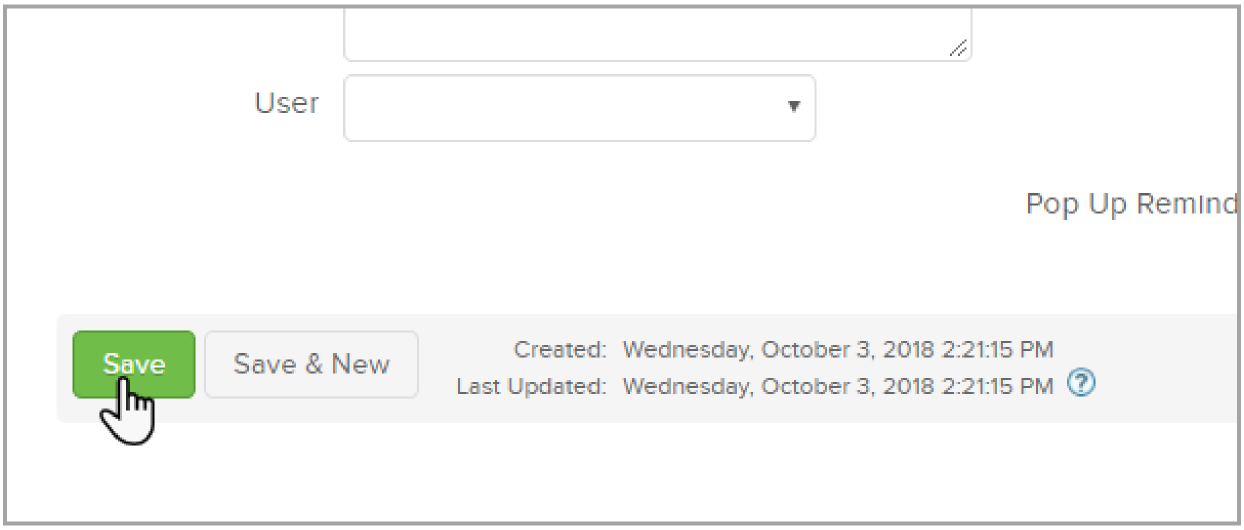
3. Start typing the first name of a contact and click the **Search** button to find the contact record.



4. Fill-in the task details:
   a. **Action Description:** This is the task title that shows up in your task list.
   b. **Action Date:** This is the date the task is due. You can update this date if you are not able to complete the task on the due date or keep it pending as an overdue task.
   c. **Completion Date:** Use the calendar icon to select a completion date when you finish the task. Setting a completion date will remove the task from your task list and archive it in the contact record history.
   d. **Creation Notes:** These notes describe the task in detail. You can also use this space to record notes about the outcome of the task.
   e. **Priority:** Is used to set the urgency level of the task.
   f. **Action Type:** This is the Task Category. You an use the Action Type when running the "Call History Summary report" and "Call Log Report" located under CRM > Reports > Sales. Also when running the "Task Note Report" located under Admin > Reports



5. Click the **Save** button to save your changes.


User
Pop Up Remind
Save
Save & New
Created: Wednesday, October 3, 2018 2:21:15 PM
Last Updated: Wednesday, October 3, 2018 2:21:15 PM

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Manage Tasks And Appointments with My Day

Last Modified on 07/23/2018 1:09 pm MST

The My Day page consolidates tasks and appointments onto one page. With My Day, you can focus on one area of Infusionsoft to perform your daily activities instead of jumping around to various pages in Infusionsoft. The left panel contains tasks and appointments. The large panel to the right shows you the details of the tasks and appointments you select from the left.

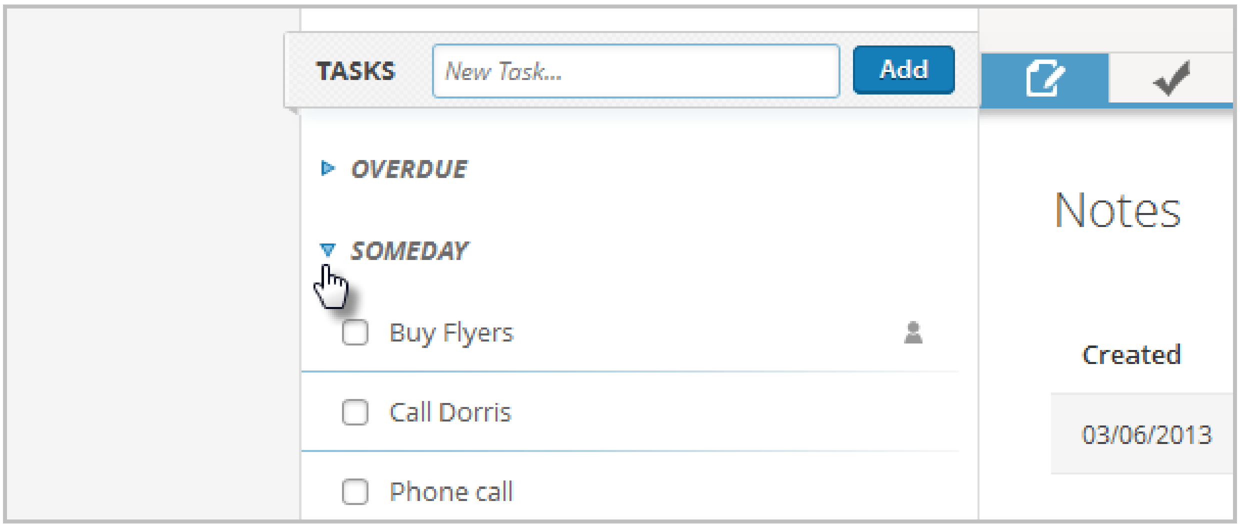
Manage Tasks

The Task Panel shows up to 250 tasks assigned to you. Tasks are ordered by the due date, then priority, and organized into one of these four groups:

- **Overdue** - Tasks that are past due
- **Today** - Tasks that are due today

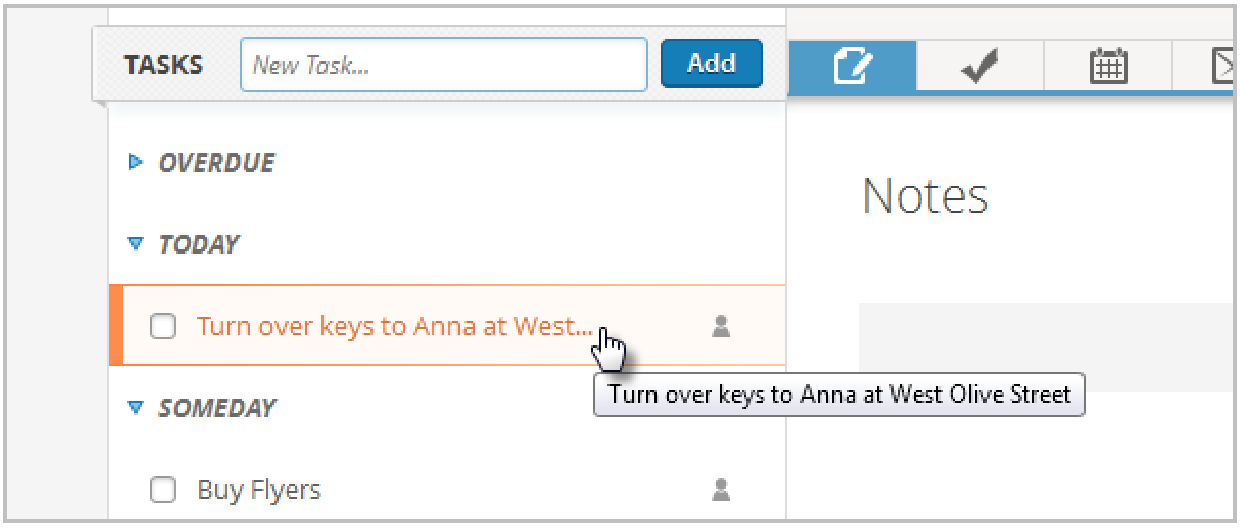
- **Tomorrow** - Tasks that are due tomorrow
- **Someday** - Tasks that have not been assigned a due date

Each of these groups can be collapsed or expanded by clicking on the group name.

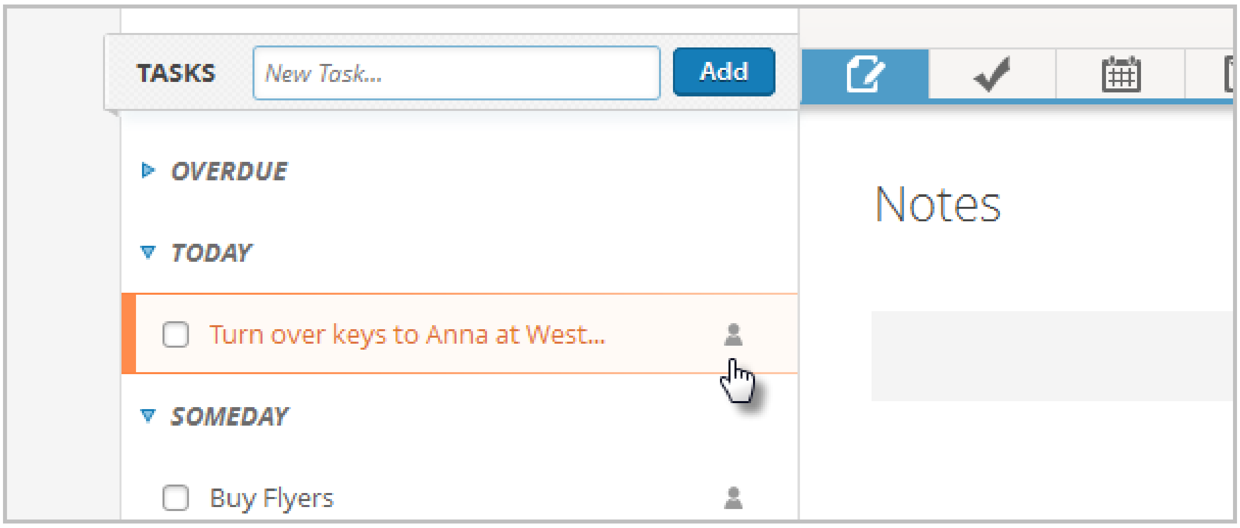


Please Note! This state is not saved. When you leave My Day and come back, the groups will reset to all groups expanded. If there are no tasks in the group, the group name will be hidden. If there are over 250 tasks in your tasks panel, all other tasks will transfer to the All Tasks view.You will be alerted that you have exceeded the 250 display limit. You may click the All Tasks button to see these tasks.

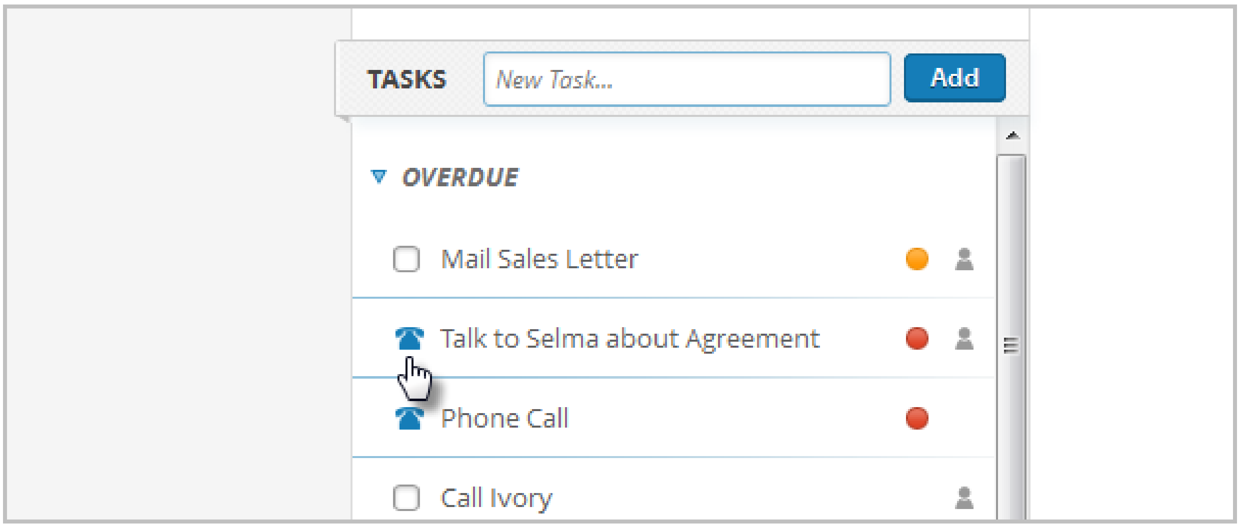
- **Task Title** - If your task title is too long, just hover over the task to reveal the full title.



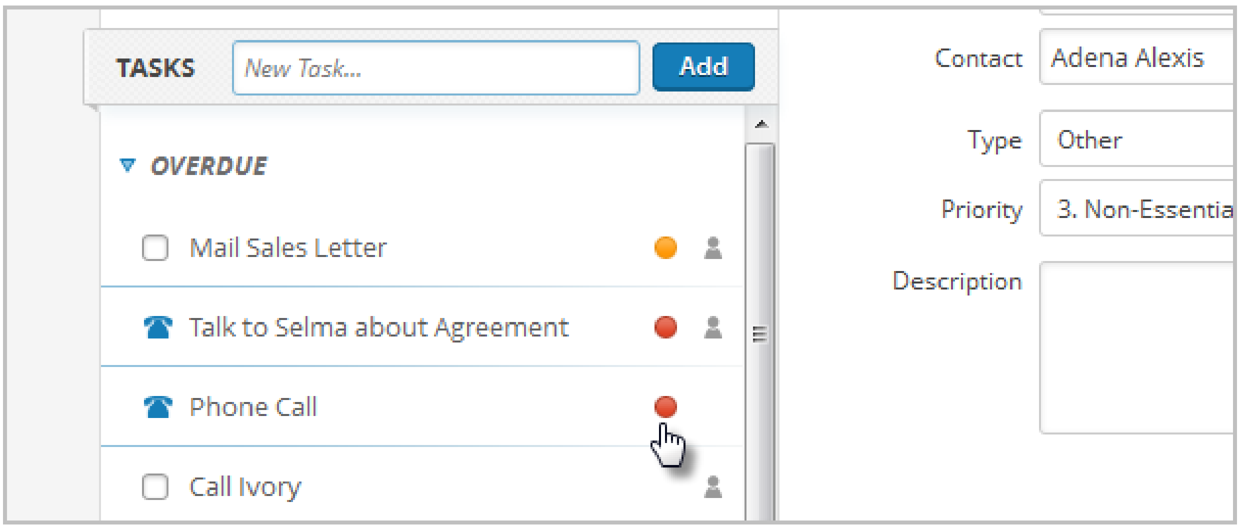
- **Due Date** - The Due Date represents the date the task is due
- **Contact Association** - If the task is associated with a contact record, a person icon will appear on the task



- **Task Type** - Can be Email, Call, Appointment, Letter or Other.

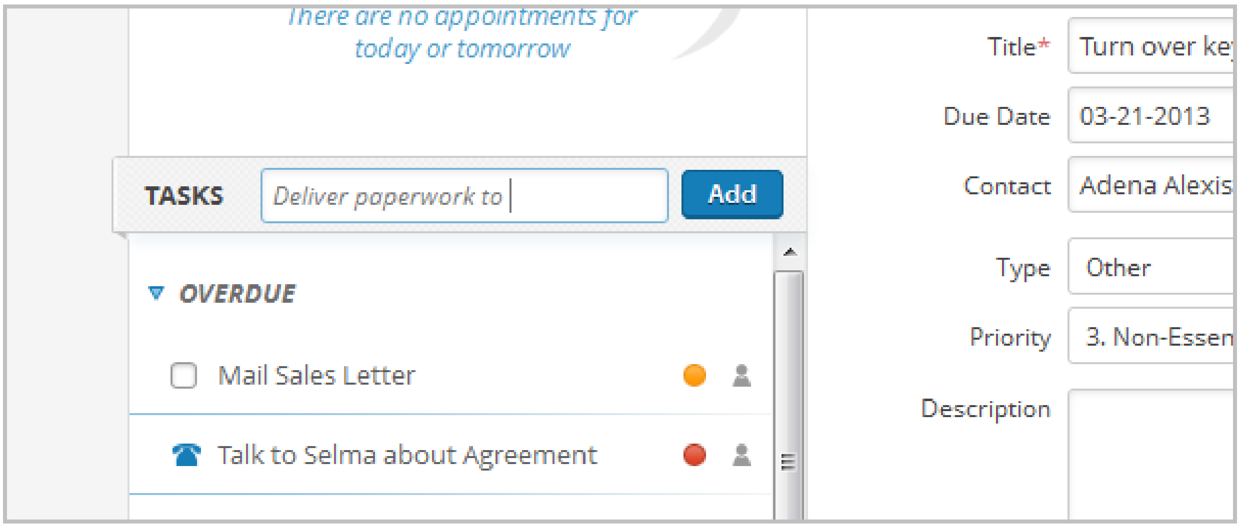


- **Priority Icon** - The priority icon only displays if you specify a priority on a task. Priorities have been migrated to the new task data model, and are represented as colored dots that represent the severity of the priority. Red = Critical, Orange = Essential and No Icon = Non-Essential.



Adding a Task

To add a task, type the title of the task into the *New Task* field and hit **Enter** on your keyboard (or click the **Add** button on the page.) Newly created tasks appear below the *New Task* field and above the task groups. These new tasks include the task title and a delete icon (allowing you to quickly remove a new task.)

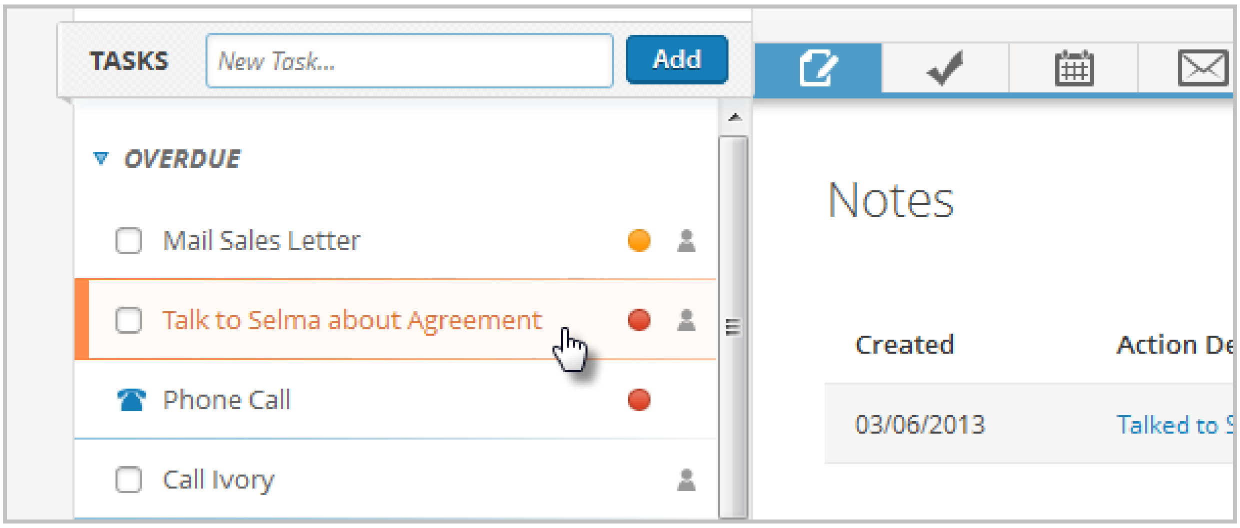


When the task is created, it is automatically selected and displayed in your *Working View*. Here, additional details can be added to the task:

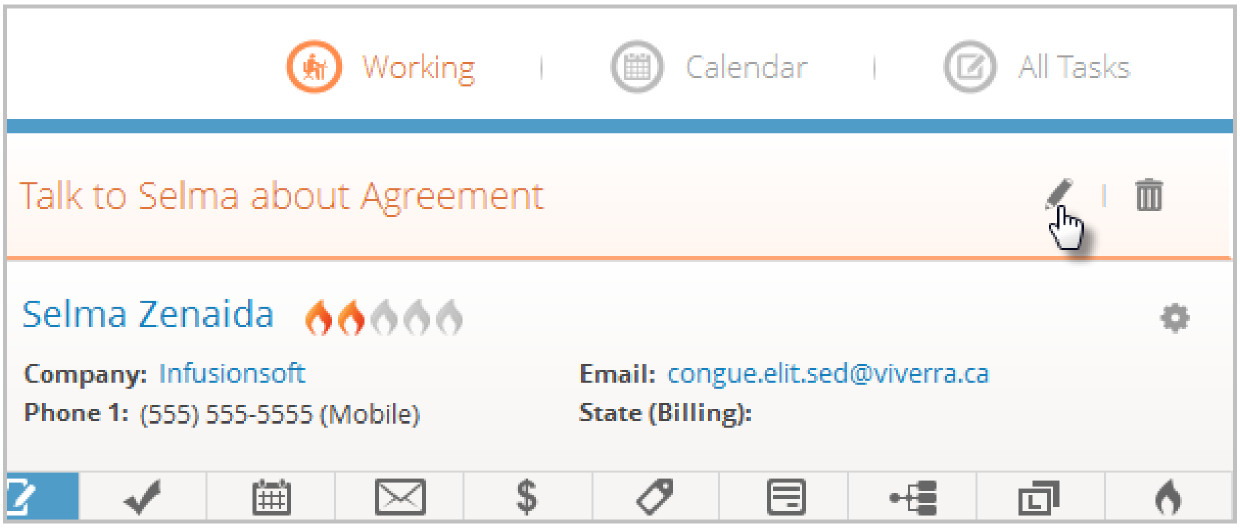
- Due Date
- Contact
- Task Type
- Priority
- Description

Edit a Task

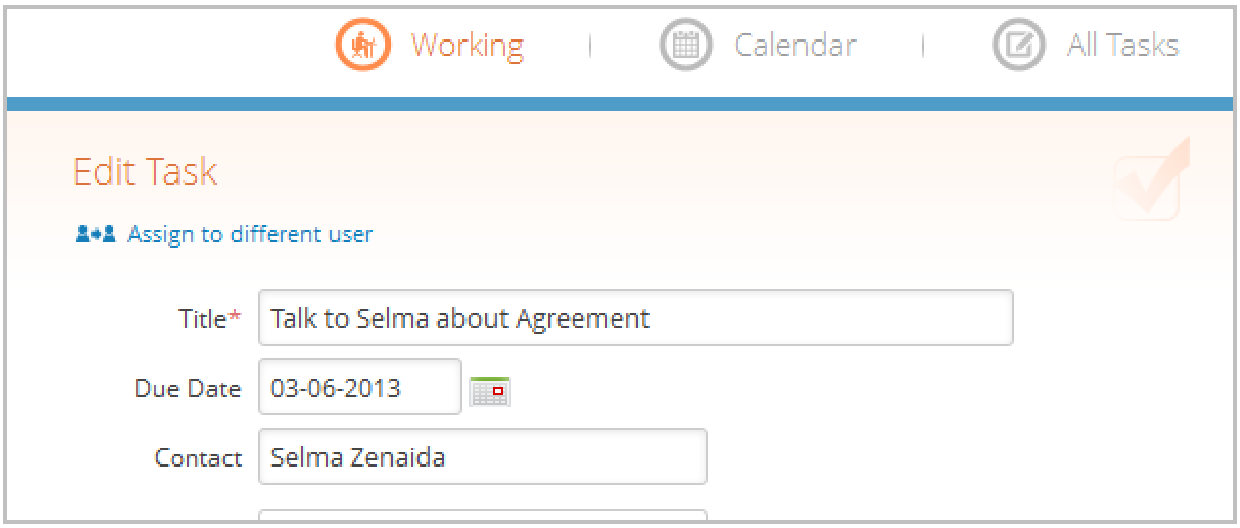
1. To edit a task in the working panel, click on a task in the left panel to select it.



2. The task details will appear in the right hand panel, along with icons for **Edit** and **Delete**. Click the **Edit** icon in the right hand panel to bring up the edit task screen.



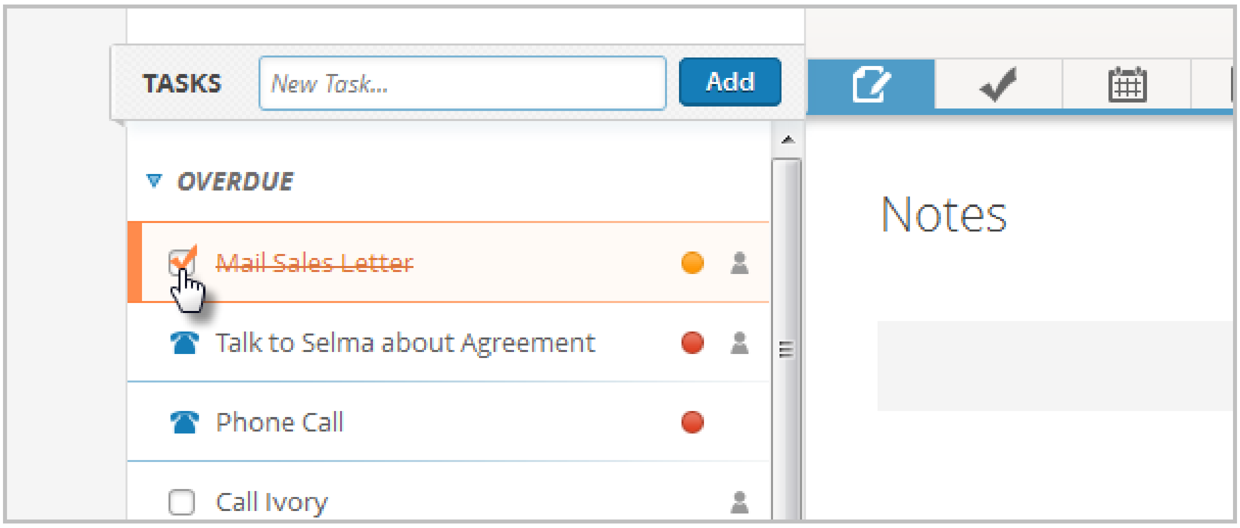
3. The edit screen is the same as the creation screen.



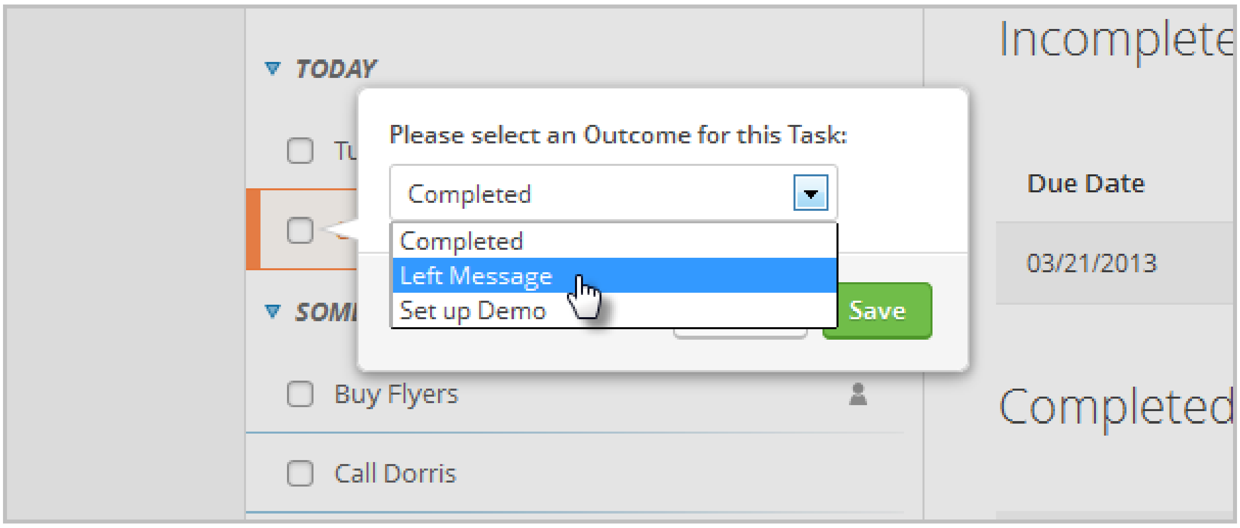
Once a task has been edited and saved, the task remains selected in the list and the right panel displays the task details. If the due date has been changed, and the task no longer falls into the display criteria for the *working* tab, then the right panel will return to the default *blank* view.

Completing a Task

To complete a task from the *Working* tab, simply click on the check mark next to the task title. The task will be struck through. The completed task will be removed from the *Working* tab and archived in the Task Note Report under **Admin > Reports**.



For tasks that have legacy completion scenarios (outcomes) that trigger automation, a modal with scenario options is presented to you when the checkbox is clicked. You must choose a scenario and click **Save** to complete the task.



Once a task has been completed, the task details are presented in a *read only* state, and cannot be deleted or edited. If there is a contact associated with the task, and the contact record is showing, you will still be able to perform actions on the business card's action pane.

Manage Appointments

The Appointments panel on the My Day page displays your appointments for today and tomorrow. Each appointment includes:

- **Appointment Title** (Character limited to one line. If the title needs to extend beyond one line, it is shortened with ellipses. On mouse-over, a tool-tip will appear with the entire appointment title.)
- **Start Time & End Time**
- **Location** (only displays if you specify the location.)
- **Attendee** (only one attendee can be attached to an appointment.)

The Appointment panel allows up to three appointments to be viewable at one time. If there are more than three appointments between today and tomorrow, a scroll bar will appear, allowing you to scroll in the appointments panel. There is no limit to the number of appointments that can display in this panel.

Please Note

The panel's height is responsive based on your resolution.

- Height = 768 px or lower: One Appointment will appear at a time
- Height = 800 px: Two Appointments will appear at a time
- Height = 960 px or higher: Three Appointments will appear at a time

Appointments consist of the following elements:

- **Title** - The Title is required
- **Contact** (optional) - If the appointment is tied to a contact record, start typing the name of the person and choose the person from the drop-down list.
- **Location** (optional) - Enter in the name of the location of the appointment.
- **Start Date/Time**
- **End Date/Time**
- **Description** - Optional details that you can enter.

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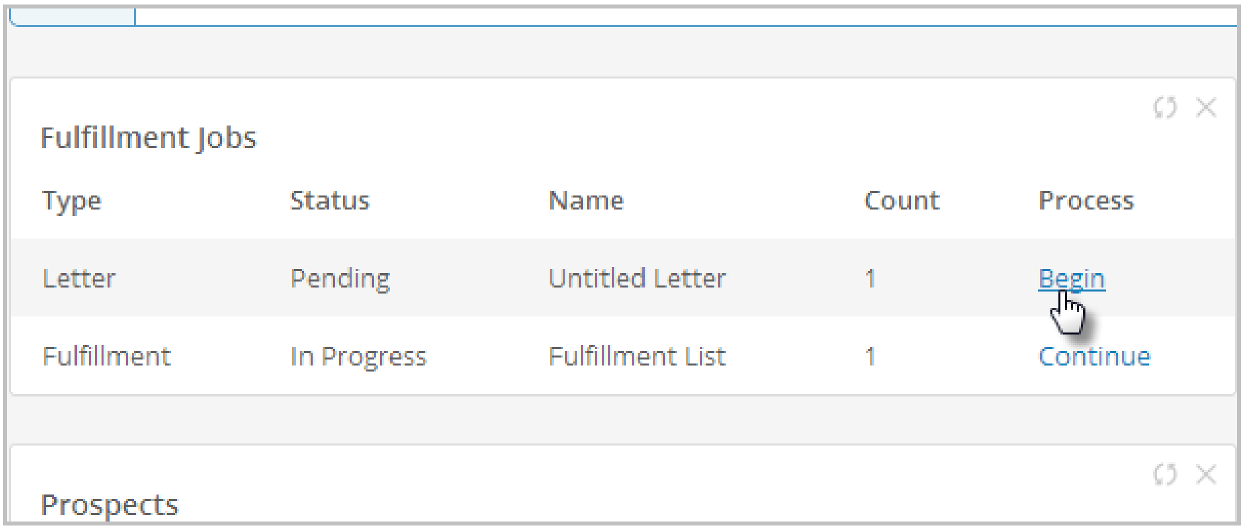
Process A Letter Fulfillment Job

Last Modified on 07/23/2018 1:10 pm MST

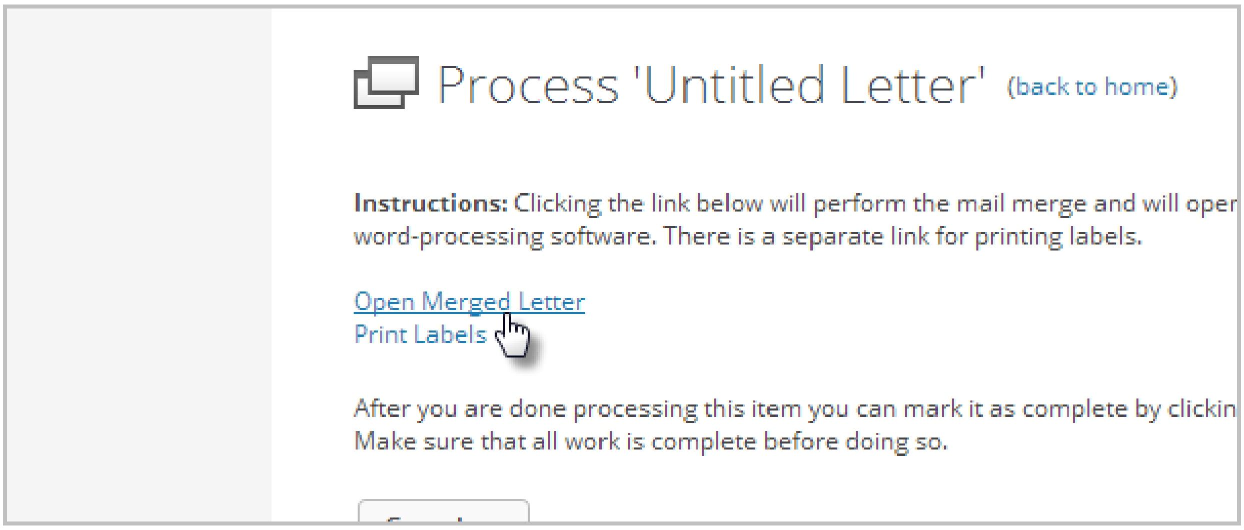
A letter fulfillment job is created to make it easy for you to process a mail merge and print labels for a list of contacts. The job is created when the letter template is used in a campaign. It includes a link to a letter template that auto-merges contact information from the contact records so that you can batch print the letter for those people. The letter jobs are automatically displayed in the fulfillment job widget on your Dashboard.

Each job will accumulate (or queue up) people until you begin processing. After you begin processing a specific job, the system will not add any new people to it. It will, instead, create a new job the next time the template is triggered. A letter job displays the status, the name, and count (number of people queued) as well as a link to view and process the job.

1. Click on **Begin** to view and begin processing the job. Clicking on this link updates the job status to *processing* and the system will stop adding people to the job.

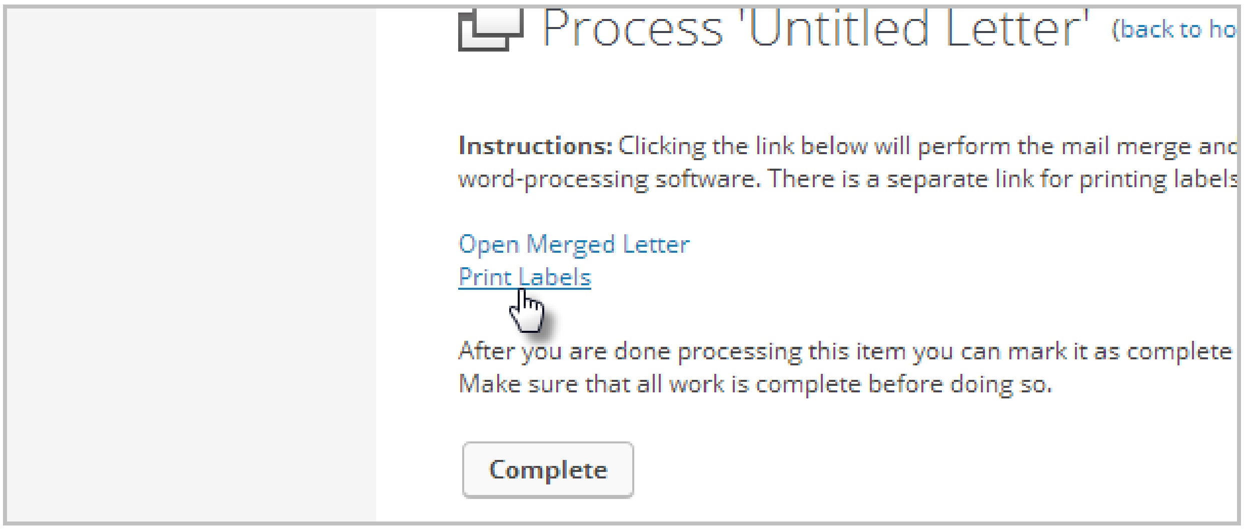


2. Click on the **Open Merged Letter** link to open the letter in Microsoft Word and generate the mail merge. If prompted, click on **Open** or **Open in Word**. The system will customize the letter for each person in the queue so that you can print them all at once.



3. Print the letter.

4. Some letter jobs may include a link to print labels, or the job have been created for the sole purpose of generating address labels. Click on the **Print Labels** link.



5. Review the label setup
   - **Merge Fields**: The merge fields pull information from each contact record. Click on open merge window to add new merge fields to the label. Remove any unnecessary merge fields or add default values for fields where a blank field may be common.
   - **Label Type**: Choose an Avery label type and the position of the first available label on your sheet.

6. Click on **Generate Labels** to open the labels in Microsoft Word. If prompted, click on Open or Open in Word.

7. Print the labels

8. When you're finished with this job, click the **Complete** button to remove the job from your dashboard. The job can remain *pending* until it is fully processed. Do not click complete until you have truly finished the job.

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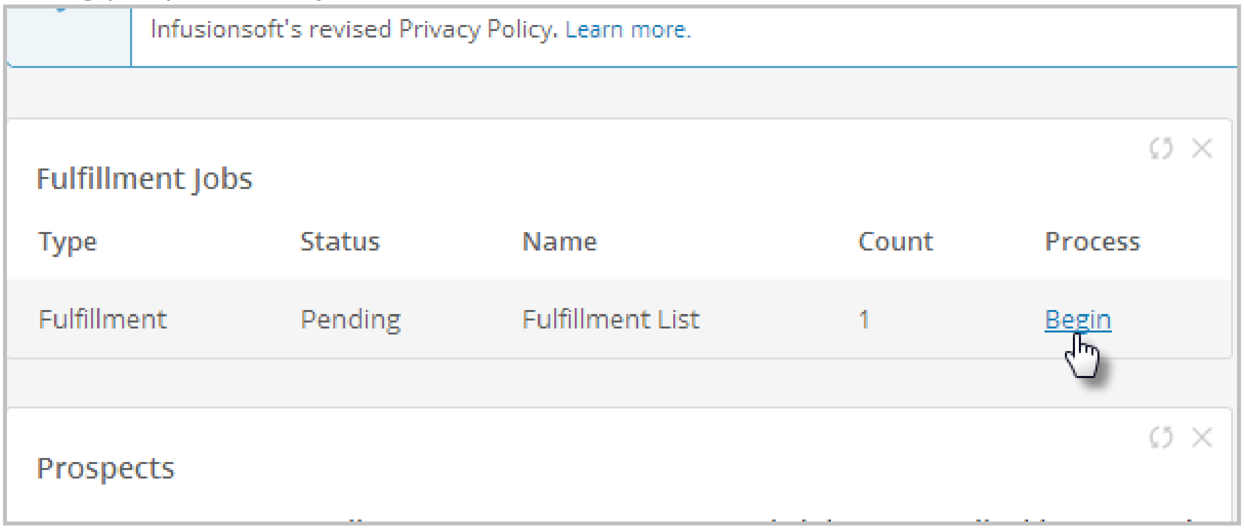
Process A Queued Fulfillment Job

Last Modified on 07/23/2018 1:10 pm MST

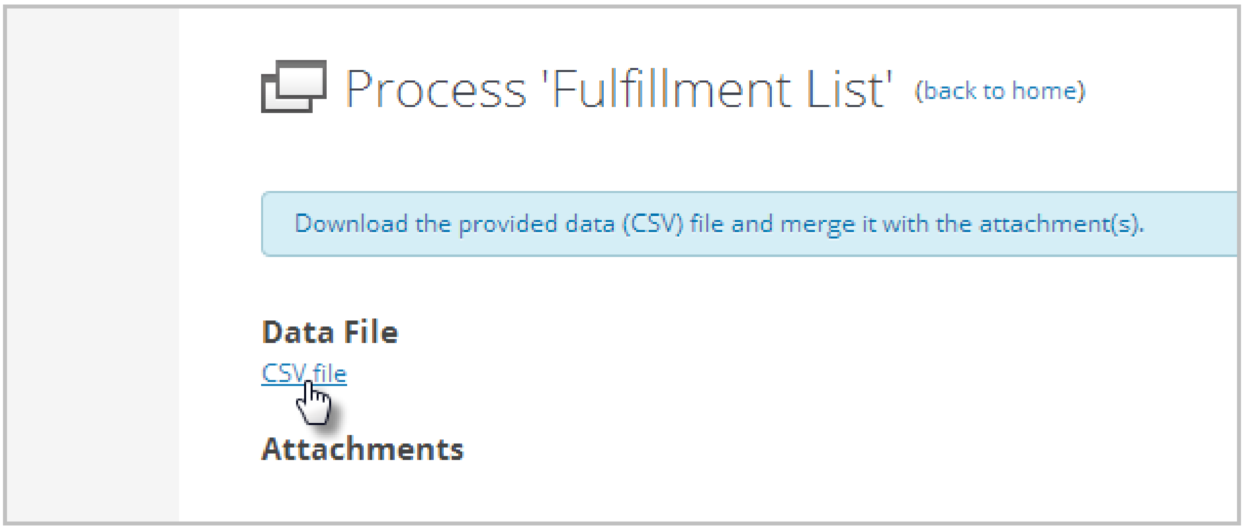
A queued fulfillment job is most often associated with mailing a gift, postcard, kit, free report, etc. The job is created when a queued fulfillment list used in a campaign sequence in the campaign builder. It includes a list of people due to receive the mailing, and may also include documents to reference or print. The jobs are displayed in the fulfillment job widget on your dashboard.

Each job will accumulate (or queue up) people until you begin processing. After you begin processing a specific job, the system will not add any new people to it. It will, instead, create a new job the next time the template is triggered in the campaign sequence. A queued fulfillment list job displays the status, name, and count (number of people queued) as well as a link to view and process the job.

1. Click on **Begin** beside a queued fulfillment list job to view and begin processing the job. Clicking on this link updates the job status to *processing* and the system will stop adding people to the job.

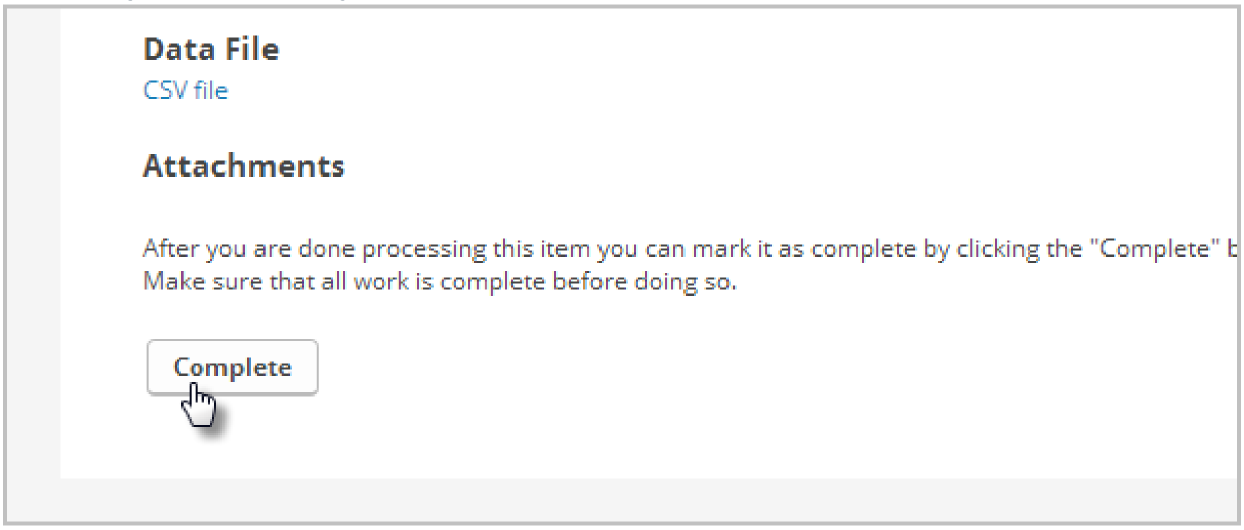


2. Click on the *csv* File link to download the spreadsheet.



3. (Optional) If there are additional attachments, click on the other document links to download or view the documents (i.e. postcard jpg, free report, etc.)

4. Click on the **Complete** button to remove the job from the user home.
   The job can remain *pending* until it is fully processed. Do not click Complete until you have truly finished the job.



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Process An Order Fulfillment Job

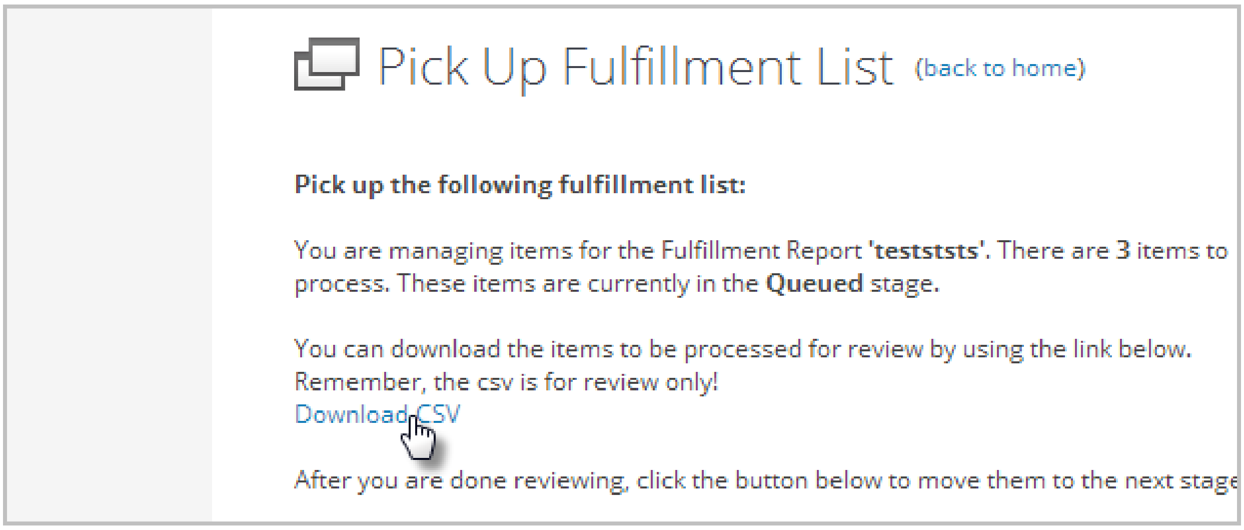
Last Modified on 07/23/2018 1:10 pm MST

An order fulfillment job (fulfillment report) is created when an order is placed that includes a product you ship to the customer. It includes a list of people, the product(s) ordered, and shipping information. The jobs are displayed in the fulfillment job widget on your dashboard.

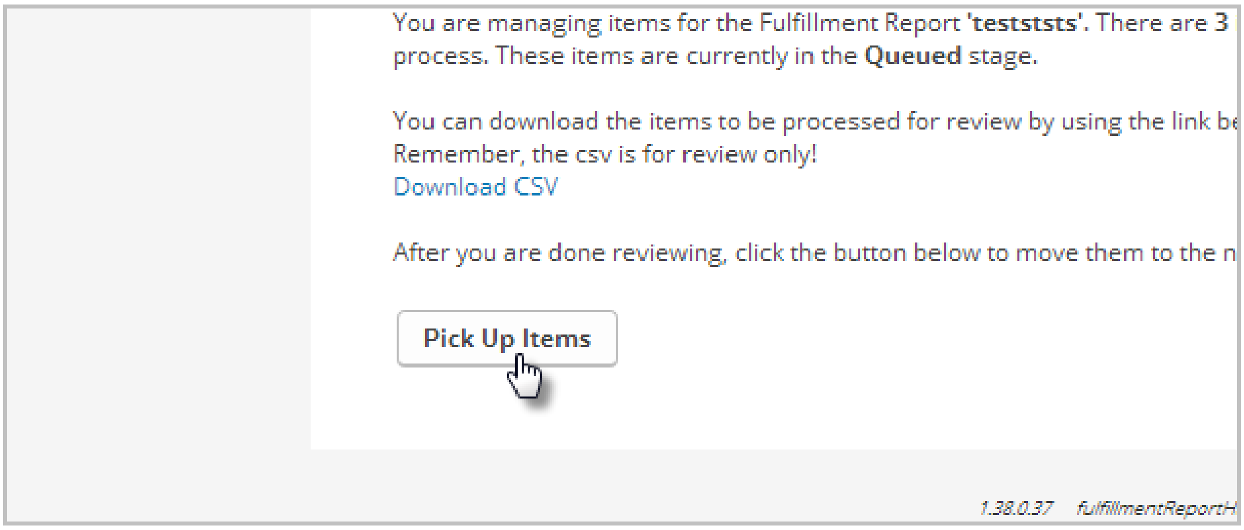
Each job will accumulate (or queue up) people until you begin processing. After you begin processing a specific job, the system will not add any new people to it. It will, instead, create a new job the next time an order goes through and the job is triggered. The fulfillment report creates a job that displays fulfillment status, report name, and count (number of people queued) as well as a link to view and process the job.

1. Click on the **Pick Up Items** link beside a fulfillment report job to view and begin processing the job. If you manage fulfillment jobs, you will approve jobs for other users.

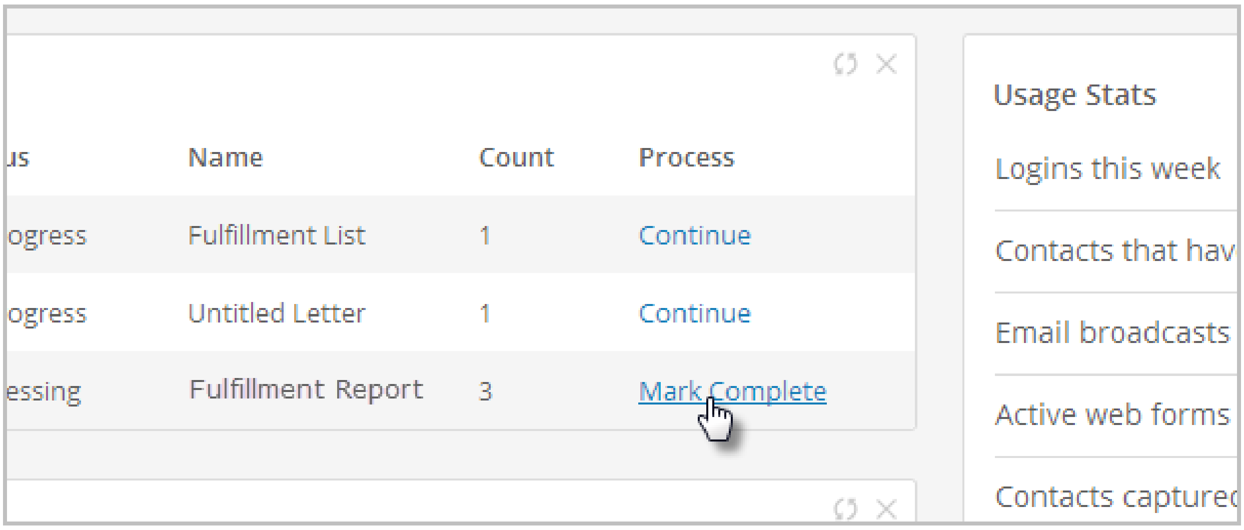
2. Click on the **Download CSV** link to view the list of orders associated with the job.



3. Click on the **Pick Up Items** button to confirm you are going to work on this job and to update the job status to *processing*.



4. Click the **Mark Complete** link in the fulfillment job widget to confirm you've finished the job. The job can remain *pending* until it is fully processed. Do not click Complete until you have truly finished the job.



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Campaign Builder Terminology

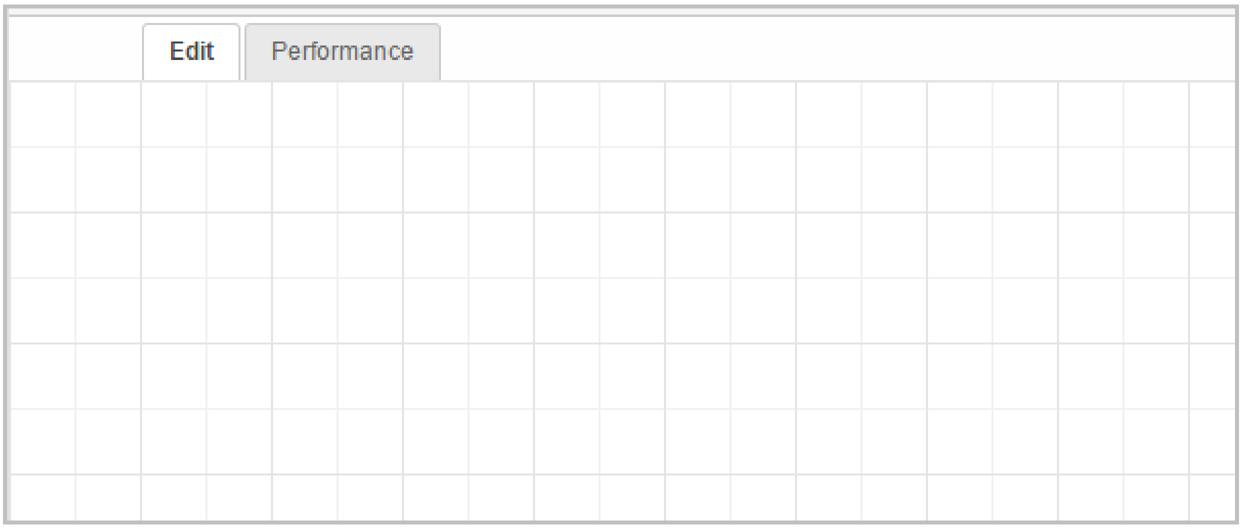
Last Modified on 10/02/2018 2:58 pm MST

The campaign builder is a visual, drag & drop interface that allows you to build a marketing and sales process from start to finish; including emails, landing page s and more. Your business may only require a single campaign to automate your entire marketing and sales automation strategy, or you may run many campaigns concurrently to support more complex automation needs.

This article simply defines some common terminology used throughout this guide.

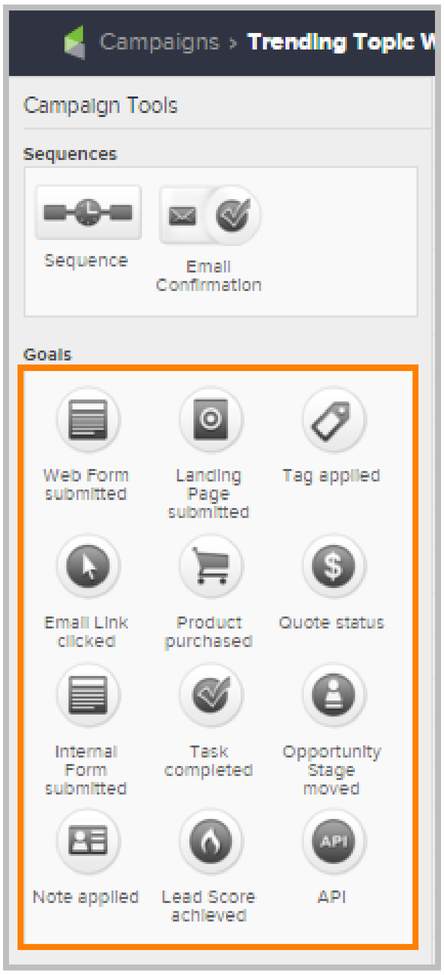
Campaign Canvas

The campaign canvas is simply your work area; it looks like graphing paper. You will drag objects from the campaign sidebar onto the canvas to create sales and marketing automation. If you are running out of room on the canvas, just right-click and drag your mouse. You have an infinite canvas to work with.



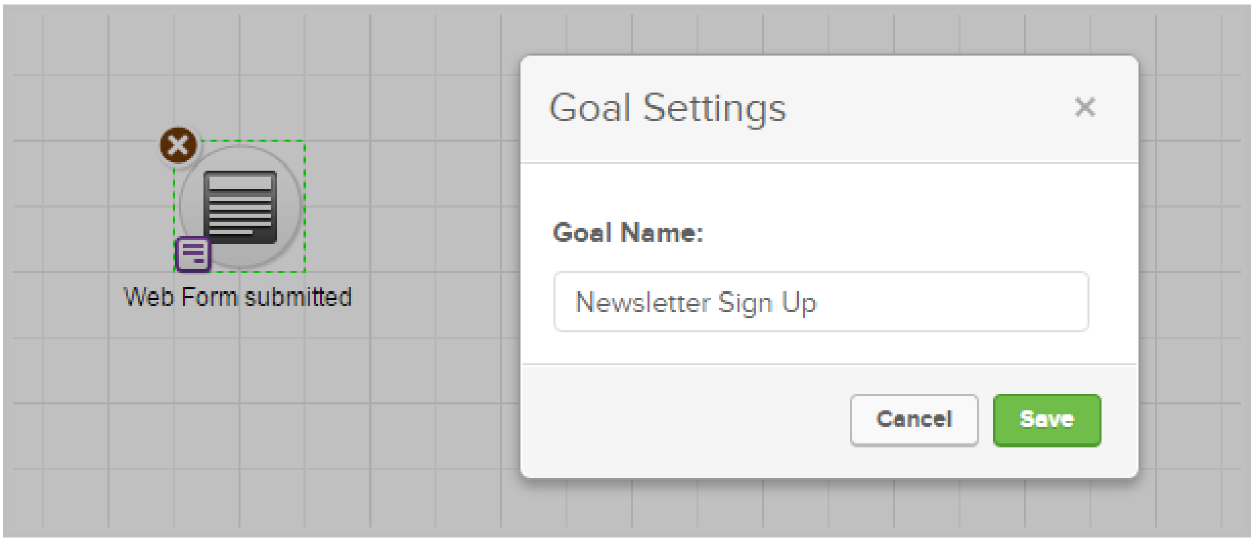
Goals

A goal represents a business objective that you are trying to achieve in your marketing strategy - like submitting a web form.



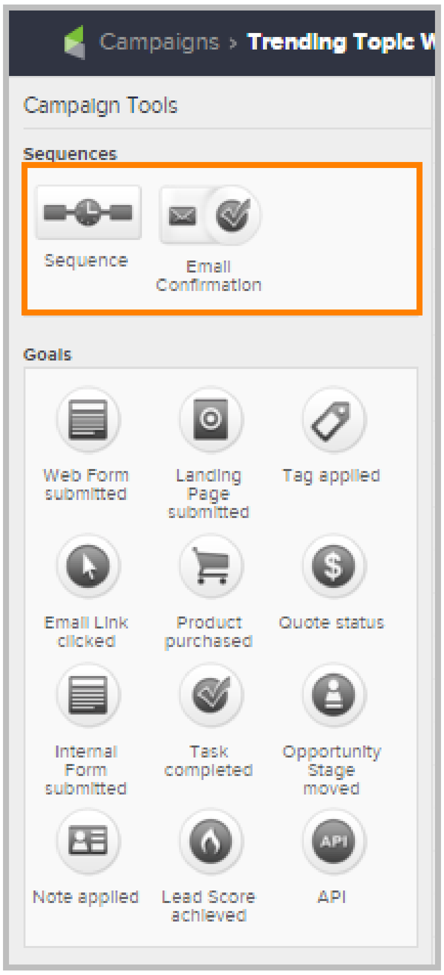
Naming a Goal

Once you drag a goal onto the canvas, you must name it. The name is for your internal use only - your audience will not see the name.



Campaign Sequences

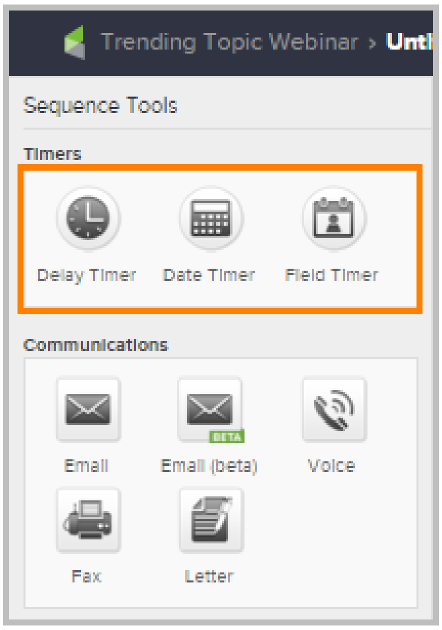
A campaign sequence is a scheduled series of communications and/or processes that are set in motion when a campaign goal is achieved. Sequences deliver time-release messages to a contact, update the contact record (e.g. tags), and assign tasks or send internal process notifications to Infusionsoft users.



Example Campiagn Sequences:

- An email series
- An automated sales process
- An internal business automation strategy
- A combination of all three

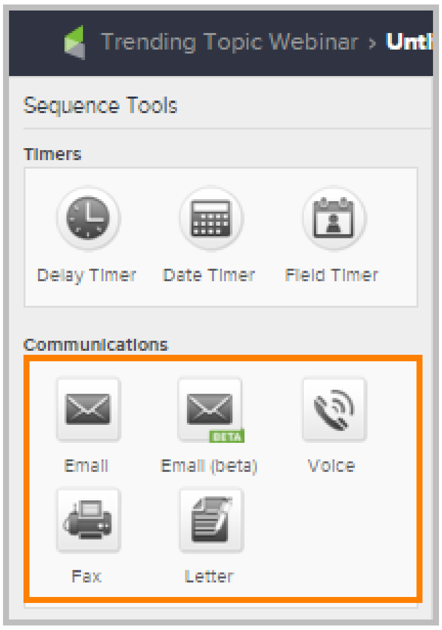
Sequence Timers: Sequence timers allow you to define when a series of communications or processes occur within a sequence.



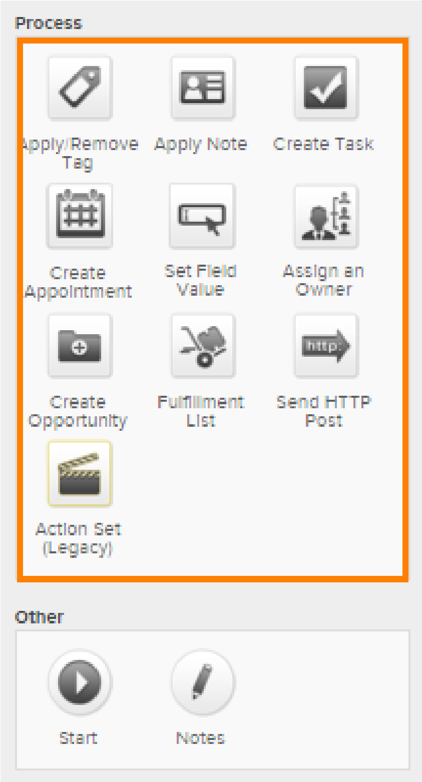
Example Timers:

- Delay Timers
- Date Timers
- Field Timers

Sequence Communications: Sequence communications are the individual components in a sequence that allow you to communicate to your audience. They are typically emails, but may also include faxes, voice broadcasts, direct mail, or a combination of all four.

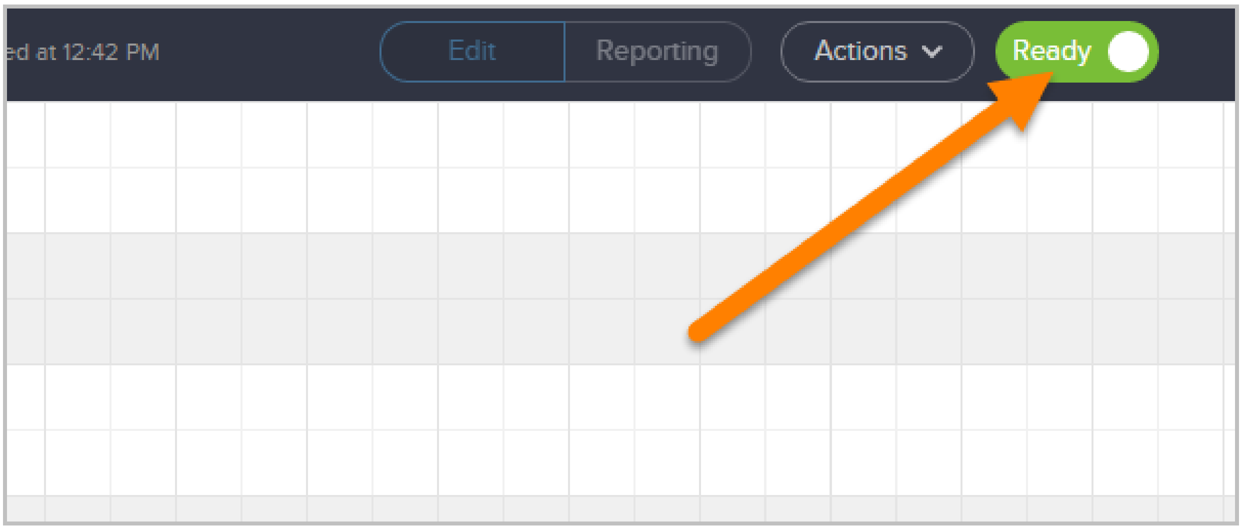


Sequence Processes: Sequence processes are the individual components in a sequence that create business automation. Adding a tag, creating a task, and assigning the contact to an owner are a few examples of the available processes you can implement in a campaign sequence.



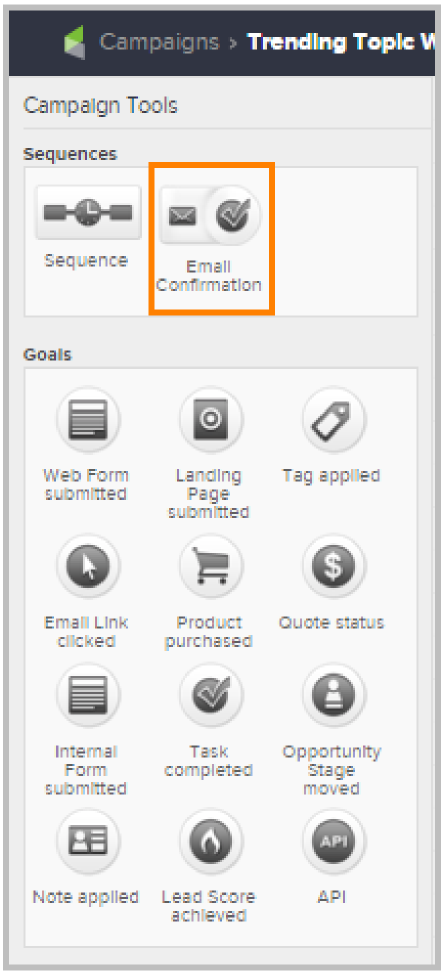
Draft / Ready

When something is in *Draft* mode, it is considered inactive or incomplete. For example, an email in *Draft* mode will not be sent. Once the item is ready, just toggle it to *Ready* and publish your changes.



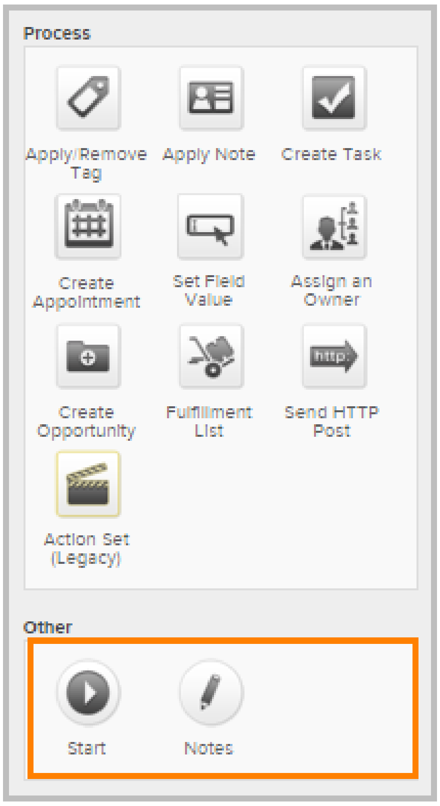
Email Confirmation Sequence

A special type of automated email sequence that sends an email confirmation request to contacts who have opted-in to a campaign.



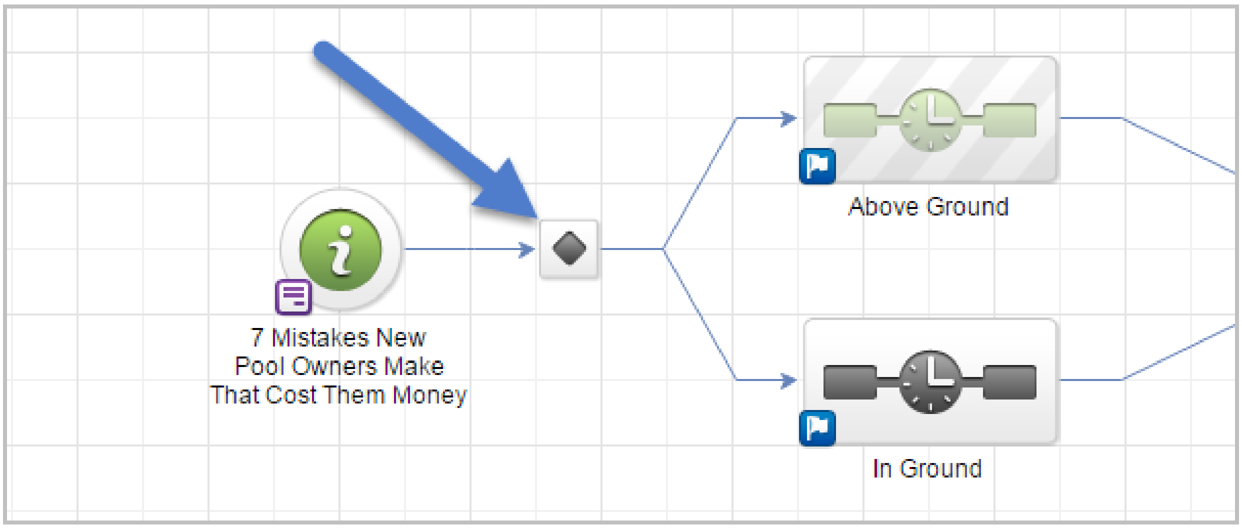
Notes

Notes allow you to document items on the canvas. You can document the purpose of the campaign, the intended audience, the call to action, or the goal the campaign is driving towards. Documenting your campaign is very useful when you are transitioning someone else into the role of managing your marketing campaigns.



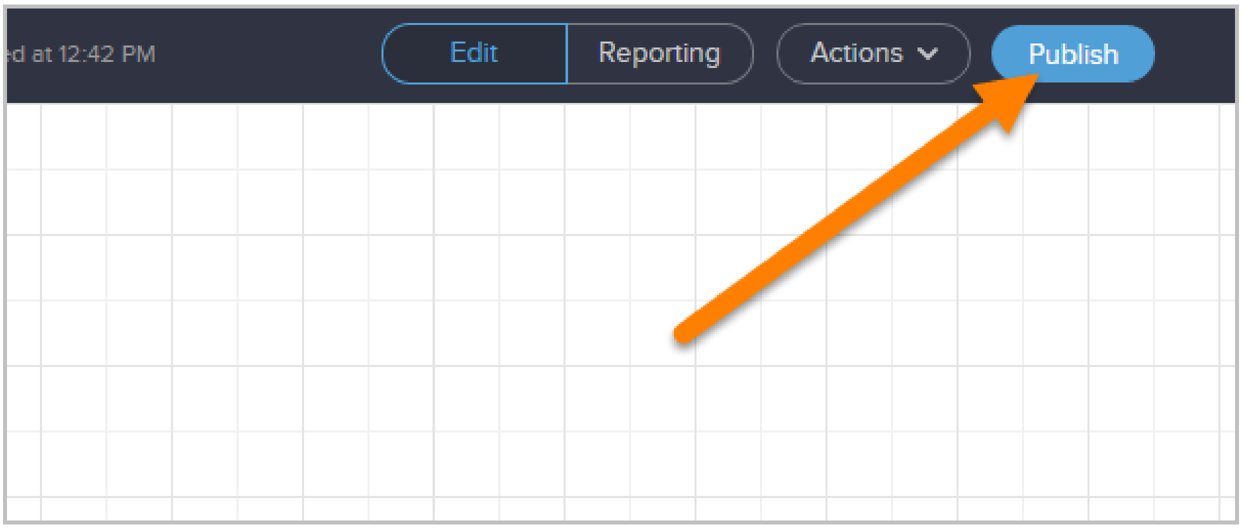
Decision Nodes

A decision node is a device that defines what path a contact will take when multiple pathways are present. A decision node will automatically appear when a goal is connected to two or more sequences.



Publishing

When you have finished building a campaign, or updating an existing campaign, you will need to publish your changes. Publishing is the act of "going live" with the campaign.



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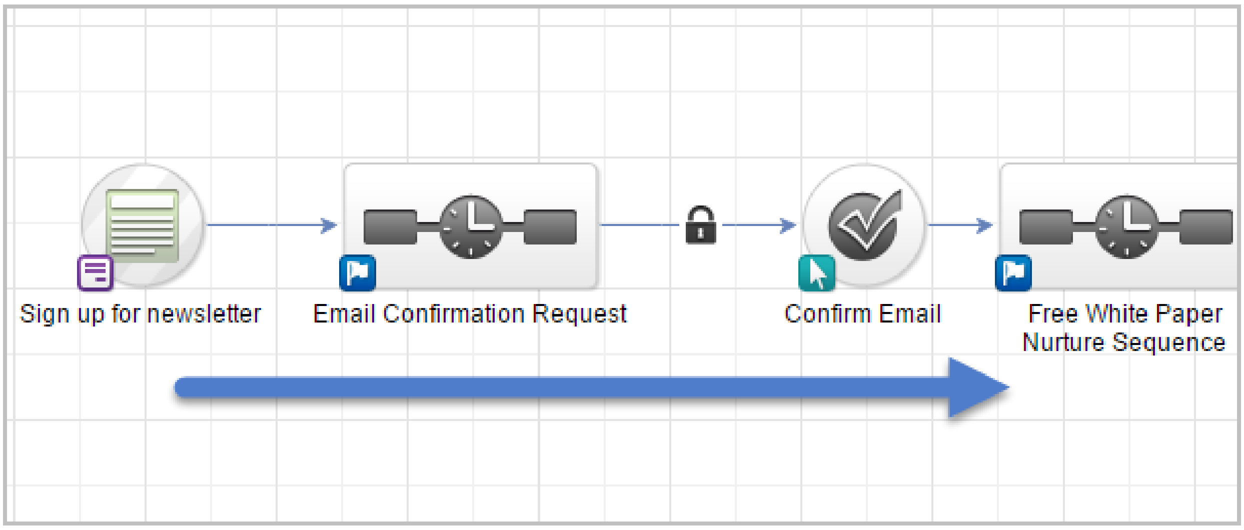
Campaign Builder Knowledge Requirements

Last Modified on 10/02/2018 2:57 pm MST

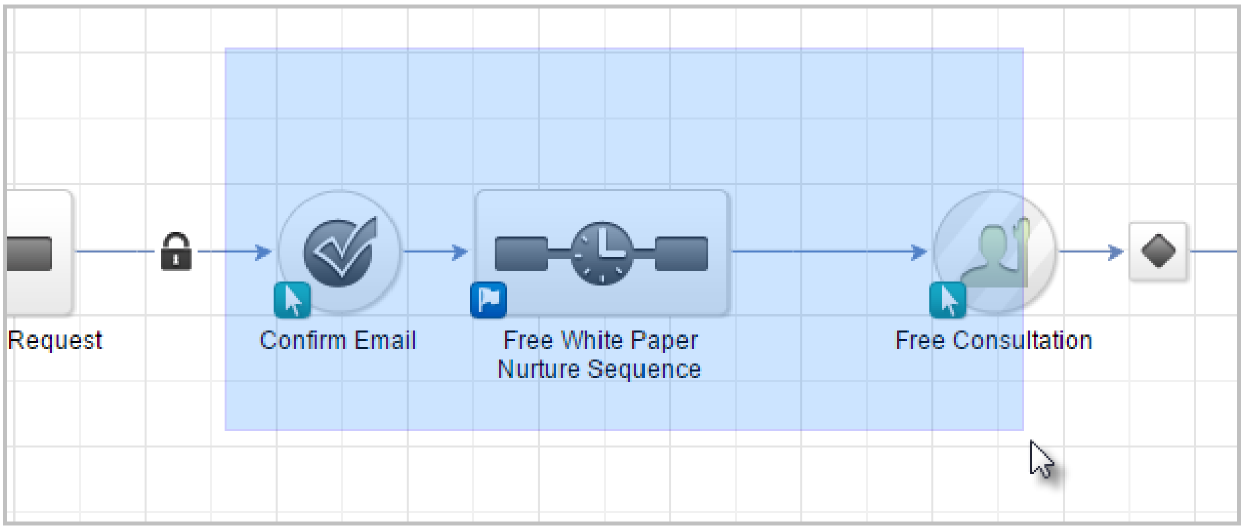
When constructing your campaign, build objects moving from the left side of the canvas, to the right side of the canvas.



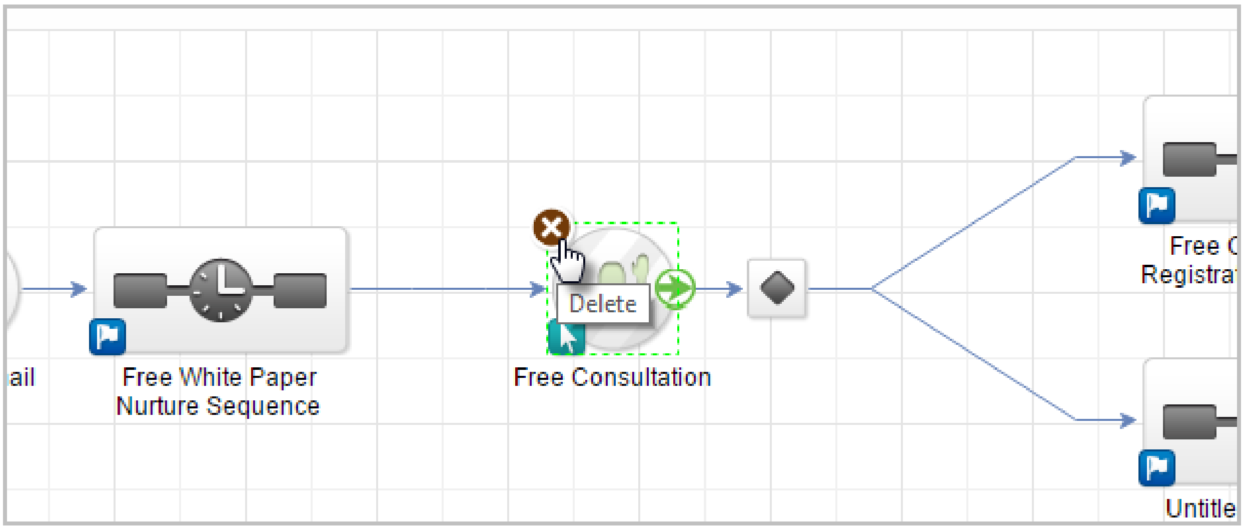
If you have a large campaign and need more canvas area to work with, hold right-click with your mouse and move your mouse around. This will move your entire campaign and allow you to see more blank canvas area.

Mac Tip! On a Mac, hold down the **Ctrl** key, then **click** & **drag** to move around the canvas.

To move groups of objects on the campaign canvas, left-click and drag a selection window over the objects

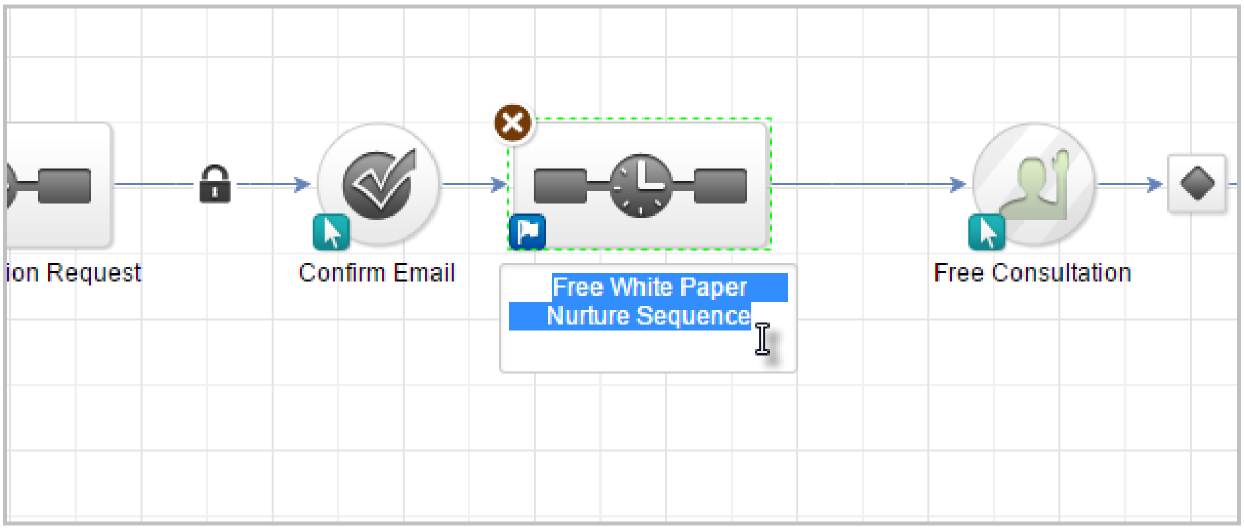


To delete an object on the campaign canvas, left-click the object and click the delete icon.

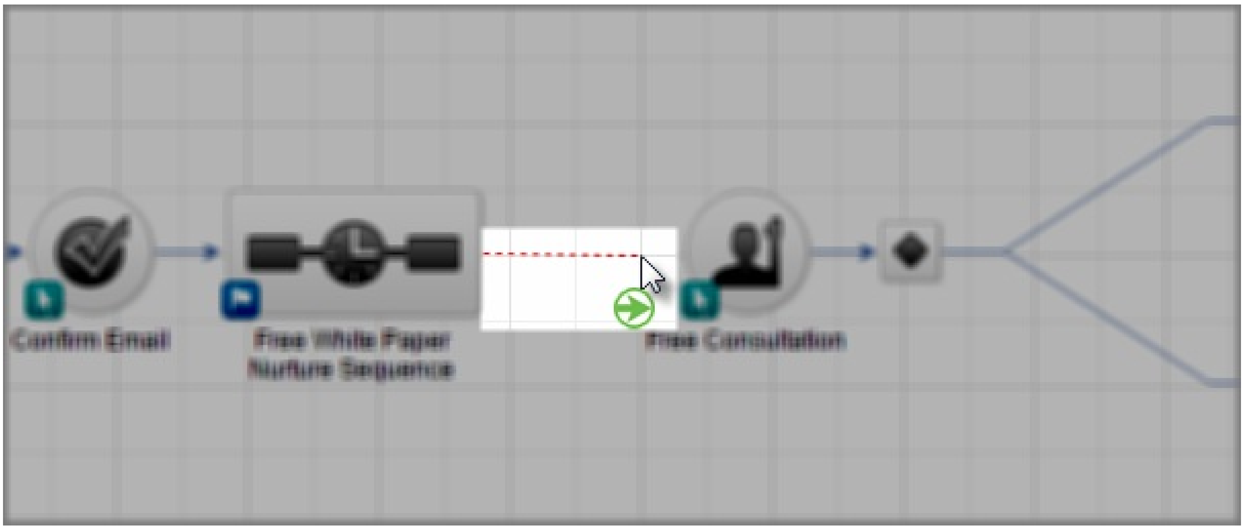


Warning! When you delete an object from the campaign canvas, the related content is also deleted and cannot be restored without restoring a previous version of the campaign. When a sequence is deleted from a campaign, the sequence is marked as done for all contacts who are currently in that sequence.

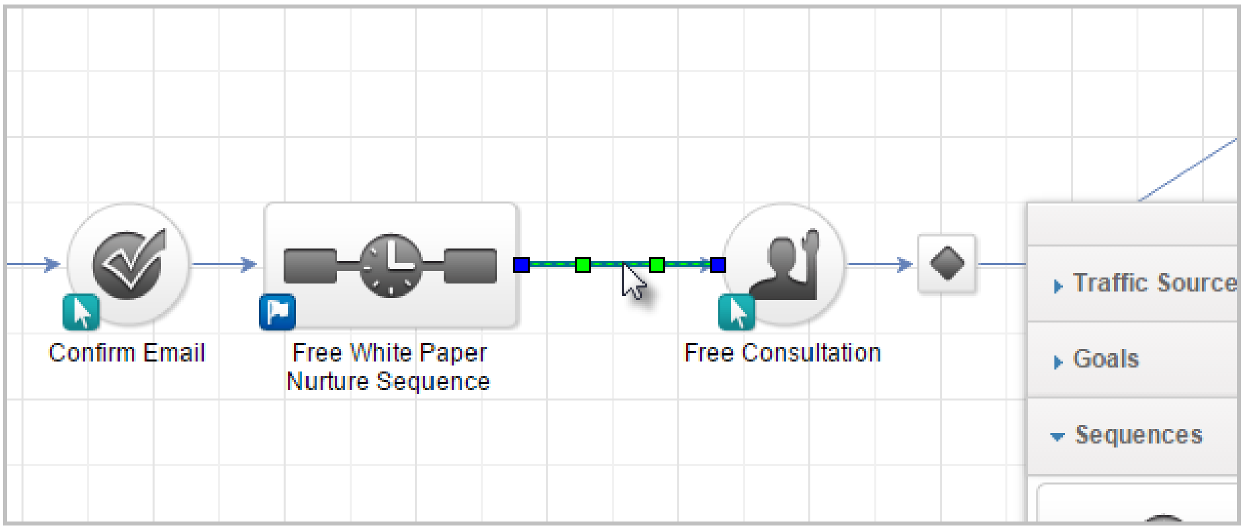
Double-click on any object description to rename it to something more useful



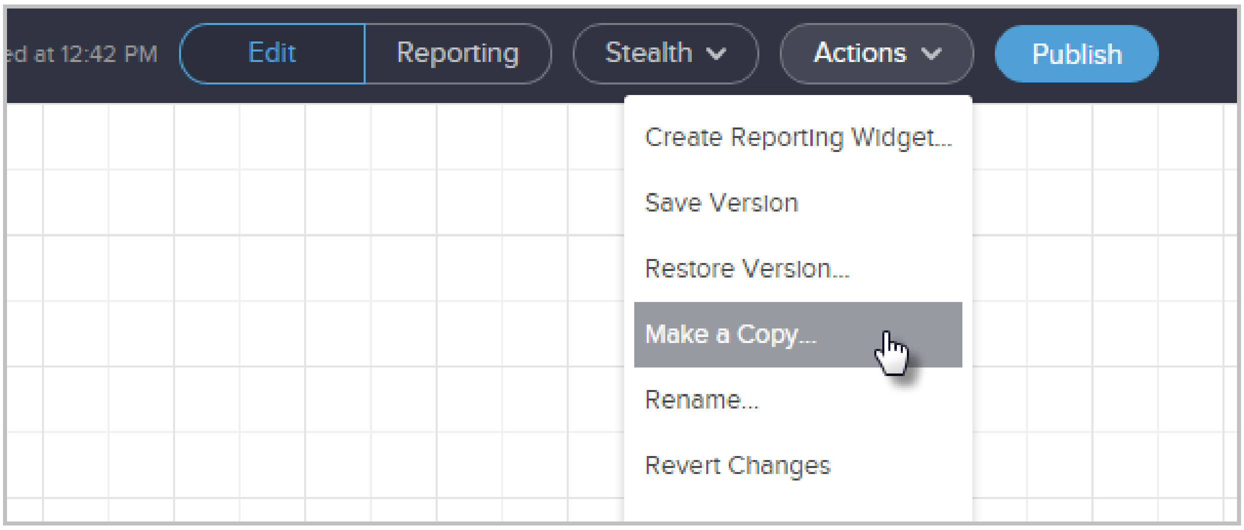
Connect objects by dragging the green arrow from one object to another



Remove connections, by clicking on the connecting line and hitting the Delete key



The campaign builder automatically saves your campaign every 30 seconds so you can work with confidence. You can restore a previous version of the campaign, clone it, rename it, etc...



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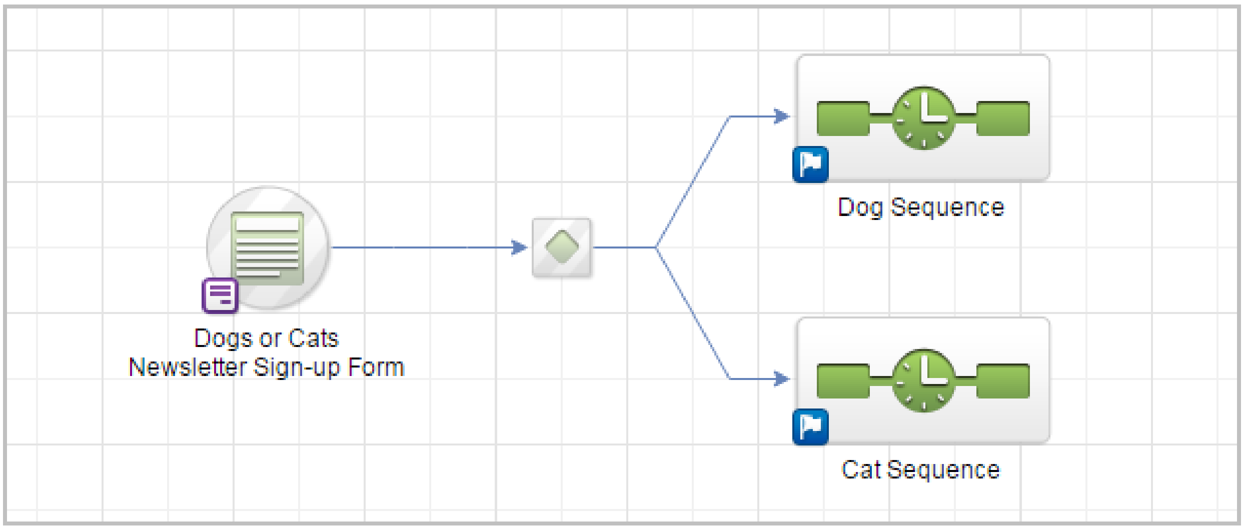
Add Someone To A Campaign

Last Modified on 07/25/2018 12:20 pm MST

Automatically adding someone to a campaign

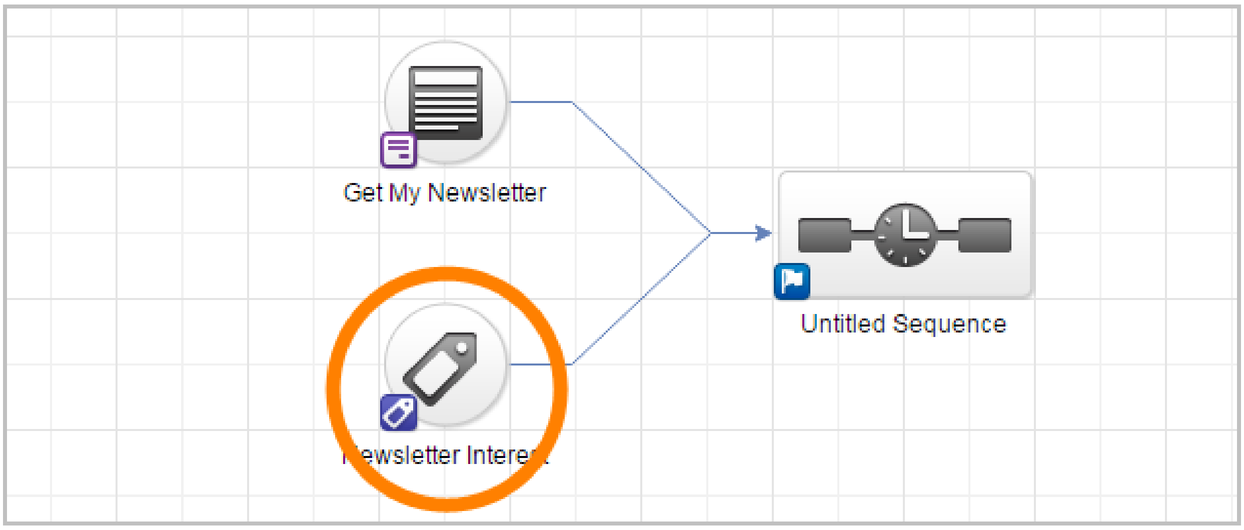
How someone is added to a campaign is dictated by a goal in a campaign. For example, in the campaign below, the first goal is for a person to fill out a web form to request information. Once this goal has been achieved, the person has now been "added" to a campaign.



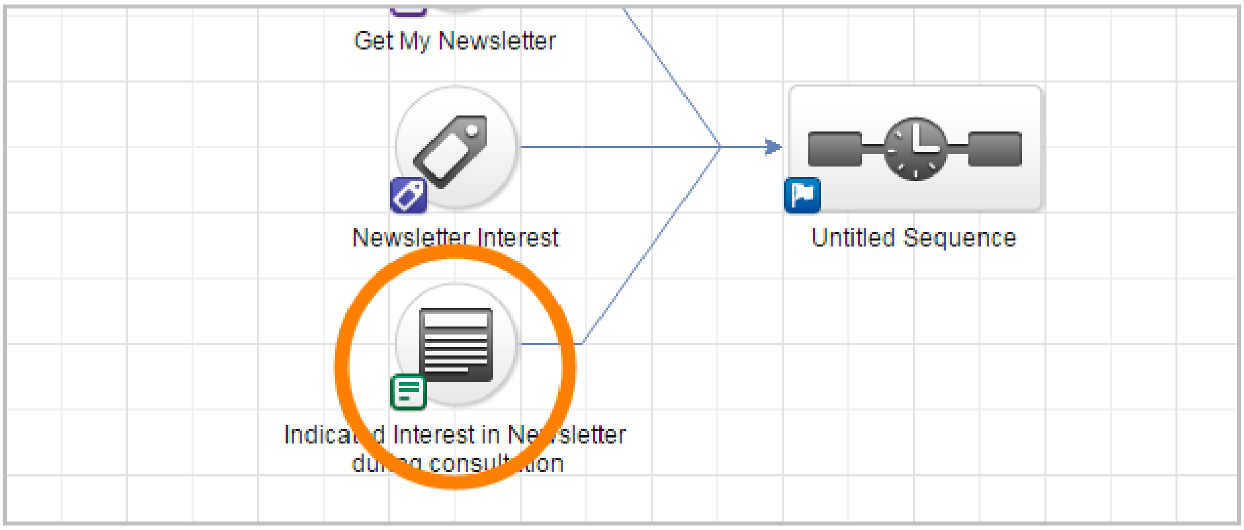
Manually adding someone to a campaign

In some cases, you may want add some logic to the campaign that will make it easy to manually add one-offs to the campaign. There are several ways to do this depending on your situation. Below are two ways to set up logic in the campaign builder to manually add individual people to a campaign:

- Add a Tag goal to the campaign. Whenever a specific tag is applied to a contact record, the goal will be accomplished, and the person will be added to the campaign.

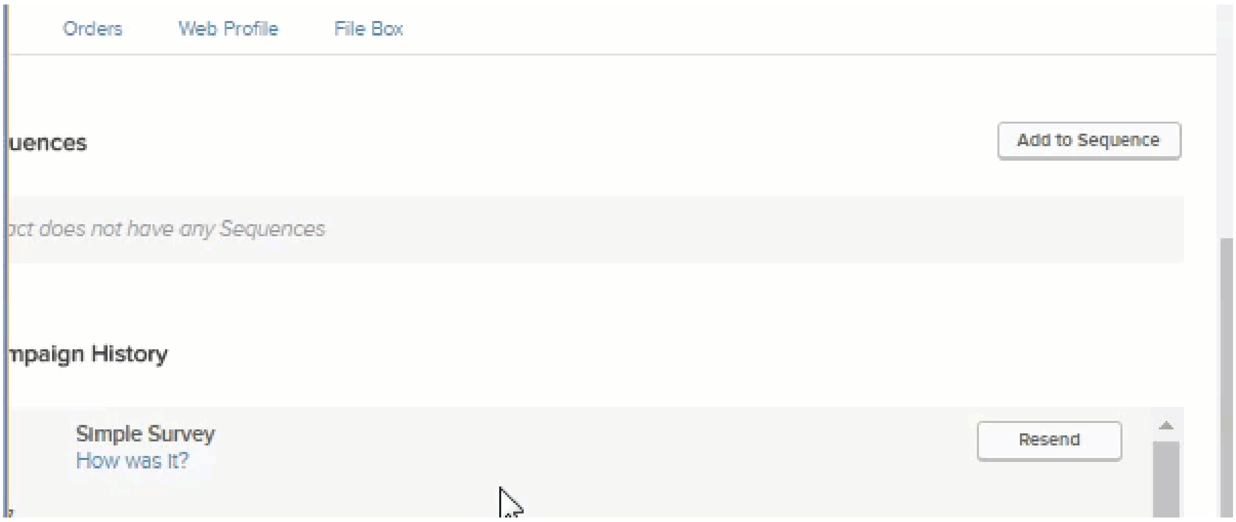


- Another method to manually add someone to a campaign is set up an internal form in the campaign. An internal form is similar to a web form, but an Infusionsoft user fills this out on behalf of a prospect.



Adding to campaign via the contact record

- While in a contact record, scroll to the 'Campaigns' tab. Here you will be able to click the Add to Sequence button at the top right.
- This will allow you to then choose a campaign, followed by a sequence that the contact will start at the beginning of. Click Add


Orders
Web Profile
File Box
uences
Add to Sequence
act does not have any Sequences
mpaign History
Simple Survey
How was it?
Resend

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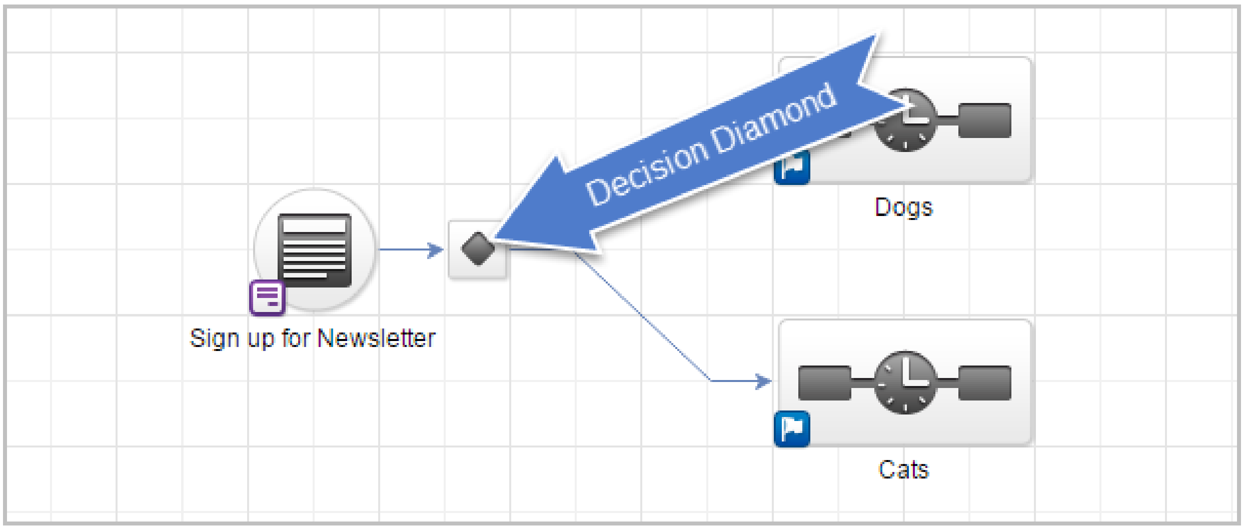
Connecting Objects In The Campaign Builder

Last Modified on 07/23/2018 1:12 pm MST

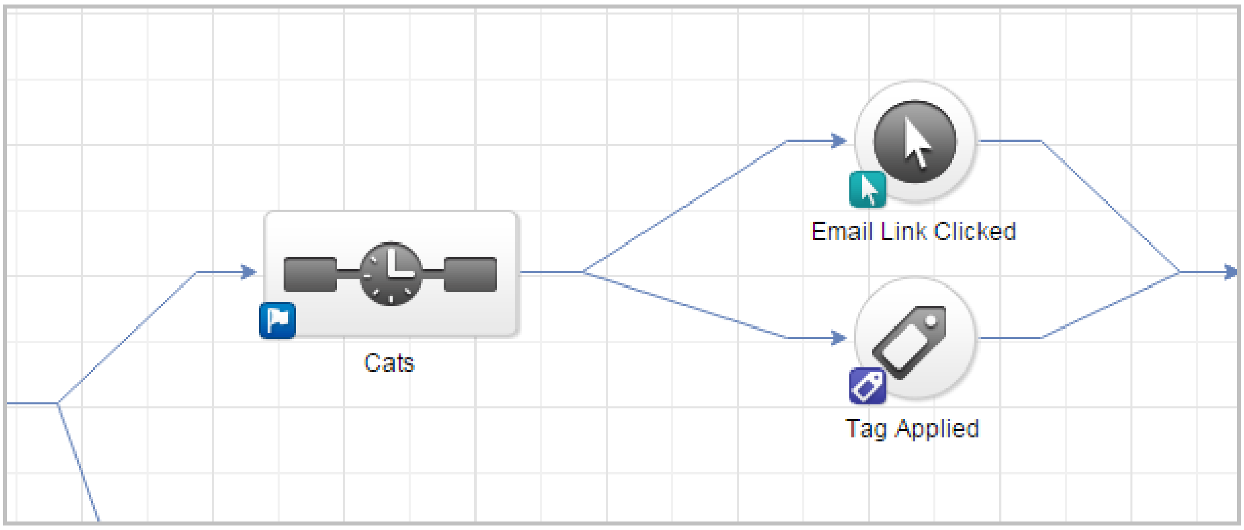
A campaign is assembled by arranging a series of goals and sequences on the campaign canvas. After the campaign objects are in place, they are connected together to define one or more paths. Campaign connections are created sequentially, moving from left to right. When a campaign goal is achieved, the earlier connected sequences (to the left) automatically stop, and the next sequential sequence(s) (to the right) automatically start.

The campaign builder has built-in checks that prevent you from making connections that don't make sense or won't function properly. This article outlines the allowable connections and helps you understand what to expect from each one.

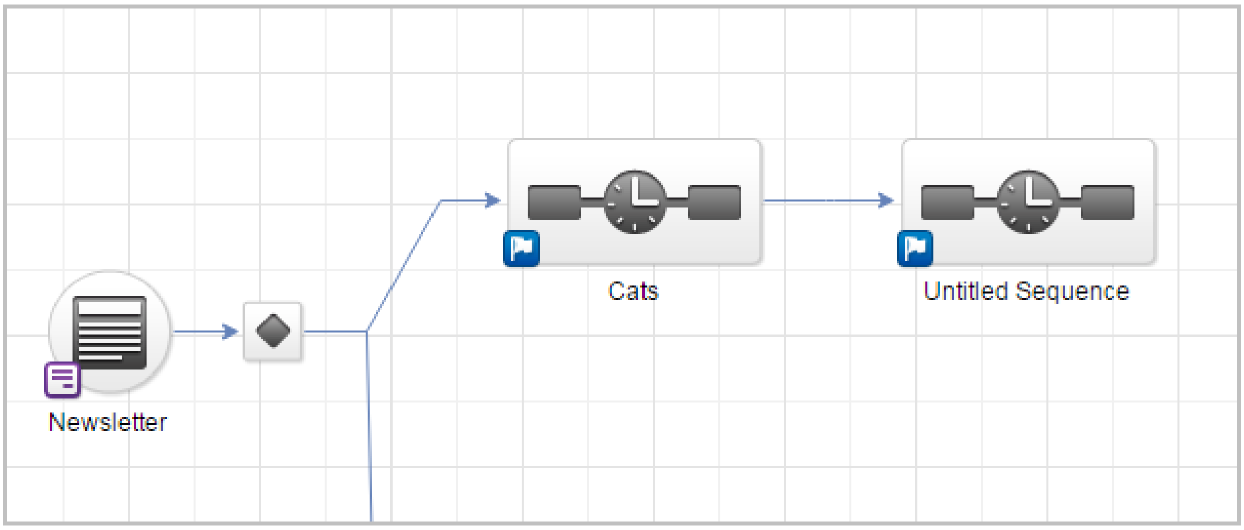
1. Goal to Sequence Connections. You can connect a goal to more than one sequence. When you do this, a decision point appears automatically. You must configure the decision point to define the contact's next appropriate sequence(s). The previous sequence(s) will stop, and the new one(s) will begin.



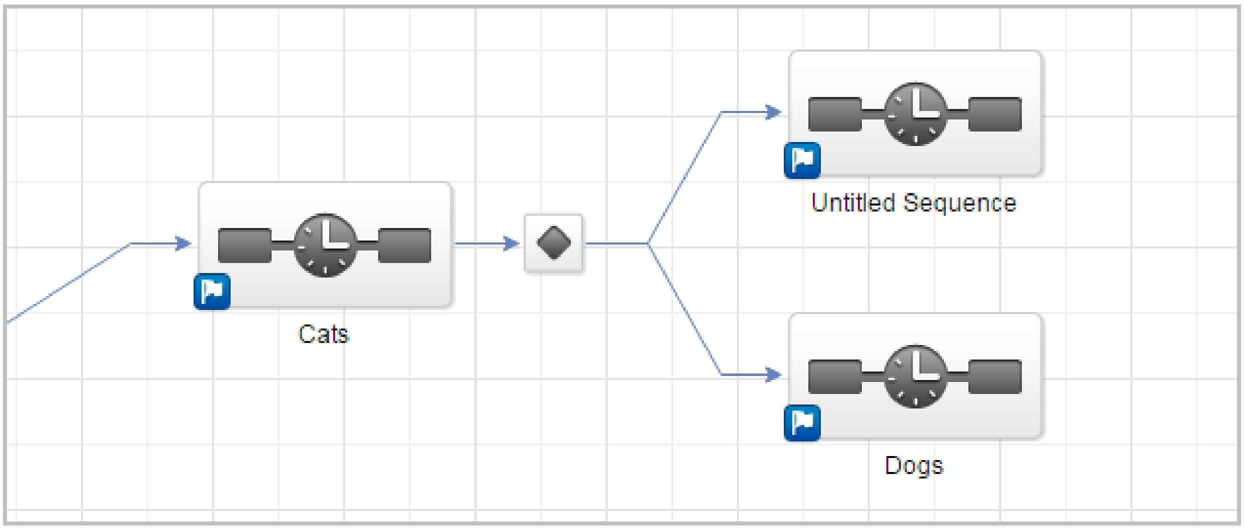
You can also connect a sequence to more than one goal. When you do this, the contact's previous sequence(s) stops and the contact enters the next sequence based on the first goal achieved. If both goals are satisfied and function independently (e.g. purchase two products, more than one tag is applied), then the contact may enter more than one sequence. You can edit the sequence settings if you want a specific sequence to "run until completed" instead of stopping when the subsequent goal(s) is achieved.



2. Sequence to Sequence Connections. When you connect a sequence to another sequence, the contact will enter the second sequence within one minute of completing the first.



If you connect a sequence to more than one sequence, a decision point appears automatically. You must configure the decision point to define the contact's next appropriate sequence(s). If a contact meets the criteria for more than one set of sequence rules they will begin more than one sequence. When the first sequence in the chain is completed AND one or more of the sequence rules are true for the contact, then the contact will move forward in the campaign. The previous sequence(s) will stop, and the new one(s) will begin.



3. No Campaign Connection. You can intentionally create a "disconnected" process within a campaign. This would allow the process to run in parallel to other campaign processes. The process would not stop. It functions independently of other campaign goals. The first goal in each process is a default entry point as well. A contact will jump into the process when the related goal is achieved, even if they are not involved in any other processes within the campaign.

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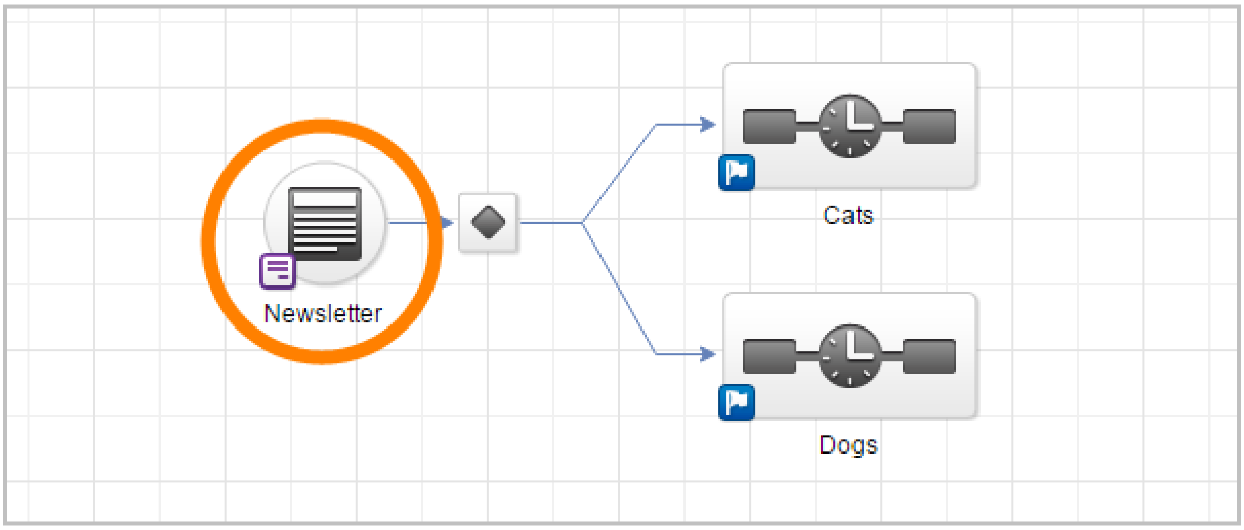
Publish A Campaign

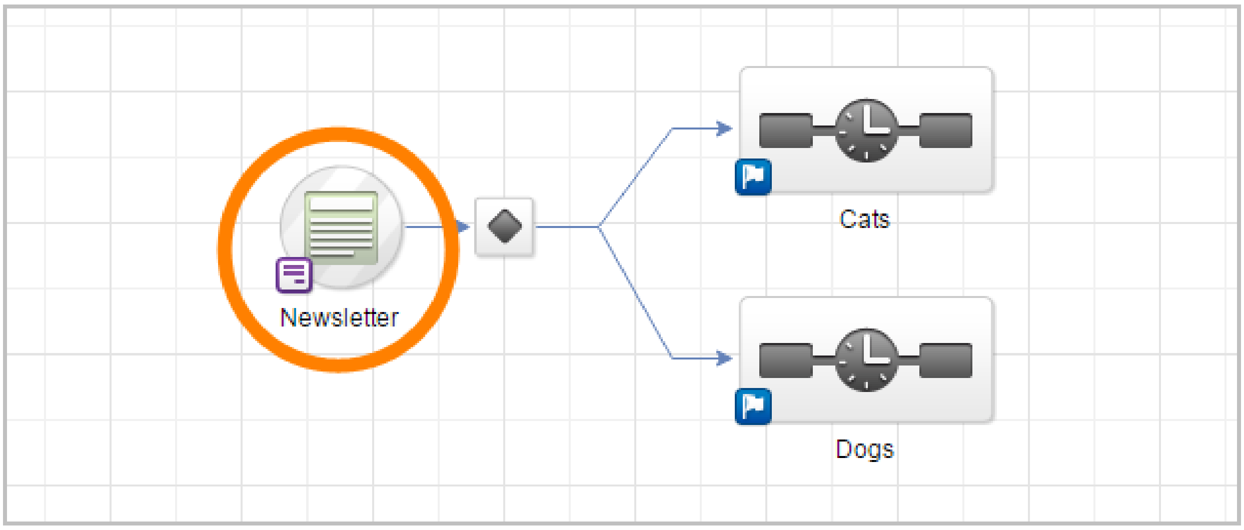
Last Modified on 07/23/2018 1:20 pm MST

When sequences, communications, goals and other items in the campaign builder are created a status slider button will be at the top right of each configuration page. The best practice is to keep the slider in Draft mode until editing has been completed for that item. When finished, move the slider to the Ready position. The Ready status indicates the object is ready to be published. To start using a campaign or have changes take effect, it must be published.

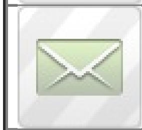
1. Example of a Web Form in **Draft** mode...



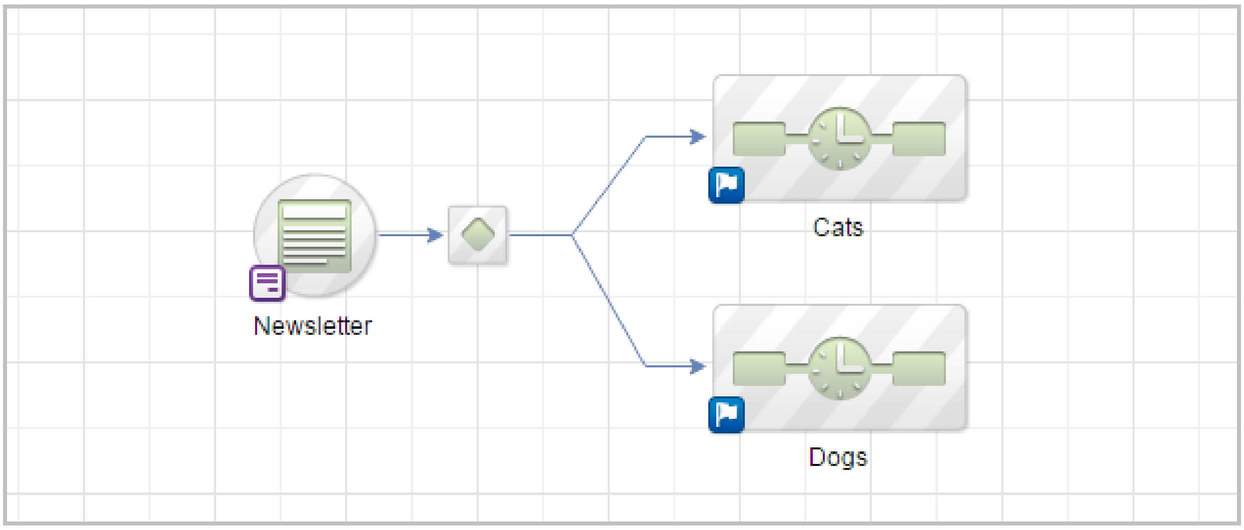
2. Example of a Web Form in **Ready** mode...



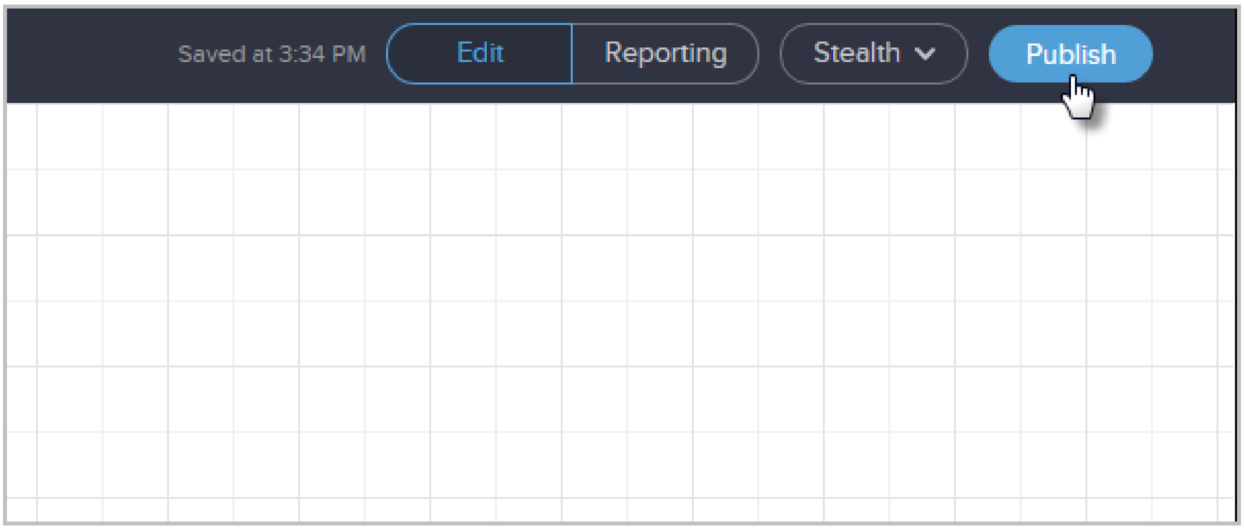
3. Color-Coded Objects

Icon Color	Meaning
	Black objects are still being drafted.
	Striped objects are ready to be published.
	Green objects have already been published.

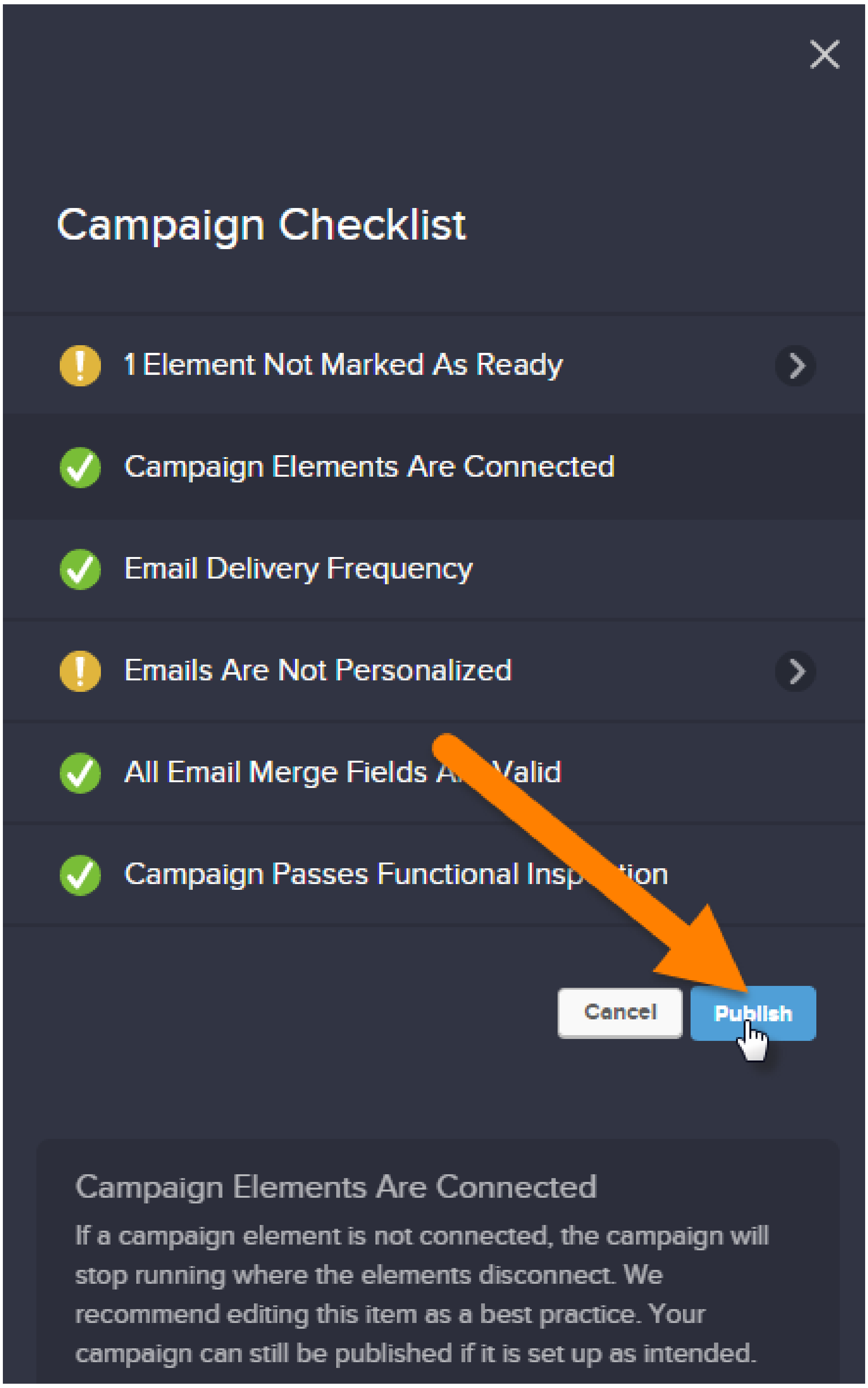
4. To publish a campaign...
   1. Make sure the objects in the campaign are in **Ready** mode.



   2. Click the **Publish** button located at the top right of the campaign builder.



3. After reviewing and resolved any items discovered in the Campaign Checklist, click the **Publish** button again.



5. Whenever a change is made to a campaign, the campaign will need to be published for the changes to take effect.

   Be aware of the following!
   Republish the campaign after moving objects around. Moving an object will not prompt to republish the campaign. It will only prompt for publish if campaign objects are added, removed or modified.

If an item is quickly switched from ready to draft to ready again, it will be flagged for publishing even when no changes have been made.

6. Important Campaign Builder Notes
   - Review sequence objects and make sure each email communication that was modified is set to "ready." If verbiage or images in "ready" emails are edited then updates will apply automatically.
   - Review the campaign sequences and make sure they are set to Ready.
   - Check the timer objects within campaign sequences. If a timer object is not configured, the objects that follow it in the sequence will not run (even if they are ready.)
   - Publish the campaign updates to apply the changes made during a work session. Campaign changes are not active until the campaign is published.
   - Do not mark incomplete objects as Ready or publish them until they are complete.

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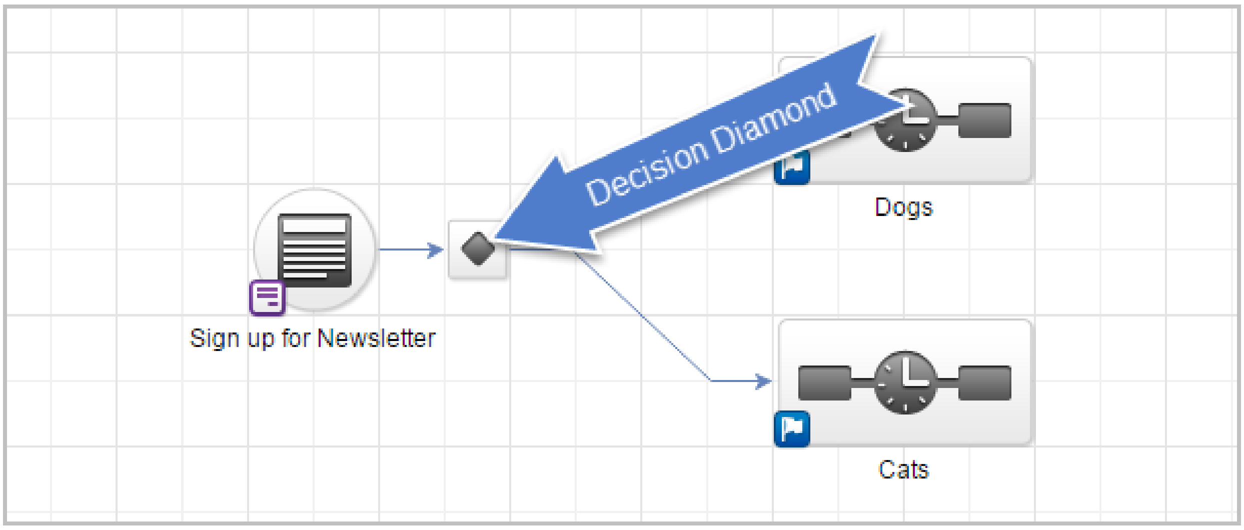
Decision Diamonds

Last Modified on 07/23/2018 1:13 pm MST

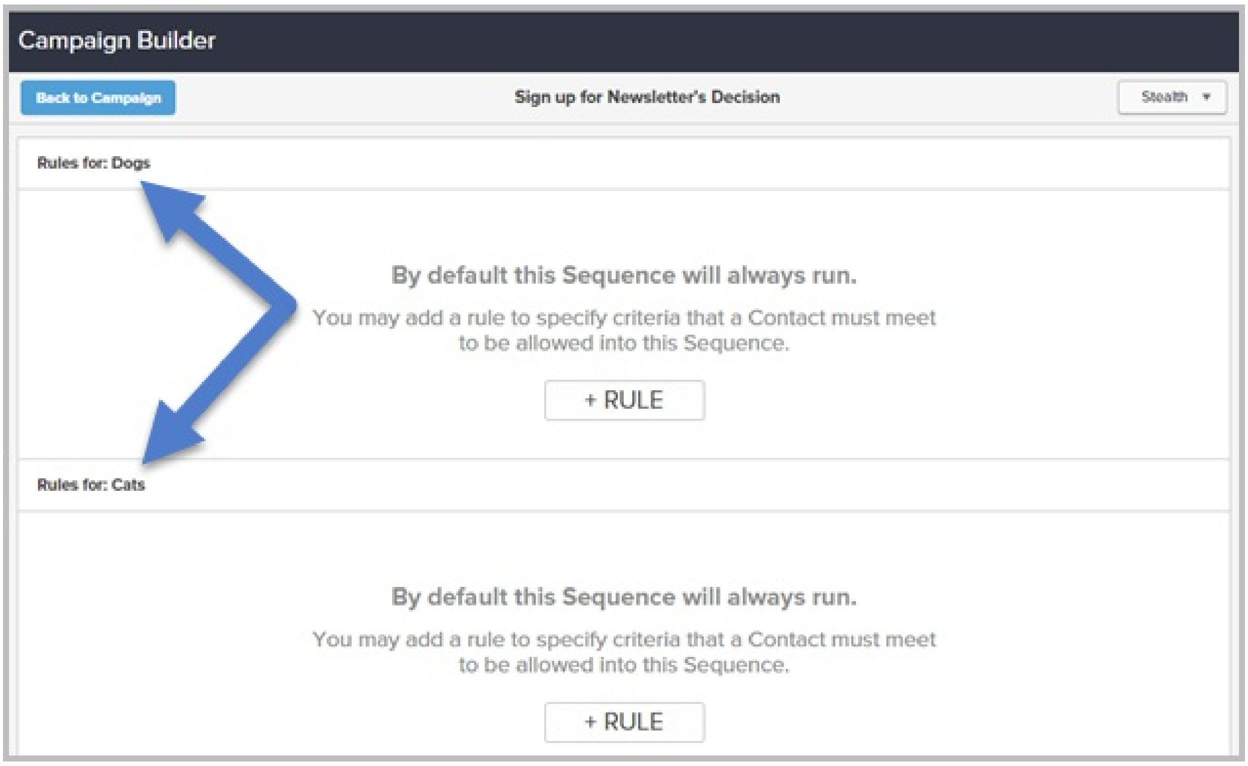
When you create a campaign, some of your business goals may have more than one possible outcome, and each outcome may take the contact down a different path. When this happens, Infusionsoft needs to evaluate the information available and use it to choose the appropriate sequence. In the example below, there is a newsletter goal connected to two sequences: *Dogs* and *Cats*. Let's assume the sign up form asks the user which animal they are interested in. If they choose *Dogs*, they go into the *Dogs* sequence. If they choose *Cats*, they go into the *Cats* sequence.

Pro-tip! Decision diamonds are created automatically when a campaign goal or a campaign sequence connects to two or more sequences.



1. Double-click the Diamond icon to set up the rules. On the Decision Rules screen, you will see at least two separate set of rule areas: In this example, there is one for the *Dogs* sequence and one for the *Cats* sequence. If we had another sequence for Hamsters, we would have that option as well on this page.

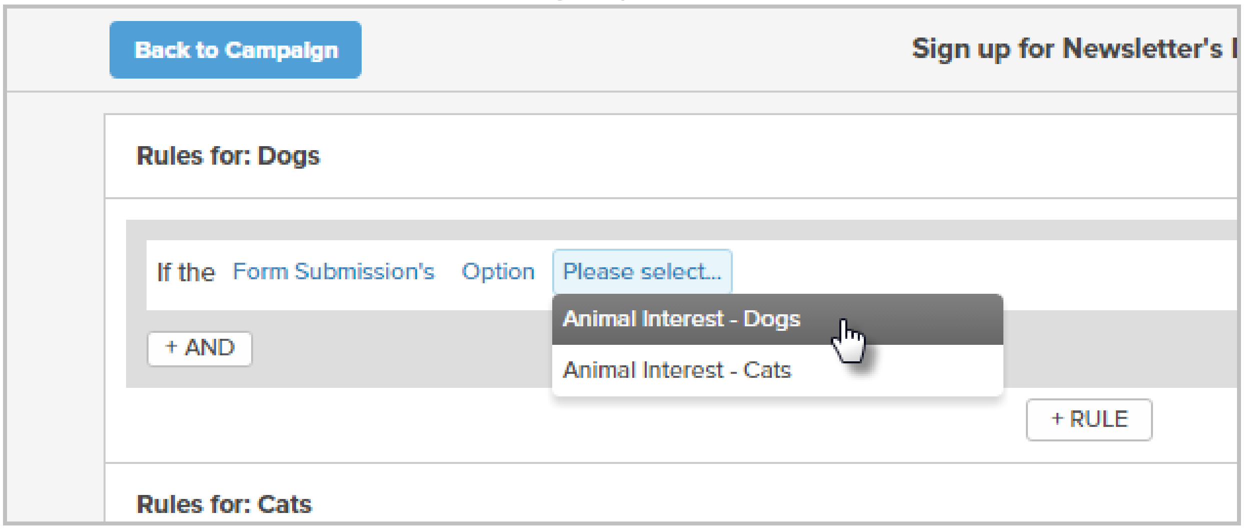
   Pro-Tip! The order in which the sequences appear on this page is determined by which item you connected your goal to first. I connected my web form goal to the *Dogs* sequence first, so it will be at the top of the page.



2. Click **+ RULE** button to set up your rule for each sequence. Rules can be based on tags, radio or checkbox options, custom fields and the following contact fields: Title, Job Title,

City, State, Country, Birthday, Contact Type or Owner. If a contact matches more than one rule, they will enter multiple campaign sequences. If no sequence rules are assigned, then ALL contacts will begin the related campaign sequence.

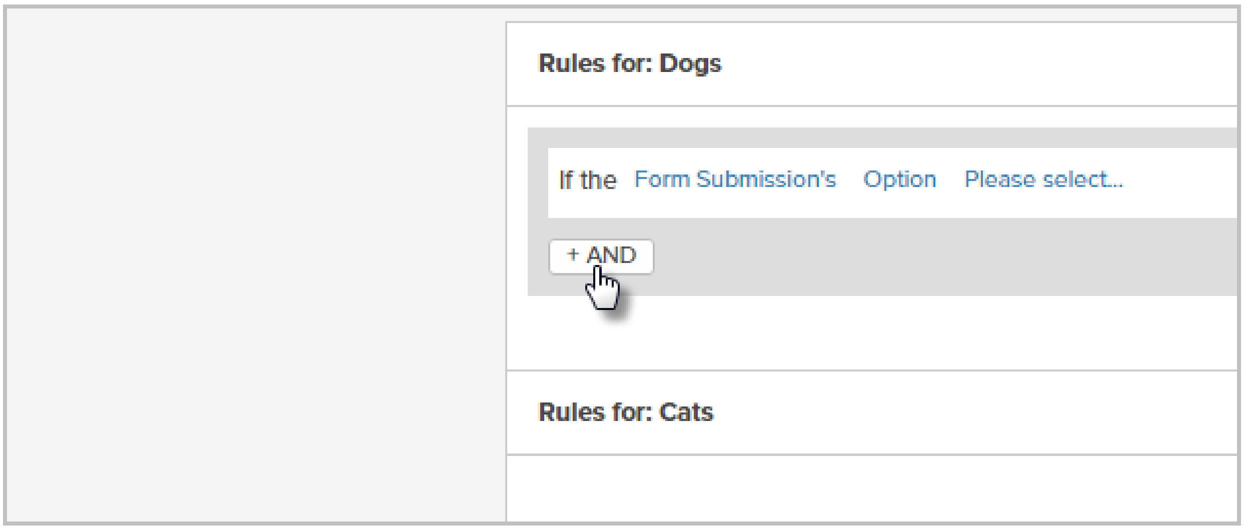
My rule for entering the *Dogs* sequence is that the user must choose the *dogs* radio button on the newsletter signup form. The criteria for this rule is shown below: *Form Submission* > *Option* > *Animal Interest - Dogs* > *is selected* (*Animal Interest* is the label of the radio button on the newsletter sign up form.)



Now, whenever someone chooses the *Dogs* radio button on the sign up form, they will enter the *Dogs* sequence.

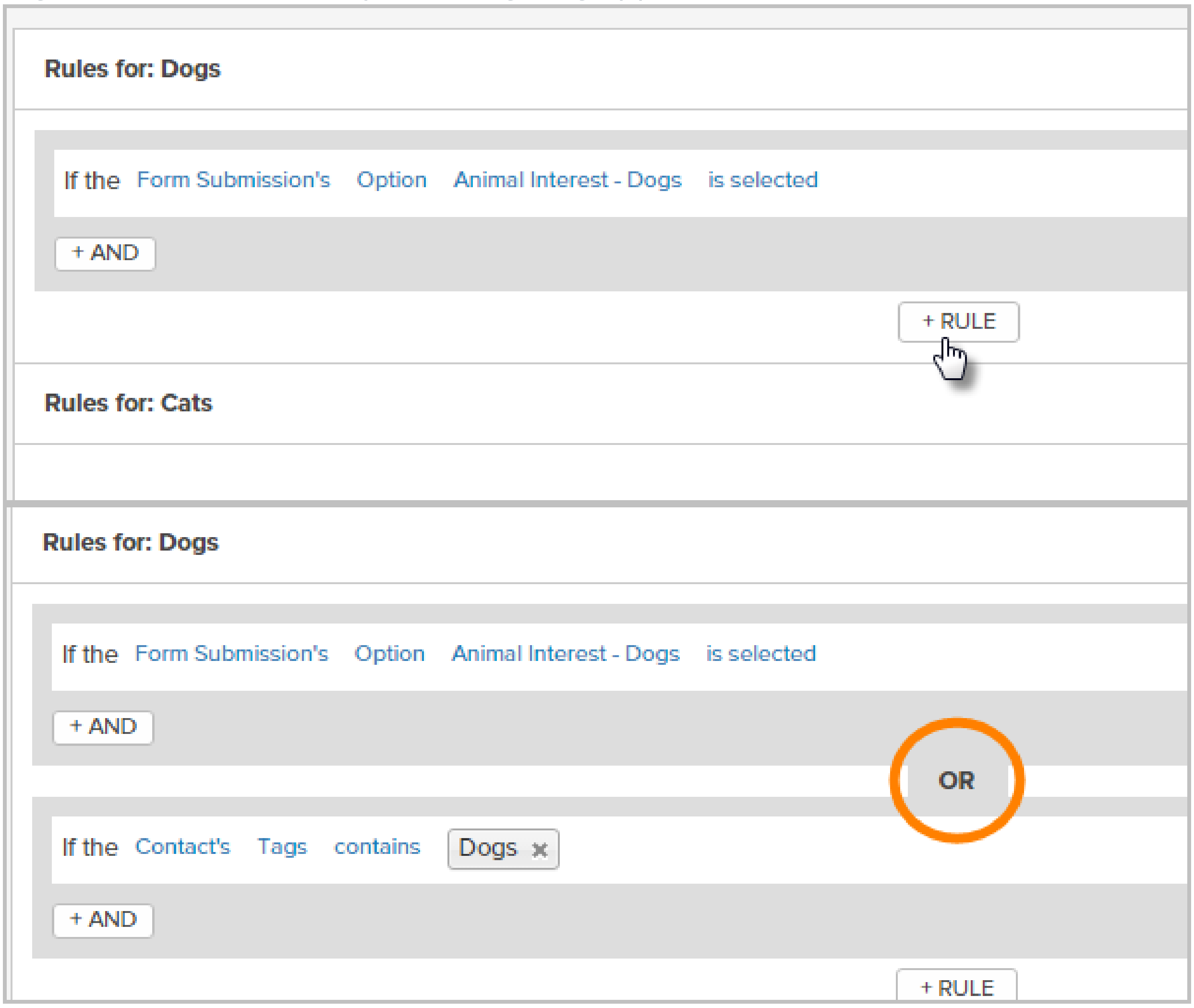
3. If a sequence path has more than one criteria, click the **+ And** icon to add other criteria

   Pro Tip! When you add the next criteria in this manner, the first criteria AND the second criteria must be true for the sequence to run. You can add an unlimited number of criteria.



4. You can also add an alternative rule or set of rules for each sequence. When you click

on the small **+ Rule** button, you are now adding separate criteria that can be met in order to move the contact into the *Dogs* sequence. When you add an alternative set of criteria, the first set of criteria must be true OR the second set must be true. In the example below, they will be moved into the *Dogs* sequence of they chose the *Dogs* radio button, or they have *Dogs* tag applied to their contact record.



5. Click on **Back to Campaign** when all of the sequence rules have been defined.

6. Advanced Logic Cheat Sheet. In the example above, the scenario was fairly straightforward: They either chose *Dogs* or *Cats* when they signed up on the web form. For more advanced criteria, here is a cheat-sheet showing the different rule combinations and what scenario they should be applied to:

Decision Diamond Rule Criteria	OR	AND
Contains	Contact has ANY one of these tags	Contact has ALL of these tags
Doesn't contain	See note below	Contact Doesn't have ANY of these tags

Doesn't contain "A" OR "B": This logic doesn't work due to the reason that the campaign will only check the first part of the rule. The proper way to set this up is Doesn't contain "A AND B".

Pro-Tip! Some campaigns containing decision diamonds may benefit from a 'Catch-All' sequence. A 'Catch-All' sequence is simply an empty sequence titled 'Catch-All' or 'Other', connected to the decision diamond, with no criteria rules, where all contacts will fall, to create a backup list of contacts, that have passed through the decision diamond. Having this in your campaign allows you to keep contacts in their current place in the campaign, while keeping a backup list of all contacts that passed through the decision diamond. This will allow for you to review any contacts that may not have met the criteria set, for another sequence.

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Campaign Canvas Basics

Last Modified on 07/23/2018 1:14 pm MST

The Campaign is where you can create automation. This can be as simple or as complex as you need it to be.

Campaign Sequences

Where your automation is built. You can have tags applied, Tasks created, Email Sent, and more

Campaign Goals

How you add/remove contacts from the campaign sequence based on accomplishing that goal type. Example Submitting a Web Form accomplishes the Web Form Goal. If the Web Form was Before the Sequence the Contact would be added. If the Web Form was After they would be removed. To see more on how an End Goal works

Contacts in Campaign VS Any Contact

If your campaign sequence has a middle goal. You have an option of allowing only contacts in that campaign to accomplish it to move into the following sequence OR you can allow ANY contact to accomplish it.

An example is if you have a Purchase goal connected to a Thank You sequence. Changing it to ANY contact would allow any contact to receive the Thank You email regardless if they started in the campaign.

Sequence Flag

A Goal after a sequence will remove the contact when accomplished.

You do have the option to change the Sequence so that the contact is NOT removed. Changing the Flag to "Runs Until Complete" will allow the contact to stay in the current sequence until it's completed. *Note - The contact will be moved into the sequence following the goal AND complete the sequence with the "Runs Until Complete"

Convert Goal, Duplicate, and Delete

Instead of deleting and then re-adding a Goal, you Right Click on the goal to convert it. This makes customizing your campaign a snap. The Right Click also allows you to duplicate and delete (both with goals and sequences)

Reporting Tab

View where you contacts are currently in the sequence. You have the ability to customize your date range, to view past email performance (opens, clicks, opt-out s, bounce s, etc.), all from the reporting tab in the campaign builder.

Important Note!

- You will be able to pull reporting back to **May 1st, 2017** in existing campaigns.
- You cannot yet click on the numbers next to the different email activities recipients are doing... future iterations will allow users to see contacts doing that behavior and take action on them

Also view the campaign email statistics, at a glance, from within the campaign builder's reporting tab.

- Clicking the Sequence & Email Report button will display a summary report for all sequences that contain email(s).
- All Sequences containing an email will be listed and a report that shows the open and click % for each email.

- Opt-out, Un-open counts and other useful metrics are available

To view Campaign Contacts hover over the Goals/Sequences to click the "Blue People" this can be done inside the sequence as well.

Actions Button

Create Reporting Widget

Quickly create a Campaign Dashboard Widget

Save Version

The system automatically creates a version of each published campaign. You can also save a version whenever you wish. A version contains a snapshot of the campaign traffic sources, goals, sequences, and decisions. It is a good idea to save a version when you plan to modify it significantly by adding/removing goals and sequences. A version does not store previous content (e.g., landing page or sequence email content) or the decision point settings. Object configurations and content always reflect the most recent edits.

Restore Version

The versions are date stamped and stored so you can rollback the campaign to a previous version. You might decide to do this if campaign performance drops after you make significant changes to it. It is a good idea to save the current version of the campaign before you restore a previous version.

Make a Copy

This option creates a completely new campaign by copying the existing one. The edits you make to the new campaign will not affect the original. The new campaign is "unpublished" by default. If you create a new campaign, you will need to change form code and landing page links to begin using the new goal objects. You might make a copy of a campaign to speed up the process of creating a new campaign for a different audience (e.g. partners). The email, web form, and landing page styles and content from the first campaign are applied to the copy.

Rename

Change the name of your campaign

Revert Changes

This option allows you to "undo" the work from your current session. The revert option restores the campaign to the way it looked when you first opened it during this work session. You might need to revert a campaign if you accidentally delete campaign objects or make some other kind of significant mistake.

Unpublish

This action will:

- Remove all contacts from the campaign
- Disable all automation - All published goals and sequences will be switched to the Ready state (striped green) to indicate that they are no longer published, but ready to be published again
- The Last 24 Hour and Last 30 Day reporting data for the campaign will be preserved (Current will no longer be accessible), though it will still "expire" (e.g., 24 hours after unpublishing, the Last 24 Hour reporting will show all zeros because there will not have been any activity in that time-frame)

In addition, when unpublishing, Infusionsoft will check to see if there are any published web forms or landing pages in the campaign. If there are, you will be presented with the option to customize the error message displayed when the forms are filled out (e.g., if a form is not removed from your website, or the link to the hosted version is still live.)

Print

This option sends the current version of the campaign to your printer.

Save as Image

This option allows you to save your campaign as a jpg image file

Merge Fields

Campaign merge fields are useful time-savers when information in your campaign changes frequently. For example, if you have five emails in a campaign that all reference a constantly changing date, a campaign merge field will save you from editing all five emails every time the date changes; all you have to do is change the value of the campaign merge field.

- The merge field can only be text
- There is no limit to the amount of campaign merge fields you can create
- A campaign merge can only be used in the campaign that it was created in
- Campaign merge fields are available to use in any email from the campaign that it was created in

Links

Campaign links are useful time-savers when hyperlinks in your campaign emails change frequently. A campaign link works very similarly to a campaign merge field.

- The merge field can only be text
- There is no limit to the amount of campaign merge fields you can create
- A campaign merge can only be used in the campaign that it was created in
- Campaign merge fields are available to use in any email from the campaign that it was created in

Edit Campaign Category

Organize your list of campaigns using Campaign Categories

- To assign a campaign to a category, open your campaign and click the **Edit Categories** option under the **Actions**drop-down.
- Choose the campaign category and click **Save Categories**.
- A campaign can be added to multiple categories

Publish Button

To start using a campaign or have changes take effect, it must be published.

- Make sure the objects in the campaign are in Ready mode.
- Click the Publish button located at the top right of the campaign builder.
- After reviewing and resolved any items discovered in the Campaign Checklist, click the Publish button again.

Whenever a change is made to a campaign, the campaign will need to be published for the changes to take effect.
Do Not mark incomplete objects as Ready or Publish them until they are complete.

Be aware of the following

If an item is quickly switched from ready to draft to ready again, it will be flagged for publishing even when no changes have been made.

Some Goals and Sequence processes have a Draft slider that you move to Ready but some just require you to configure and click Save to become Ready.

Draft to Ready Examples

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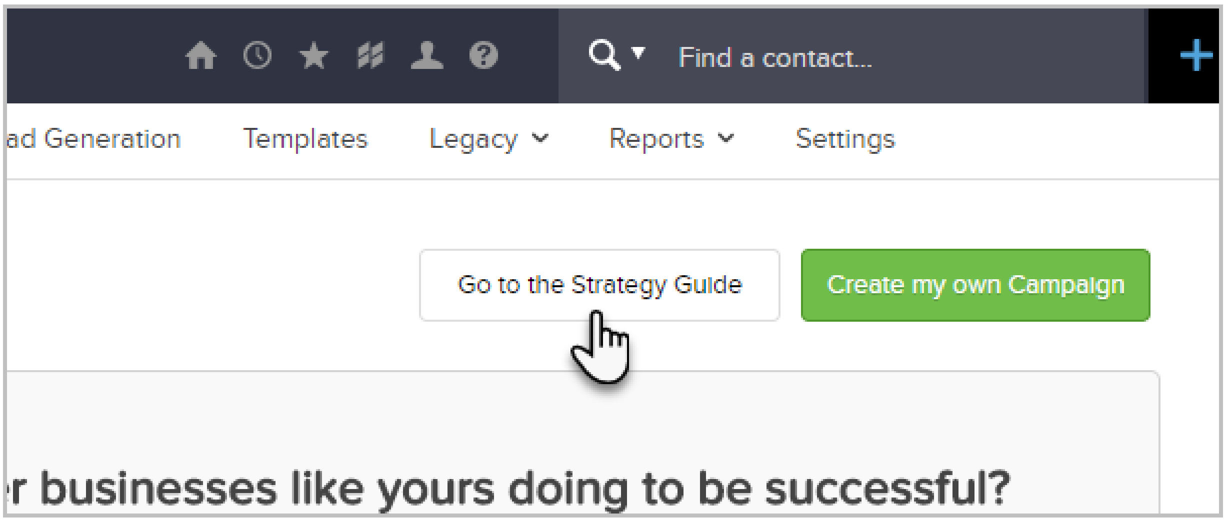
Install Pre-Built Campaigns

Last Modified on 07/23/2018 1:14 pm MST

1. Go to **Marketing > Campaign Builder**

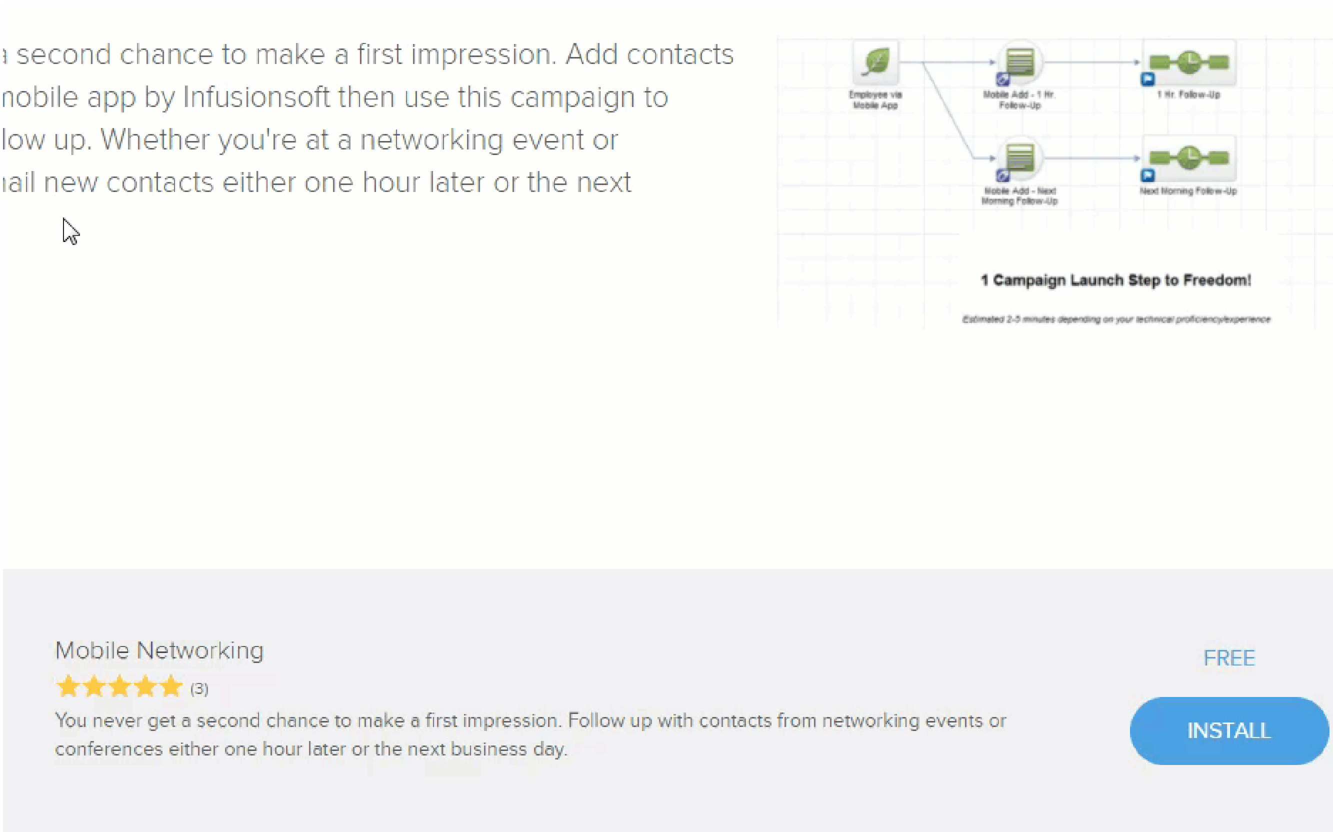
2. Click the Go to the Strategy Guide button.



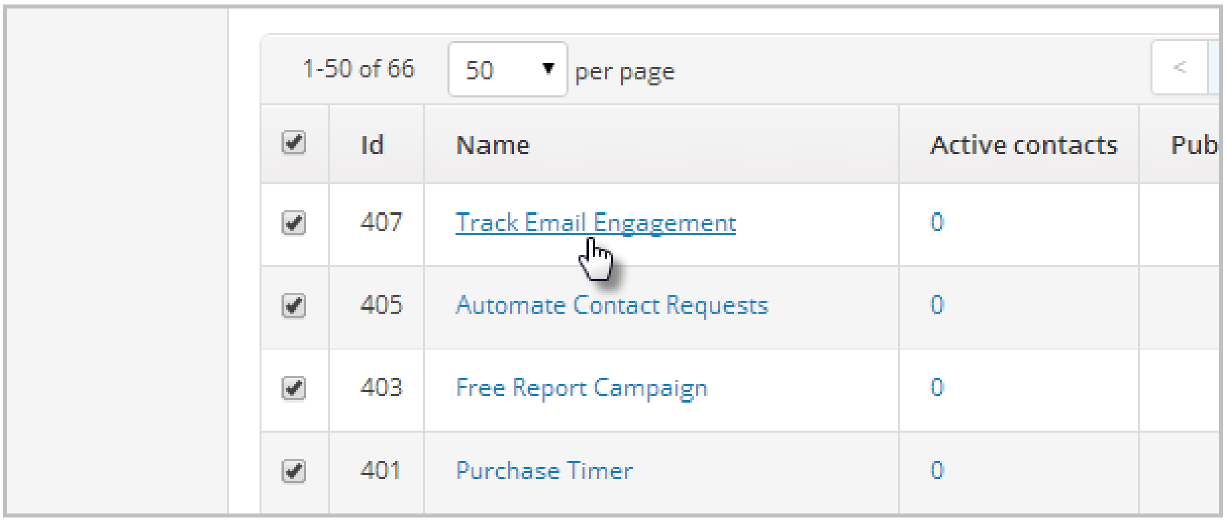
3. Follow the Strategy Guide and click on a campaign. You will be brought to the Infusionsoft marketplace in order to download the campaign.

4. To download the campaign into your application, click the **Install** button below the campaign preview/description. A pop-up selecting your compatible Infusionsoft Application will appear. Confirm that your application is selected, and click the Begin

Install button.



5. Your new campaign is ready to customize. It will appear in the list of campaigns.



1-50 of 66 | 50 per page

☑	Id	Name	Active contacts	Pub
☑	407	Track Email Engagement	0	
☑	405	Automate Contact Requests	0	
☑	403	Free Report Campaign	0	
☑	401	Purchase Timer	0	

6. All campaigns will have instructions on what needs to be customized. Just explore the campaign and read the notes for more details.

7. When you are ready to go live with your campaign, just click the**Publish** button to make it live.

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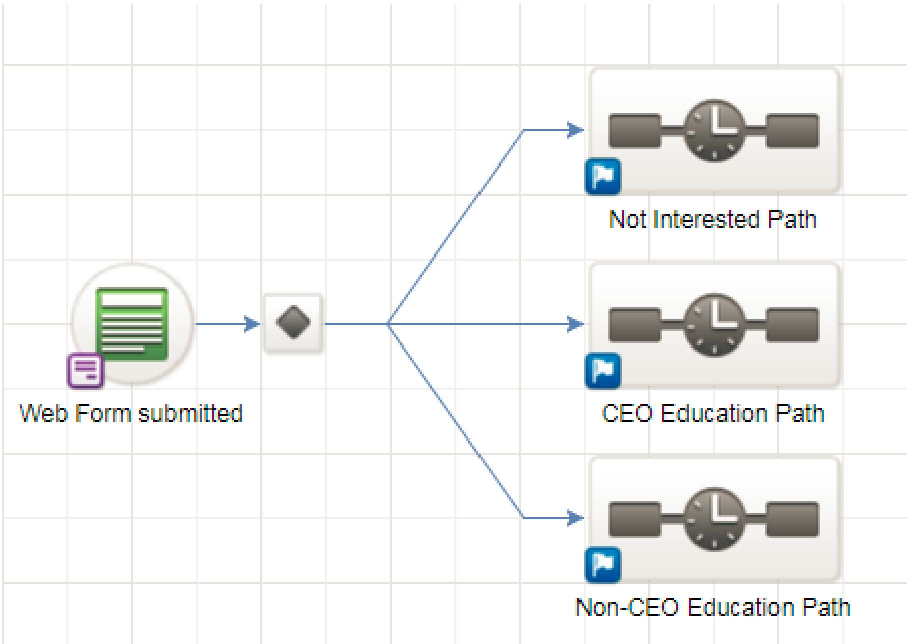
Testing Decision Diamonds

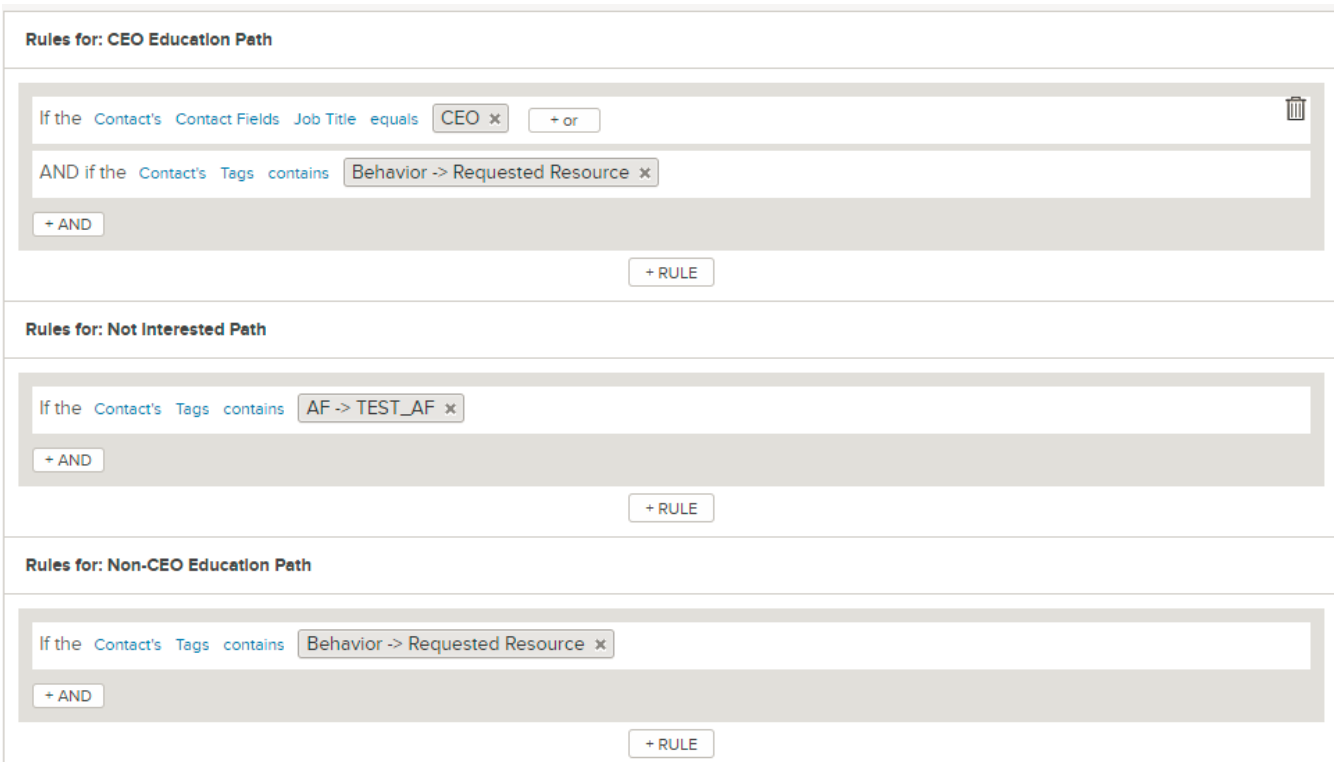
Last Modified on 07/23/2018 1:13 pm MST

Infusionsoft offers a tool that allows for you to test decision diamond logic, from within the decision diamond criteria setup. Below, are instructions on using this tool, to test decision diamond logic, in order to give you full confidence that your contacts will move into the appropriate sequence, or help you see adjustments that need to be made.

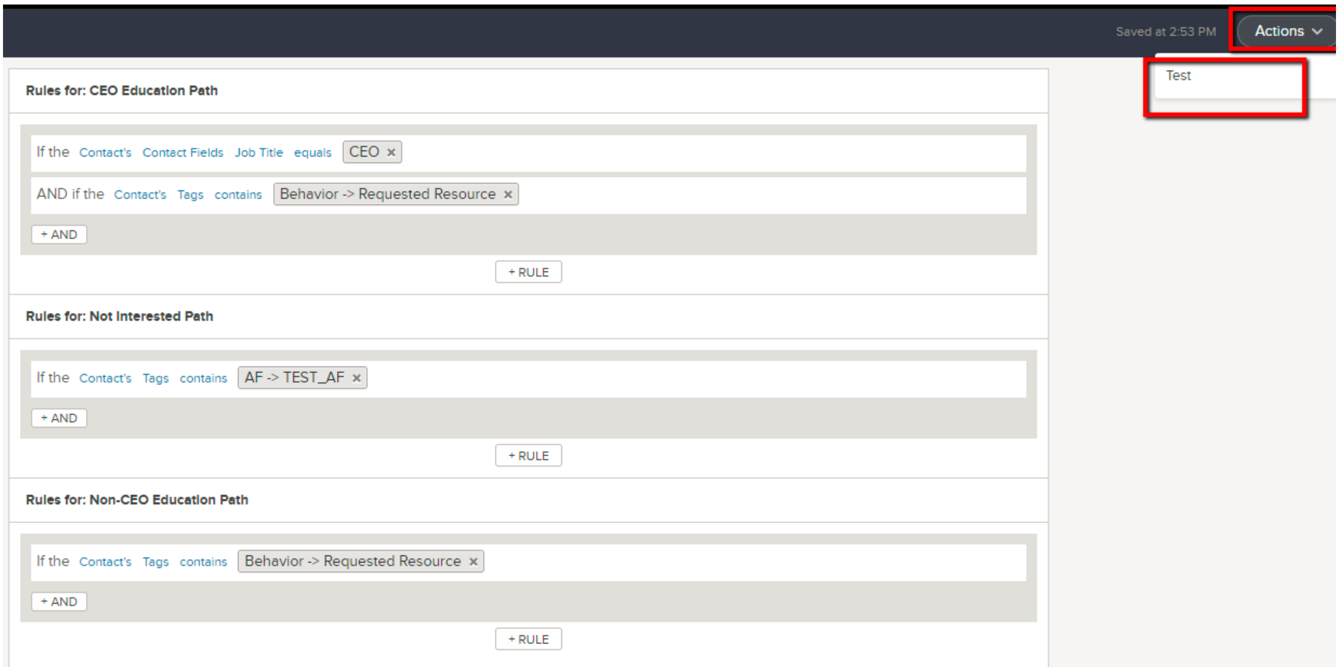
1. Double-click on the decision diamond



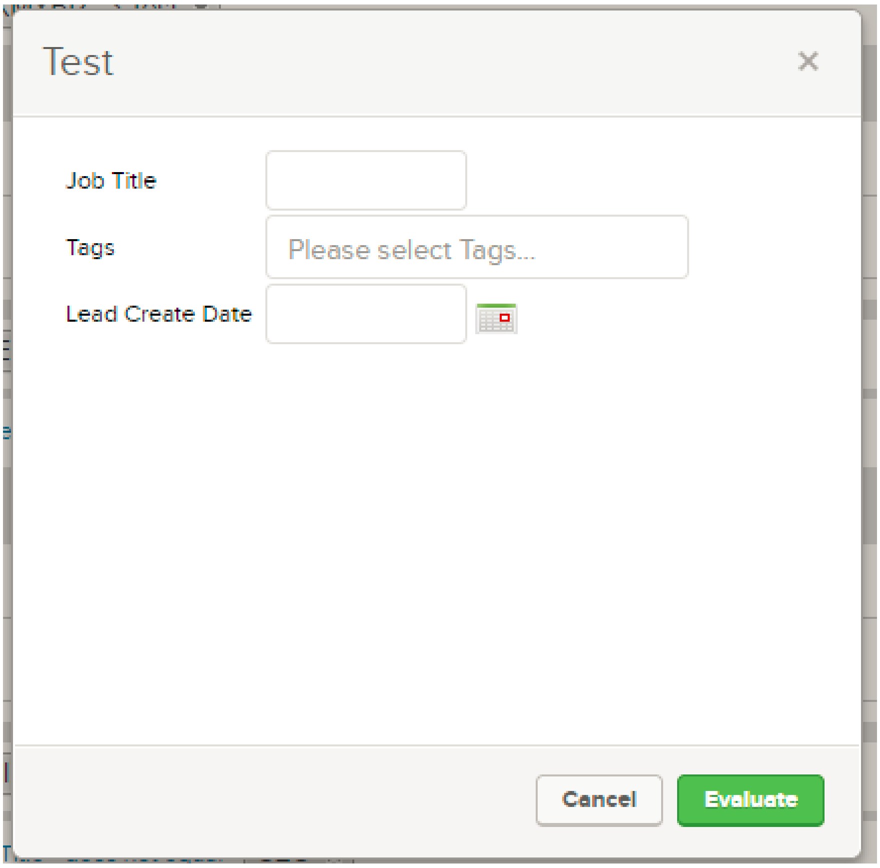
2. Set up decision diamond logic



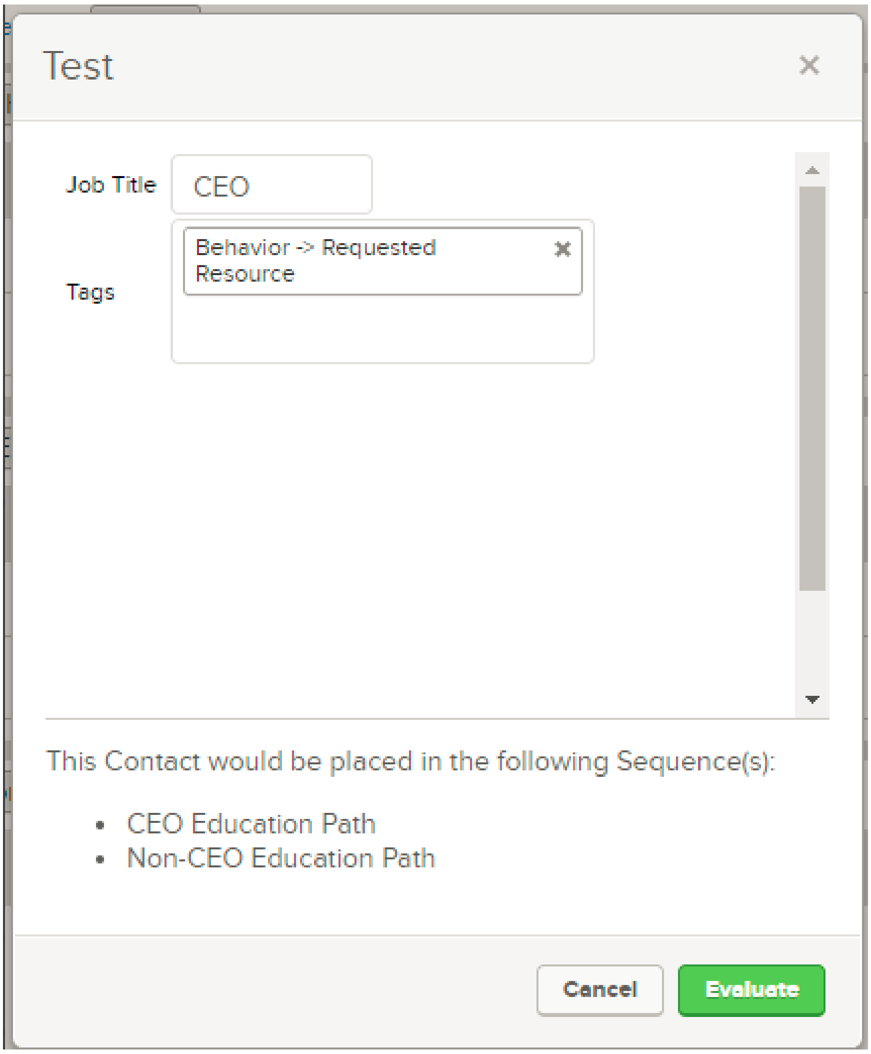
3. Hover over the 'Actions' button, in the top right corner of the screen, and click the 'Test' option



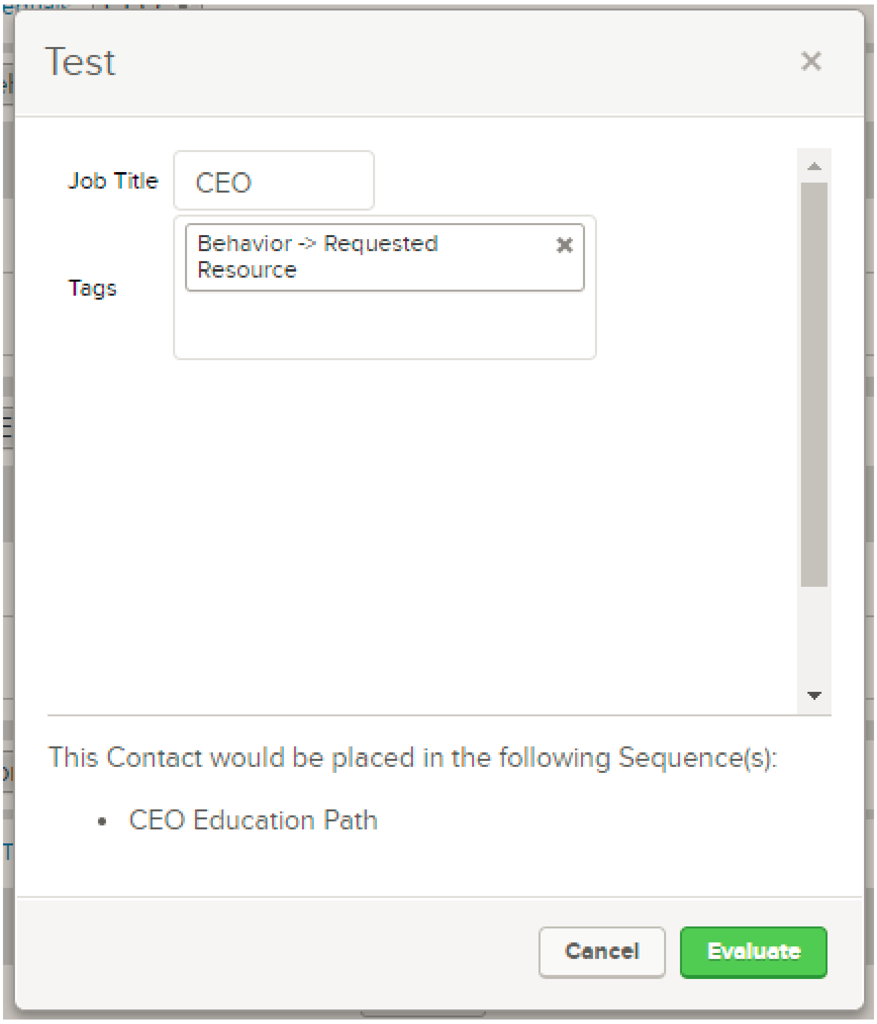
4. Fill in the associated fields, listed on the test form
   - Depending on if the logic is going off of Tags, Contact Fields, etc. you have the ability to test the logic
   - Decision diamonds can be as simple as operating on tags, and/or as advanced as using multiple criteria, to segment contacts



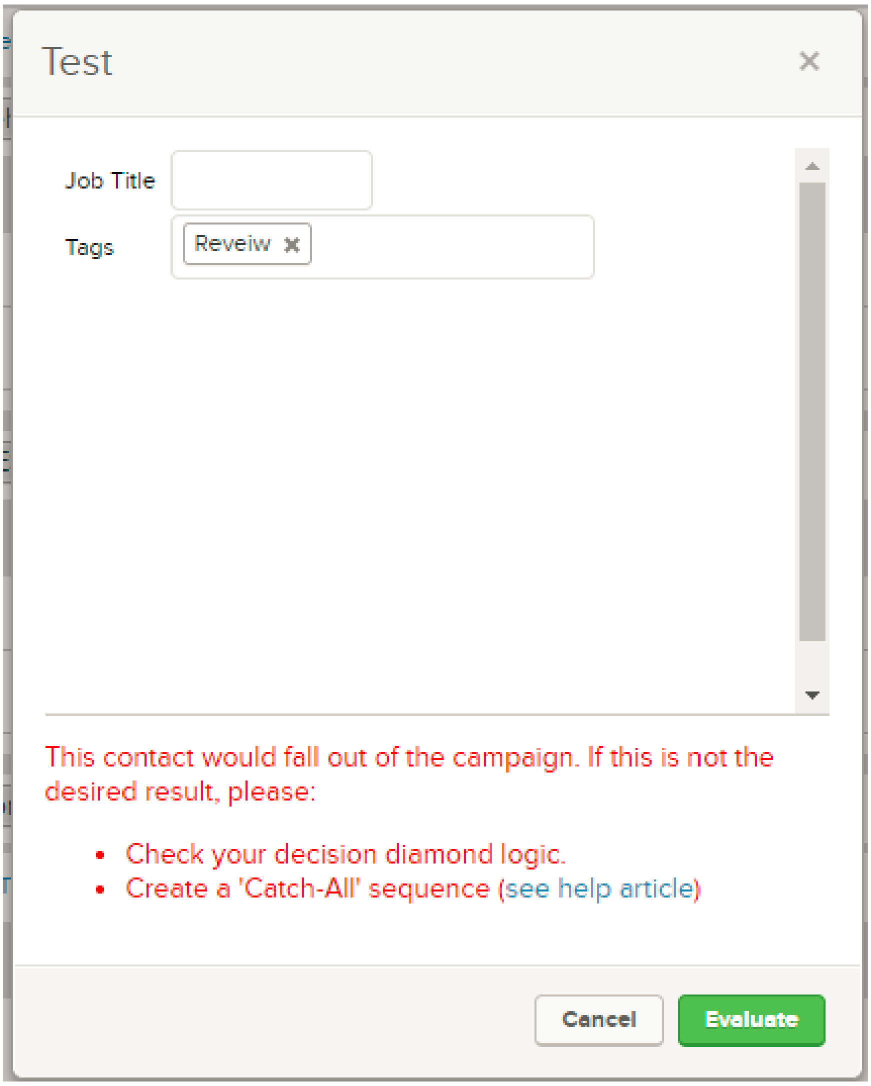
5. Click the Evaluate Button and view the bulleted list at the bottom of the form indicating which sequence the contact would enter into



This particular example (above) shows the contact would go into both the CEO and Non-CEO Education paths, which is not intended. So you would need to add appropriate logic to the Non-CEO path to ensure that anyone without the CEO title would go there. Once that logic is added, the test would now show this contact would appropriately go to the CEO Education Path.



6. If the contact would fall out of the campaign, there is a warning that lets you know the contact would fall out and to:
   - Check decision diamond logic
   - Build a catch-all sequence, with a link to a help-article instructing you on how to create a catch-all sequence



Pro-Tip!: A 'Catch-All' sequence is simply an empty sequence titled 'Catch-All' or 'Other', connected to the decision diamond, with no criteria rules, where all contacts will fall, to create a backup list of contacts, that have passed through the decision diamond. Having this in your campaign allows you to keep contacts in their current place in the campaign, while keeping a backup list of all contacts that passed through the decision diamond. This will allow for you to review any contacts that may not have met the criteria set, for another sequence.

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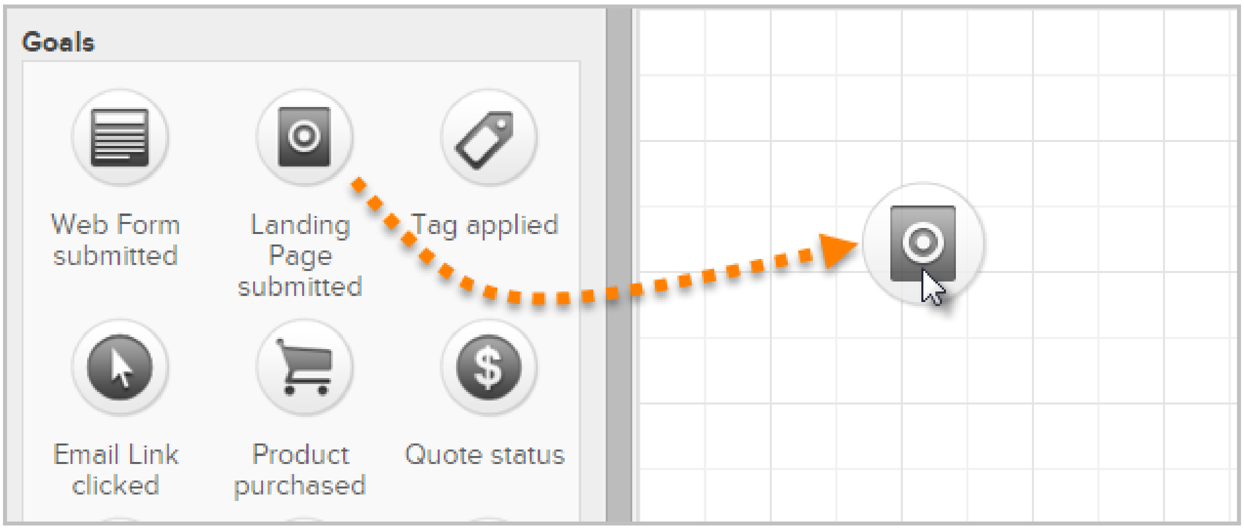
Campaign Walkthrough Part 1 - Capture Leads

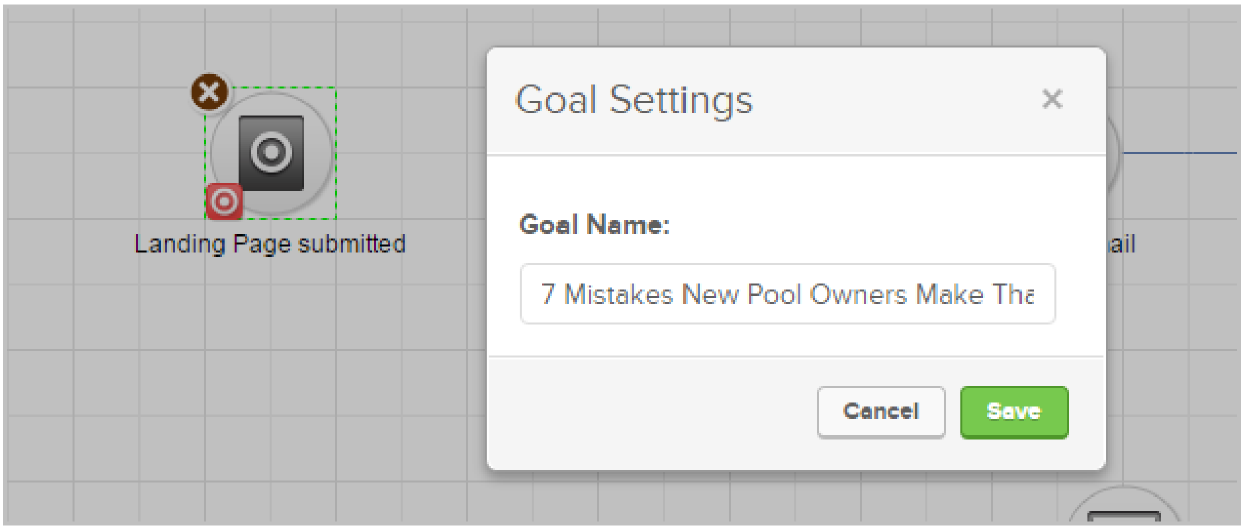
Last Modified on 10/02/2018 2:59 pm MST

We will capture prospects with a Landing Page, offering a free report titled, "**7 Mistakes New Pool Owners Make That Cost Them Money**." In exchange for their email address, we will provide to them a free PDF document.

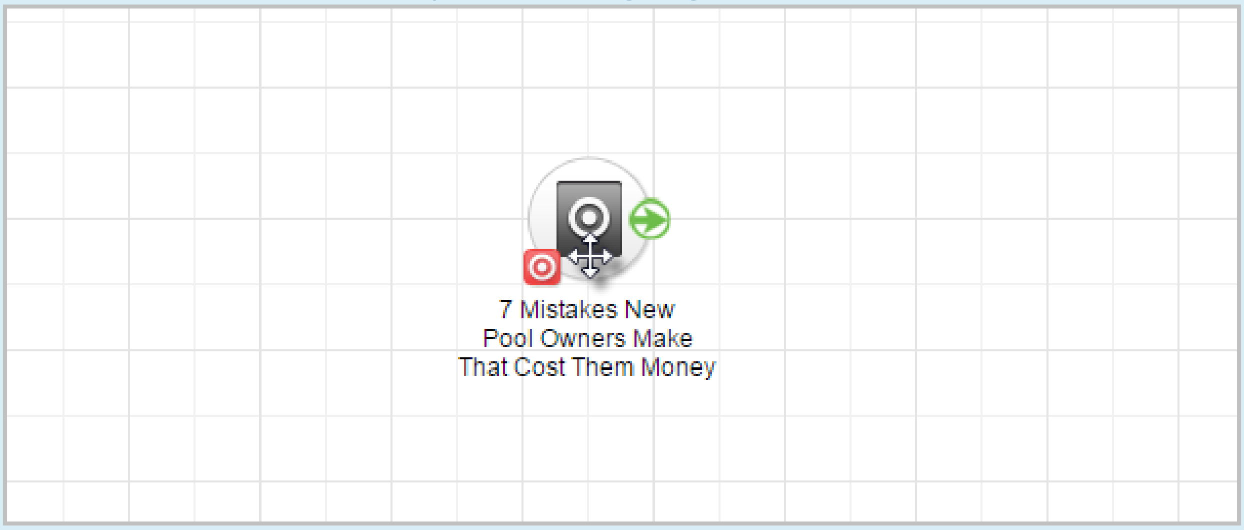
1. Drag the Landing Page Goal onto the campaign canvas.



2. Name it "7 Mistakes New Pool Owners Make That Cost Them Money" (or whatever you wish) and click **Save**.

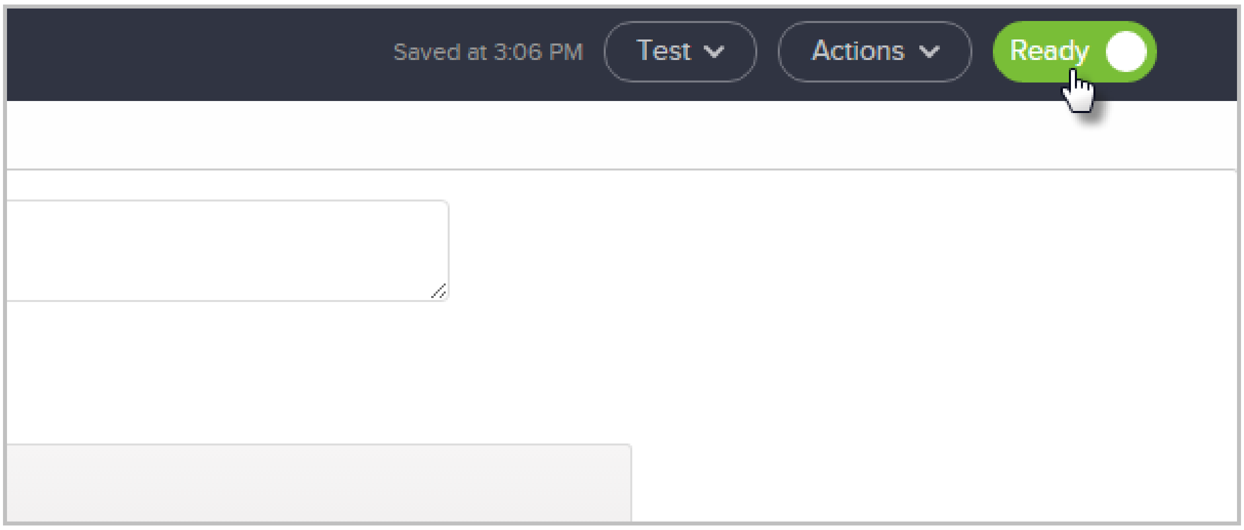


3. Double-click the Goal to setup the Landing Page

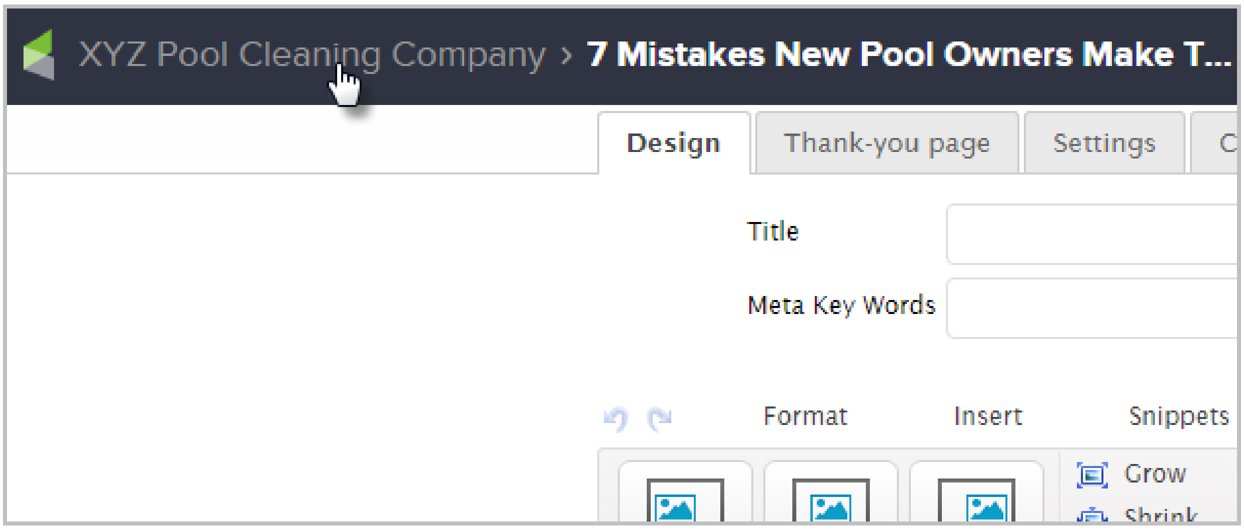


Pro-tip! Double-click the name of the web form and hit the enter key on your keyboard to break to the next line.

4. After customizing the Landing Page, toggle the form to**Ready** by clicking on the slider.



5. Now click the **Back to Campaign** button.



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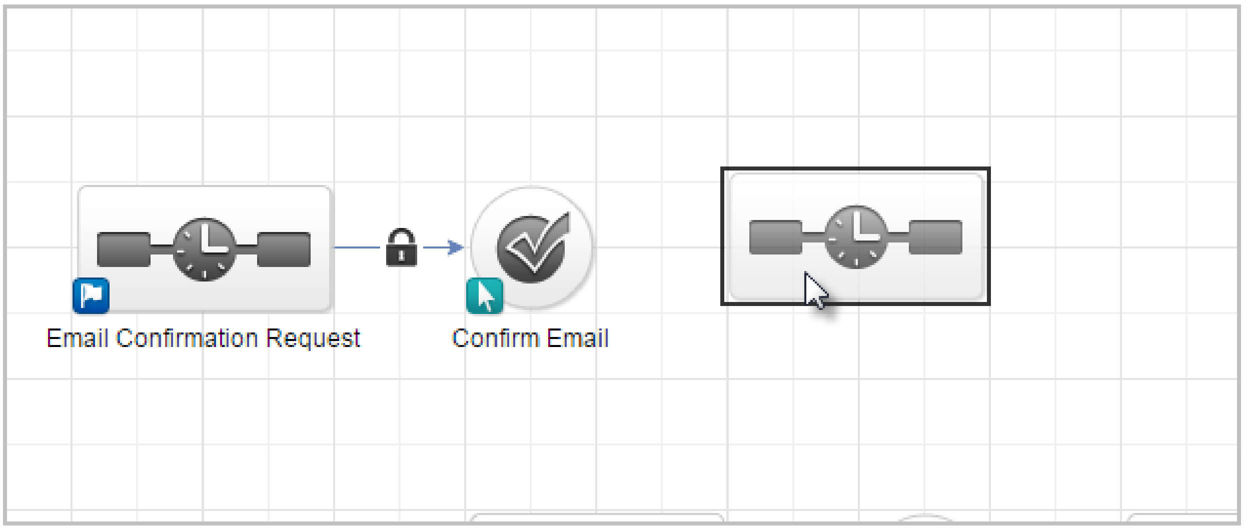
Campaign Walkthrough Part 2 - Nurture Prospects

Last Modified on 07/23/2018 1:15 pm MST

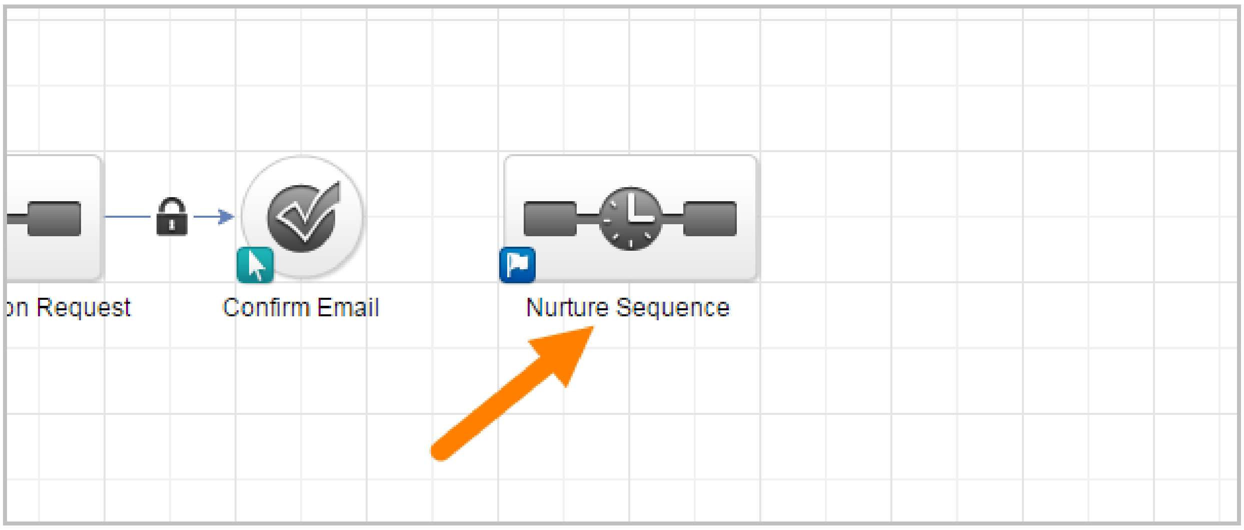
Now that we have a web form goal, let's connect it to an automated sequence.

1. Drag an Email **Confirmation** onto the canvas to the right of the landing page.

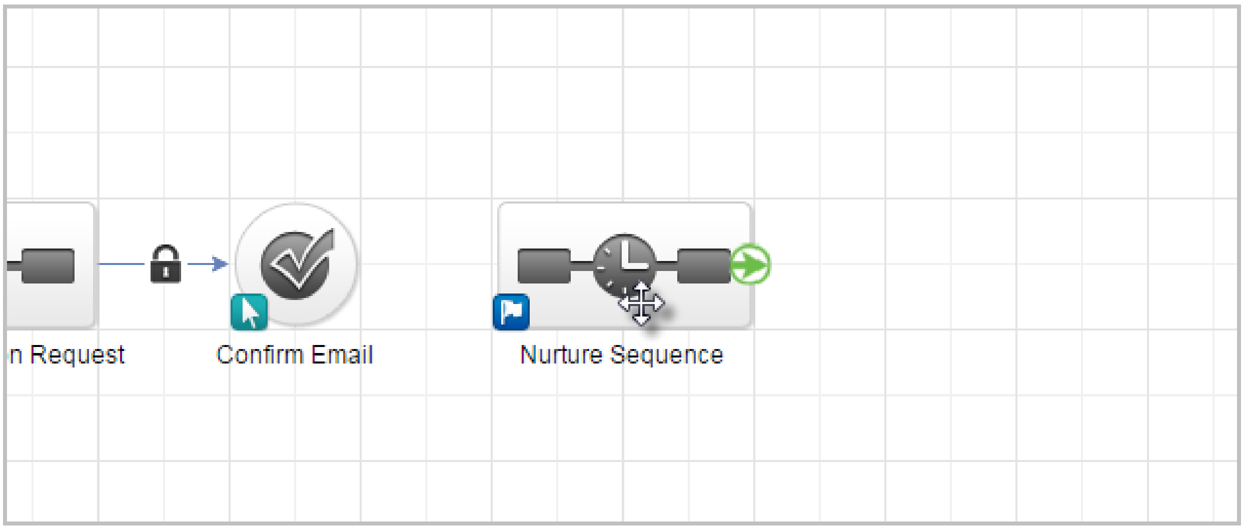
2. Now, click and drag a **Sequence** to the right of the Email Confirmation.



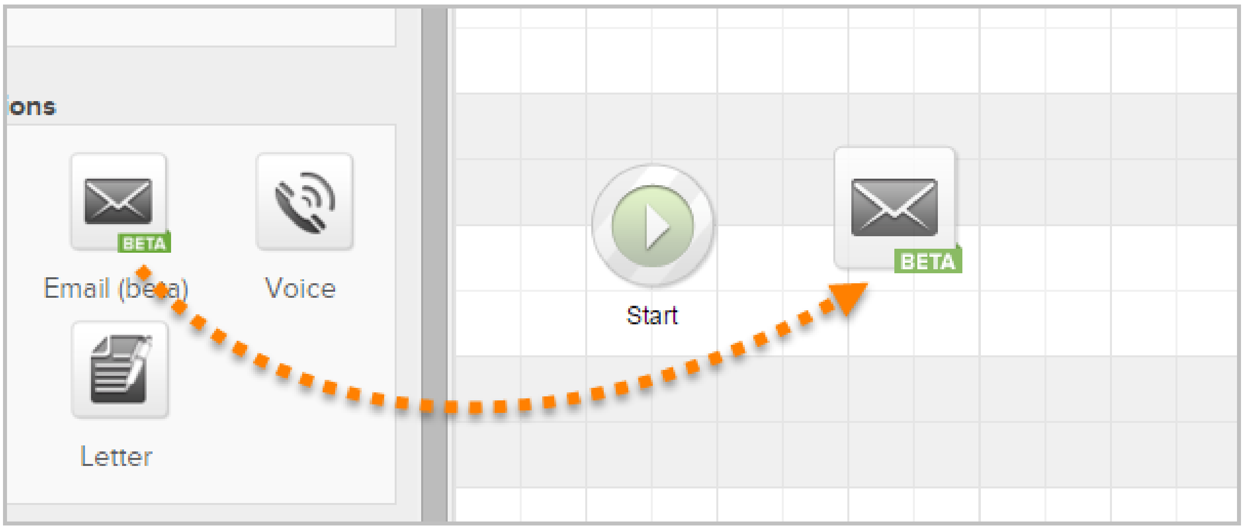
3. Rename the sequence, "Nurture Sequence."



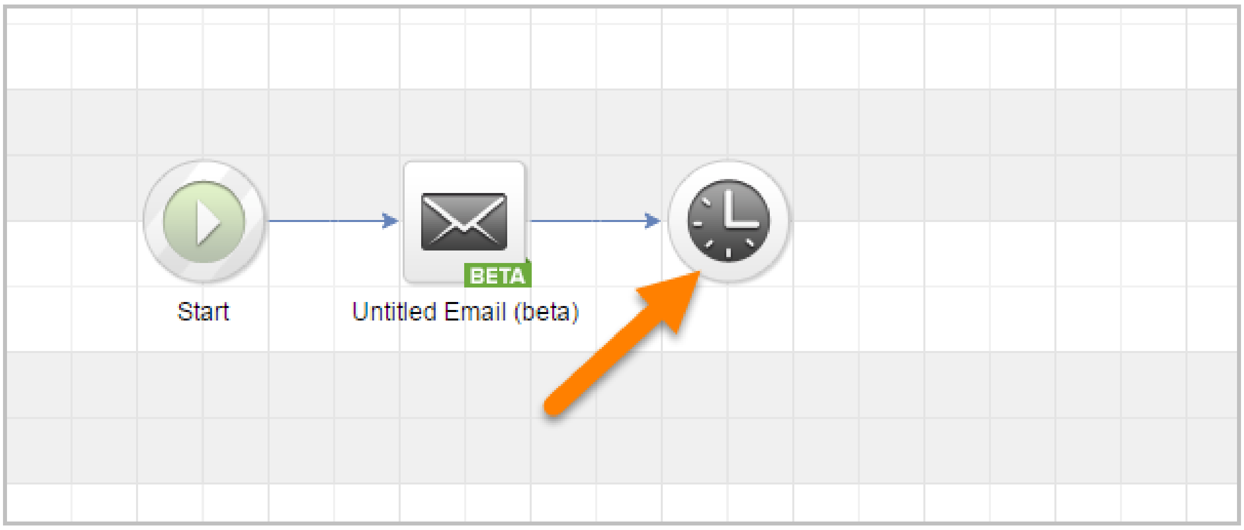
4. Double-Click the **Nurture Sequence** icon.



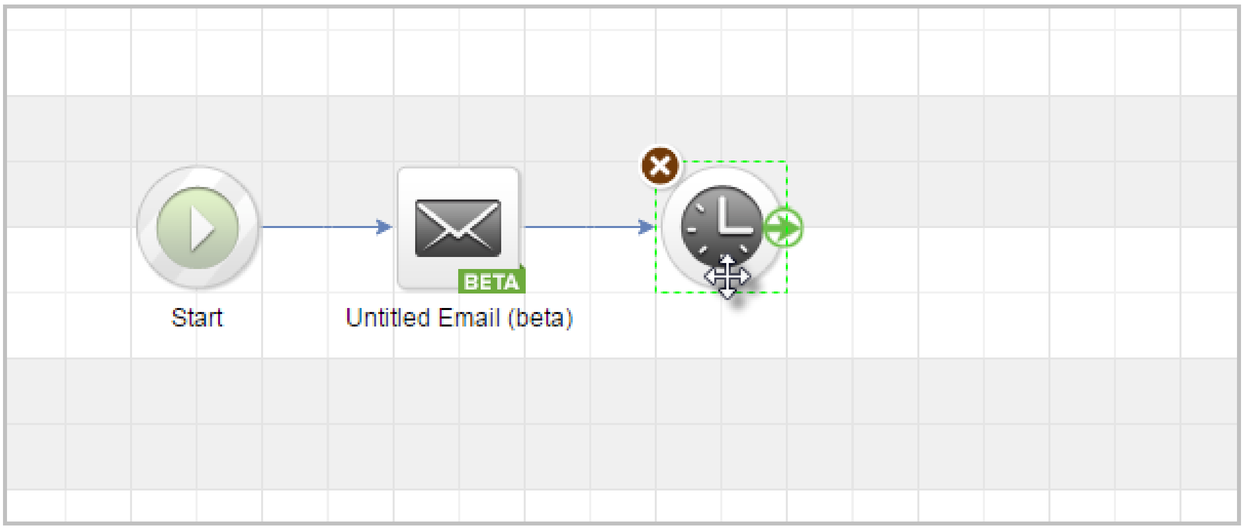
5. You are now viewing the campaign sequence canvas. Click and drag an **Email** to the right of the Start icon. This email will go immediately when someone submits the web form (accomplishes the goal.)



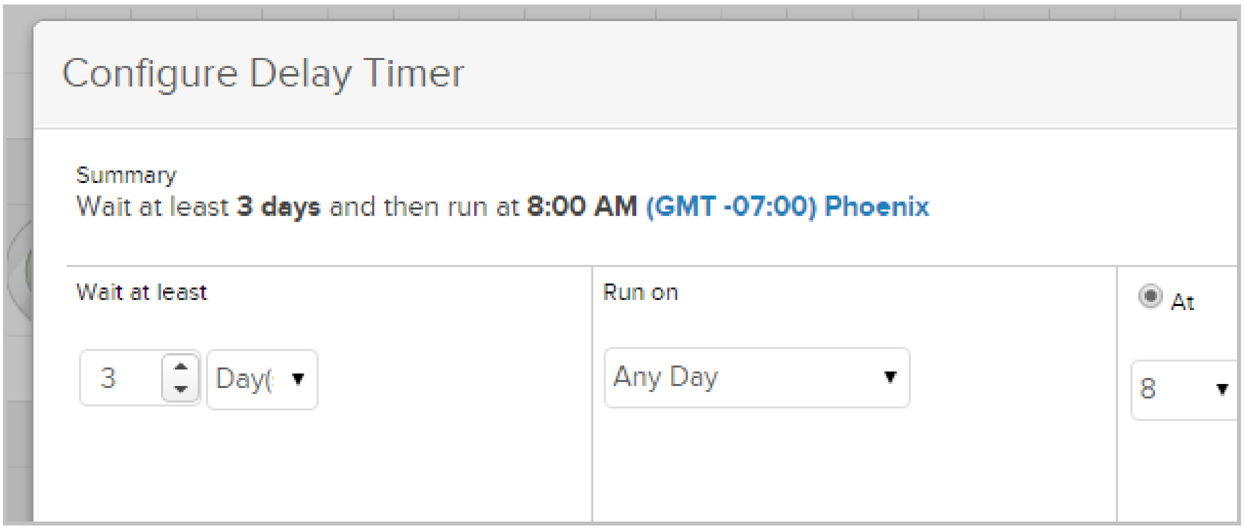
6. Click and drag a **Delay Timer** onto the canvas to the right of your email.



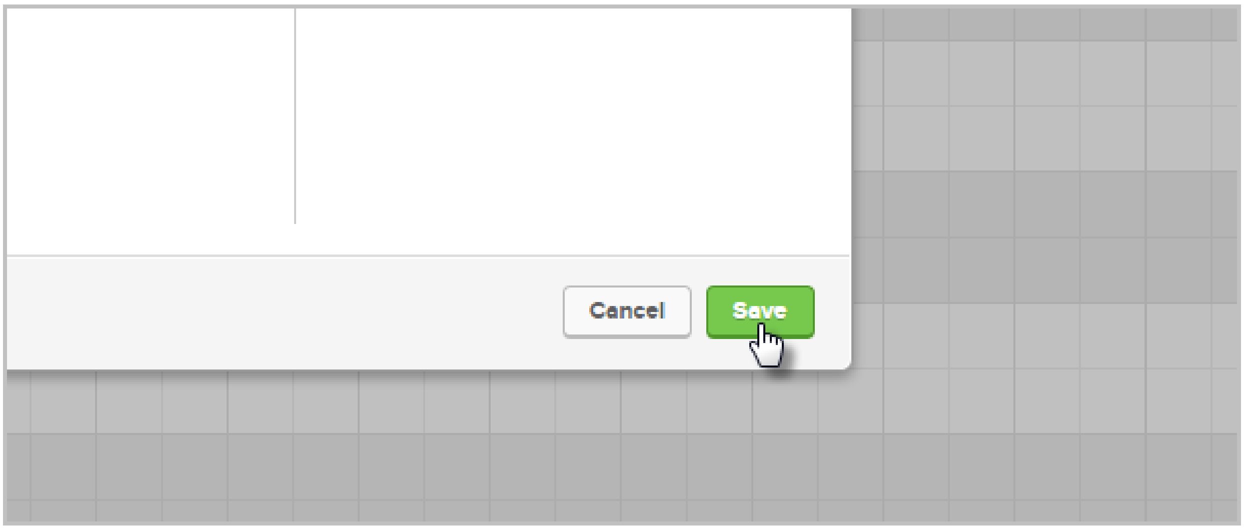
7. Double-click the **Delay Timer** icon.



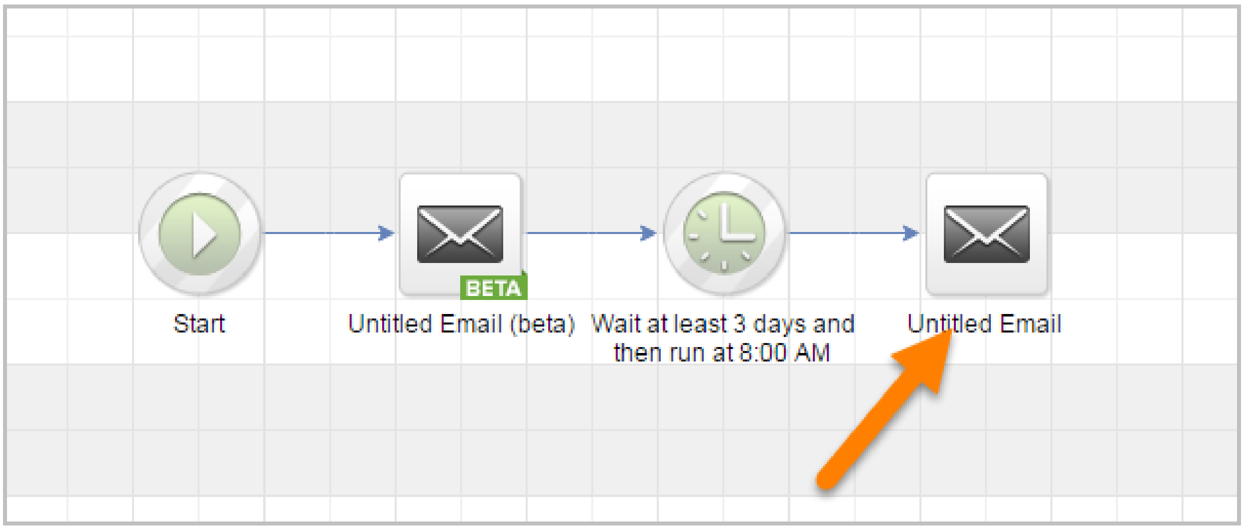
8. This email will run 3 days after the goal is accomplished on any day of the week. You can configure the timer by clicking on the drop-down fields and selecting your parameters.



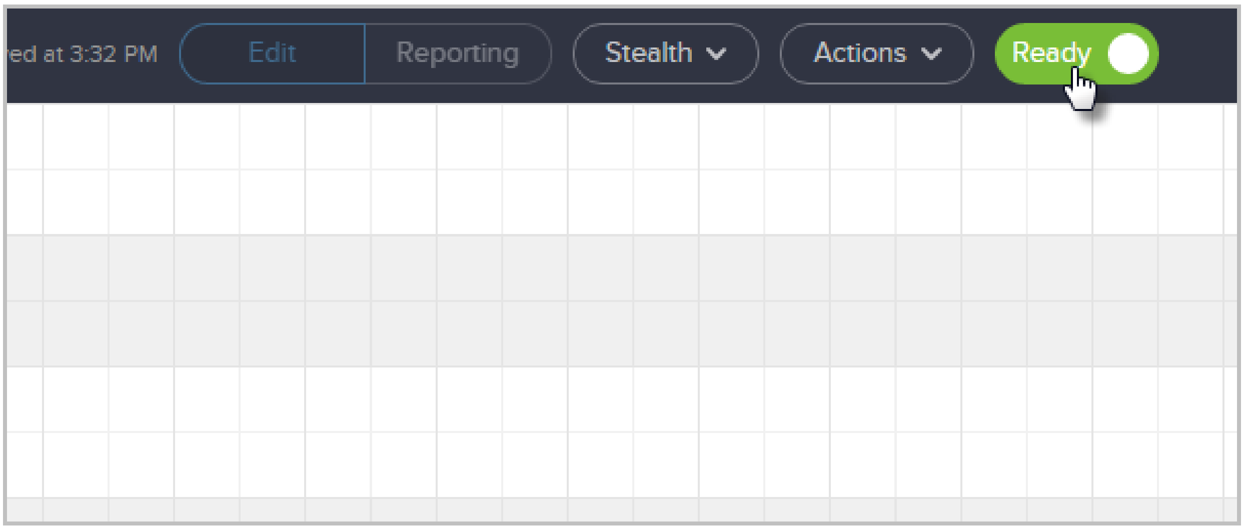
9. Click the green **Save** button when you are finished configuring the timer options.



10. Click and drag another email onto the canvas to the right of the Delay Timer. This email will be sent according the timer you created in the previous step. You can continue to add timers and communications to build out your nurture sequence.



11. When you are done configuring your sequence, mark the sequence as **Ready**.



12. Click **Back to Campaign**.


XYZ Pool Cleaning Company › Nurture Sequence
Sequence Tools
Leave Feedback
Timers
Delay Timer
Date Timer
Field Timer
Communications

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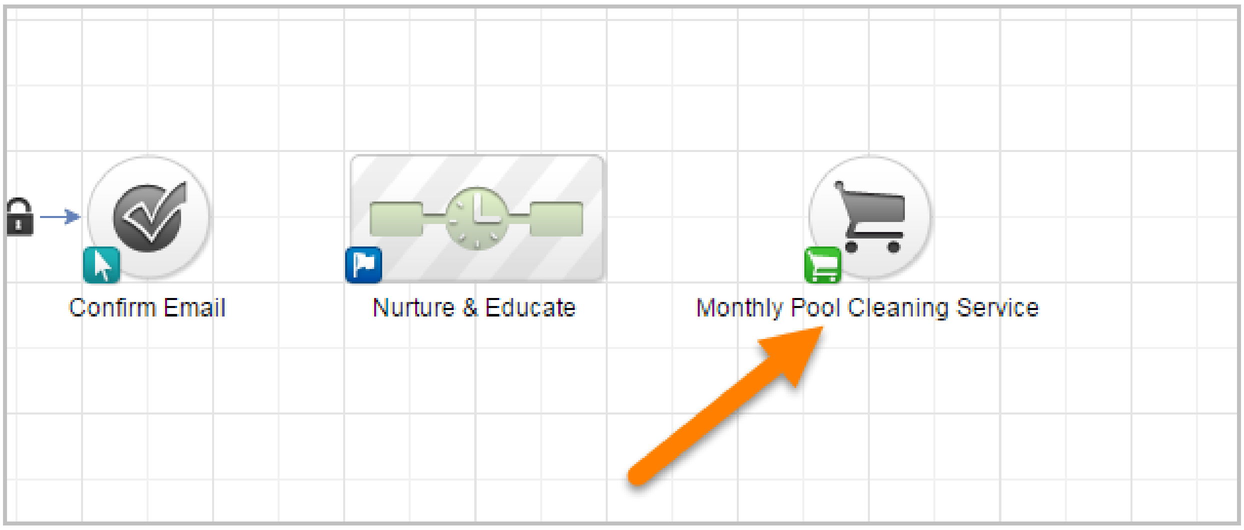
Campaign Walkthrough Part 3 - Convert Sales

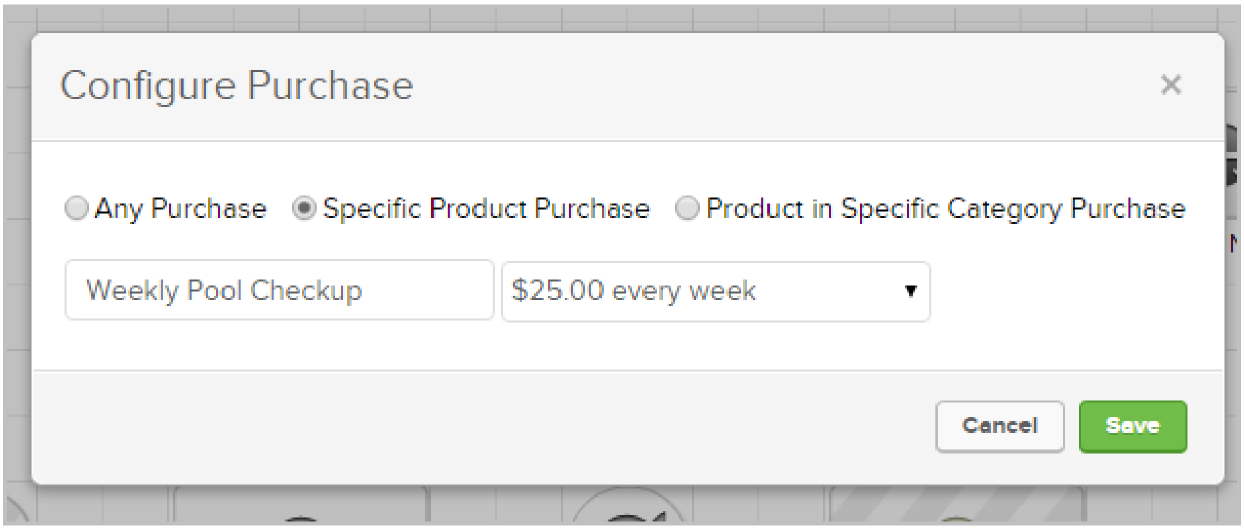
Last Modified on 07/23/2018 1:16 pm MST

Let's convert the prospect into a customer.

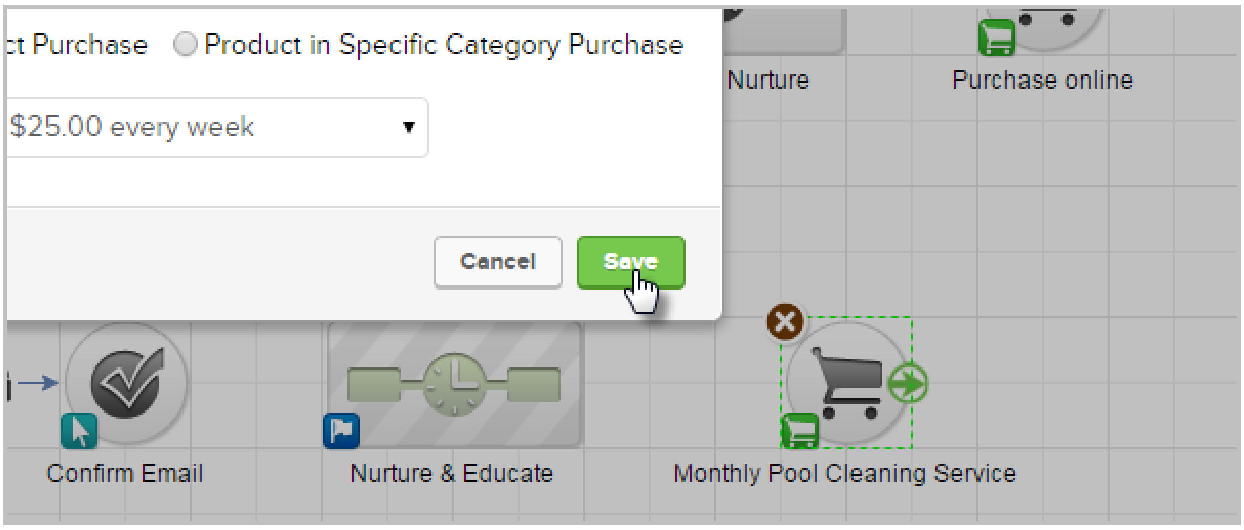
1. Drag a Product purchased goal onto the campaign canvas to the right of the Sequence and give it a name



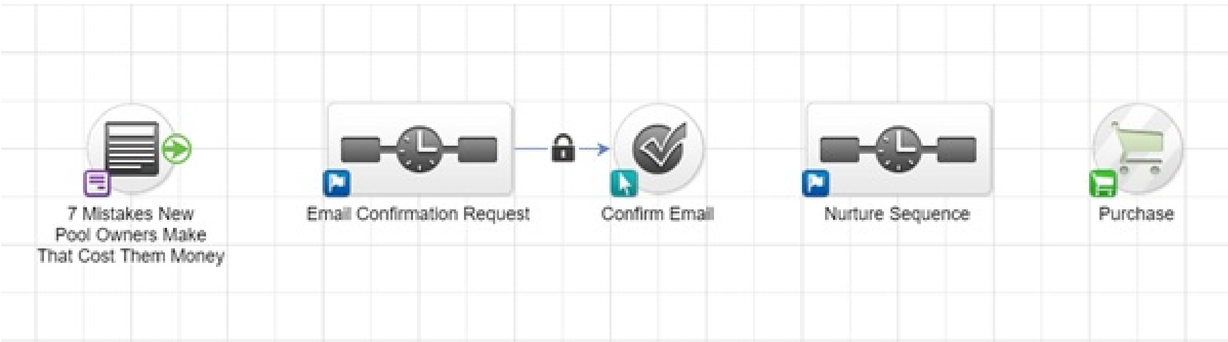
2. Double-click the goal and set up the purchase goal. In this example, the goal is satisfied when they purchase a specific service



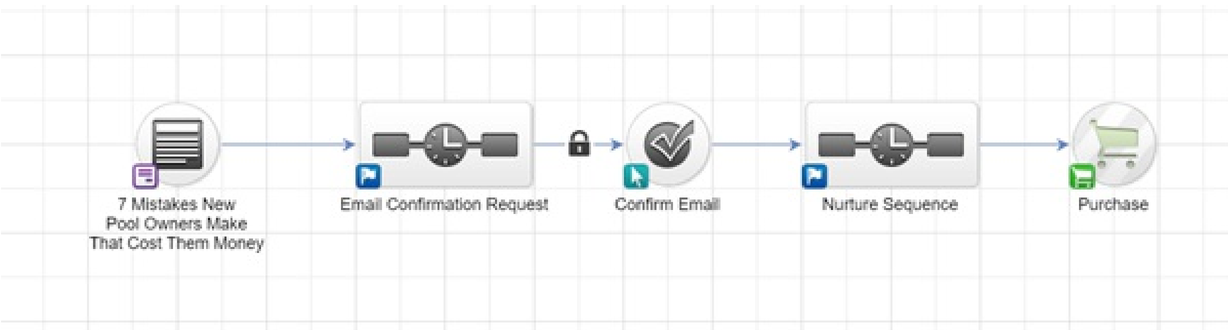
3. Click **Save**



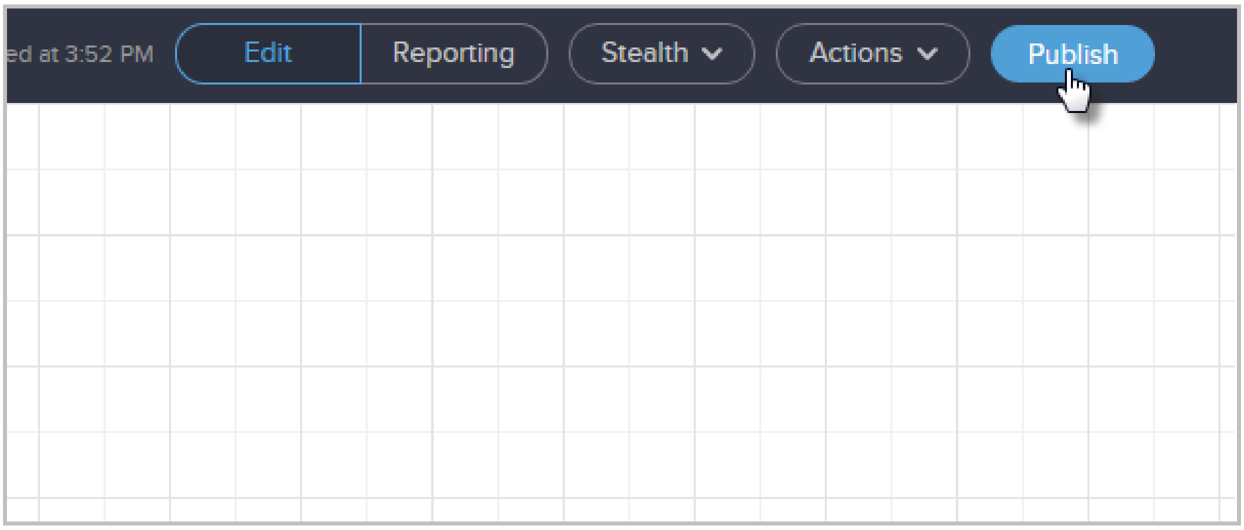
4. Your campaign should look similar to this image below:



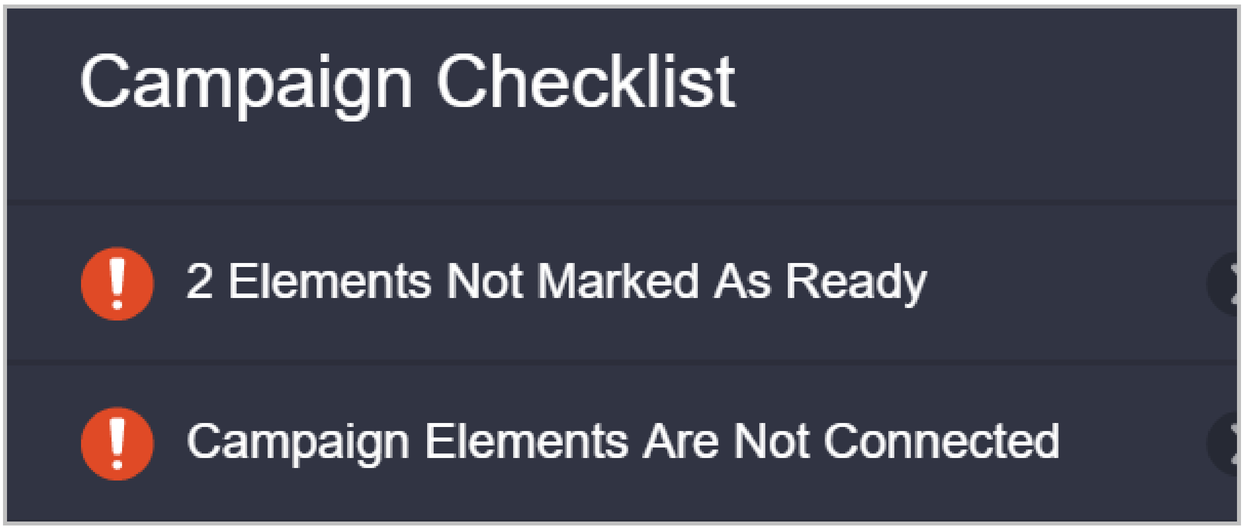
5. Connect the campaign elements together. When you hover over a goal icon you will see a green arrow icon. Click the green arrow and drag it over to the object on the right.



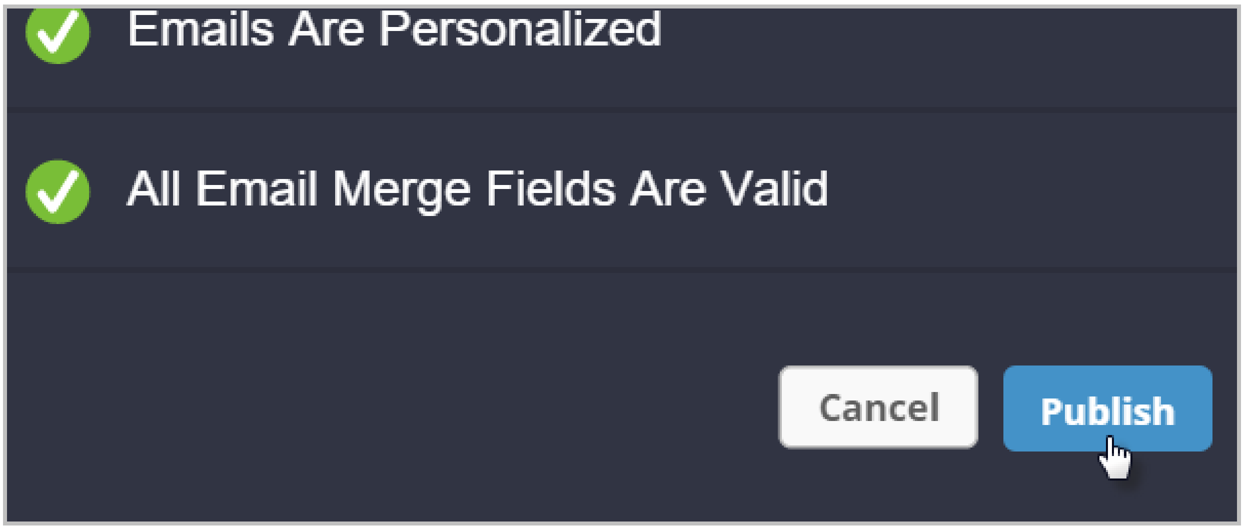
6. Publish the campaign by Clicking on the **Publish** button at the top right of the campaign canvas.



7. The Campaign Checklist will validate your campaign and let you know what needs to be fixed before the final publish. Whenever you make changes to the campaign, you will need to publish your changes in order for them to "go live."



8. After correcting any mistakes, click Publish again to "go live" with your campaign. Congratulations! You just built your first basic campaign. Next, you'll want to learn how to build more sophisticated automation and how to customize the look and feel of your web forms and emails.


Emails Are Personalized
All Email Merge Fields Are Valid
Cancel
Publish

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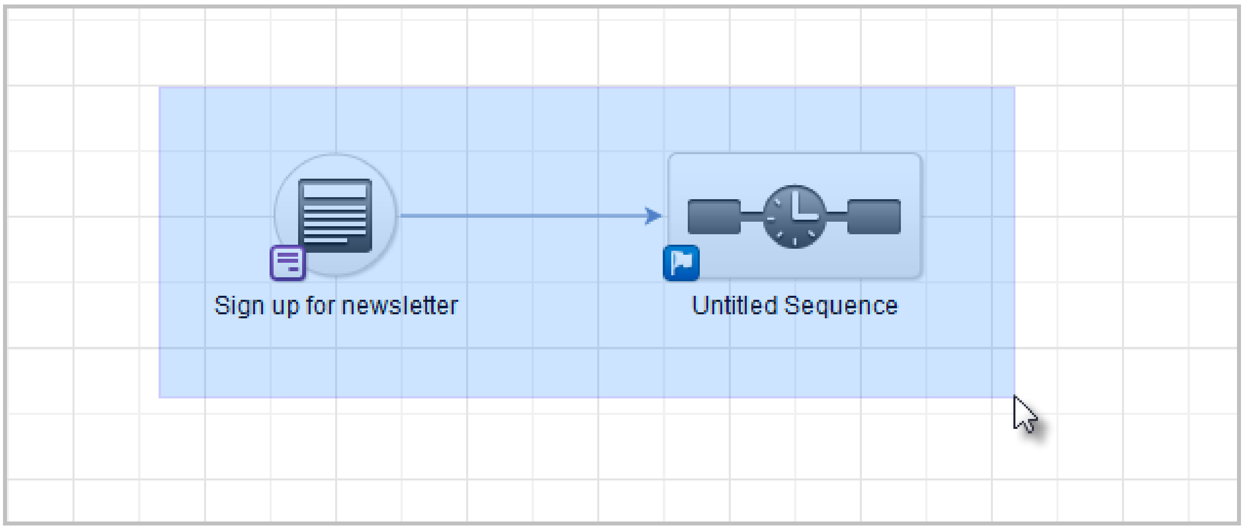
Clone Campaign Content

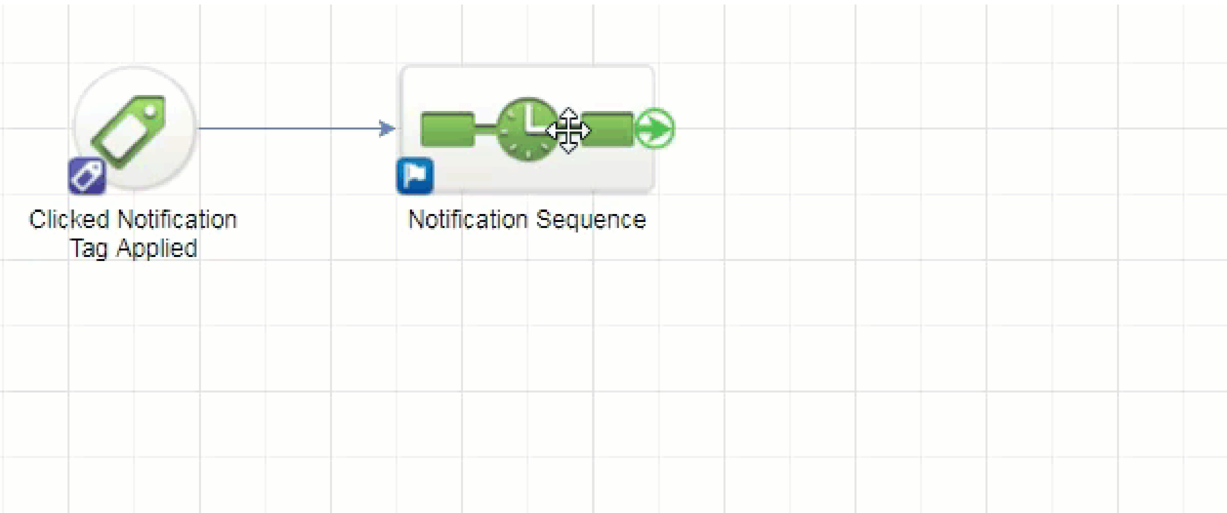
Last Modified on 07/23/2018 1:16 pm MST

To copy and paste elements from within a campaign...

1. Left click your mouse and select the objects you want to copy

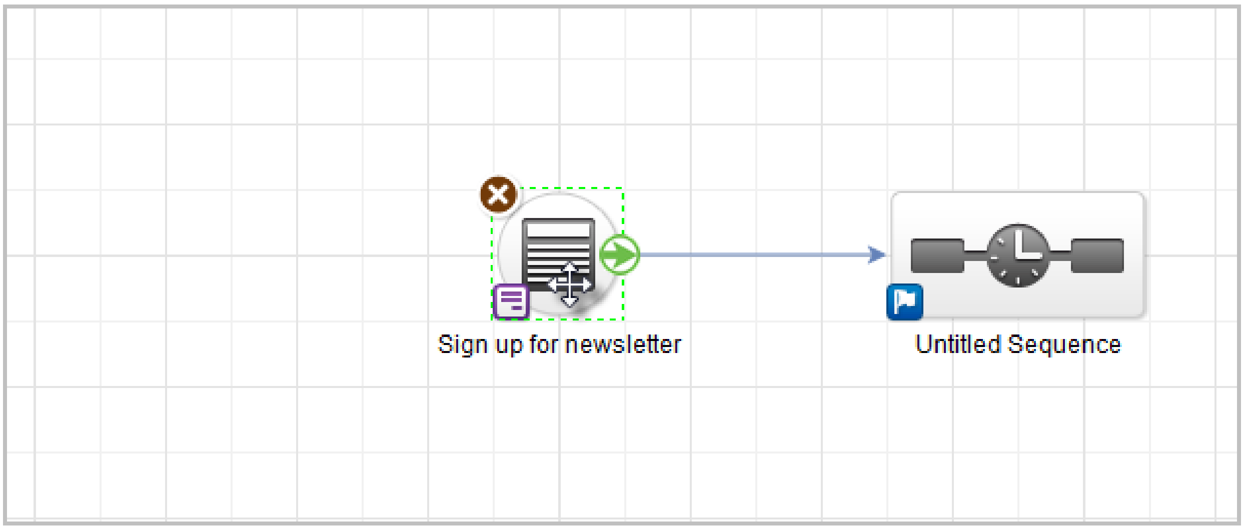


2. Once items are selected, right-click on one of the selected elements, and choose the option to 'Duplicate'

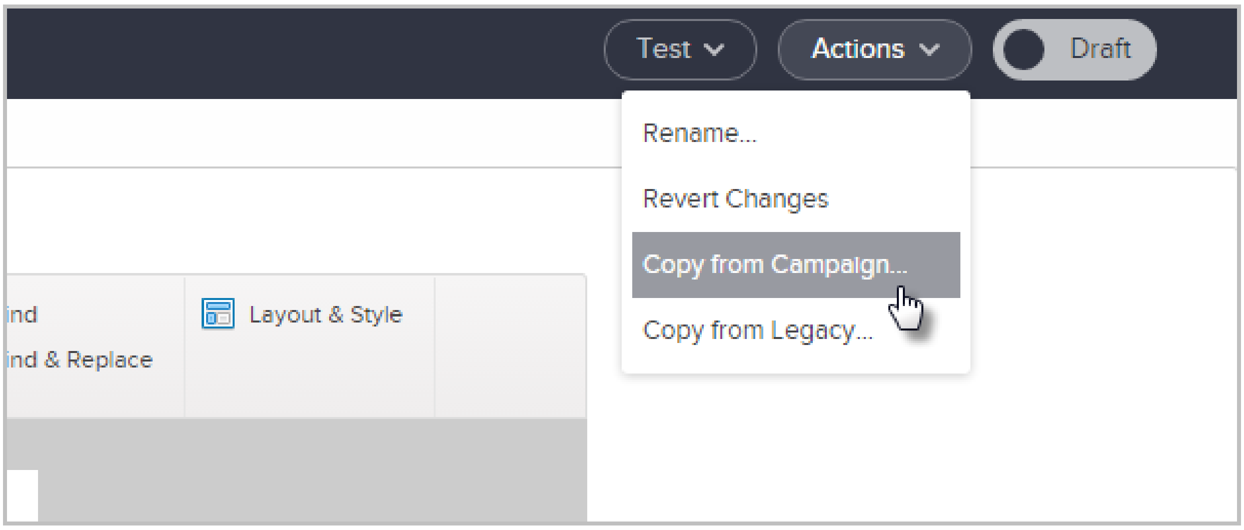


To copy an element from a separate campaign...

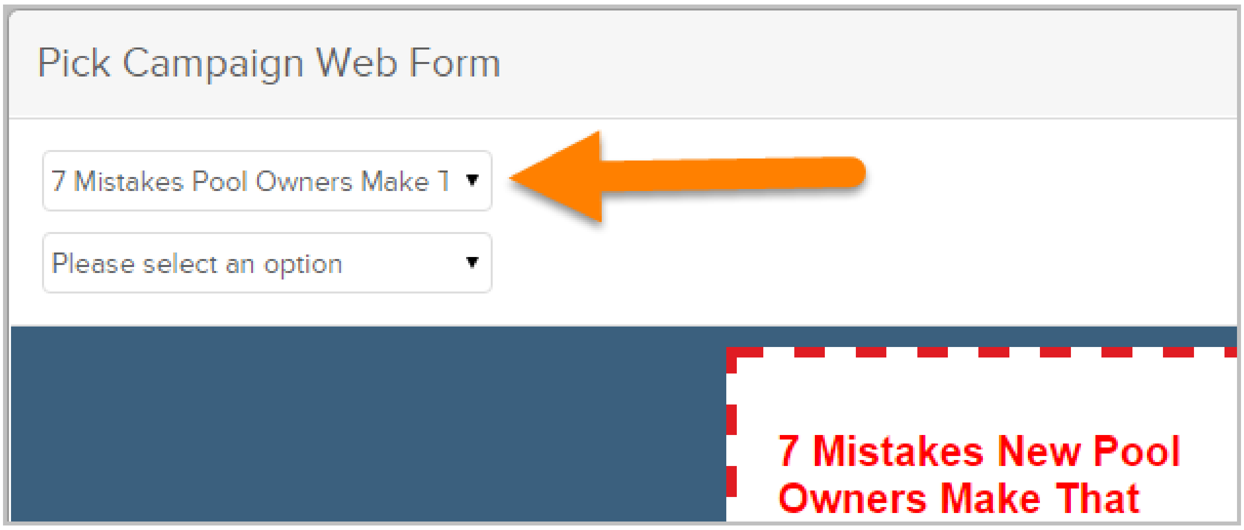
1. Double-click a goal or sequence that you would like to duplicate from a separate campaign



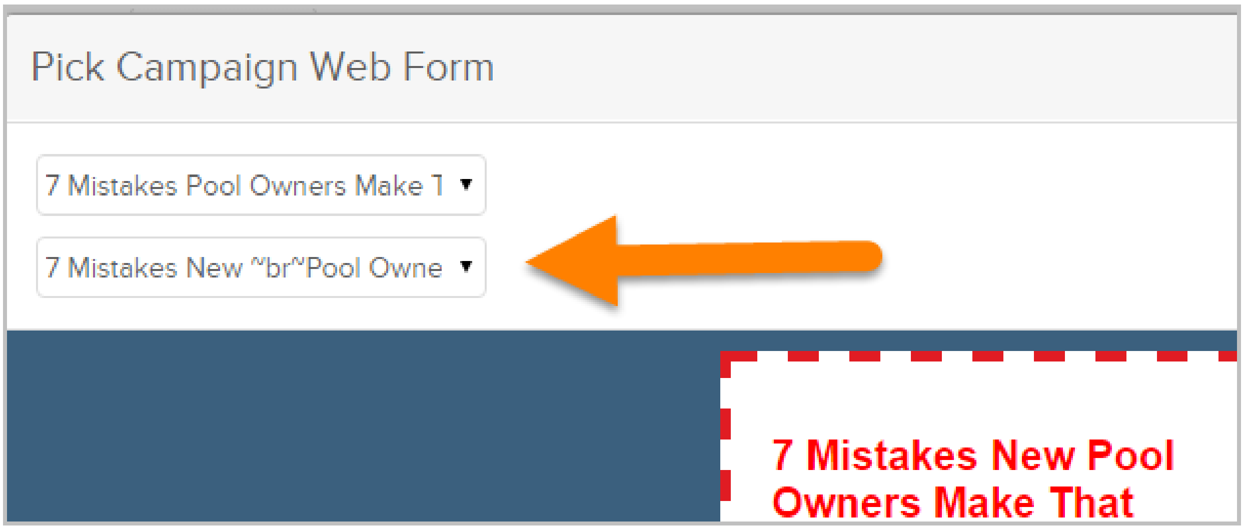
2. Once inside the element, select the drop down button located at the top left of the screen, and choose **Copy from Campaign.**



3. A light-box is presented allowing you to select from a list of existing campaigns.



4. Once a campaign is selected, a second drop down is presented allowing you to choose a sequence or specific goal within the campaign.



5. After a specific goal or sequence is selected, it is copied over, overwriting what previously existed.

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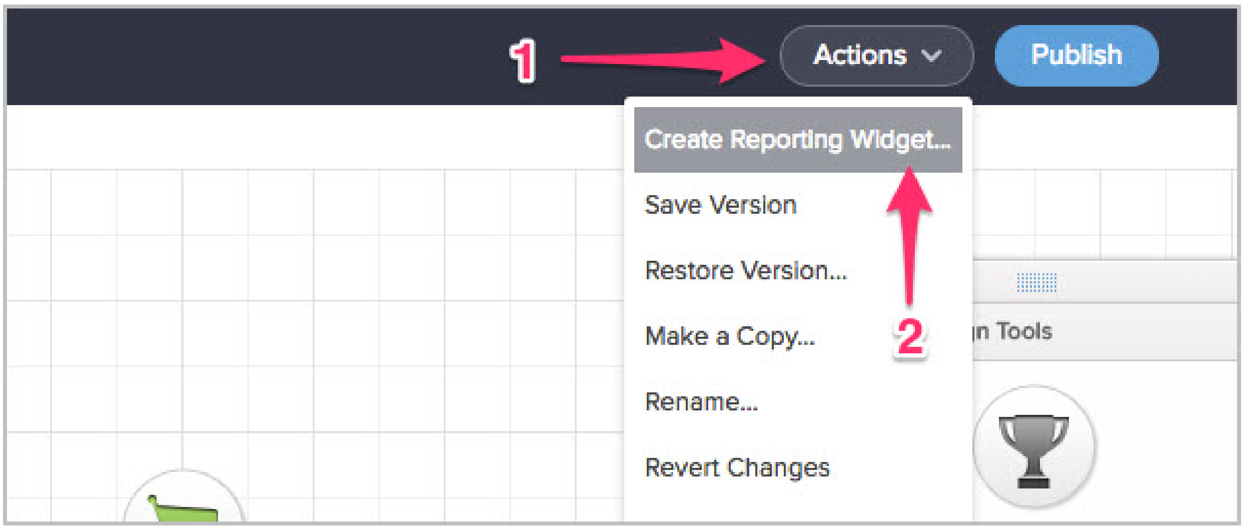
Rename, Restore And Unpublish Campaigns

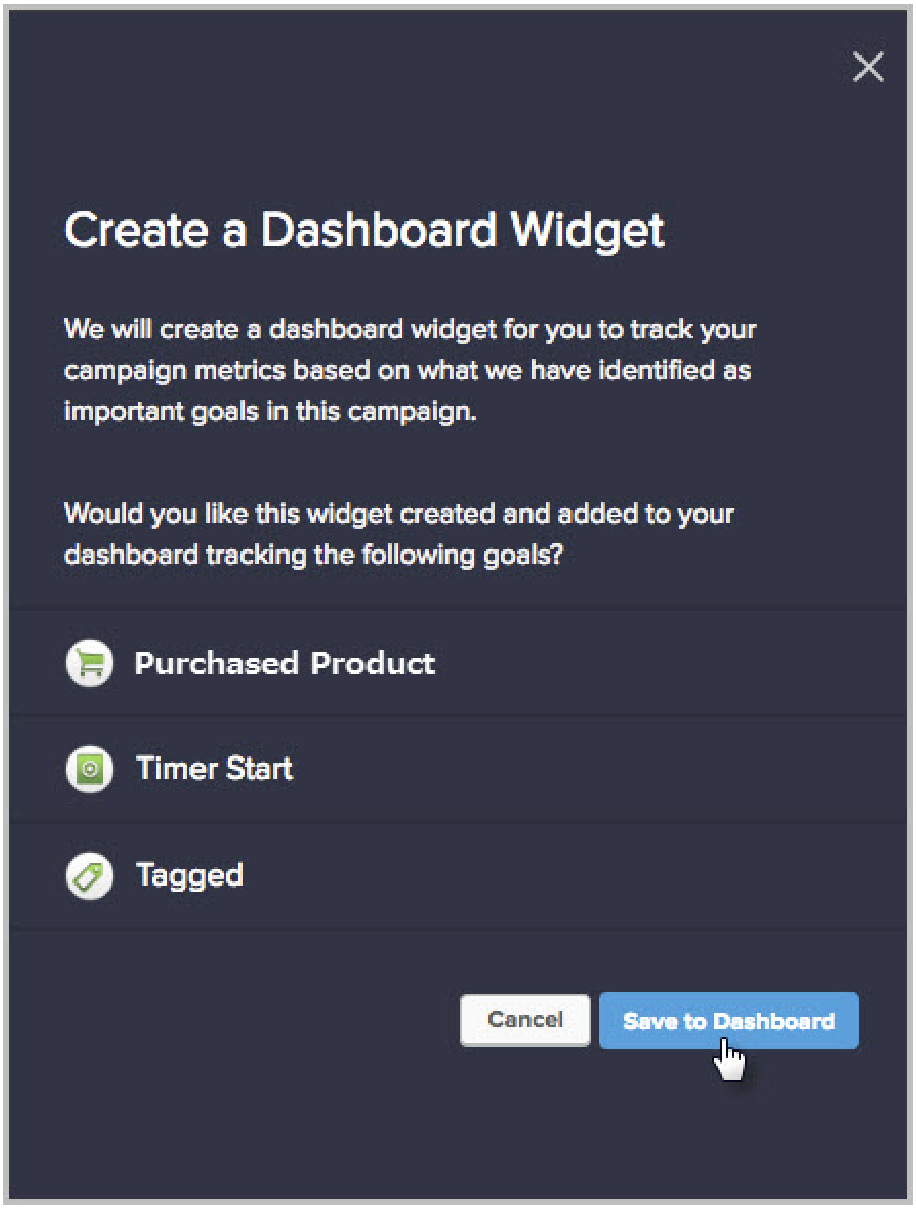
Last Modified on 07/23/2018 1:19 pm MST

Create a Campaign Dashboard Widget to Gain Insight into Your Campaign

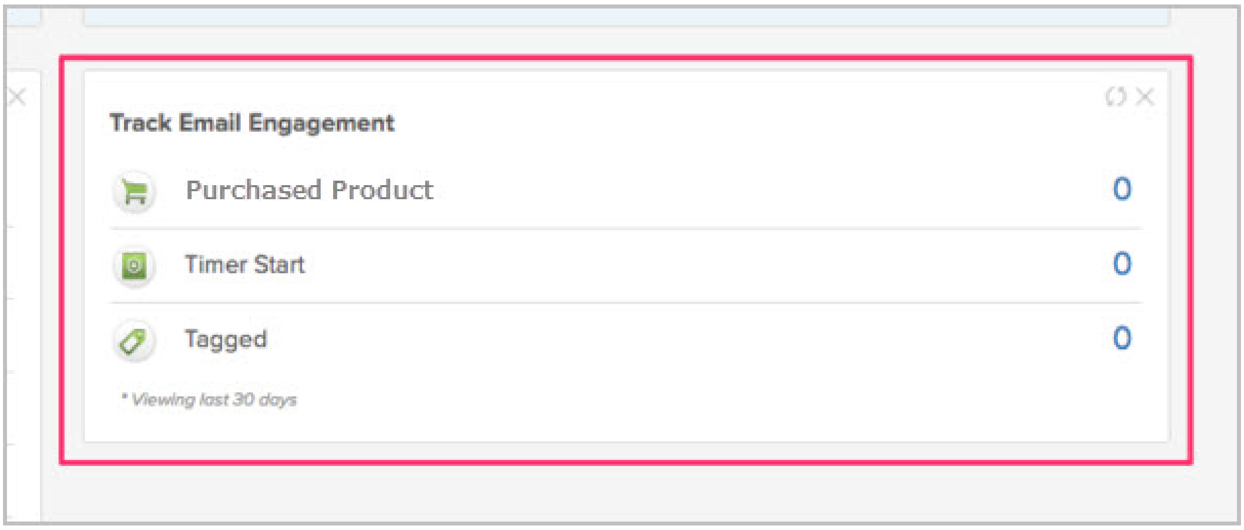
1. Open a campaign that you have already published
2. On the top-right of the canvas, click on the **Actions** button and select the first option, **Create Reporting Widget...**



3. Click **Save to Dashboard**

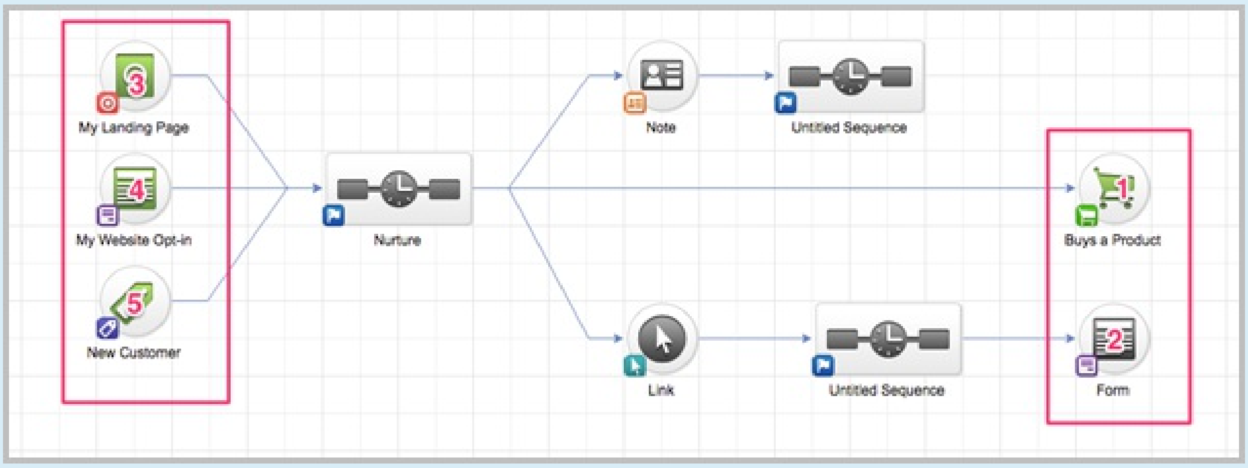


4. Your new Widget will be available on your Dashboard



Pro-Tips! Infusionsoft will automatically pick the goals that will be added to the widget.

Infusionsoft will prioritize goals that are near the end of the campaign first (end goals), then prioritize those at the beginning of the campaign second (start goals.) Goals that are neither at the beginning or the end of the campaign will not be available on the Campaign Dashboard Widget. In this example, you will see how Infusionsoft prioritizes the 5 goals that appear in the campaign



There is a limit of 5 goals per widget

Save Version

The system automatically creates a version of each published campaign. You can also save a version whenever you wish. A version contains a snapshot of the campaign traffic sources, goals, sequences, and decisions. It is a good idea to save a version when you plan to modify it significantly by adding/removing goals and sequences. A version does not store previous content (e.g., landing page or sequence email content) or the decision point settings. Object configurations and content always reflect the most recent edits.

Restore Version

The versions are date stamped and stored so you can rollback the campaign to a previous version. You might decide to do this if campaign performance drops after you make significant changes to it. It is a good idea to save the current version of the campaign before you restore a previous version.

Make a Copy

This option creates a completely new campaign by copying the existing one. The edits you make to the new campaign will not affect the original. The new campaign is "unpublished" by default. If you create a new campaign, you will need to change form code and landing page links to begin using the new goal objects. You might make a copy of a campaign to speed up the process of creating a new campaign for a different audience (e.g. partners). The email, web form, and landing page styles and content from the first campaign are applied to the copy.

Rename

This option allows you to update a campaign name.

Revert Changes

This option allows you to "undo" the work from your current session. The revert option restores the campaign to the way it looked when you first opened it during this work session. You might need to revert a campaign if you accidentally delete campaign objects or make some other kind of significant mistake.

Print

This option sends the current version of the campaign to your printer.

Save as Image

This option allows you to save your campaign as a jpg image file

Merge Fields

Click here to learn more.

Links

Click here to learn more.

Deleting a Campaign

Be Careful! When you delete a campaign, it is permanently removed from your system and cannot be restored.

1. Go to **Marketing > Campaign Builder**
2. All of the campaigns are selected by default. Click on the top checkbox to deselect them, then mark the checkbox beside the campaign you want to delete.
3. Click on the **Actions** button and select **Un-publish and Delete**.
4. Confirm the number of campaigns selected and click on **Process Action** to confirm deletion.

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Campaign Merge Fields

Last Modified on 07/23/2018 1:21 pm MST

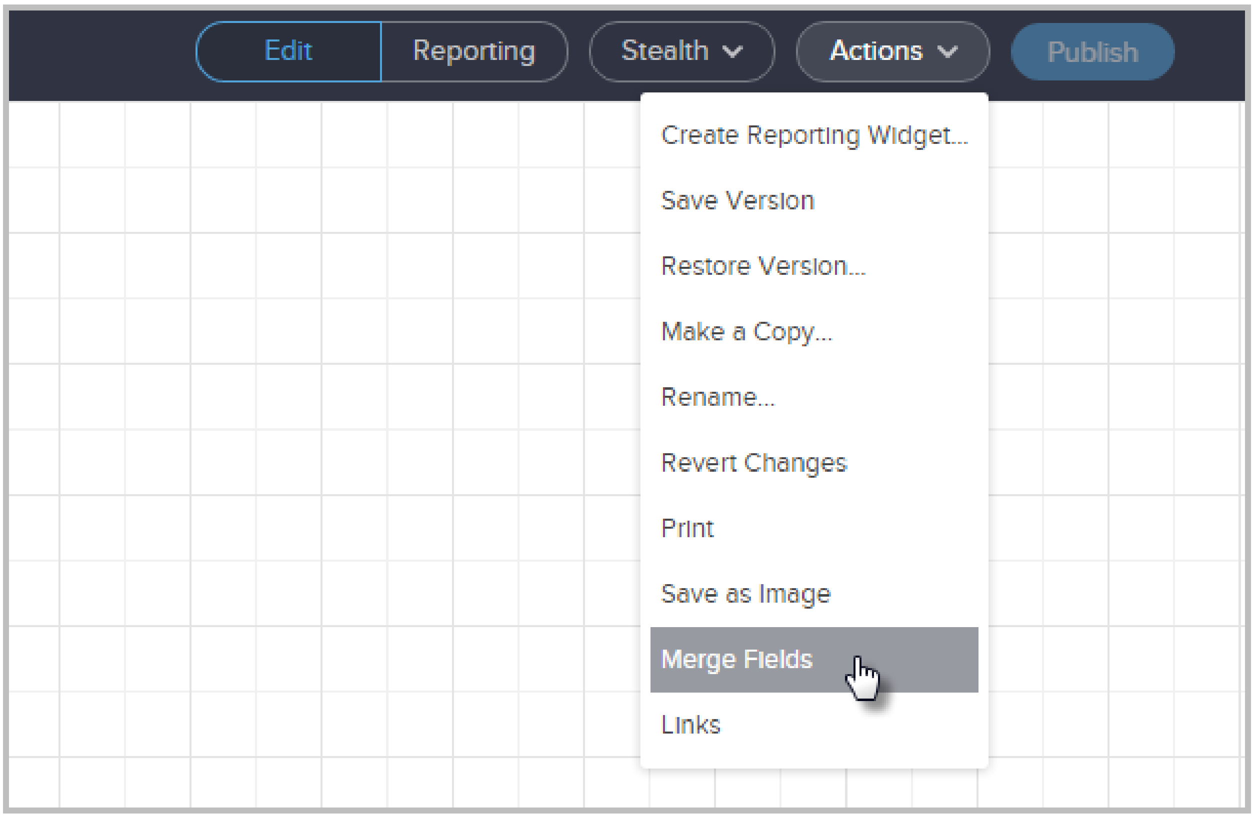
Campaign merge field s are useful time-savers when information in your campaign changes frequently. For example, if you have five emails in a campaign that all reference a constantly changing date, a campaign merge field will save you from editing all five emails every time the date changes; all you have to do is change the value of the campaign merge field.

Pro-Tips!

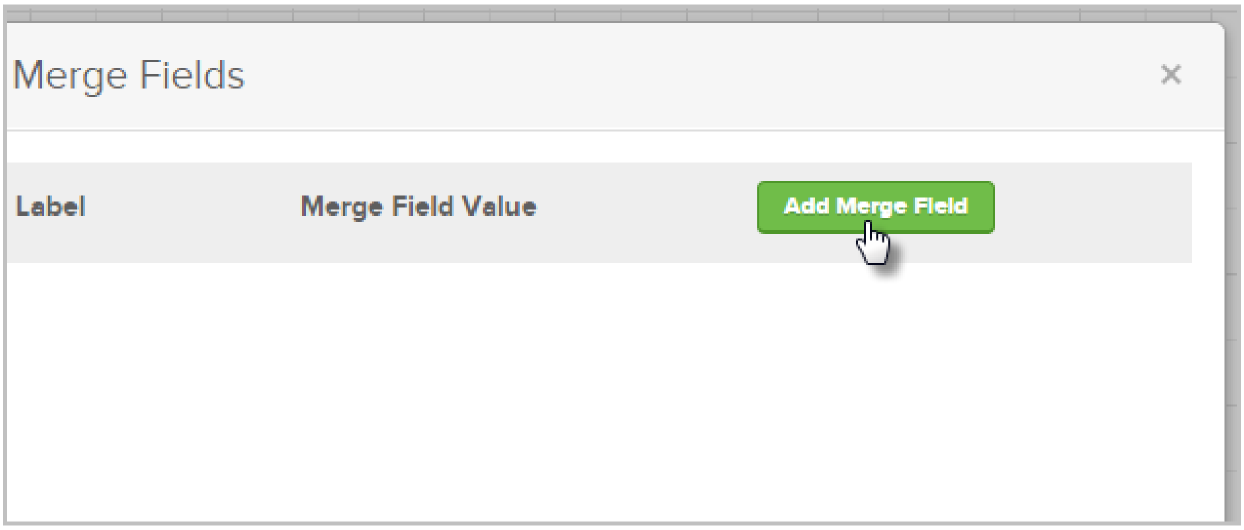
- The merge field can only be text
- There is no limit to the amount of campaign merge fields you can create
- A campaign merge can only be used in the campaign that it was created in
- Campaign merge fields are available to use in any email from the campaign that it was created in

Create a Campaign Merge Field...

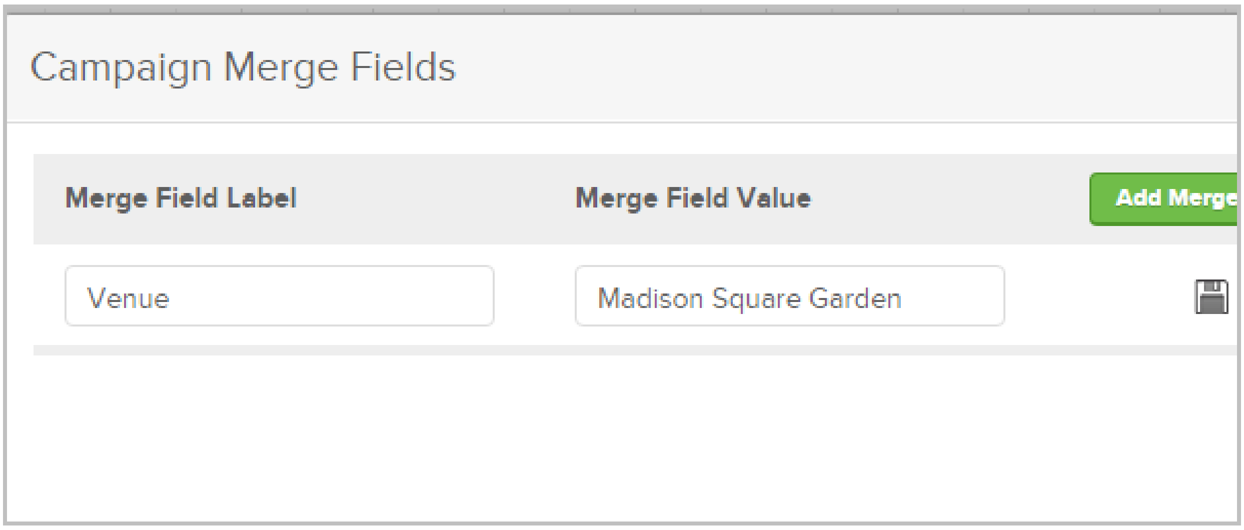
1. While inside your campaign, click on the **Actions** button and select **Merge Fields**.



2. Click the **Add Merge Field** button.

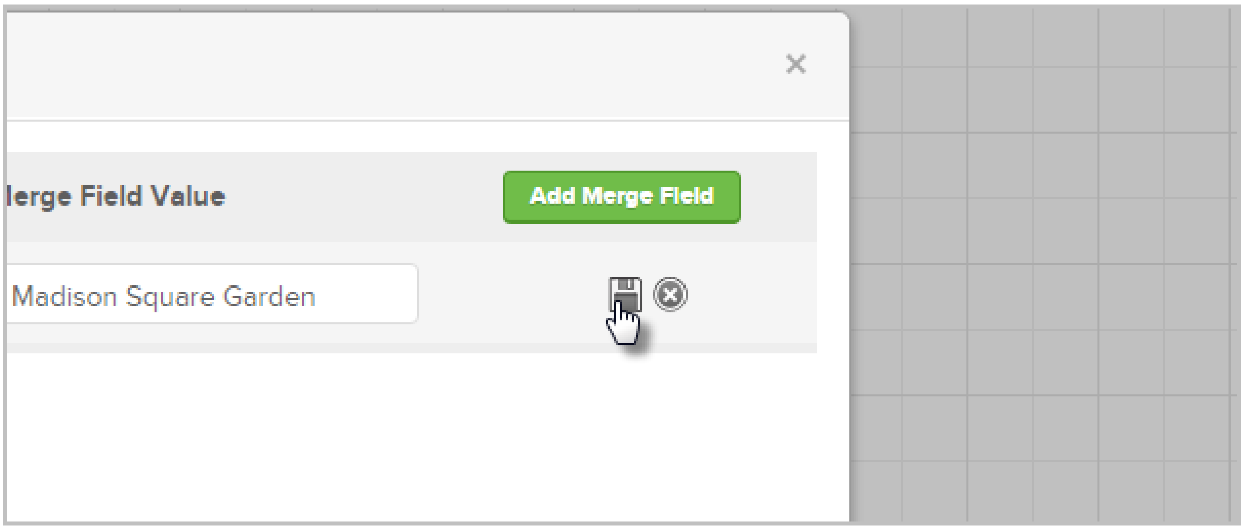


3. Enter the Merge Field Label and Value.



1. **Merge Field Label** - This is the name of the merge field. Only you will see this.
2. **Merge Field Value** - The actual value that will be merged into the email.

4. Click the **Save** icon to save your changes.

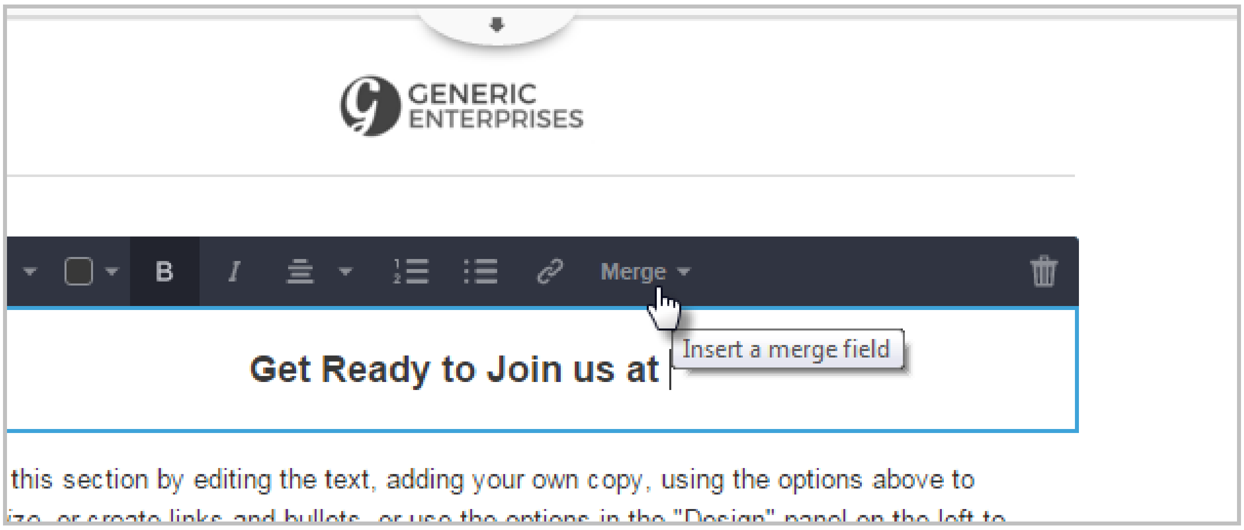


5. Repeat these steps to add more merge fields.

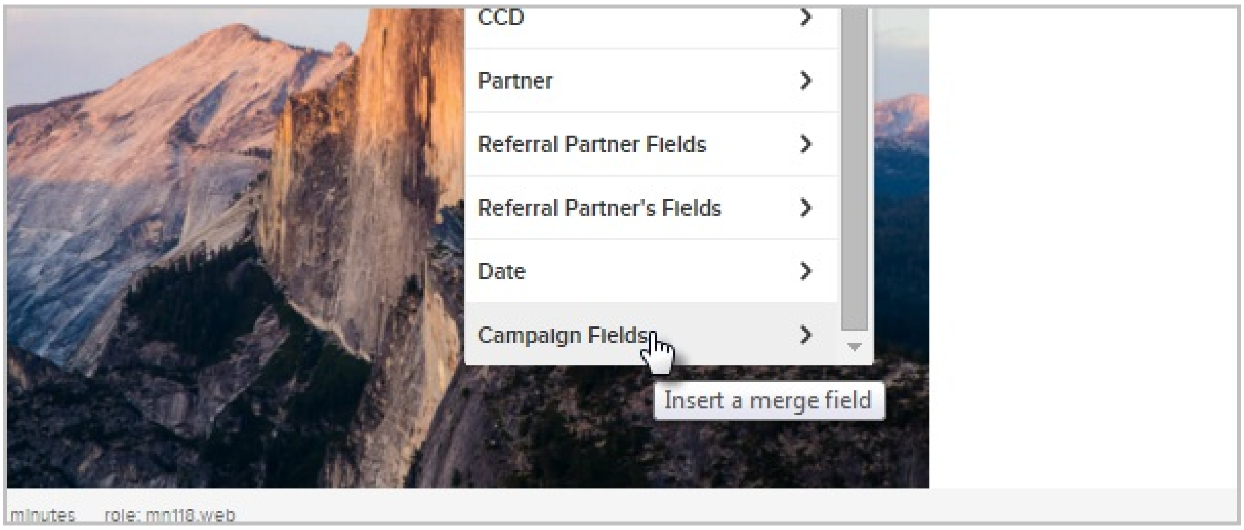
To insert a Campaign Merge Field into an email...

1. Open the email you would like to modify.

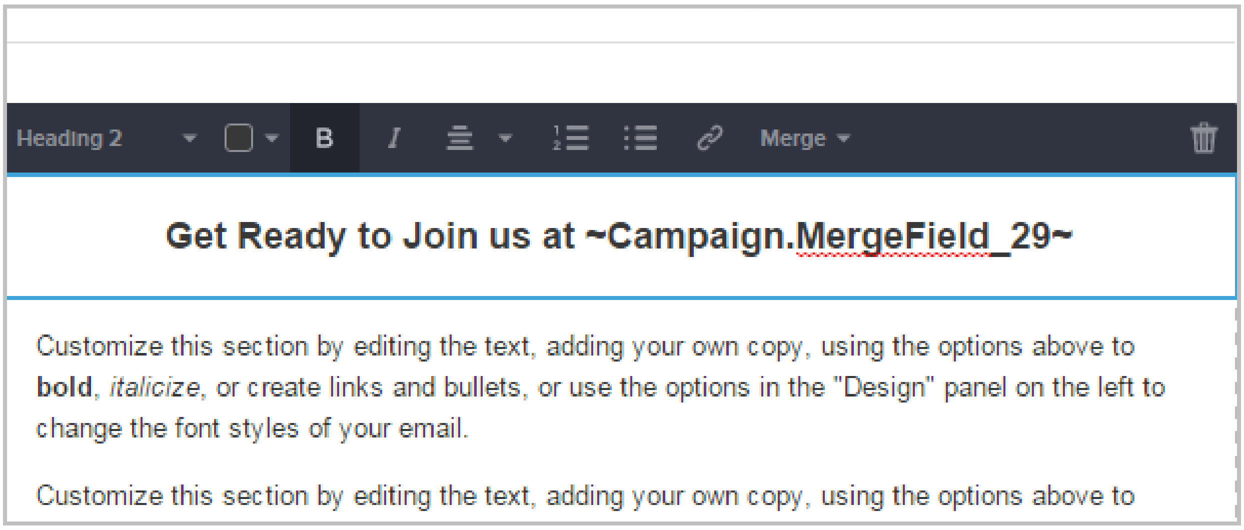
2. Click inside the email where you would like to insert the merge field and click the **Merge** drop-down.



3. Campaign Merge Fields are at the bottom of the merge drop-down list.

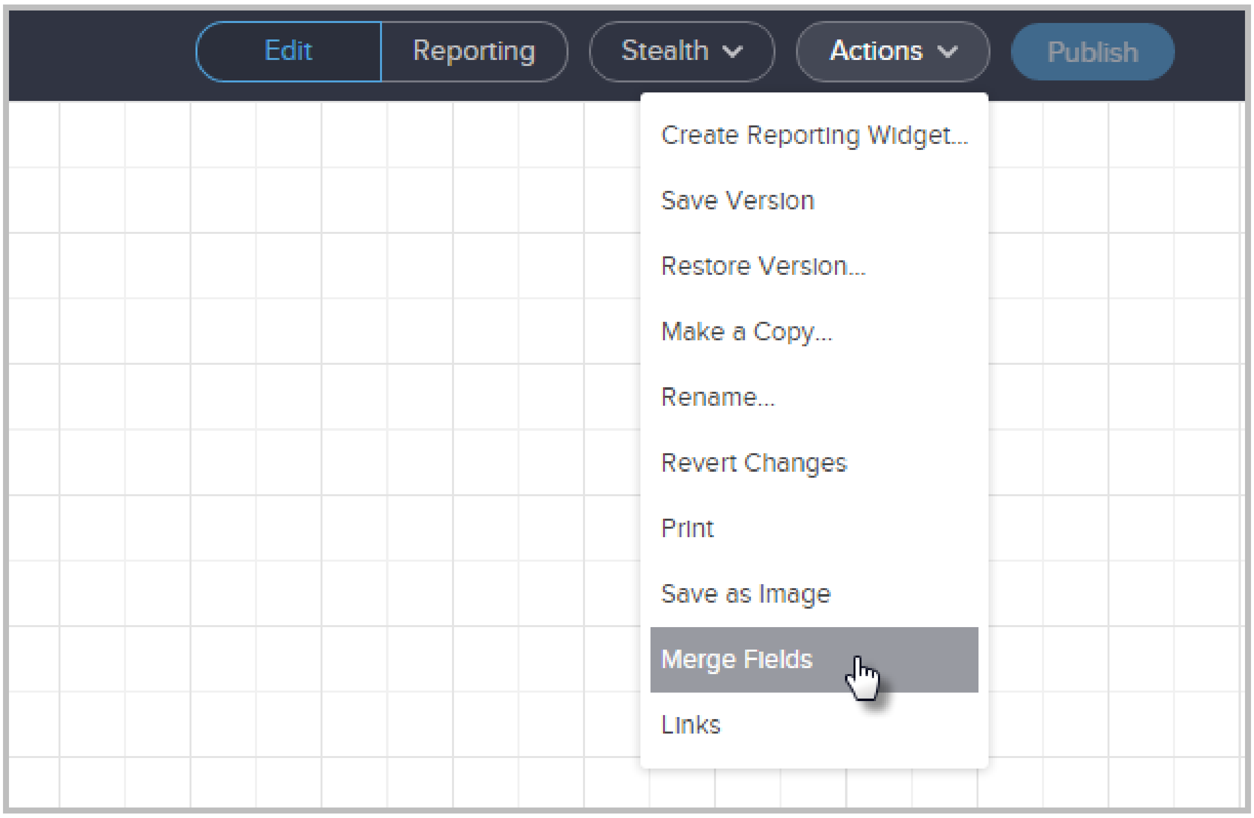


4. Click on the Merge Field and it will appear in the email.

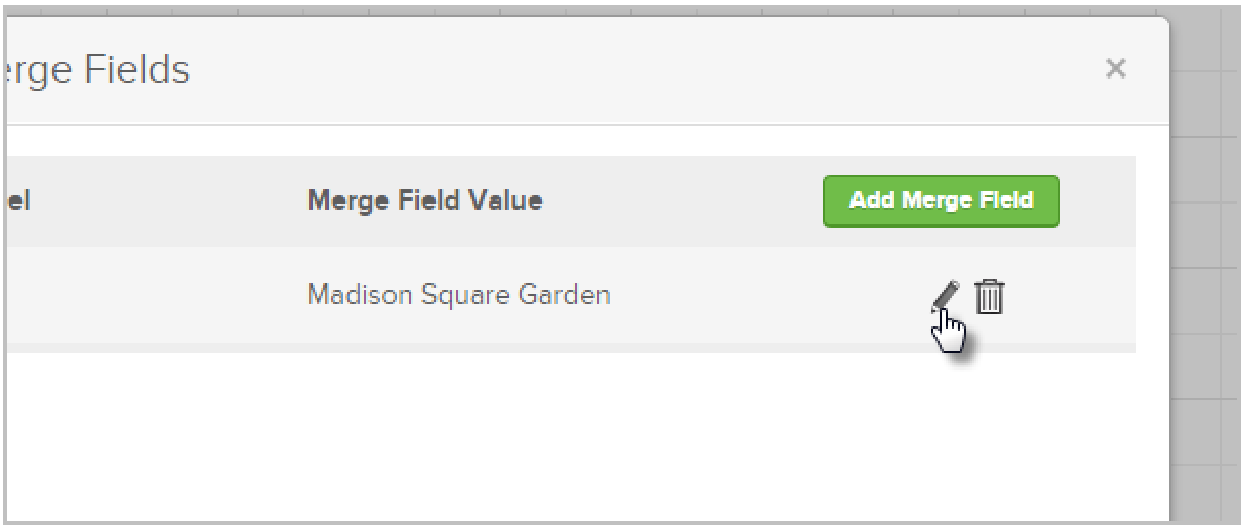


To Edit an existing campaign merge field...

1. While inside the campaign, click on the **Campaign** button and select **Merge Fields**.



2. Click the **pencil** icon to edit an existing merge field.



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Campaign Links

Last Modified on 07/23/2018 1:18 pm MST

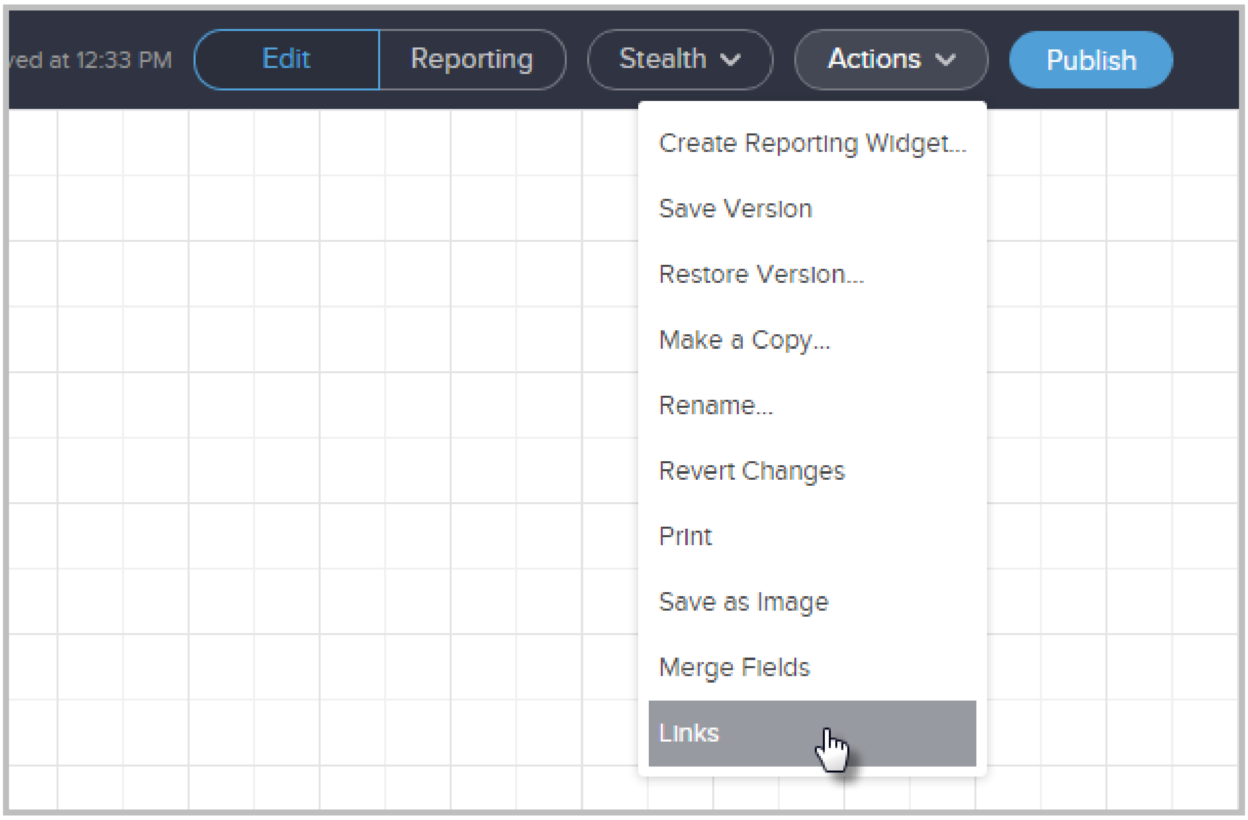
Campaign links are useful time-savers when hyperlinks in your campaign emails change frequently. A campaign link works very similarly to a campaign merge field .

Pro-Tips!

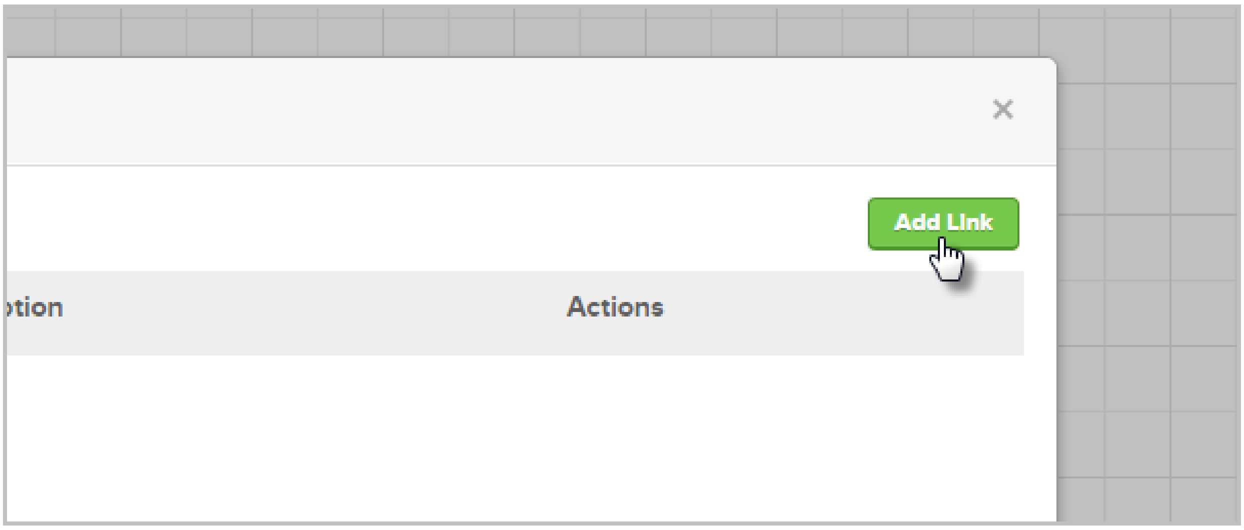
- There is no limit to the amount of campaign links you can create.
- A campaign link can only be used in the campaign that it was created in.

To create a Campaign Link...

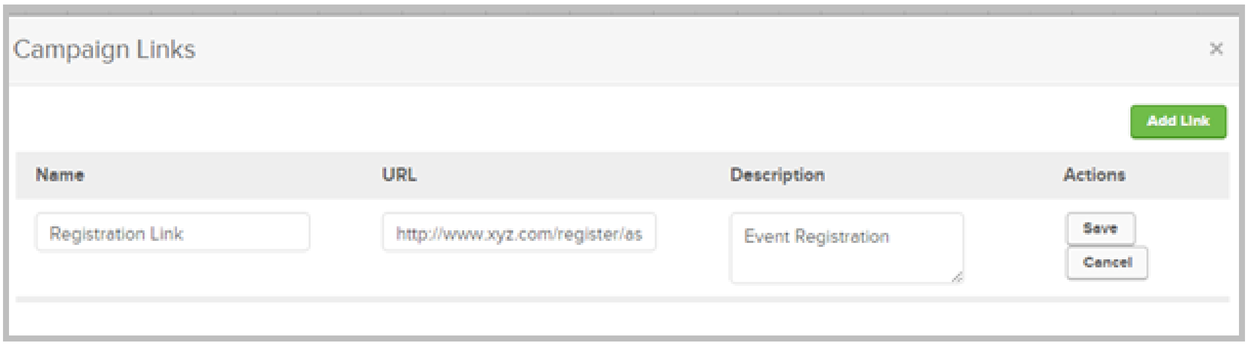
1. While inside your campaign, click on the **Campaign** button and select **Links.**



2. Click the **Add Link** button.

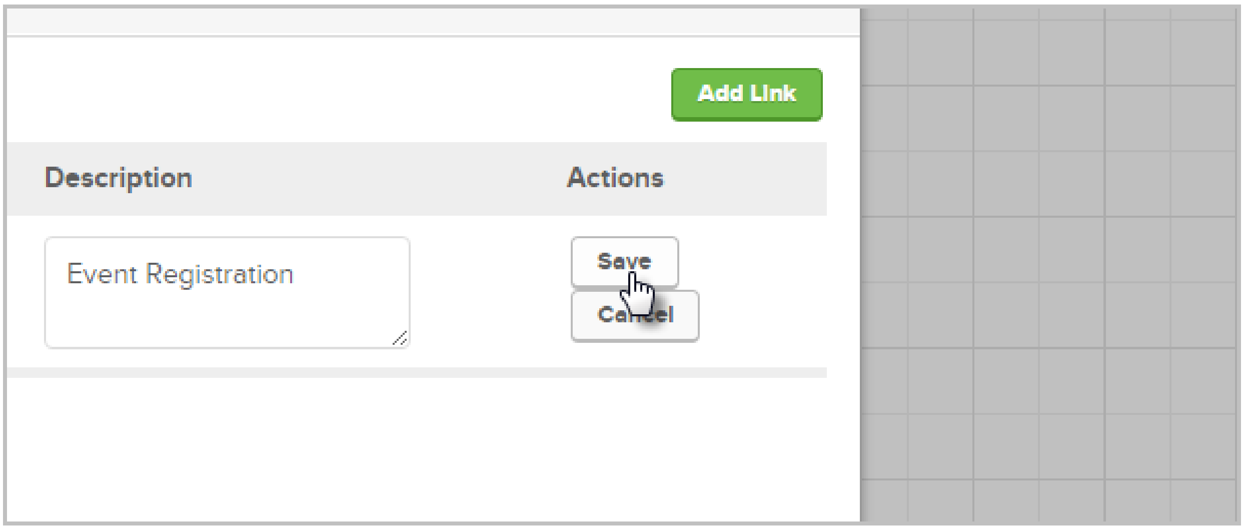


3. Enter the link Name, URL and (optional) Description.



   1. **Name** - This is the name of the link. Only you will see this.
   2. **URL** - The actual hyperlink that will be merged into the email (e.g., http://www.infusionsoft.com).
   3. **Description** (optional)

4. Click the **Save** button to save your changes

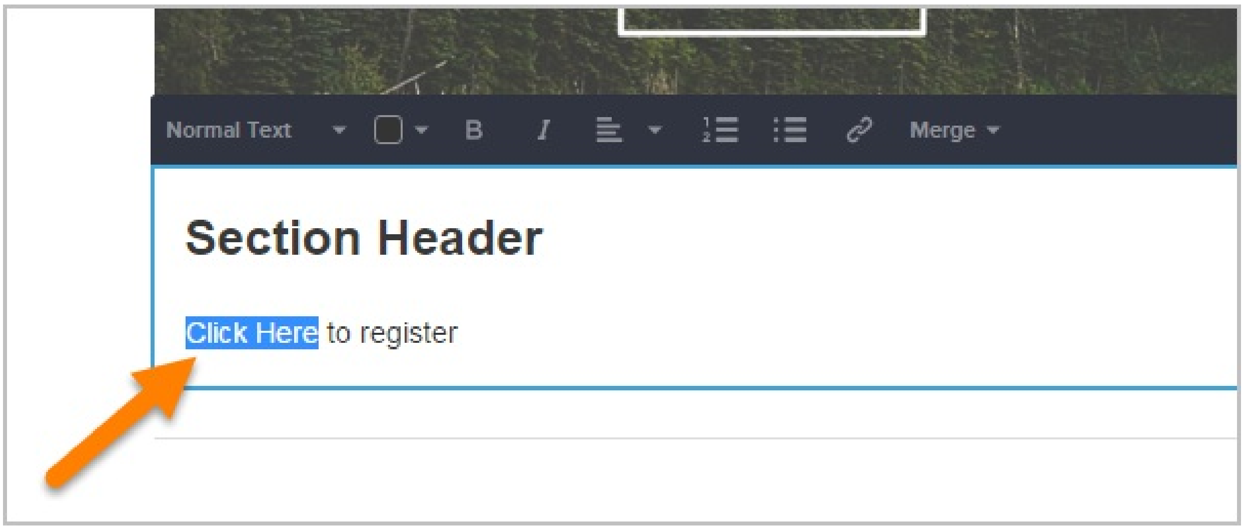


5. Continue the steps above to continue adding links. Click the Close button at the bottom when you are finished adding links.

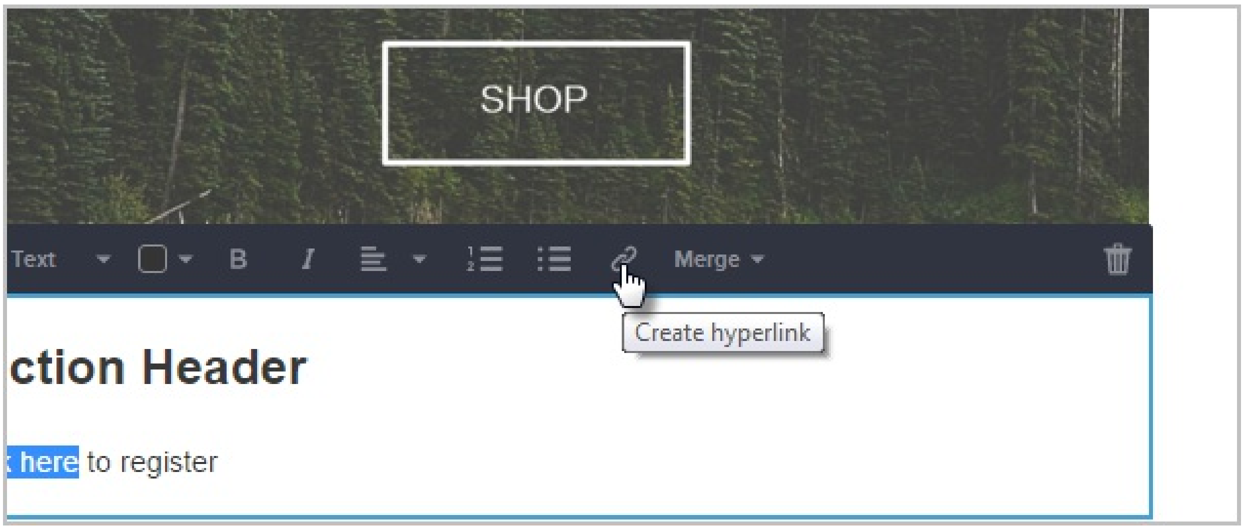
To insert a Campaign Link into an email

1. Open the email you would like to modify.

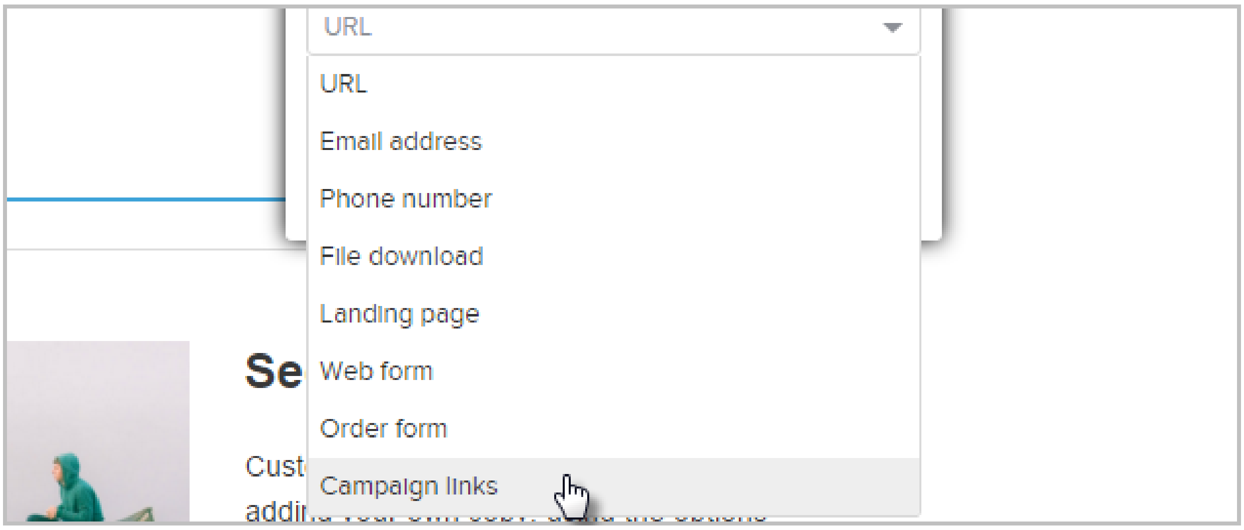
2. Highlight the text you want the reader to click.



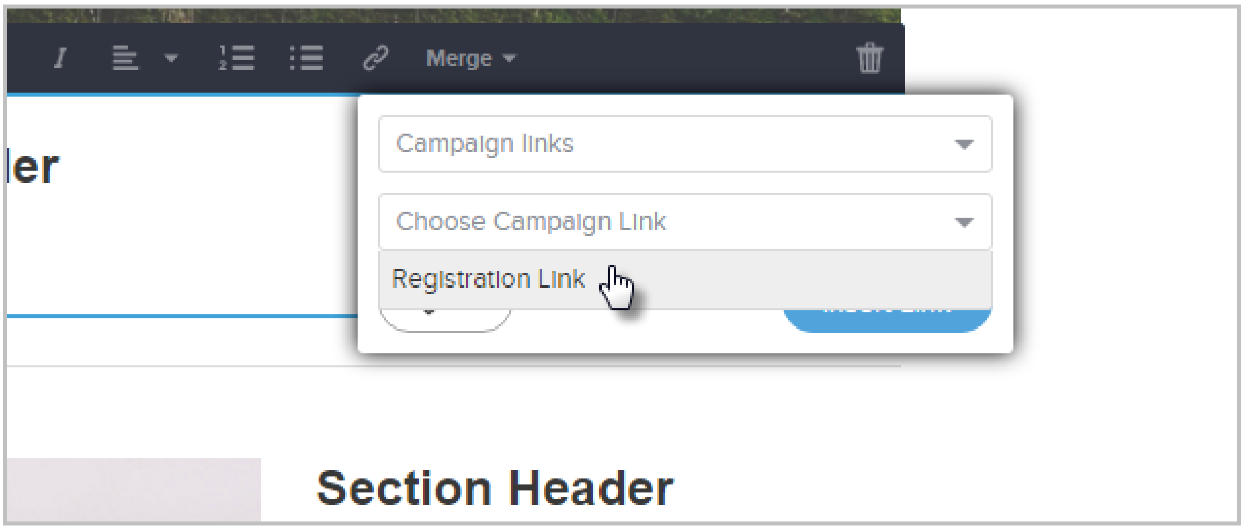
3. Click on the **Link** button.



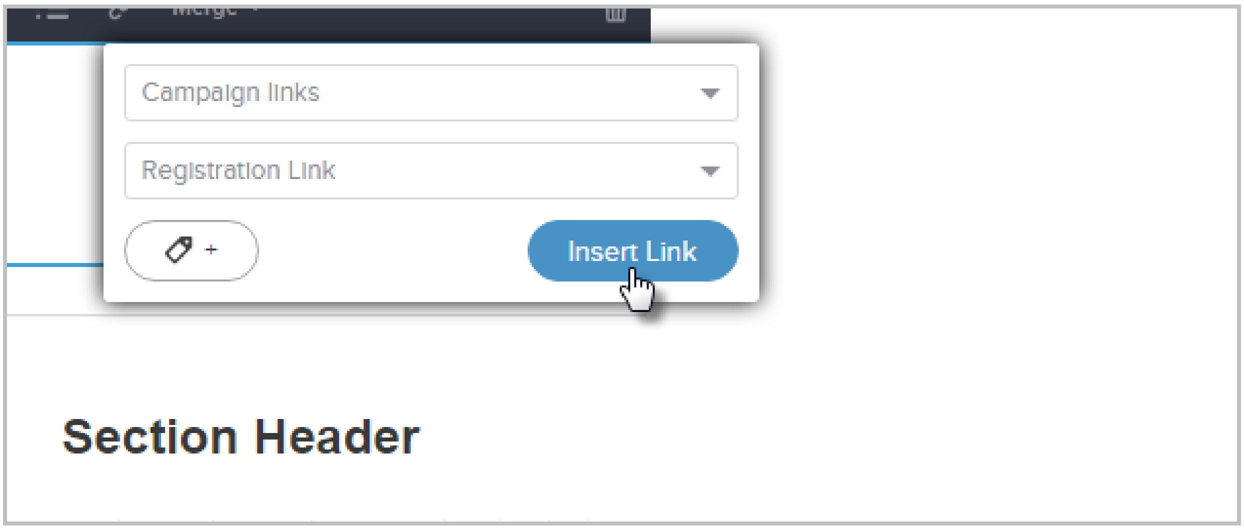
4. Select **Campaign links** from the drop-down.



5. Select the campaign link you created earlier.

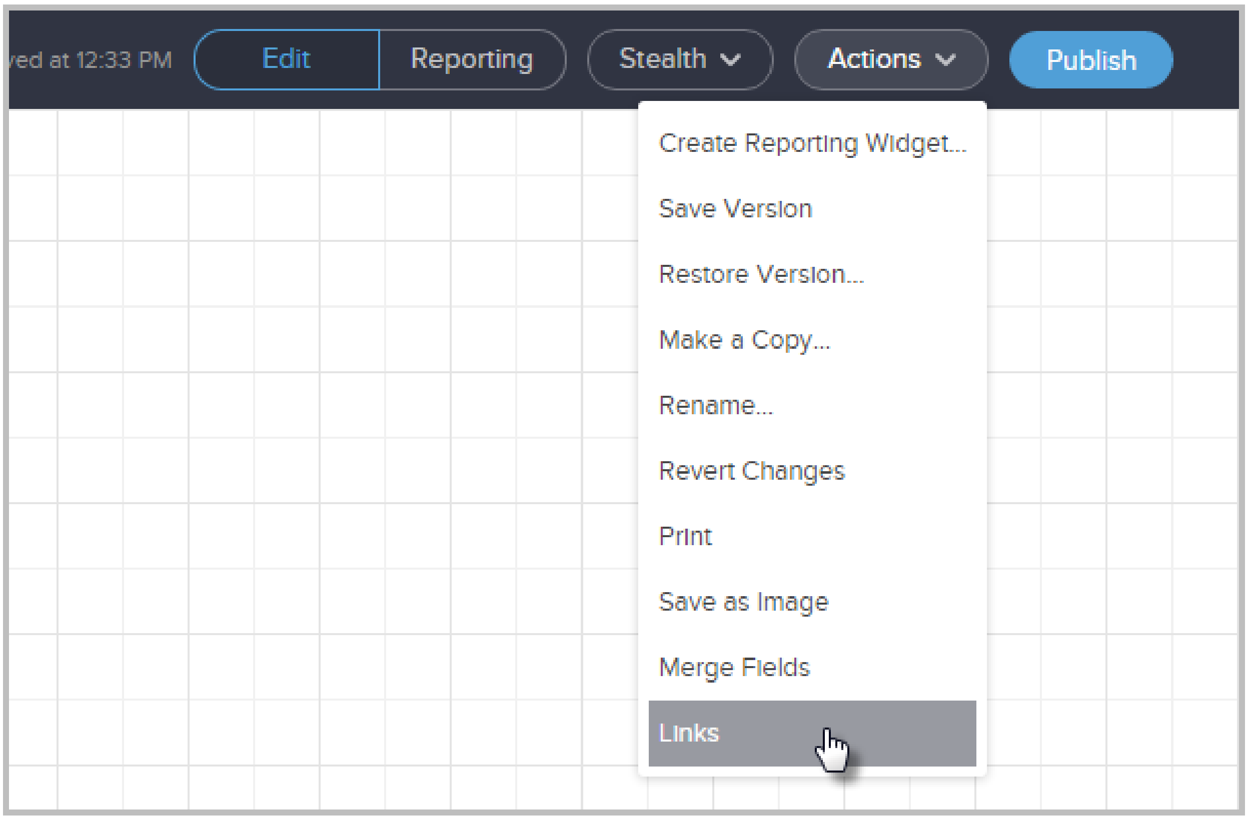


6. Click the **Insert Link** button

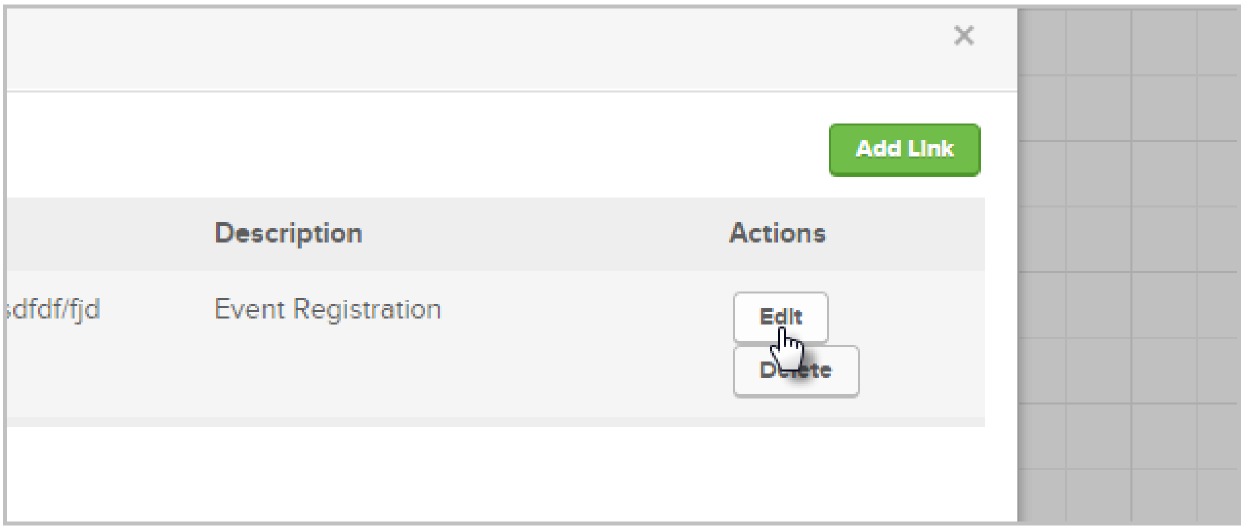


Edit an existing campaign link

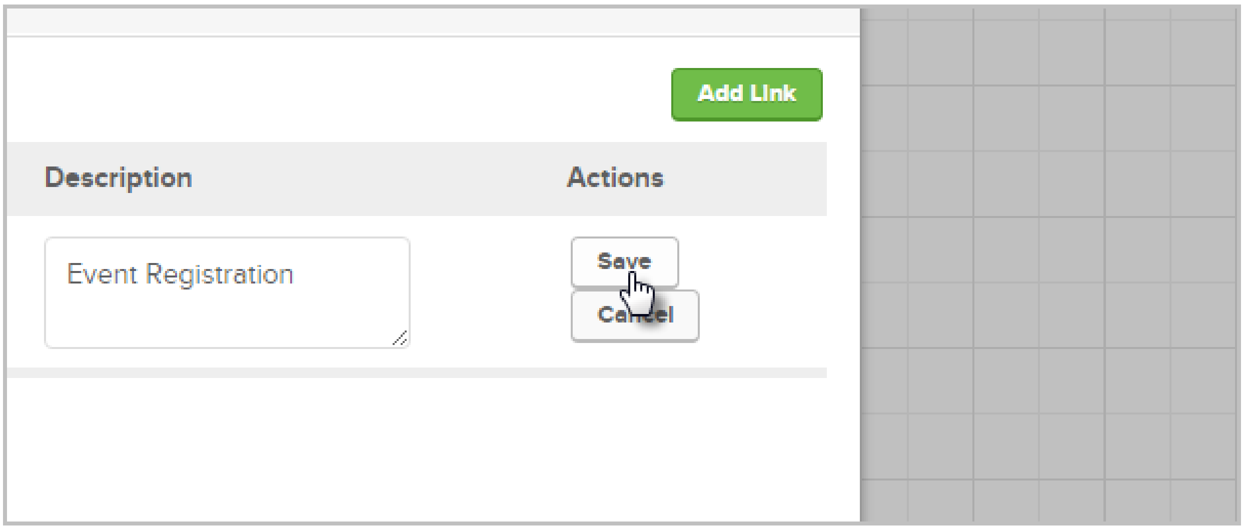
1. While inside the campaign, click on the **Actions** button and select **Links**.



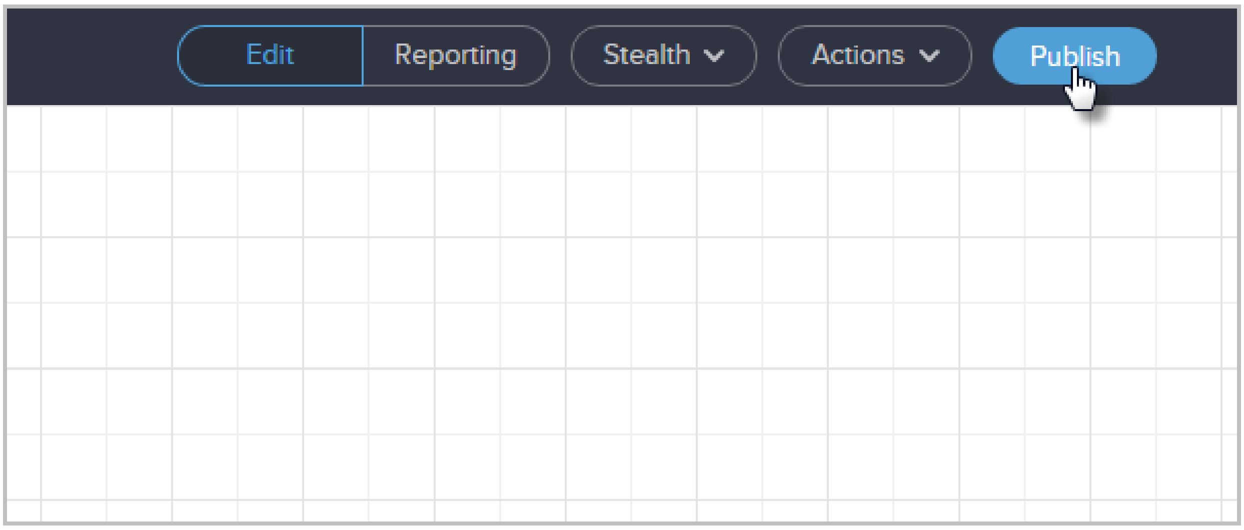
2. Click the **Edit** button next to the link you want to change.



3. Make your changes and click the **Save** button.



4. Publish the campaign to make your changes live.



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Republishing Campaigns FAQ

Last Modified on 07/23/2018 1:18 pm MST

A common question customers ask is "What happens when I make a change to an existing campaign and then re-publish it?" This article will answer specific questions that are commonly associated with re-publishing a campaign.

Can I change the text or verbiage of a specific email?

Yes. Once you re-publish the campaign, the revised email will only be seen by the people to who have not received the email previously.

Can I change where a link is driving a contact, without impacting the "Link Clicked" goal following it?

Yes, as long as you don't delete the link from your email and replace it with a brand new one, then the goal will remain unchanged. The Link Clicked goal is tracking a hyperlink you have created, you can change the destination at any time. If you do delete the link, and replace it with a new one, you'll need to be sure to go reconfigure the "Link Clicked" goal.

What happens if I add a goal?

Goals are either achieved or not. They cannot be retroactively achieved. So, if you publish a new goal, it can only be achieved in the future. If you have a goal configured to look for the application of a tag, when you publish, it will look for new applications of that tag. Any people who already have that tag will not automatically be placed into this campaign. The concept applies the same to customers that purchase products. If you publish a campaign with a goal configured by the purchase of a product, it will only be achieved by new purchases of that product.

What happens when I add a new email in the middle of a sequence? For example, what if I add an email between emails four and five in an existing sequence?

Only contacts that have not reached this point of the sequence will receive the newly added email. Contacts that have already passed this point in the sequence will not receive the email

What happens if I remove an email from a sequence?

If you remove an email and there are people who would have normally received the message, Infusionsoft will not send that email to those people. If you remove a timer as well, it will recalculate future steps and process accordingly.

What happens when I add an email or step to the end of an existing sequence?

Contacts that have not yet reached the end of the sequence will process the step based on the sequence setup, naturally. Contacts that have already passed through the sequence, or fell into queue at the end of the sequence will not have the additional step processed.

Insider’s Advice…

I recommend to completely build your campaigns out before launching. I know, that’s easier said than done. If you need to add steps to an existing sequence and you want all queued contacts to receive them, consider adding a new sequence after your existing one. Once contacts complete the steps in an existing sequence, if they don’t have somewhere to move to, they are added to a queued list. If you add a new sequence afterward, all queued contacts will be funneled in at the same time and the system will calculate the new sequence’s steps for everyone.

Using a different version of Infusionsoft? Click Here to learn more

Why Are Contacts Queued In My Campaign

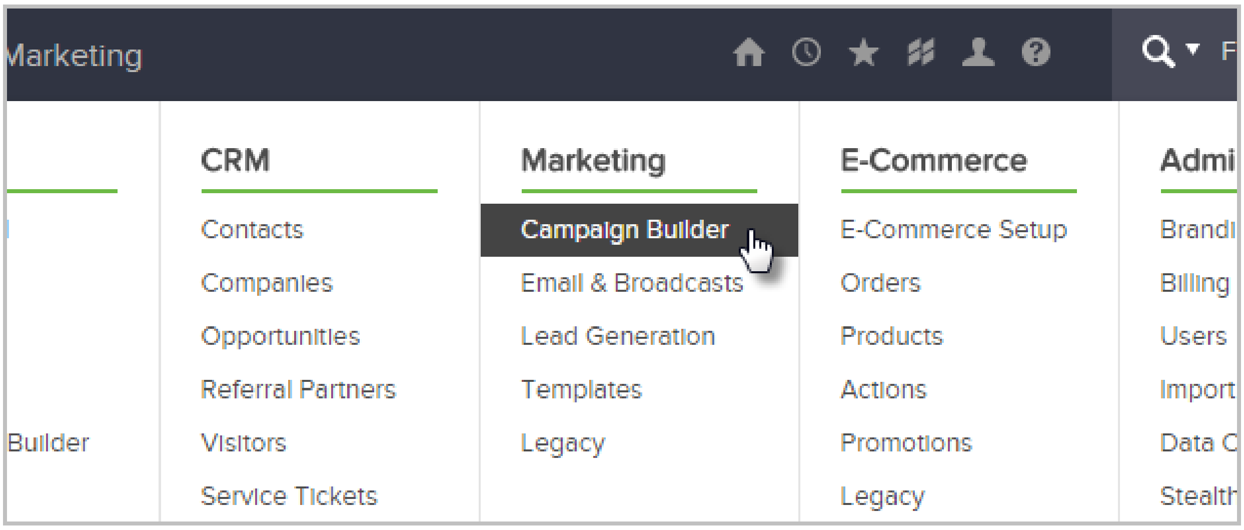
Last Modified on 07/23/2018 1:20 pm MST

A contact that is entered into a campaign can go through different statuses while moving through Sequences or triggering Goals. These statuses are "Active," "Queued" and "Done."

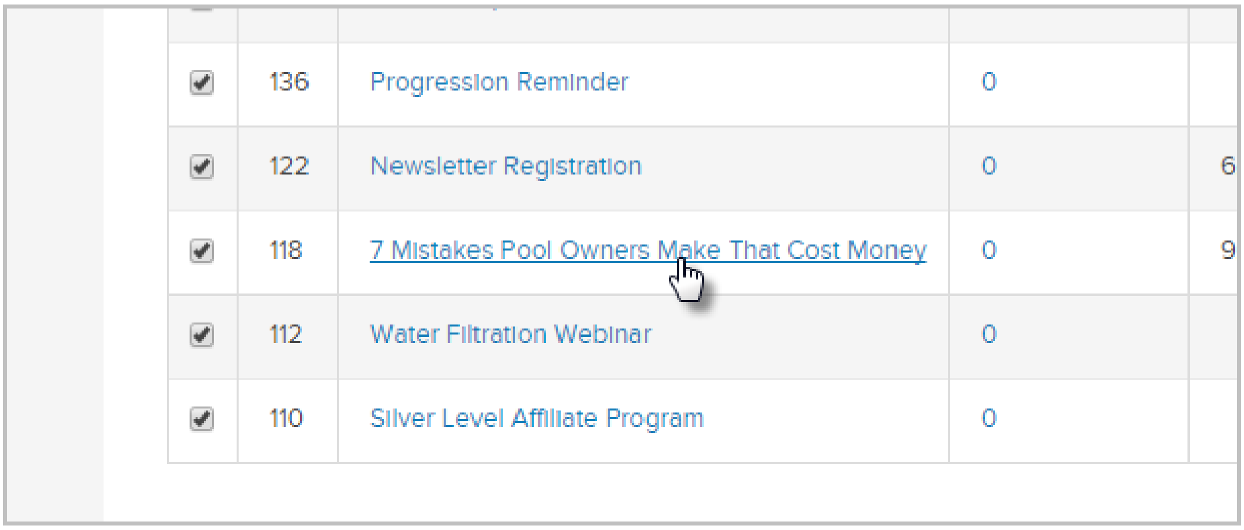
You can see these statuses after entering the campaign and clicking the "Reporting" tab near the top right corner of the builder window.

How to Find Contacts in these Statuses

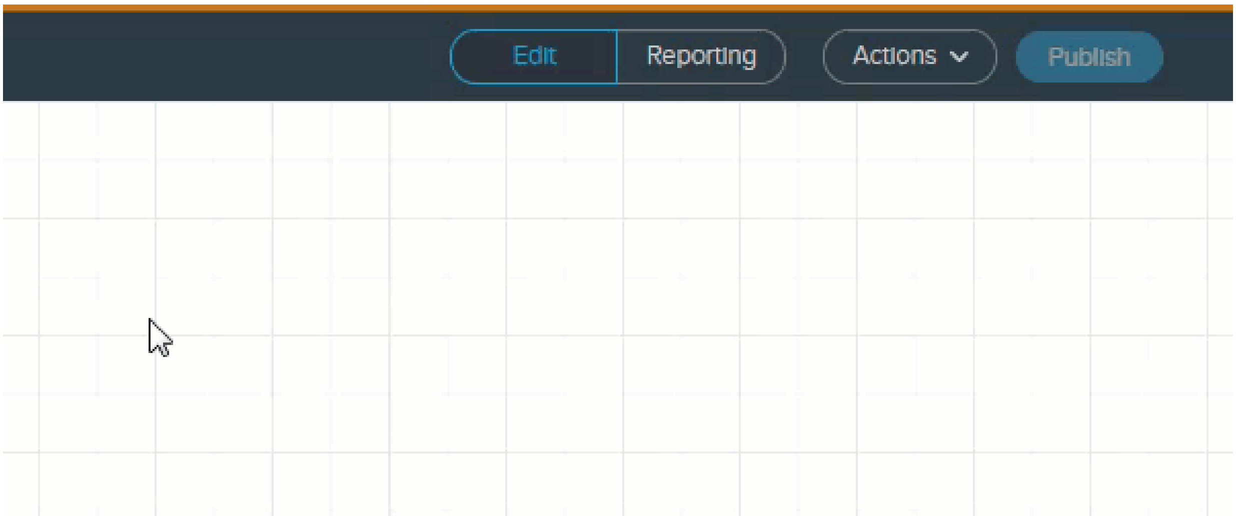
1. Navigate to **Marketing > Campaign Builder**



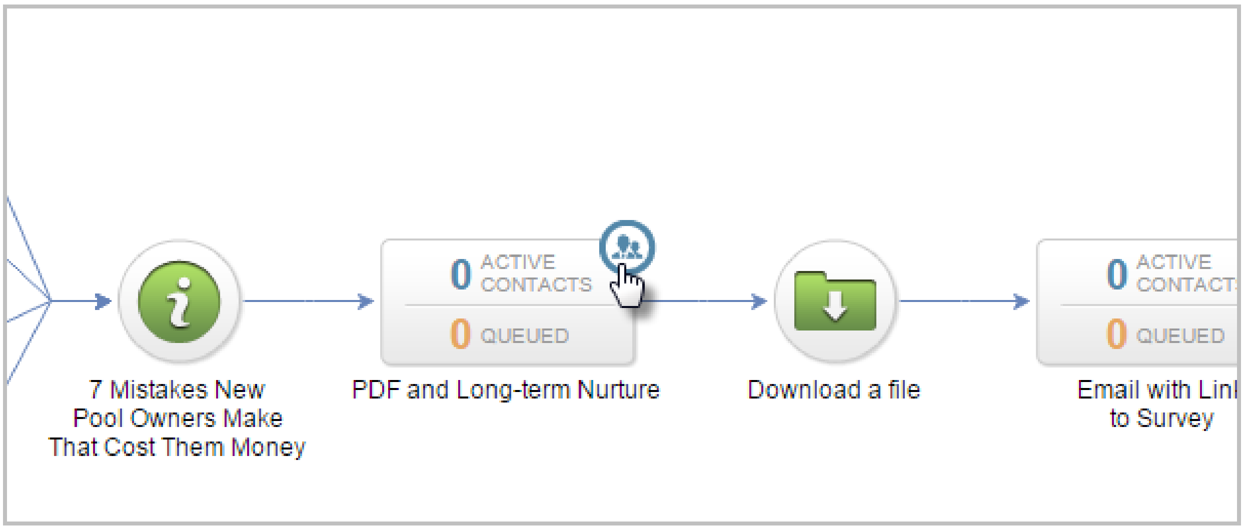
2. Open a published Campaign



3. Click the **Reporting** tab, near the top right corner of the builder

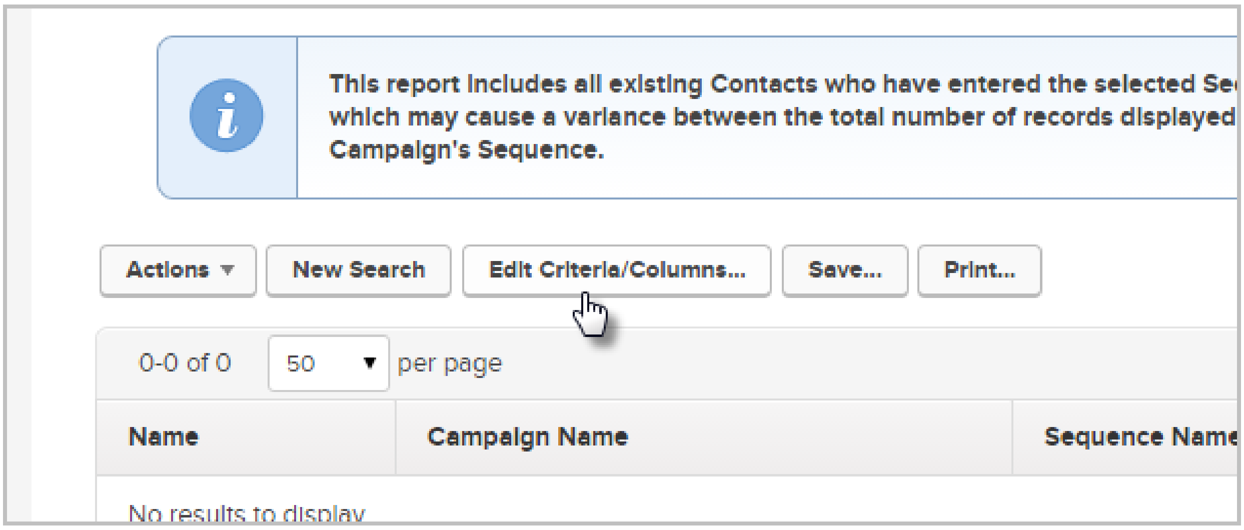


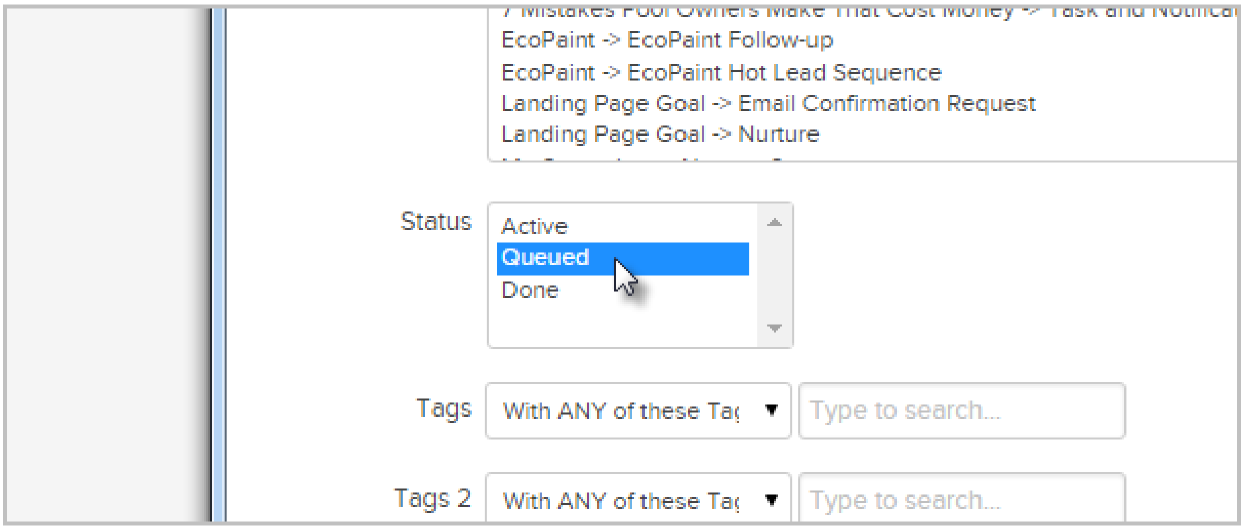
4. Hover over a sequence with queued contacts and click the person icon that appears in the top right of the sequence.



5. By default, this will pull up any Active contacts in the sequence. To change this, you will

need to click the "Edit Criteria/Columns" button, and a new window will appear. In that window, you will see a "status" field that has the three statuses that you can select from. Choose the status and Click OK.





Active

These contacts are indicated as blue. Active contacts in a campaign are currently waiting on a timer, or an action (email, task, apply/remove tag etc) to process.

Pro-tip! In most cases, the only time you will see contacts as active, is when they are waiting on a timer in a sequence.

Queued

These contacts are indicated as orange. Queued means that the contact has completed the actions in the sequence. They will remain "queued" until they achieve a goal in the campaign, or are manually pulled out of the sequence. Also, they can still receive new content if you were to add it to the end of the sequence, unless they have been in the queued status for 7 days or longer, so make sure to plan accordingly.

Pro-tips!

> Contacts will show as queued after completing a sequence, so if you entered contacts into a campaign and they are showing as queued, this does not necessarily indicate that the email was not sent.

> You can navigate to a contact in the campaign and click the "Campaigns" tab to view if there were any errors in processing the action.

Done

Contacts in the Done status are not indicated in the performance tab of the campaign. These contacts have completely finished a sequence. They cannot receive additional content unless they are re-triggered into the campaign, either manually or by achieving a start goal.

Using a different version of Infusionsoft? Click Here to learn more

How to Build a Looping Sequence

Last Modified on 08/14/2018 7:42 pm MST

How to setup a campaign that will send and/or run an action continually.

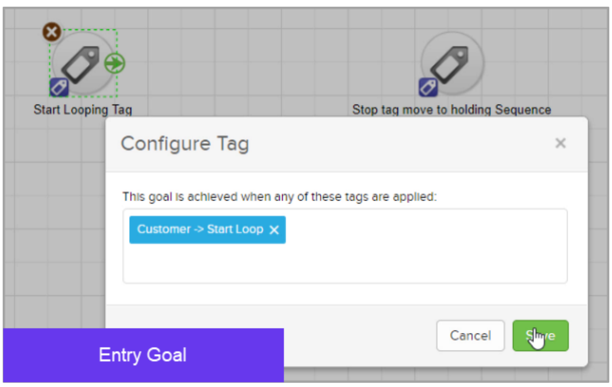
Pro tip! Click any image to view larger

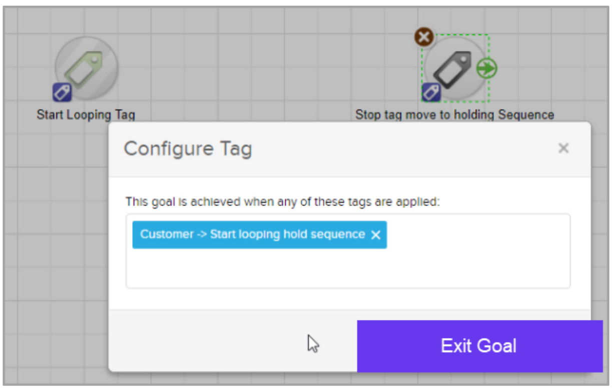
Create your campaign

- Navigate to Marketing > Campaign Builder
- Click on “Create my own Campaign”
- Name the campaign
- Click Save

1. Drag out two Tag Applied goals

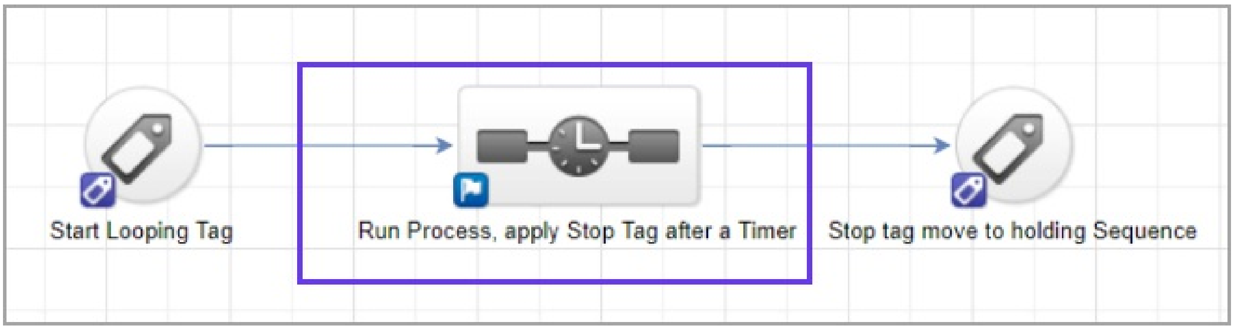
2. Create two different tags -- one for each goal





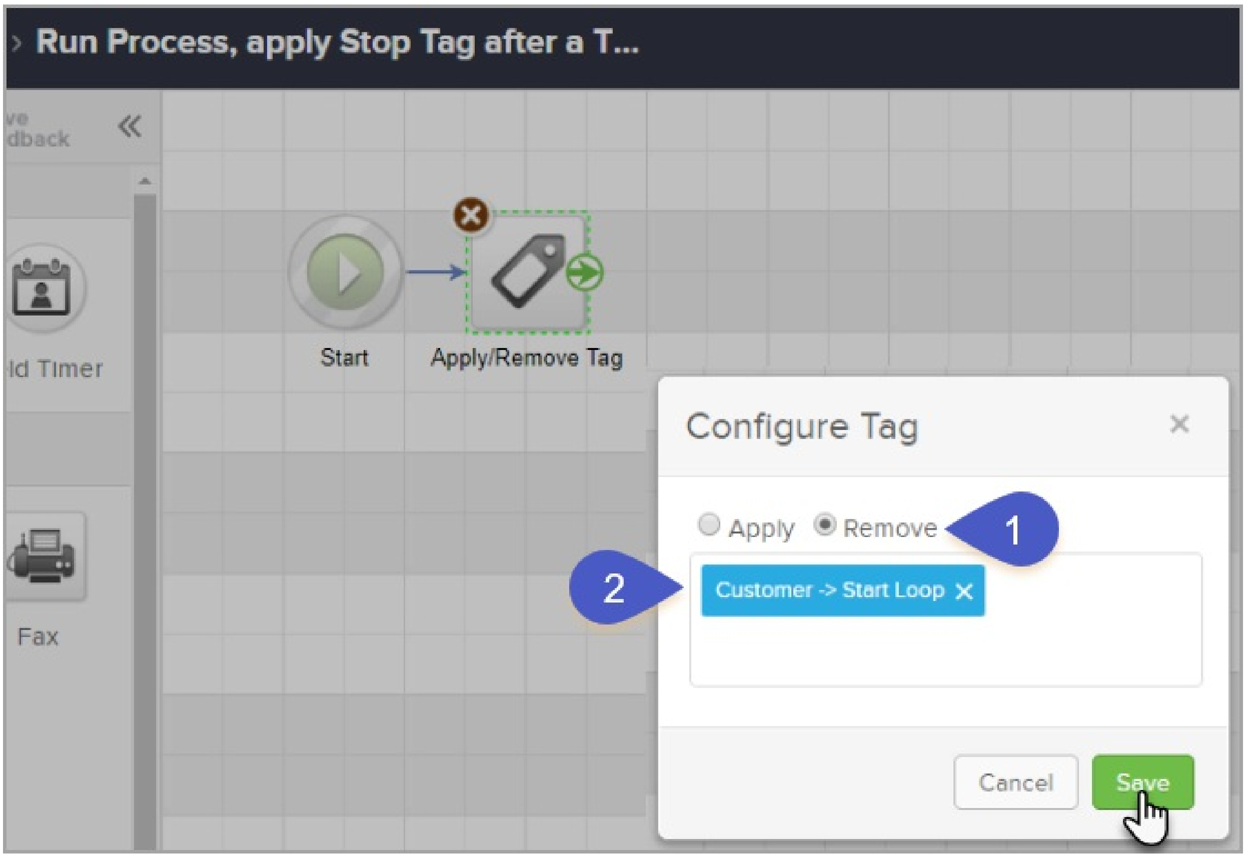
3. Add a sequence between two tag goals, and connect the entry goal to the sequence,

and the sequence to the exit goal

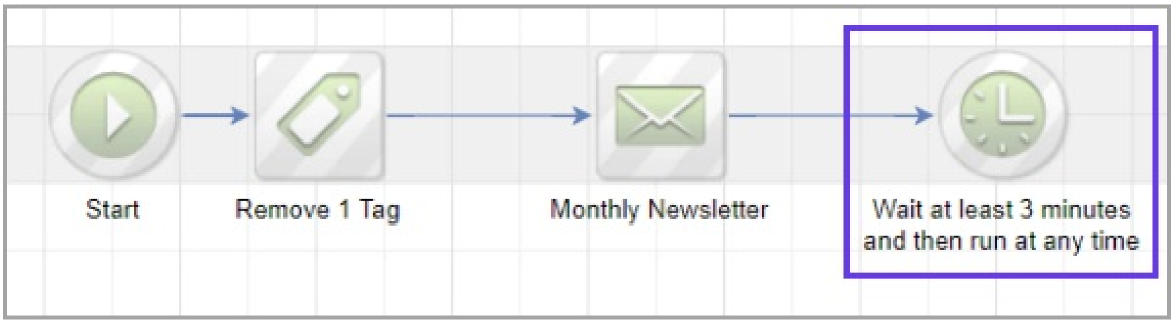


In the sequence

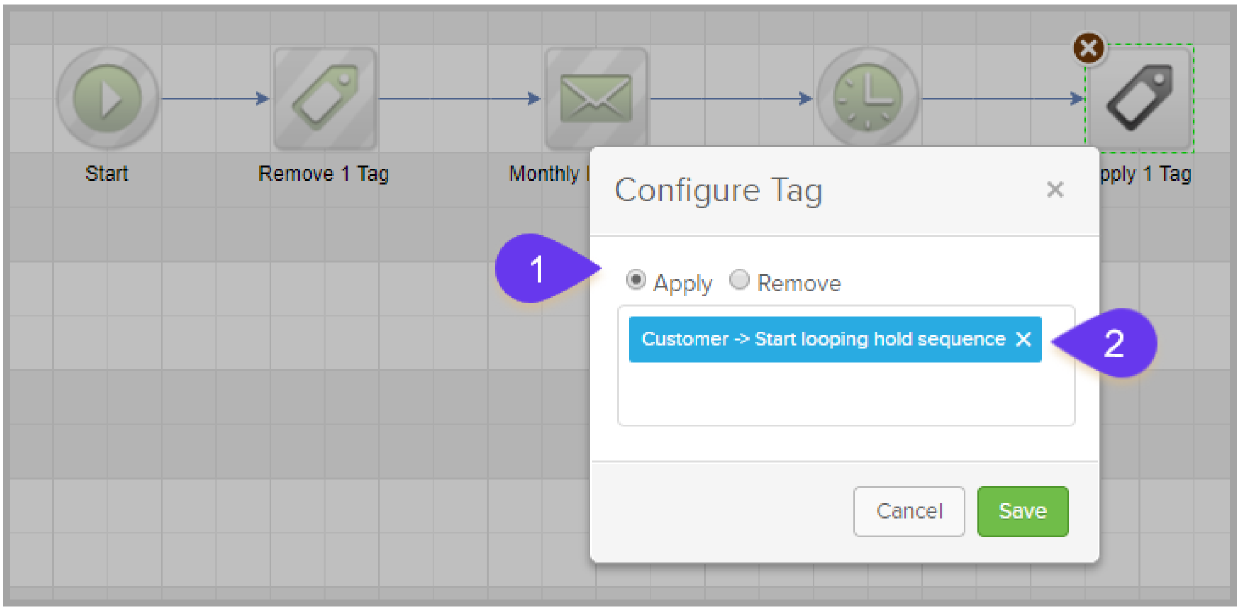
1. Double click on the sequence
2. Add an Apply/Remove Tag process after the Start timer
3. Set the process to Remove "Start Loop" tag



4. Next add steps (timers, emails, etc)
5. Then a timer for at least 3 minute

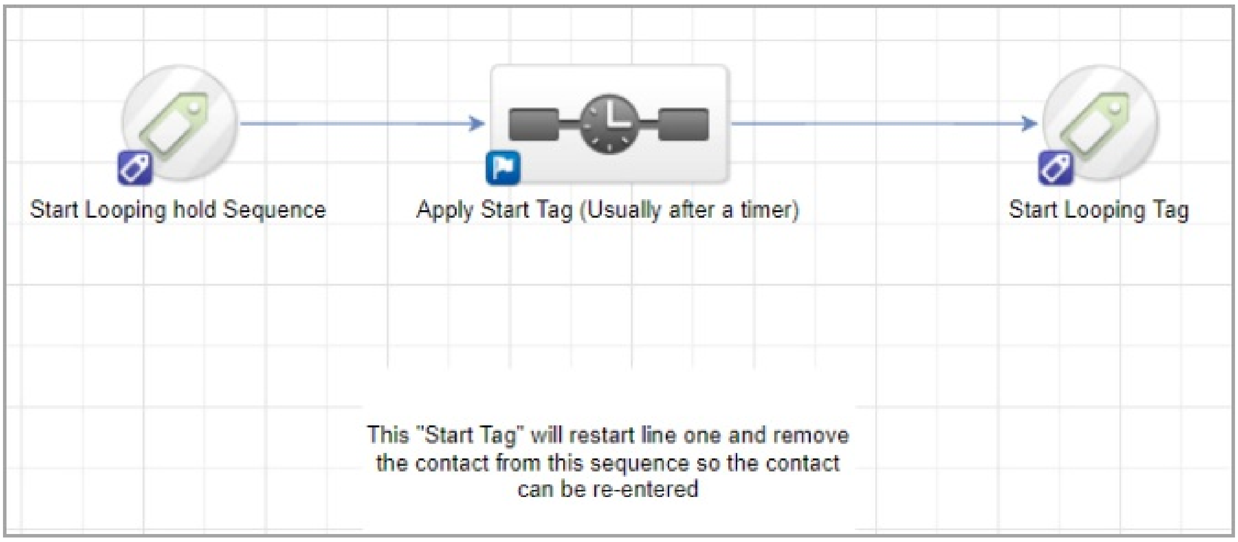


6. For the final step, add an Apply/Remove Tag process to apply "Start Looping hold Sequence" tag

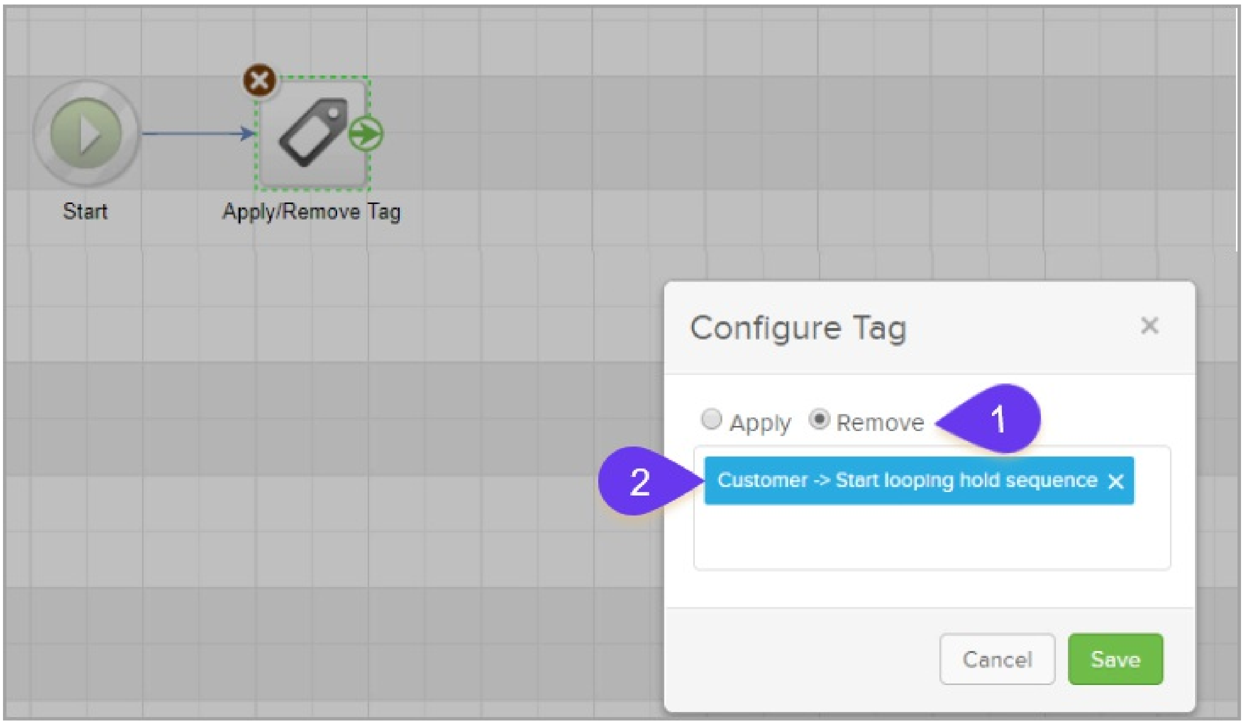


Create Second Sequence

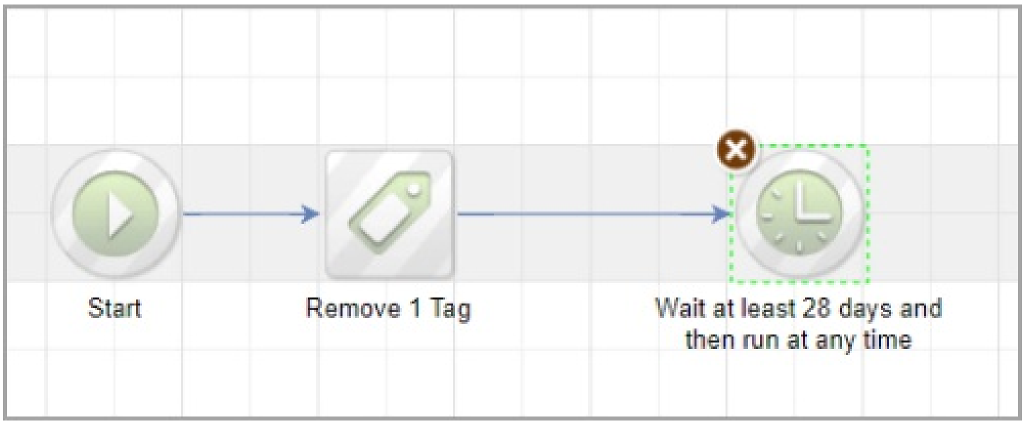
1. Drag out two new tag goals, and place a sequence between them, connecting the items
2. Set the first tag goal to be achieved when 'Start Looping hold Sequence" tag is applied, and the second tag goal for when "Start Loop" is applied



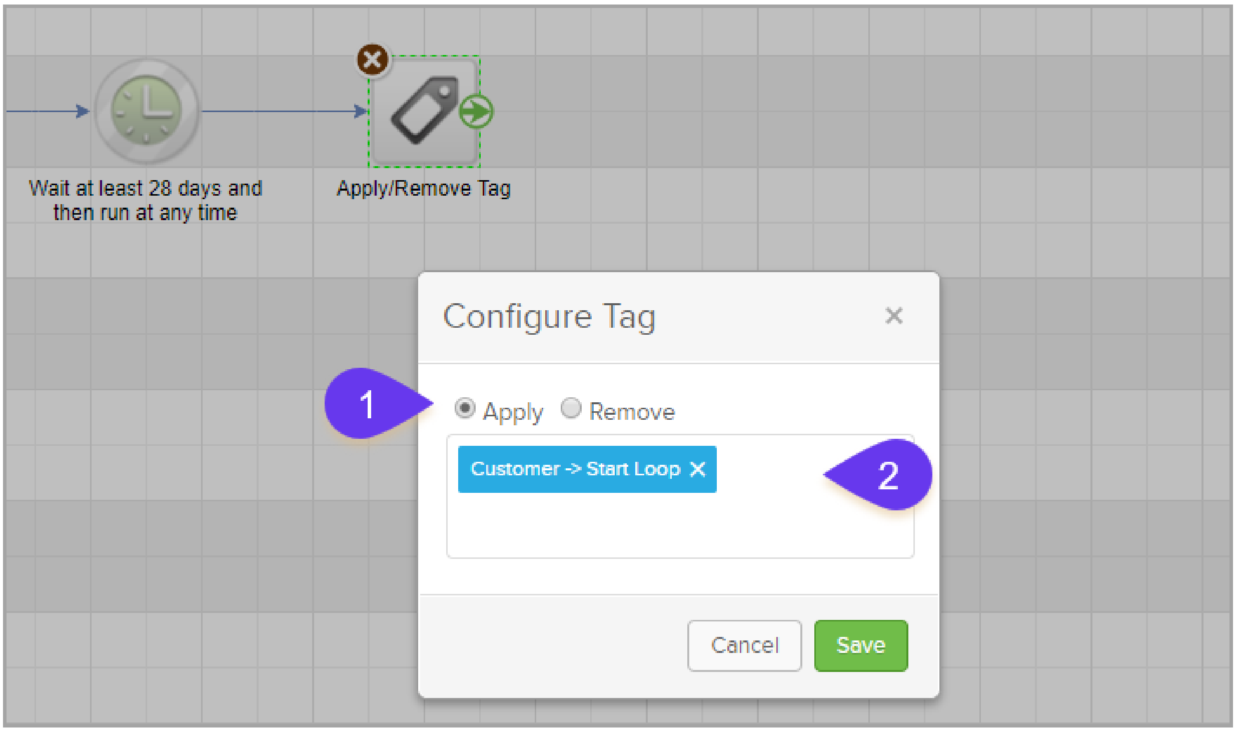
3. Remove "Start Looping hold Sequence" tag



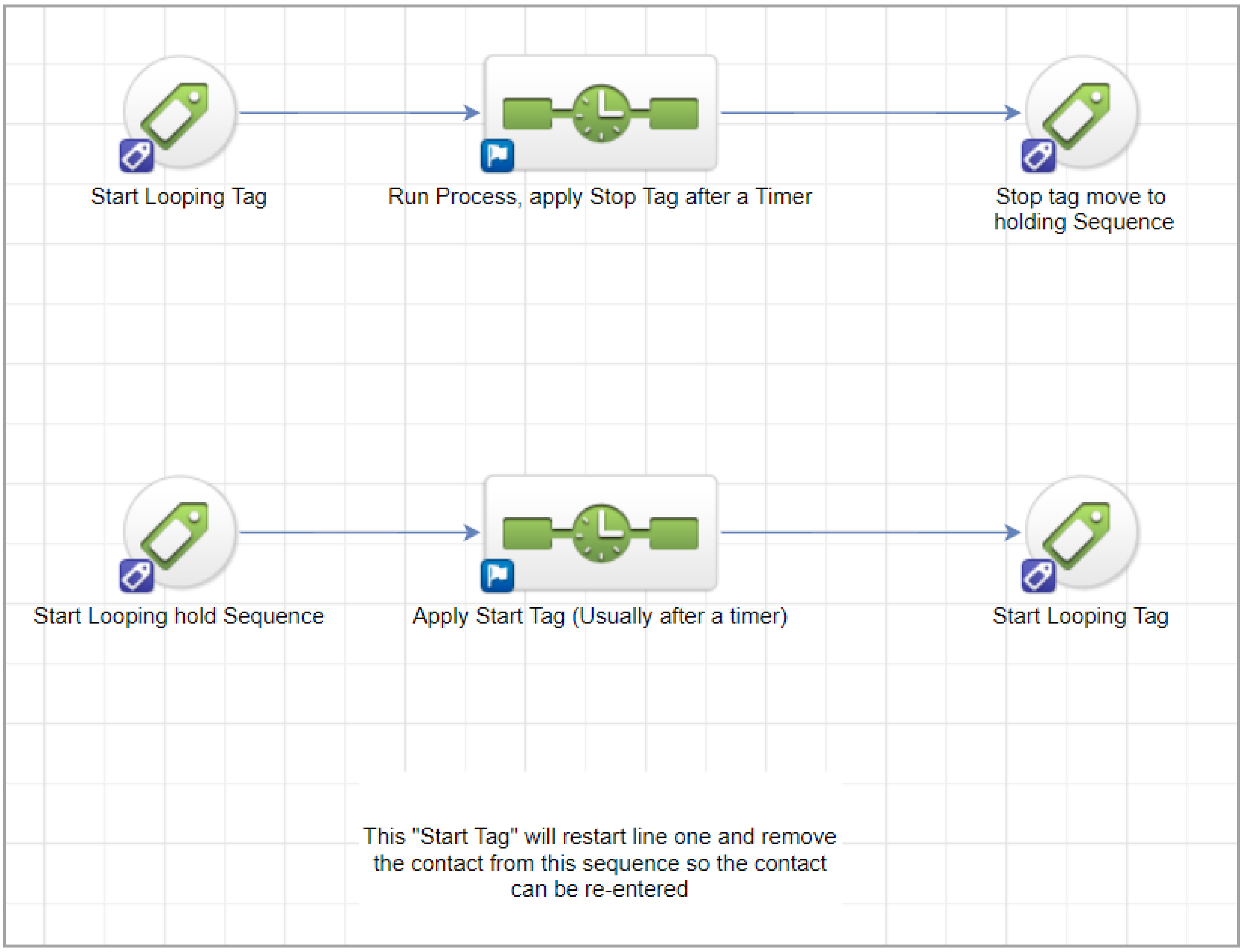
4. Set timer for desired wait time before the contact is looped



5. Apply "Start Loop" tag



The loop will end up looking like this:



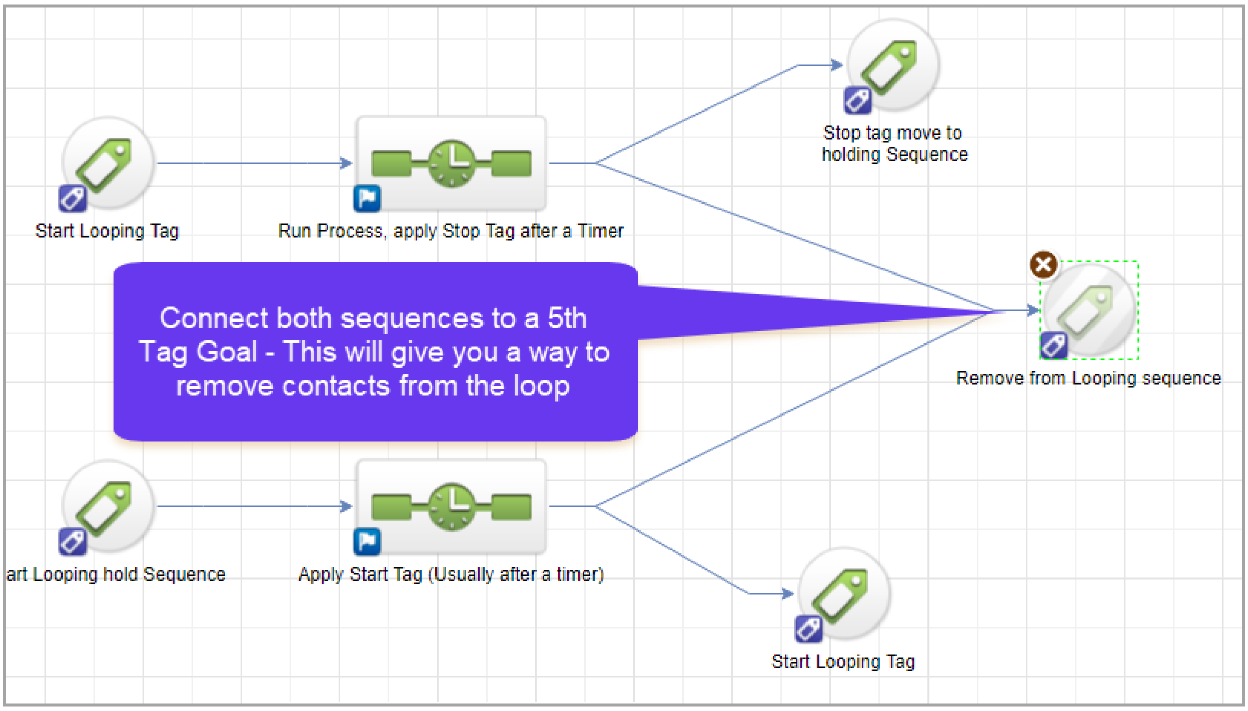
Add End Loop Goal

Add Goal

1. Drag a 5th Tag goal and place behind all sequences
2. Set the Tag Goal to be achieved when "Remove form looping campaign" tag is applied

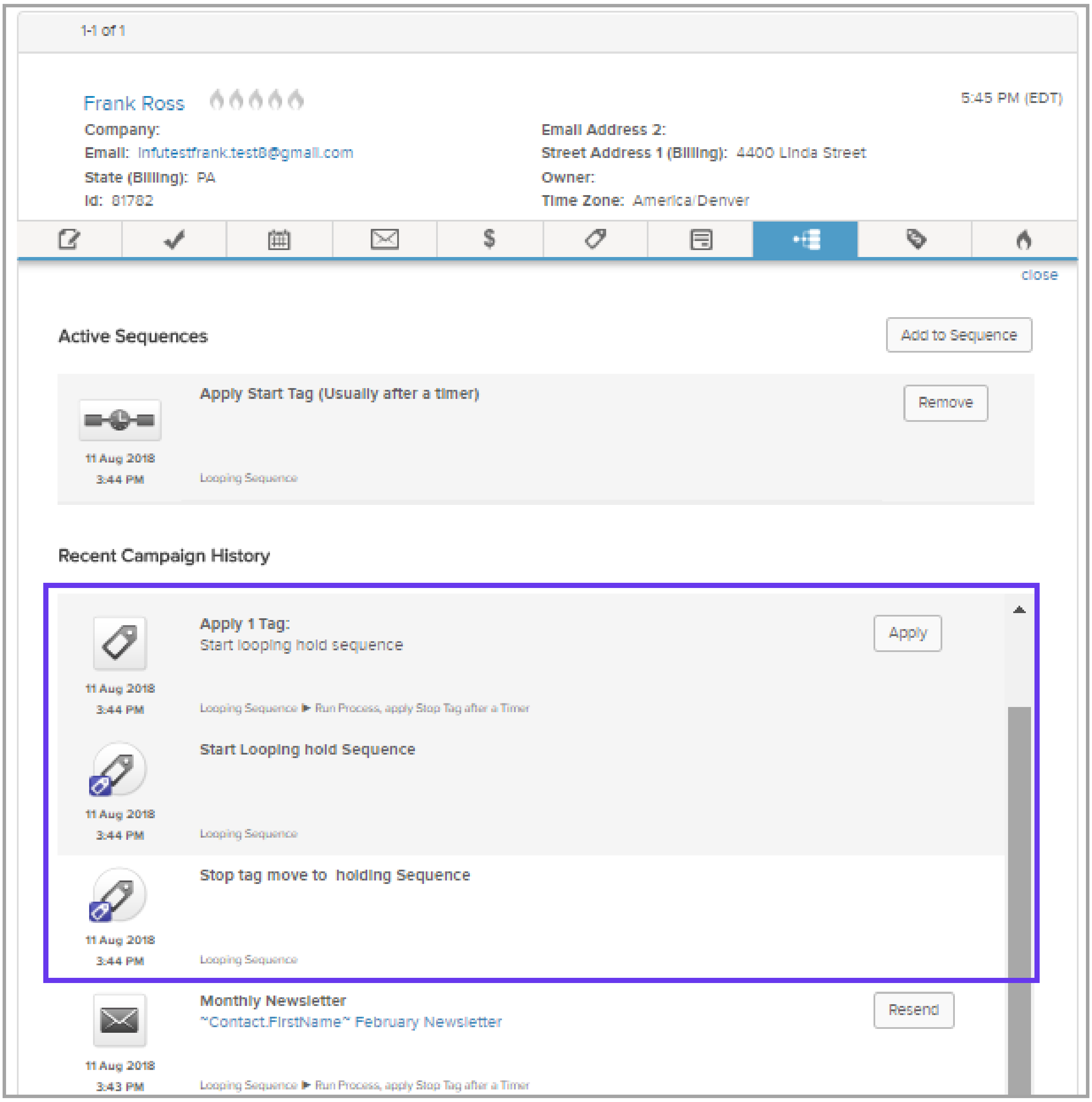
Apply Tag

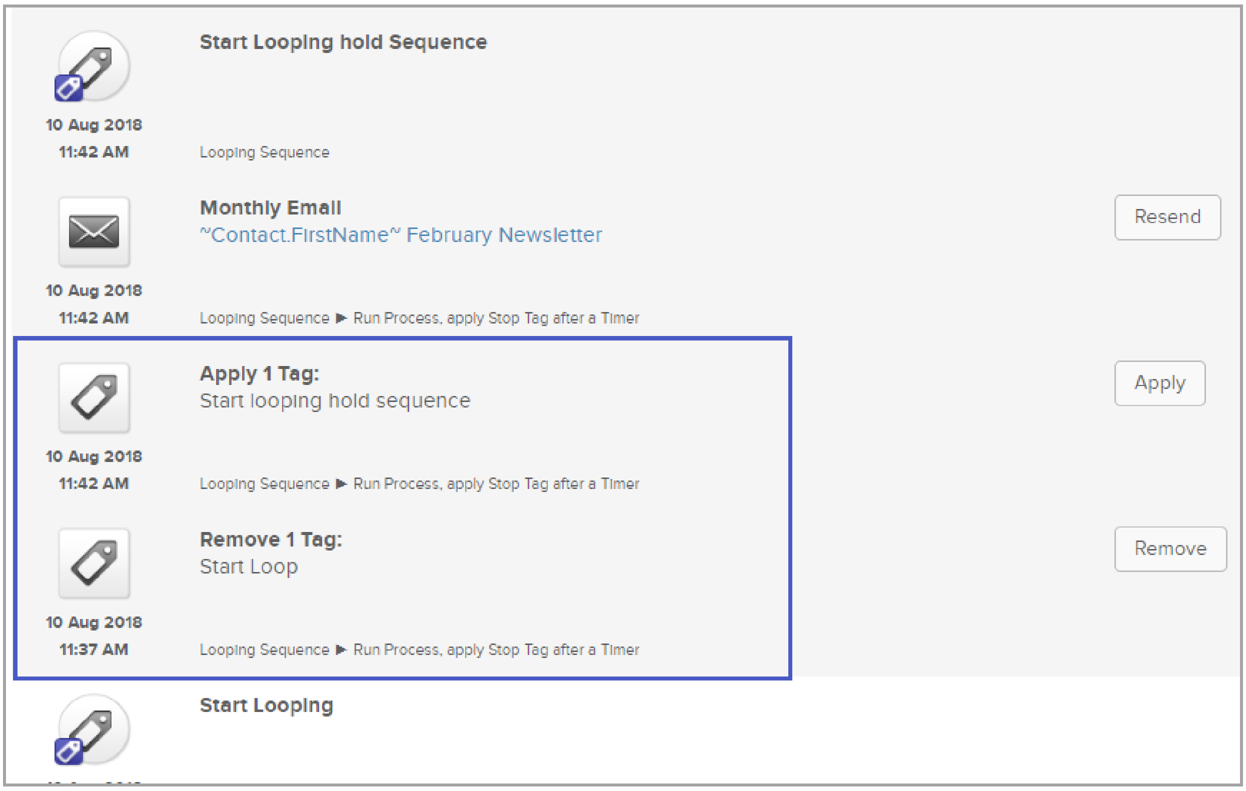
The "Remove form looping campaign" tag can be manually applied in the contacts record OR you can create a process to applies it. For example if you created a process to apply the tag when a Opt-Out Web Form/Landing Page is submitted, that would apply the tag and therefore remove the contact from the loop



Contact's Campaign History Tab

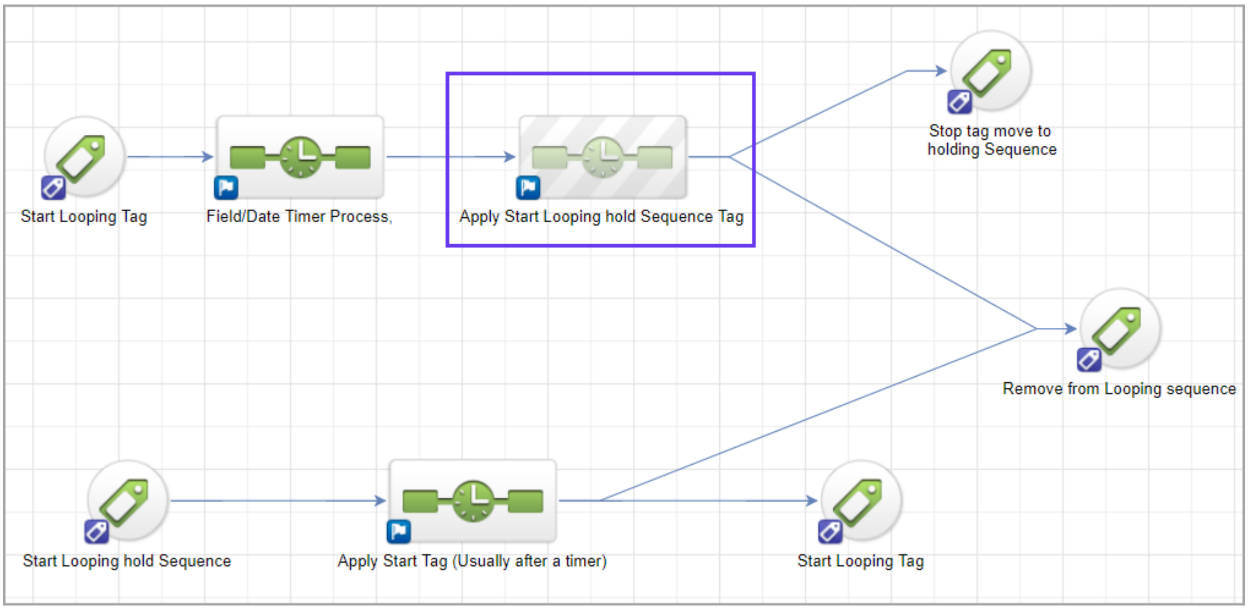
When reviewing the Campaign History tab, you might see the Tag Goals listed before the Apply/Remove tag goal and/or the Apply/Remove tags grouped together. This is only a display issue because these run at the sametime. The process is running as designed.


1-1 of 1
Frank Ross
5:45 PM (EDT)
Company:
Email: infutestfrank.test8@gmail.com
State (Billing): PA
Id: 81782
Email Address 2:
Street Address 1 (Billing): 4400 Linda Street
Owner:
Time Zone: America/Denver
close
Active Sequences
Add to Sequence
Apply Start Tag (Usually after a timer)
Remove
11 Aug 2018
3:44 PM
Looping Sequence
Recent Campaign History
Apply 1 Tag:
Start looping hold sequence
Apply
11 Aug 2018
3:44 PM
Looping Sequence ▶ Run Process, apply Stop Tag after a Timer
Start Looping hold Sequence
11 Aug 2018
3:44 PM
Looping Sequence
Stop tag move to holding Sequence
11 Aug 2018
3:44 PM
Looping Sequence
Monthly Newsletter
~Contact.FirstName~ February Newsletter
Resend
11 Aug 2018
3:43 PM
Looping Sequence ▶ Run Process, apply Stop Tag after a Timer



Field/Date Timers

In situations where a Field/Date Timer is needed create a second sequence to apply the "Start Loop" tag



Pro Tip! Because the restart tag is applied in a different sequence line you wont run into the "Single Looping Line issue". Read more here

Why this setup over other ways of creating a loop?

This method is more reliable than the Tag Goal -> Sequence -> Tag Goal, because when goals are achieved simultaneously, there is a margin of error in which the can trigger the start goal before the end goal, causing contacts to drop.

It is also more secure than Tag Goal -> Sequence -> Sequence -> Tag Goal, while most single line loops work, a contact can start into the first sequence before the end goal is achieved. Once it is achieved, the contact would be removed.

By using two separate tags, and two separate sequences, we can ensure that the contact will loop properly

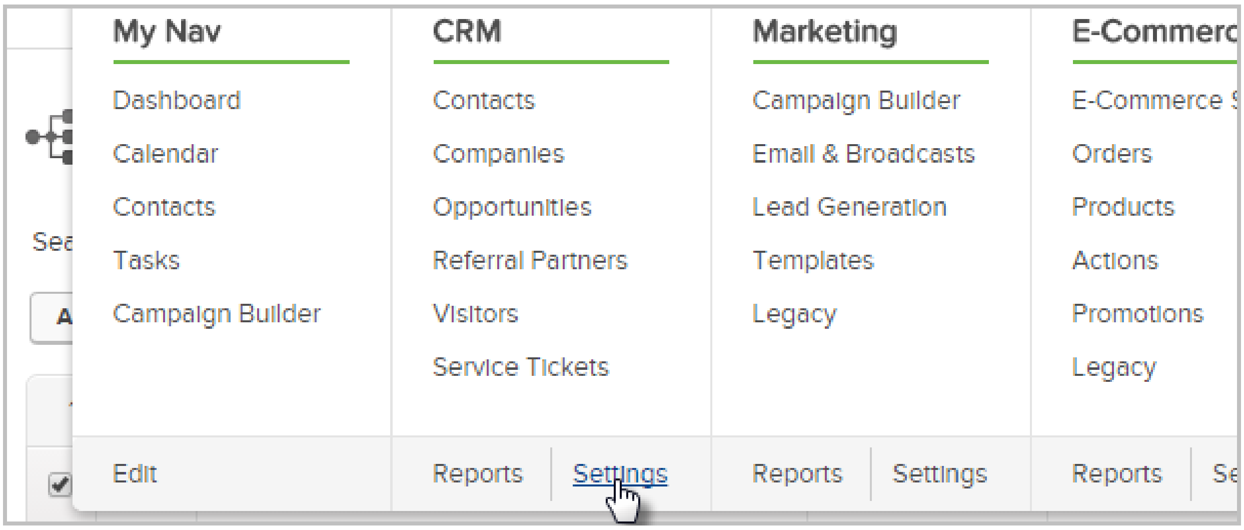
Using a different version of Infusionsoft? Click Here to learn more

How To Create Action Sets And Rules

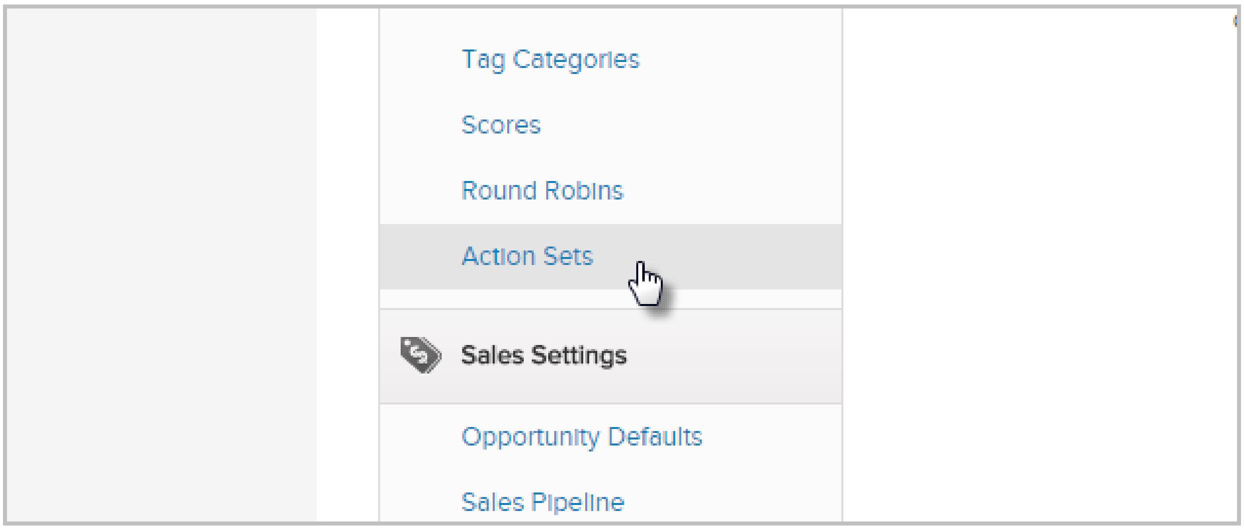
Last Modified on 07/23/2018 1:23 pm MST

Action sets can be used both inside and outside of a campaign in order to give you access to additional actions. The most common uses are to create orders for up-sells or running an action if a field is blank.

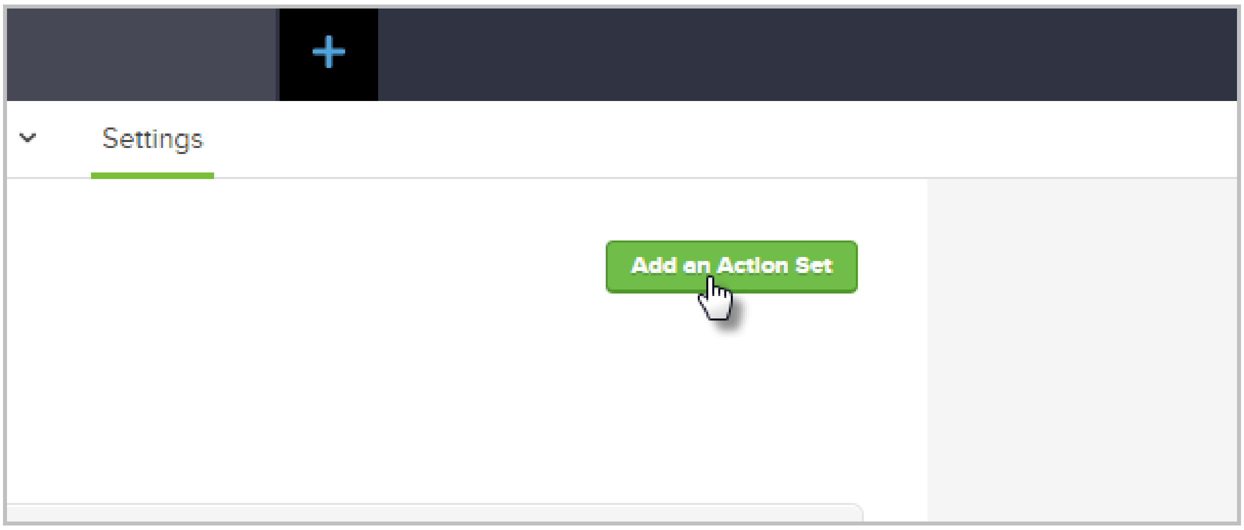
1. Navigate to CRM > Settings



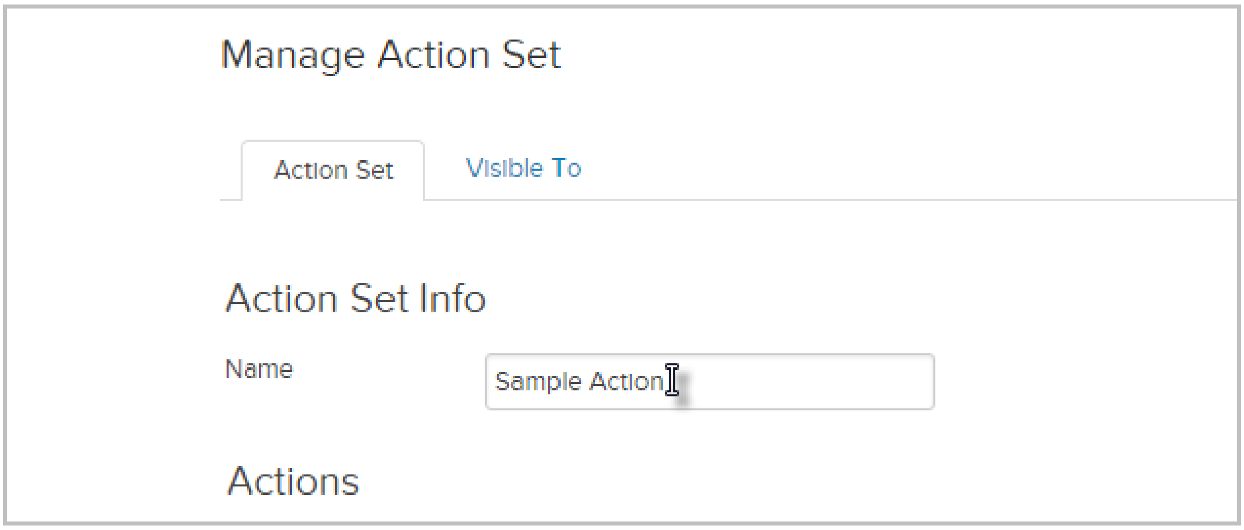
2. Click on **Actions Sets** in the column to the left



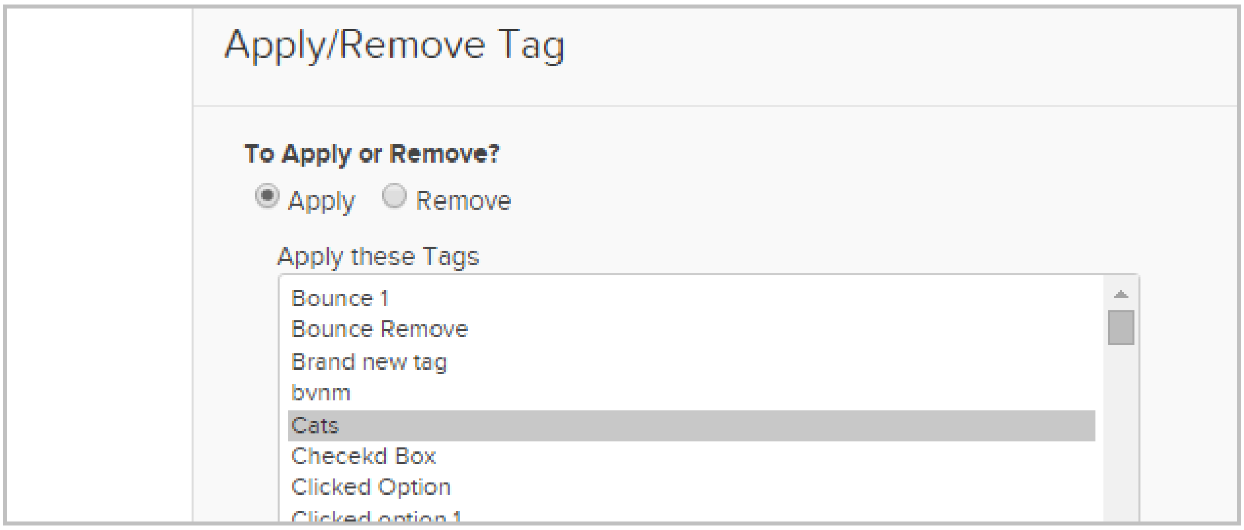
3. Click on **Add an Action Set** in the top right



4. Name your action set

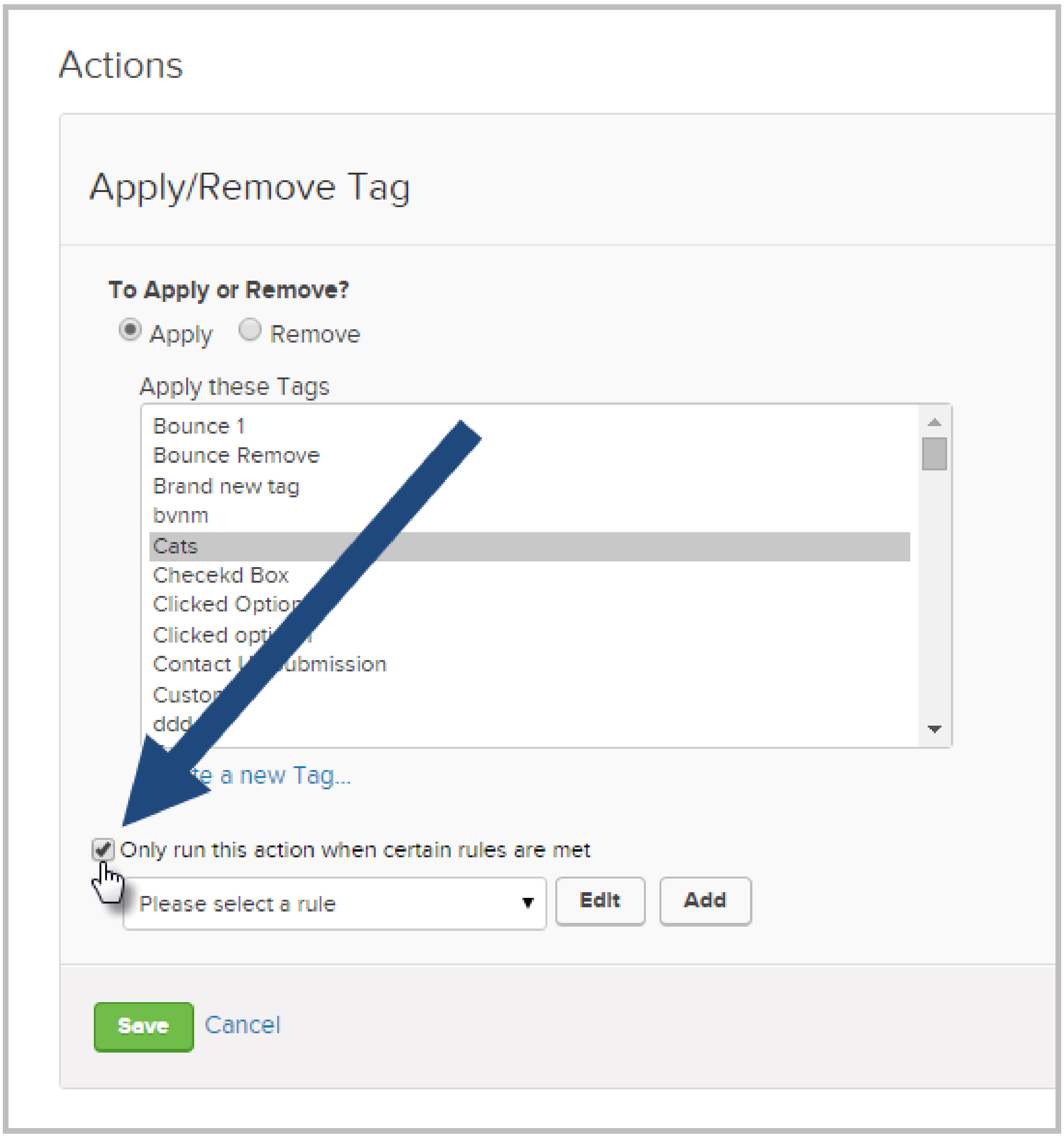


5. Select an action from the Add New Action drop-down. In this example, we chose an action that Applies a tag to the contact.

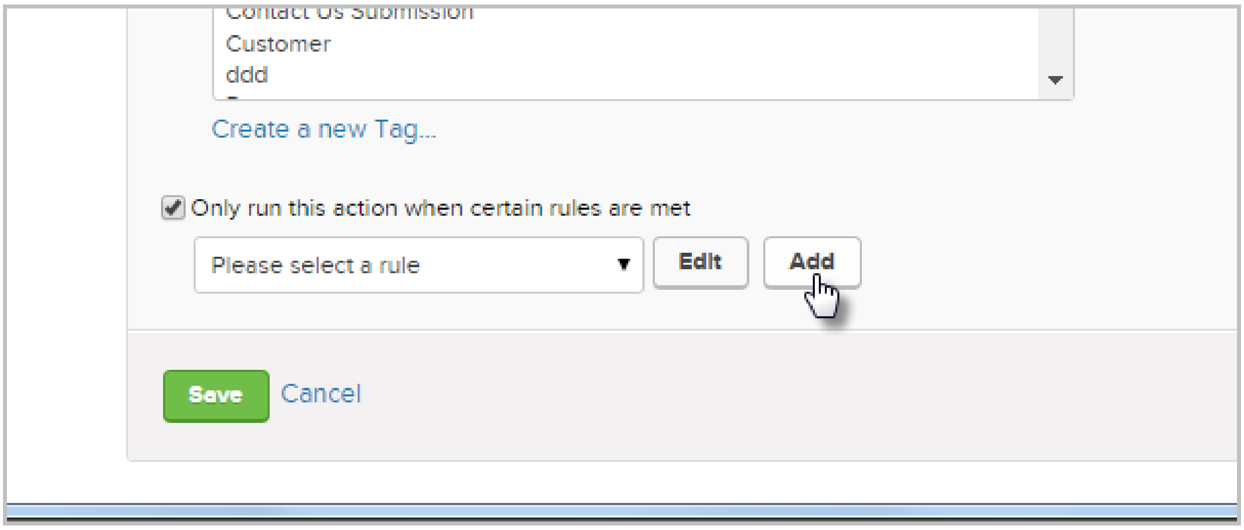


6. (Optional) Set a rule

1. Click on **Only run this action when certain rules are met** checkbox

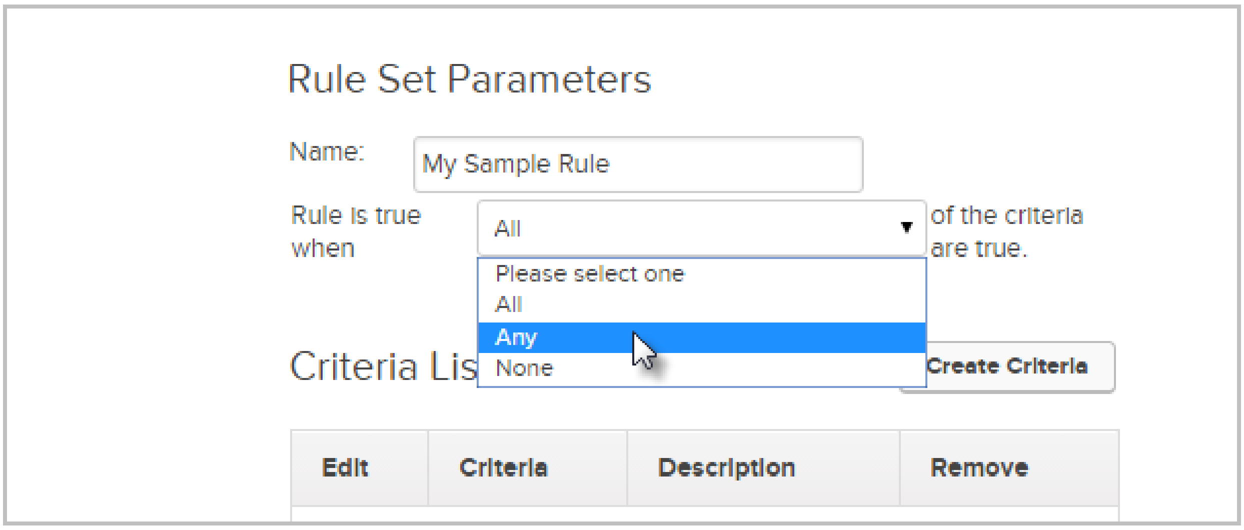


2. Click **Add** to create a new rule.



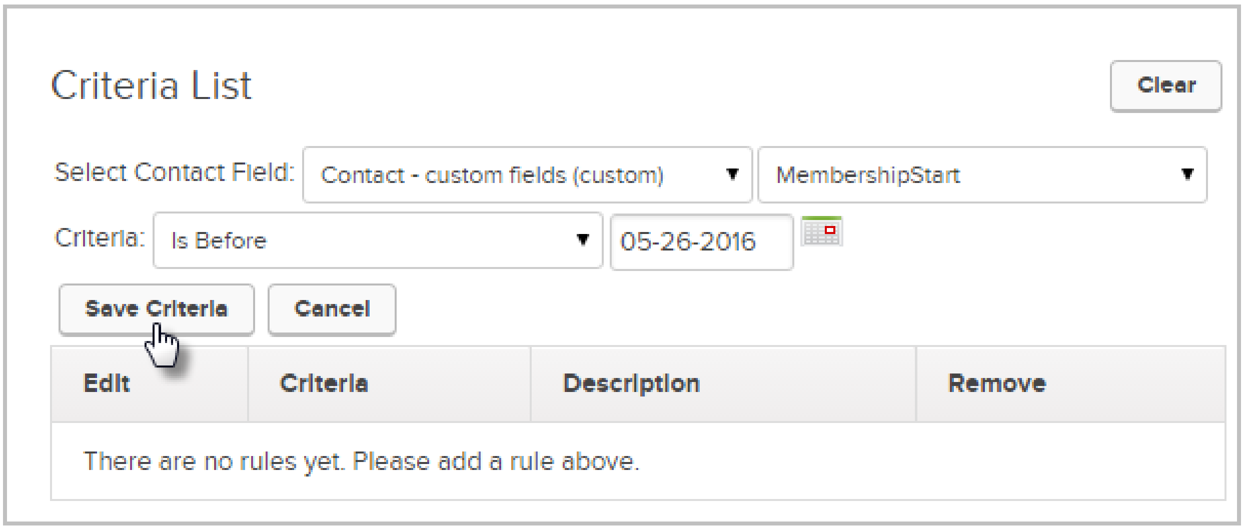
3. Name the rule

4. Choose if the rule is true when *all*, *any*, or *none* of the criteria is true. You can create multiple criteria and use this logic to determine when the action is run.

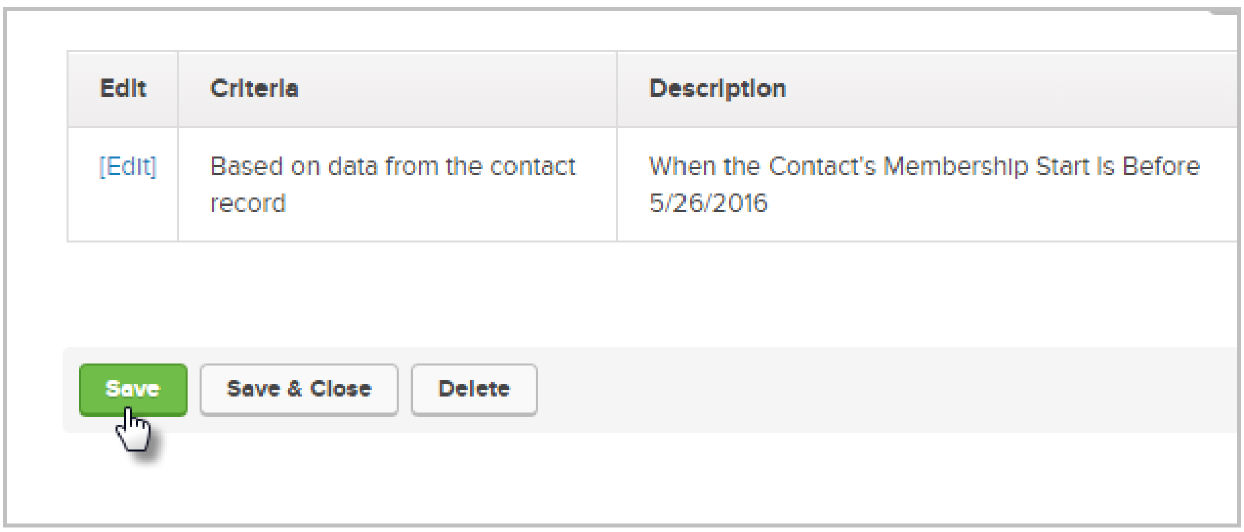


5. Click **Create Criteria**

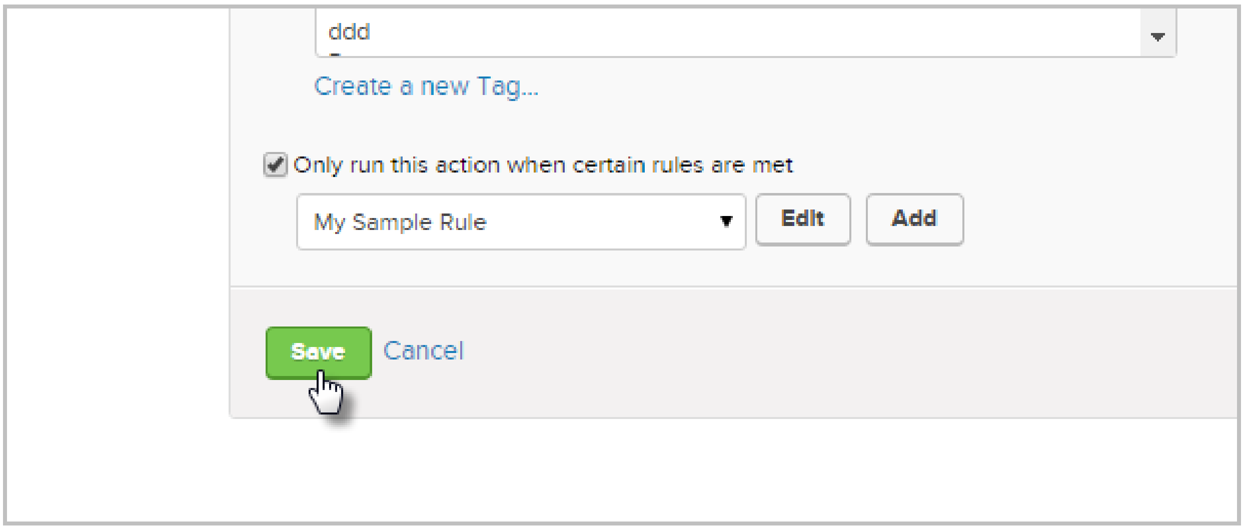
6. Select the field you want to run the rule on and set the criteria. ClickSave Criteria when you are done.



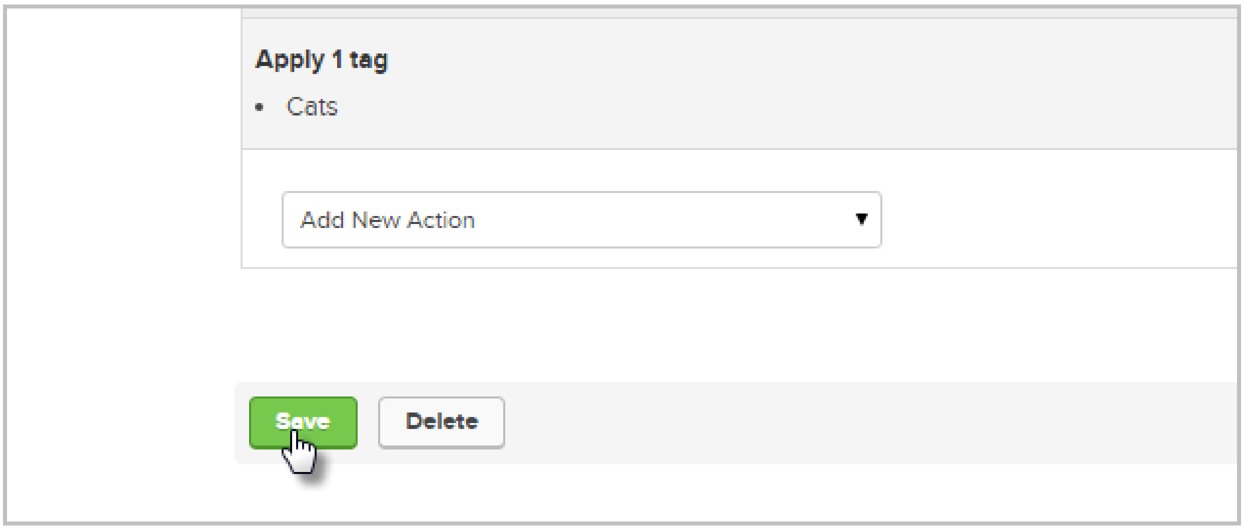
7. Click Save



7. Click Save on the action



8. Click **Save** on your action set



Using a different version of Infusionsoft? Click Here to learn more

Purchase A Product Or Service For Another Guest Or Attendee

Last Modified on 07/23/2018 1:25 pm MST

Use case: Selling tickets to Seminars and Training events where the buyer is not necessarily the attendee.

Please Note! This only works with Order Forms as the shopping cart requires a lot of customized code to achieve different thank you pages based on product being purchased

1. Create A Product. This will be the ticket given in the example above. Do not know how to create a product, not a problem just follow the steps given in this help article.

2. Create An Order Form And Add Product To It. Do not know how to create an Order Form, not a problem. Just follow the steps given in this help Article.

   Pro-tip! An Order Form Theme will need to be created prior to creating the Order Form

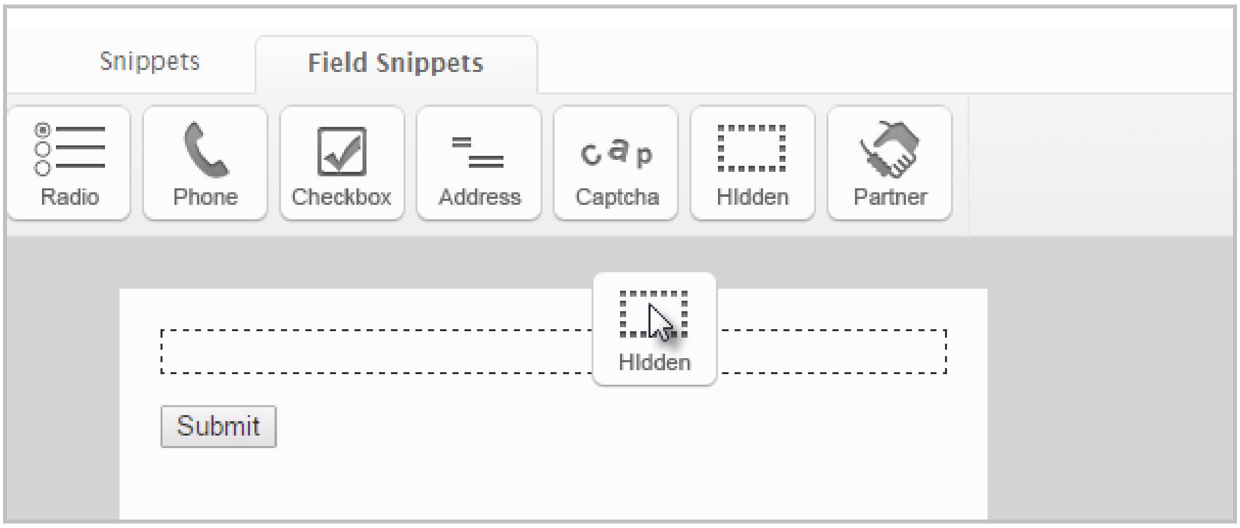
3. Create Custom Fields For Guest Attendee Information. For example, create fields for "Attendee/Guest First Name", "Attendee/Guest Last Name", etc.

   Please Note! If there is the possibility for more than one Attendee/Guest then create sets of custom fields for each possible submission. Otherwise data will be overwritten each time the Web Form is filled out.

4. Create Campaign
   1. Add a web form

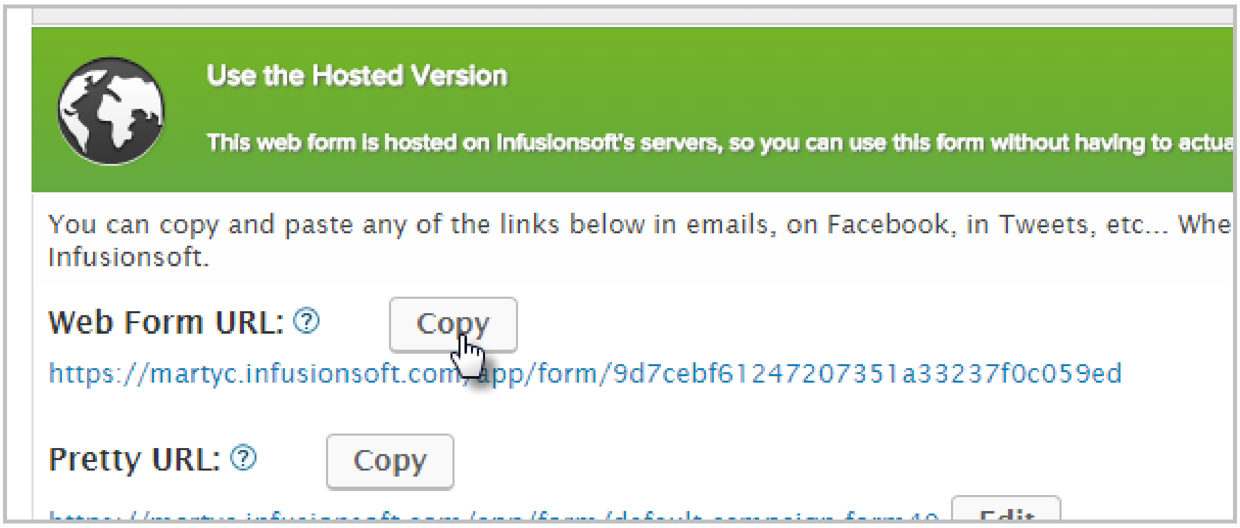
   2. Add all designed fields you would want to collect for the Attendee/Guest

3. Add email field as a hidden field. Drag out the "hidden" field snippet and set this to "Email" and leave value blank.



4. When form is submitted the field values will be saved to the contact who submitted the information

5. Before leaving the web form settings, click on the "Code" tab and copy the "hosted link", you will need this later



6. Drag out a new sequence and connect this Web form to it. Add a "Fulfillment List" process to the sequence.

7. Remove all unnecessary fields

8. Add all of the fields from the Web From

5. Add Web Form URL to Order Form's Thank You Page. Navigate back to the Order Form and click on the **Thank You Page** tab then set drop down to **Web Address**. Paste in the

Web Form URL.

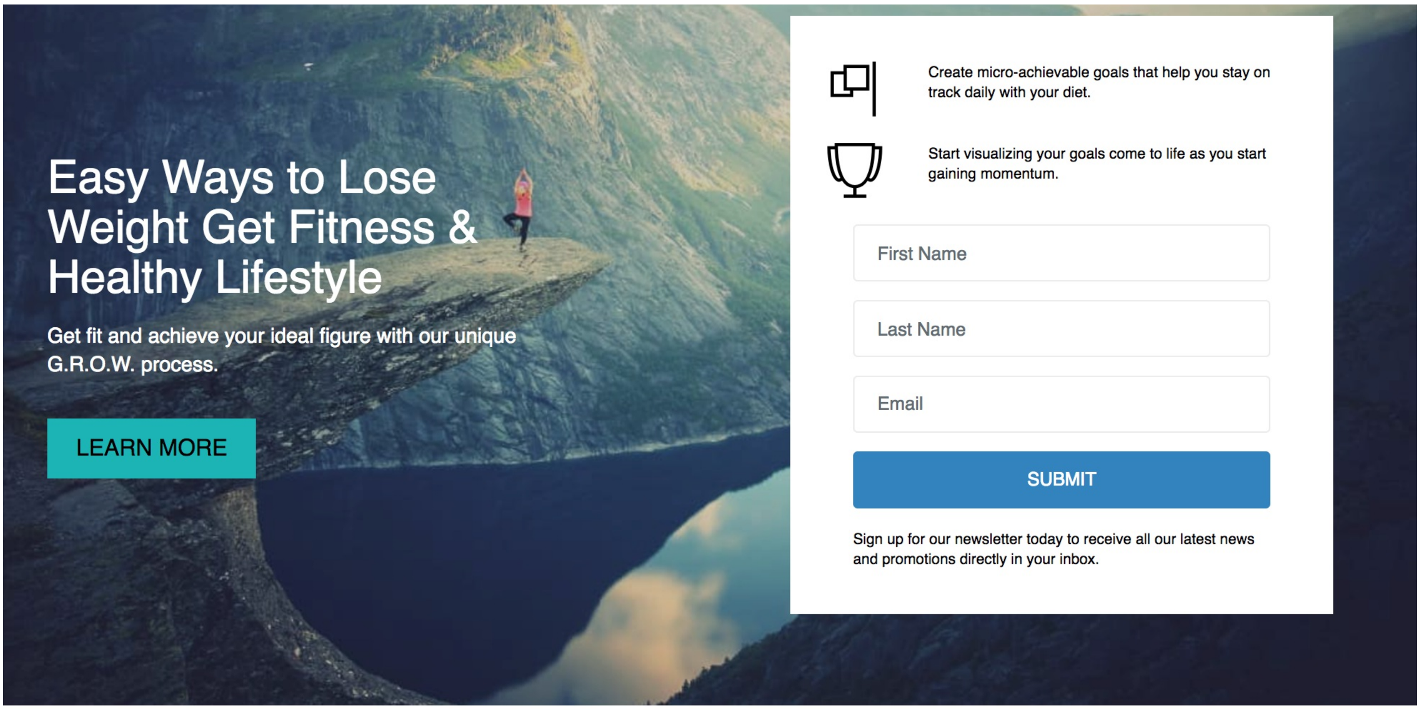
6. Click **Save**. You are now ready to promote your order form and collect attendee data.

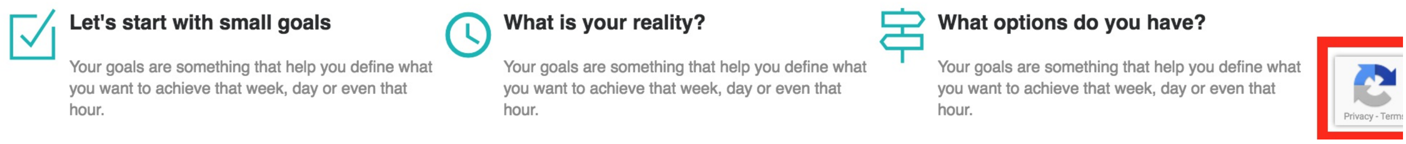
Using a different version of Infusionsoft? Click Here to learn more

Invisible reCAPTCHA Update In Infusionsoft

Last Modified on 07/23/2018 1:25 pm MST

Infusionsoft web forms and landing pages have been updated to utilize Google's Invisible reCAPTCHA . This below icon will be visible in the lower right corner of the web page that includes an Infusionsoft web form, or a landing page that has Invisible reCAPTCHA support.

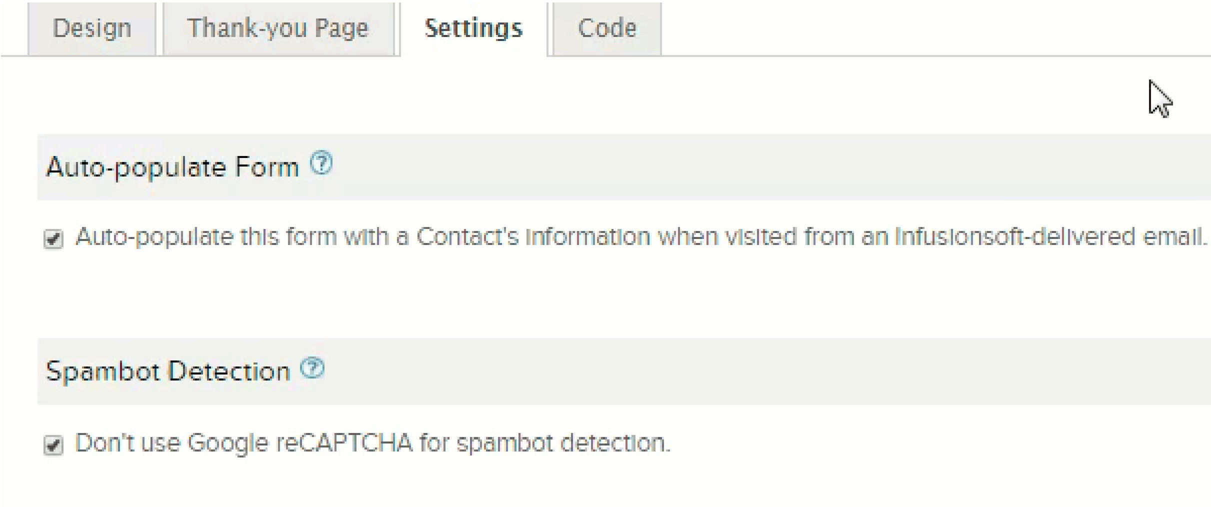




This improves Infusionsoft's spam bot detection on all Infusionsoft web forms and landing pages to prevent spam emails from entering your application. With a reduction in spam submissions we can ensure our apps contain valid contact information resulting in better email deliverability. Google invisible reCAPTCHA is built to watch for suspicious behavior on your form or landing page and only prompts verification when suspicious behavior is detected. To learn more about Google Invisible reCAPTCHA, please visit https://www.google.com/recaptcha/intro/invisible.html.

This feature has been automatically updated within your application and will apply to all new webforms and landing pages that are created moving forward, but in order to benefit from Google's Invisible reCAPTCHA on existing forms, please follow the instructions listed below. Taking these steps will ensure the best security on your page or web form, while having the lowest inpact on form submissions

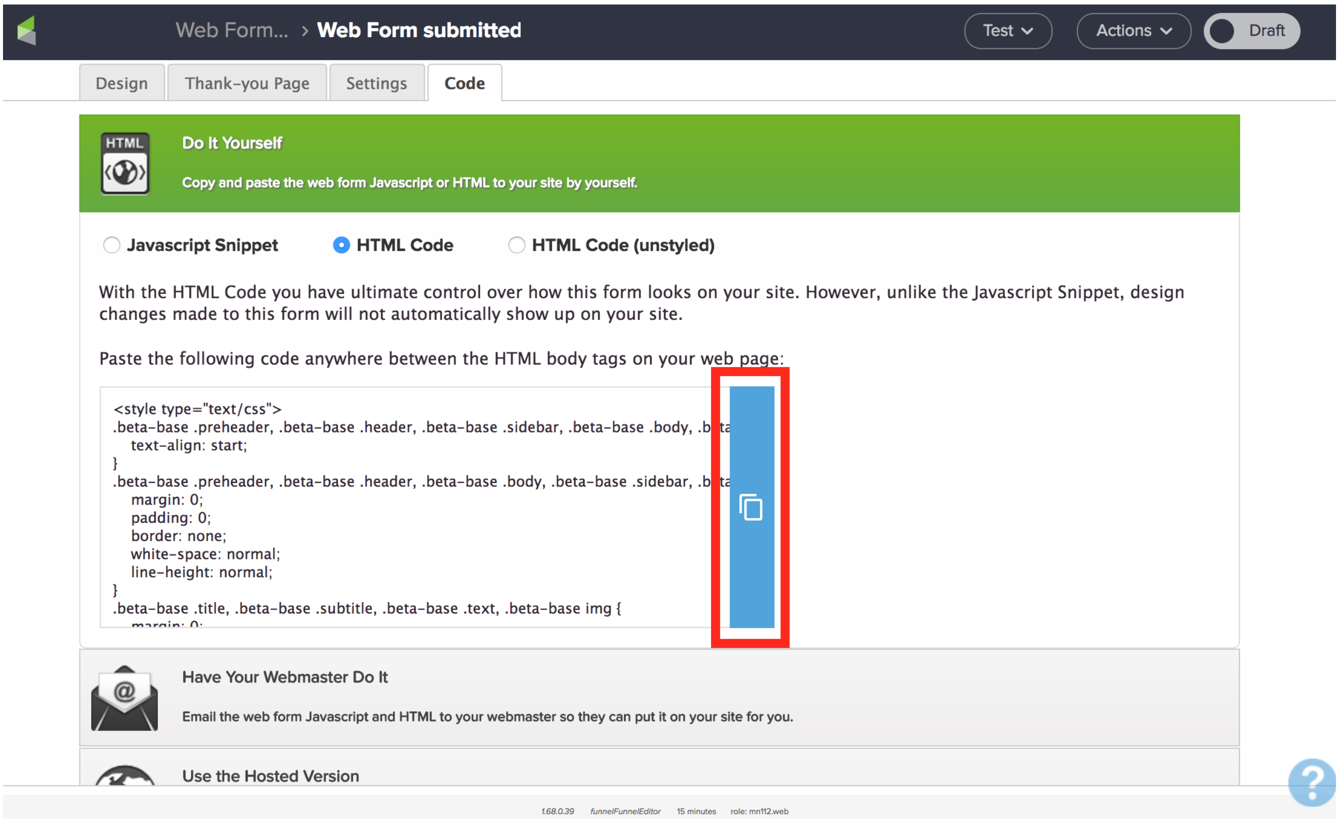
If you have previously disabled bot detection and now want to benefit from the Google Invisible reCAPTCHA update, navigate to the Settings tab on your landing page or web form goal and deselect "Don't use Google reCAPTCHA for spambot detection"



HTML Code

To update web forms or landing pages using the HTML Code, copy the updated HTML code (which includes Invisible reCaptcha support) found on the Code tab of your web form and landing page campaign goal and re-paste it into any external web pages referencing your Infusionsoft web forms and landing pages

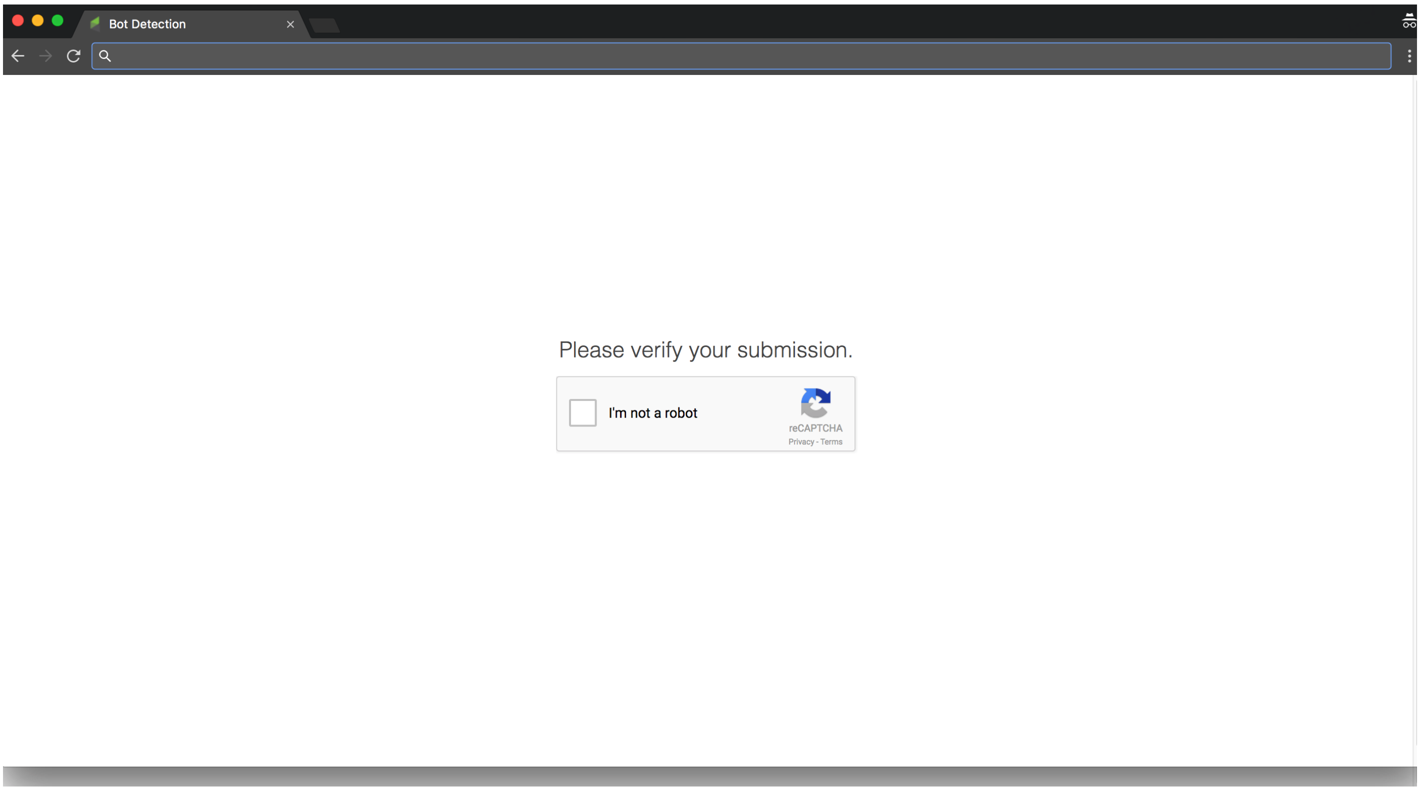
1. Navigate to the campaign with the web form or landing page goal you want to update
2. Double click on the web form or landing page goal
3. Navigate to the Code tab
4. Click on the HTML Code radio button
5. Copy the HTML code by clicking on the blue copy icon to the right of the code box.



6. Navigate to your website where the original web form or landing page HTML code is pasted
7. Paste the copied HTML code
8. Enjoy Increased Security
9. **Important Note!** If you have modified the HTML or CSS associated with the HTML code from Infusionsoft, you will need to re-style or customize the newly pasted HTML code to match.

JavaScript Snippet

No action is necessary if you have pasted the JavaScript snippet on your external web pages, however, form submissions using JavaScript snippet will be redirected to a second Infusionsoft hosted webpage for bot detection. After a user checks the "I'm not a robot" checkbox, they will be redirected to the Thank You page associated with the web form or landing page you are using. If you want to benefit from Google's Invisible reCAPTCHA and avoid the need of a page redirect, you will need to replace the JavaScript snippet with new HTML code on your website. To update your code, see above instructions.



(Bot detection redirect page from Javascript snippet submission.)

Hosted Web Forms & Landing Pages

No action is necessary if you are using the hosted versions of your Infusionsoft web forms or landing pages. Google's Invisible reCAPTCHA will automatically be enabled on these web forms and landing pages.

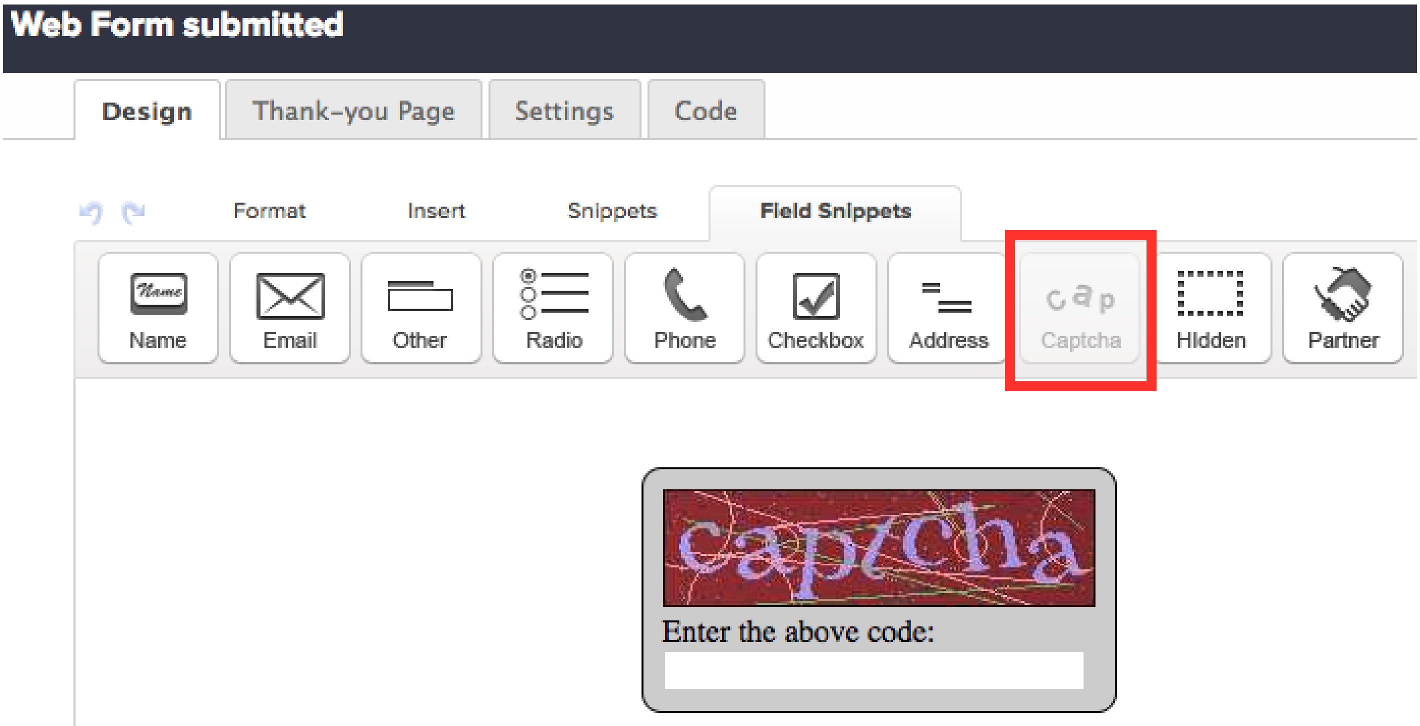
Using HTTP Posts

If you are using HTTP post functionality within Campaign Builder to send data from one Infusionsoft application to another, this will continue to work.

If you are using HTTP post functionality to send data from an Infusionsoft application, to your own server, and then back to Infusionsoft, you must use the API to ensure this works moving forward.

Remove Outdated CAPTCHA from Web Form and Landing Page Editors

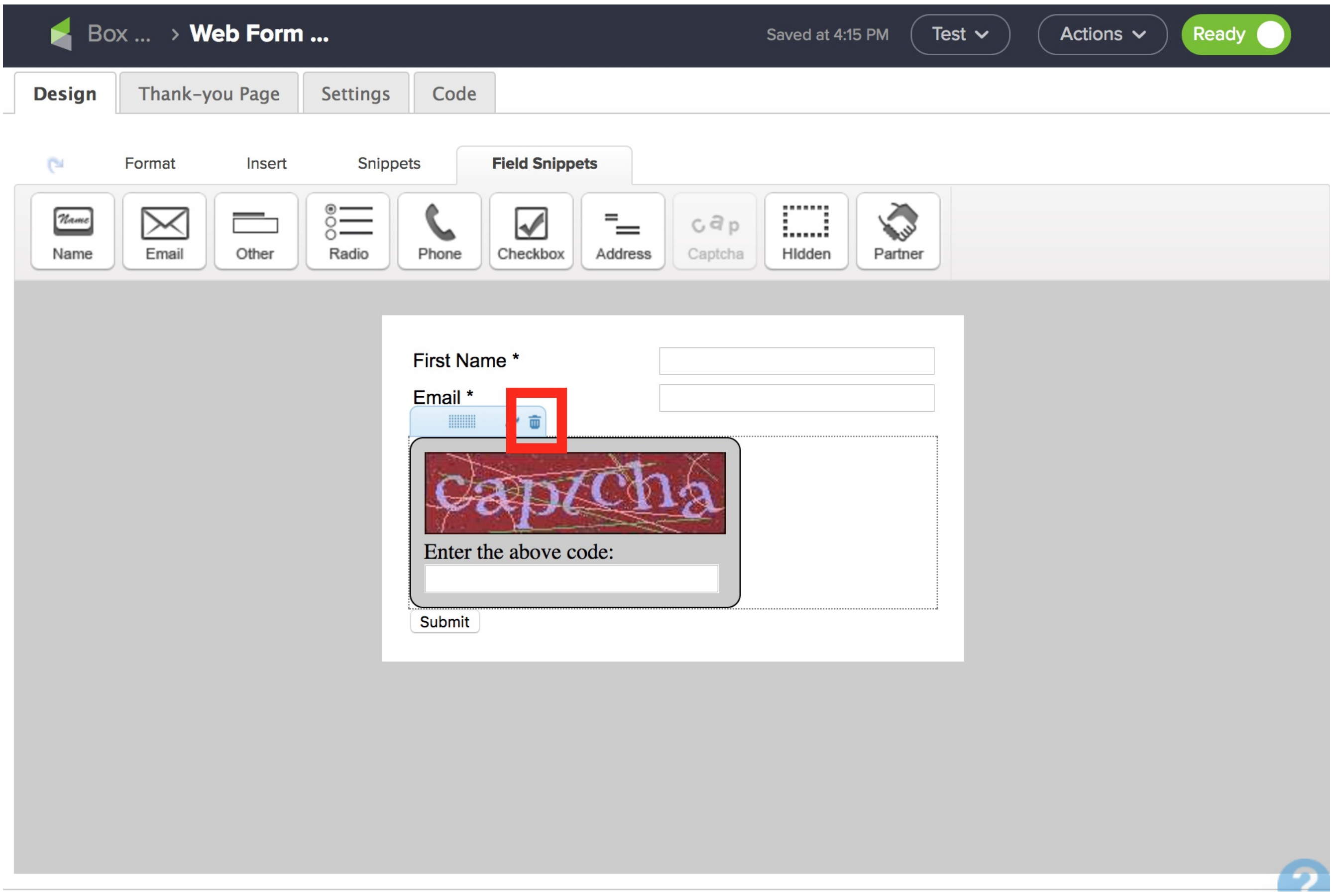
The following Captcha Field Snippet has been removed from the web form and landing page builders



Infusionsoft has updated to Google's Invisible reCAPTCHA and wants to ensure there is only one, reCAPTCHA for your page visitors to see. Any currently published web forms and landing pages that include the old style captcha will continue to work. If you are using the old CAPTCHA field snippet on any web forms or landing pages, you must remove it from any existing web forms and landing pages by following the steps below and republishing the web form or landing page.

Steps to remove outdated CAPTCHA from existing Landing Pages and Web forms:

1. Navigate to the campaign with the web form or landing page goal you want to update
2. Double click on the web form or landing page goal
3. Navigate to the Design tab
4. Hover over the outdated captcha field snippet and click on the trash can



5. Re-publish your campaign
6. Follow steps from the instructions above for adding Google Invisible reCAPTCHA

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Campaign Builder Checklist

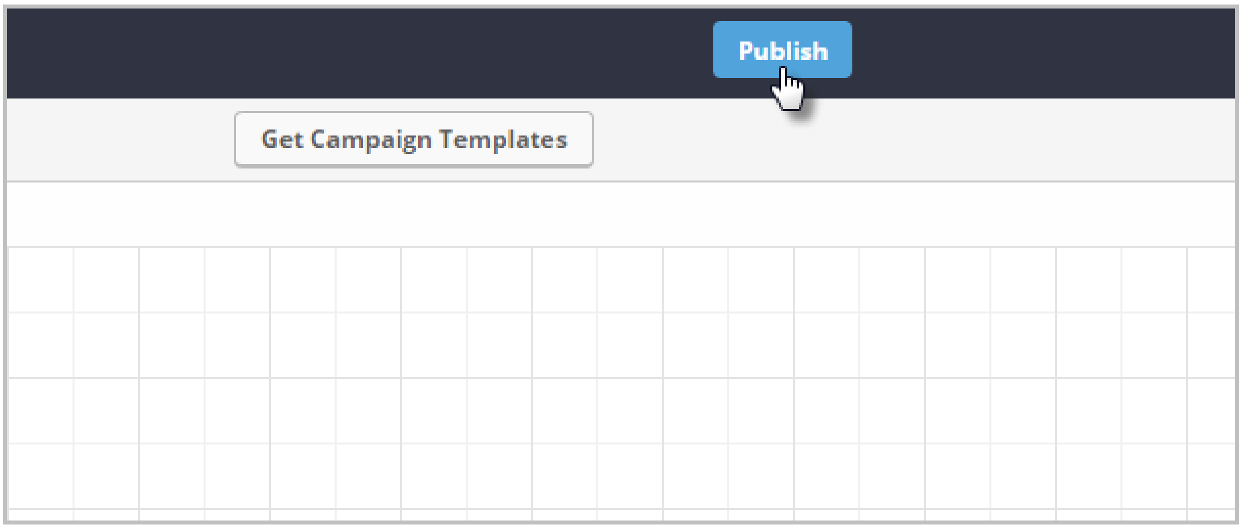
Last Modified on 07/23/2018 1:28 pm MST

The Campaign Checklist helps you feel more confident hitting the 'Publish' button by automatically reviewing your campaign for common errors. Additionally, if a campaign contains a tag entry goal to start the campaign, Infusionsoft will prompt you to add contacts that have never been in the campaign, but contain the tag in their contact record.

The Campaign Checklist automatically checks the campaign upon hitting the Publish button. The Campaign Checklist will check for the following errors:

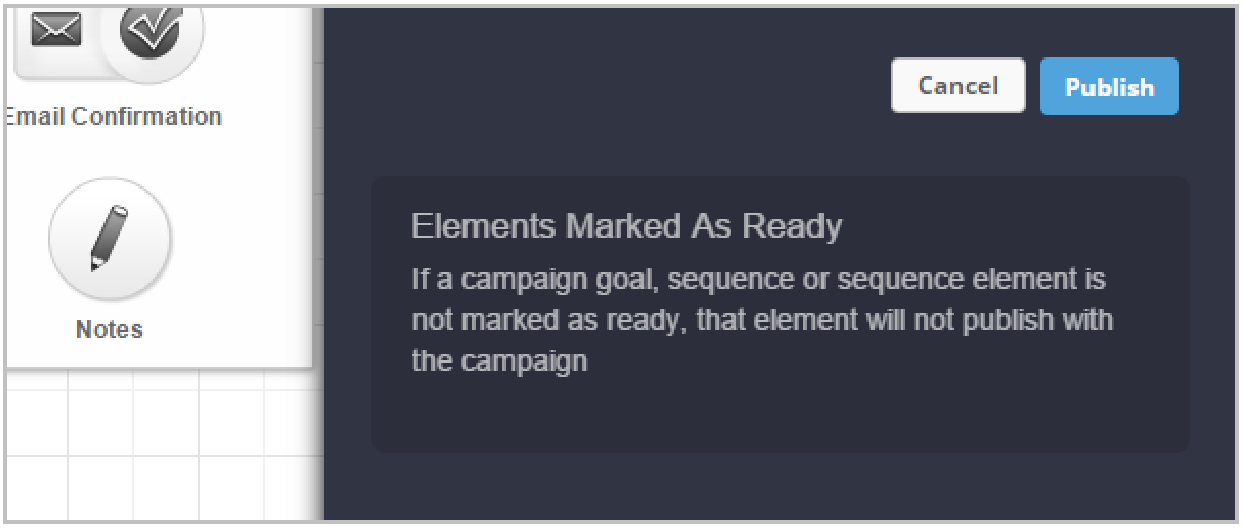
- Elements Marked As Ready: Checks all campaign elements (goals, sequences, items within sequences) to verify they are marked as ready and configured correctly.
- Campaign Elements Are Connected: Checks all campaign elements (goals, sequences, items within sequences) to verify they are connected to each other so that the campaign runs as it was intended.
- Email Delivery Frequency: Checks to verify that there is a timer between emails or that there is some sort of user action required between emails so that your customers do not receive multiple emails at once.
- Emails Are Personalized: Checks all emails to verify that a Contact Merge Field or Custom Contact Merge Field is used within the email ensure all emails are personalized.
- Email Merge Fields Are Correct: Checks that all merge fields (Contact, Owner, Company) are correct and not invalid.

1. Click on the **Publish** button

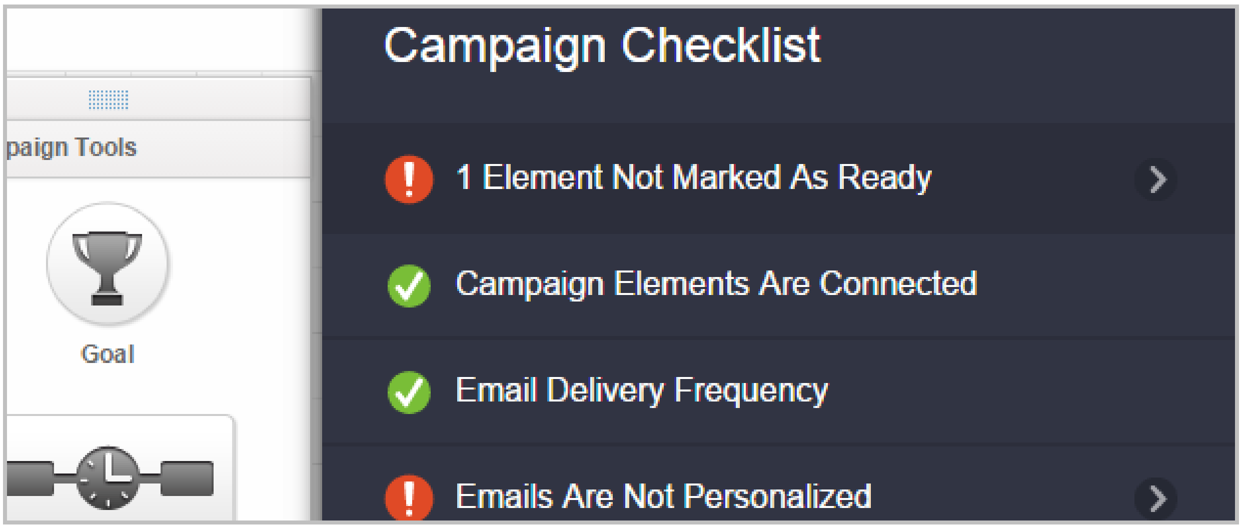


2. A new panel will slide in from the left-side of the screen with four animated messages: Analyzing Campaign, Checking Sequences, Checking Emails, Checking Timers.

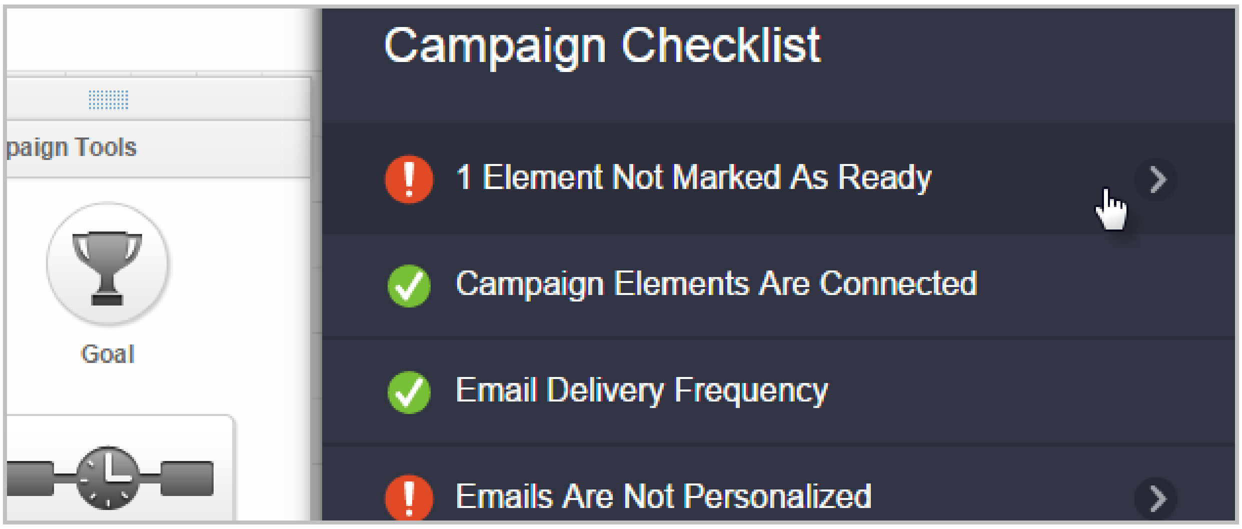
3. Next, the Campaign Checklist will appear. Hovering over any of the main checklist items will result in an explanation block to slide in from the left within the panel, below the Cancel and Publish buttons.



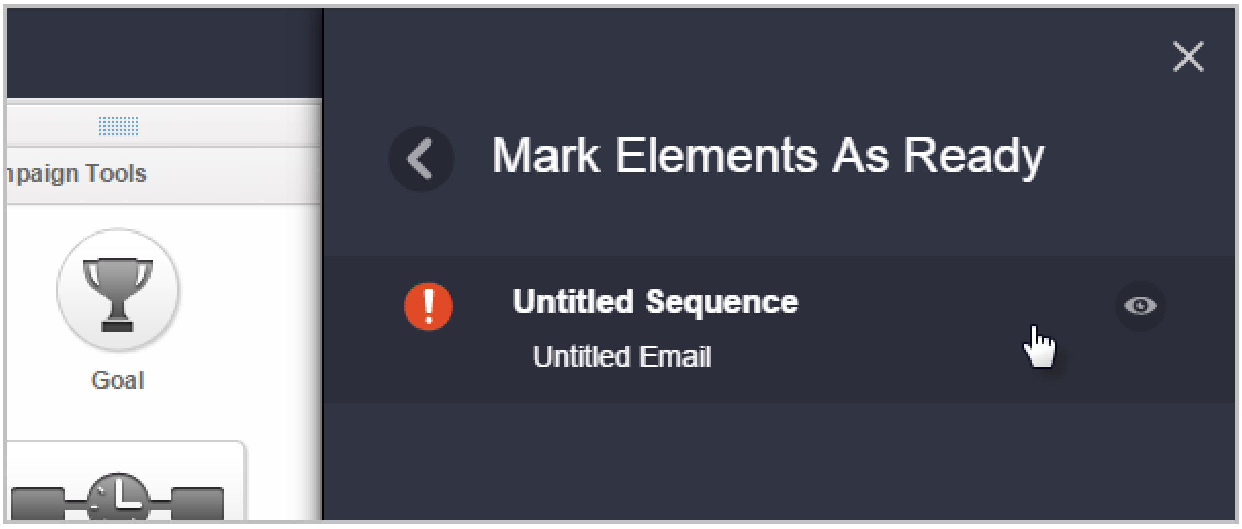
Any items that need attention will have a red exclamation icon next to it. Any items that were analyzed and no errors were identified will have a green check mark icon next to it.



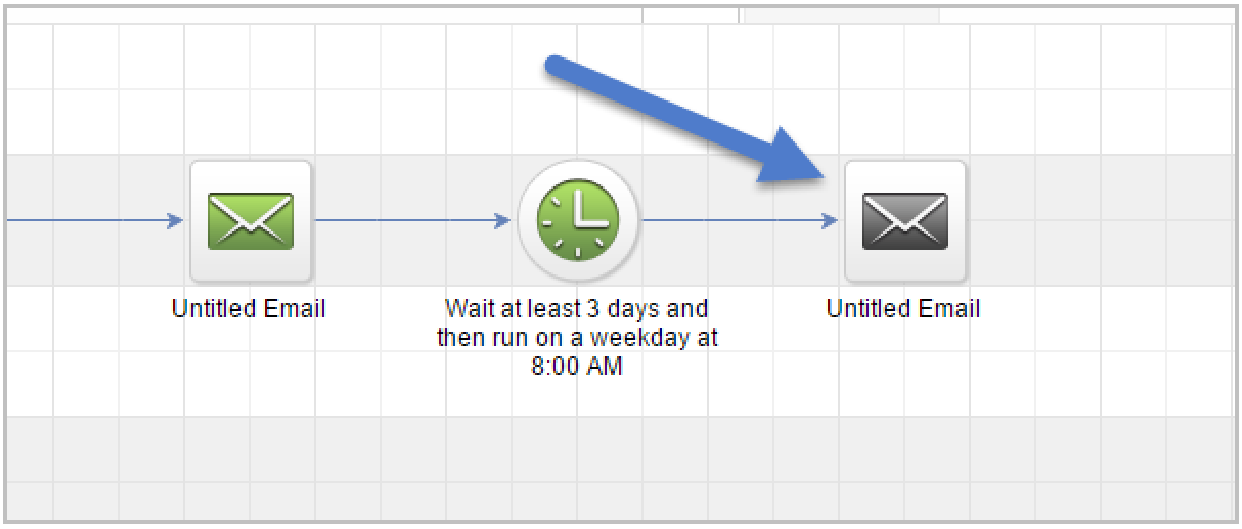
4. Click on the arrow next to an item with an error to see the details of the problem(s).



5. When you click on an individual problem, you will be taken to that part of the campaign in order to fix the error.



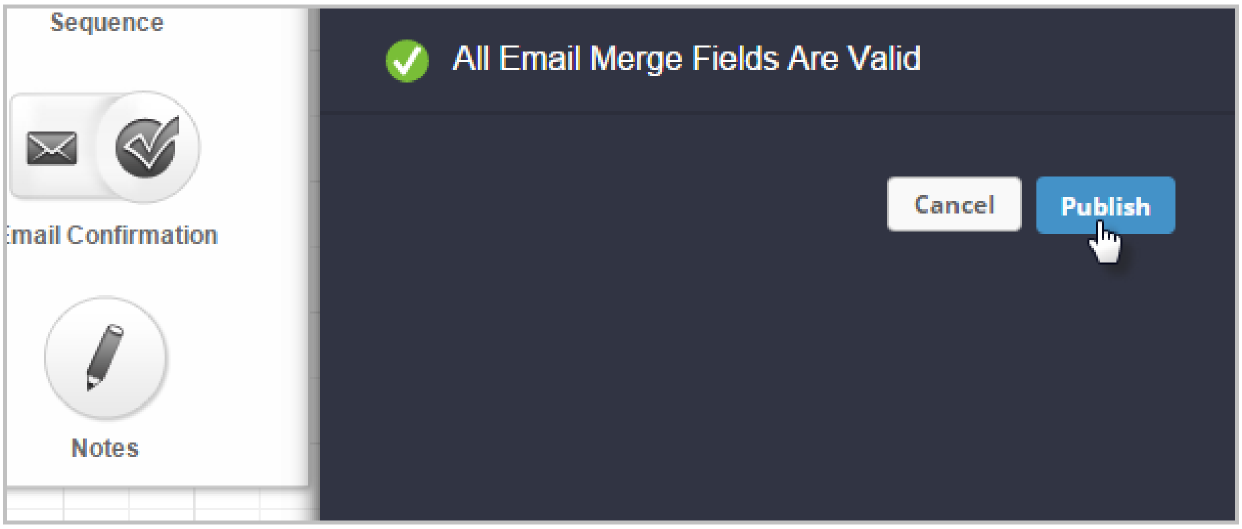
6. In this example error, the email was never finished, nor marked as Ready.



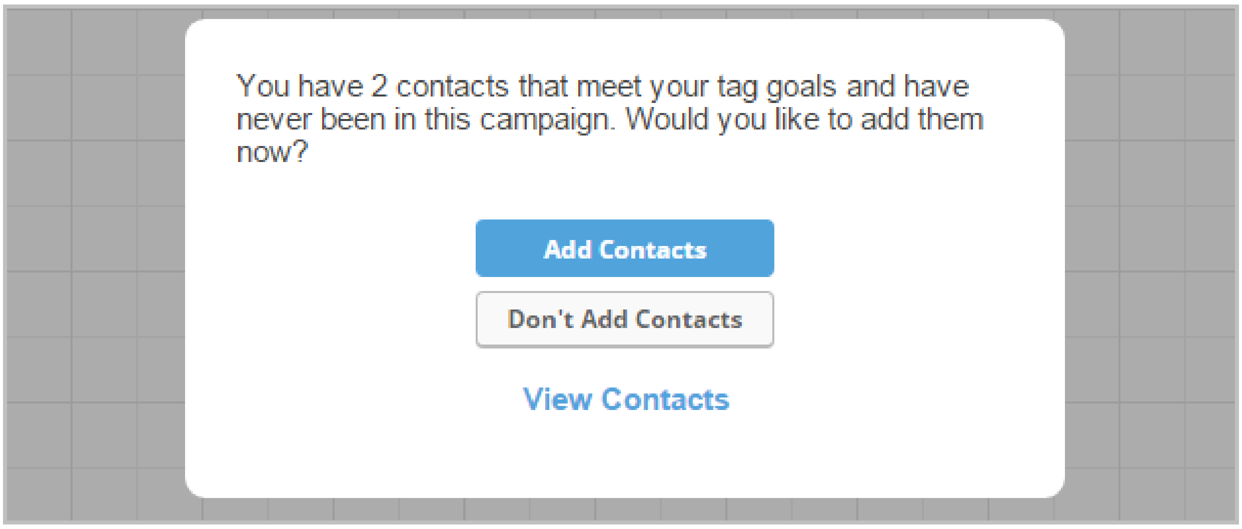
7. Once you have corrected the issue and backed out of the element (email, timer, sequence) then the Campaign Checklist will automatically update and the previously

erroneous item will disappear.

8. Once all errors are fixed, click the Publish button once more.



9. If you have a campaign that contains a tag entry goal, a box box will drop-in indicating that there are X number of contacts that have never been in the campaign, but that contain the tag that starts the campaign (for example, you may have imported 200 contacts with the "New Lead" tag and are ready to publish your "New Lead Follow-Up Campaign".)

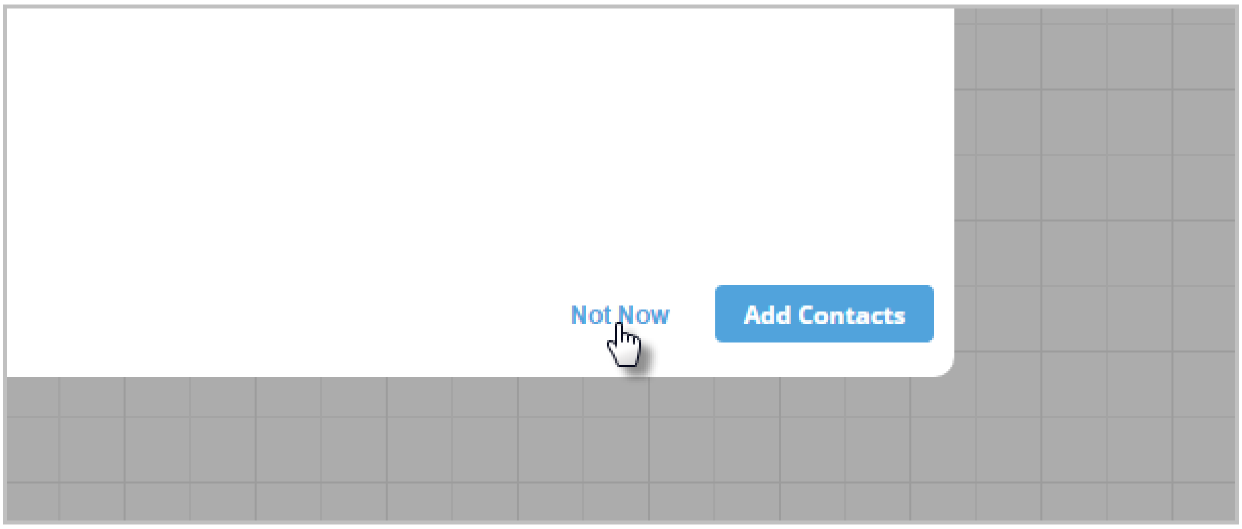


10. You can choose from the following options:

    - **Add Contacts:** Add the contacts and continue publishing the campaign. All identified contacts will be added to the campaign into the sequence that's connected to the tag entry goal.
    - **Don't Add Contacts:** The campaign will be published but the contacts will not be added to the campaign.
    - **View Contacts:** You can view the individual contacts that could be added to the

campaign.

11. If you choose to View Contacts, you will have the option choose Not Now or Add Contacts and Publish after reviewing them.



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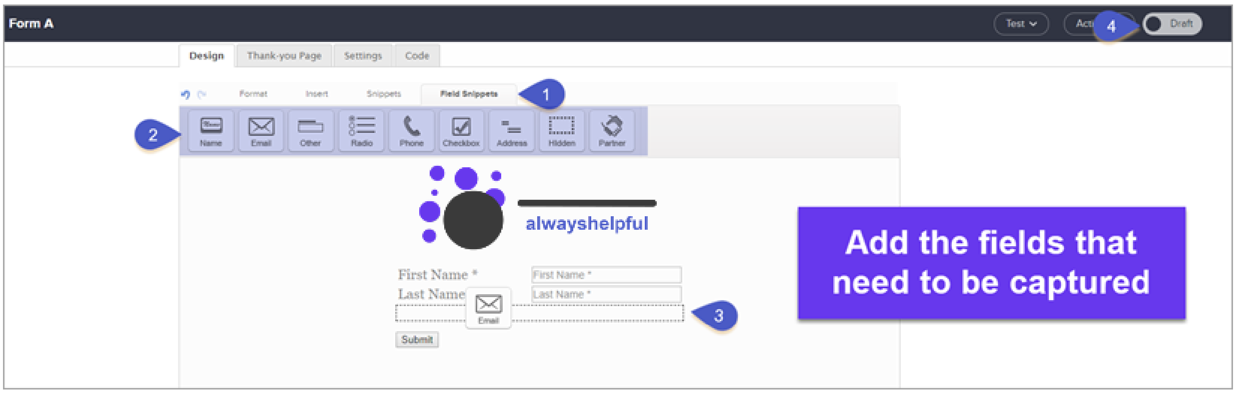
How To Link Web Forms Together

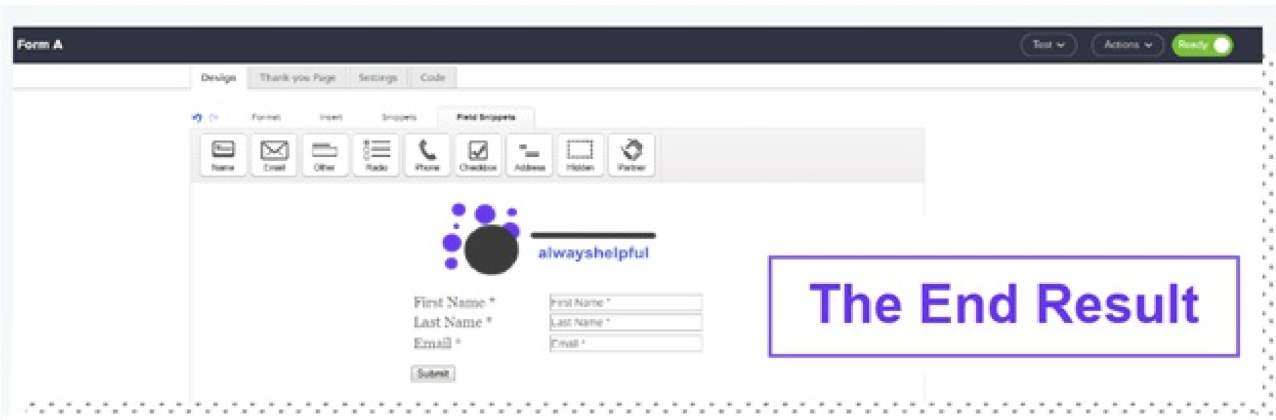
Last Modified on 07/23/2018 1:29 pm MST

Here are the steps to use when linking multiple Web Forms together using the Hidden Field Snippet.

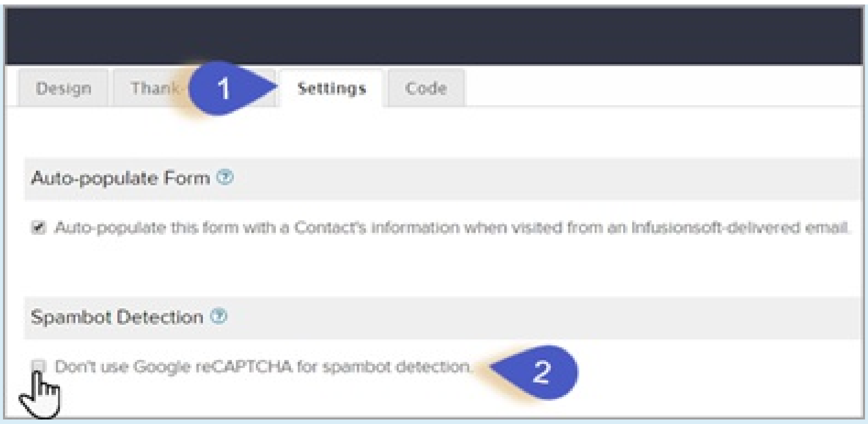
Create web form capturing information to be passed

- Navigate to Marketing > Campaign Builder
- Click on “Create my own Campaign”
- Click on “Create my own Campaign”
- Name the campaign
- Drag the “Web Form Submitted” snippet onto the canvas
- Enter the name of the form (for this article, Form A
- Double click anywhere on the form, except for the red “x” or the form icon on the bottom left
- Click into “Field Snippets”
- Add the field(s) that need to be captured on the secondary form (e.g. Email)
- Click on “Draft” in the top right to set the form to “Ready”
- Return to campaign canvas



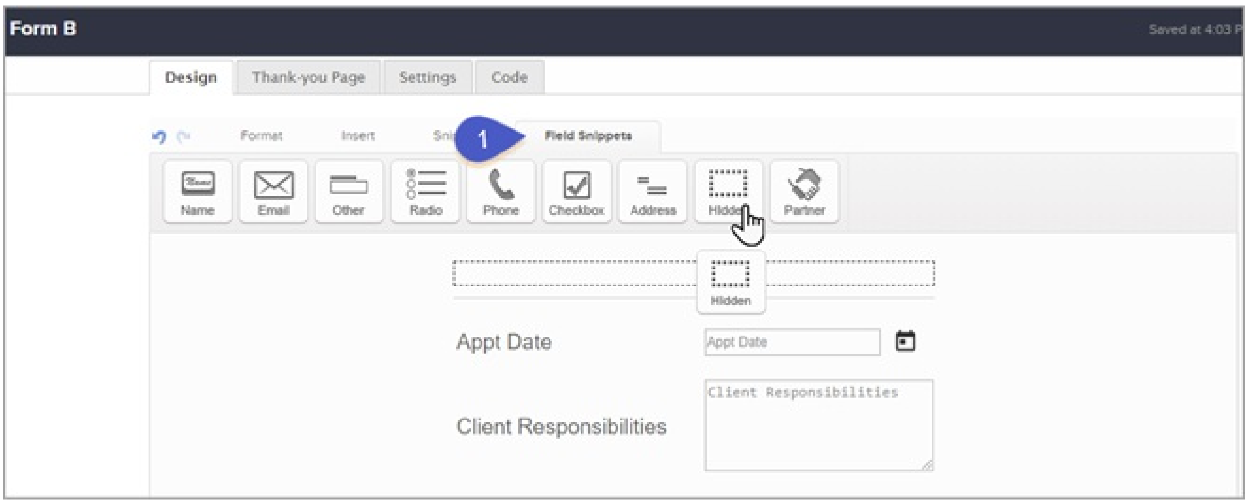


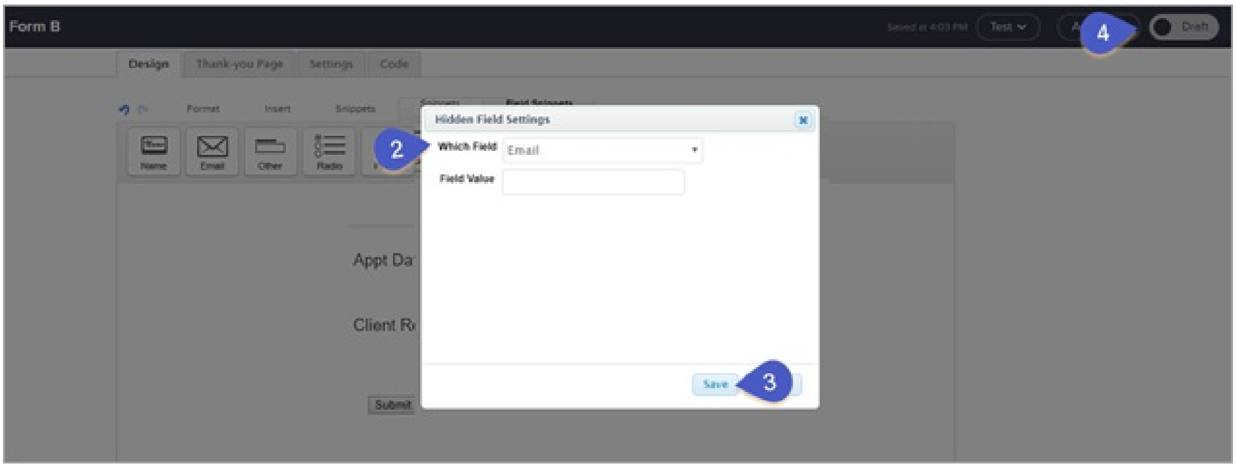
Protip: When linking multiple webforms you can turn off the captcha under the Web Forms "Settings" tab

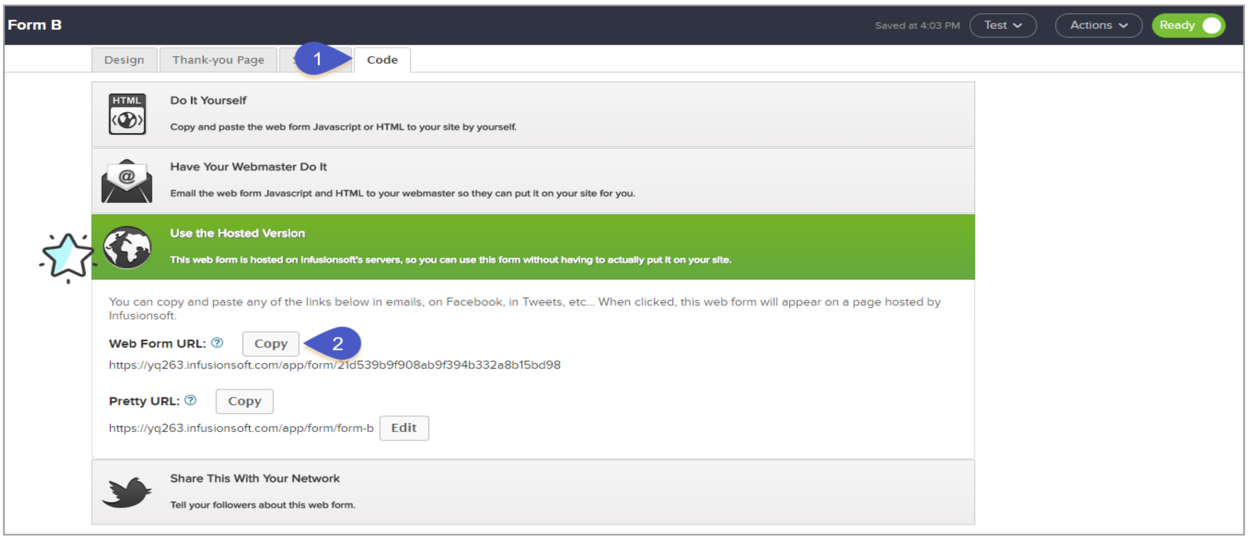


Create a second web form that information is being passed to

- Drag out a second "Web Form Submitted" snippet onto the campaign canvas
- Enter the name of the form (for this article, Form B)
- Double click anywhere on the form, except the red "x" or the form icon on the bottom left
- Click into "Field Snippets"
- Add the "Hidden" field snippet to the form
- Select the field needed from the "Which field" drop down (e.g. Email)
- Do **not** enter a value into the Field Value section
- Click "Save"
- Add whichever other fields need to be captured
- Click "Draft" in the top right to change the form to "Ready"
- Click into the "Code" tab
- Click "Use the Hosted Version"
- Copy the form URL



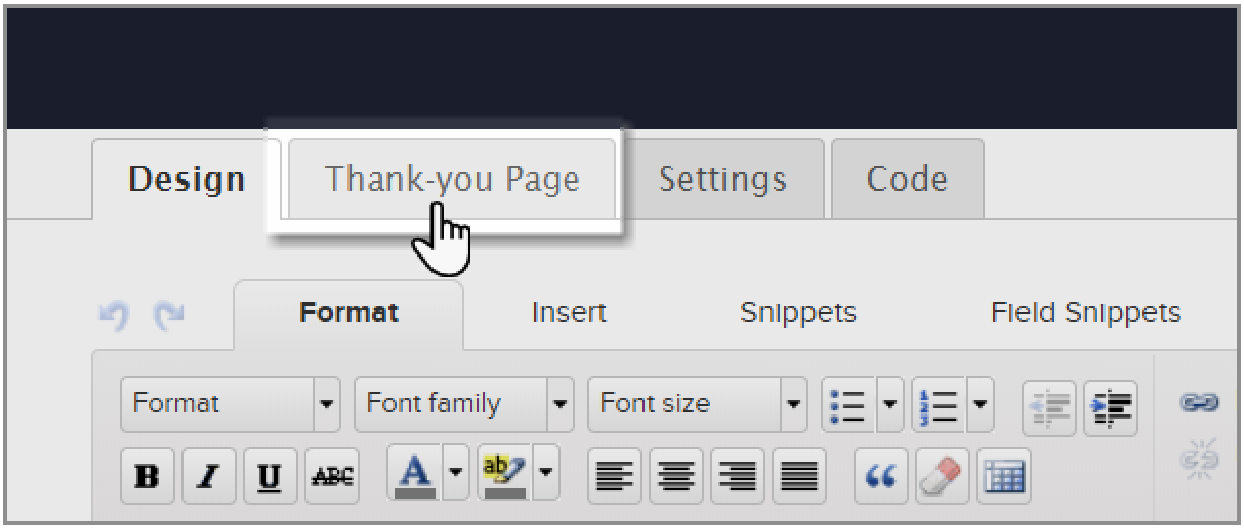


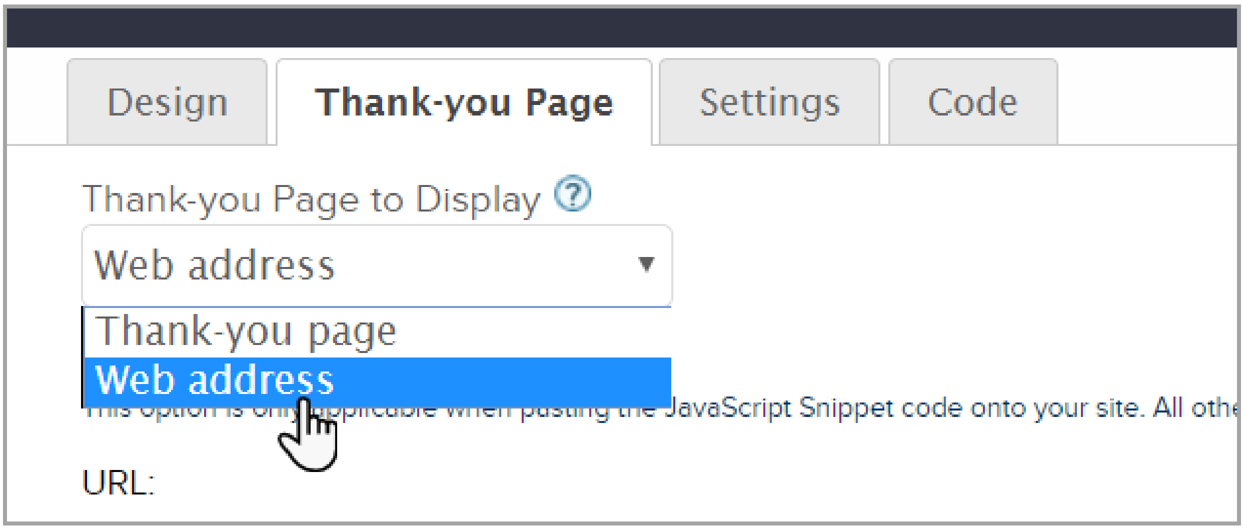


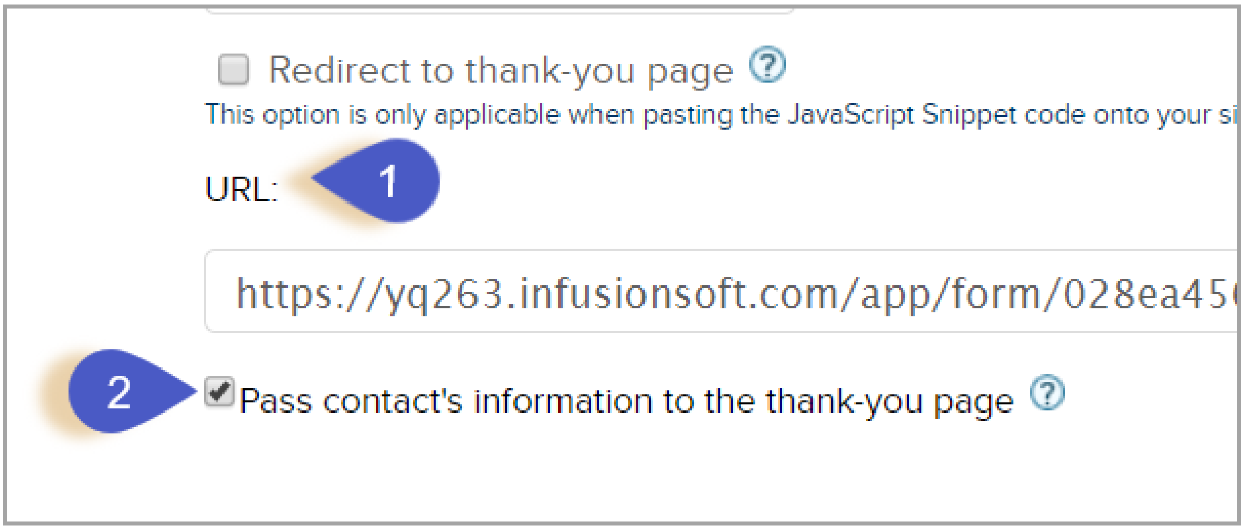
Passing contact information from Form to Form can only be done with the Web Form Hosted URL or Javascript. It will **NOT** pass information when the form is embedded with HTML Code or HTML code (Unstyled).

Set the Thank You Page on “Form A”

- Return to main campaign canvas
- Double click anywhere on “Form A” except for the red “x” for the form icon in the bottom left
- Click into the “Thank-you Page” tab
- Set the “Thank-you Page to Display” dropdown to “Web Address”
- Paste in the copied URL into the URL section
- Check the box to “Pass contact’s information to the thank-you page”

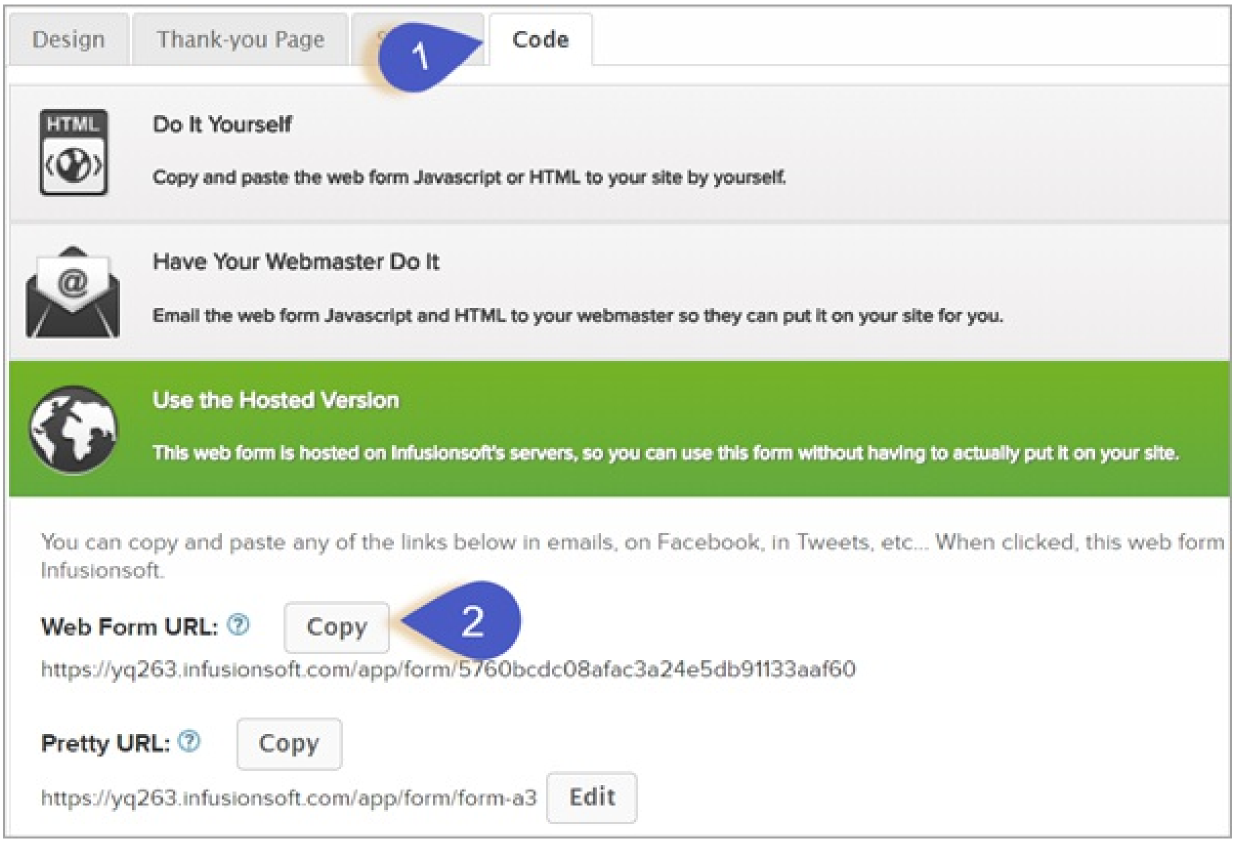






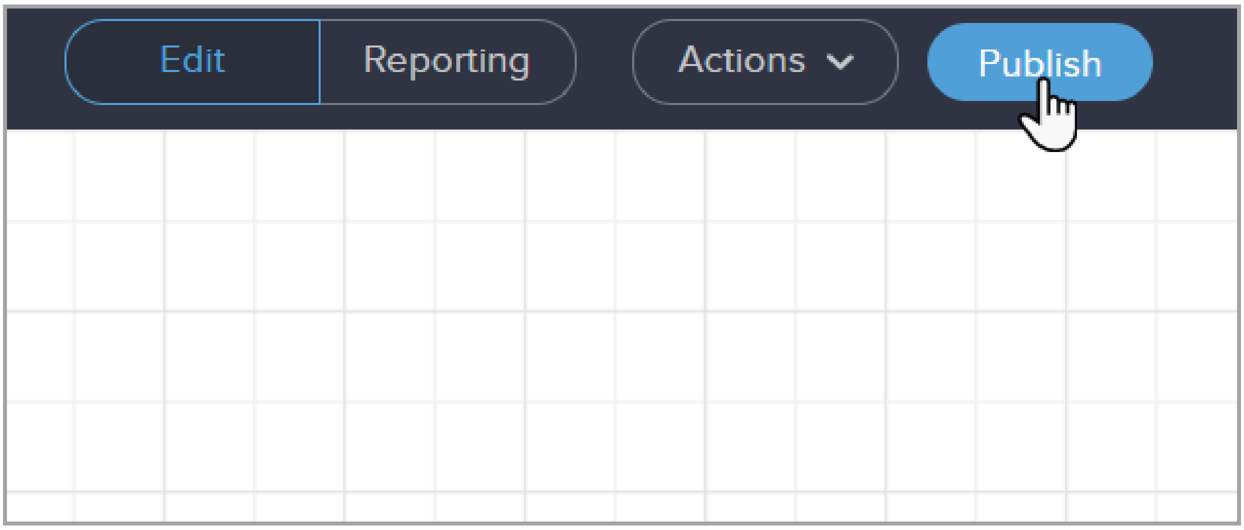
Copy "Form A" URL

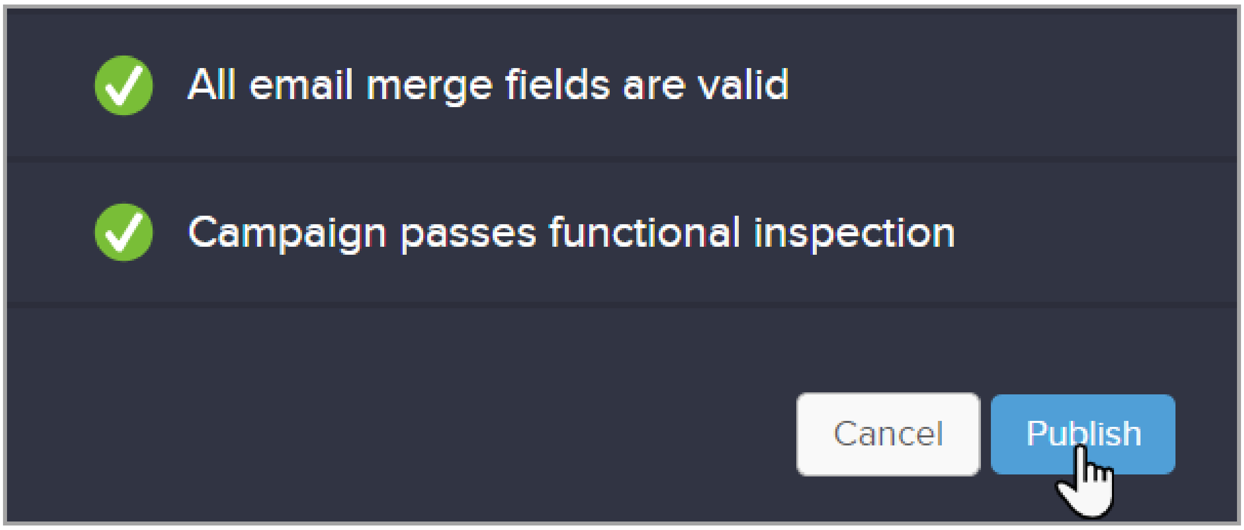
- Click into the “Code” tab
- Click on “Use the Hosted Version”
- Copy the form URL



Publish the campaign

- Return to main campaign canvas
- Click “Publish” in the top right
- Click “Publish” in the checklist

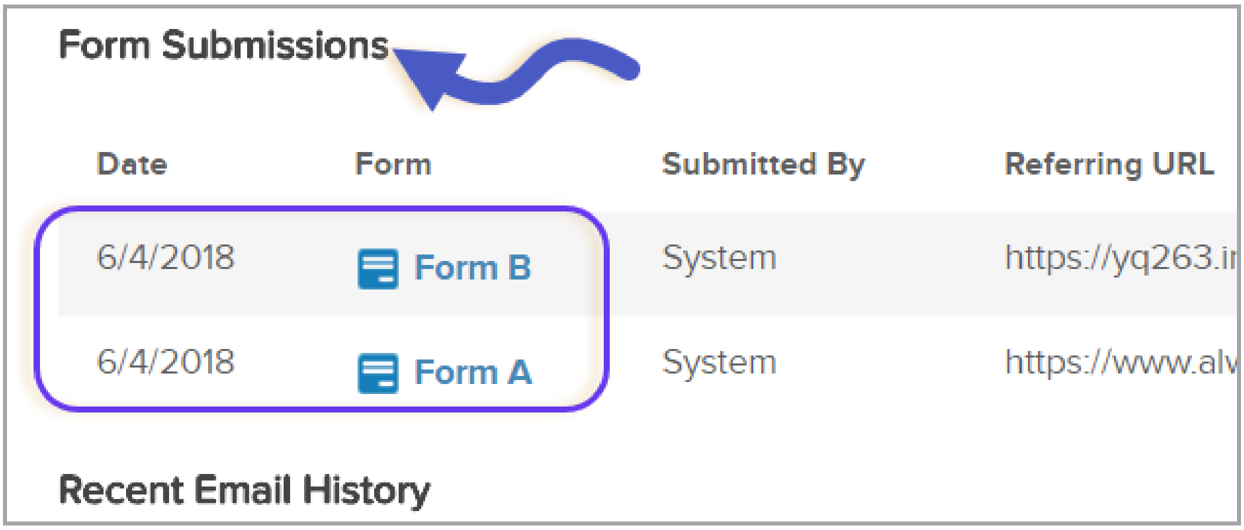




Test the forms to ensure that information is being properly passed

- Open a new tab/window
- Paste in the URL for “Form A”
- Enter values into all of the fields
- Submit the form
- Enter any values on “Form B”
- (Optional) Right-Click > Click "View Source" > followed by Ctrl+F and search for the contacts email address, which will confirm the information is being passed from Form A to Form B
- Submit the form
- Return to application
- In the quick search in the top right, search for the name/email address you submitted on the form
- Click on your contact record

- (Optional) If not defaulted, click on the “Tasks” tab
- Scroll to the “Form Submissions” section above the “Recent Email History”
- Ensure that both Form A and Form B were recorded on your test contact record



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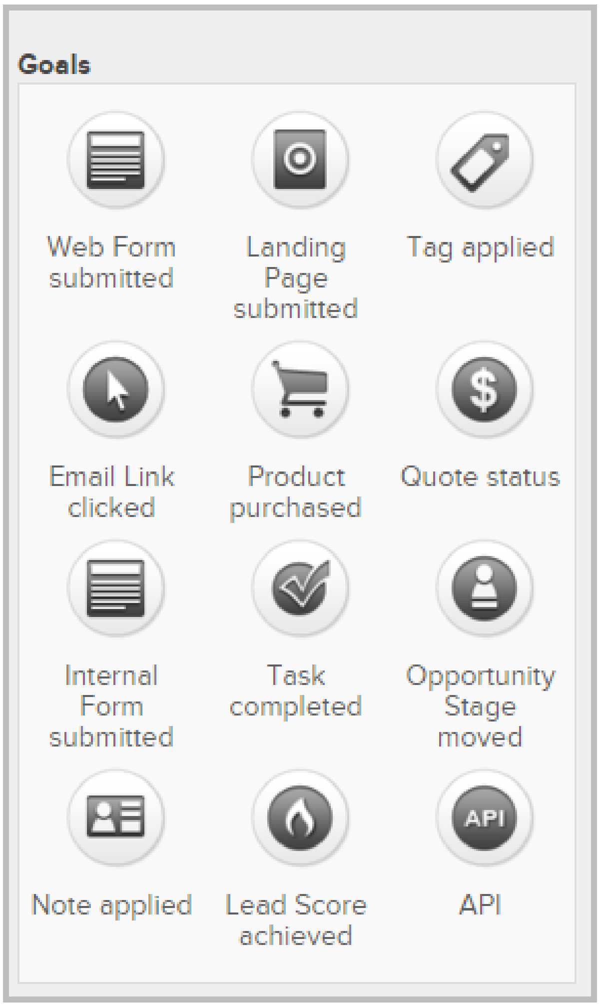
A List of Available Campaign Goals

Last Modified on 07/23/2018 1:30 pm MST

There are many different Goals to choose from. Each goal is briefly described below.



Goals initiated automatically by the Contact...

- **Submits a web form** - Web forms are either hosted on your website, or by Infusionsoft. When a web form is submitted, the goal is satisfied.
- **Submits a Landing Page form** - A landing page is an Infusionsoft hosted web page with a built in web form that can be designed and launched quickly without the help of a webmaster. You can create a multi-column landing page layout and include text,

images, and videos in the content. Contacts usually fill out the form on a landing page. They can also be used as data entry pages for an outsourced call center or contractor.

- **Clicks a link** - The links you add to campaign sequence emails can be sued as goal settings. They are generally used to engage the reader and gauge interest level. When you use a link click as a goal setting, it should be associated with a specific call to action (e.g. contact me or sign me up) so that it is no surprise to the contact when they move to the next stage of your marketing process.

- **Reaches a Score** - If you are using the infusionsoft lead scoring mechanism, you can set this method to be complete when a certain lead score is reached.

- **Purchases a product** - Purchases are tracked when a prospect or customer buys through an Infusionsoft order form or the shopping cart. The goal can be satisfied by a general purchase, the purchase of a specific product, or the purchase of a particular category of products. If you process manual orders, you will need to use an alternative goal setting, like an opportunity stage move or a note.

Goal methods initiated by an Infusionsoft user...

- **Submits an internal form** - An internal form gives you the ability to submit a form on behalf of someone else. Users of your Infusionsoft application can quickly and effectively collect and update contact information using an internal form. Internal forms help automate internal workflows.

- **Completes a Task** - The tasks you add to a campaign sequence can be used to satisfy a Task is completed goal setting. The tasks are generally related to predictable events, like a welcome call after a new customer purchases.

- **Moves an opportunity** - Opportunity stages represent milestones in a sales process and track prospect progression. Sales reps manually update opportunity sales stages based on their personal interaction with prospects. Some of these sales stages may satisfy a campaign goal. You may need to customize opportunity stages before using them as a goal setting.

- **Applies a note** - Notes are manually added to a contact's history to document a specific interaction. Notes include a date stamp as well as a description of the interaction that took place. A note might be added to a contact after a phone call or an in-person appointment, which can satisfy a goal in the campaign sequence. If this personal interaction has more than one possible outcome, you will create multiple goals, each with a unique note assigned to it.

- **Applies a tag** - Tags are searchable labels that are used to segment contacts. They can be updated automatically as part of a campaign sequence or manually by an Infusionsoft user.

Goal methods initiated automatically by an Integration...

- **API Call is made** - The Infusionsoft API enables third-party applications to communicate with Infusionsoft and process incoming data for a wide variety of uses.

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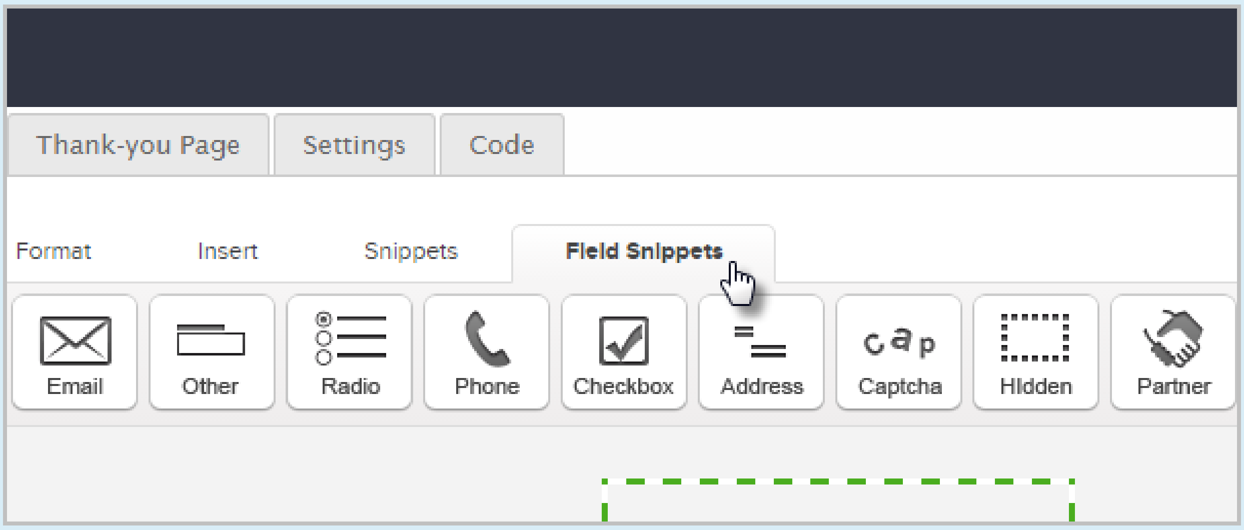
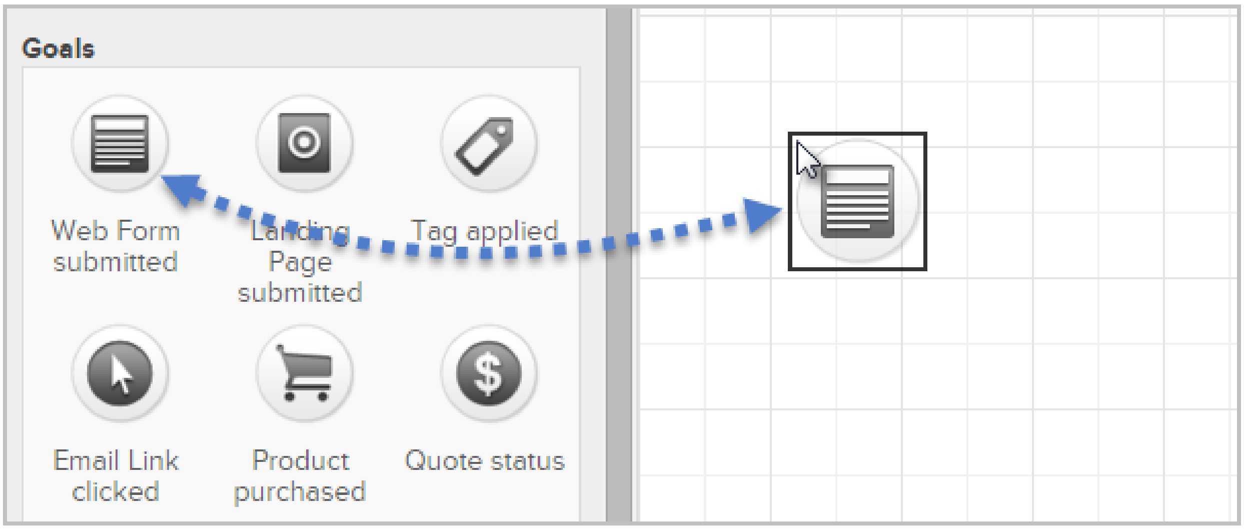
Create A Web Form

Last Modified on 09/04/2018 10:58 am MST

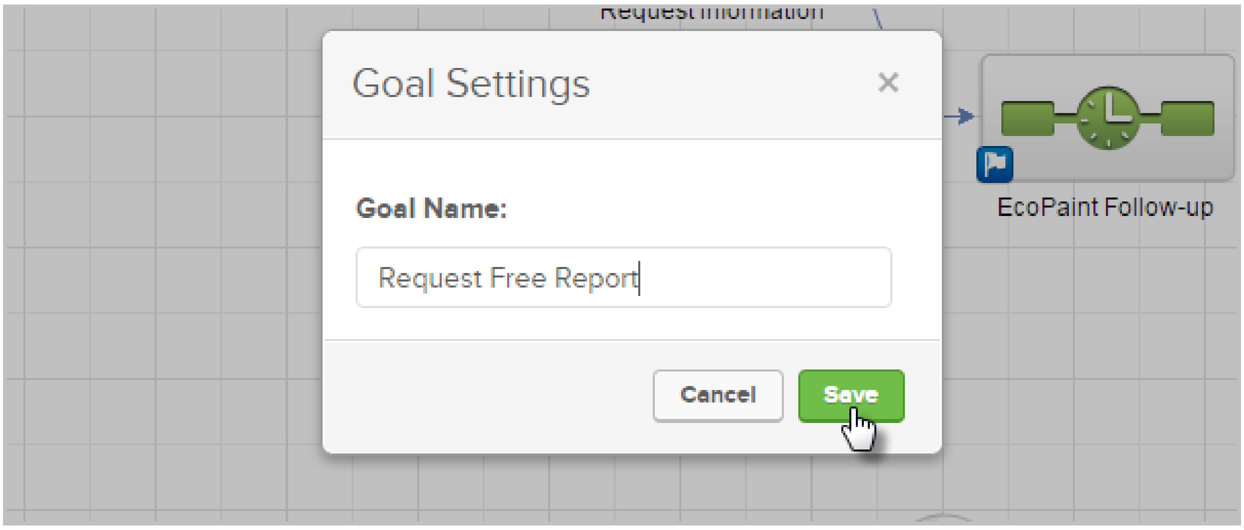
Pro Tip! You can use the **Other** snippet to create your own custom fields on the fly.



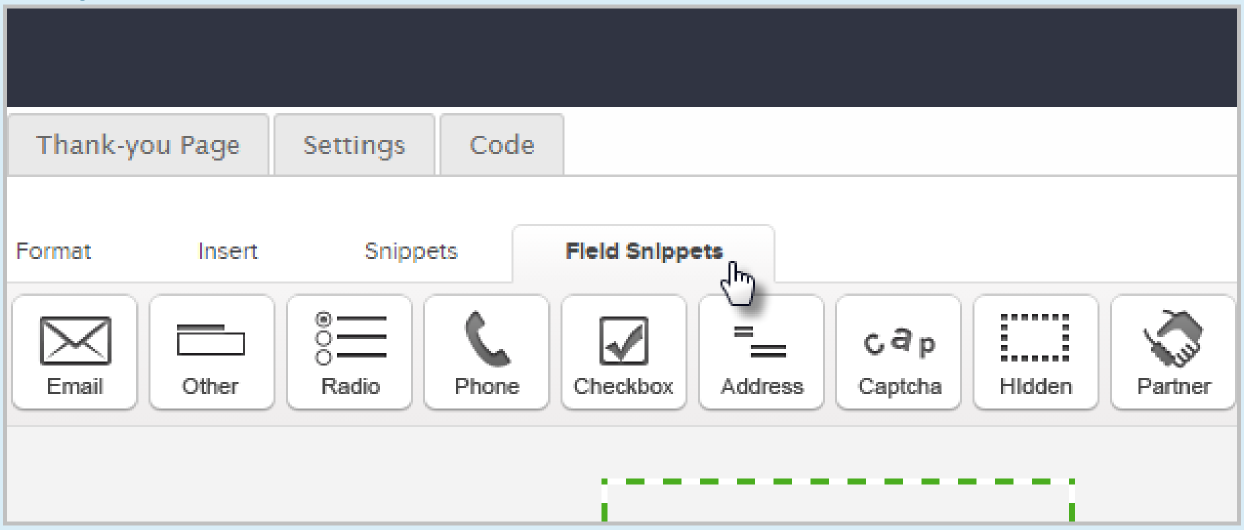
1. Click and drag a web form goal onto the campaign canvas.



2. Name the goal and click **Save. Now, double-click the goal to configure the web form.**

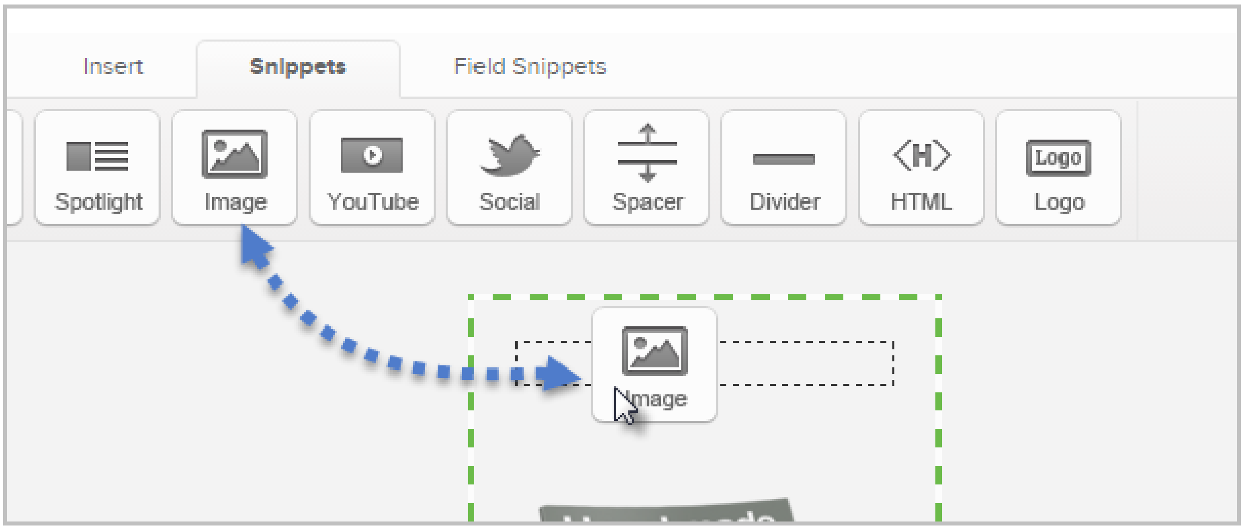


3. To access all of the available fields for a form, click the **Field Snippets** tab. From here, you can add, remove and edit the fields on this form.



Pro Tip! You can use the **Other** snippet to create your own custom fields on the fly.

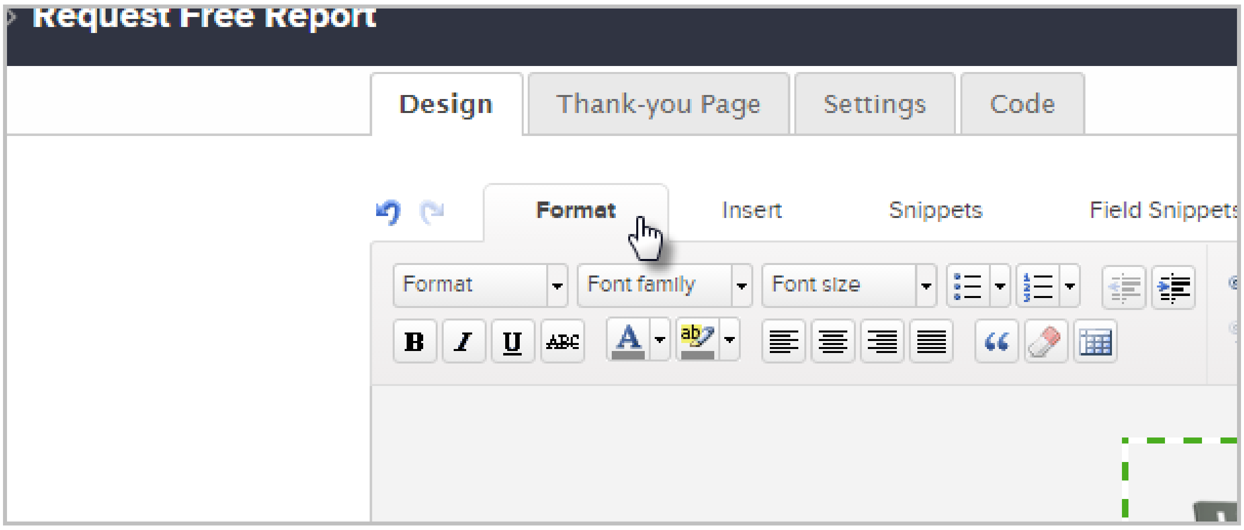
4. Move to the Snippets tab and click and drag a snippet onto the web form - An image snippet for example



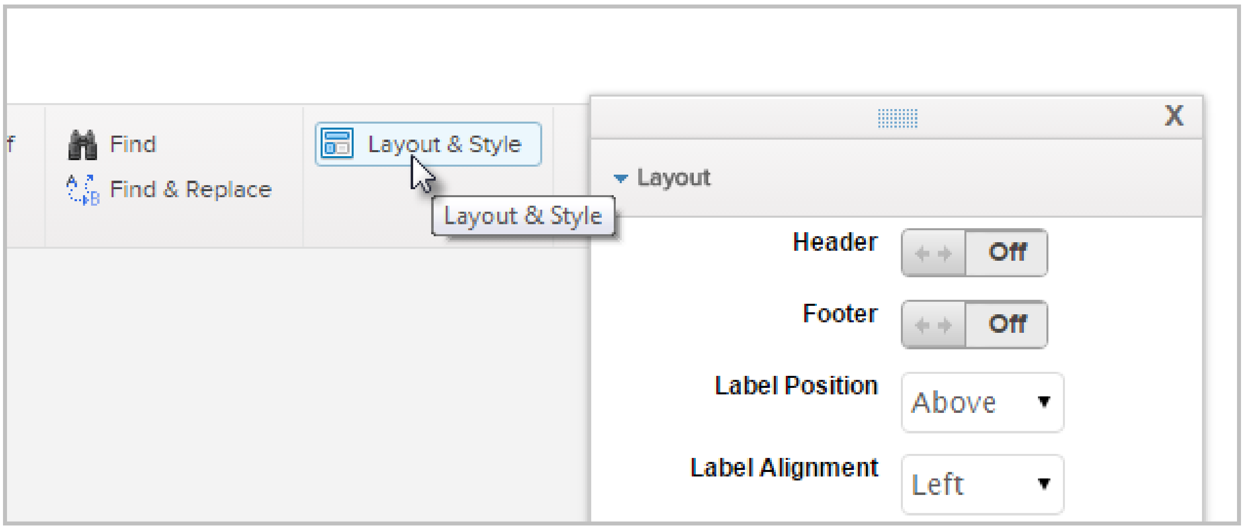
5. Configure your field snippet and click **Save**.

6. To delete a field or a snippet, hover over the item and click the **Delete** icon.

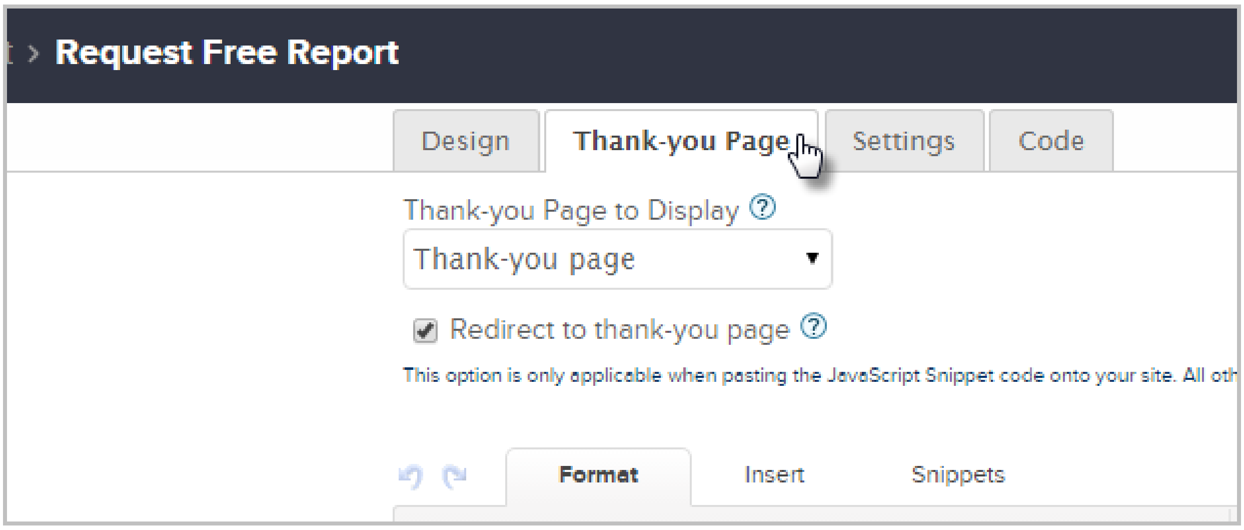
7. Click on the **Format** tab to access all of the text formatting tools.



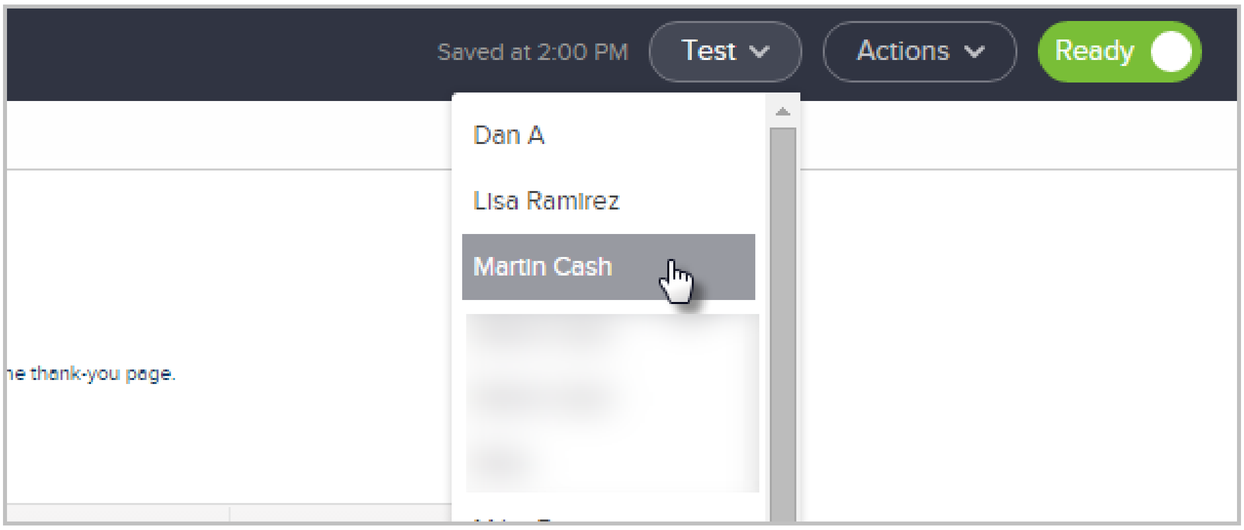
8. Click on the **Layout & Style** button to configure the look of your web form.



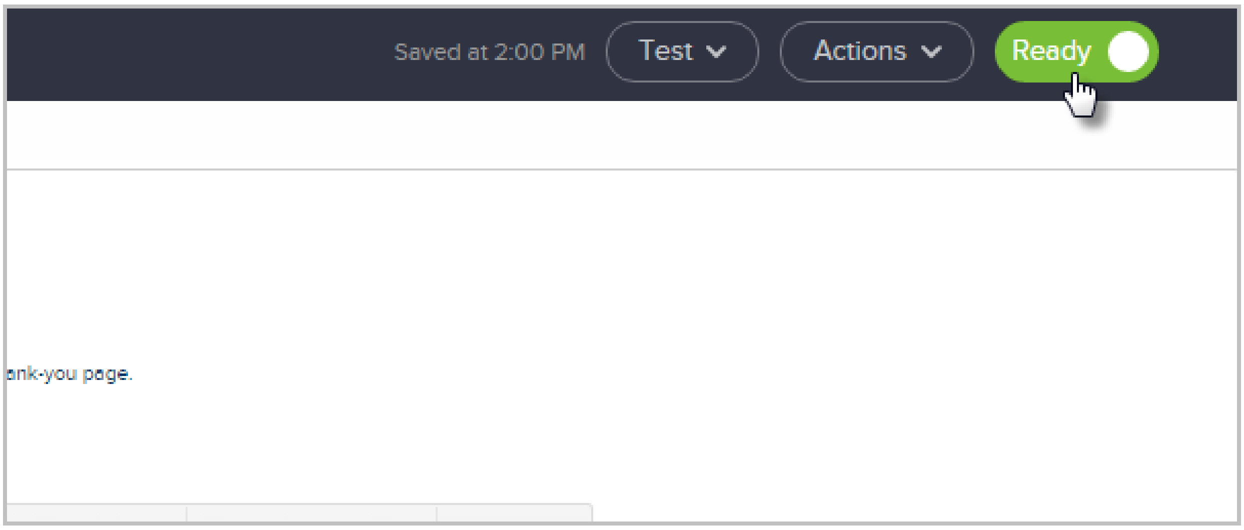
9. When you are finished designing your web form, click the **Thank-You page** tab and configure your Thank-You page.



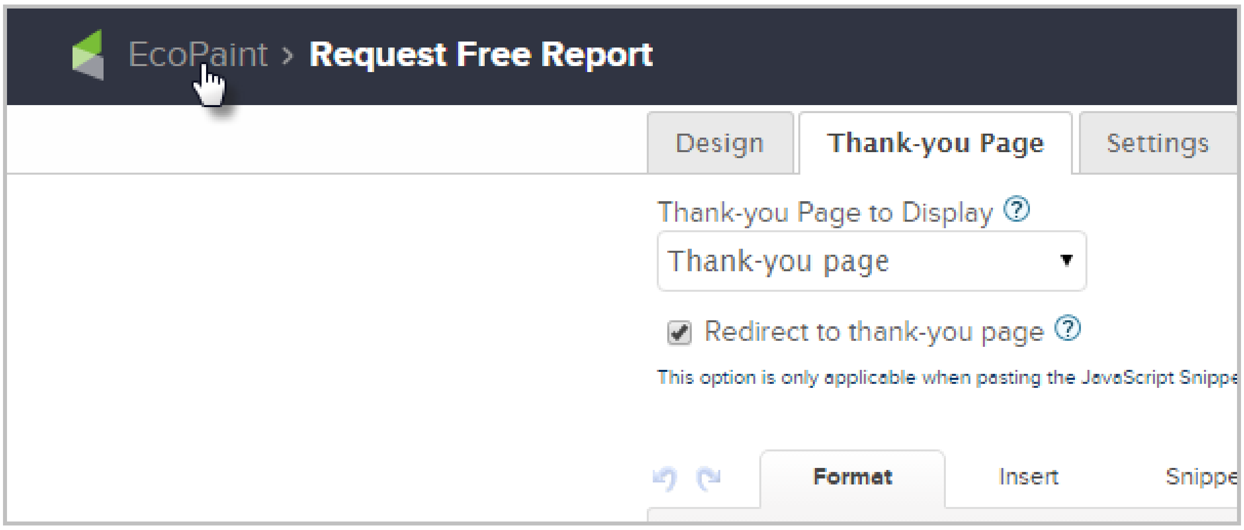
10. To test your form, just click the **Test** button and select a person.

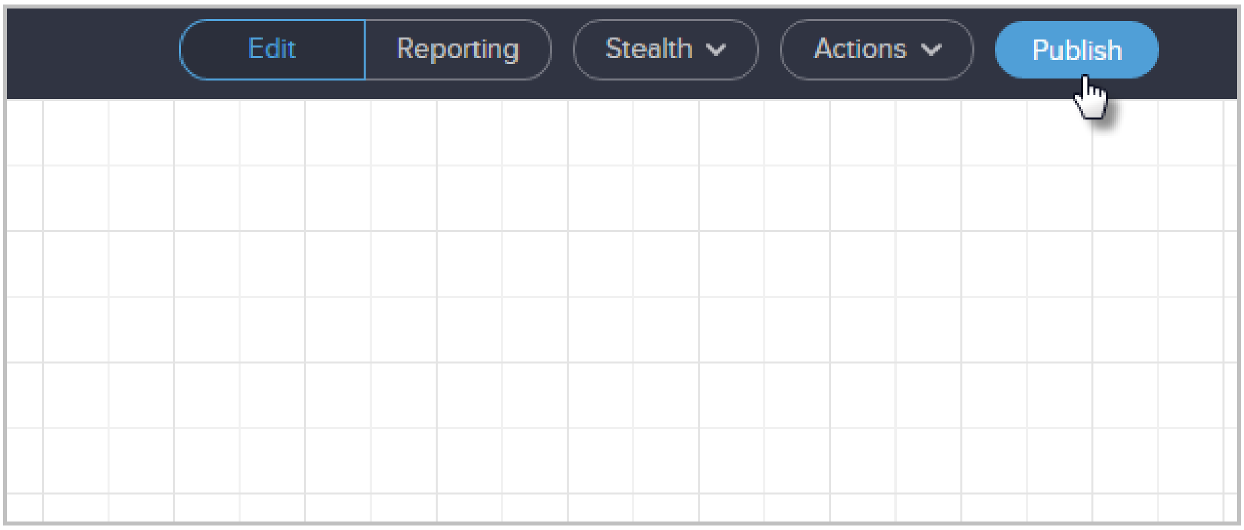


11. Once you've tested your form and are happy with it, change it from **Draft** to **Ready**.



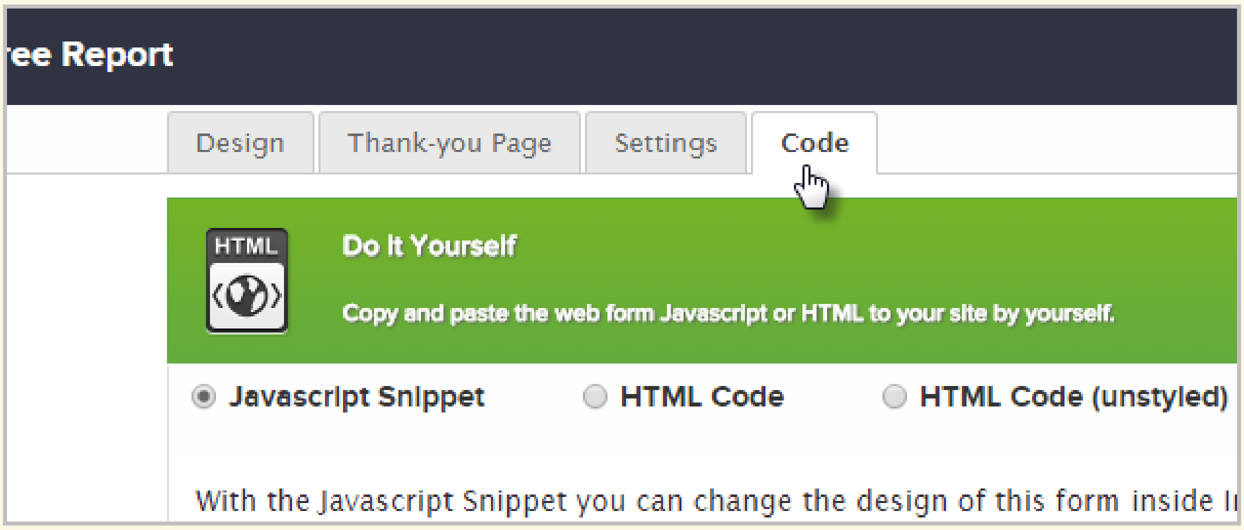
12. Click to go back to the campaign and Publish your changes.





13. To grab the URL of the web form, or grab the code to place on your site, go back into the web form goal and click on the **Code** tab.

Important! Every time a web form is changed, the *javascript* and *hosted* version will automatically update. If the *HTML* or *HTML unstyled* code is used, then the web form code must be manually updated on your website in order for the changes to take effect.



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Make Better Web Forms

Last Modified on 07/23/2018 1:30 pm MST

Guest Author:

	Edward Bell Client Success Manager & On-boarding Coach Launch Business Automation

Web forms are often overlooked or oversimplified because they're 'necessary'. But getting them right can mean the difference between floods of new leads vs a trickle, or high-quality data vs muck.

Web form Use Cases:

- Contact Us
- Lead Magnet
- Consultation Request
- Customer Questionnaire
- Quick Quotes
- Surveys
- Abandon Cart or 2-step web forms

High-Level Overview:

- Best practices for web forms
- What to include for each type of web form

These are crucial to the lifeblood of your business and turning your database into a goldmine: the more data you have, the richer your database. Have a read to see how you can get more juice from your web forms below:

1. Have ONE purpose for your web form. Let this purpose guide your field choices
   For example:
   - Is this for brand new prospects, existing clients, or both?
   - Is this for an expression of interest, lead magnet optin, contact us or something

else?
- Do I want high volume opt-ins or more quality responses?

2. Choose if you want high volume opt-ins or more quality data.
   - Use less fields to potentially get more submissions (make it easier to complete and submit).
   - Use more fields for potentially more extensive data capture (gets higher commitment and trust from them upon submit and completion.)

3. Use clear field labels to guide your prospect or client through the form. This helps reduce 'web form friction' (makes it easier for them to complete and submit the web form)
   - Ask questions. E.g. 'How can we help?' instead of 'Comments:'
   - Include instructions. E.g. ctrl + click to select multiple options
   - Give examples. E.g. Date fields could be followed by 'e.g. 11/9/1987'
   - Ask yourself: if I'd never seen this before... would I know exactly what to put in this field? If 'no', take it one level clearer.

4. Divide your form into clear sections with headings
   For Example:
   - Your Contact Details
   - Your Project Details
   - Key Company Info
   - Past Experience
   - Your Contact Preferences
   - Where Would You Like Us To Send It?

5. Auto-populate wherever possible. This is a great way to get an 'easy opt-in' because it fills out the web form with all the details they have already given you, which means they can simply click to submit straight away.
   1. Double click to edit your web form
   2. Once in, click the **Settings** tab
   3. Make sure the box is ticked to say *Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email*

6. **Important Note!** This will only work as long as the data already exists inside Infusionsoft. E.g. they have already given you their email address, first name, etc. AND if they arrive at the web form from an Infusionsoft-delivered email (not by clicking around on your website.)

7. Create a personal “I remember you” touch by hiding the email field when your prospect is clicking through from an Infusionsoft-delivered email. This means when they click through from the email, you don’t need to waste any of their time confirming or gathering contact details again. This allows you to get creative, ask juicier questions and gather priceless data.
    1. Click on the **Field Snippets** tab.

    2. Drag in a **Hidden Field** to the top of your web form

    3. In the popup that appears, select **Email** from the dropdown

    4. Leave the text field underneath blank (this will allow the field to automatically grab your prospect’s email address

8. **Important!** This will not work for cold traffic to your web form – they must click through from an Infusionsoft- delivered email e.g. broadcast or campaign builder email. You must ensure that the **auto-populate** box is ticked in the ‘settings’ tab in your web form for this to work. See Step 5 for instructions.)

9. Use radio buttons to segment your list so you can send relevant follow up emails to them
    1. Drop in a radio button snippet on your web form
    2. Edit the radio button label and options to suit your purpose (e.g. What kind of pet do you have? Options: Dog, Cat, Bird, Fish, Rabbit... etc)
    3. Apply tags depending on the option they choose by clicking the rectangular **Tag** button to the right of each option.
    4. Exit your web form builder and drop one sequence for each radio button option onto the canvas (with a little breathing room just to the right of your web form goal)
    5. Rename your sequences so they marry up with your web form options.
    6. Hover over your web form goal and drag the green arrow appears onto one of the sequences, then repeat for each sequence.
    7. Double click on the decision diamond that appears
    8. Click on the **+Rule** button for each sequence
    9. Click on the **choose** link and select **form submissions**
    10. Then choose the radio button option that matches the sequence title, then choose **is selected**
    11. Repeat for all sequences
    12. Exit the decision diamond and craft emails in each sequence relevant to the

option they have chosen on the form

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Create A Tag Goal

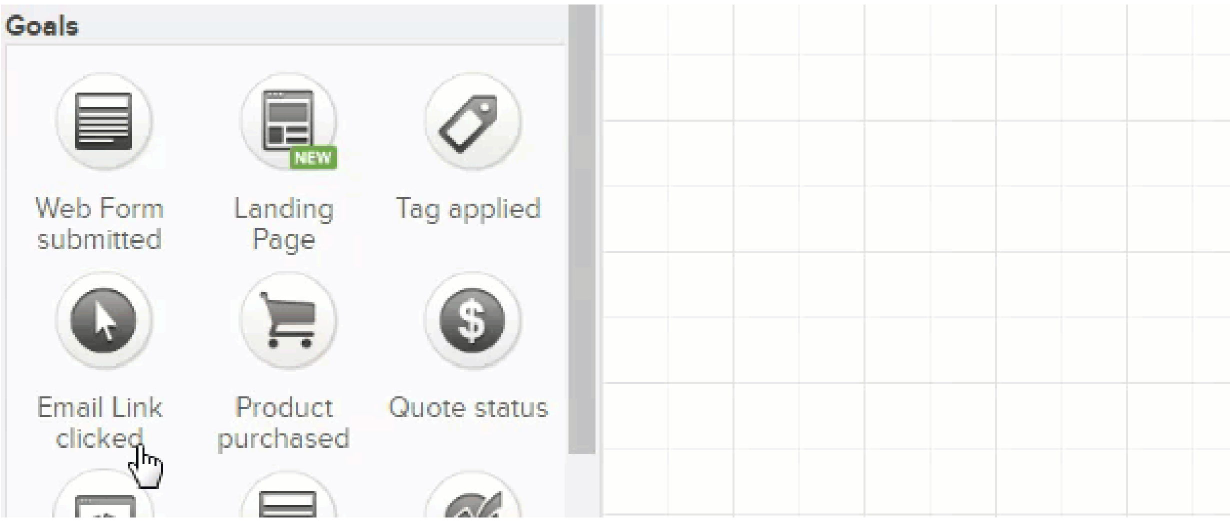
Last Modified on 07/23/2018 1:31 pm MST

Tags are searchable labels that are used to segment contacts. They can be updated automatically as part of a campaign sequence or be manually updated by an Infusionsoft user. Tags can be applied to individual contact records or through a batch action on a list of contacts.

Be Careful! The goals based on tag updates are considered satisfied whenever a tag is applied: by a user, by the system, or by the API. The related sequence(s) will begin even if the contact was not in in any previous part of the campaign. Make sure your users can easily identify the tags you use as goal methods by assigning them to a unique tag category and be sure to train them so they know what happens when the tag is used. The tag is applied goal is not retroactive; previous contacts with the tag will not satisfy the goal.

When a tag is used to satisfy a goal, the related sequence begins as soon as the tag is applied and the sequence does not stop when the tag is removed due to user error.

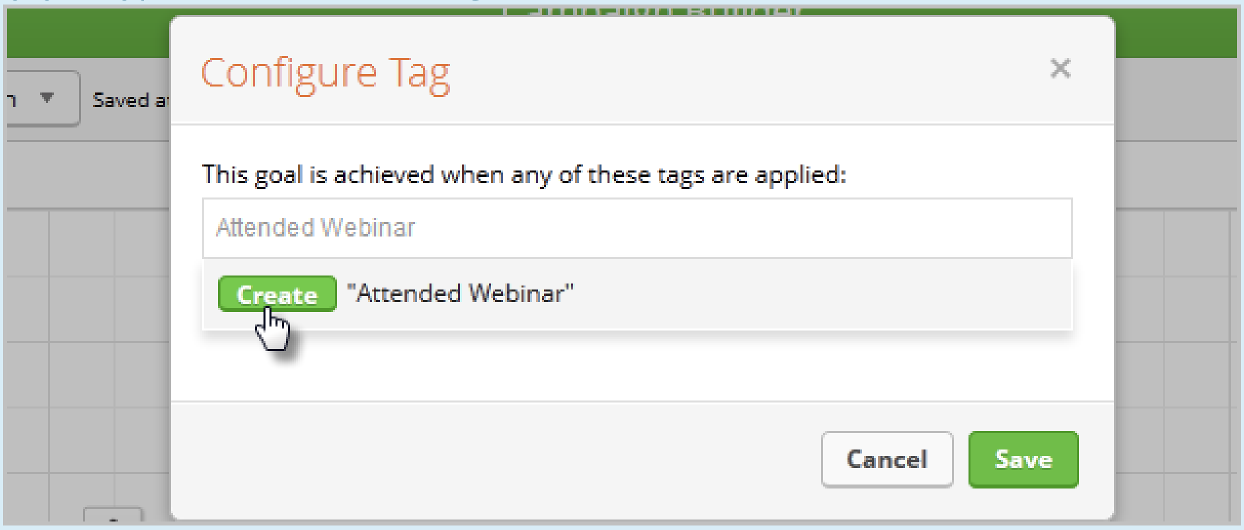
1. Click and Drag a goal onto the campaign canvas



2. Name your tag goal. Now double-click the goal to finish setting it up.

3. Search for an existing tag by name and click on the name select it.

   Pro Tip! If you assign more than one tag to this goal, the goal is considered satisfied when ANY ONE of the tags is applied to a contact. You can also create a tag on the fly; just type the name of the tag and click **Create**.



4. Click **Save**

5. Be sure to publish your changes

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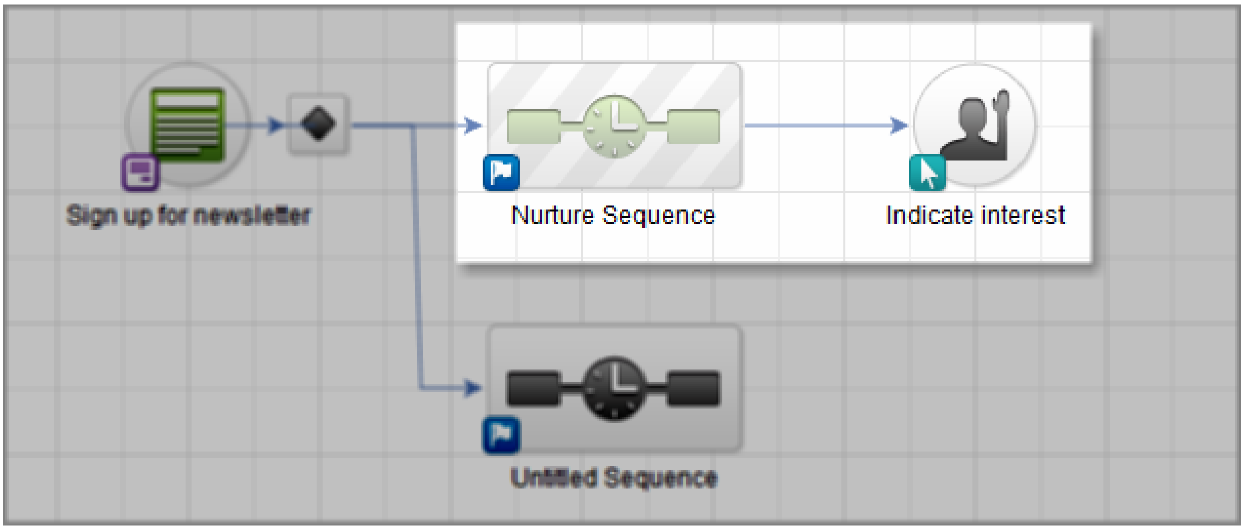
Create a Link Click Goal

Last Modified on 07/23/2018 1:32 pm MST

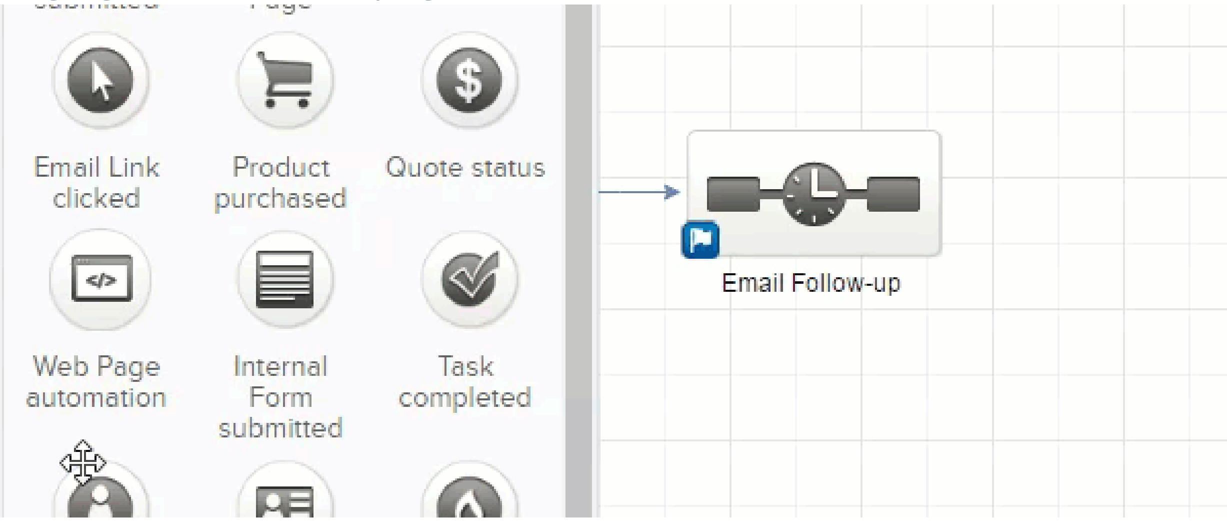
The links you add to campaign sequence emails can be selected as goal methods. They are used to engage the reader, gauge their interest level, and can be used to transition them from one campaign sequence to another. All of the email links track activity automatically. The ones you select as goal methods should be associated with specific calls to action so that it is no surprise to the contact when they move to the next stage of your marketing process.

If sequence emails include links for more than one call to action, and each call to action transitions the contact to a different sequence, then you will create a campaign goal for each call to action. The contact will go into the next sequence based on their first response.

> **Important!** Before you configure a link goal, you must customize the sequence emails that are designed to achieve the goal and add links to them.

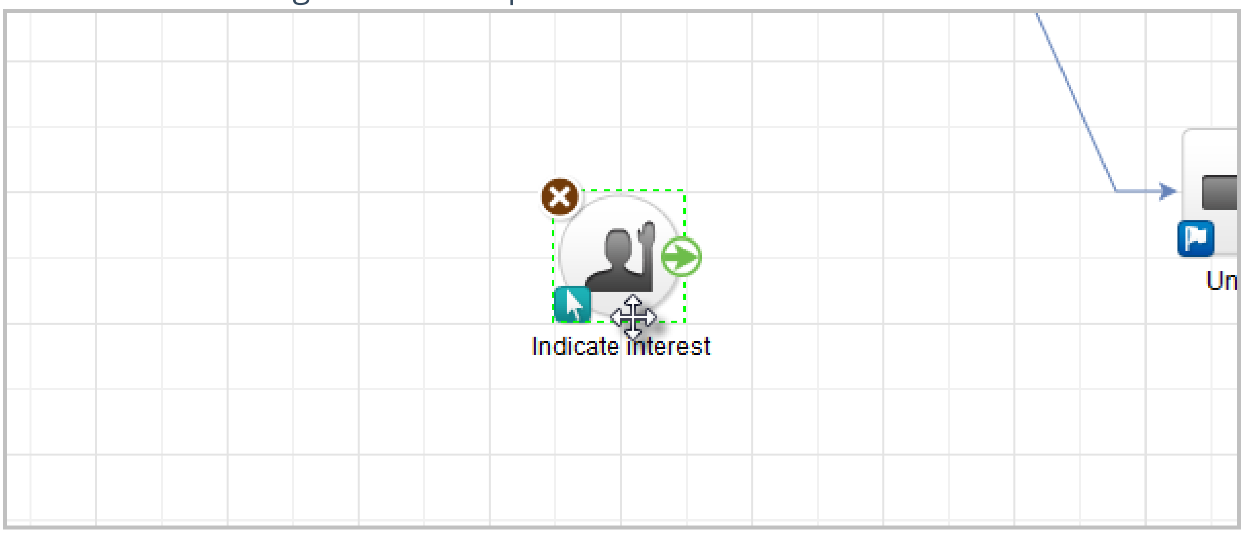


1. Drag a goal onto the campaign canvas



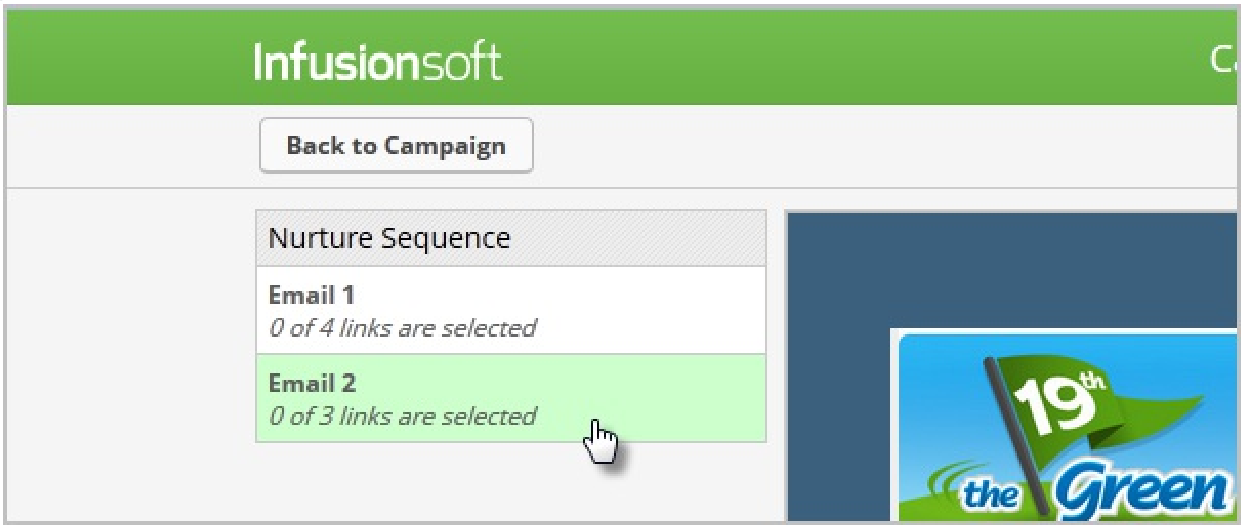
2. Name your Email Link Clicked goal.

3. Double click on the goal to set it up.



4. On the left, you will see a list of the individual emails in the sequences that connect to this goal. Click on the email title to view the message and select the links that satisfy the

goal.



5. Click on the email link(s) that satisfy the goal. You may have multiple links that satisfy the goal.

   Be Careful! A click on the links you select stops all campaign sequences that occur before and are connected to this goal. You will most likely have several links in each email, but not all of them will satisfy the goal.

6. When you are finished selecting links in the first email, proceed to the next one in the list and repeat this process.

7. Be sure to publish your updates.

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Create A Note Template Goal

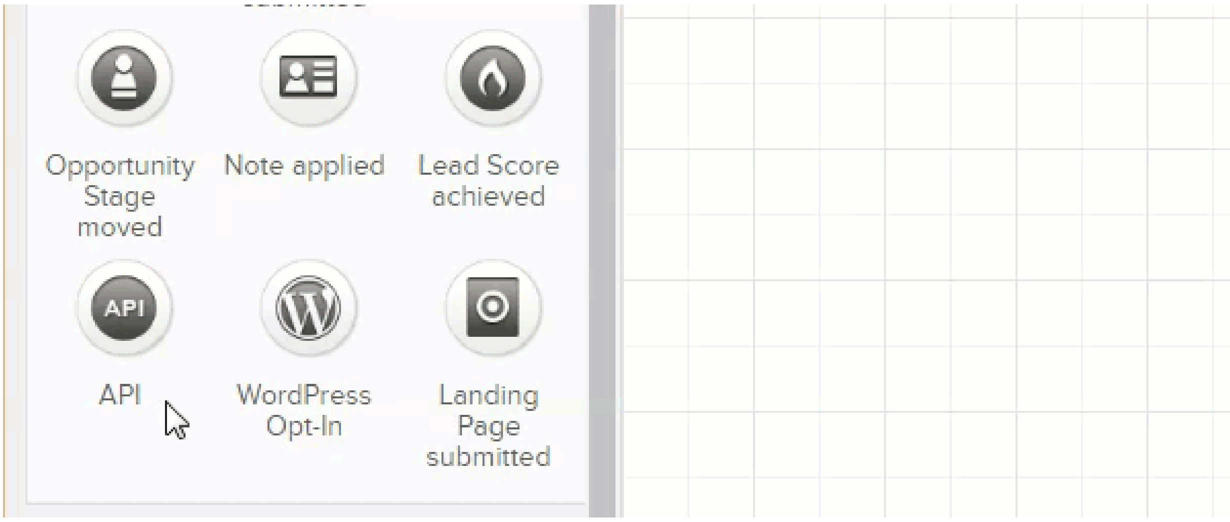
Last Modified on 07/23/2018 1:32 pm MST

Notes are manually added to a contact history to document a specific interaction. Notes include a date stamp as well as a description of the interaction that took place. A note might be added to a contact after an interaction such as a phone call, appointment or meeting. These interactions can satisfy a goal in a campaign sequence. If this personal interaction has more than one possible outcome, you will create multiple goals, each with a unique note assigned to it. If you do not process purchases online, then a note can also be used to satisfy a purchase goal. A note that satisfies a campaign goal is available to users after the goal is configured and the campaign update is published.

Be Careful! The goals based on note updates are considered satisfied whenever a note is added to a contact history. The related sequence(s) will begin even if the contact was not in any previous part of the campaign. Make sure your users can easily identify the notes you use as goal methods and be sure to train them so they know what happens when a note is used.

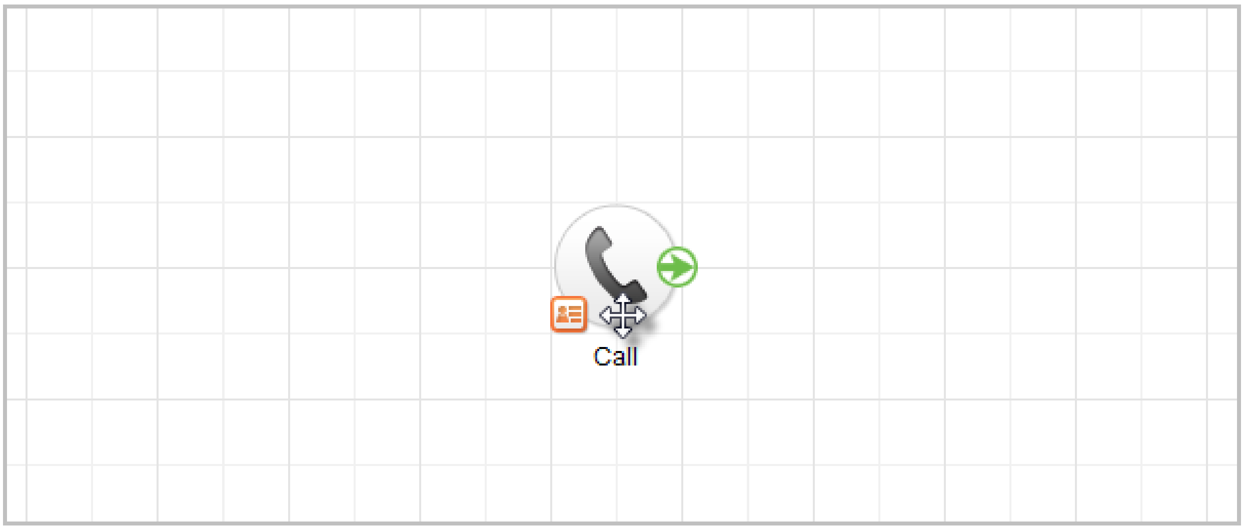
Each note can only be assigned to one campaign goal. You cannot re-use campaigns.

1. Drag a goal onto the campaign canvas.



2. Name your Note Applied goal.

3. Double-click on the goal to set it up.



4. Select an **Action Type** from the drop down menu. The user will search for and identify notes by their title. The title is assigned to the campaign goal.

5. Enter a description and creation notes. The description shows up as a link in the contact history. The creation notes can be viewed when a user clicks on the description link. Users can add custom notes before saving the note to the contact history.

6. (Optional) Select a user to attribute this note to. In most cases, you'll want the system to

attribute it to the logged in user who uses the note, which is the default.

7. (Optional) Set up email notifications. The user(s) you select will receive an email notification each time this note is used. Click on a user's name to select them.

8. Click Save to create the note assigned to this goal.

9. You are ready to publish your updates.

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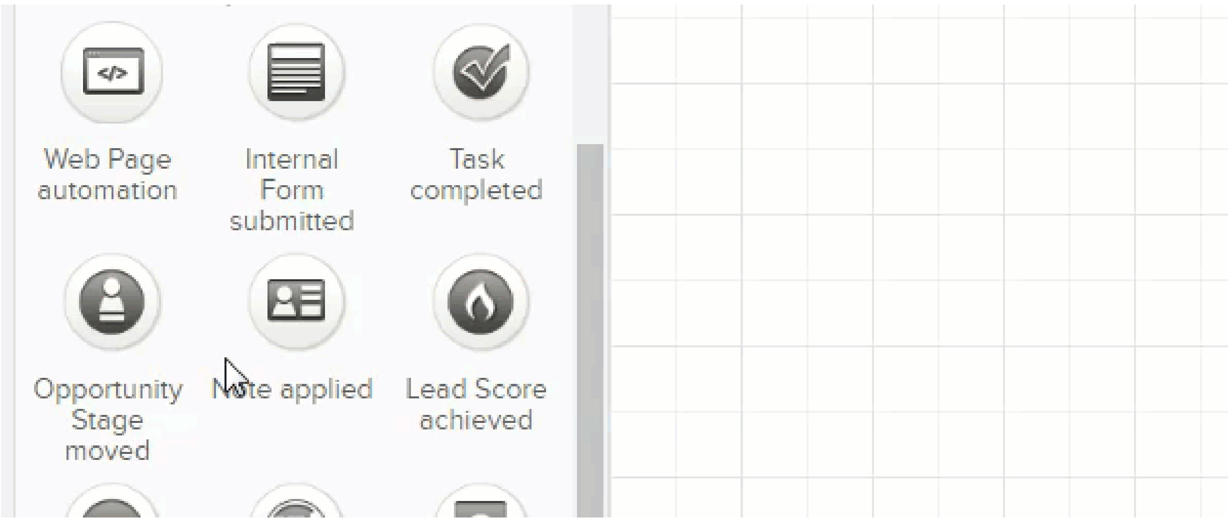
Create An Internal Form Goal

Last Modified on 07/23/2018 1:33 pm MST

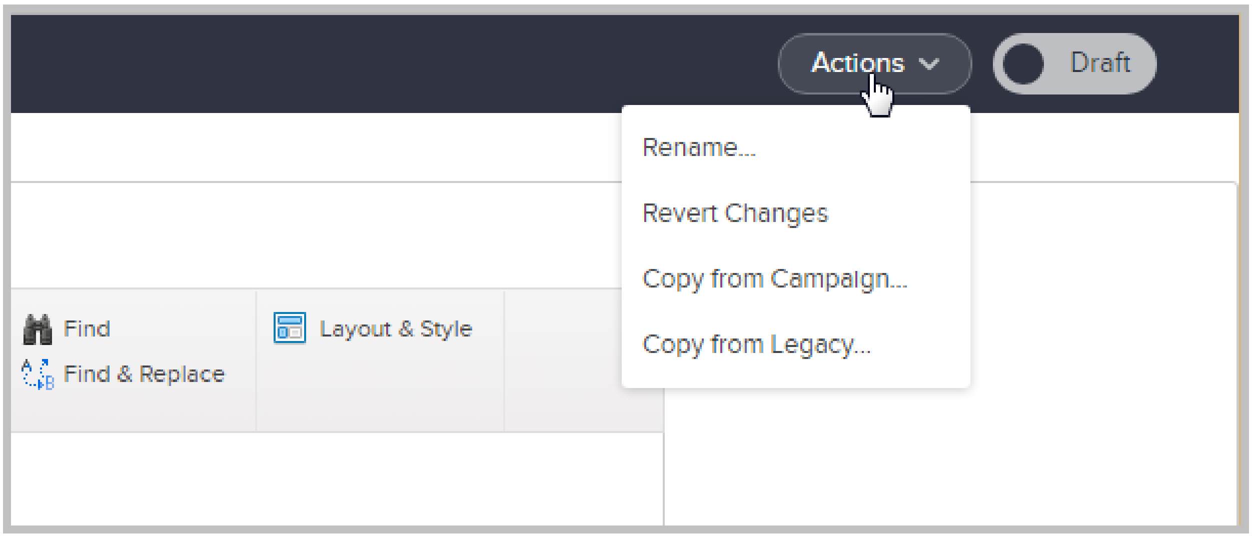
An internal form gives you the ability to submit a form on behalf of someone else. Users of your Infusionsoft application can quickly and effectively collect and update contact information using an internal form. Internal forms help automate internal workflows.

1. Drag a goal onto the Campaign Builder canvas and modify the goal setting so that it is satisfied when a user fills out an internal form.

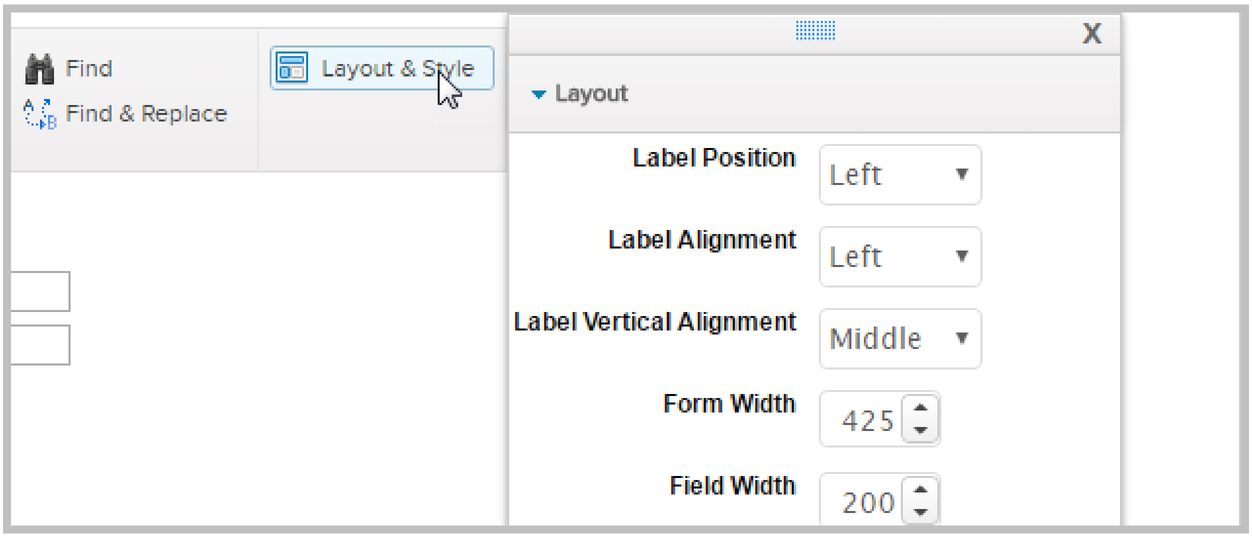


2. Double-click on the goal to set up the internal form.

3. (Optional) You can rename the internal form or copy from a previously created Legacy or Campaign Builder internal form. Note that only forms created by the Drag & Drop Builder are available to copy from.



4. Click on **Layout** in the toolbar to make any aesthetic adjustments to the form.



5. To add snippets and field snippets to your internal form, click and drag a snippet onto the form. Note that only snippets relevant to an internal form are available. It's a good idea to include a paragraph content snippet containing any necessary instructions or reminders to the user that is filling out the form.

6. When you finish customizing the internal form, toggle the status from Draft to**Ready**.

7. You are now ready to publish your changes.

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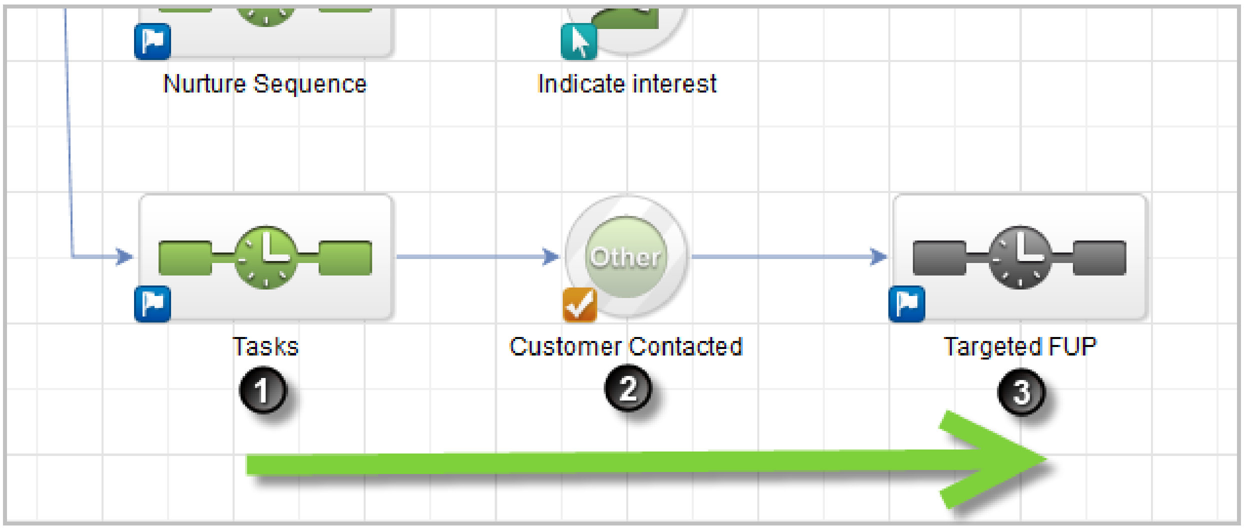
Create A Task Completion Goal

Last Modified on 07/23/2018 1:33 pm MST

Tasks that you add to a campaign sequence can be used to satisfy a task completion goal. Once all the required tasks are complete, the goal is satisfied and the campaign will continue. The task completion goal must be preceded by at least one campaign sequence containing tasks driving to the goal. There is no limit to the number of tasks in the sequence nor is there a limit to the number of sequences with tasks driving to the goal.

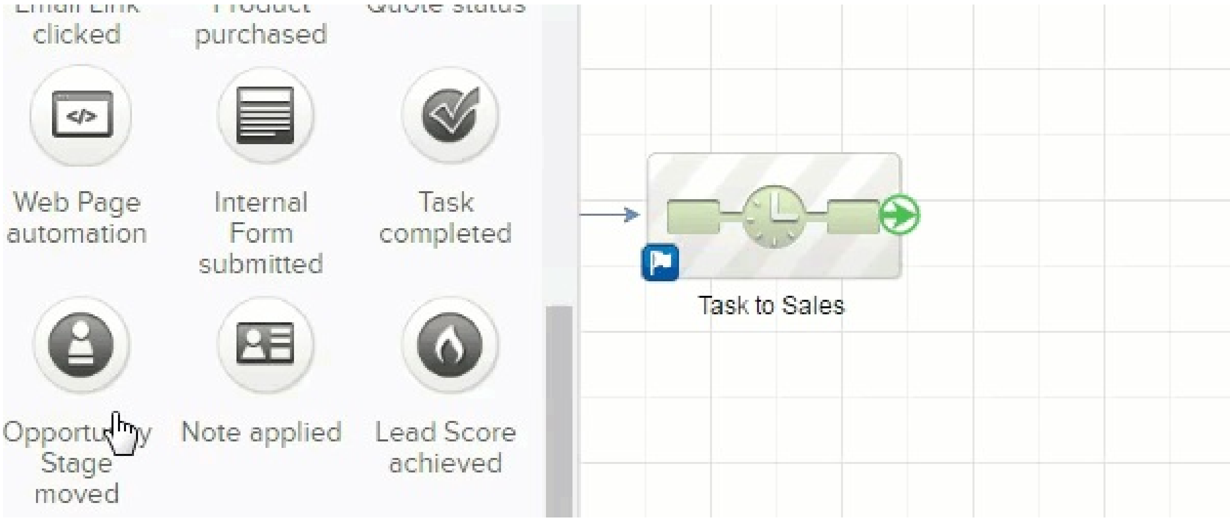
Important! Before you configure the task goal setting, you must add and customize the tasks in the sequence that are designed to achieve the goal.



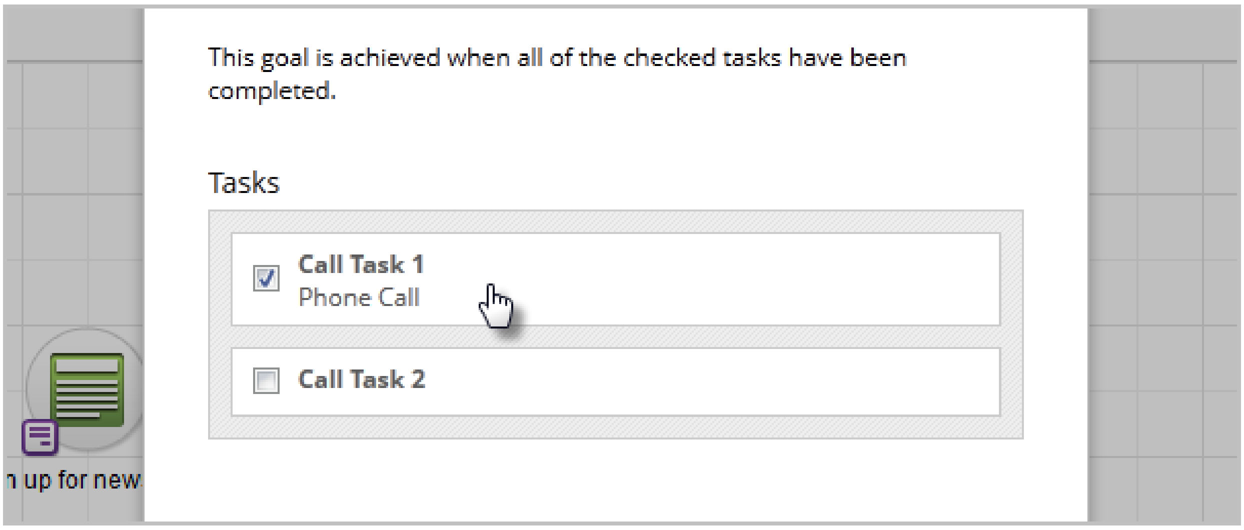
1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.

2. Add the task(s) to your sequence.

3. Drag a goal onto the campaign canvas and connect them to the sequence that contain the task(s)



4. Double-click the goal and select all of the tasks that are required to be completed. The tasks you select are the requirements for this goal to be accomplished.



5. Click **Save**

6. You are now ready to publish your changes.

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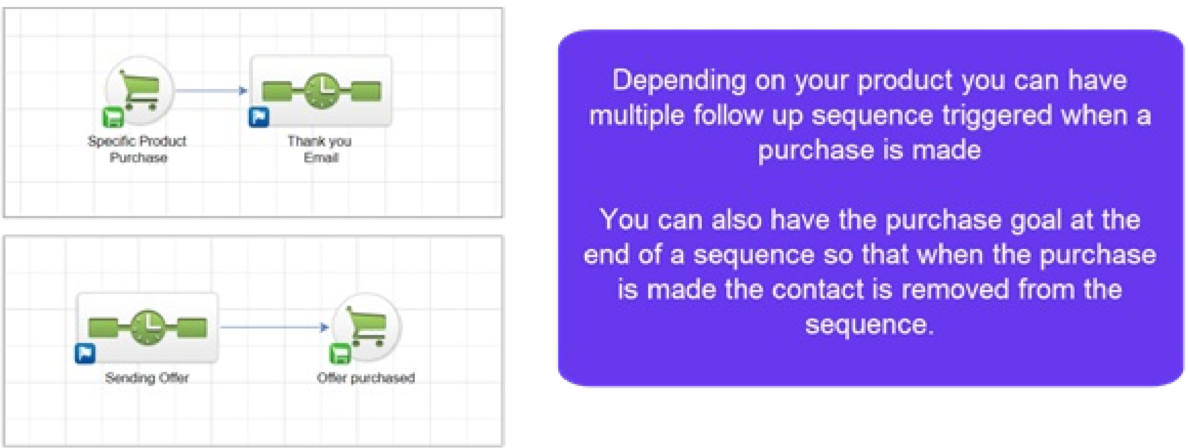
Create An Online Purchase Goal

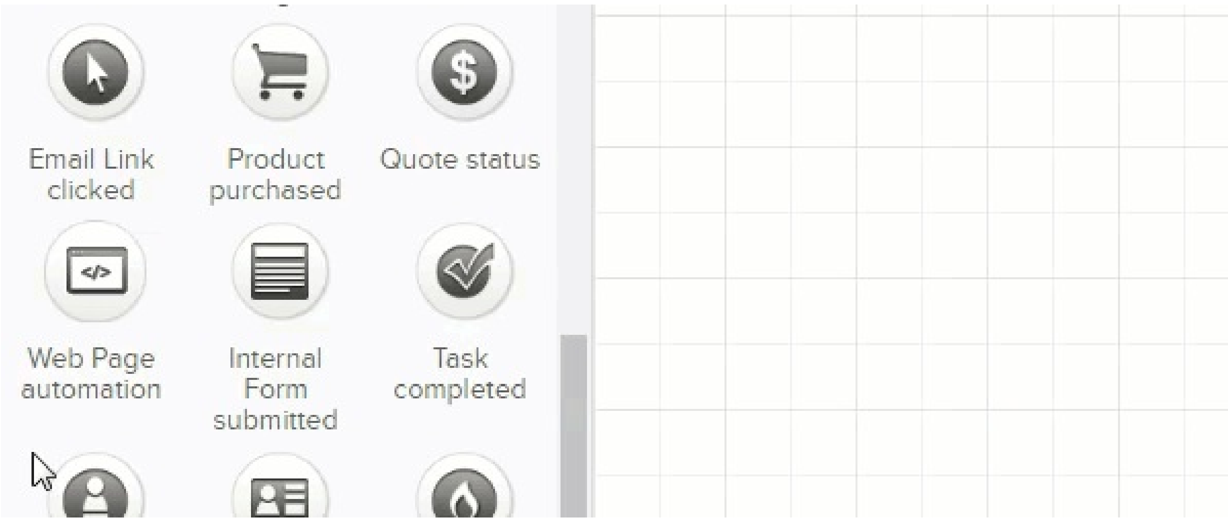
Last Modified on 07/23/2018 1:33 pm MST

Purchases are tracked when a prospect or customer buys through an Infusionsoft order form, the shopping cart or upon successful payment for orders created through the API .



Pro Tip! A purchase goal can be satisfied by a general purchase, the purchase of a specific product, or the purchase of a particular category of product. If you process manual orders, you will need to use an alternative goal method , like an opportunity stage move or a note.

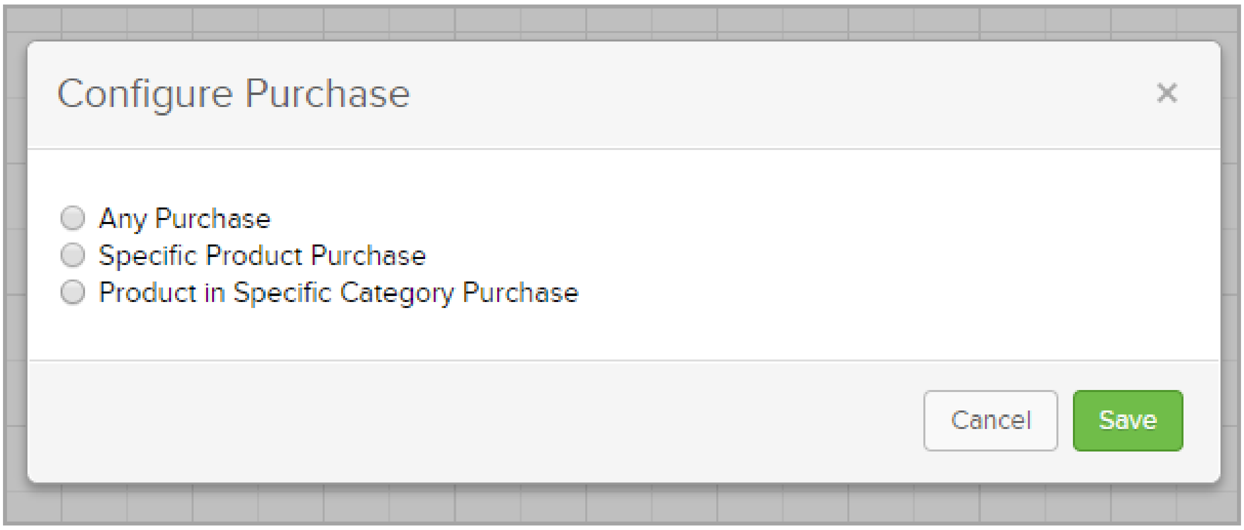
1. Click and drag a goal onto the campaign canvas.



2. Name the Product Purchased goal.

3. Double-click on the goal.

4. Select the purchase option that satisfies the goal.
    - **Any Purchase**: This option allows you to update a contact's campaign sequence when they make any kind of purchase. This is a good option for companies that send generic customer follow-up that is not related to a specific product or category of products.
    - **Specific Product Purchase**: This option allows you to send product-specific communications, which can be used to help the customer maximize the value they receive from the product and / or to upsell additional products to them.
    - **Product in a Specific Category Purchase**: This option allows you to send customer communications based on a specific category of interest (e.g. live event promotions to people who like to attend seminars.)



5. Click on the **Save** button to apply the purchase option that satisfies the goal.

6. Don't forget to publish your changes when you are ready to go live.

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Create An Opportunity Stage Move Goal

Last Modified on 07/23/2018 1:35 pm MST

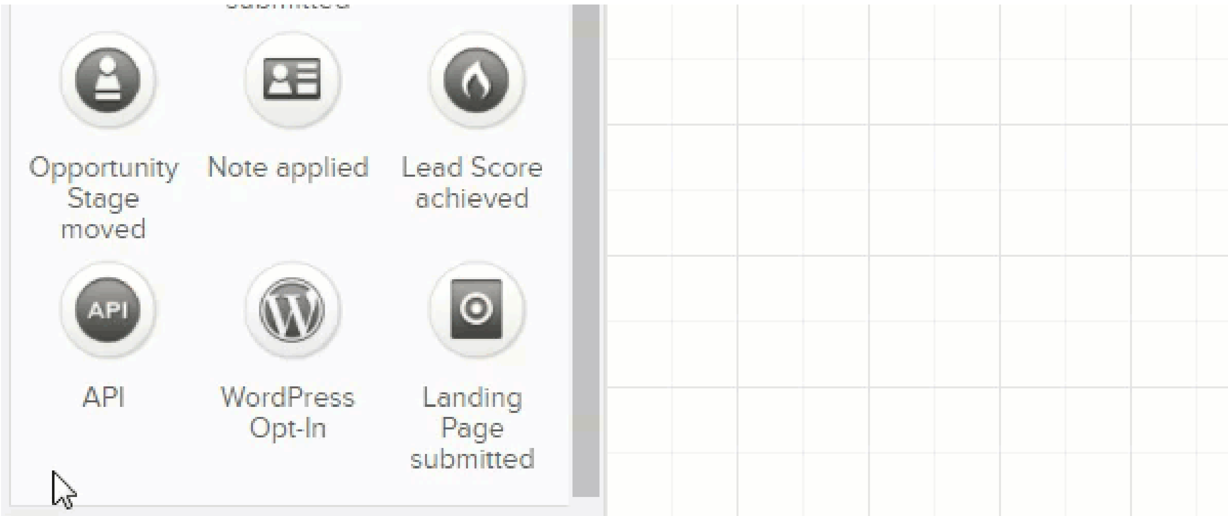
Opportunity stages represent milestones in a sales process and track prospect progression. Sales reps manually update opportunity sales stages based on their personal interaction with prospects. Some of these sales stages may satisfy a campaign goal and be used to begin a sequence. Stage movement is not always sequential in reality. However, when designing a campaign using stage movement to satisfy goals, set them up sequentially. When a goal is satisfied, all of the previous sequences in the campaign path stop, and only the sequence attached to the recently satisfied goal (a stage move) begins.

The campaign sequences are completely separate from any other sales automation. The campaign sequences attached to the goal run in conjunction with existing sales automation. They do not override the existing automation.

Be Careful! The goals based on opportunity stage movement are considered satisfied when a sales rep selects a new sales stage and saves the opportunity. The related sequence(s) will begin even if the contact was not in any previous part of the campaign.

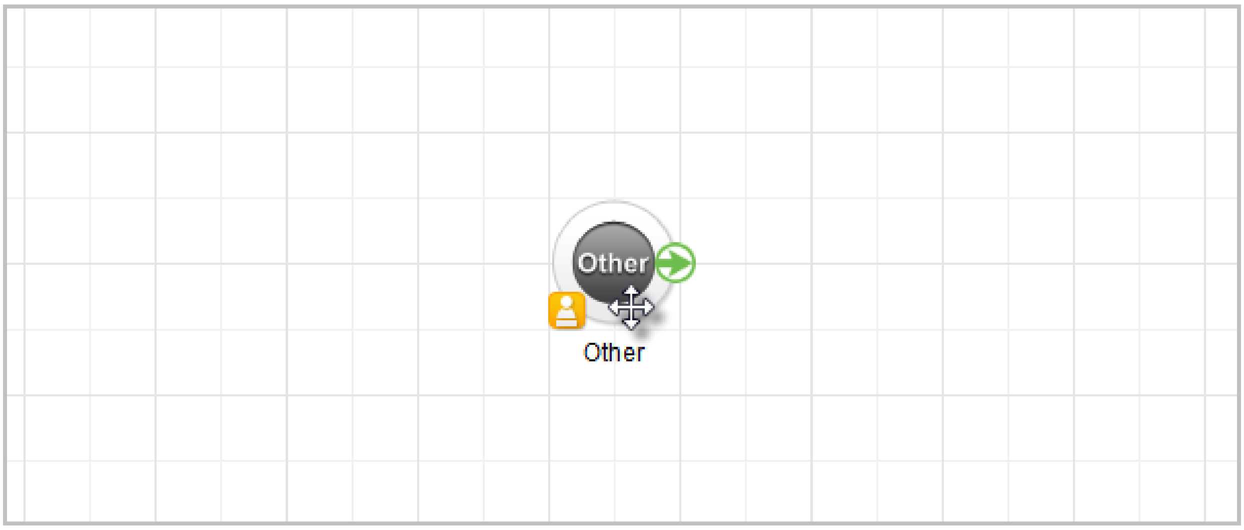
Make sure you train your sales reps so they know how sales stage movements coordinate with campaign goals and sequences.

1. Click and drag the goal icon onto the campaign canvas

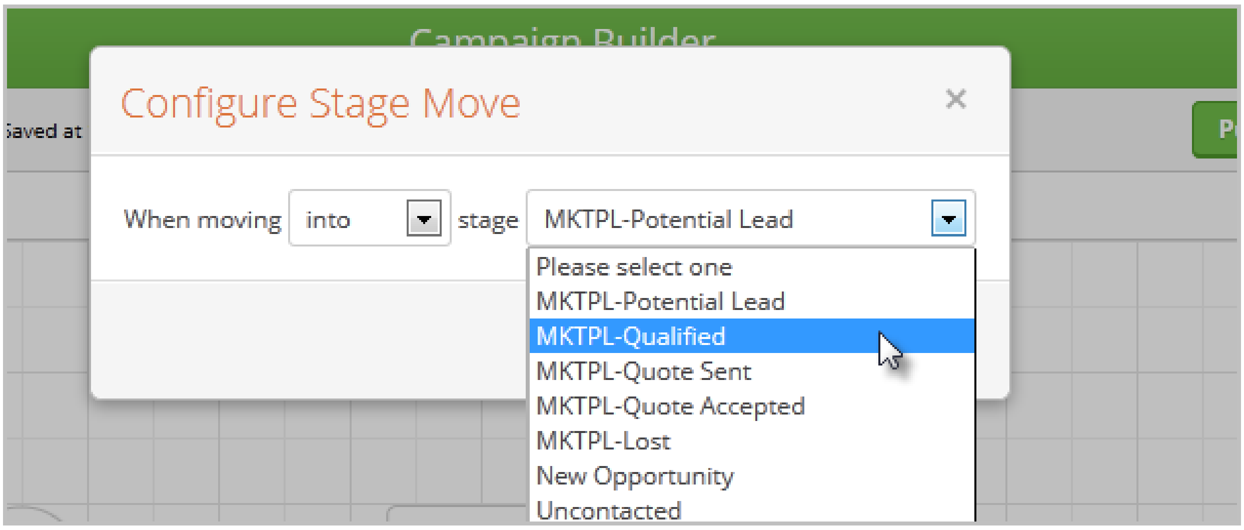


2. Name the Opportunity Stage Moved goal.

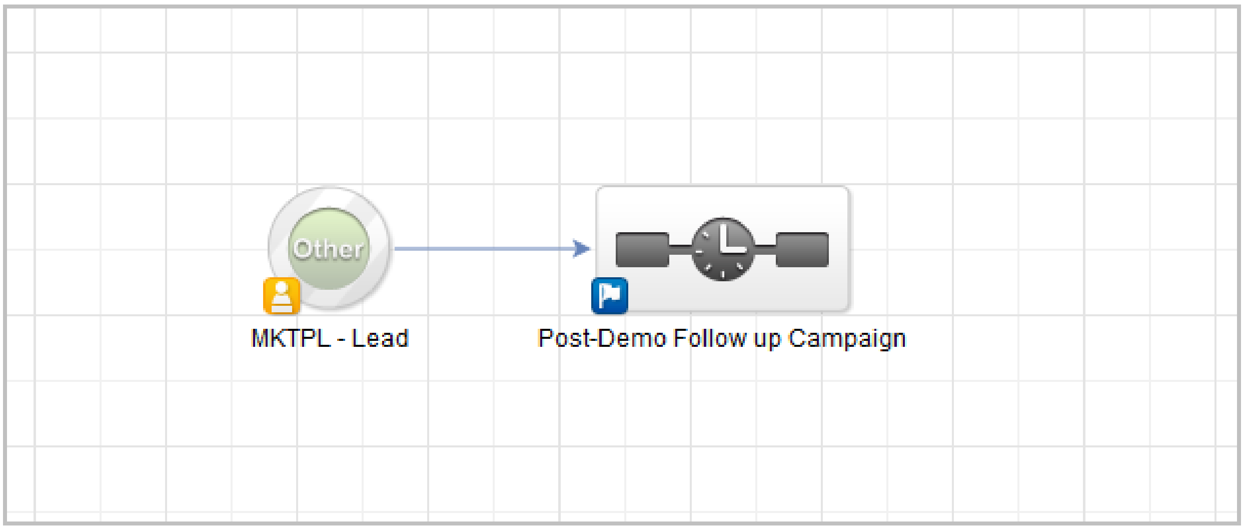
3. Double-click on the goal



4. Configure the stage
   - The goal can be based on movement INTO a particular stage, regardless of the prior stage.
   - It can also be based on moving OUT OF a particular stage, regardless of the new stage.



5. Click **Save** to apply the stage update to the goal.



6. You are ready to publish your updates.

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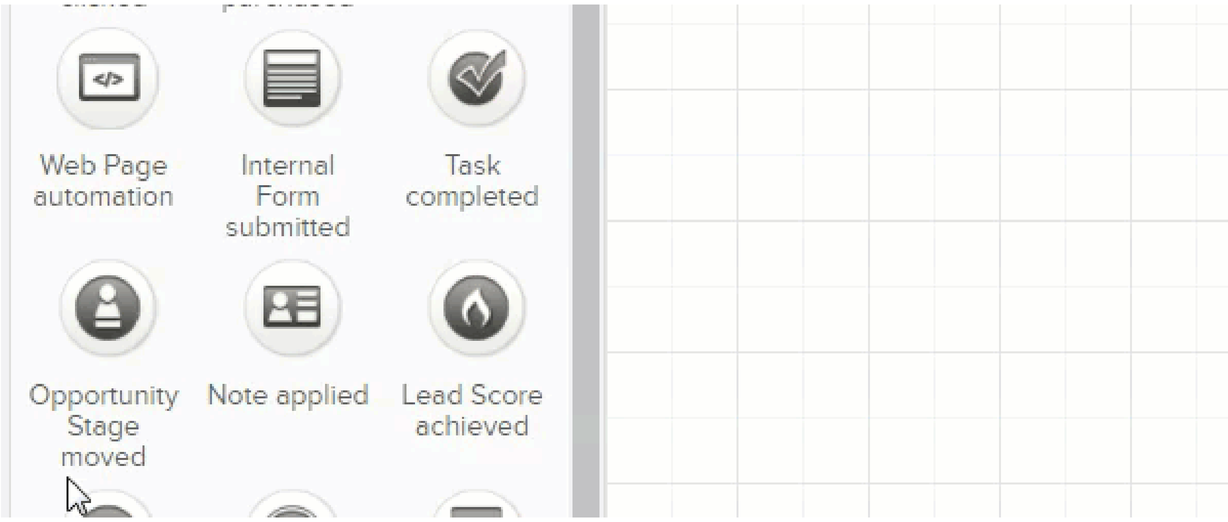
Create A Reaches A Score Goal

Last Modified on 07/23/2018 1:35 pm MST

You can configure your campaign to take action when a contact's lead score increases or decreases to a specific number. Once the score has been reached, the goal is satisfied and the campaign will continue.

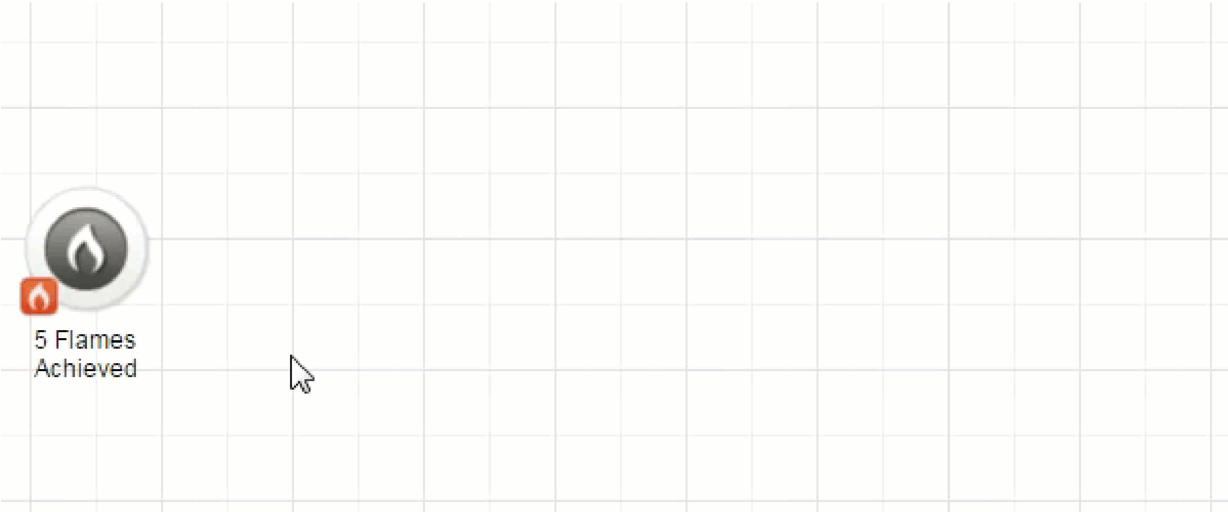
1. Drag the Lead Score Achieved goal to the canvas.



2. Name the Lead Score Achieved goal.

3. Click **Save**

4. Double-click the goal and configure the number of flames needed to accomplish this goal and send the prospect to the next part of the campaign.



5. Click **Save**

6. You are now ready to publish your changes.

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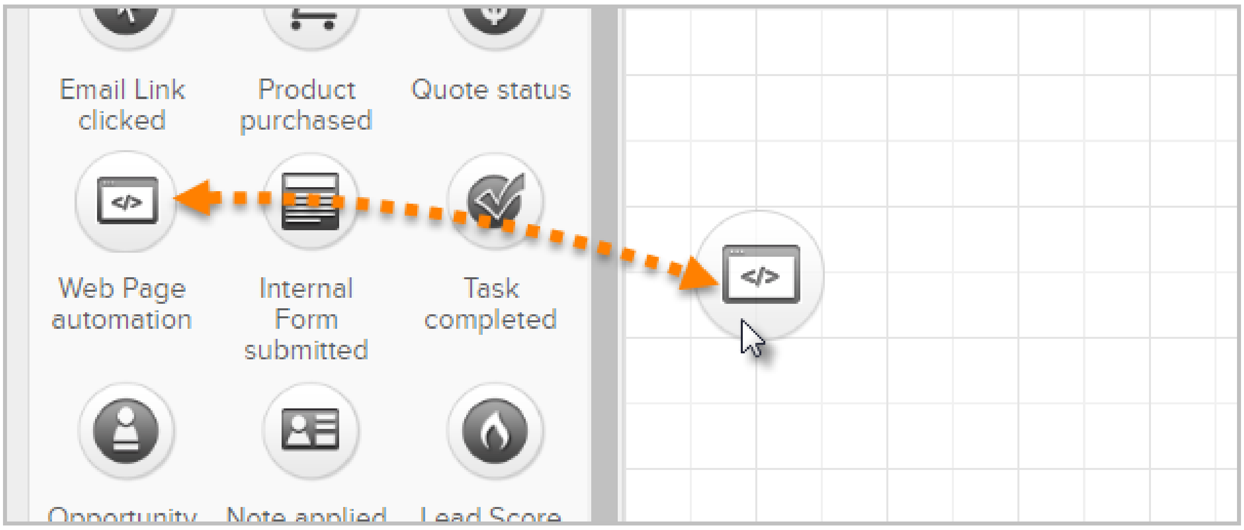
Create A Web Page Automation Goal

Last Modified on 07/23/2018 1:36 pm MST

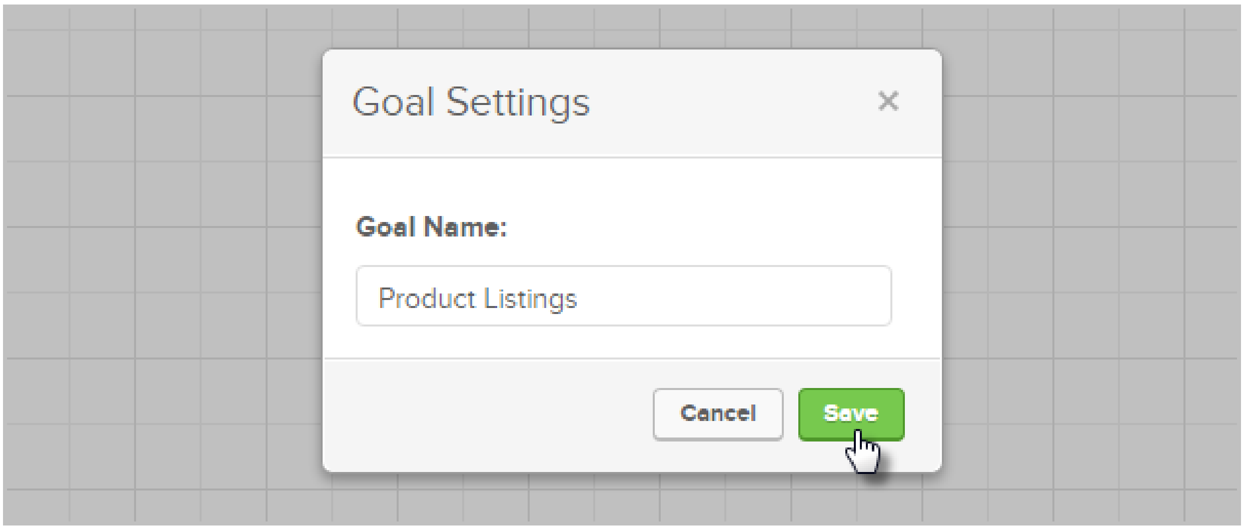
You can trigger campaign automation when an existing contact visits a specific page on your website. After a contact performs one of the following actions, a tracking cookie is placed in their browser:

- Clicks a link in an email
- Submits a hosted or JavaScript embedded web form
- Submits a landing page form
- Submits an order form
- Submits an order via the shopping cart
- When the contact visits a web page that contains the tracking code, you can initiate campaign builder automation.

1. Click and drag a **Web Page automation** goal onto the campaign canvas

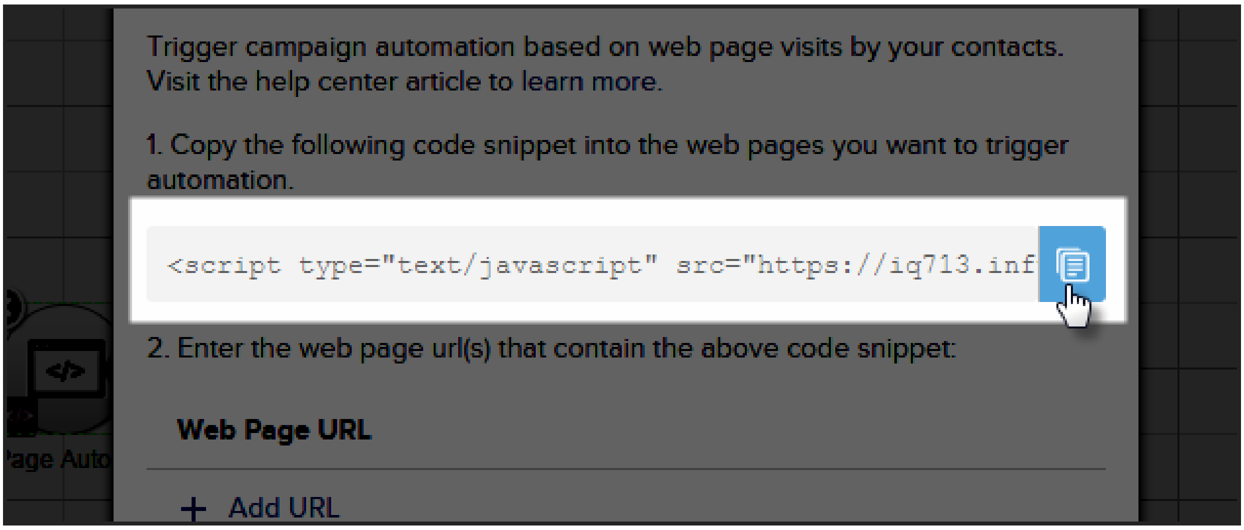


2. Name the Goal and click **Save**



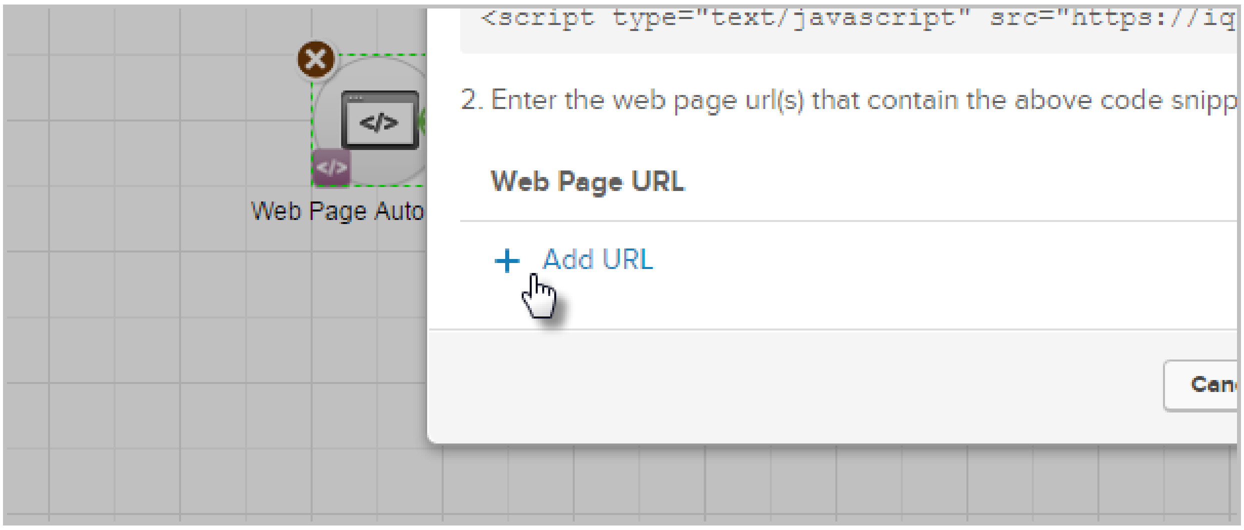
3. Double-click the goal to configure

4. Click the **copy** button to copy the script into your computer's clipboard



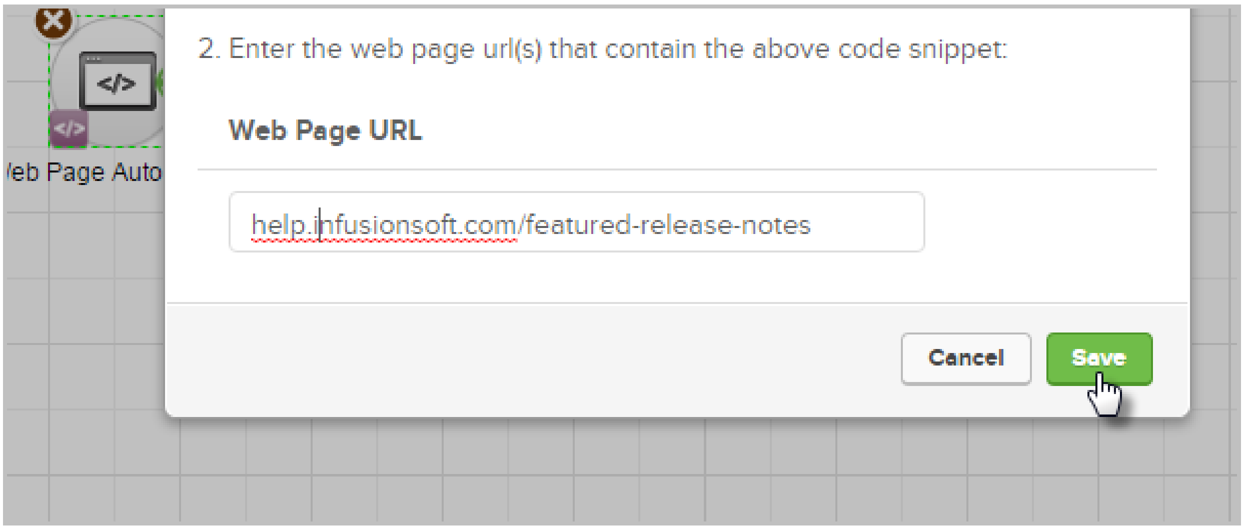
5. (Optional) If you're not ready to use the script now, simply paste it into Note Pad or Text Edit so that you can grab it later

6. Click **+ Add URL** and enter the URL of a page you would like to track on your website and hit **Enter**



7. Repeat step 6 until you have entered all of the URLs that you would like to track

8. When you're finished, click the **Save** button



9. Now insert the code snippet onto the pages that you want to track. It can be added using any HTML widget (Weebly and WordPress) or inserted anywhere on a custom page

   Pro-Tips! If you are already using the web tracking code on a page you want to track, you don't need to add this new snippet to the page. Two conditions must be met in order for the campaign automation to trigger:
   - The tracking code must be on the page that the contact visits.
   - The tracking cookie exists on the contacts browser.

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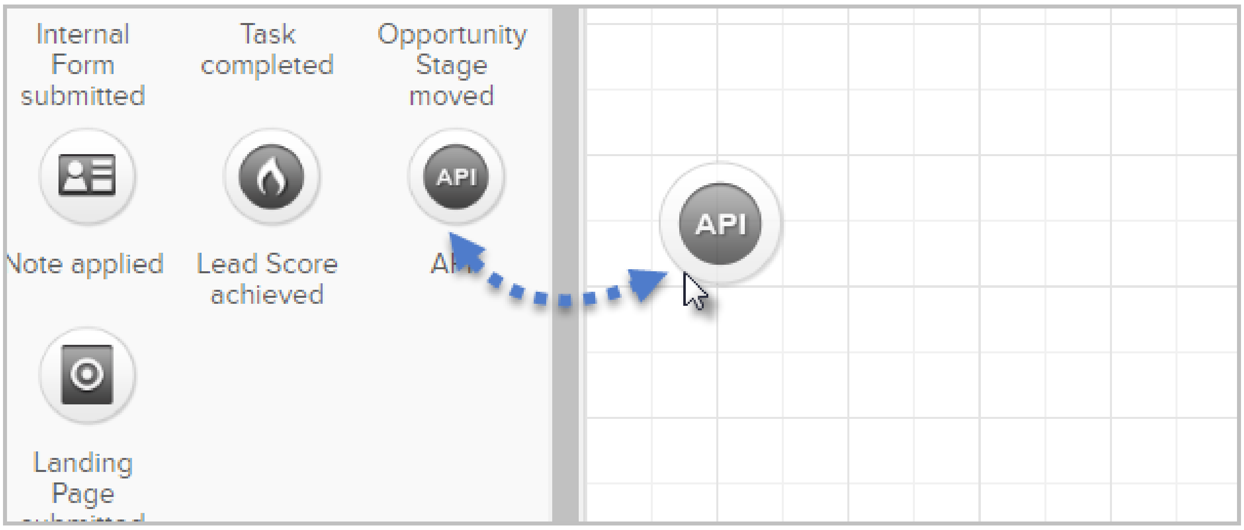
Create An API Goal

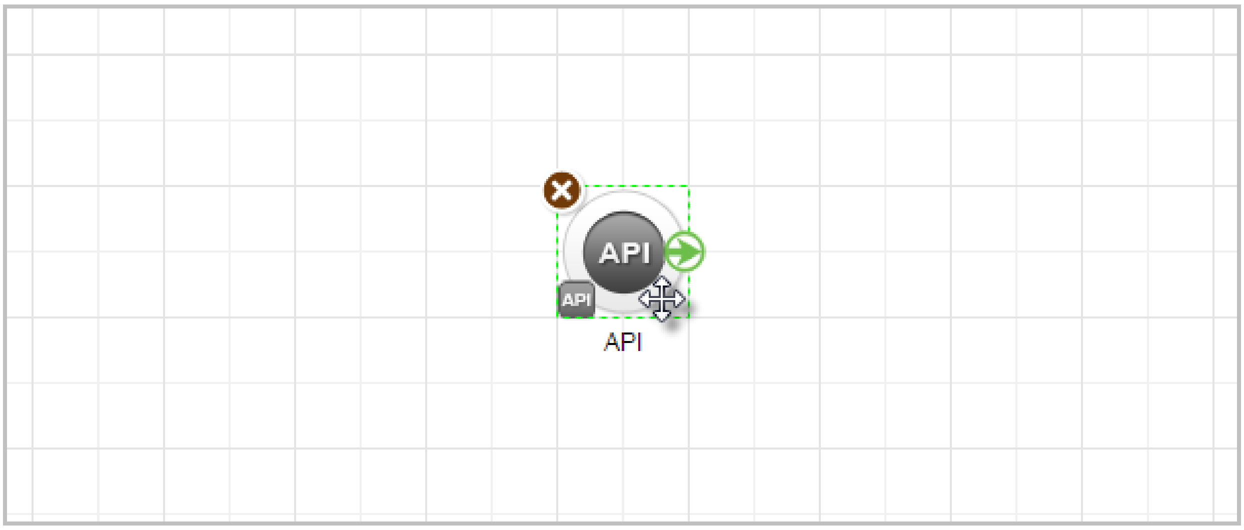
Last Modified on 09/07/2018 10:49 am MST

API Goals in campaign builder are ways to connect your app integrations to your campaign sequences. Configure your API goal, then connect the goal to a sequence. For an example, check out how to create custom API goals when using the BigCommerce integration

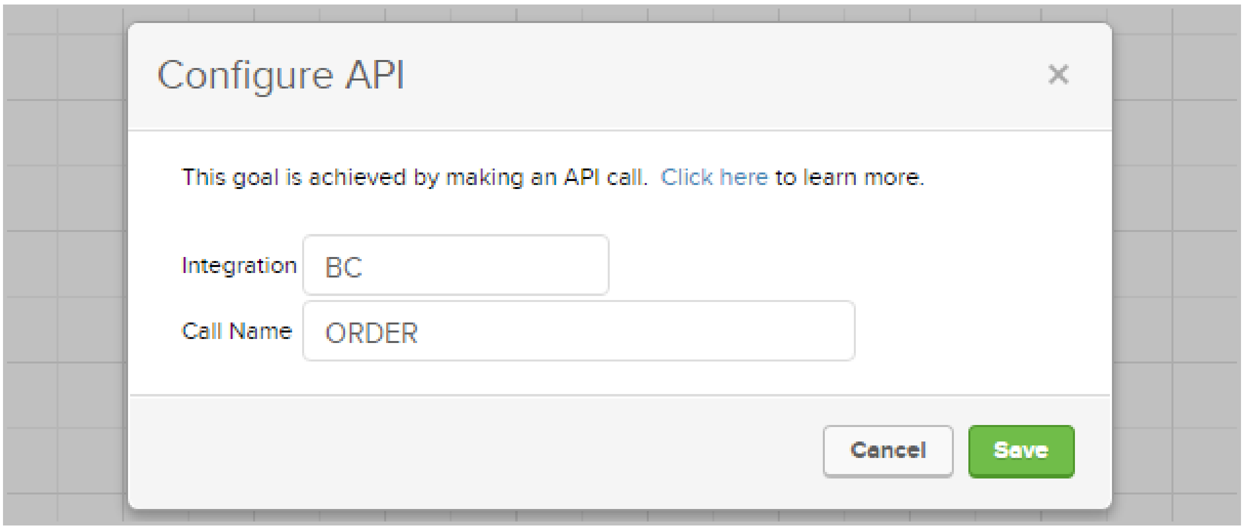
1. Drag an API goal onto the canvas



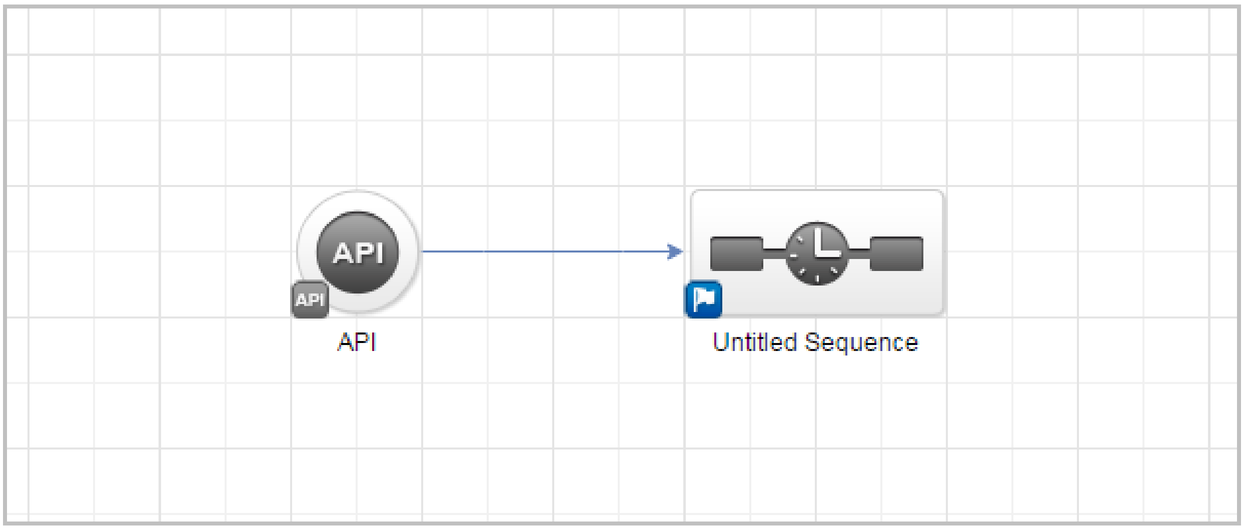
2. Double-click it to configure



3. Configure the API goal. The **Integration** and **Call Name** can be anything you want, or these values will be provided to you by the 3rd party app developer.



4. Connect the API goal to a sequence and test your API call



5. For more information about our REST API, please see our documentation, here

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Creating a Web Form with Firefox

Last Modified on 09/14/2018 2:52 pm MST

With the Java 8.0 upgrade features with the Web Form builder are not compatible with Firefox. Since we are focusing our efforts on a new builder experience you have two options.

Option 1:

Click here to download Chrome.

Option 2:

Click here to learn how to create a Landing page to use as a Web Form.

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Campaign Sequence Overview

Last Modified on 07/23/2018 2:09 pm MST

A campaign sequence is a scheduled series of communications and/or processes that are set in motion when a campaign goal is achieved, or a business event takes place. Campaign sequences are integrated into a larger campaign strategy. Like a campaign, a sequence is created by adding drag & drop objects onto a blank canvas. When an object is added to a sequence canvas, Infusionsoft automatically generates the related feature.

Timers

Timers are used to define a sequence schedule.

- **Start Timer**: The start timer is required and is already placed on the sequence canvas to mark the beginning of the sequence. A campaign sequence may include more than one communication or internal business process that run in parallel to one another (e.g., a marketing series of communications and a work flow process.) If this is the case, you may want to add additional start timers.
- **Delay Timer**: The delay timer determines the time that elapses between the automated communications or processes.
- **Date Timer**: The date timer allows you to run a step at a particular calendar date and time.
- **Field Timer**: The field timer runs a step based on a date field (or date/time field) in the contact record (e.g., Birthday, Anniversary, or your own custom date or date/time field.)

Communications

The communications are generally the emails sent to the contact who is progressing through the campaign. The default email settings can be changed to send a notification email to an internal staff member, an outsourced service provider, or anyone else. The communications options are the following:

- Email
- Voice
- Fax
- Letter

Processes

Process objects handle segmentation and work flow automation. They include objects that update tags, tasks, opportunities and an HTTP post to another server. These objects do not send communications directly to a contact. They keep the contact record up to date and assign responsibilities to Infusionsoft users.

- Apply/Remove Tag: Tags are searchable labels that are used to segment contact records and track certain contact activity. They are also used to signify goal completion in the high level campaign strategy.
- Apply Note: The note object adds a date stamped note to a contact with standardized comments. They are often used to mark a relationship milestone. These notes do not initiate any automation. They are also hidden from users so they cannot be used to manually add a contact note.
- Create Task: The task object assigns one specific responsibility to an Infusionsoft user. The tasks are generally related to predictable events, like a welcome call after a new customer purchases. After a task is assigned, the user is responsible for manually updating it and adding a completion date.
- Assign an Owner: This object allows you to assign an owner (an Infusionsoft user) to a contact record.
- Create Opportunity: The opportunity object assigns a sales process responsibility to a sales rep. The opportunity is worked over a period of time, until the deal is won or lost. Sales reps use opportunities to store sales process notes, track prospect progress through various sales stages, and keep a record of product interests and potential revenue.
- Fulfillment List: This object allows you to set up an automated fullfillment process. This is typically used for direct mail purposes, like printing lables and shipping free gifts.
- Send HTTP Post: The HTTP Post object sends information from Infusionsoft to an outside web page to trigger a script. The script may add or update members in a membership site, process the posted information and feed updates back into Infusionsoft, and more.

Notes

The notes object can be used to document the purpose of a sequence, the intended audience, the call to action, or the goal that the sequence is driving towards. Notes help you track general sequence information and make it easier to transition responsibilities when staff changes take place. You can add multiple notes objects to a sequence canvas.

Connecting Objects In A Campaign Sequence

Last Modified on 07/23/2018 2:09 pm MST

A sequence is assembled by arranging a series of timer, communication, and process objects on the sequence canvas. If only one series of objects is needed, connections are automatically created as you add objects to the canvas from left to right. If there is more than one series of objects in a sequence (e.g., a communication series and a work flow series), then you will manually connect sequence objects.

Each sequence series is a linear process. Each object connects to one other object. If an object is not connected to a previous sequence object, it will not run. If there is more than one series of objects in a sequence, they run simultaneously. Connections are active as soon as a campaign is published. However, the related sequence objects (timers, communications, and processes) will not run until they are also configured or marked as Ready and published to the campaign.

Start Timer to Any Object

The start timer is required. Do not delete it! A start timer can be connected to a timer object or communication/process object.

- Connect the timer to a communication/process object first if you want them to happen immediately.
- Connect the start timer to a timer object first if you want to delay the first communication/process in the series.
- If you want to start multiple processes within the same sequence, just add more start timers.

Timer to Communication/Process

- If the timer between two communication/process objects is configured, the sequence holds the future item (to the right of the timer) until the timer schedule is met, then the sequence proceeds.
- If the timer between two communication/process objects is not configured, the sequence will run until it reaches the unconfigured timer, then it will pause until the timer is configured.
- If all of the sequence timers are configured, but some of the communication or process pieces are not configured or marked as ready, the sequence will skip the unfinished pieces and proceed to the next ready object.

Communication/Process to Communication/Process

If there is no timer between two communication/process objects in a sequence, they will run simultaneously.

Timer to Timer

You can connect a timer to another timer, but this does not really make sense. One timer between objects provides many flexible scheduling options.

Multiple Series within a Sequence

You can create multiple communication and/or process series within a single sequence. All of the series run in parallel. You may create multiple series when the sequence requires external communication to a prospect or customer and internal communications or processes. Creating two series allows you to segment and track each one separately. When a new client signs up with Rainy Day, they send a welcome series to the client, but also start an internal work flow series to schedule a task for one of their admins to create a new client file.

1. To insert a new object between existing connected objects, drag and drop the object when the connecting line becomes bold.

2. To delete an object, click on the object, then click the delete icon.
   Warning! If you delete a communication piece, the custom content you've added will also be deleted. If you want to be able to restore a communication piece, you must save it as a template before deleting it from the sequence canvas.

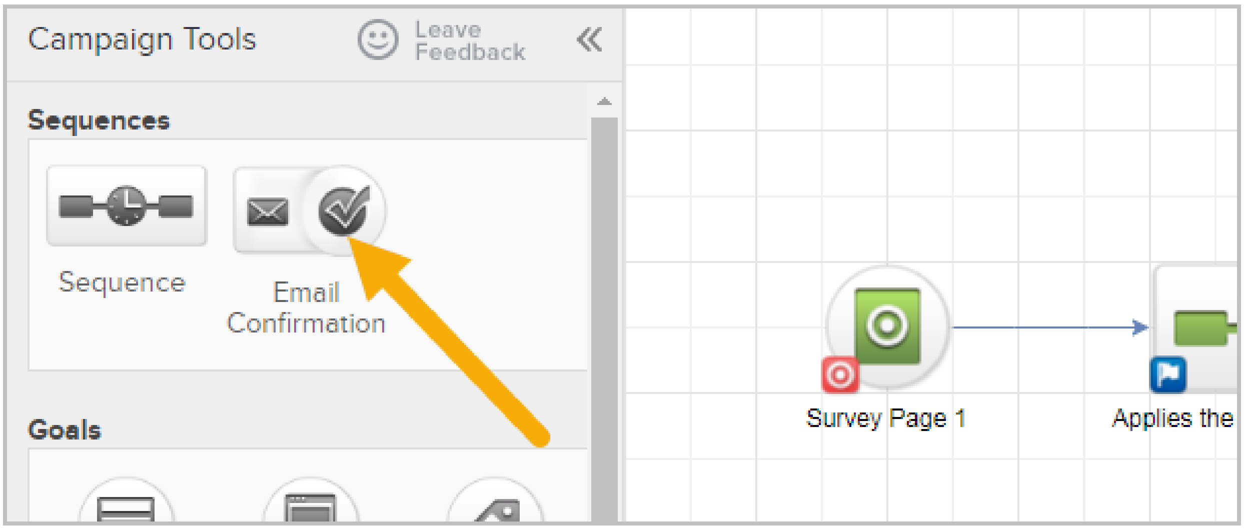
Using a different version of Infusionsoft? Click Here to learn more

Email Confirmation Sequence

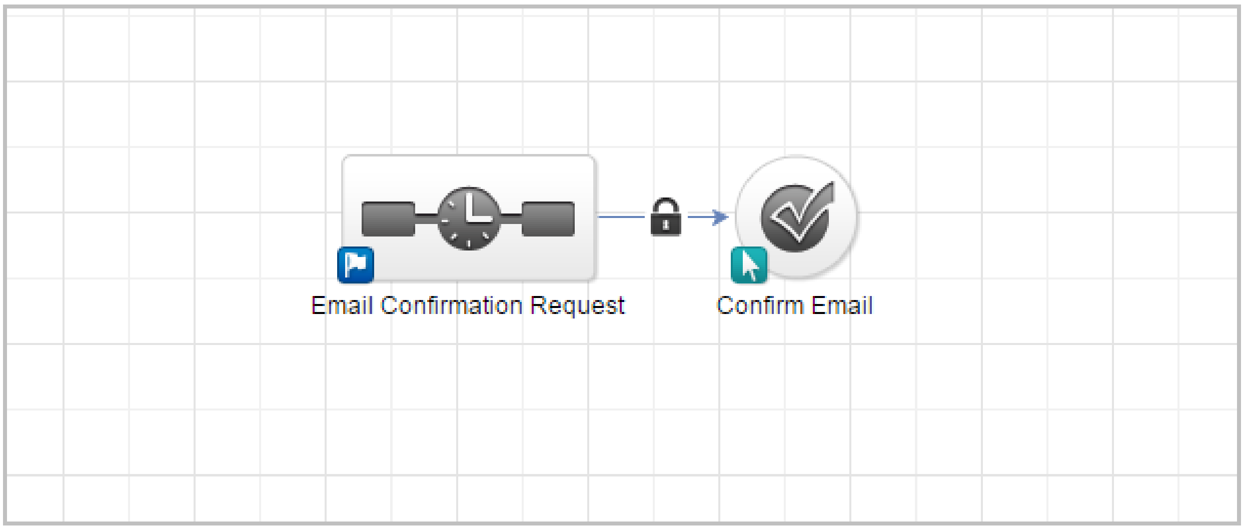
Last Modified on 07/23/2018 2:13 pm MST

An email confirmation sequence is a special type of sequence that will send an email confirmation request to contacts who opt-in to a campaign. This gives you the ability to focus your marketing efforts on people that have confirmed their email address.

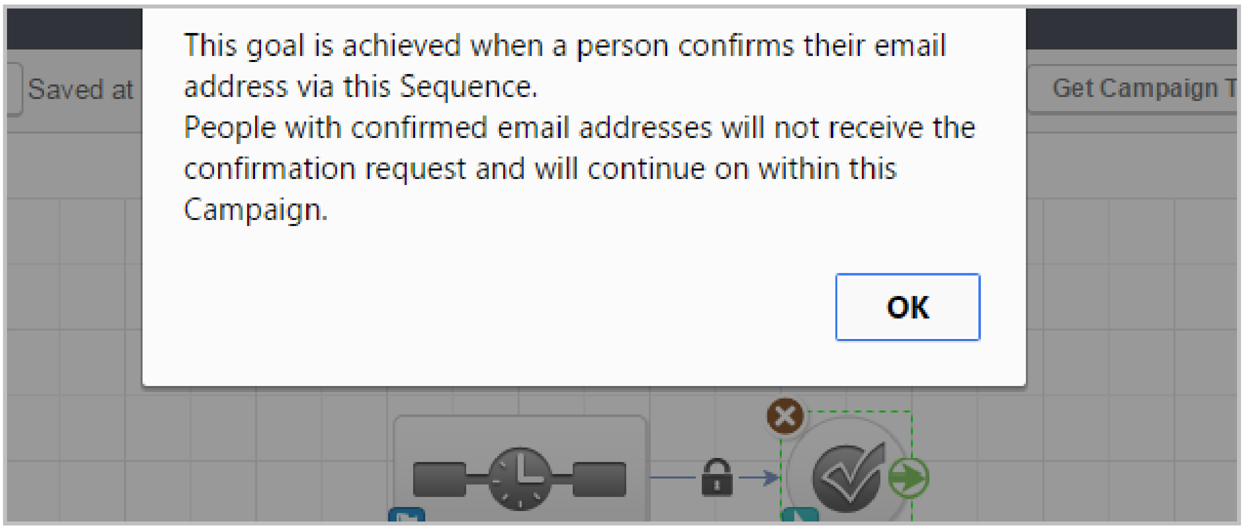
1. Drag out an email confirmation sequence onto the campaign canvas and connect it to a goal - like a web form or landing page.



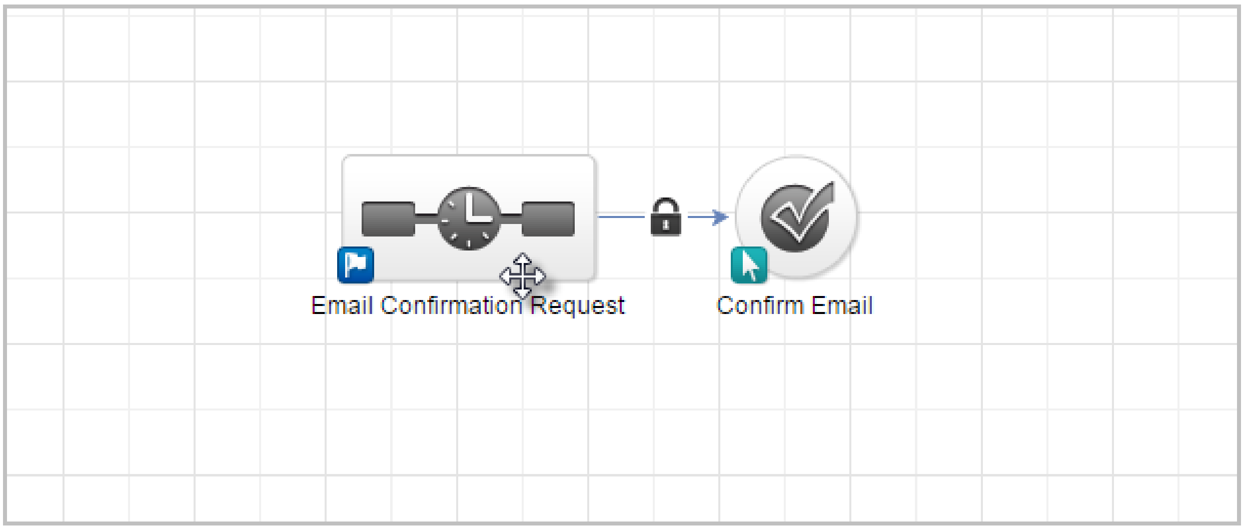
2. The item transforms into an email confirmation request. The sequence is locked to the confirmation goal.



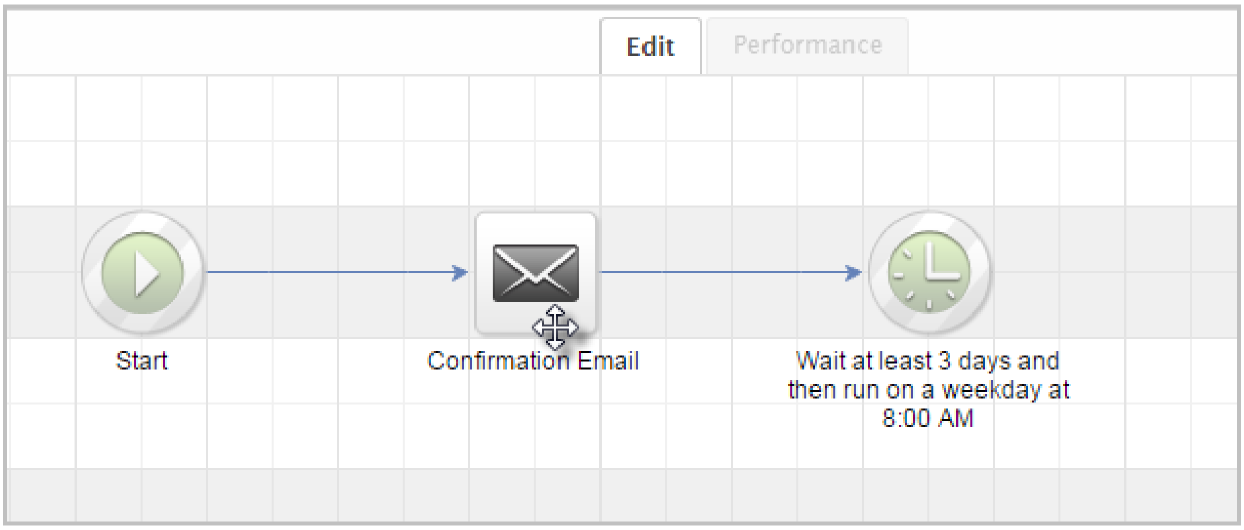
3. If you double-click the goal, you will get a message stating that if someone already has a confirmed email address, the sequence will be skipped. In this case, the person will move to the next step in the campaign.



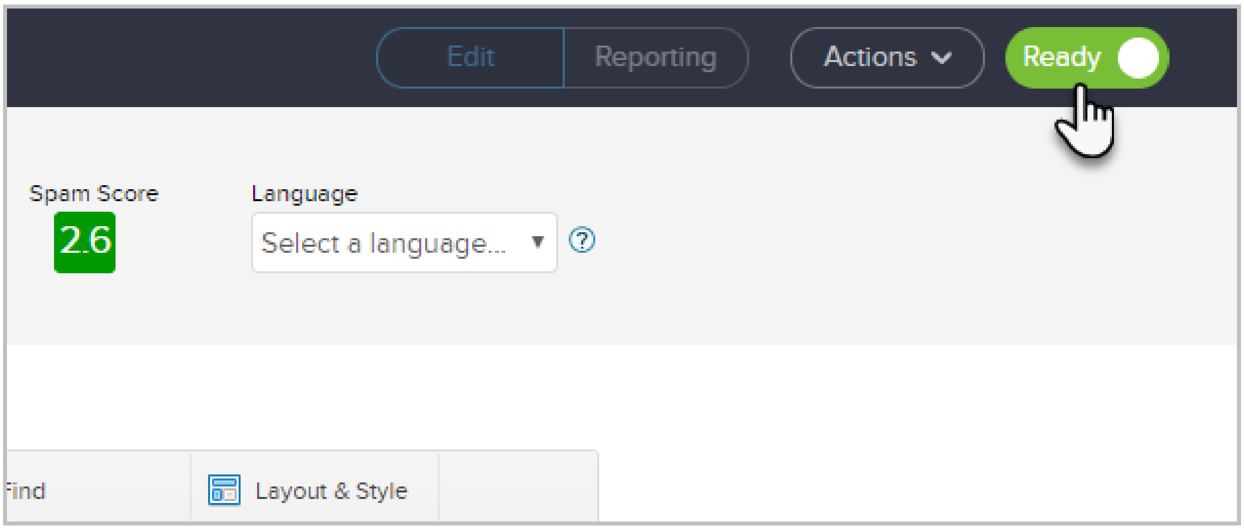
4. Double click on the email confirmation request sequence.



5. Double-click the confirmation email. It opens the email builder with locked-down content and very limited customization. You will see an interlocked email communication item and a delay timer. You cannot add or remove anything from the locked sequence. These sequences are designed to be CAN-SPAM compliant and have limited customization options.



6. When you are finished editing the email, change the status to **Ready**.



7. You are ready to Publish your changes.

   Pro Tip! You can add another email confirmation as a reminder if the contact does not immediately confirm their email address. The purpose of this sequence is to remind the person to confirm their email in order to receive the information they requested.

Using a different version of Infusionsoft? Click Here to learn more

Campaign Sequence How-To

Last Modified on 07/23/2018 2:12 pm MST

The Sequence is where the Automation happens. This can be as simple as sending an Email after a Web Form filled out or a complete process of creating assigning contact owners, tasks, follow up emails, and more.

Timers

If the timer between two communication/process objects is configured, the sequence holds the future item (to the right of the timer) until the timer schedule is met, then the sequence proceeds.

If the timer between two communication/process objects is not configured, the sequence will run until it reaches the unconfigured timer, then the contacts will skip the communication/process objects following the unconfigured timer.

If all of the sequence timers are configured, but some of the communication/process pieces are not configured or marked as ready, the sequence will skip the unfinished pieces and proceed to the next ready object.

Timer to Timer - You can connect a timer to another timer, but this does not really make sense. One timer between objects provides many flexible scheduling options.

If there is no timers between communication/process in a sequence, the communication/process will run immediately.

Communications

Communications are generally emails sent to the contact who is progressing through the campaign. Email's can be sent to a internal staff member, an outsourced service provider, or anyone else.

Process

Handles work flow automation. They keep the contact record up to date and assign responsibilities to Infusionsoft Users. Click the icons on the Process Image to learn about that specific Process.

Apply/Remove Tag

Tags are searchable labels that are used to segment contact records and track certain contact activity

Apply Note

Apply Note adds a date stamped note to a contact with standardized comments. They are often used to mark a relationship milestone. These notes do not initiate any automation. They are also hidden from users so they cannot be used to manually add a contact note.

Create Task

Create Task assigns one specific responsibility to an Infusionsoft User. After the task is assigned, the User is responsible for manually updating it and adding a completion date.

Create Appointment

The Create Appointment will create an appointment based on the date the contact enters the sequence or using a Date Field in the contact record.

Set Field Value

Automatically set the value of a field in the contact record; this includes both standard and custom fields. You can specify to overwrite existing data in that field, or preserve existing data and only execute this step if the field is blank. Date Fields have an option to use the date when the contact reaches that point in the sequence

Note: Fields that cannot be update are : Name, Phone, Address, Main Email, and SSN. Also, Merge fields also do not work in Set Field Value.

Assign an Owner

This object allows you to assign an owner (an Infusionsoft user) to a contact record.

- Assign to User: This option allows you assign the contact record to a specific user in your Infusionsoft application.
- Assign using Round Robin: A round robin is a set of distribution rules based on numeric logic. Round robins are created outside of the campaign builder (CRM>Settings>Round Robins).

Create Opportunity

When you add the "Create Opportunity", you assign the opportunity to a specific sales rep or a round robin . You also define a sales stage. Before you configure the opportunity objects you need to:

- Assign Infusionsoft User to the "Sales Rep User Group" located in the **User Record > User Group** tab
- Set up a Round Robin if you will being using a Round Robin to assign Contacts (**CRM>Settings>Round Robins**)
- Create Opportunity Sales Stages (**CRM>Settings>Sales Pipeline**)

Fulfillment List

Is a spreadsheet containing contact information and/or include an attachment.

Delivery: There are two ways to deliver a fulfillment list:

- A User's Dashboard
- An email address
- Optional queue jobs to only send when X amount are ready to be fulfilled within a specific amount of days

User's Dashboard: This delivery option is typically designed for companies that do their own fulfillment, or want to check over the spreadsheet before sending it to external fulfillment. The User will see the fulfillment job on their dashboard, click to open it, and then mark the fulfillment as complete when they are done.

An Email Address: The fulfillment is automatically attached to the email (.csv file type) and then sent to the recipient. If you use an external fulfillment company, this will allow you to automate your fulfillment process.

Add to CustomerHub

Creates the Contact's login information (Username and Password) Note: Requires a CustomerHub license.

HTTP Post

Is used to send information from Infusionsoft to a Web Page that runs a script (e.g., ASP, PHP, Javascript.) which extracts data from the URL and processes it on your web server. Only standard port numbers are supported. Supported ports are: **80** and **443**.

You can add multiple lines of Name / Value pairs.

- Click the "plus" icon to add another pair
- Click the "minus" icon to remove a pair

Note: You cannot reorder the lines after they've been added. You can only delete and recreate them. Click on to remove a Name / Value line item.

Each line item of the HTTP Post will send 2 pieces of information to the URL: a field *name* and a field *value*

- **Name**: The first field is the name of the field you are sending. For example if you wanted to send the Contact's Email, you would enter "email"
  - For fields with two parts use a _ for the Space i.e. first_name
- **Value**: The second field is for the Infusionsoft merge field value. For example for the Contact's Email you would use ~Contact.Email~
- Click **Merge** to access the Infusionsoft merge field values

When you've finished adding Name / Value lines, click on the **Test** button to verify the post is working as expected.

- "200" response code validates the post is working properly.
- "409" error may mean that the user you selected already has a member record in CustomerHub. Try testing with a different user.
- Other response codes may require troubleshooting

Action Set Legacy

This is a legacy feature that can be used to give you access to additional actions. The most common uses are create order and cancel subscription. First create the Action Set by going to Marketing > Settings > Action Set

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Delay Timers

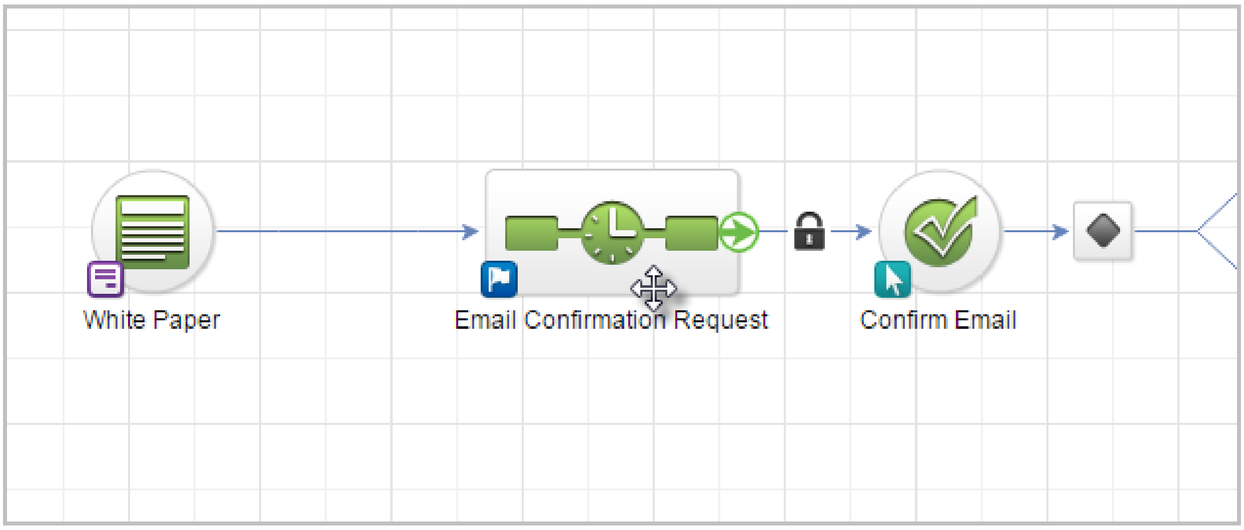
Last Modified on 08/27/2018 10:28 pm MST

Delay timers schedule the amount of time that elapses between sequence communications and / or processes. The delay timer is very flexible giving you a great deal of control over when a communication is sent to a contact. It allows you to simulate personal communications by limiting the schedule to acceptable days (e.g. excluding weekend days) and the acceptable time of day (e.g. within normal working hours.)

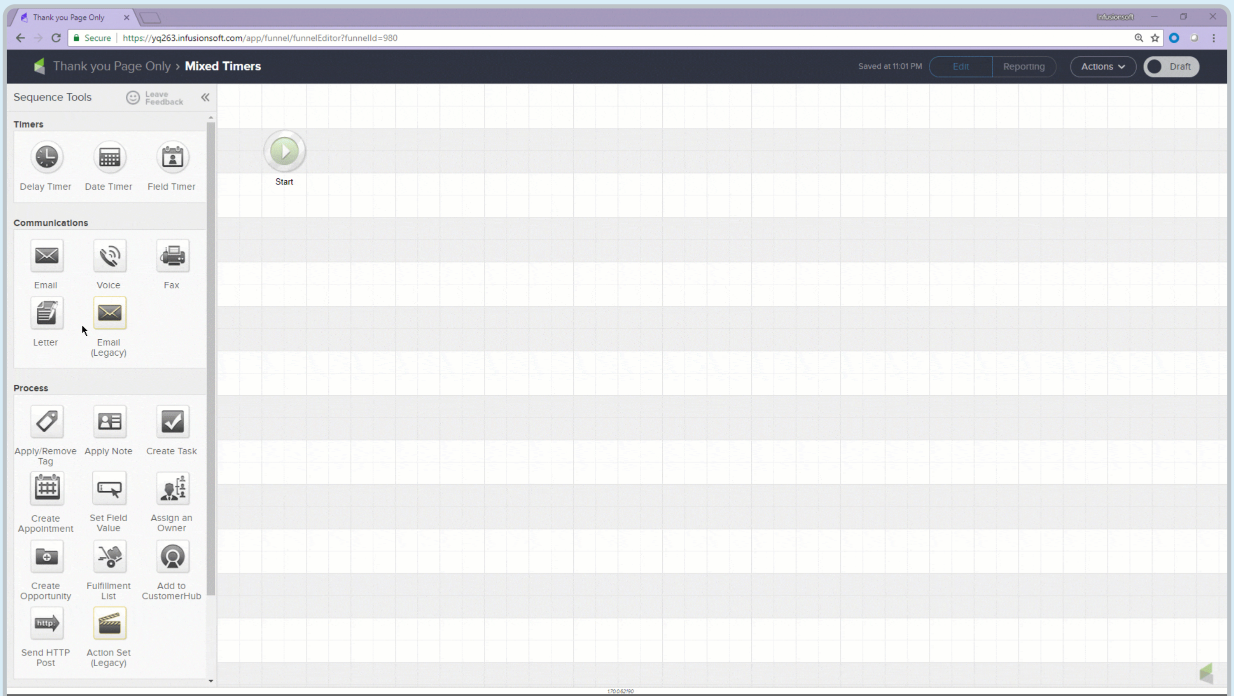
Note: Delay Timers are sequential. They run in order based on their position in the sequence and the individual timer settings. The first timer must run before the second, the second before the third, and so on, regardless of the individual timer settings. Thus changing a Delay timer in an active sequence will affect the order in which the timers run, and can cause contacts to drop.

1. Double-click on the campaign sequence you wish to edit or drag and drop a new

campaign sequence onto the canvas.

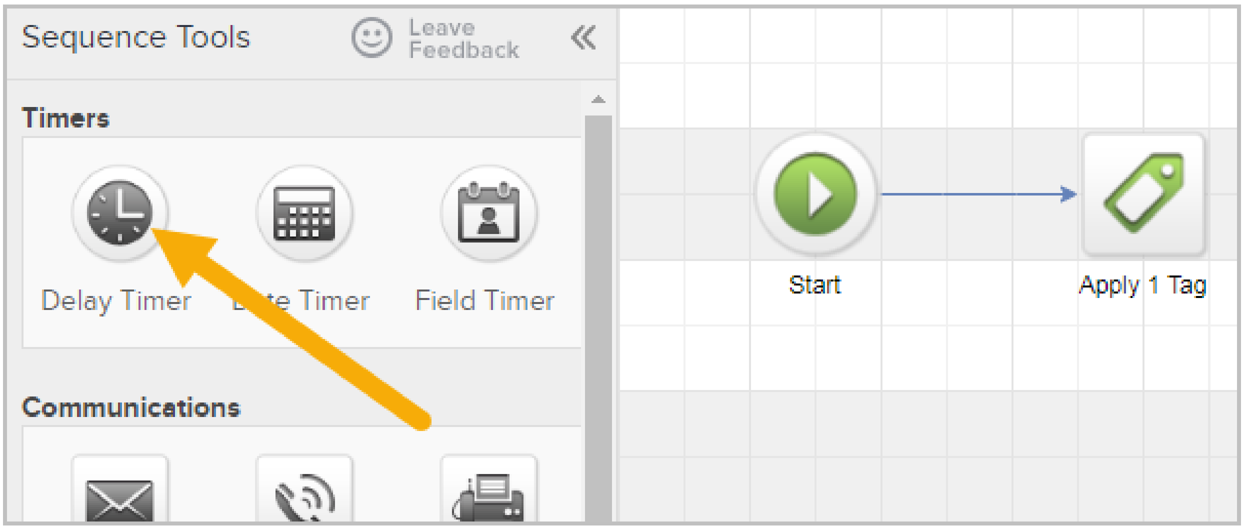


Pro Tip! Only one type of timer can be used per "Start" button. Meaning, no Start > Email > Delay Timer > Task > Date Timer. The Date Time would need to be on it's own "Start" button.



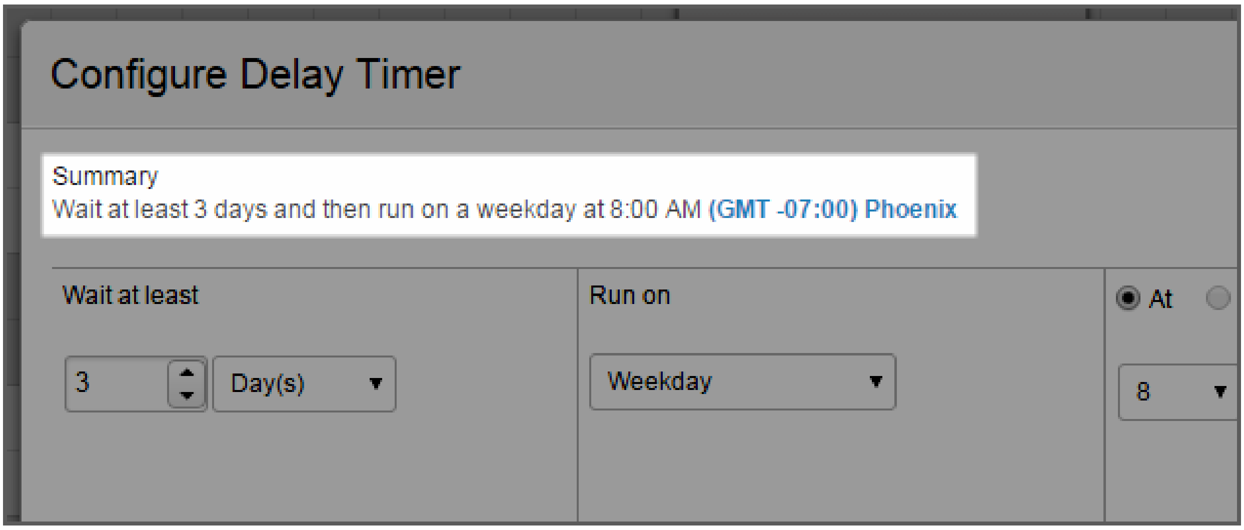
Click to view larger

2. Drag a Delay Timer onto the canvas and double-click it to configure.



3. The default delay schedule shows up on the schedule summary. This schedule is applied if you save the timer without changing any settings.

4. As you modify the timer settings, the summary updates so you can confirm the revised schedule before saving it.

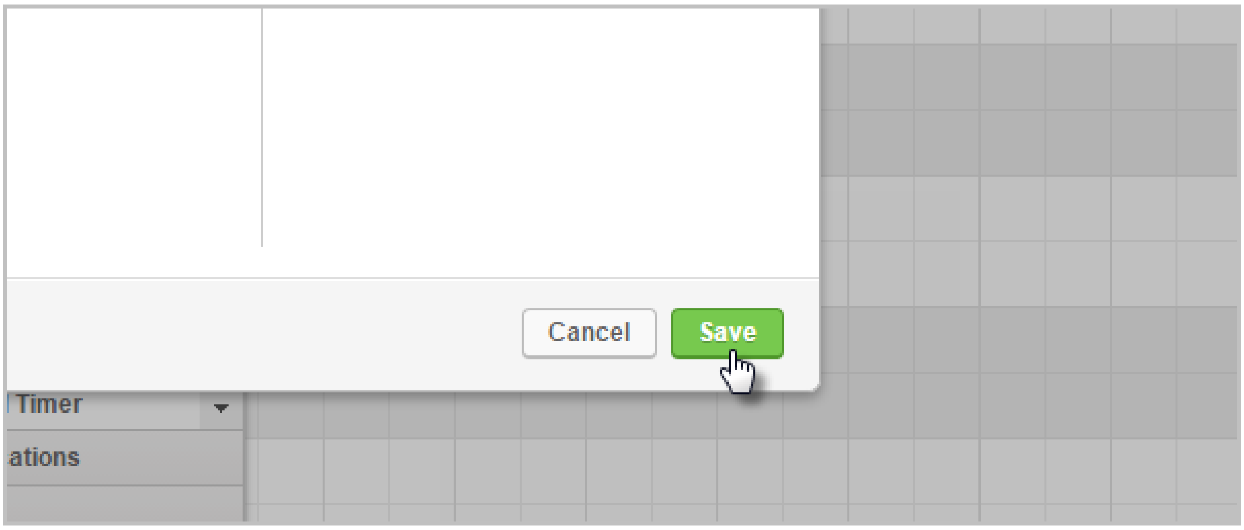


- **Wait at least:** The wait settings configure the minimum required delay for the next sequence piece(s). Use the arrows to choose a numerical value and then select a unit of time from the dropdown. The timer will schedule the following sequence piece on the same day if you are using minutes or hours, as long as the acceptable window of time has not passed for that day. If it has, then the piece will go on the next acceptable day and time.
- **Run on:** The run settings allow you to choose acceptable days, weeks, and / or months. They configure the day and date limitations. The wait settings are taken into account first, then the system looks at the run settings to identify the first acceptable day or date. These settings are very flexible, so you should check the timer summary updates to verify they are configured as expected.

- Weekday: This limits the acceptable days to Monday, Tuesday, Wednesday, Thursday, or Friday. If the wait setting alone would schedule a piece to go out on Saturday, the run setting will make sure the piece does not go out until the following Monday.
- Weekend: This limits the acceptable days to Saturday and Sunday and will hold sequence pieces until one of these two days.
- Day Of Week: This allows you to define a limited number of acceptable days based on their position in the month, specific day(s), and /or specific month(s). If you use this setting, the timer will delay the specified wait time, then run on the next acceptable day you define here.
- Day of Month: This allows you to define a limited number of acceptable calendar dates based on their position in the month, specific day(s), and /or specific month(s). If you use this setting, the timer will delay the specified wait time, then run on the next acceptable date that you define here.

- At or Between: The At / Between setting allows you to define the acceptable time, or window of time, for the sequence pieces to run (based on U.S. Eastern Time.) The between option is only available when the time unit assigned to the wait setting is minutes or hours or if "no delay" is selected. This setting makes it easy for you to confine automated communications to the hours associated with a standard work day.

5. Click **Save** to apply the revised timer schedule.



6. Repeat this process to configure or modify the schedule for the rest of the sequence timers.

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Personalized Email Confirmation

Last Modified on 07/23/2018 2:12 pm MST

In the Campaign Builder there is a Confirmation Sequence that will allow your contacts to confirm their email address. However, the Confirmation Sequence is locked and doesn't allow many personalization options. Here is how to create a personalized confirmation email including the campaign setup and contact record example.

Before the Campaign Process is created a tag needs to be configured under the Automation Links >Default Opt-in

Note: Automation Links Do Not work in the campaign builder but as long as you are using the Default Opt-in the tag will be applied.

By default the Link Text for the Default Confirmation Link is "Click Here" but you can change the verbiage.

- Click the Actions Tab from the top right
- From the Actions Drop down select "Apply/Remove Tag"

- Select an existing tag or create a new tag

Next go to Marketing > Campaign Builder where you can then create a New Campaign or add these steps to an existing Campaign.

- Create a sequence with the Confirmation Email
  - In the email use the ~DoubleOptInLink~ merge field which will create the Confirmation Link

- Add a Tag Apply Goal to the End of the Sequence

Contact Record Example

After the contact goes through the campaign and clicks the confirmation link in the email

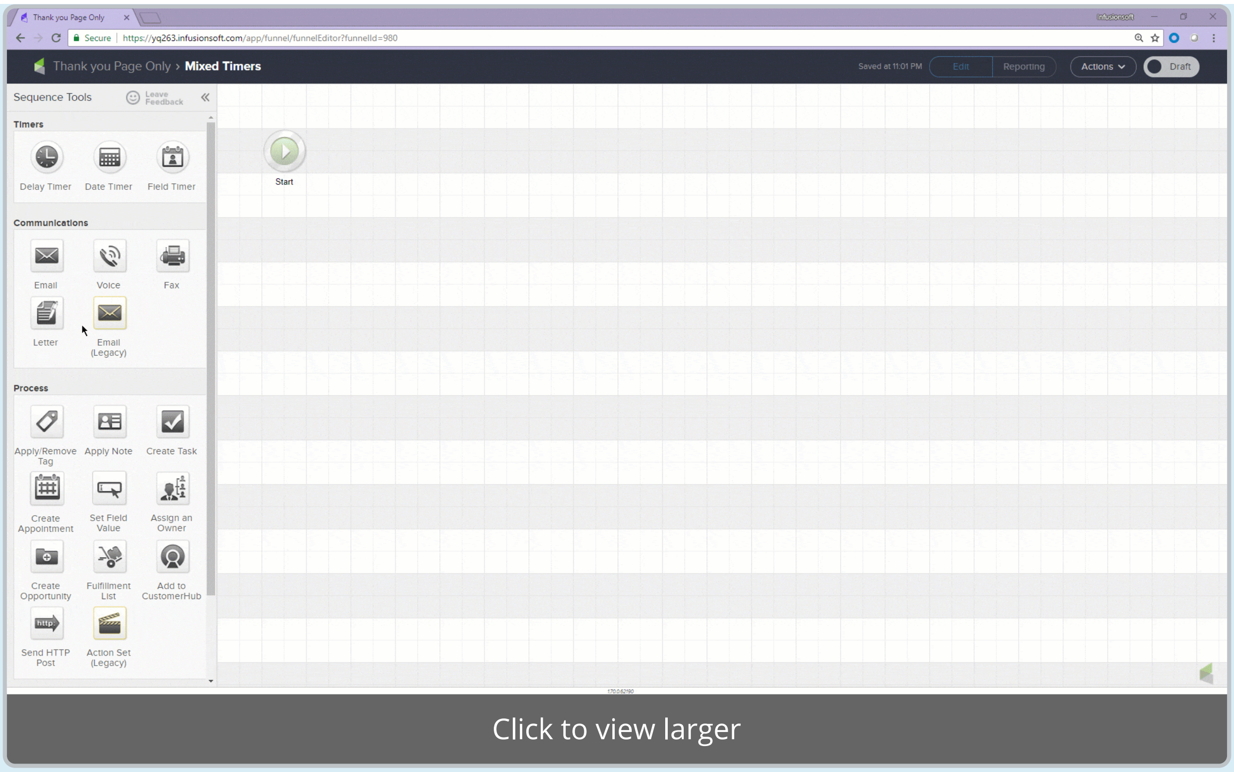
Using a different version of Infusionsoft? Click Here to learn more

Date Timers

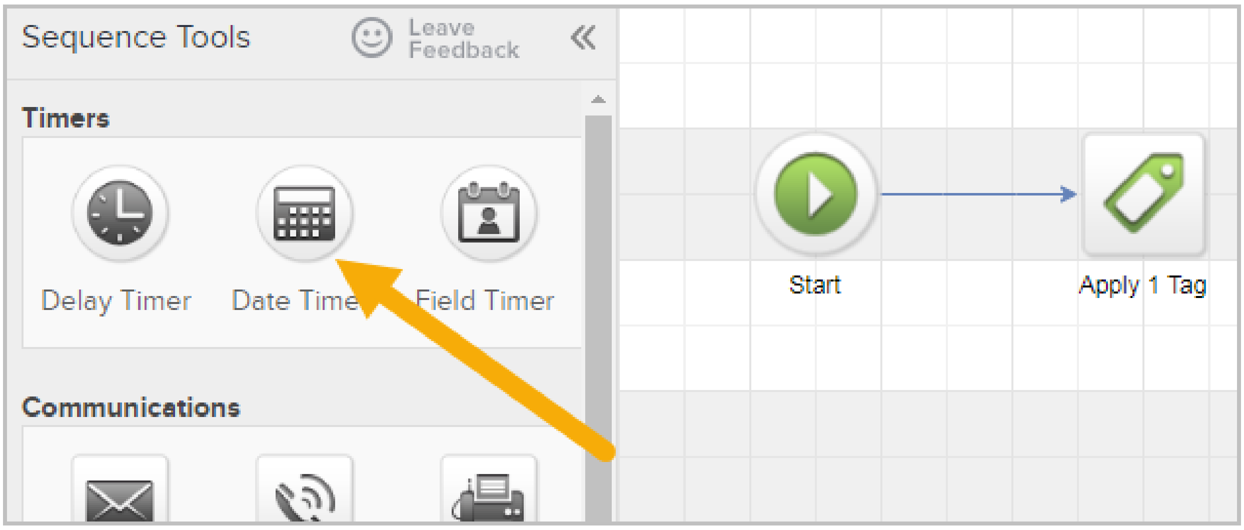
Last Modified on 08/27/2018 10:30 pm MST

Date Timers allow you to schedule a marketing piece at a specific date and time or within a date/time range.

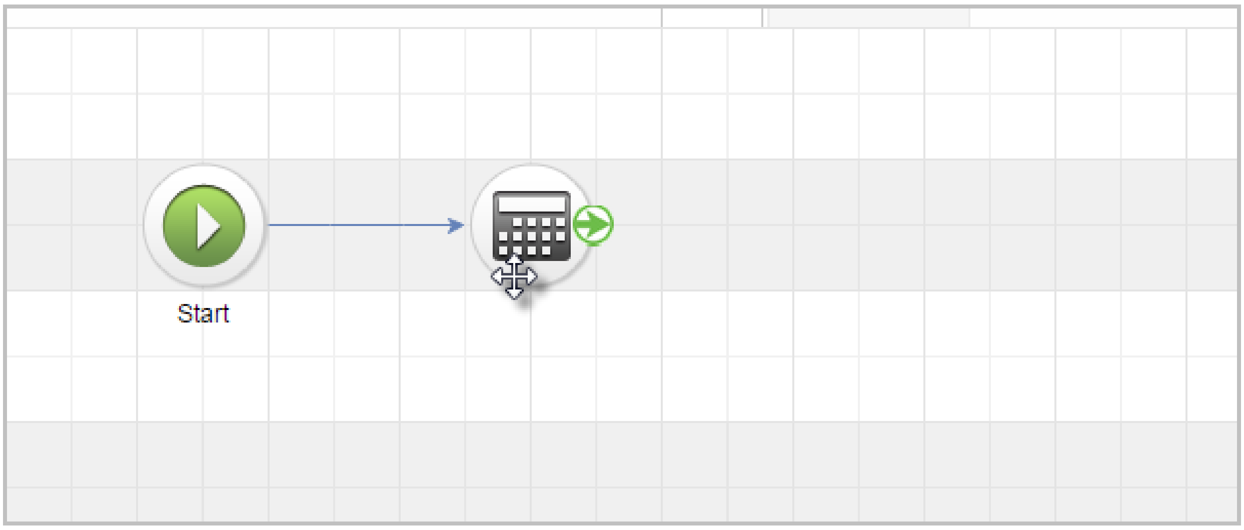
Pro Tip! Only one type of timer can be used per "Start" button. Meaning, no Start > Email > Delay Timer > Task > Date Timer. The Date Time would need to be on it's own "Start" button.



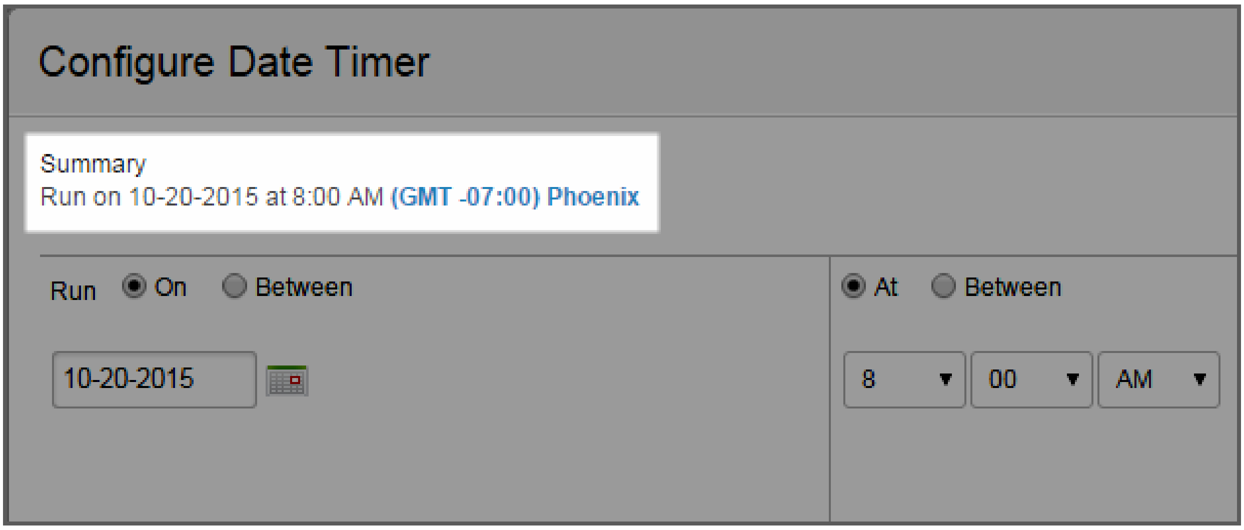
1. Drag the Date Timer snippet onto the canvas



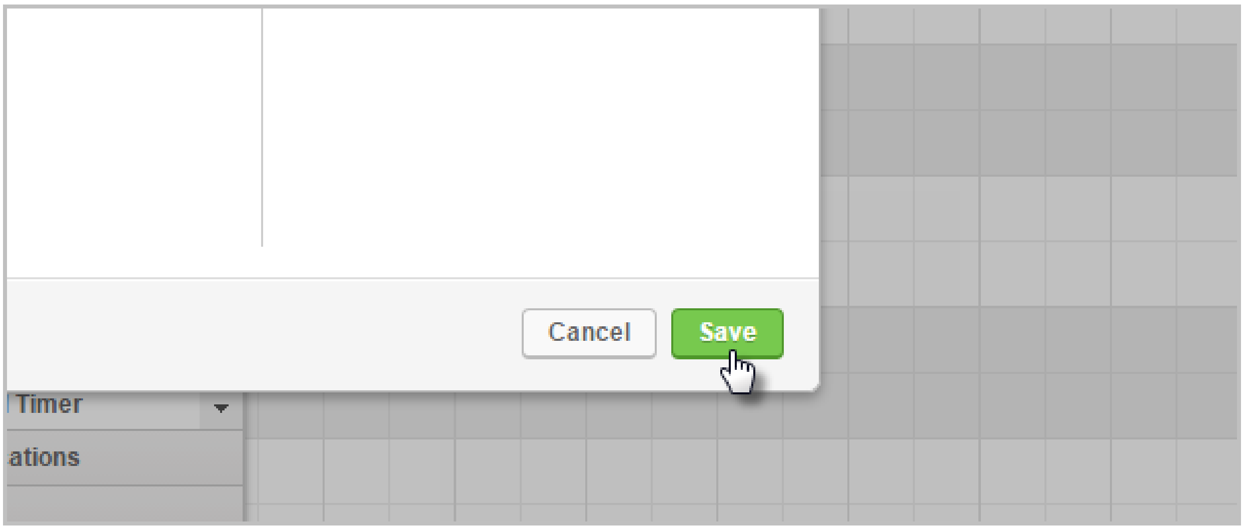
2. Double-click it to configure the settings.



3. Choose to run at a specific date or within a date range. Choose to run at a specific time or within a time range. Note the Summary section to see what day/time it will run.



4. Click **Save**



5. You are now ready to publish your changes.

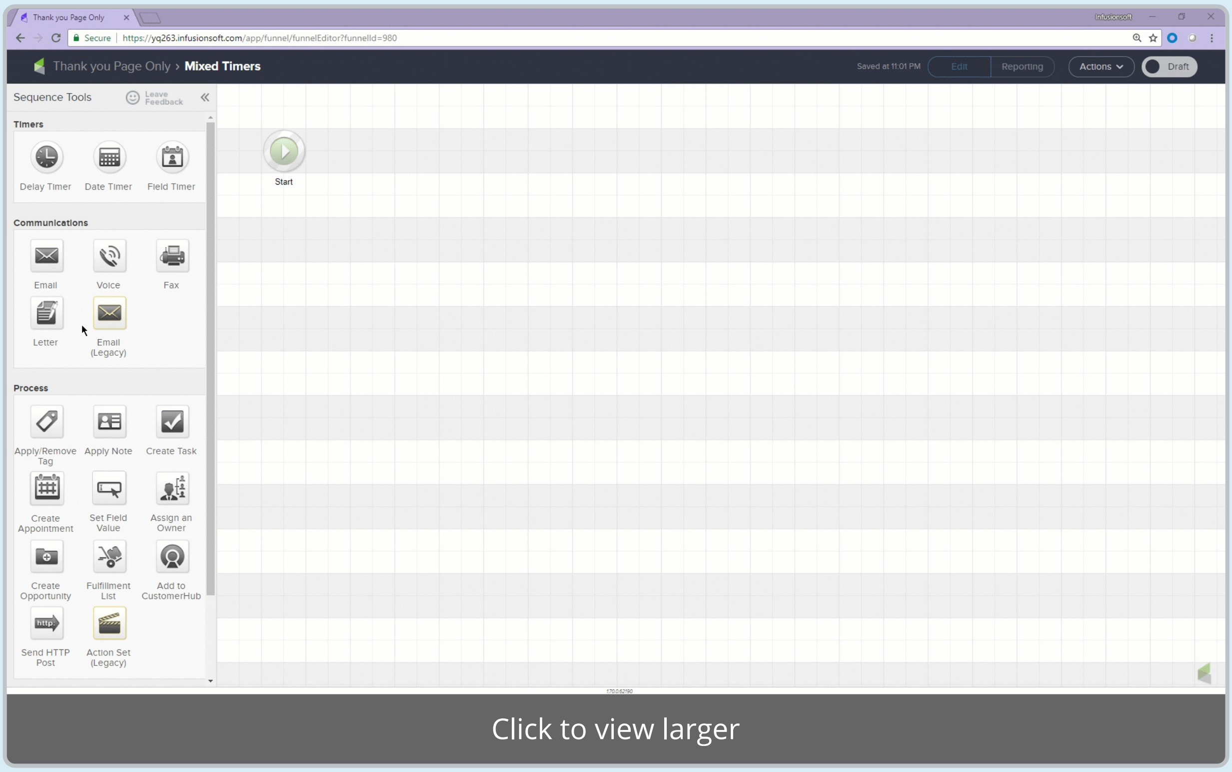
Using a different version of Infusionsoft? Click Here to learn more

Field Timers

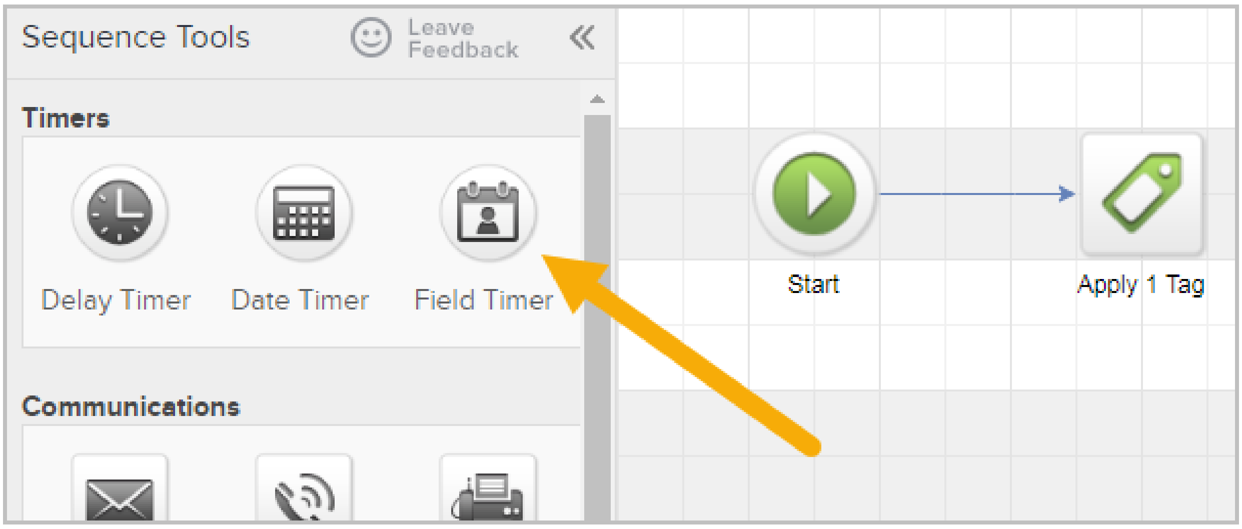
Last Modified on 08/27/2018 10:21 pm MST

Field Timers allow you to schedule a marketing piece based on a date or date/time field in the contact record. There are two default date fields in every contact record: Anniversary Date and Birthday Date. You can also create your own custom date or date/time field.

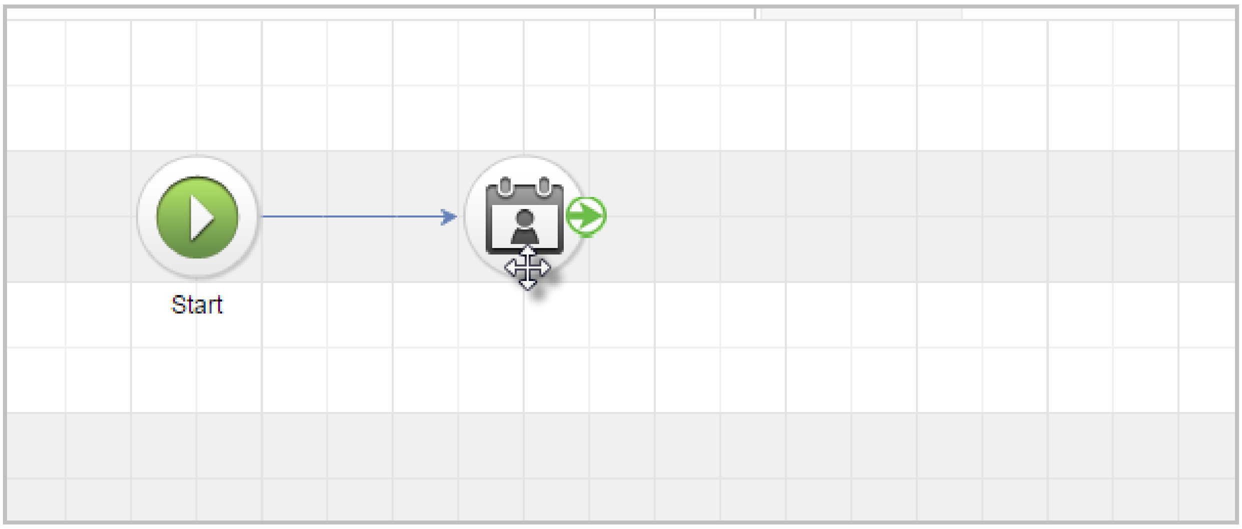
Pro Tip! Only one type of timer can be used per "Start" button. Meaning, no Start > Email > Delay Timer > Task > Field Timer. The Field Timer would need to be connected to it's own "Start" button.



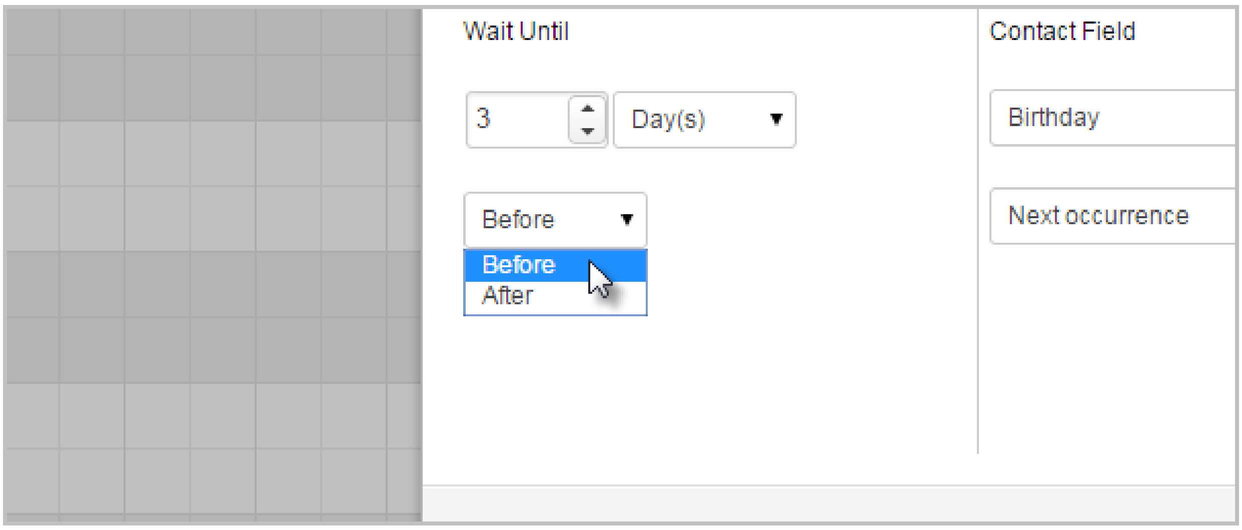
1. Drag the Field Timer snippet onto the canvas



2. Double-click it to configure it.

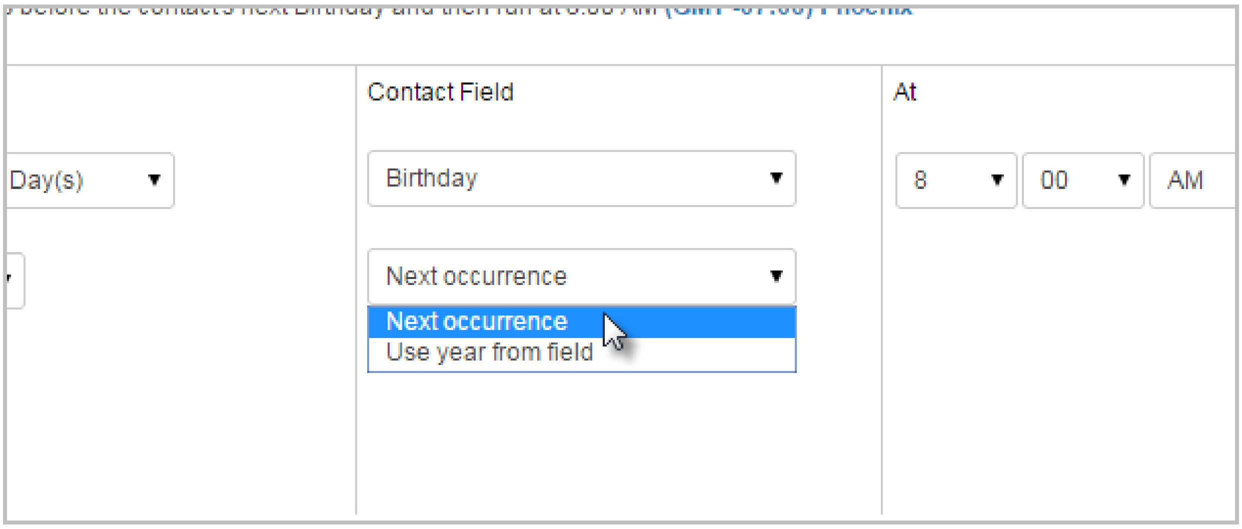


3. In the Wait Until section, select the day(s), week(s), month(s) to delay before or after the custom date.



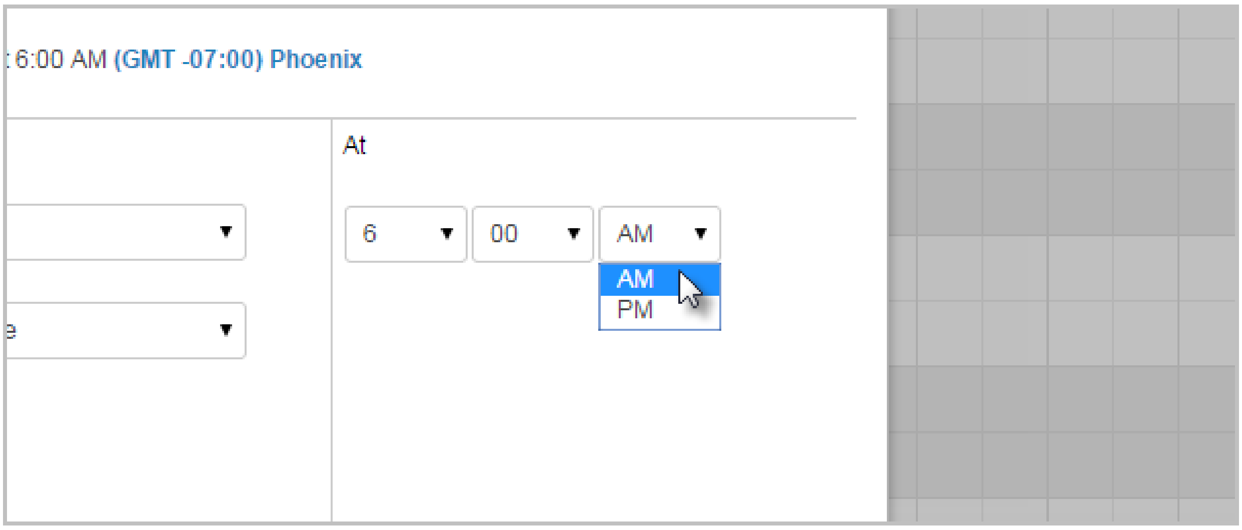
4. In the Contact Field section, select the date field. By default, Birthday and Anniversary

will always show in the drop down. Any new custom date or date/time fields will show here too.



NOTE: Selecting 'Next Occurrence will look at the Mont/Date to schedule the event. Selecting Use Year from Field will look at the Month/Date & Year to decide when to schedule the event.

5. Choose what time of day you would like to send this marketing piece and click **Save**. If you are using a date/time field, this will say "The time specified in the contact field." It will send based on the time set in the contacts custom field.



6. You are now ready to publish your changes.

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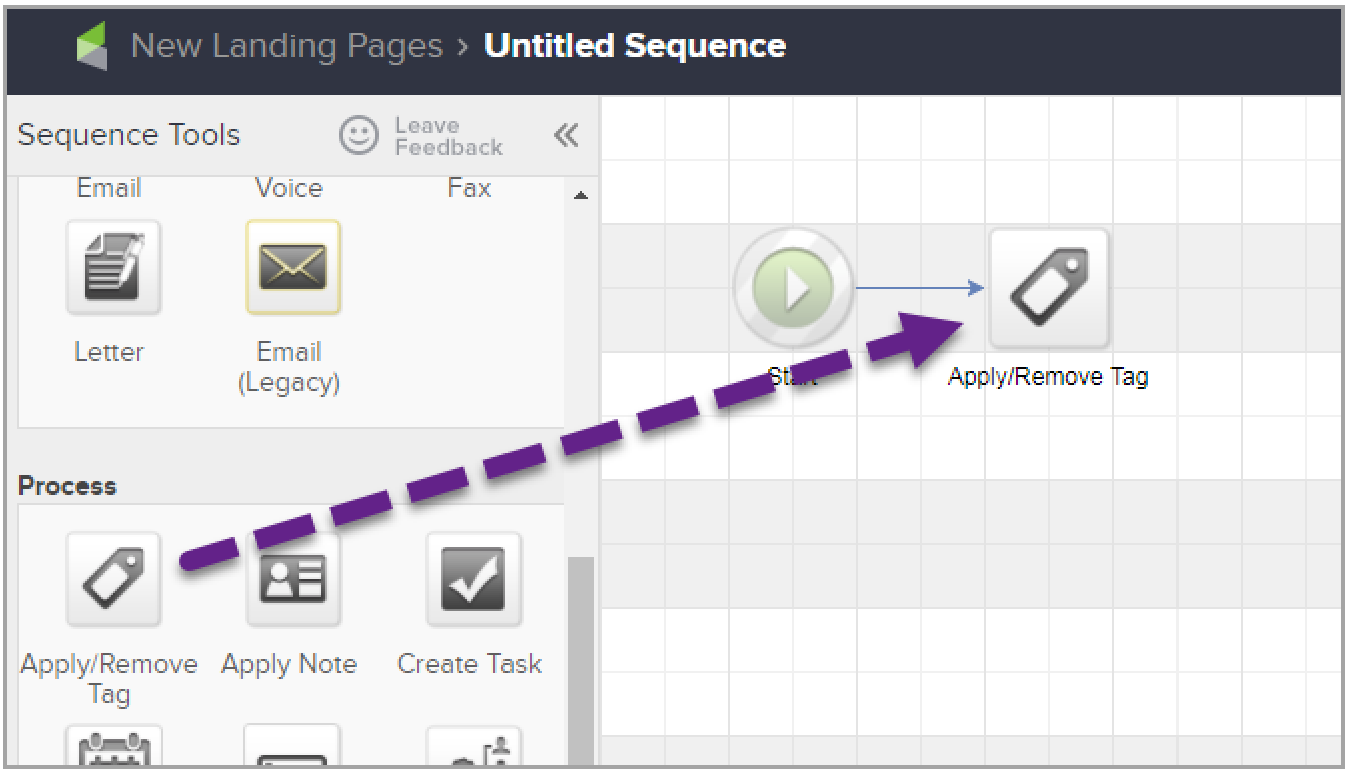
Campaign Sequence Tags

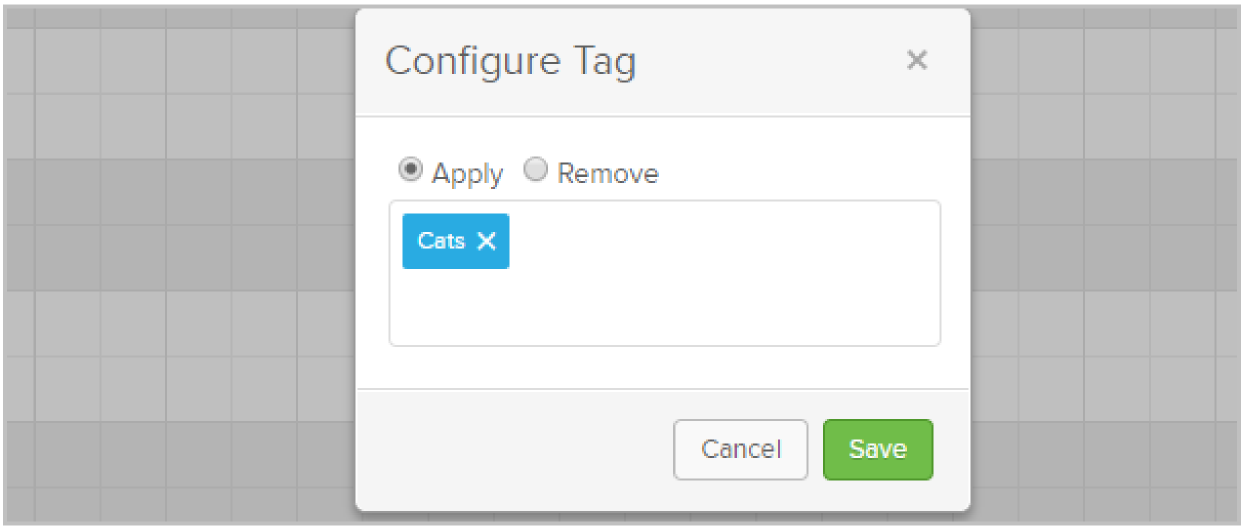
Last Modified on 07/23/2018 2:15 pm MST

- Tags applied at the beginning of a sequence usually define a specific lead magnet (e.g. Video Tips Series), a segment (e.g. Home Buyer), and/or a relationship stage (e.g. prospect.)
- Tags applied in the middle of a sequence usually define a period of time that has elapsed or a milestone. These can help you gauge how long people stay in a sequence before responding to a call to action.
- Tags applied at the end of a sequence can be used to add a contact to a broadcast list (e.g. monthly newsletter) after a period of inactivity or after they've completed a higher priority sequence (e.g. a customer welcome sequence.)

1. Click and drag an **Apply/Remove Tag** object onto the campaign canvas and double-click it to configure.



2. Choose a tag option (*apply* or *remove*) and then enter the tag name into the search box to find a list of possible matches.



3. Click on the tag name to select it or start typing to create a new tag and click the **Create** button to create it. You can repeat this process to add multiple tags.

4. Click on **Save** to apply the tag settings

5. Don't forget to publish your changes when your ready to go live!

Using a different version of Infusionsoft? Click Here to learn more

Campaign Sequence Note Template

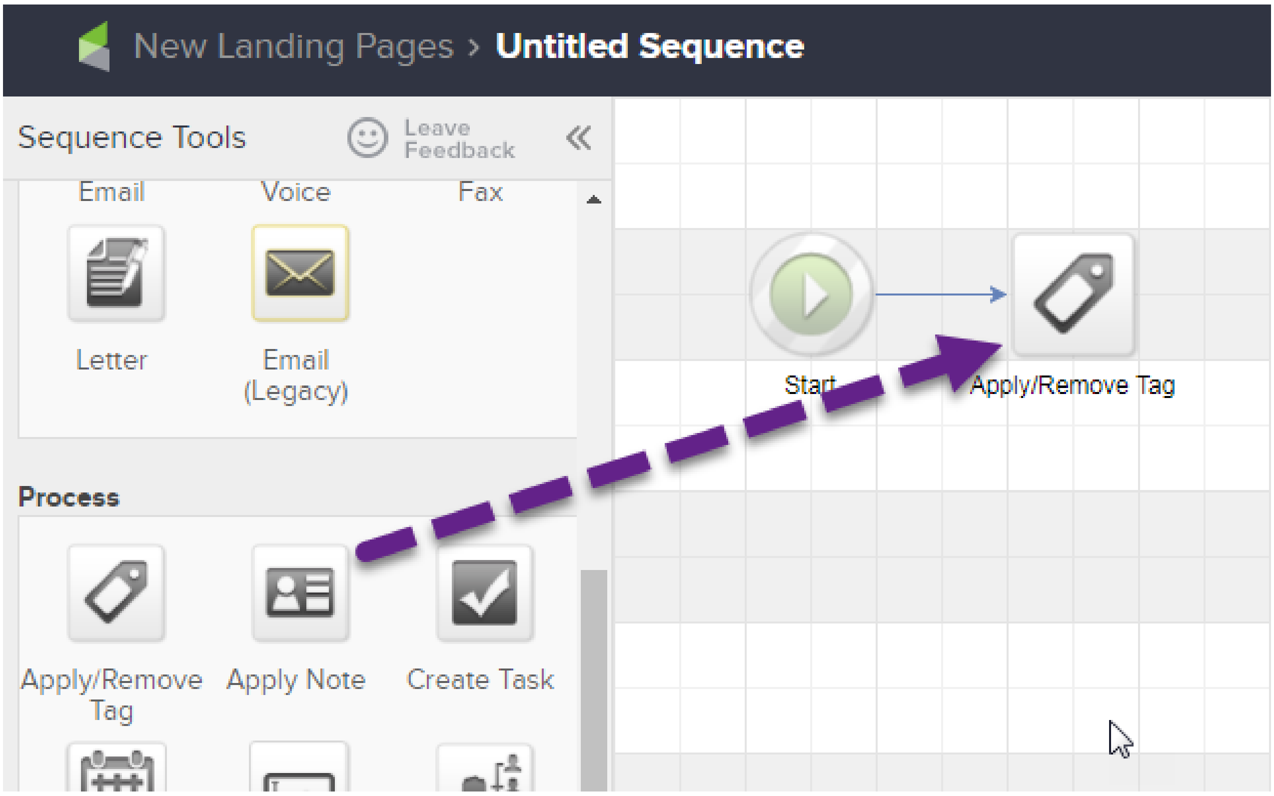
Last Modified on 10/03/2018 1:26 pm MST

The note object adds a date stamped note with standardized comments to a contact history. They are often used to mark a relationship milestone.

Please note! Each note object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Note objects are not archived. If you delete a note object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.

2. Drag and drop an **Apply a Note** object onto the canvas.



3. Double-click the Apply Note icon to configure it.

4. Select an *Action Type* from the drop-down.

5. Enter a Description and Creation Notes. The description is displayed as a link in the contact history. The creation notes provide additional details when the history link is clicked. The description and creation notes should be generic since this note is applied automatically to all of the contacts who reach this point in the campaign sequence.

6. Select a user to attribute this note to. The user name will show up along with the note in the contact history.

7. (Optional) Set up email notifications. Type a user name into the search box and click on a name to select a user. Repeat the process to add more user notifications. These users will receive an email every time this note is automatically applied to a contact through this sequence.

8. Click Save to apply the note settings.

9. Don't forget to publish your changes.

Using a different version of Infusionsoft? Click Here to learn more

Campaign Sequence Opportunity Record

Last Modified on 07/23/2018 2:18 pm MST

The opportunity object assigns a sales process responsibility to a sales rep. The opportunity is worked over a period of time, until the deal is won or lost. Sales reps use opportunities to store sales process notes, track prospect progress through various sales stages, and keep a record of product interests and potential revenue.

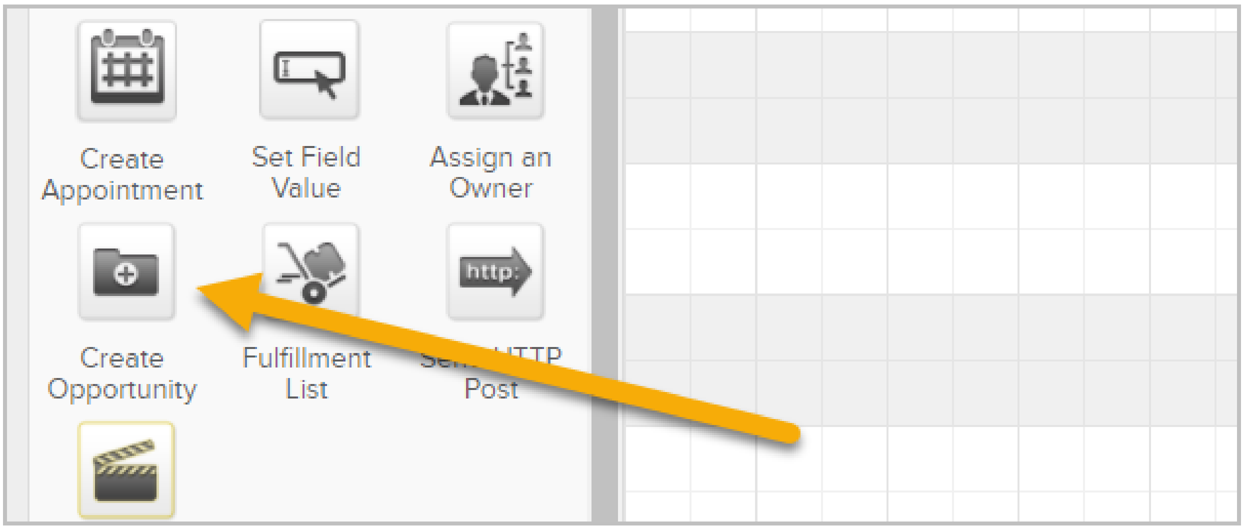
When you add an opportunity object to a campaign sequence, you assign the opportunity to a specific sales rep or a round robin. You also define a sales stage. Before you configure the opportunity objects you need to:

- Assign sales reps to the sales rep user group .
- Set up a sales rep round robin .
- Customize opportunity sales stages .

Please Note! Each opportunity object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. If you delete an opportunity object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.

2. Drag and drop a **Create Opportunity** process onto the canvas.



3. Select a starting stage from the drop down.

4. Select a sales rep user from the drop-down or distribute opportunities among multiple users by selecting a round robin.

5. (Optional) Select a product interest bundle if the product interest is predictable based on the previous campaign path the contact has journeyed through.

6. (Optional) By default, opportunities are created without checking for other opportunities. Turn on the duplicate checking option if you only want to create new opportunities when no other active opportunities exist.

   Pro Tip! This is especially important when distributing opportunities through a round robin. It ensures that each prospect with an active opportunity only works with one sales rep at a time.

7. Assign the next action due date and enter action notes.

8. Click **Save** to apply the opportunity settings.

9. Don't forget to publish your changes.

Using a different version of Infusionsoft? Click Here to learn more

Set Field Value

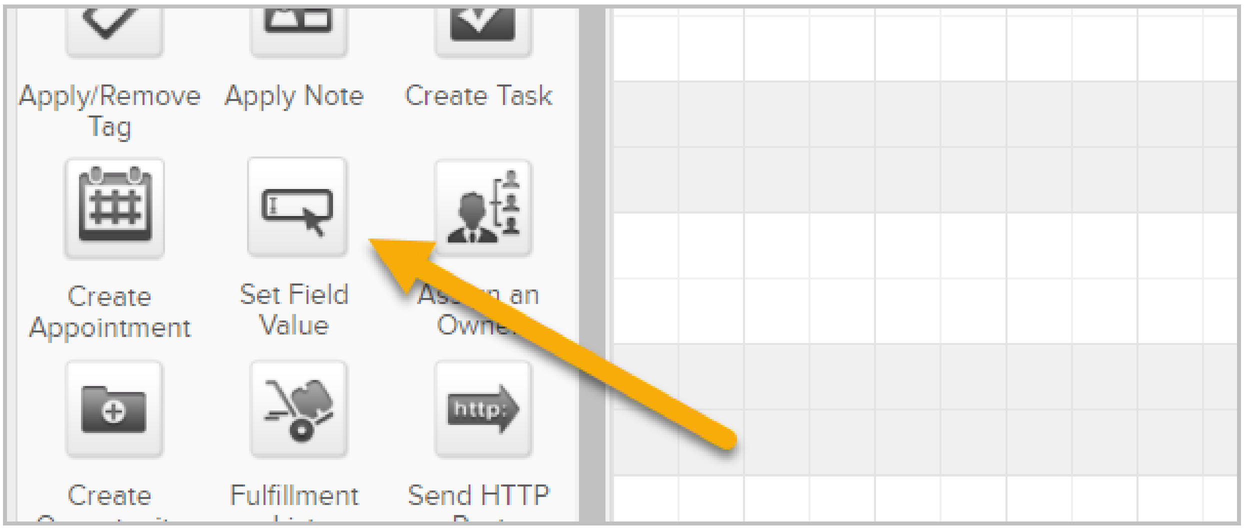
Last Modified on 07/23/2018 2:18 pm MST

You can automatically set the value of a field in the contact record as part of campaign sequence in the campaign builder; this includes both standard and custom fields.

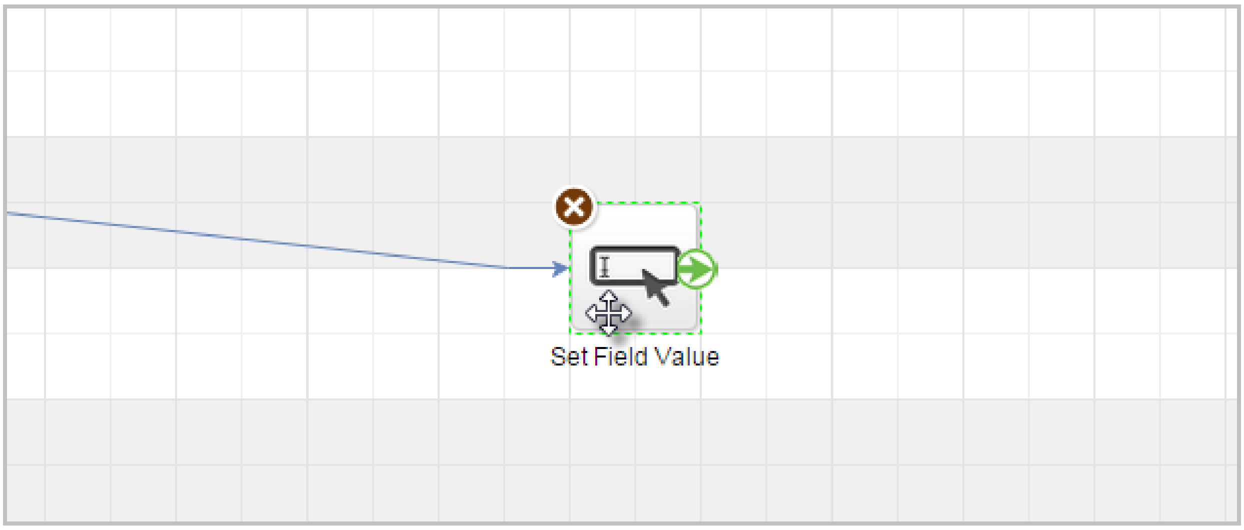
Available Fields The only fields that you cannot update using this process are the following: Name, Phone, Address, Main Email, and SSN.

Please Note! This WILL overwrite data to the existing field.

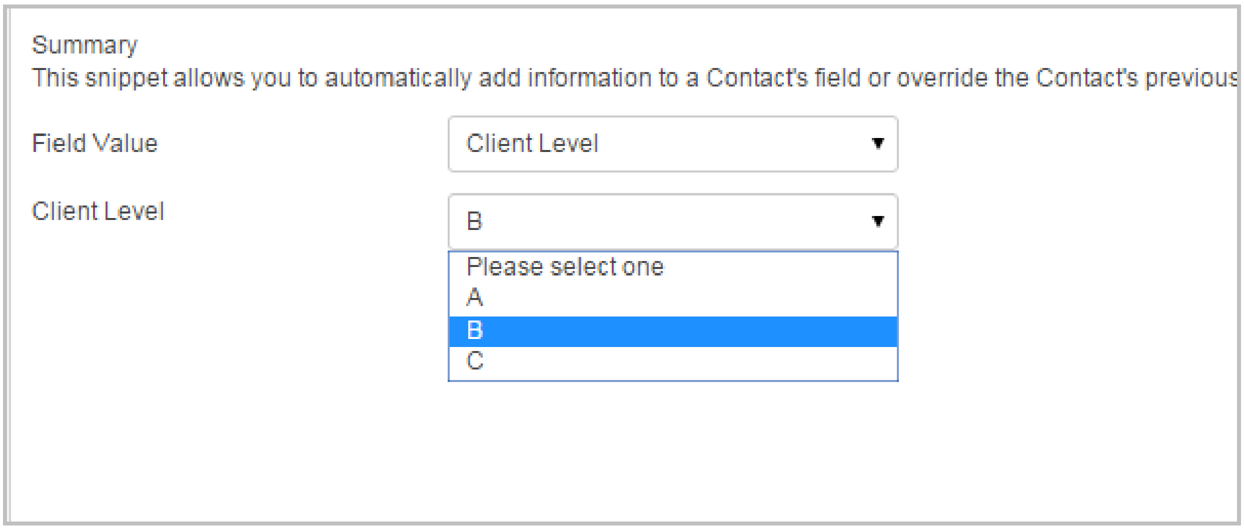
1. Click inside a campaign sequence and drag and drop the Set Field Value object onto the campaign canvas.



2. Double-click the Set Field Value icon



3. Set the field value.



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Campaign Sequence HTTP Post

Last Modified on 07/23/2018 2:19 pm MST

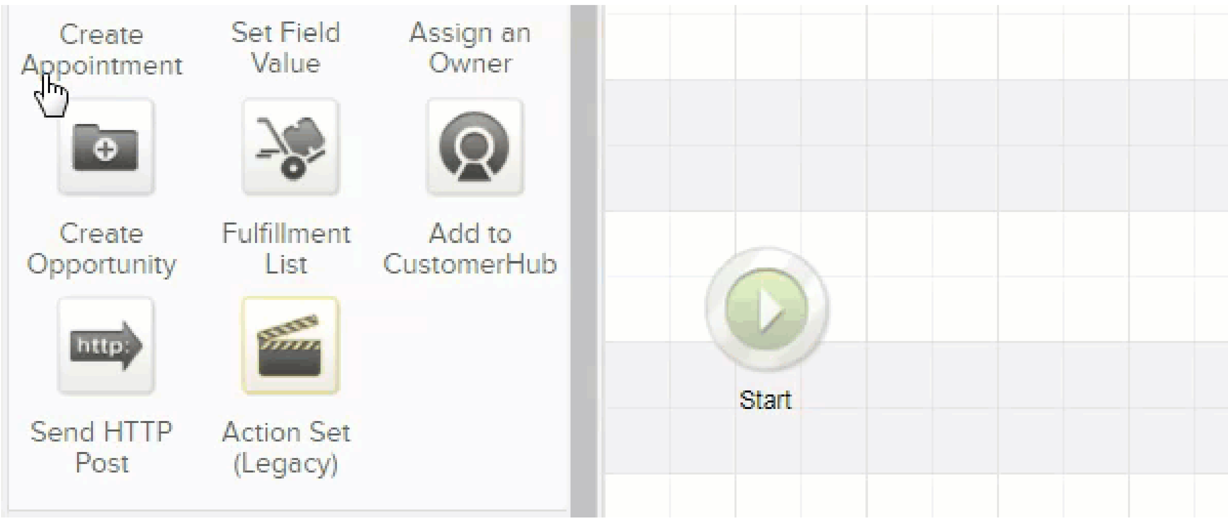
An HTTP Post is used to send information from Infusionsoft to a web page that runs a script (e.g., ASP, PHP, Javascript.) which extracts data from the URL and processes it on your web server.

Please Note! Only standard port numbers are supported. Supported ports are: **80** and **443**.

Each HTTP post object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. HTTP post objects are not archived. If you delete an HTTP Post object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.

2. Drag and drop a **Send HTTP Post** object onto the canvas.



3. Double-click on it to configure the post settings.

4. Enter the post URL. This is where the external web server script is hosted.

5. Click **Merge** to access the Infusionsoft fields you can post.
   Each line item of the HTTP Post will send 2 pieces of information to the URL: a field *name* and a field *value*.
   - Name: The field name can be defined by you. This flexibility allows you to use existing scripts and / or comply with external API standards. If there is no need to comply with external standards, you may use the default Infusionsoft field names for standard or custom fields.
   - Value: The value is the content of the field. For example, the standard field named "Email" might have the value "myemail@email.com." You must use an Infusionsoft merge field to designate the value to be pulled.

6. You can add multiple lines of Name / Value pairs.
   - Click the "plus" icon to add another pair
   - Click the "minus" icon to remove a pair

7. *Note: You cannot reorder the lines after they've been added. You can only delete and recreate them. Click on to remove a Name / Value line item.*

8. When you've finished adding Name / Value lines, click on the**Test** button to verify the post is working as expected.
   A "200" response code validates the post is working properly. Other response codes may require troubleshooting. A 409 error may mean that the user you selected already has a member record in CustomerHub. Try testing with a different user.

9. Click **Back to Sequence**

10. You are ready to publish your changes.

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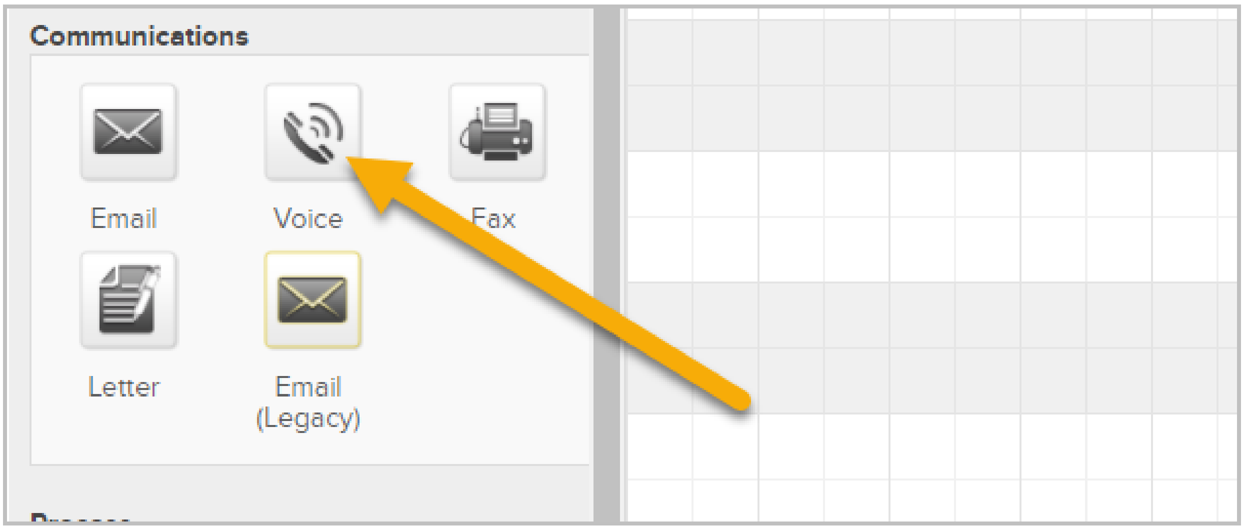
Campaign Sequence Voice Message

Last Modified on 07/23/2018 2:20 pm MST

You can incorporate automated voice communications in a campaign sequence. Infusionsoft will automatically dial the primary phone number on a contact record and deliver the voice communication. Automated voice communication is a powerful marketing tool. It adds the personal touch of human voice to your marketing mix. Voice communication is an especially powerful when it is used to welcome new customers or remind someone of an event.

1. Drag and drop a Voice onto the campaign canvas.



2. Double-click it to configure the settings.

3. Configure the voice communication
   - **Recording for a live person**: This message will play when a live person answers the phone.
   - **Recording for voicemail**: This message will play when the call goes to voicemail.
   - **Billing & Legal**: You will need to agree to the Infusionsoft Acceptable Use Policy before using voice communications. You will only need to do this once. The boxes will be pre-checked the next time you create a voice communication.

4. Click **Add Message** to record your message. Configure your Caller ID if prompted.

5. Name your message, enter your phone number and click **Call Me**. Follow the voice

prompts to record your message from your phone.

6. When your recording is completed successfully, you will notice the success message on the *Add Message* window.
7. Click **Save** and make sure your recording is selected in the drop down.
8. When you are finished with your recordings, change the status of this voice communication from *Draft* to *Ready* in the top right corner.
9. Click **Back to Sequence** and don't forget to publish your changes.

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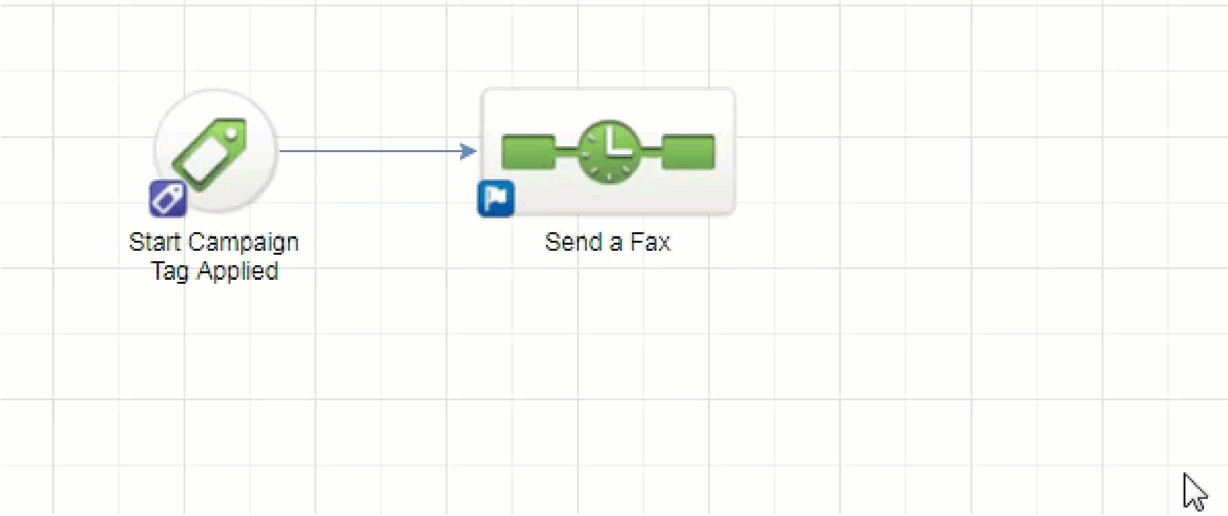
Campaign Sequence Fax

Last Modified on 07/23/2018 2:20 pm MST

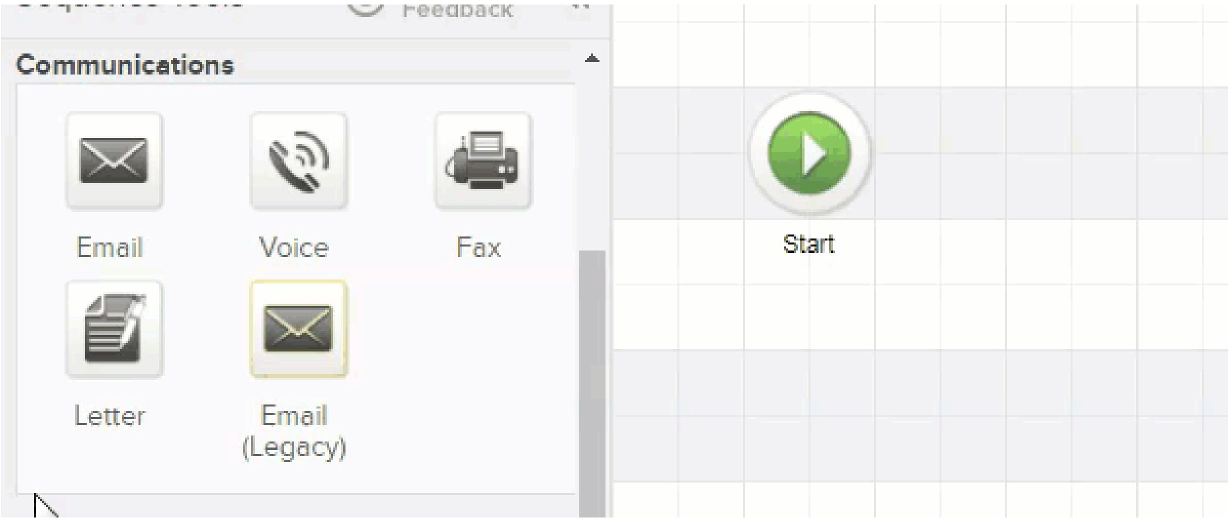
Follow the steps below to add a fax communication as part of a campaign sequence.

Important Note! Using a fax may cause extra charges. Please note that in the snippet the cost of using the Fax snippet will be displayed.

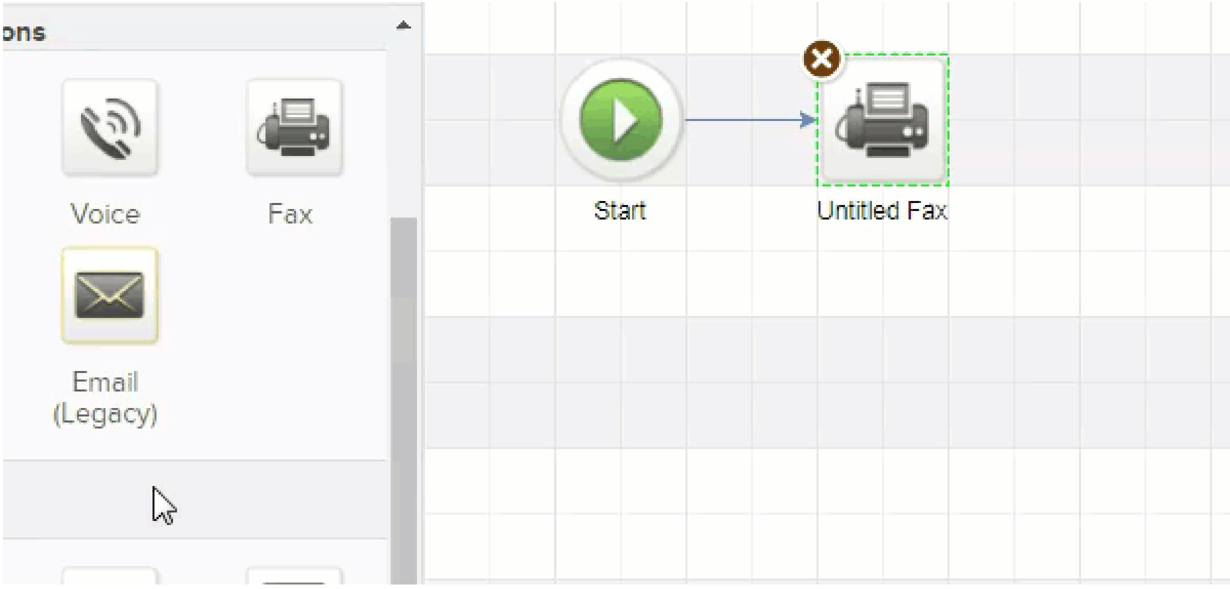
1. Double-click on campaign sequence to edit it or drag and drop a new campaign sequence onto the canvas



2. Drag a Fax communication snippet onto the canvas



3. Double-click the fax snippet to configure the settings



4. Upload the file(s) to send out as a fax

   Please Note: Merge fields are not available for fax communications!

5. Read the Billing & Legal information and check the boxes, if agreeable
6. (Optional) Send a test to a user in the system
7. When complete change the status from Draft to Ready
8. Click **Back to Campaign** and publish your changes

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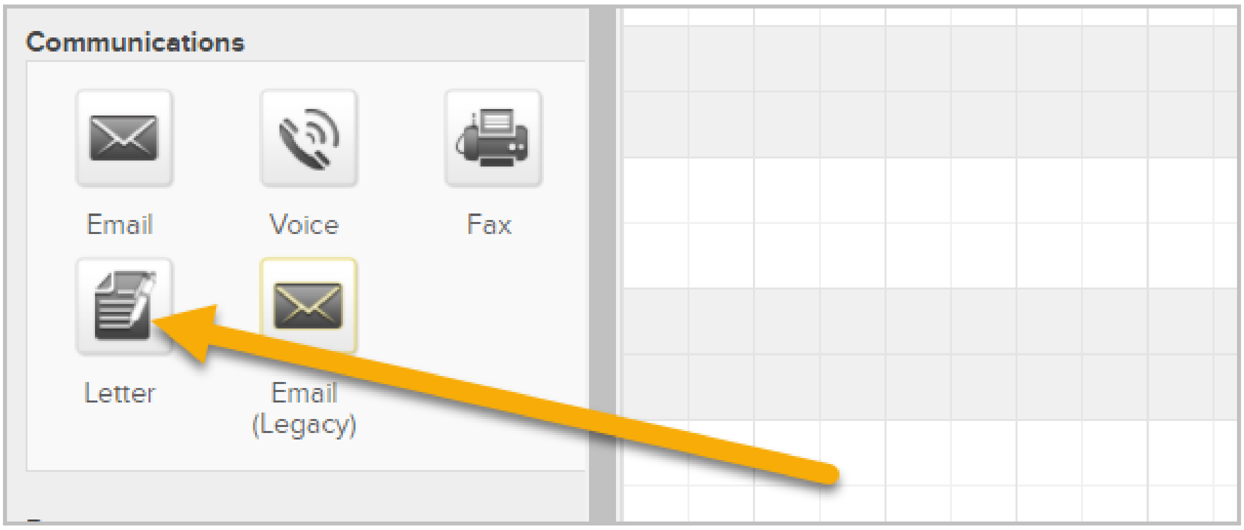
Campaign Sequence Letter

Last Modified on 07/23/2018 2:20 pm MST

You can automatically queue a job to create a letter document in a campaign sequence. This allows you to incorporate direct mail into your marketing mix. When a letter template is triggered through the sequence, the system will queue up a letter fulfillment job on the home page dashboard of the user. The user then prints the letters and prepares them for mailing.

1. Drag the Letter Communication process snippet onto the canvas



2. Double-click it to configure the settings.

3. (Optional) You can copy a letter you have already created in an existing campaign. You can also preview, rename or revert changes from this drop down.

4. Choose the person who will be responsible for processing the letter. You may also send that user an email notification when a new letter job is ready to be completed.

5. Design your letter communication using the design menu and letter snippets.

6. When you are finished editing your letter, change the status from Draft to **Ready**.

7. Click **Back to Sequence** and don't forget to publish your changes.

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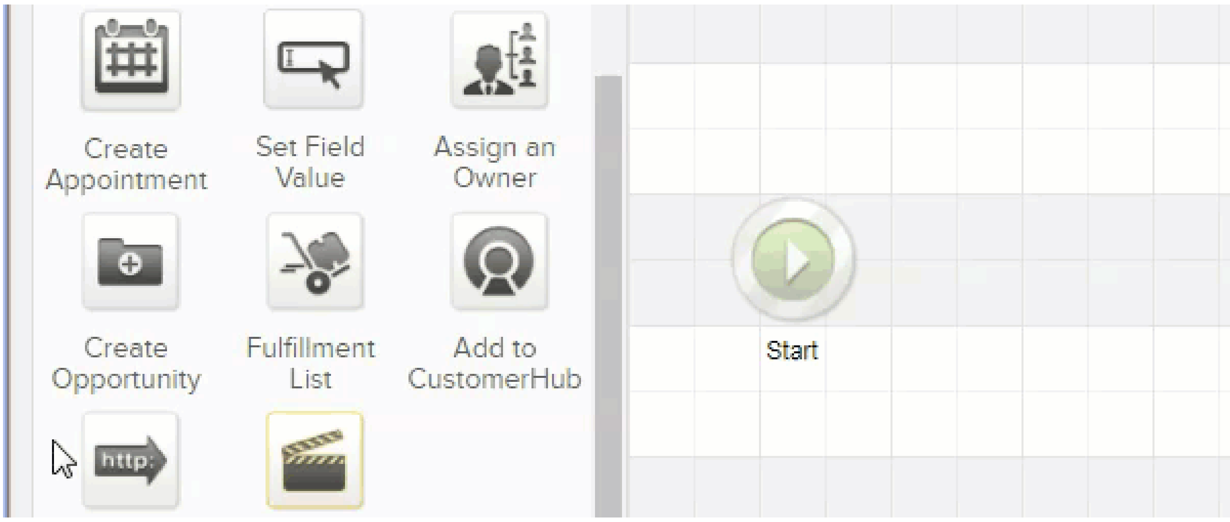
Campaign Sequence Fulfillment List

Last Modified on 07/23/2018 2:21 pm MST

A fulfillment list can either be delivered to a user's dashboard or sent to their email address. A fulfillment list is a spreadsheet containing contact information and can include an attachment. Sending to an email address is useful if you use a third-party fulfillment company. You can also queue jobs to only send when *X* amount are ready to be fulfilled.

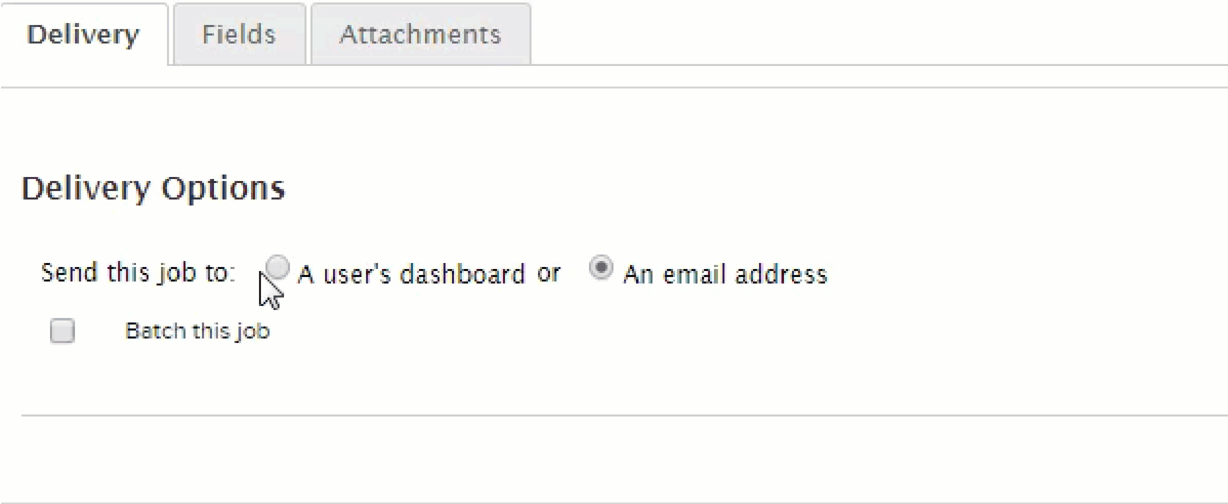
1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.

2. Drag and drop a **Fulfillment List** object onto the canvas.



3. Double-click the Fulfillment List icon to configure it.

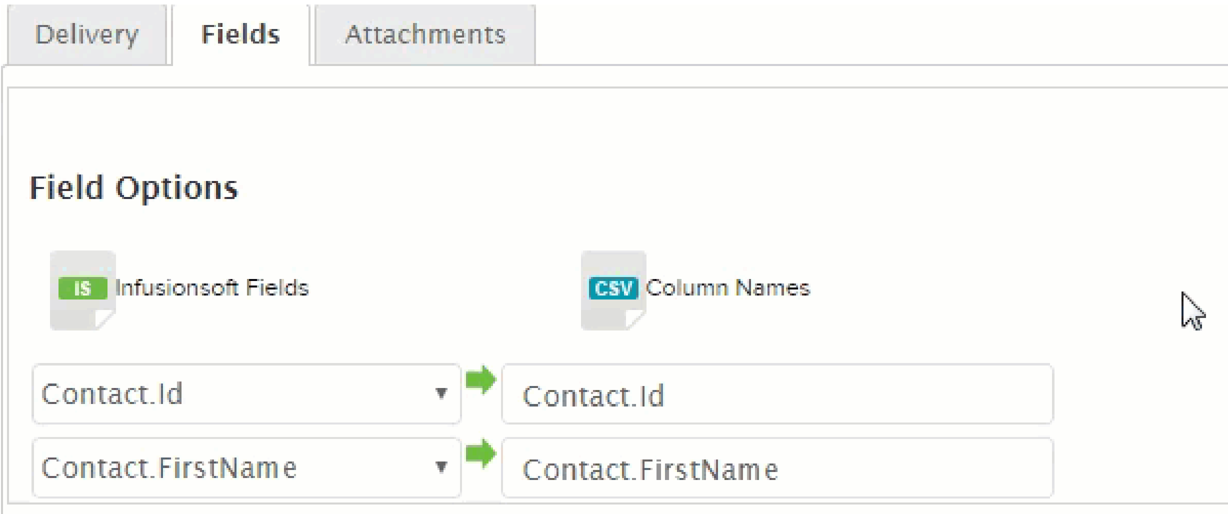
4. Delivery: There are two ways to deliver a fulfillment list: A user's dashboard and an email address.



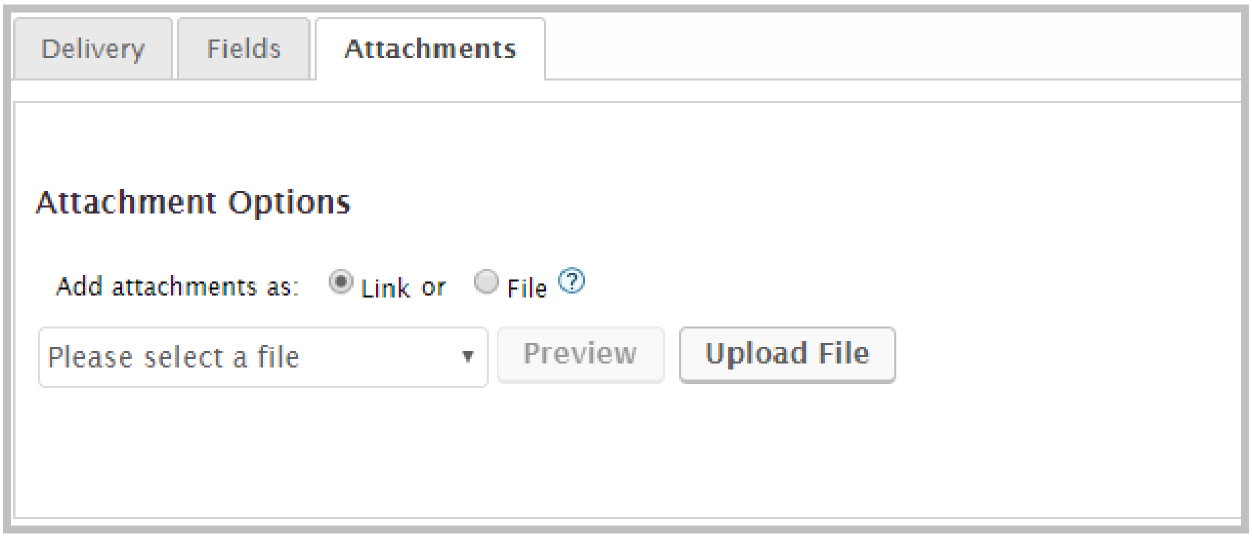
- **A User's dashboard:** When you choose to send the fulfillment to a User's dashboard, you will see a couple of configurable Dashboard Options. This delivery option will send the fulfillment list to a user's dashboard. This delivery option is typically designed for companies that do their own fulfillment, or want to check over the spreadsheet before sending it to external fulfillment. The user will see the fulfillment job on their dashboard, click to open it, and then mark the fulfillment as complete when they are done.
  - **Assign To** - Choose the Infusionsoft User that will be responsible for fulfilling. The user will receive a job on his or her dashboard when something is ready to be fulfilled.
  - **Instructions** - Add a text blurb that will appear on the job description in the user's dashboard.
    (Optional, but recommended) Send an email notification - This will send an email notification to the user when there is something ready to be fulfilled. The user will then look at their Infusionsoft dashboard to process the fulfillment job.
- **An Email Address:** When you choose to send the fulfillment to an email address, the fulfillment is automatically attached to the email (.csv file type) and then sent to the recipient. This delivery option will send an email with the fulfillment list attached. If you use an external fulfillment company, this will allow you to automate your fulfillment process.
  - **From:** Choose from whom the email will be sent from
  - **To:** Choose to whom the email will be sent. You will most likely be choosing the Other option if you are sending the email directly to an external fulfillment company. You could also send the email to yourself or another user to check over before forwarding to the fulfillment house.
  - **Subject:** This is the subject line of the email. It is best-practice to include your company's name or initials and a short job description (e.g. RDFP Mailing Job: New Customer Welcome Gift.)

- **Body:** Add any instructions that the fulfillment company will need in the body of the email.

5. Fields: In this section, you will choose which contact record fields you want to add to the fulfillment list. The left-hand column titled, Infusionsoft Fields, represents all the available fields you can choose from. The right-hand column represents the fields that will actually be present on the spreadsheet the recipient receives. To add or remove fields, just click the **+** or **-** next to a field on the right-hand side.



6. Attachments: Attachments are optional. Select or upload any additional documents needed to process the mailing. Click the "+" button to add multiple documents.



7. Test & Publish. When you are finished configuring your fulfillment list, click the **Send Test** button and select a user from the drop-down.

8. When finished, change the status from Draft to **Publish**, click back to your sequence

9. You can now publish your changes.

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Manually Start Or Stop A Campaign Sequence

Last Modified on 07/23/2018 2:22 pm MST

In most cases, campaign sequences start and stop automatically as contacts complete campaign goals and move through the strategic process you designed. If you find yourself manually starting sequences regularly, then you may need to add a goal type that automates that campaign transition. It may be better to create a goal that uses a note, tag, or opportunity stage move (which are all controlled by you.)

Contacts may ask you to stop a sequence in a way that the system cannot automate (e.g. phone call, email reply, or in person.) If this happens, you need to manually stop the sequence for that contact.

Pro Tip! If you expect to start or stop sequences manually, make sure that a tag is applied at the start of each campaign sequence and removed at the start of the next sequence in the campaign path. This will ensure you are able to search for contacts based on their active sequences.

Stopping a Sequence

- When you stop a sequence, the contact is removed from it.
- The contact will not proceed further down that particular path of the campaign.
- The contact will continue to receive other sequence messages, if they are in more than one sequence.
- To remove a contact from all campaign processes, you must stop each individual sequence.
- If, in the future, a contact interacts with you in a way that satisfies a campaign goal (e.g. fills out a web form), they will begin the related sequences again.

Starting a Sequence

- When you start a sequence, the contact starts at the very beginning of the sequence, even if they have previously received some or all of the sequence communications.
- If the contact is already in the sequence, starting it manually does not reset the

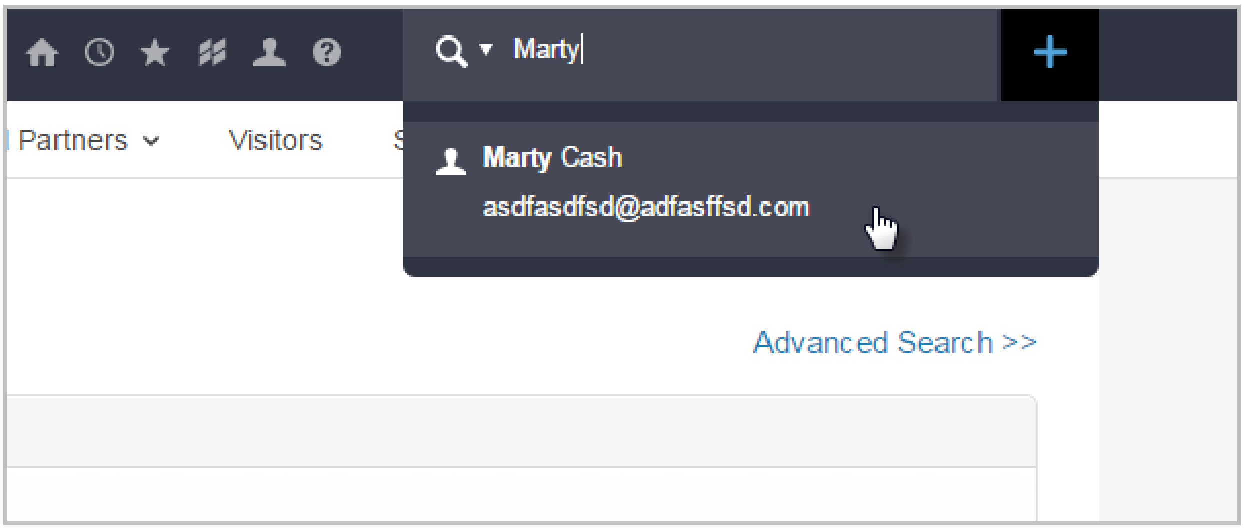
sequences. The contact *will not* go back to the beginning, they will continue receiving communications sequentially.

- If you want a contact to restart the sequence, you must first stop the sequence, and then start it again.

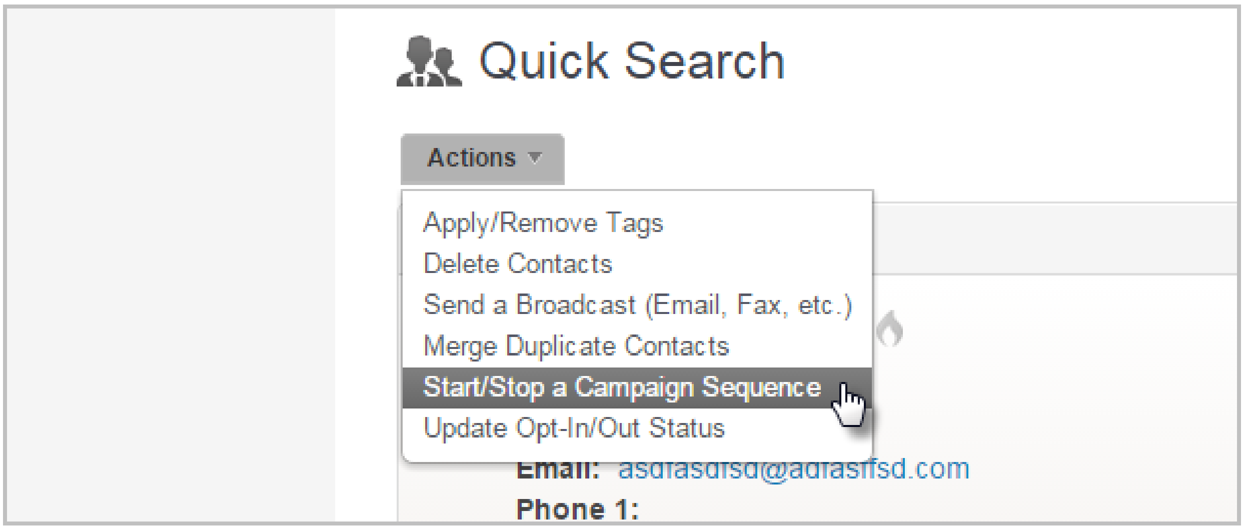
Manually Managing a Sequence Step

You can also resend or cancel an individual campaign sequence step.

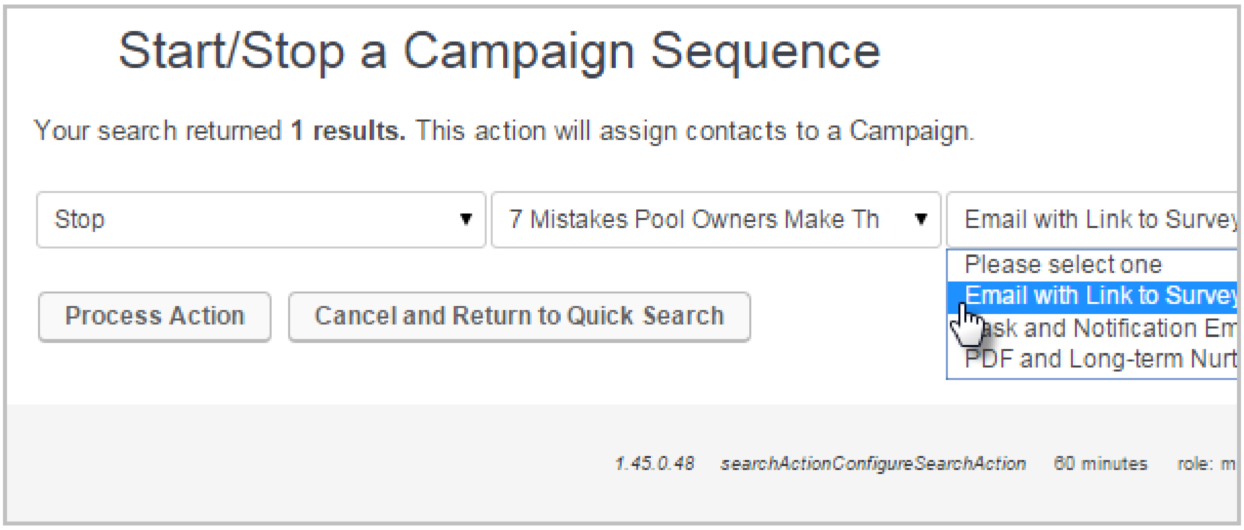
1. Search for the contact in the Quick Search



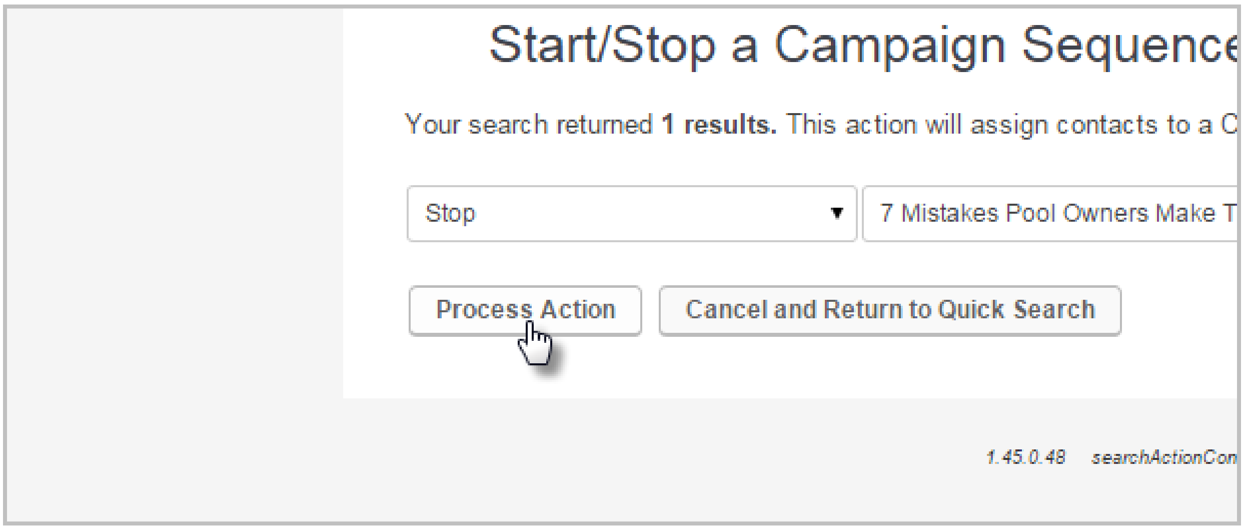
2. Click the **Actions** button and select **Start/Stop a Campaign Sequence**



3. Select the action type (**Start or Stop**), select a the **Campaign**, then the **Sequence**



4. Click on the **Process Action** button



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Make Sure Contacts Always Complete A Sequence

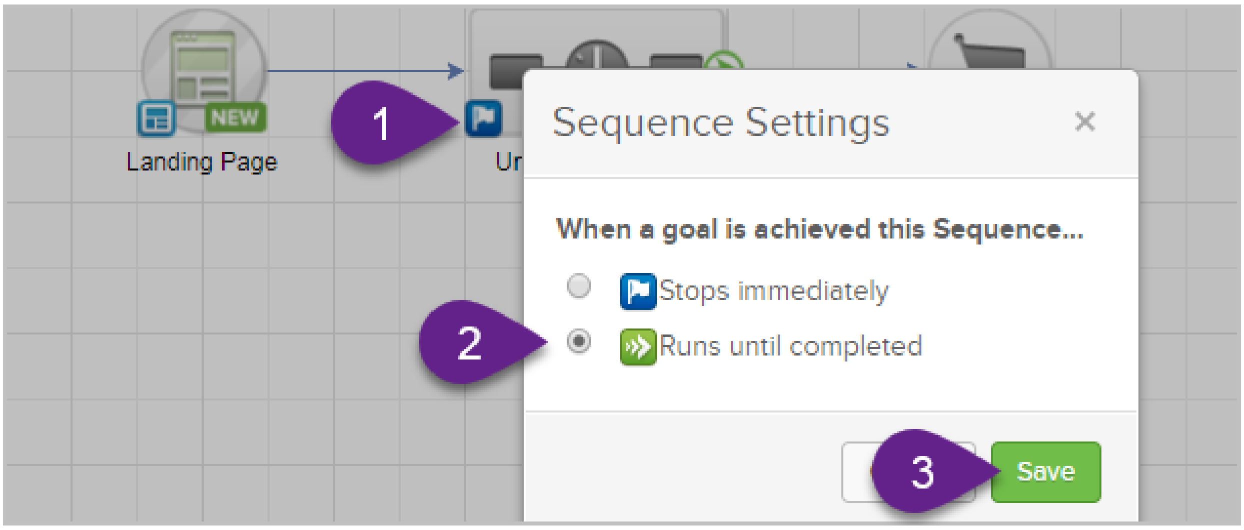
Last Modified on 07/23/2018 2:22 pm MST

The sequences you add to a campaign are set to stop immediately when one of the campaign goals connected to the right of it is completed. The contact does not receive any of the remaining email messages and the remaining work flow processes will not happen. This makes sense when the remaining messages in the sequence are no longer relevant.

There are times you may use a sequence to deliver a series of educational messages. In this case, it makes sense to deliver all of the messages because they contain valuable information that the contact has requested. These messages are generally less promotional, and more educational. You may also use a campaign sequence to schedule internal tasks which must be completed even if the contact responds to a subsequent goal.

In these cases, you would want to edit the sequence settings so that the sequence will run until complete.

1. Click on the flag icon on a campaign sequence to edit the sequence settings.
2. Select **Runs until completed**
3. Click **Save** to apply the update. Don't forget to publish your changes.



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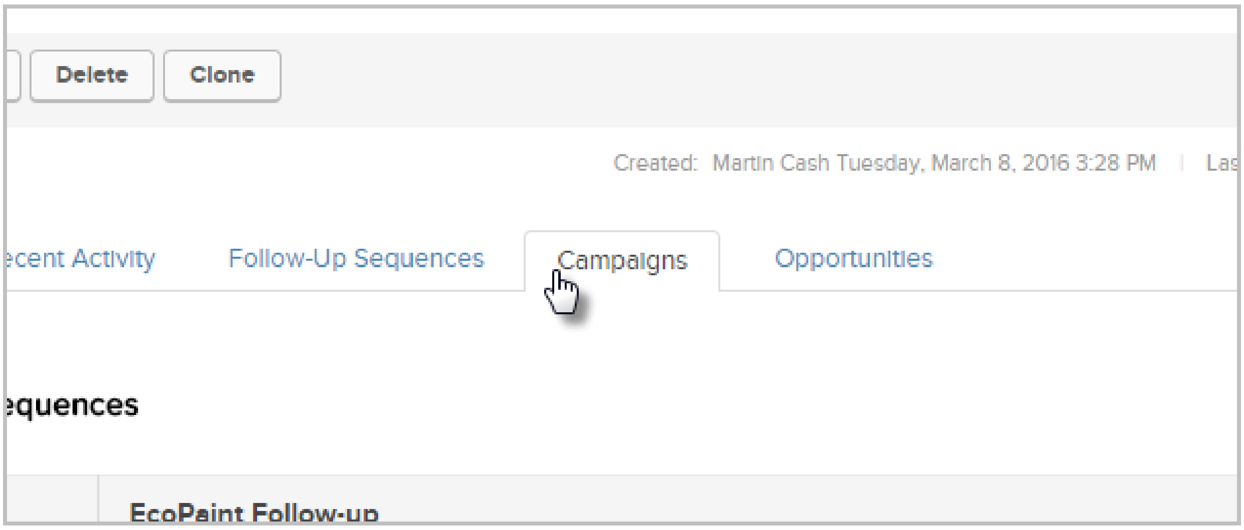
Resend A Campaign Email To Someone

Last Modified on 07/23/2018 2:22 pm MST

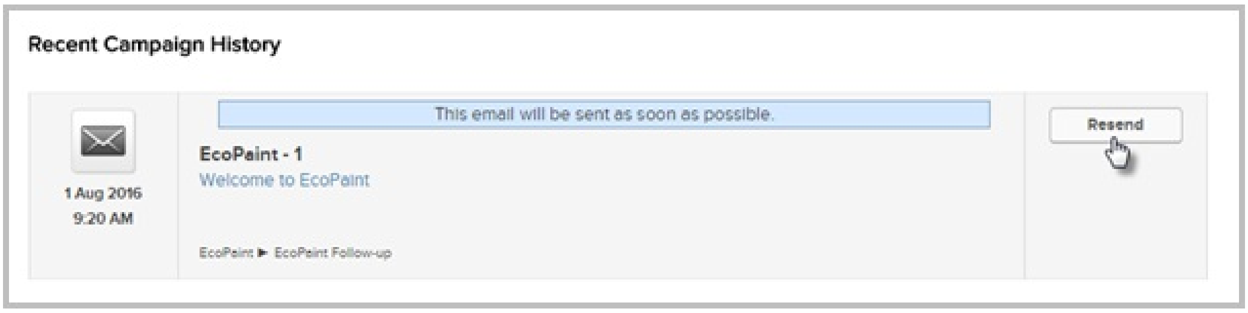
If a contact needs a campaign sequence email resent to them, follow the instructions below

1. Find and open the contact record that you would like to resend the email to.

2. Scroll down and click on the **Campaigns** tab.



3. Click the **Resend** button next to the email.



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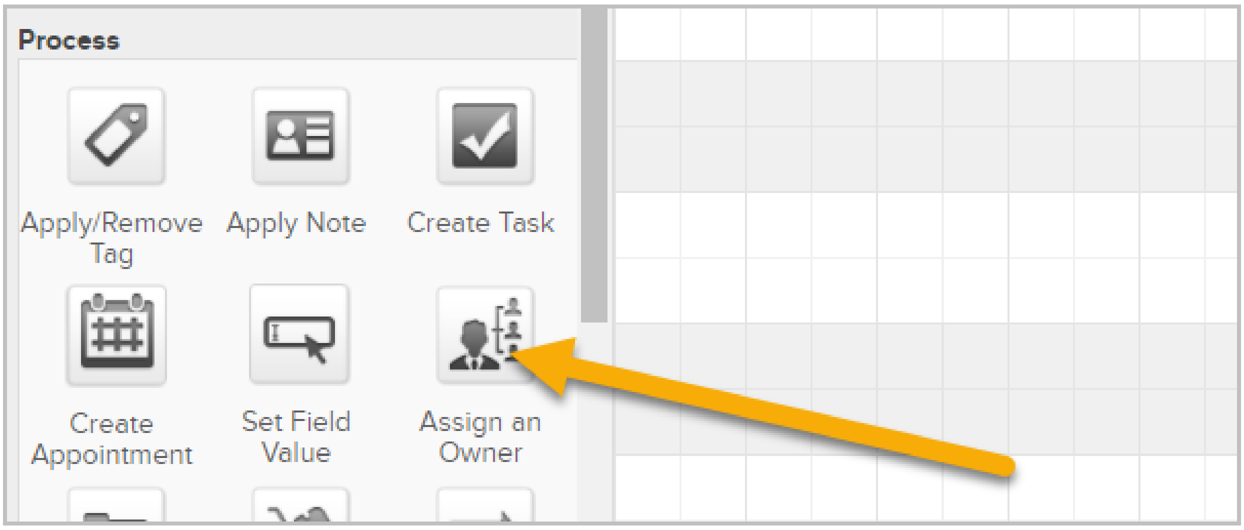
Automatically Assign An Owner To A Contact In A Campaign

Last Modified on 07/23/2018 2:21 pm MST

The **Assign an Owner** process snippet allows you to assign or reassign the owner of a contact record as a step in a campaign sequence.

1. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.



2. Drag and drop an **Assign an Owner** process snippet onto the canvas.

3. Double-click it to configure the settings.

4. To configure owner assignment...
   - **Assign to User**: This option allows you assign the contact record to a specific user in your Infusionsoft application.
   - **Assign using Round Robin**: A round robin is a set of distribution rules based on numeric logic. Round robins are created outside of the campaign builder (**CRM>Settings>Round Robins.**)

5. Click **Save.**

6. You are now ready to publish your changes.

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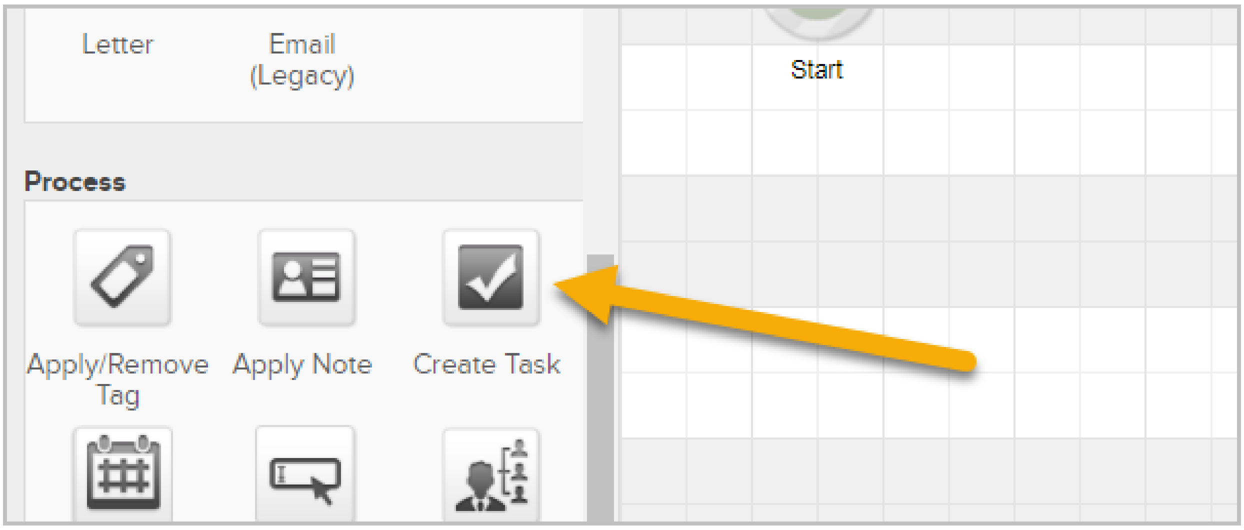
Automatically Create a Task in a Sequence

Last Modified on 10/03/2018 2:49 pm MST

The task object assigns a manual follow-up responsibility to an Infusionsoft user. The tasks are generally related to predictable events, like a welcome call after a new customer purchases or 30 day phone survey. After a task is assigned, the user is responsible for manually updating it and adding a completion date.

Remember! Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Drag and drop a **Create Task** object onto the canvas.



2. Double-click it and select a **task type** from the drop-down.

3. Enter the **task title** and **body**. The title is displayed on the user's task list. The body information provides additional details when the user clicks on the title to view the task details. The body might contain instructions, a script, or a list of "to do" items related to

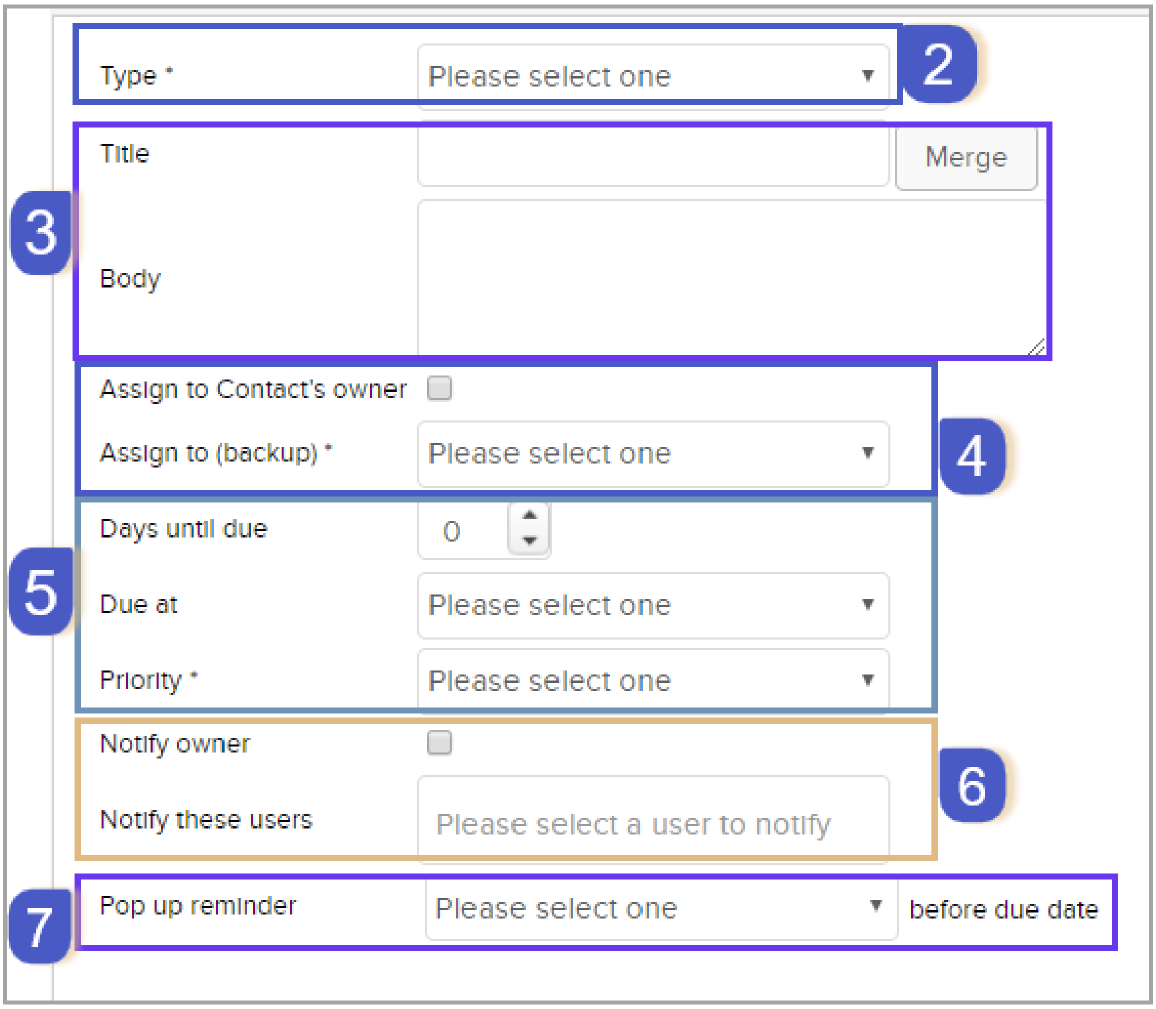
this task.

4. **Assign the task:**
    - **Assign to Contact's owner**: Check the box if you want the user who is the assigned owner of the contact record to complete this task (e.g. sales rep.)
    - **Assign to (backup)**: Select a backup user from the drop-down. This setting assigns a specific user to complete this task or assigns it to this user if no owner has been assigned to a contact.

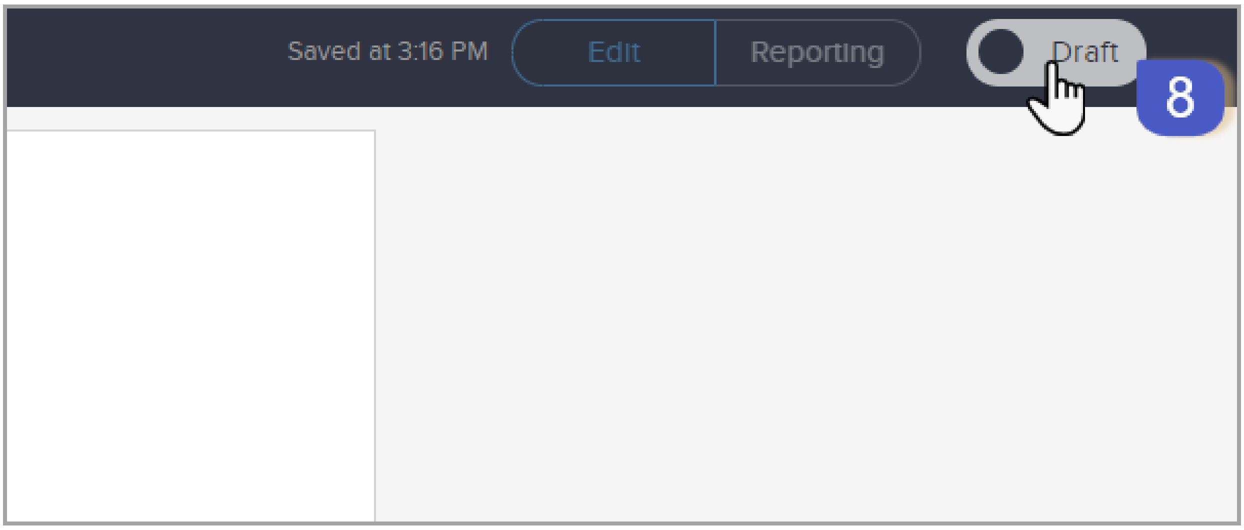
5. Set a **due date**, **time**, and **priority**. The due date is different from the assign date. The task is created and assigned based on the sequence timer before it in the sequence. The due date is used to determine whether the task has been completed on time or is overdue. Priority is used to set the urgency level of the task.

6. **Notify** (Optional)**:** Set up email notifications, check the box to have a notification sent to the Owner and/or type a user name into the search box and click on a name to select a user. Repeat the process to add more user notifications. Every time the sequence creates a task, these users will receive an email.

7. **Pop up reminder** (Optional): A browser pop-up will be triggered to remind the owner and users of the tasks approaching due date.



8. Click **The Draft** to **Ready** slider to set the task to **Ready**.



9. You are now ready to publish your changes.

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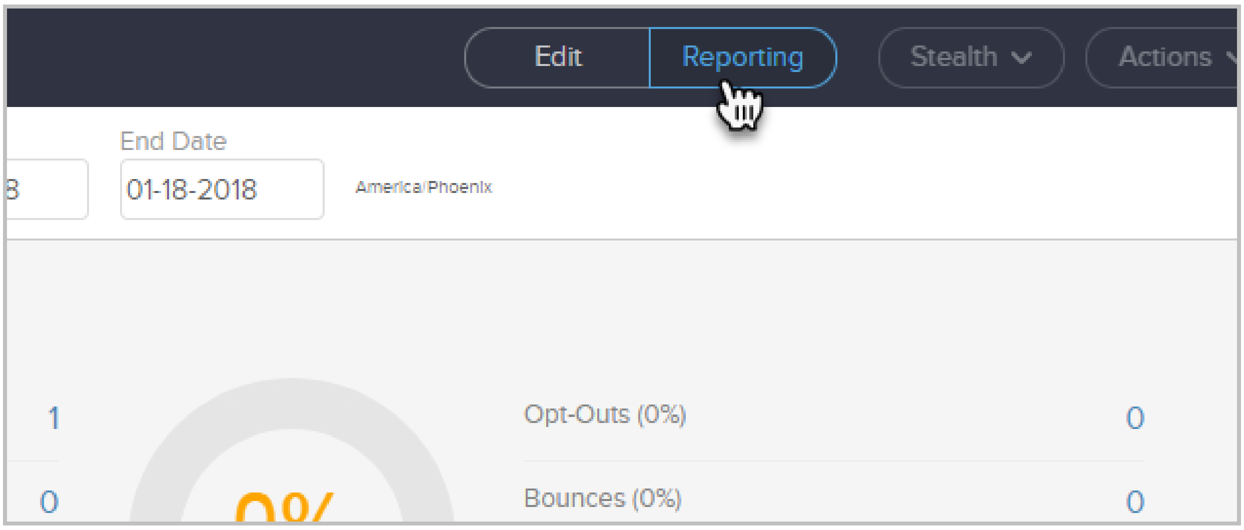
Campaign Performance Reporting

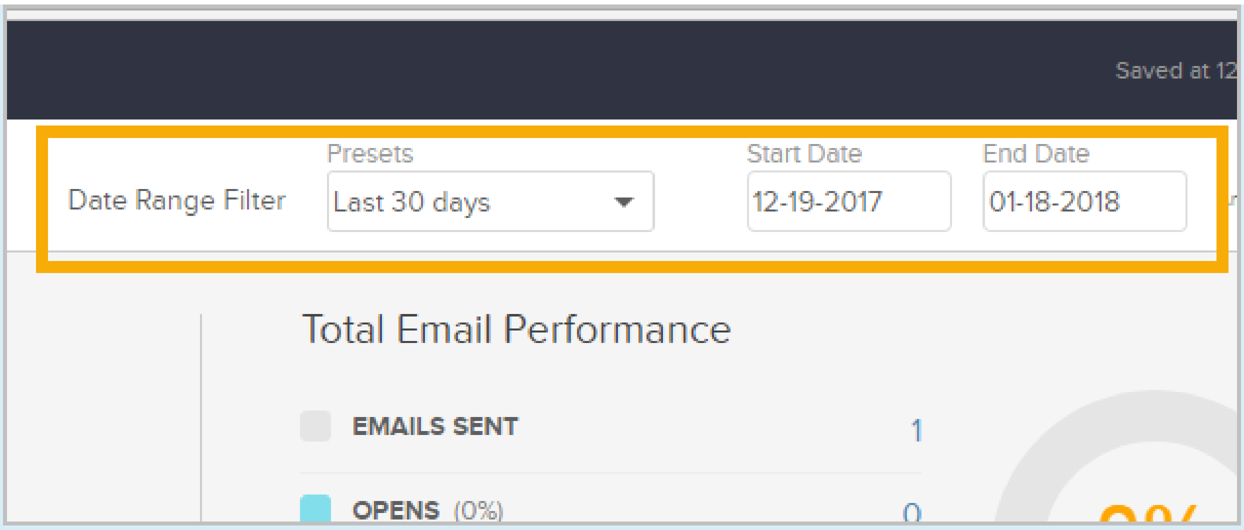
Last Modified on 07/23/2018 2:24 pm MST

After publishing a campaign, you will have access to performance reporting. Performance Reporting allows you to evaluate the effectiveness of your campaign within the Campaign Builder. It allows you to view the performance of your campaign at a "macro" level and then dig into specific marketing pieces (such as emails) in order to see how well they are performing.

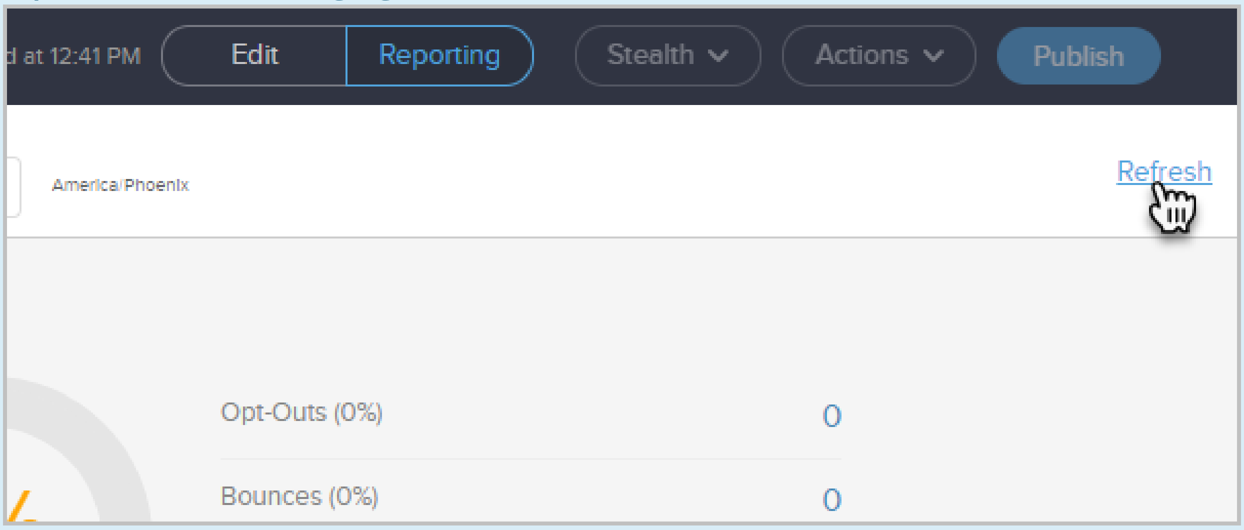
1. Click the **Performance** tab within a campaign



2. You can choose a default date range from the drop-down or enter a custom date range.

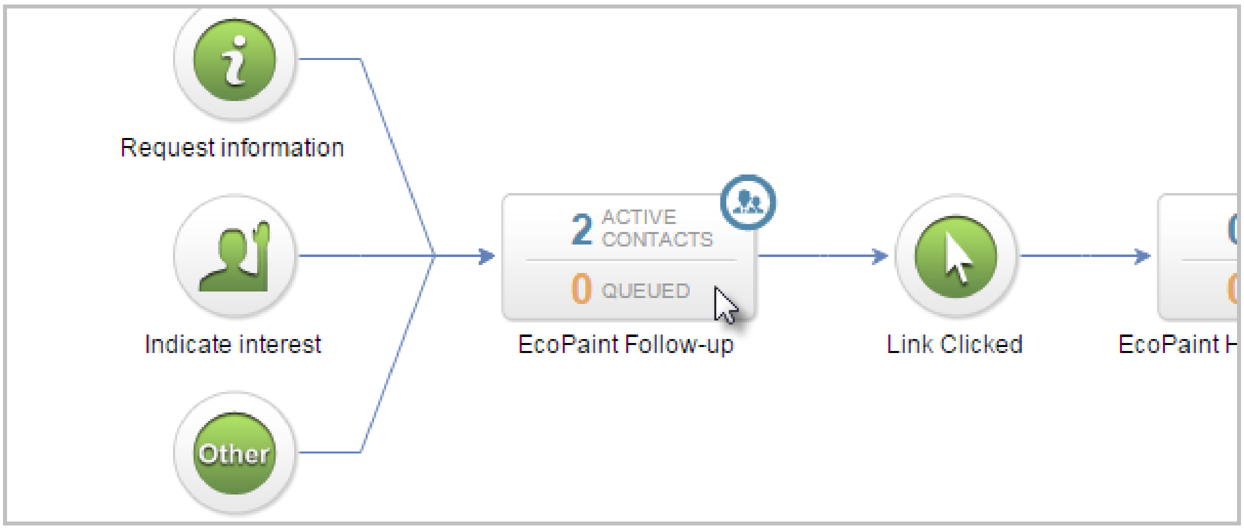


Important!: After changing dates, be sure to hit the **Refresh** link!

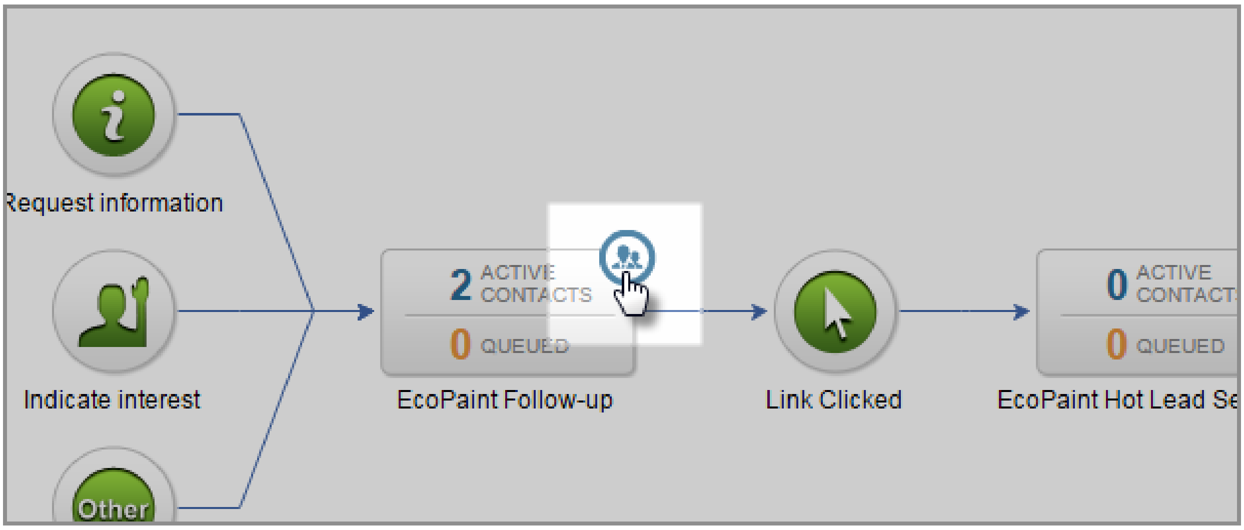


3. Active vs Queued Contacts. The blue number represents active contacts. A contact is considered "active" if they are currently being actively being marketed to in the campaign sequence. An active contact has not yet received all of the emails in a campaign sequence.

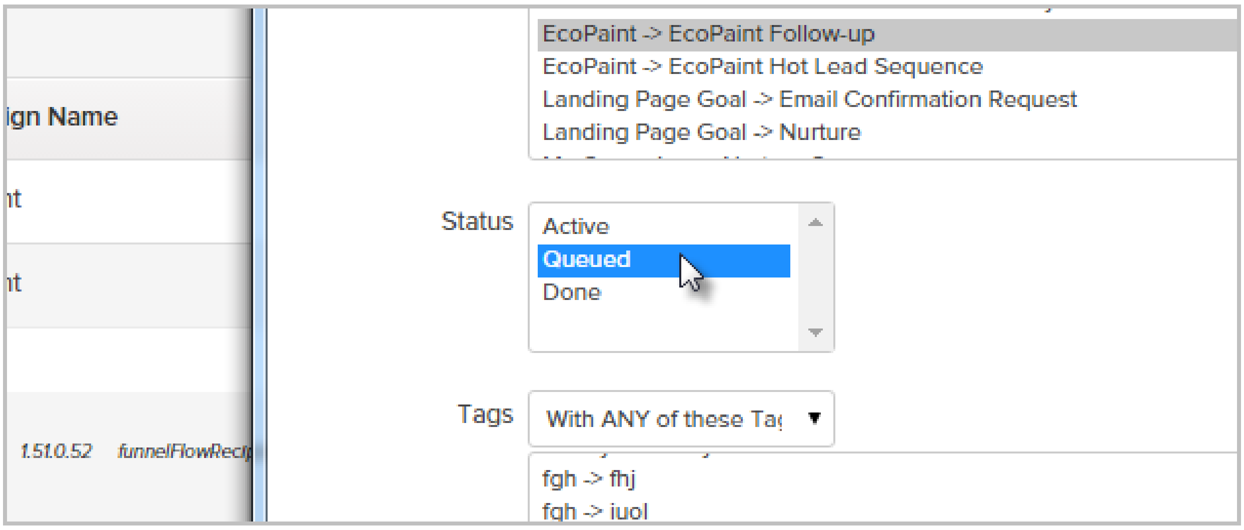
   The orange numbers represent "queued" contacts. A queued contact has received all the emails in a sequence and is no longer waiting for further content. In the example below, there are 2 active contacts currently being marketed to in the *EcoPaint Follow-up* sequence.



Note that when you hover over a sequence, a person icon appears. Click on this icon to view a list of all the active contacts in this sequence.

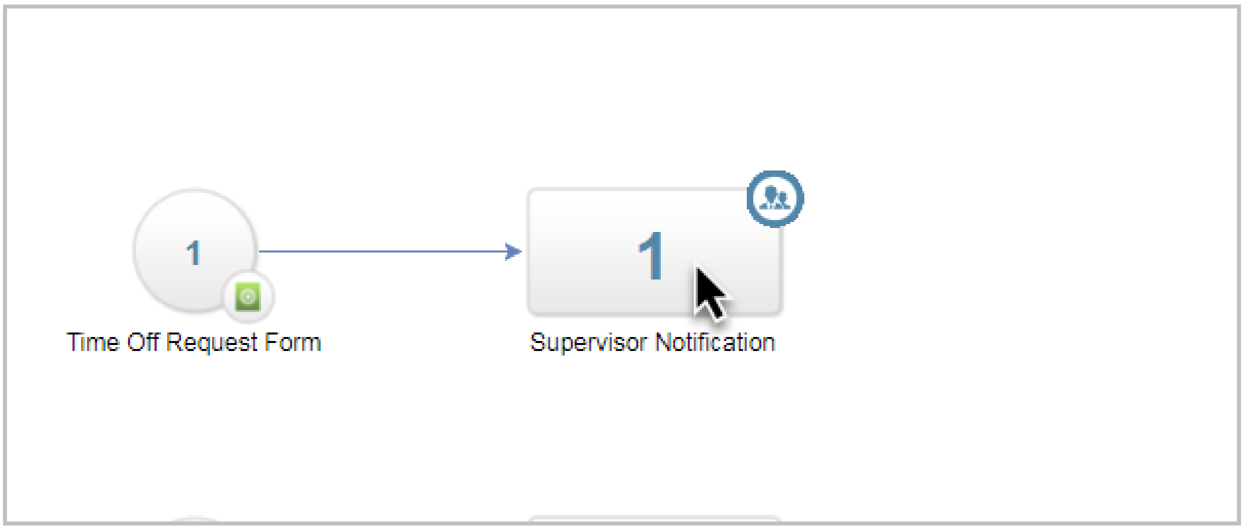


To view the queued contacts, simply change the filter to only see "queued" contacts by clicking on the **Edit Criteria/Columns** button and changing the status to *queued*.

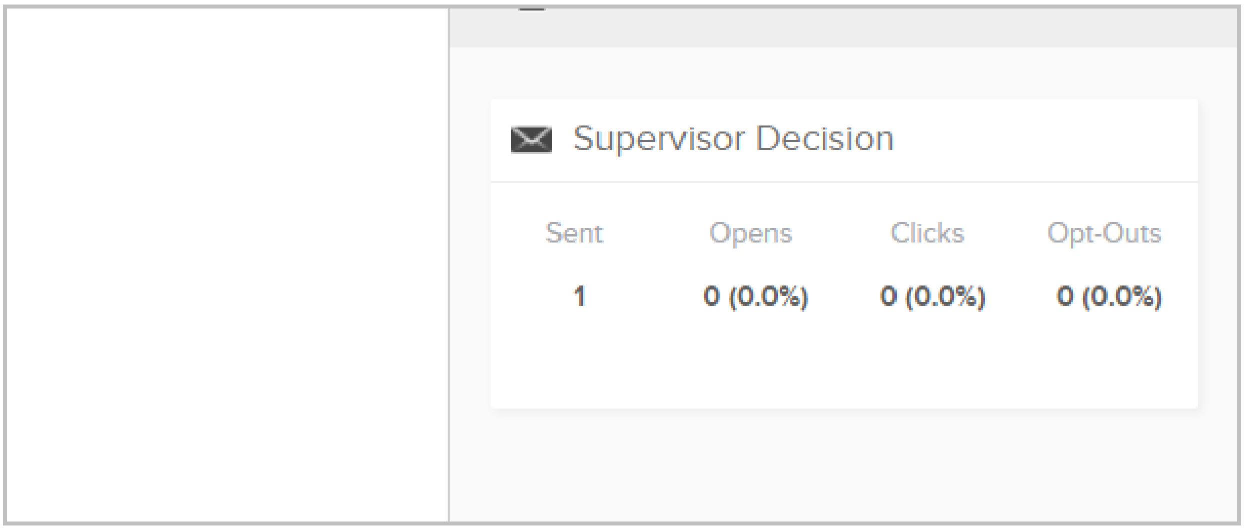


Pro-Tip! Keep in mind that when viewing contacts in a campaign sequence, the report will always default to showing the "active" contacts first, unless you manually specify "queued".

4. Campaign Performance Reporting. Double-click any sequence in your campaign to view more details



Each email in this sequence is represented by a card on the right side of the page. We can quickly see the open rate, click through rate and opt-outs for each email in this sequence. This information can help us determine which emails are working well and which emails may need to be improved.



Each card's title matches the name of the email in the sequence. In the example above, the title of the email is "EcoPaint - Intro"

Pro-Tip! If you click on a card, it will highlight where in the sequence the email lives. And vice versa, click on an email and it will highlight the card. This makes it easy to find the information you are looking for in order to make informed marketing decisions.

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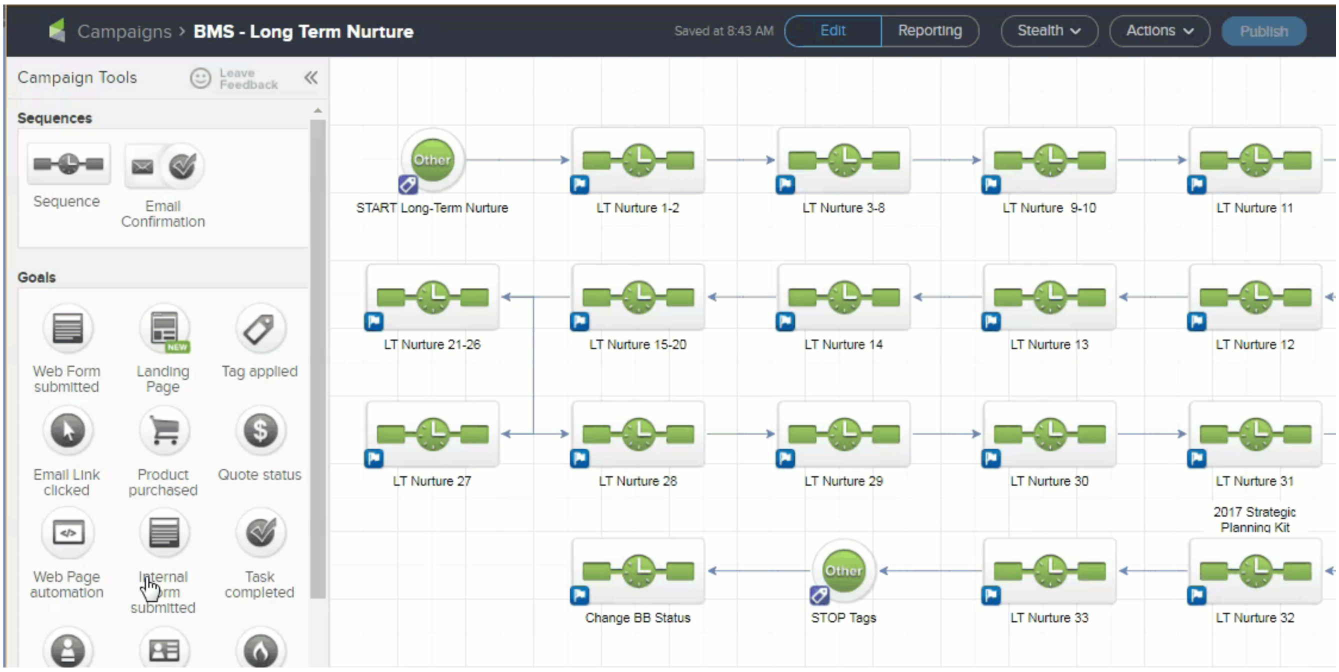
Campaign Email Performance Visibility And Date Range Selector

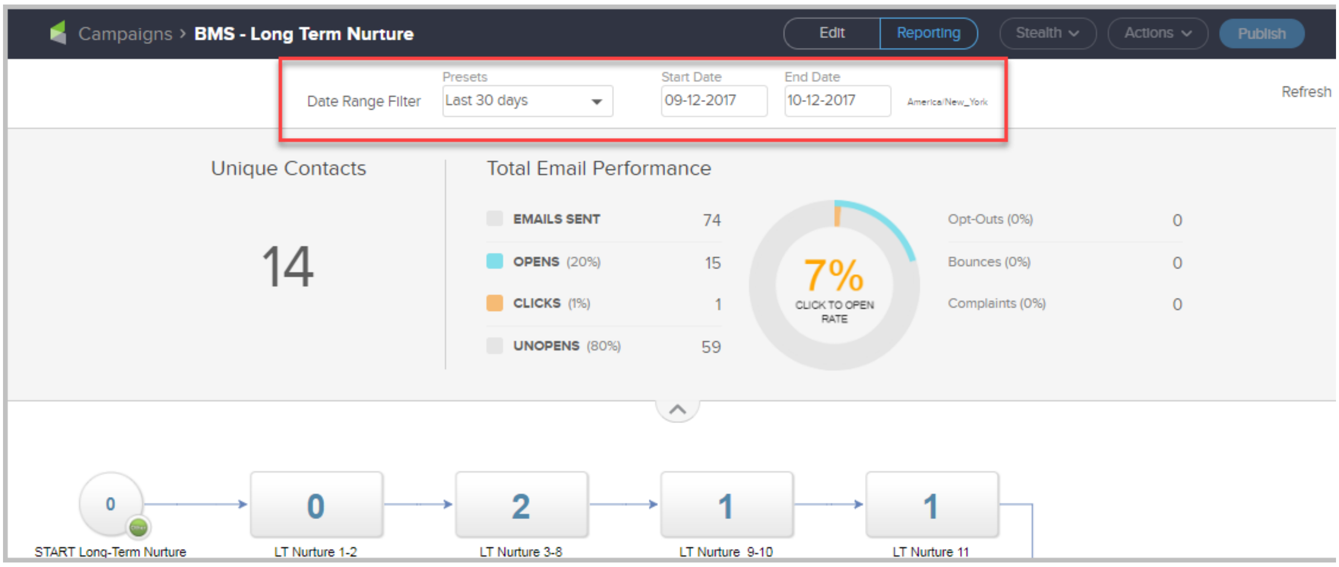
Last Modified on 07/23/2018 2:24 pm MST

Infusionsoft provides the ability to view your campaign email performance from within your campaigns. You will have the ability to customize your date range, to view past email performance (opens, clicks, opt-outs, bounces, etc.), all from the **reporting** tab in the campaign builder.

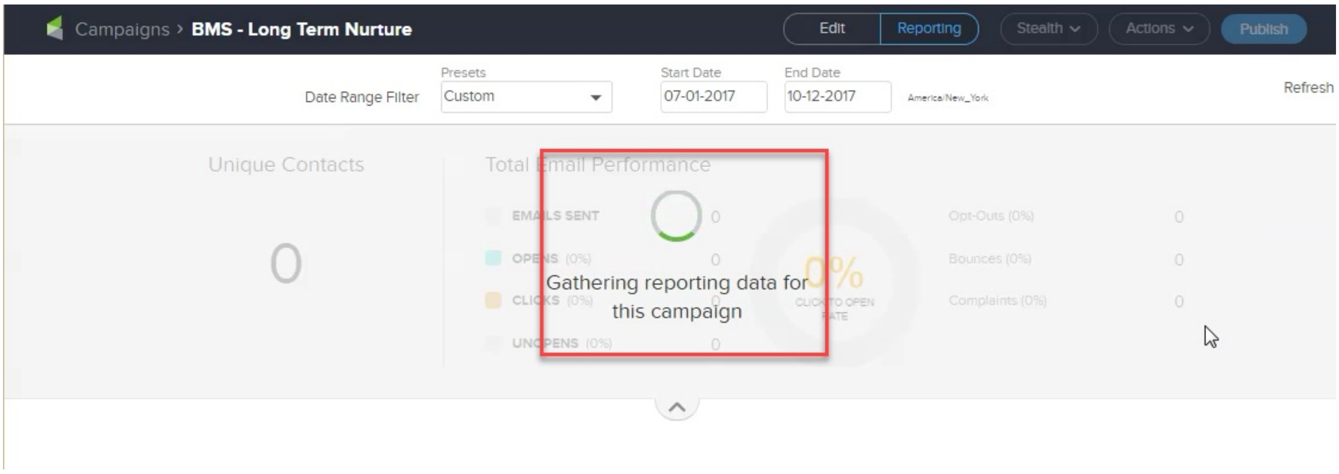
1. Navigate to the 'Reporting' tab within the campaign builder



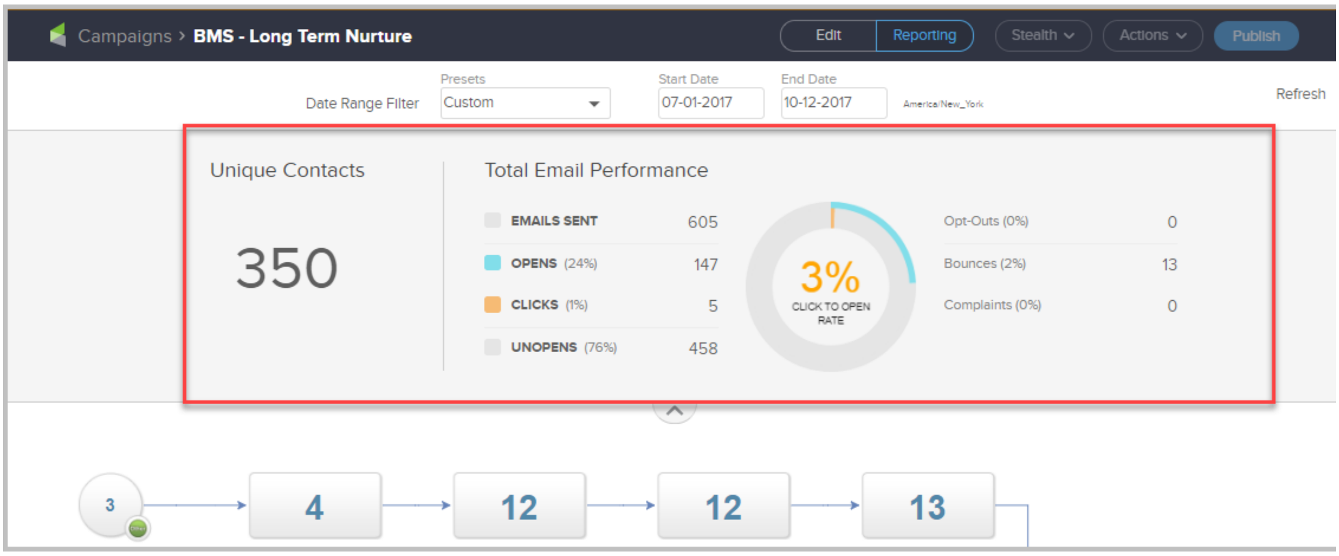
2. Choose from the list of preset date ranges, or choose a date range



Depending on how large the date range is, users may see a loading screen as the data is being pulled



3. Once the data loads, you are able to see email opens, clicks, opt-outs, bounces, etc. This gives you the ability to observe email performance for the campaign



4. (Optional) Click the Email Performance numbers to navigate to the corresponding marketing report for more in-depth reporting

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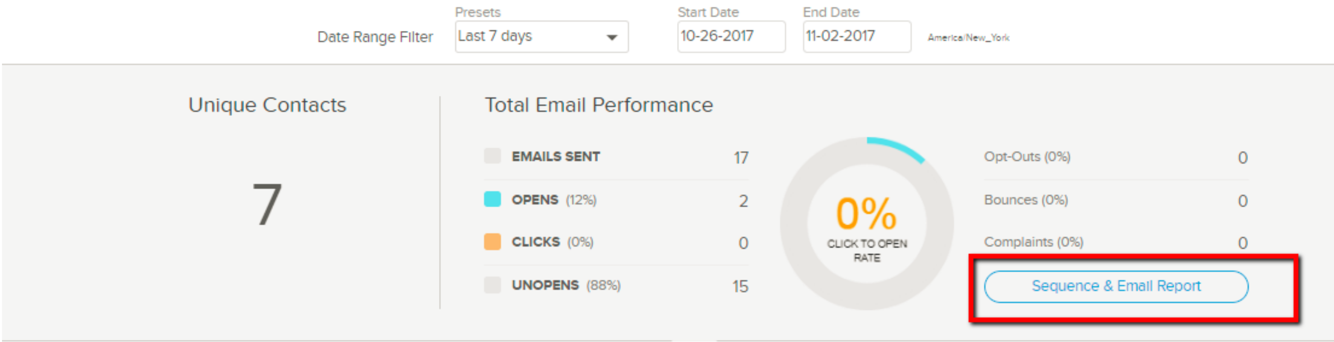
Campaign Full Sequence And Email Summary Report

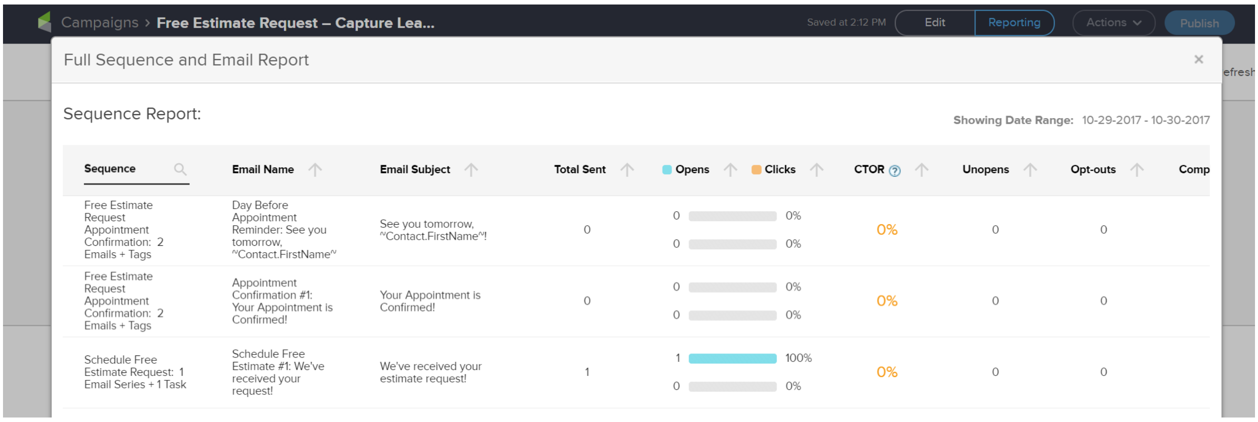
Last Modified on 07/23/2018 2:24 pm MST

Infusionsoft has the ability for you to view campaign email statistics, at a glance, from within the campaign builder's reporting tab.

1. Navigate to Marketing>Campaign Builder and click on the name of a campaign that contains emails
2. Click on the 'Reporting' tab, from within the campaign builder, and select a preset or custom date range to report on
3. Click on the Sequence & Email Report button, located at the bottom right of the Total Email Performance stats



1. Clicking the Sequence & Email Report button will display a summary report for all sequences that contain email(s). All Sequences containing an email will be listed and a report that shows the open and click % for each email.



2. Opt-out, Un-open counts and other useful metrics are available

4. (Optional) Click the Email Performance numbers to navigate to the corresponding marketing report for more in-depth reporting

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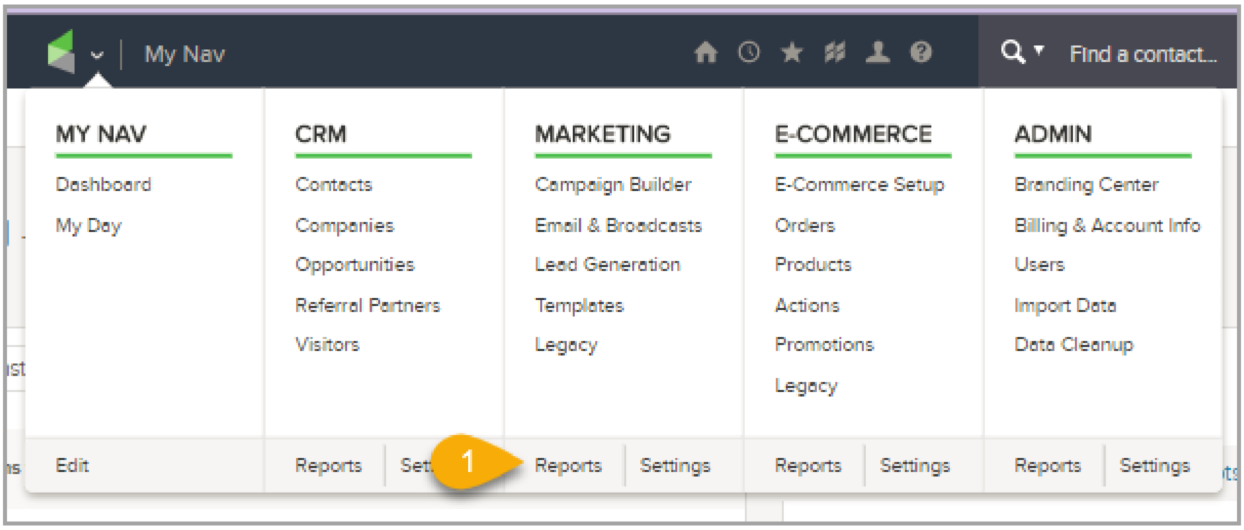
Web Form Tracking Report

Last Modified on 07/23/2018 2:25 pm MST

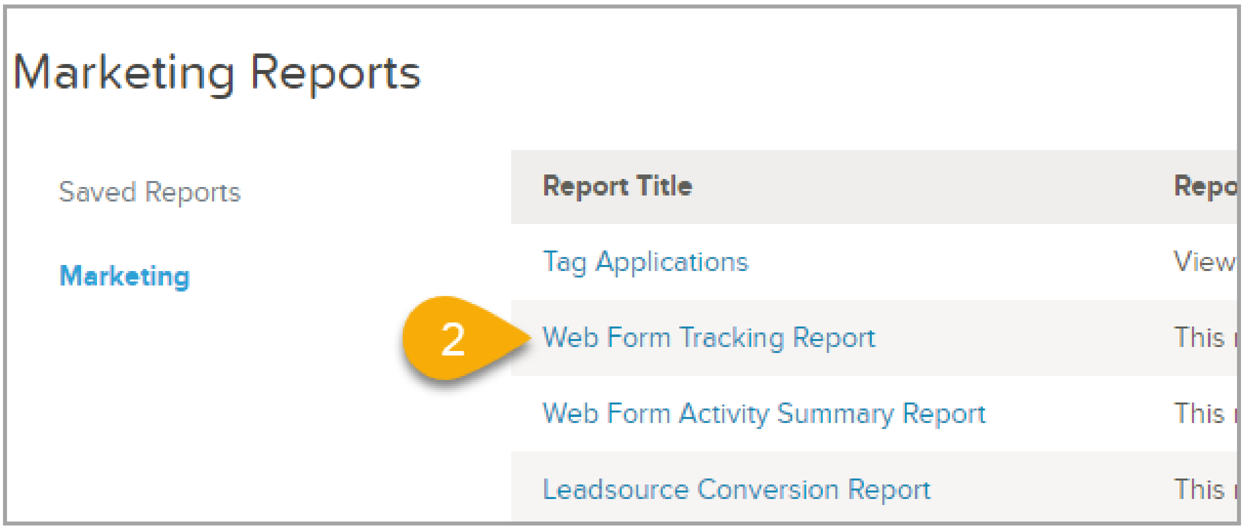
Use the Web Form tracking report to view the Web Form submissions for specific forms within a given date frame.

This report is only for Web Forms and Legacy Landing Page .

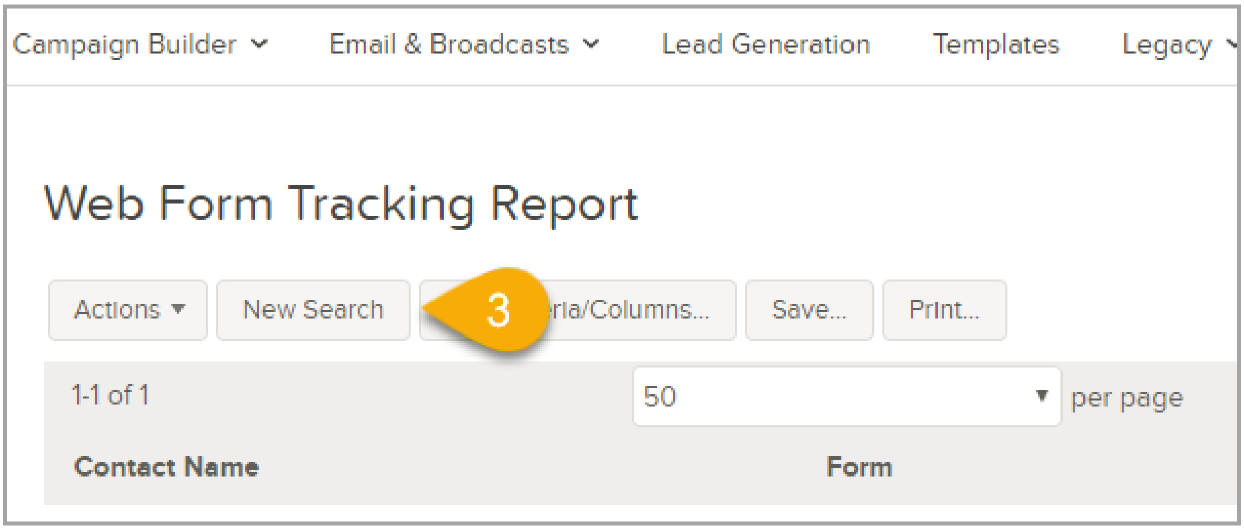
1. Go to **Marketing** > **Reports**



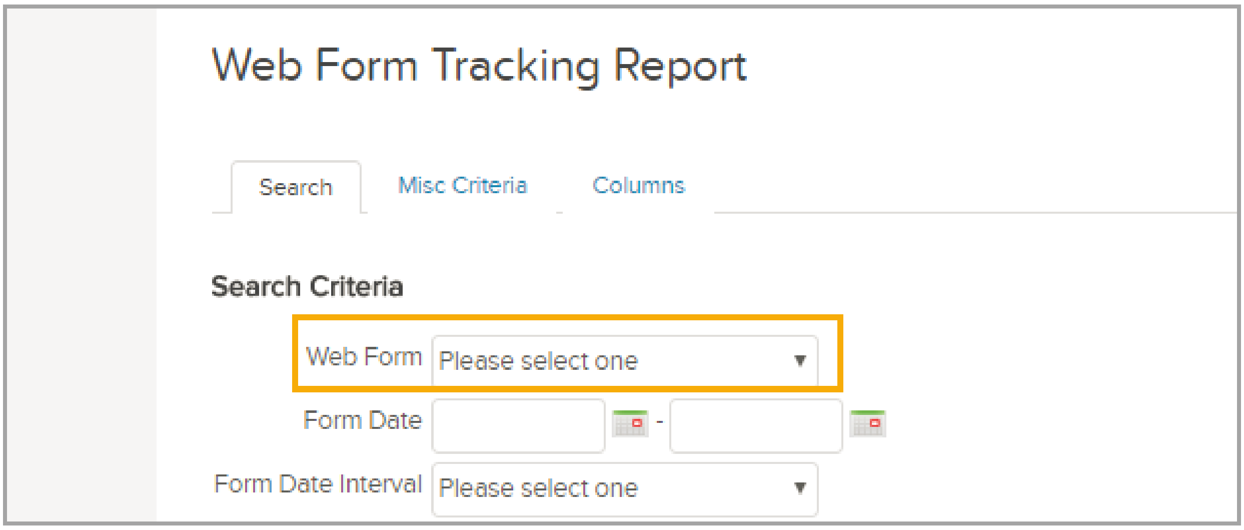
2. Click **Web Form tracking Report**



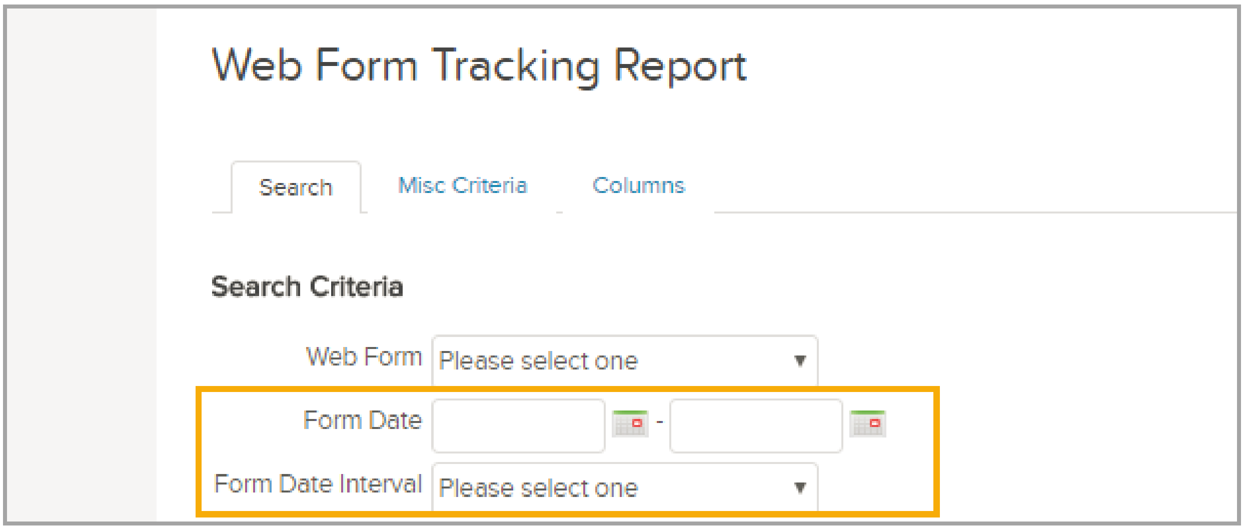
3. Click **New Search**



4. Select the Web Form from the drop down



5. Enter a Date range or just click **Search** to pull all submissions


Web Form Tracking Report
Search
Misc Criteria
Columns
Search Criteria
Web Form
Please select one
Form Date
Form Date Interval
Please select one

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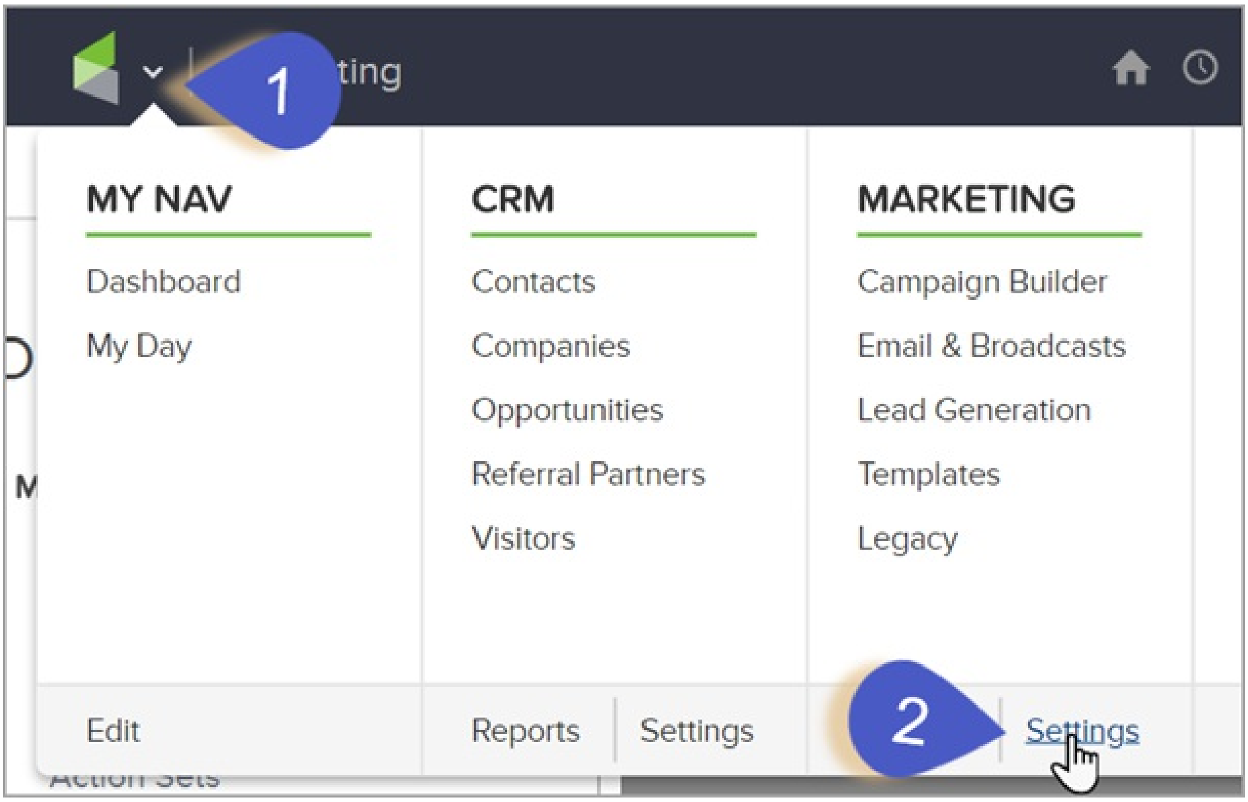
Merge Field Defaults Explained

Last Modified on 07/23/2018 2:26 pm MST

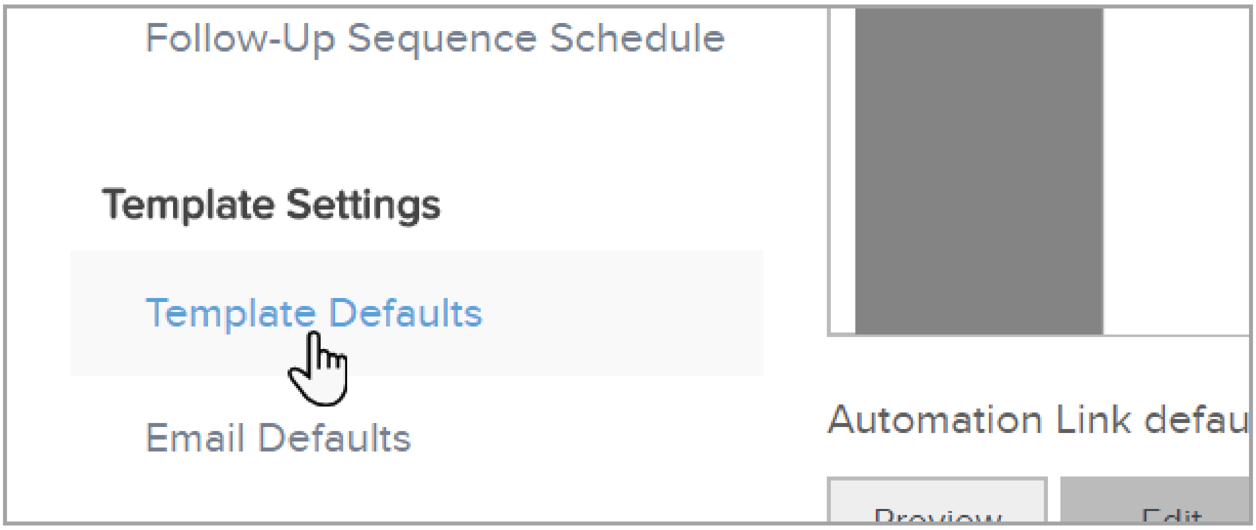
Merge fields are used to personalize follow-up communications on an individual basis. They pull information from a contact record and insert that information into emails and other templates. In the example below, the merge field (**~Contact.FirstName~**) pulls a name from the contact record and ~Owner.Signature~ pulls information from the assigned user.

In some cases, a contact record may not contain the referenced information and there may not be an assigned user. You can use merge defaults to automatically insert a value into messages when the system cannot find a field value in the contact record so that every email will have some type of value instead of a blank space.

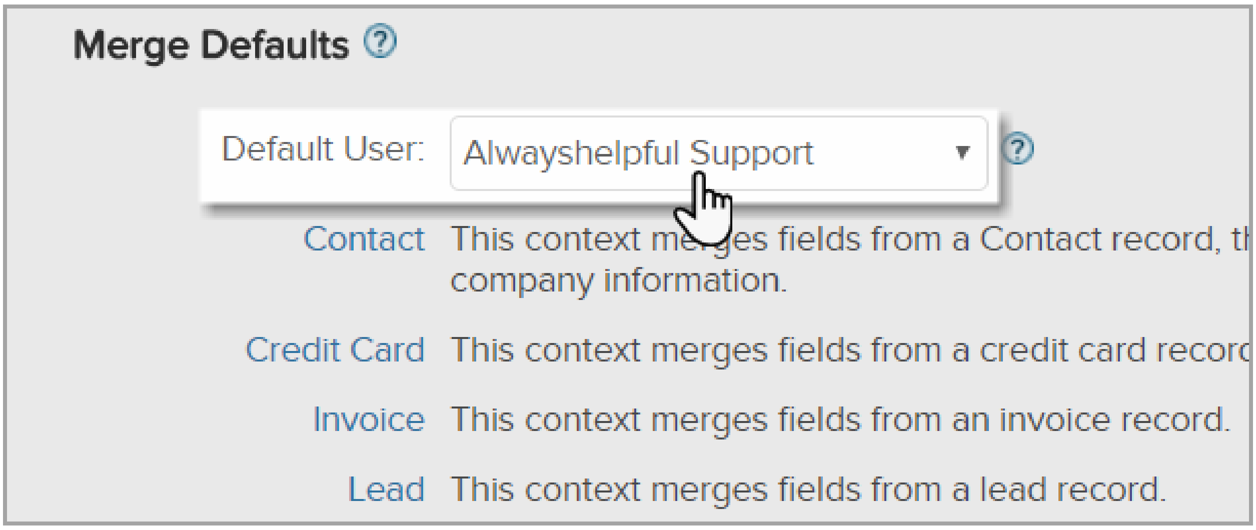
To change the default user, Go to **Marketing** > **Settings**



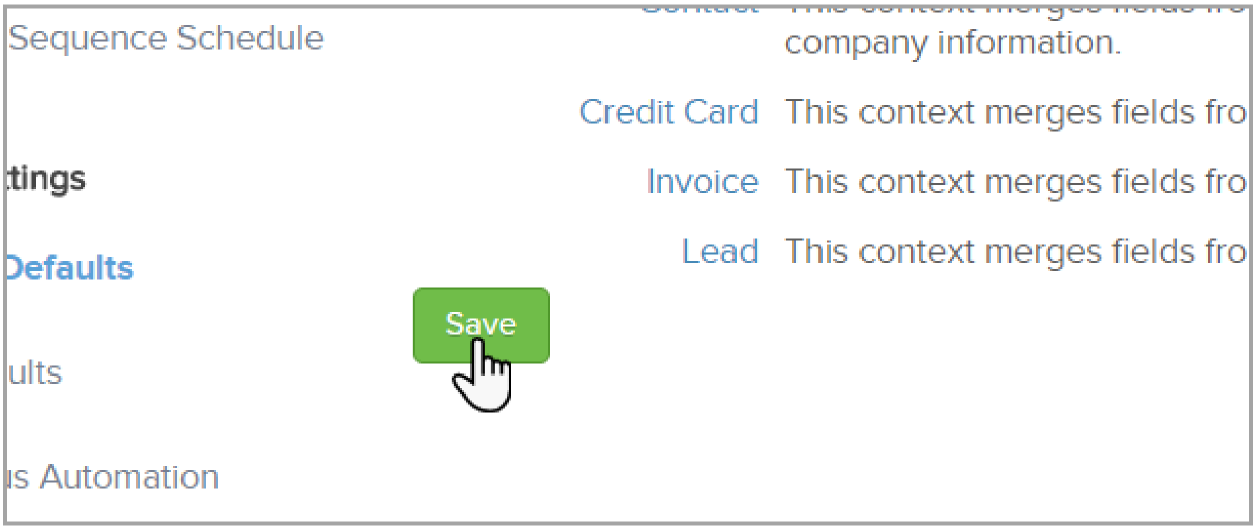
Click on **Template Defaults** in the settings menu.



Go to the **Merge Defaults** section and select a user from the Default User dropdown.



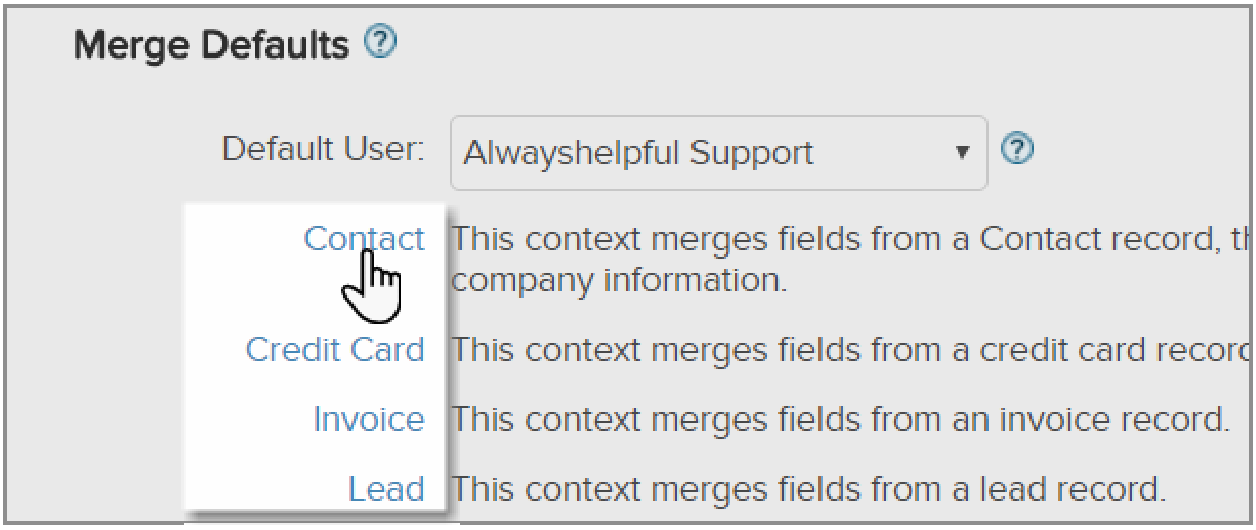
Click **Save** to apply the update.



Change the Global Merge Defaults

Merge defaults are inserted into communications when the related information is missing from a contact record. You can set up global merge defaults that apply to all email and other templates. However, you override the global settings for individual email templates. In the example above, you may set up a default value of friend or associate that will take the place of the contact's first name when no first name can be found.

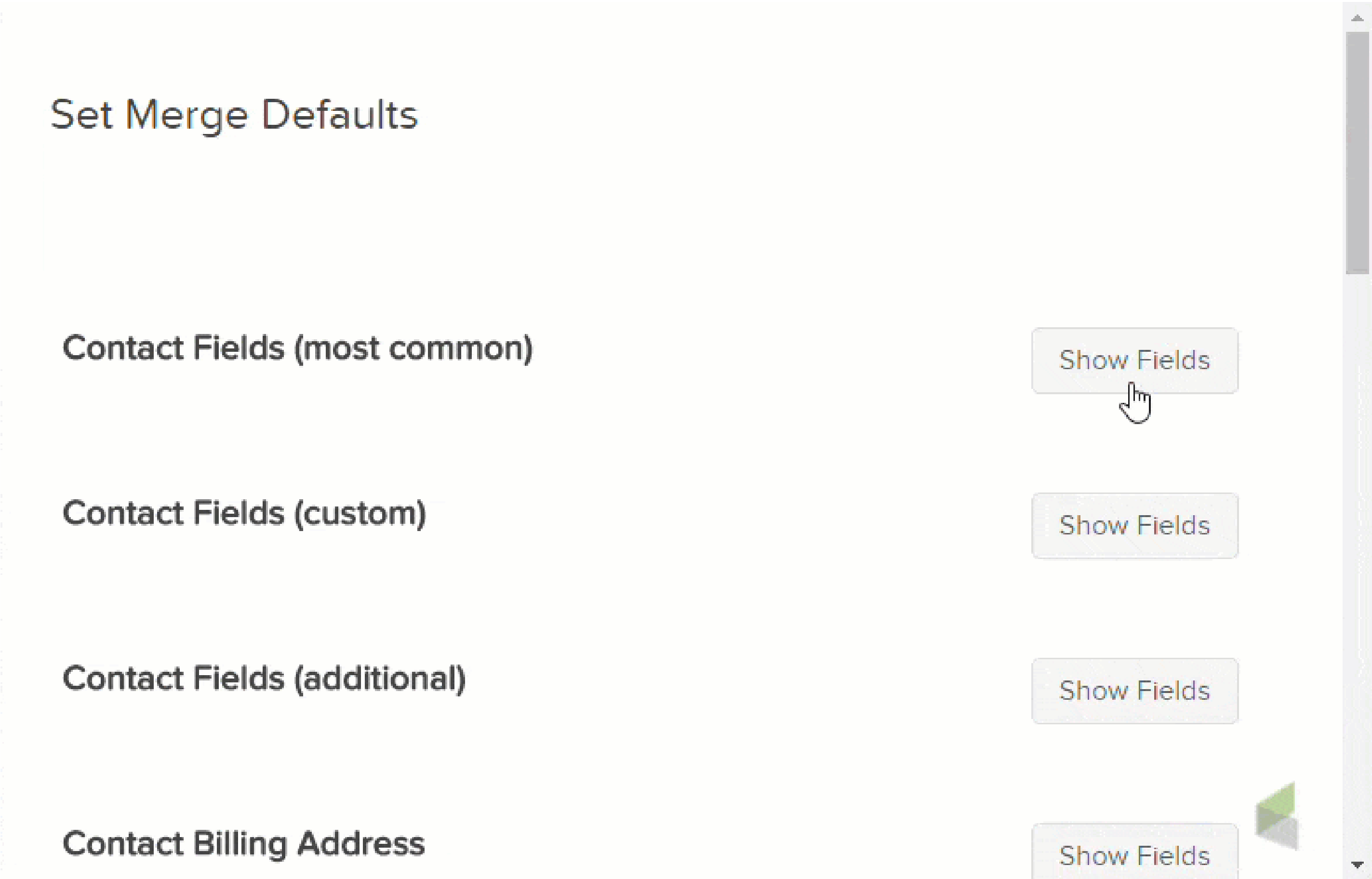
Click on the **Contact, Credit Card, Invoice, or Lead** link.



Click on **Show Fields** to display all available merge defaults.

Protip: This will open as a pop-up window. Make sure your browser doesn't have a pop-up blocker enabled.

Enter in a default value for each appropriate field.



Note: You do not have to enter a value in each box. If a box is left empty, the default will be to display nothing.

Save the changes and close the window


Referral Partner Fields
Show Fields
Referral Partner's Fields
Show Fields
Save

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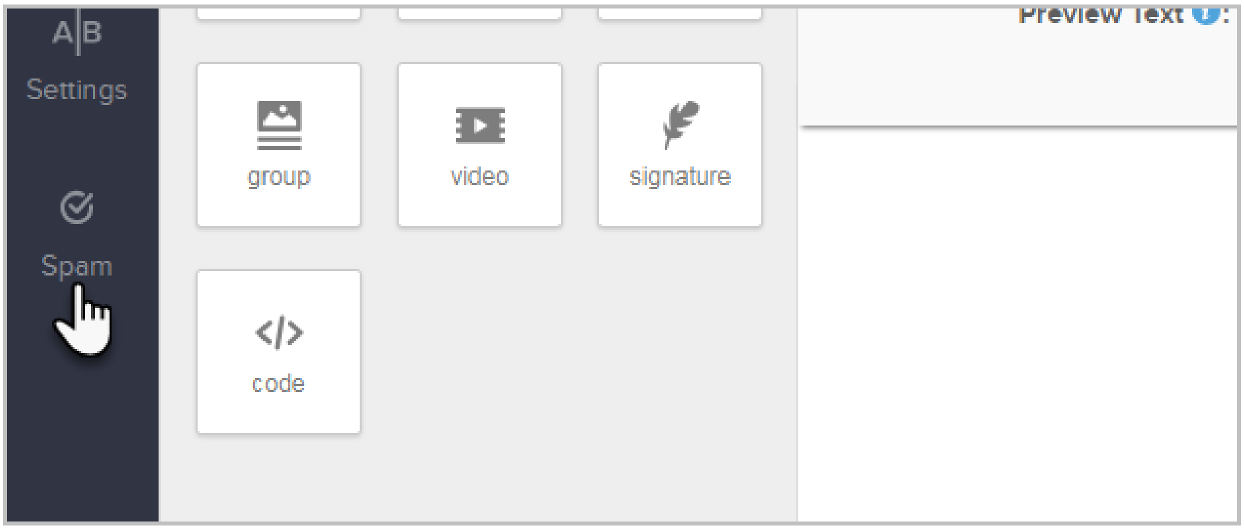
Content Risk Services

Last Modified on 07/23/2018 2:27 pm MST

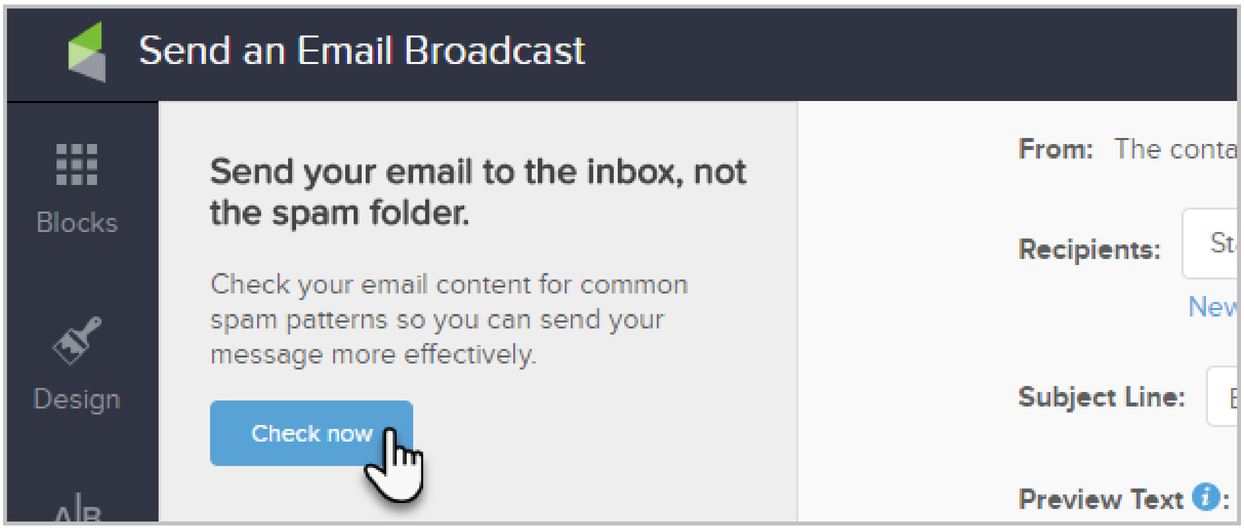
The email builder has built-in functionality to help you avoid triggering spam filters. Certain keywords can trigger these filters, which send your email straight to your contact's junk folder, where it sits unread. You can check your emails for these keywords by clicking the "Spam" icon in the email builder. These keywords will also be flagged when you click "Review and send" before sending your email.

Please Note: This is currently only available when sending an email broadcast

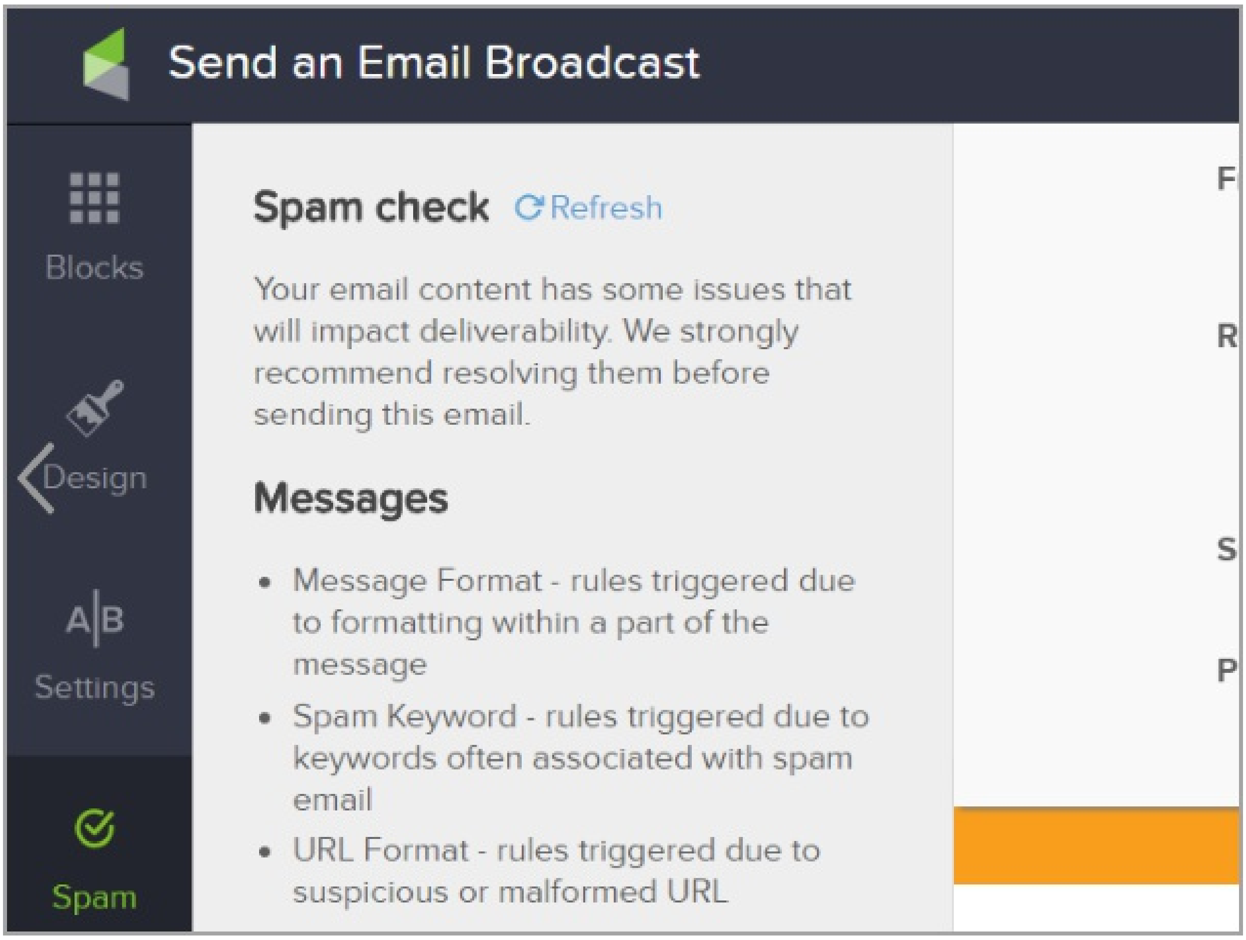
1. You can manually check the contents of an email you are composing by first clicking the **Spam** button.



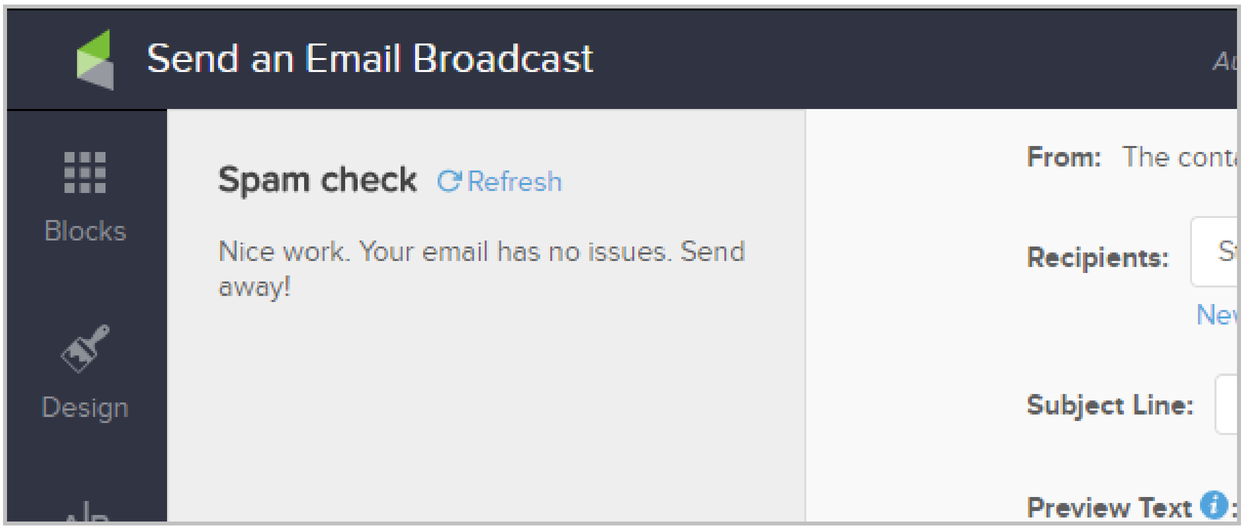
2. Click **Check now**



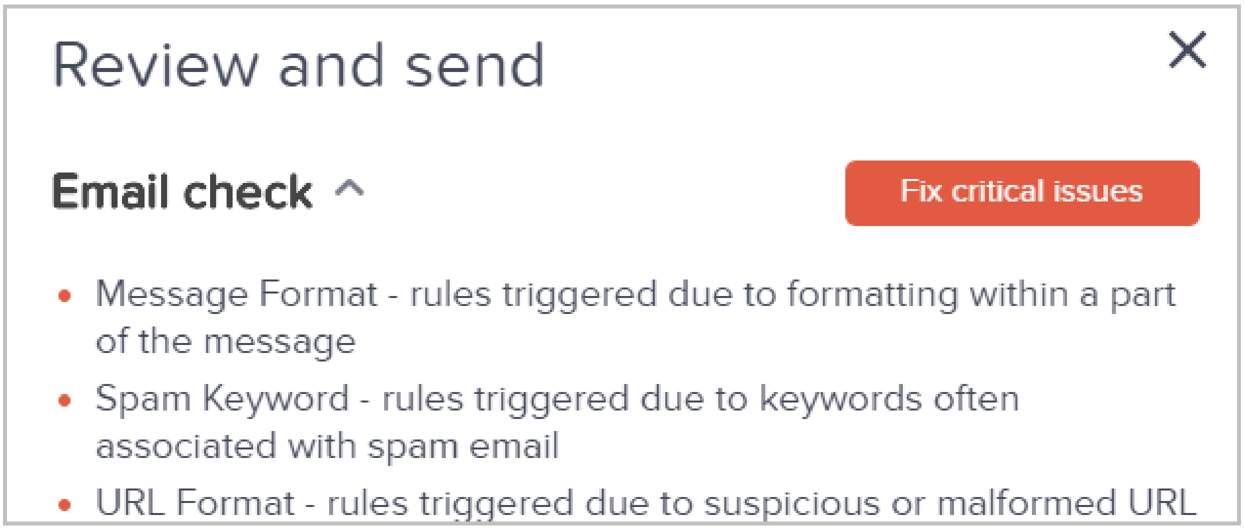
3. You will then be presented with an alert message detailing the errors that need to be resolved prior to sending the email



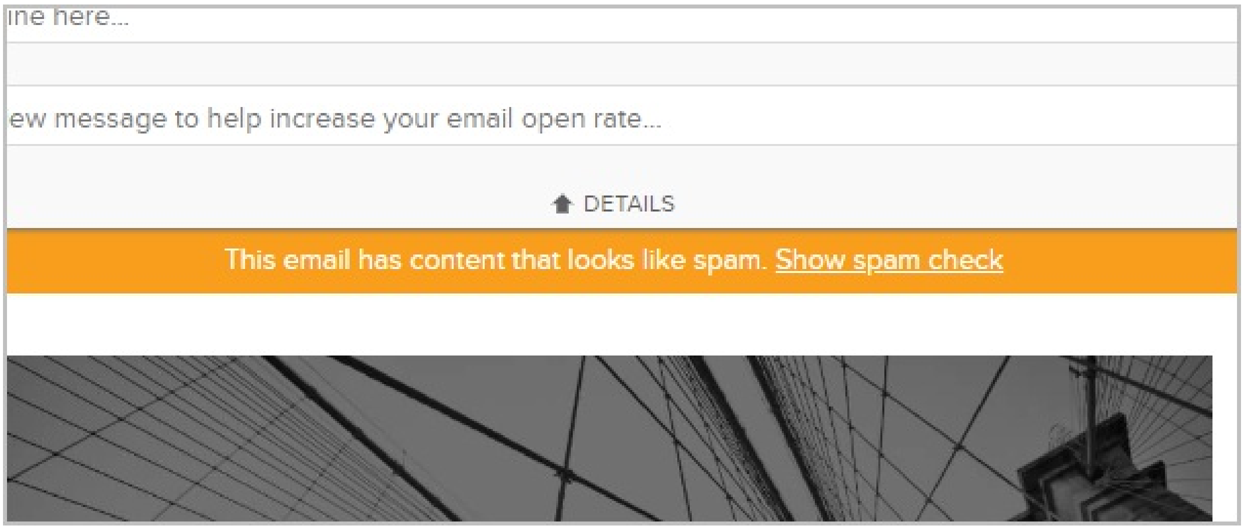
4. You will also be notified if there are no issues found



5. Also, when you click **Review and Send**, you will be presented with a new modal that will give your email a final check so you can fix any issues prior to sending.



6. If you are working in an email that has been flagged for Spam content, you will see an orange banner at the top of the email.



7. Clicking the **Show spam check** link simply brings you back to the **Spam** check section of the Email Builder

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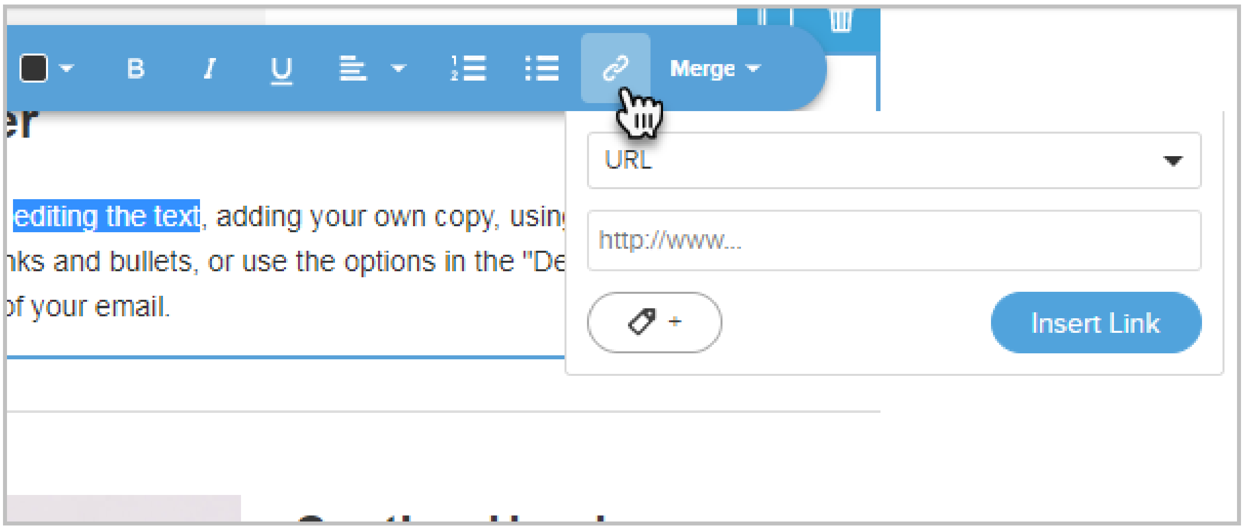
Add Links To Emails

Last Modified on 07/23/2018 2:15 pm MST

Links you add to campaign sequence emails serve more than one purpose:

- They track engagement. Link clicks are recorded and taken into account on various reports. The links give email recipients a way to interact with the content you send to them.
- They serve specific purposes. Opt-in and opt-out links are designed to help you follow email marketing best practices and minimize spam complaints.
- They can satisfy campaign goals. The links you add to emails can be identified as a goal method that moves a contact from one campaign sequence to another.

1. Select the text or image you would like to hyperlink and then click on the **Link** icon to add your link.



2. Select a link type from the drop down
   - **Web address:** Enter the full URL of the website: *http://yourwebsite.com/blog/business*.
   - **Email address:** Enter an email address: *rachel.baker@yourwebsite.com*.
   - **Thank-you page:** This is a thank-you page hosted by Infusionsoft. Use the WYSIWYG or HTML source editor to create a simple thank-you message.
   - **Hosted Email page:** This is usually used in the pre-header of an HTML email or in the plain text version of the email. It links to the hosted version of the email in

case someone has difficulty viewing it in their email client.
    - **Update page**: This links to a page that displays the contact's current contact information and allows then to make changes if something is no longer accurate.
    - **Update / Opt-Out page**: This links to a page where a contact can either update their information or unsubscribe from email marketing (or both.)
    - **Opt-Out page**: This links to a page where a contact can unsubscribe from all email marketing.

3. Click on the **Insert Link** button to add the link to the email.

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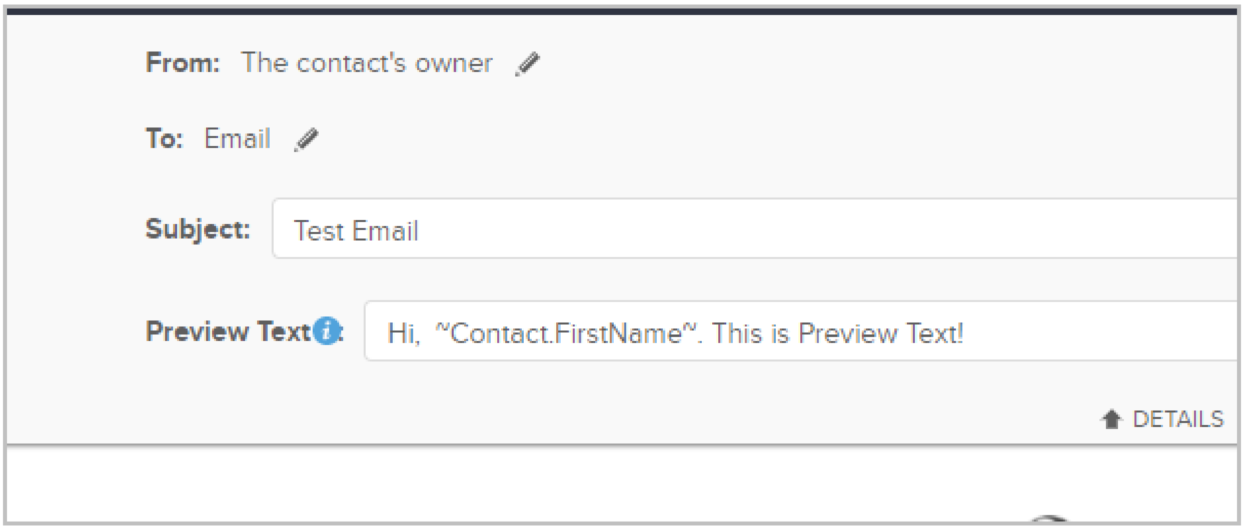
Change Email Preview Text

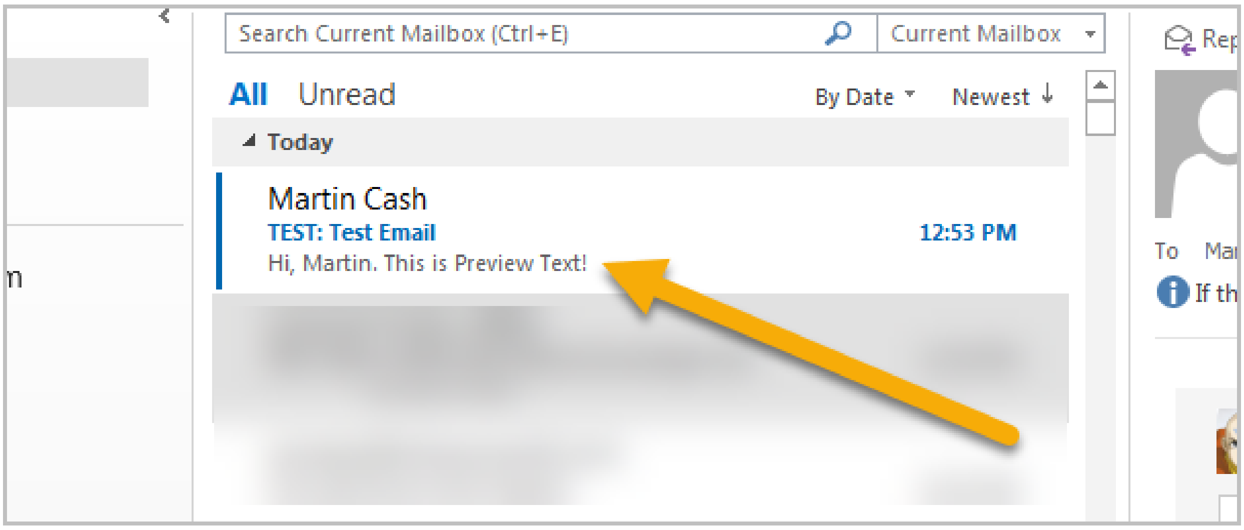
Last Modified on 07/23/2018 2:34 pm MST

Preview text is what your recipient sees in their email client before opening an email. The content in this section can greatly impact open rates! The preview text should contain something compelling that drives the recipient to open the email.

1. When configuring an email, you will see the Preview Text section below the subject line.



2. Enter your text:
    - Up to 75 characters
    - Can include merge fields
3. The preview text will be shown right below the subject line in the recipient's preview pane.



Pro-tip! How many characters the recipient sees is dependent on their email client and the method in which they are viewing (mobile for instance.)

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How To Link To A Web Form In An Email

Last Modified on 07/23/2018 2:36 pm MST

This article shows how to quickly create a link in an email that leads to a web form.

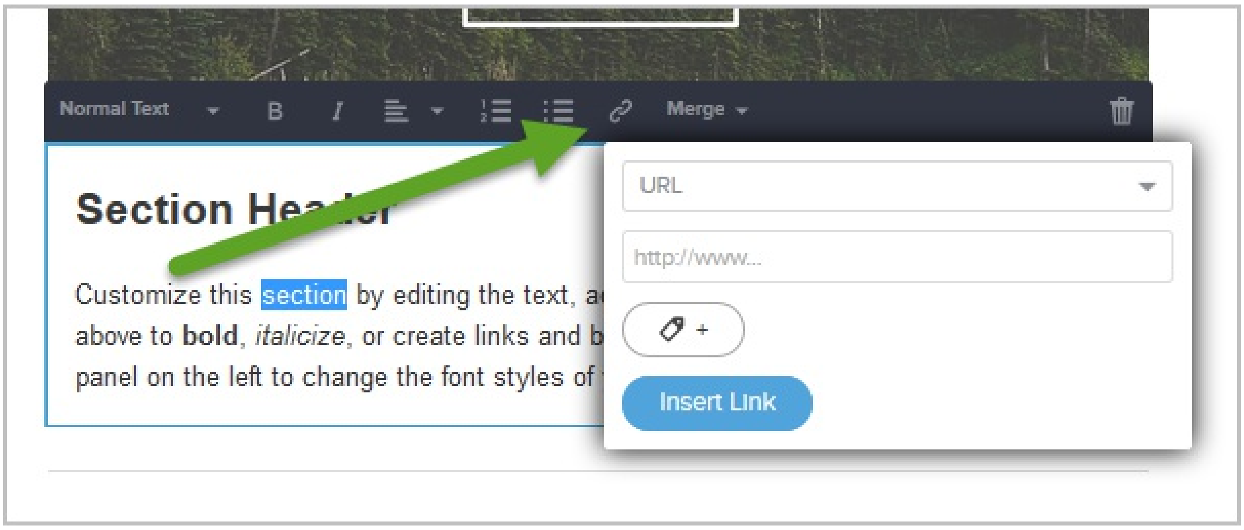
High-level overview:

- Make sure to have a web form already created and published in a campaign
- Create a Broadcast or Campaign Builder email
- Create link using quick links

Pro-tip! This will only work for the Drag and Drop Builder and Email Builder, but not the Classic email builder

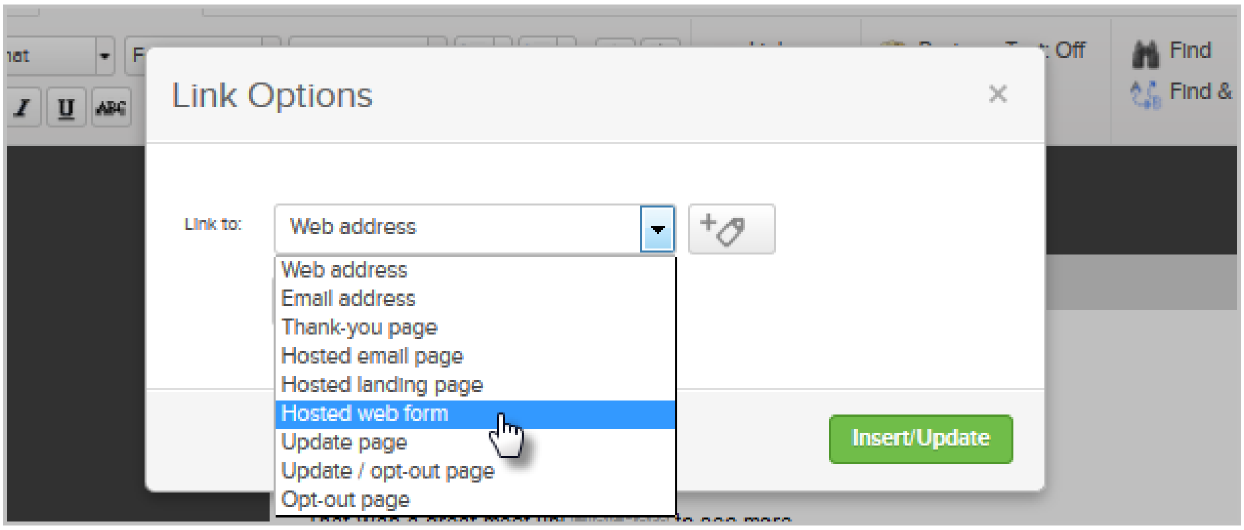
Email Builder

1. Highlight a word or group of text
2. Click on the **link** icon
3. Choose the "Web Form" option in the "URL" drop down
4. Choose the name of the Web Form
5. Click **Insert Link**



Drag and Drop Builder (legacy)

1. Highlight a word or group of text
2. Click on the **link** icon
3. Change "Web Address" to "Hosted web form"
4. Type to search for your web form
5. Click **Insert/Update** button



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Html Support In Email Clients

Last Modified on 07/23/2018 2:23 pm MST

The vast majority of Email clients typically do not support the latest interactive web technologies. Here is a list of the most common asked-about elements that are either not supported or have limited support by most email clients:

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HTML Block

Last Modified on 09/17/2018 7:26 pm MST

You are able to add snippets of HTML code into your email using the HTML block. This guide is going to review the type of code the HTML block accepts.

There are a few different versions of HTML. The common version these days is HTML5, which is considered a "loosely" written language. XHTML is an older version is a "strictly" written language, which leaves less room for mistakes.

The BARD builder itself renders in HTML5, but when sending or looking at the preview, the email will render in XHTML. This is because in HTML5, you don't need to use a self-closing tag (though it's a best practice to do so regardless). In XHTML, however, you do.

All XML Elements Must

- XHTML Elements Must Always Be Closed
- Empty Elements Must Also Be Closed
- XHTML Elements Must Be In Lower Case
- XHTML Attribute Names Must Be In Lower Case
- XML tags are case sensitive. The tag is different from the tag

XML Elements Must be Properly Nested

In HTML, you might see improperly nested elements:

```
<b><i> This text is bold and italic </b></i>
```

In XML, all elements **must** be properly nested within each other:

```
<b><i> This text is bold and italic </i> </b>
```

In the example above, "**Properly nested**" simply means that since the *element is opened inside the* ***element, it must be closed inside the element.***

Another example is, instead of doing something like:

```

```

You would need to actually close the tag as with a /

```
/>
```

There are five pre-defined entity references in XML:

<	<	less than
>	>	greater than
&	&	ampersand
'	'	apostrophe
"	"	quotation mark

Only < and & are strictly illegal in XML, but it is a good habit to replace > with > as well.

White-space is Preserved in XML

XML does not truncate multiple white-spaces (HTML truncates multiple white-spaces to one single white-space):

XML:	Hello Tove
HTML:	Hello Tove

Source: https://www.w3schools.com/xml/xml_syntax.asp

Helpful tools to clean code:

Paste your code there, and click on "fix IT" this will fix any small errors in the code, and you can use the fixed code in the element, and the errors should be fixed. http://fixmyhtml.com/

HTML To XHTML Code Converter:

http://www.csgnetwork.com/cvthtml2xhtml.html

http://www.cruto.com/resources/code-generators/code-converters/html-to-xhtml.asp

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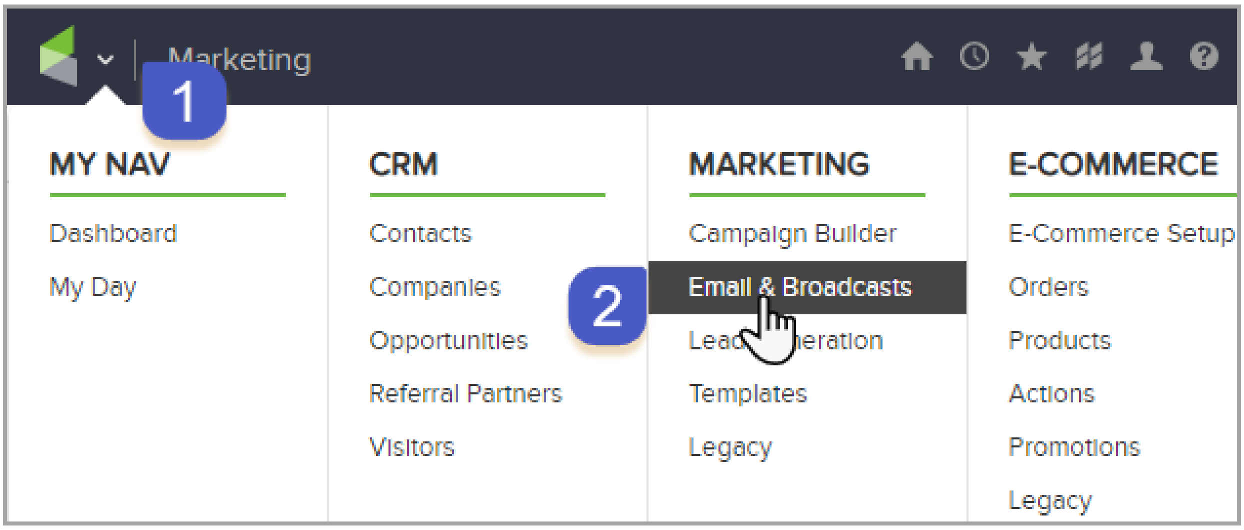
Import Legacy Template

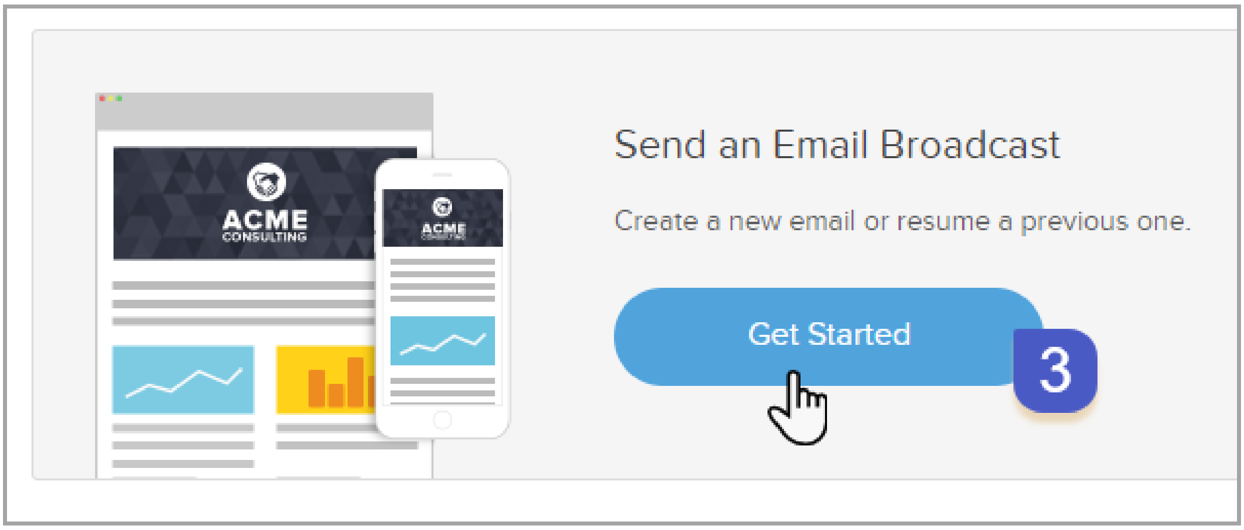
Last Modified on 09/28/2018 12:39 pm MST

Here are the steps to Import a Legacy Email Template into the current Email Builder.

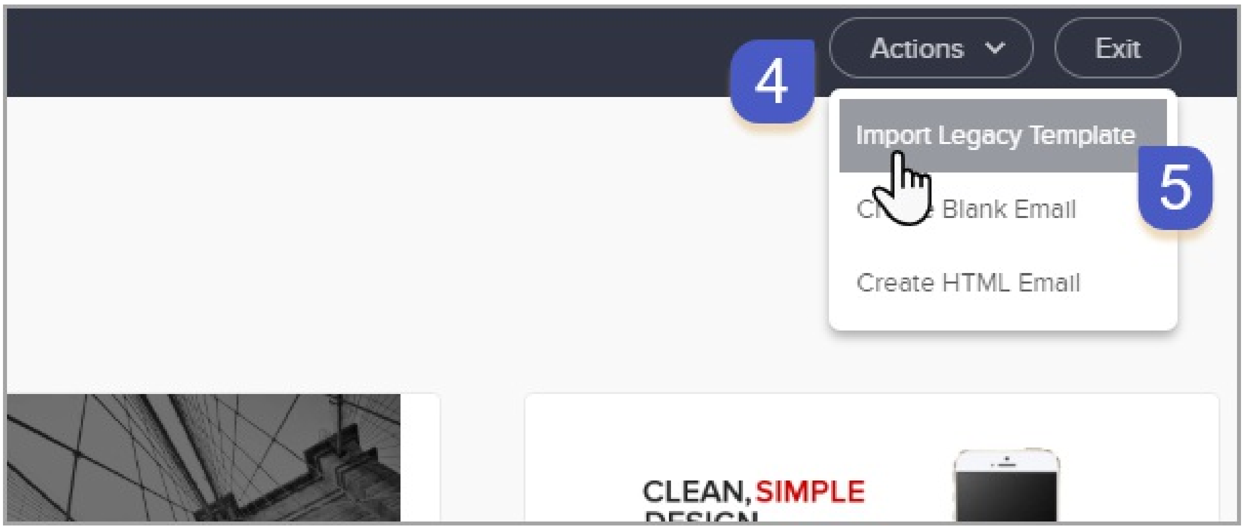
1. Go to Nav > Marketing > Email & Broadcasts



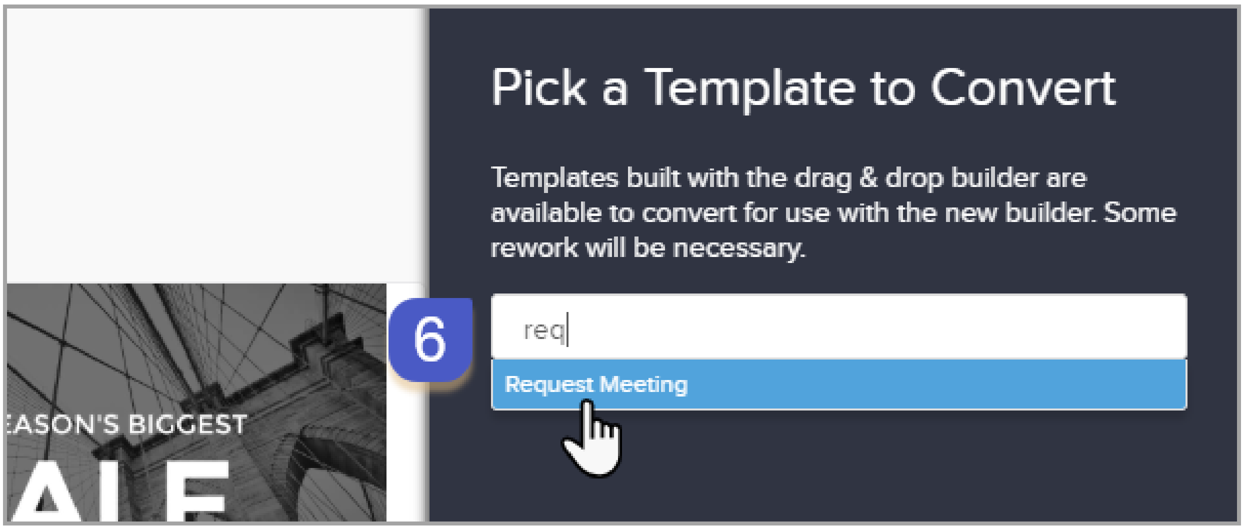
2. Click "Get Started"



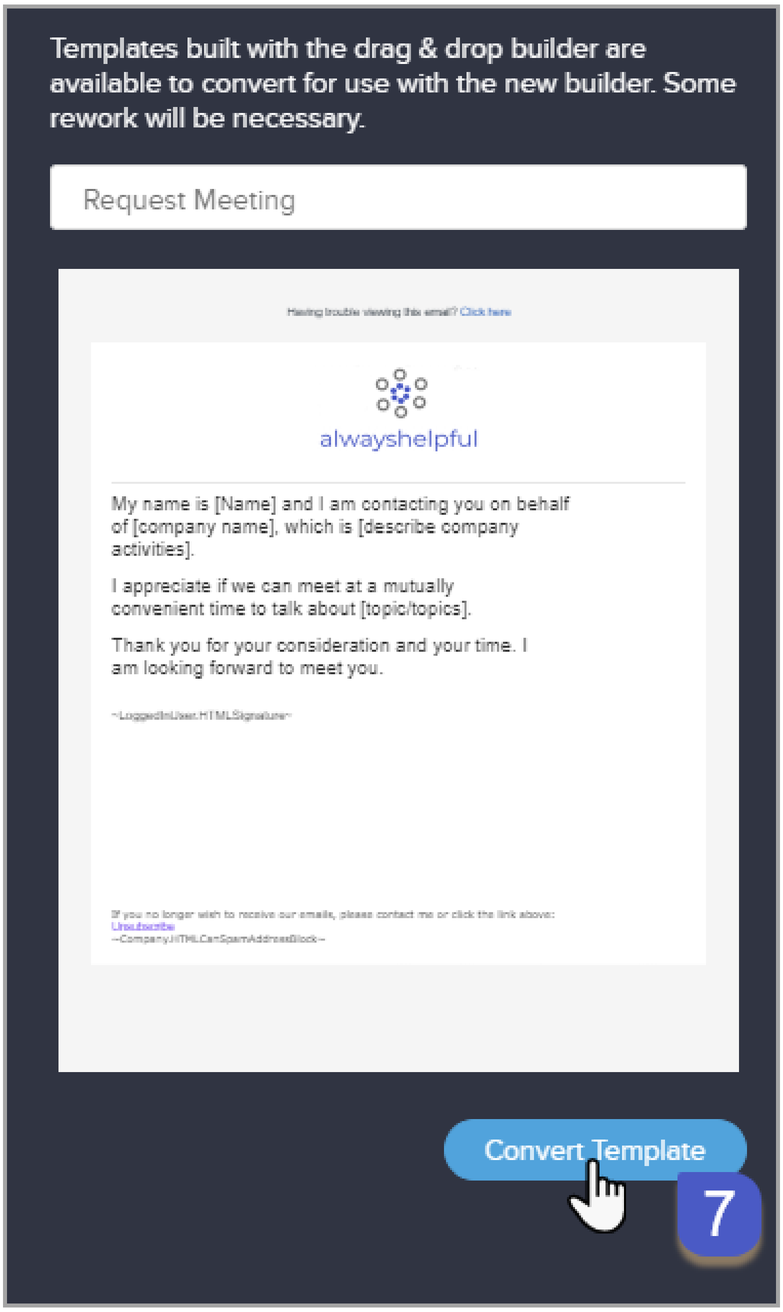
3. From the top right click "Actions" drop down and select "Import Legacy Template"



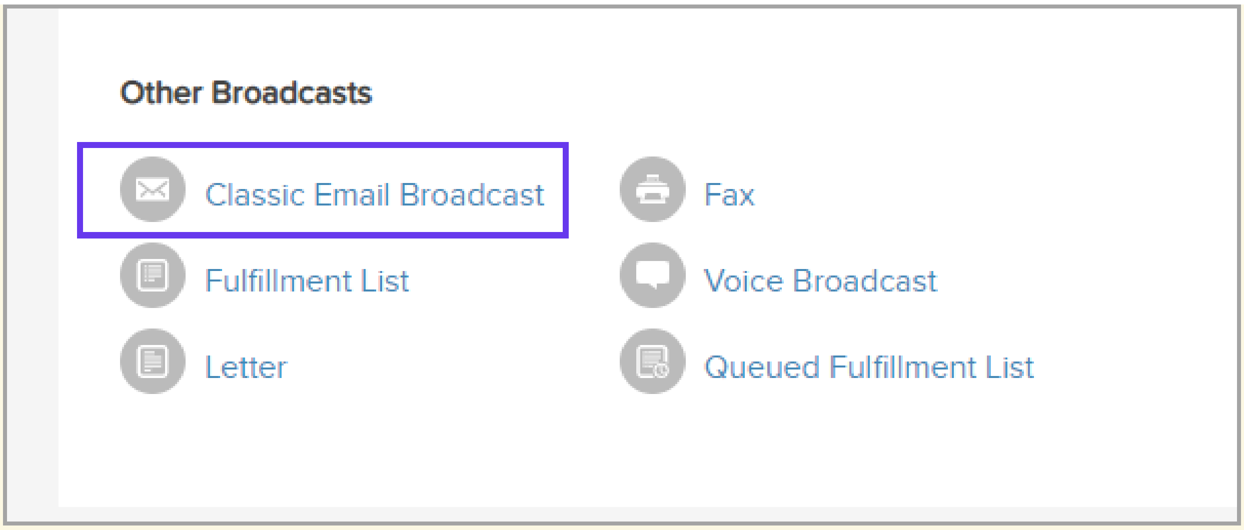
4. You can either scroll through the available templates or simply type the name of the template.



5. Click "Convert template"



Note: If your email was created though the "Classic Email Broadcast" it cannot be converted. You can either rebuild it in the current Email Builder or go to Nav > Marketing > Templates to create a template to convert. Either way you would need to rebuild the email.


Other Broadcasts
Classic Email Broadcast
Fax
Fulfillment List
Voice Broadcast
Letter
Queued Fulfillment List

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Send an Email Broadcast

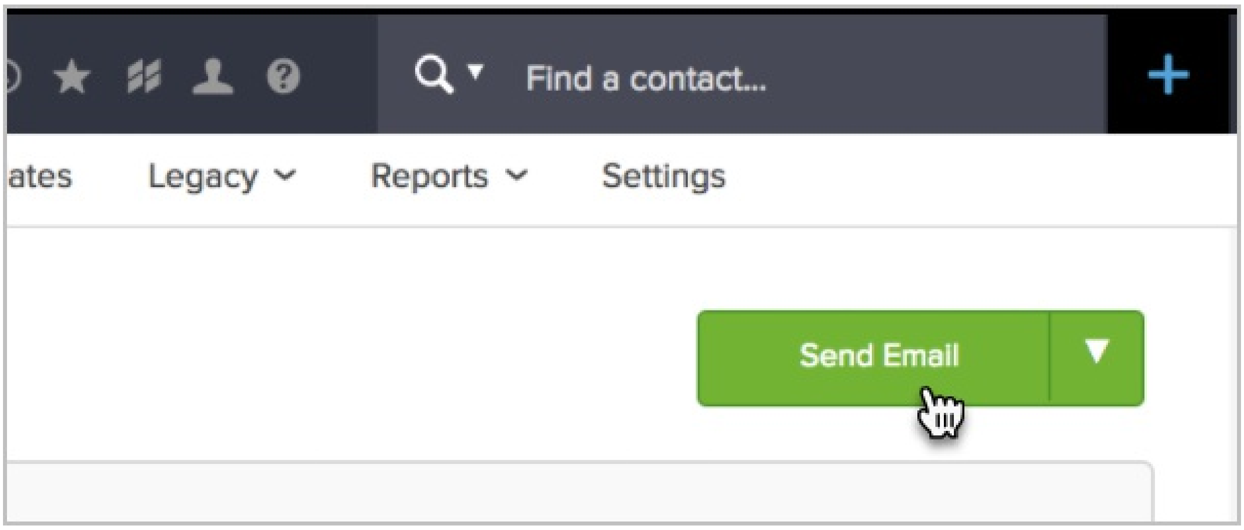
Last Modified on 09/28/2018 10:19 am MST

A broadcast message is a single message that is sent to an entire list of people at the same time. It can be scheduled to go out on a specific date and time, but the schedule is the same for everyone. A broadcast is generally the best option when you need to send the same message to everyone at the same time (e.g., a monthly email newsletter). It is also the best option for sending messages that require frequent updates.

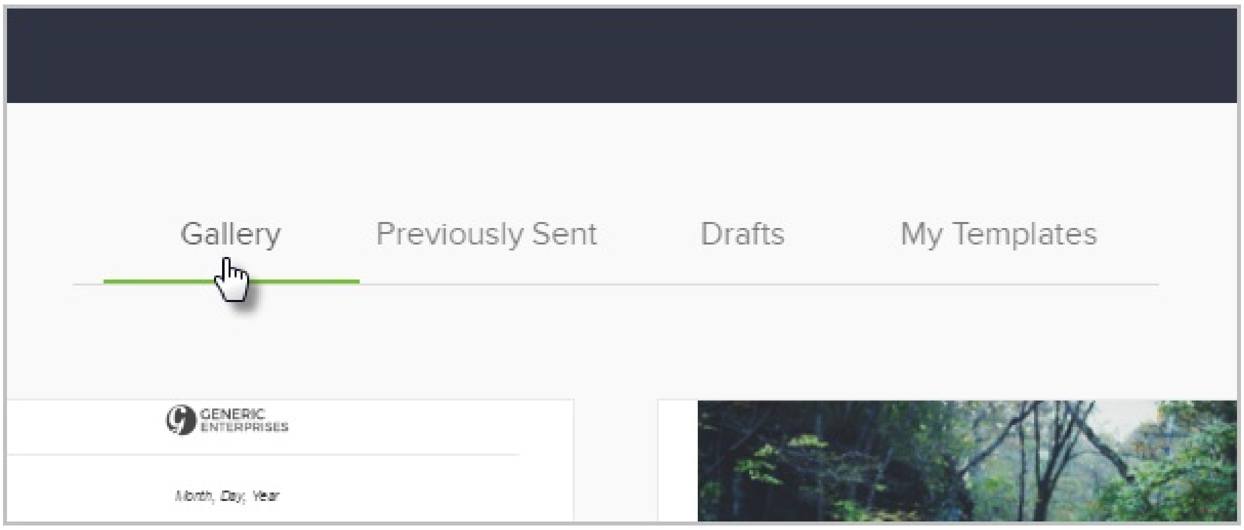
Pro-TIp! Email marketing is permission-based marketing. Make sure you have permission before you send a broadcast. Review the Infusionsoft Acceptable Use Policy.

1. Go to **Marketing** > **Email Broadcasts**

2. Click **Send Email**



3. Choose your template

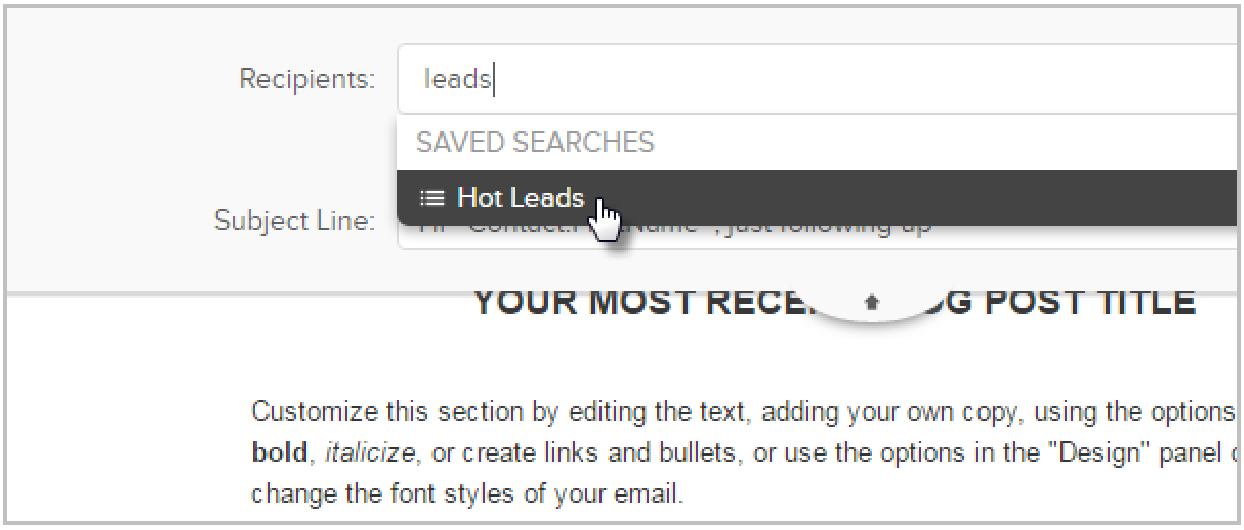


You can choose from:

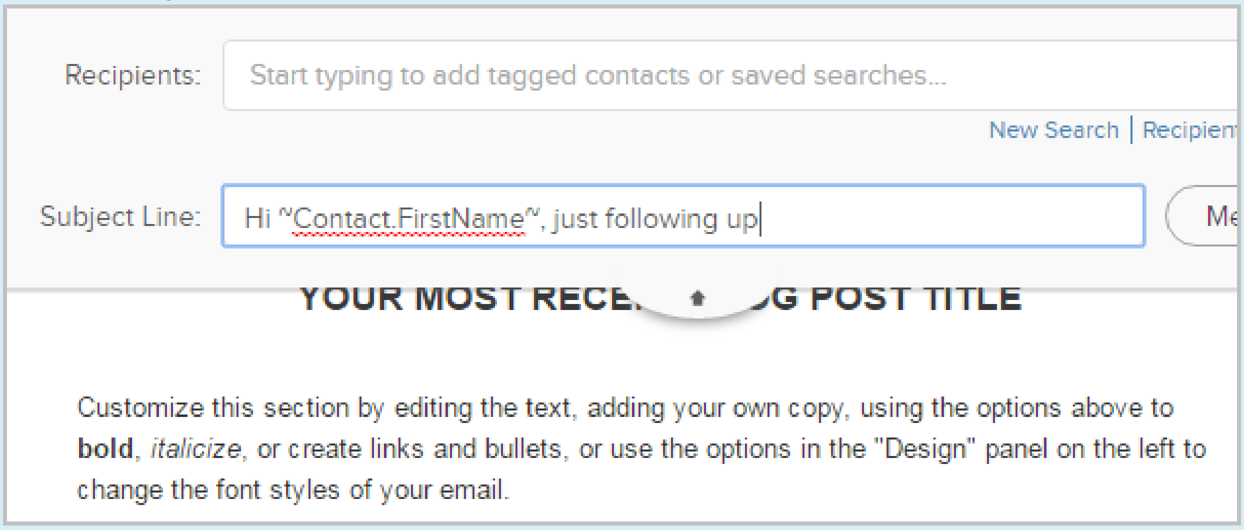
- **Gallery**: The Gallery contains several starter templates that you can use. Just hover over the template icon and click the "eye" icon to preview the template, or click **Use Template** to start customizing it.
- **Previously Sent**: This section contains a list of the most recent email broadcasts that you've sent. Hover over the template and click **Use as Draft** to start customizing it. You can also click the **Save** icon to save the template to the "My Templates" area.
- **Drafts**: When you are customizing an email template and click the **Save & Exit** button, the email will be saved as a draft so that you can come back to it later.
- **My Templates**: To save an email template to the "My Templates" area, click on **Previously Sent**, hover over the email template and click the **Save** icon. To save a template while in the campaign builder, click the **Actions** drop-down while

customizing the template and select, **Save to My Templates**.

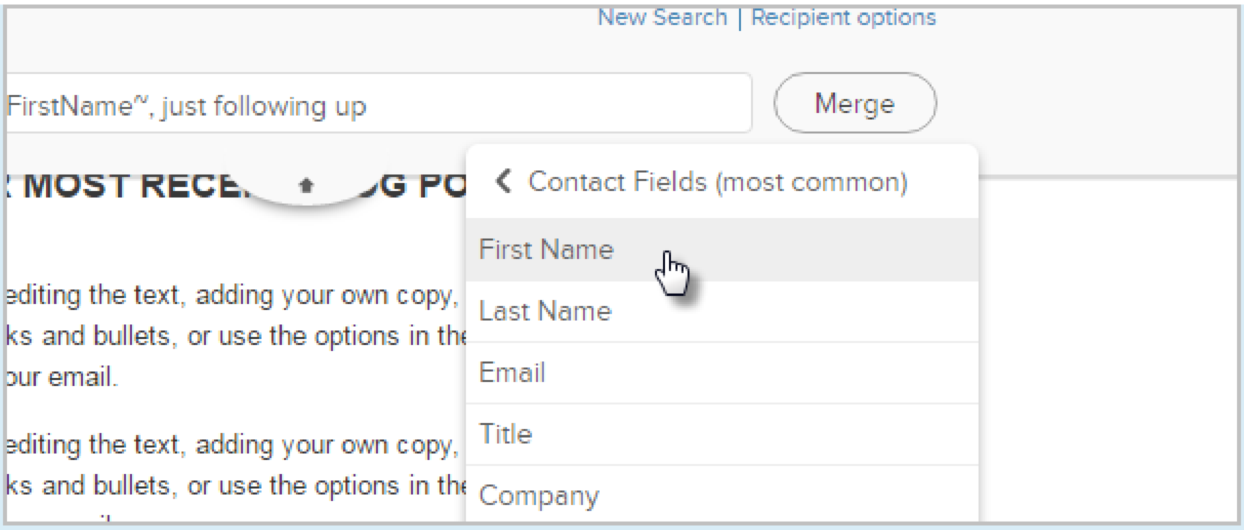
4. Chose the Email Broadcast recipients. Click inside the search box to find an existing tagged list, or click the **New Search** link to create a new list to send this message to. (Optional) Click the **Recipient options** link if you need to change the default "To" email address.



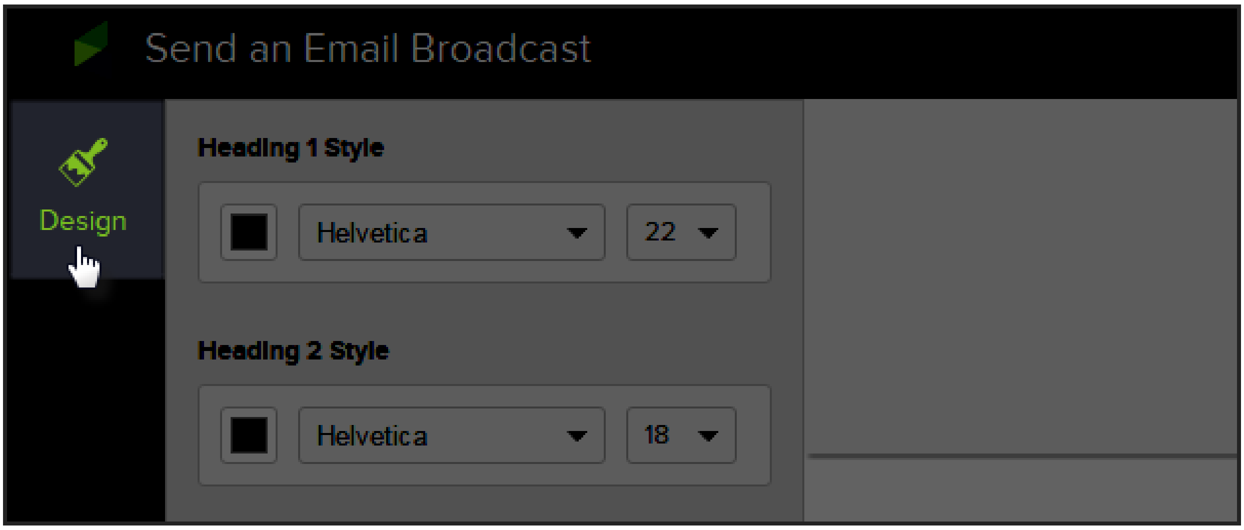
5. Enter a Subject Line



Pro-Tip! You can personalize the subject line by merging in the recipient's contact details. For example, if you want the subject line to call out their first name, click inside the subject line text box and click the **Merge** button > **Contact Fields (most common)** > **First Name**.



Customize the Email (Design View)



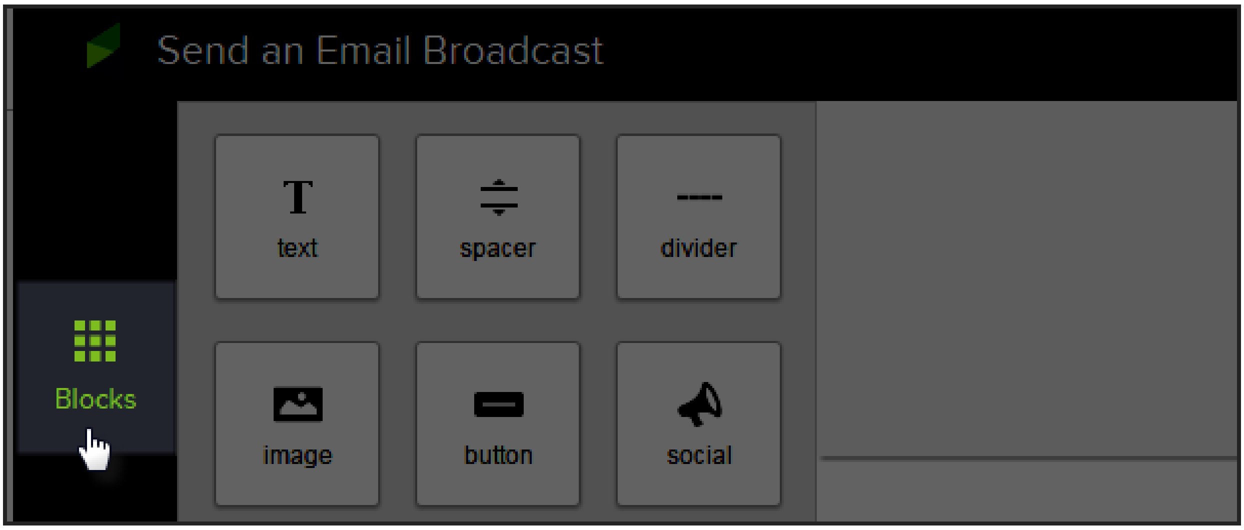
Pro-Tip! Your work is auto-saved every 30 seconds

In Design View, you can style various attributes of the email.

- **Heading 1 Style:** This allows you to configure the font, color and size of any text in the template that is formatted as "Heading 1". You can specify text as "Heading 1" by highlighting some text and choosing **Heading 1** from the drop-down.

- **Heading 2 Style:** This allows you to configure the font, color and size of any text in the template that is formatted as "Heading 2". You can specify text as "Heading 2" by highlighting some text and choosing **Heading 2** from the drop-down.
- **Normail Text:** This allows you to configure the font, color and size of any text in the template that is formatted as "Normal Text". You can specify text as "Normal Text" by highlighting some text and choosing **Normal Text** from the drop-down.
- **Hyperlink Style:** This allows you to format the color of hyperlinks in your email.
- **Email Background Color:** Changes the background color of the email.
- **Email Position:** You can toggle the position to**left-justified** (this is more typical when creating a personal, "hand written" email style) or **centered** for a more professional look.

Customize the Email (Blocks)



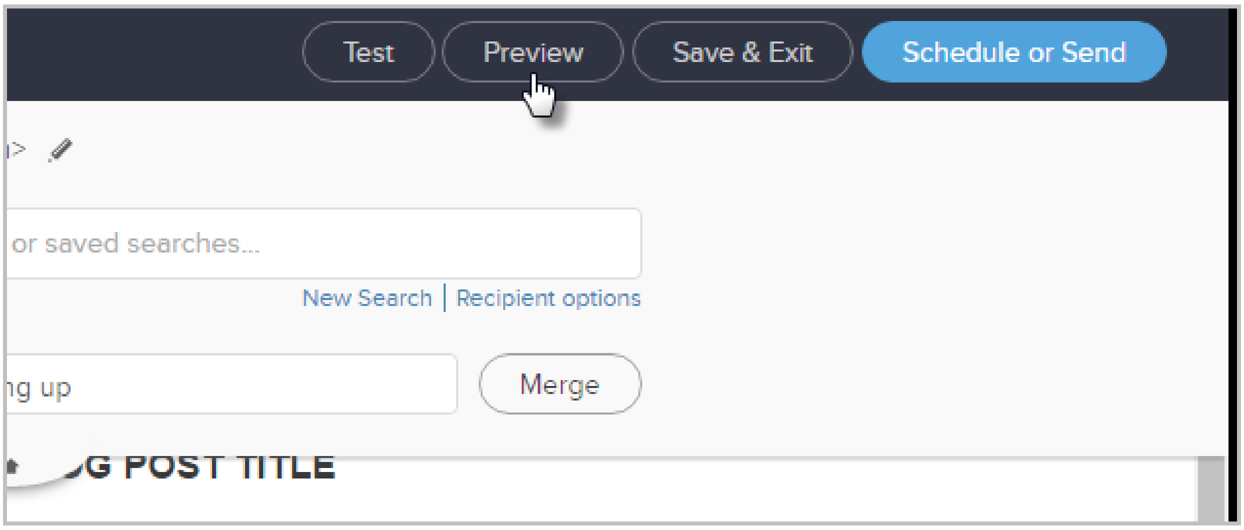
Click and drag blocks into your email to add new elements. To modify a block, select it and use the configuration panel on the left to make changes. For a Text block, just click inside the block and start typing.

- **Text:** Adds the most basic block for holding text.
- **Spacer:** Allows you modify the spacing between blocks (both verticle and horizontal).
- **Divider:** Adds a divider line across the width of the email.
- **Image:** Adds an image. You can choose an image from your image library, upload a new image, or link to an image on the web.
- **Button:** Adds a button on the email. The button can be a link to a page on your website, or you can send them to web forms, landing pages, etc...
    - **URL:** Sends them to the web page of your choice.
    - **Email Address:** This is a "mailto" link which opens the recipients default email client when they click on it.
    - **Phone Number:** Adds a phone number link which can be interacted with on a

mobile device.
    - **File Download:** Adds a download link from your filebox. You can also uplaod a new file.
    - **Web Form:** Choose from a list of Web Forms that you have created. When the recipient clicks the button, they will be redirected to the form.
    - **Landing Page:** Choose from a list of Landing Pages that you have created. When the recipient clicks the button, they will be redirected to the landing page.
- **Social:** Call out your social media channels with this block: Facebook, Twitter, LinkedIn, YouTube, Google+, Pinterest, and Snapchat.
- **Group:** This block adds an image, text, and a button all in one block.
- **Video:** Embeds a linked video thumbnail compatible with Wistia, Vimeo and YouTube.
- **Signature:** Merges the signature from your user profile.
- **HTML:** This block allows you to injecti custom HTML into the email.

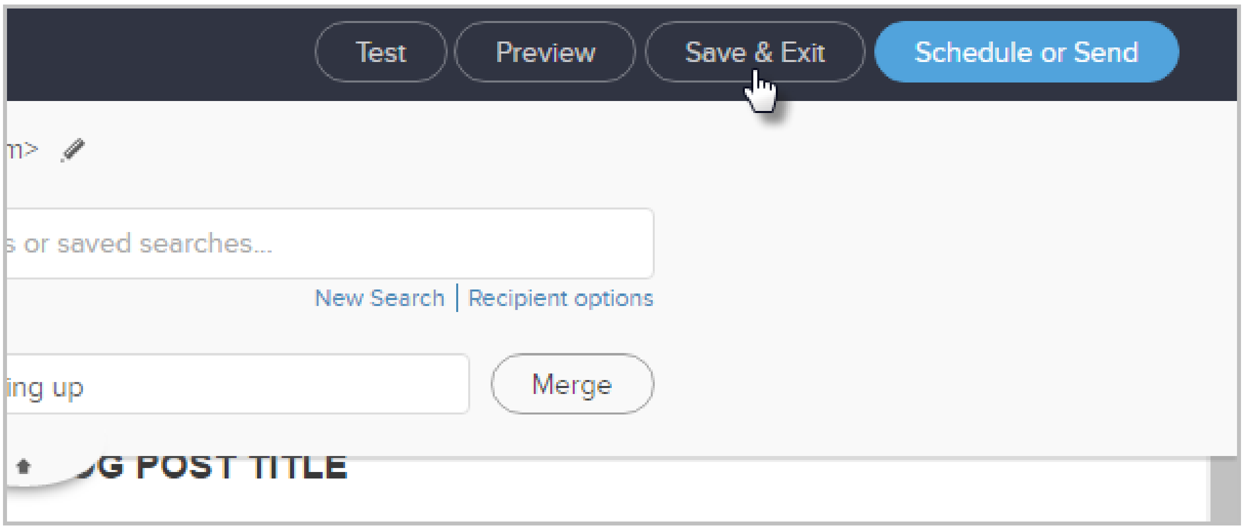
  Important Note! Using custom HTML in responsive emails could impact the way your email displays on different devices. Please test all emails before sending them to your entire customer list.

Preview and Test your email

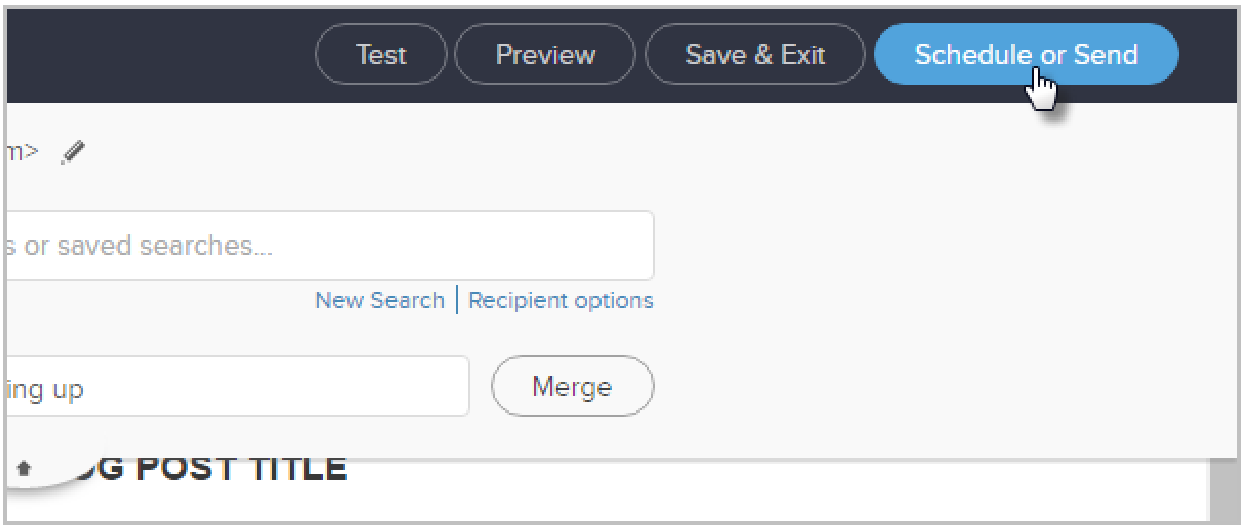


Click the **Test** button to send yourself an email, or just click the **Preview** button to see how the email will look in most email clients and mobile devices.

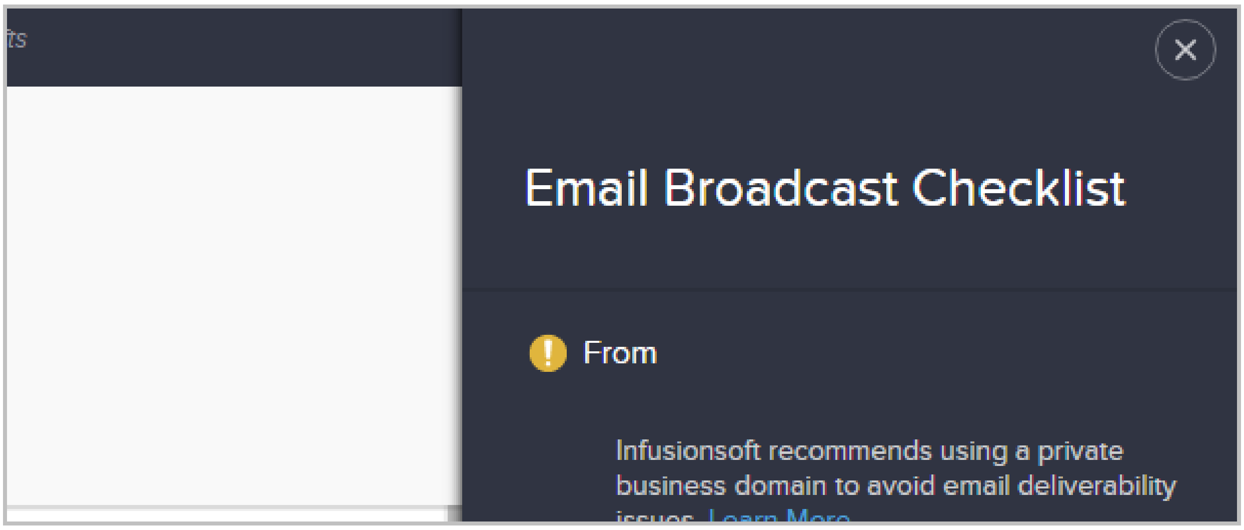
1. (Optional) Click **Save and Exit** to save this email in the Drafts area so you can come back and finish it later



2. Click **Schedule or Send** to View the Email Broadcast Checklist

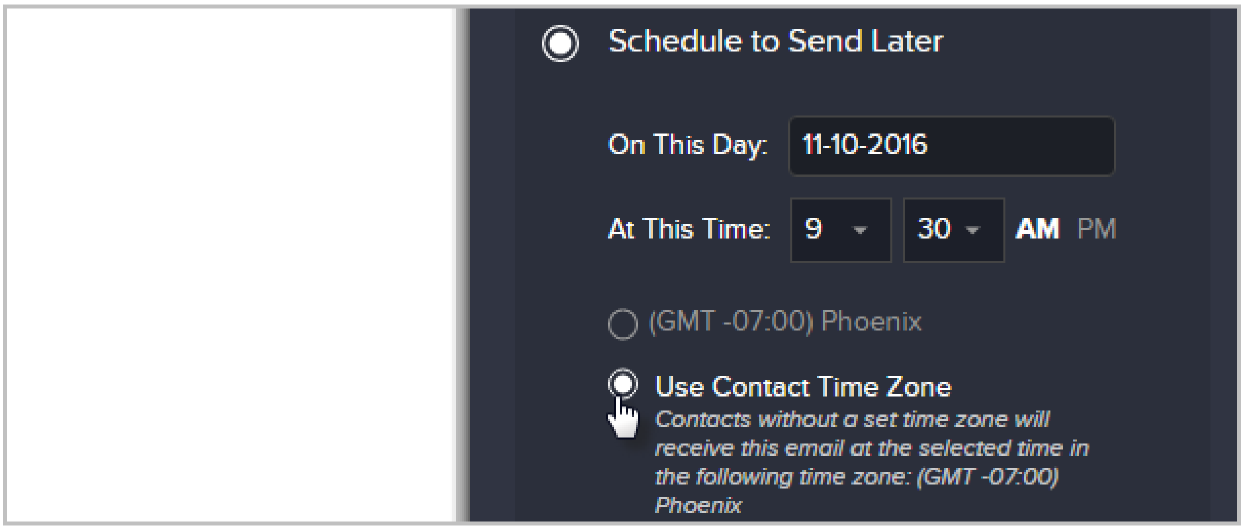


Send with Confidence! The Email Broadcast Checklist will scan your email for errors and suggestions.



When you are ready send, choose:

- **Schedule to Send Later:** You can schedule the email based on *your* time zone or the time zone that is on the customer's contact record .
- **Send Now:** Starts sending the email immediately



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Stop an Email Broadcast

Last Modified on 07/23/2018 2:29 pm MST

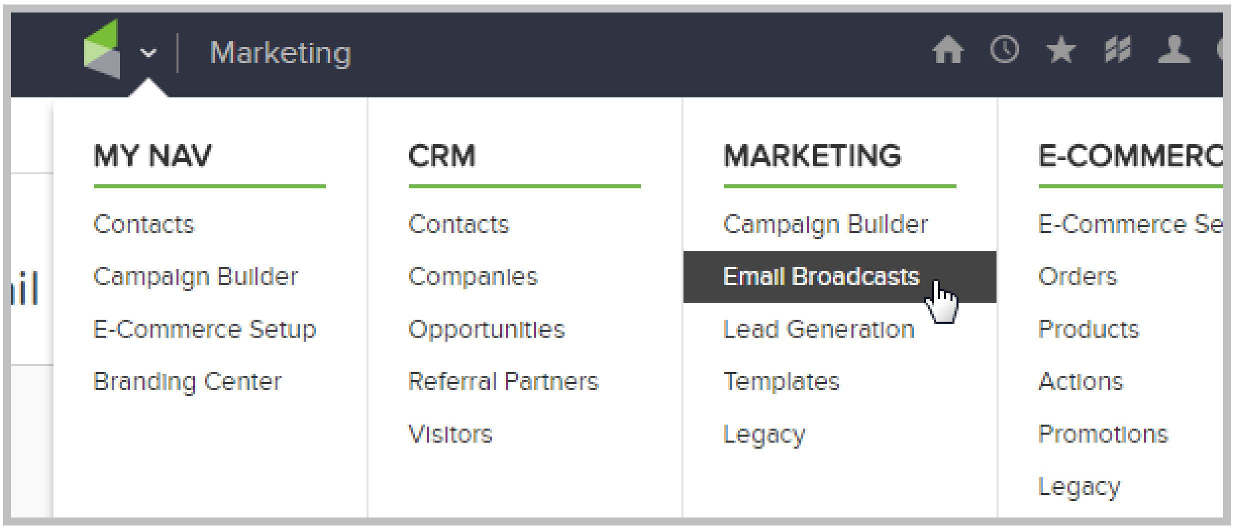
Alert! Modifying an already queued email may not give you the results you desire. When you schedule an email broadcast to be sent at a day and time in the future, it is added to a broadcast queue until that time arrives.

Once the broadcast is scheduled, you cannot:

- Add or remove people from the queued list
- Edit the email template
- Update the day or time

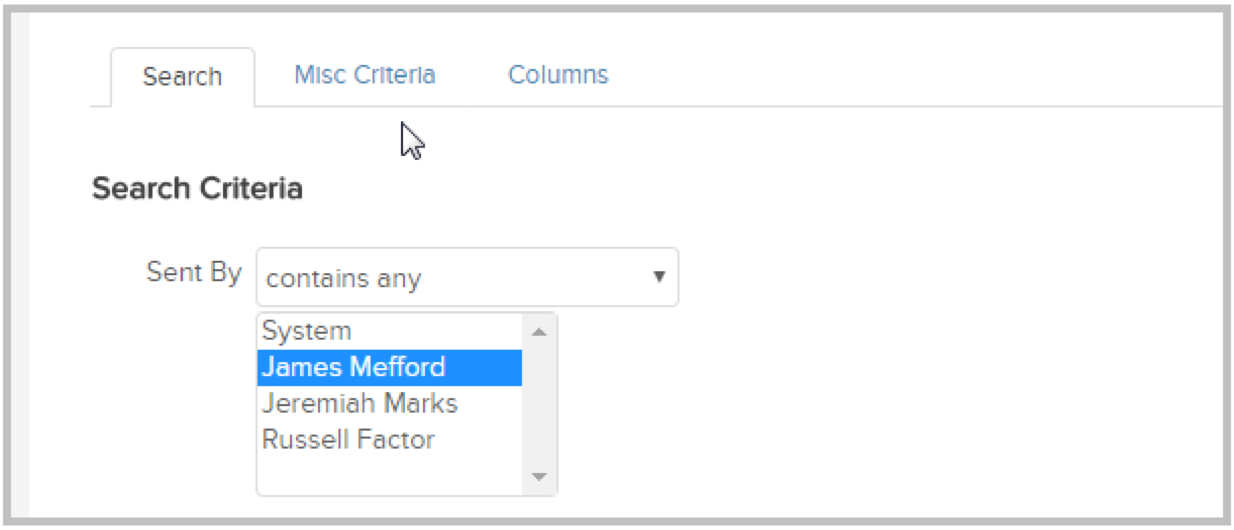
If you need to change any of this information, then you must stop the scheduled broadcast, fix the problem, and then schedule a new broadcast.

1. Navigate to **Marketing > Email Broadcast**



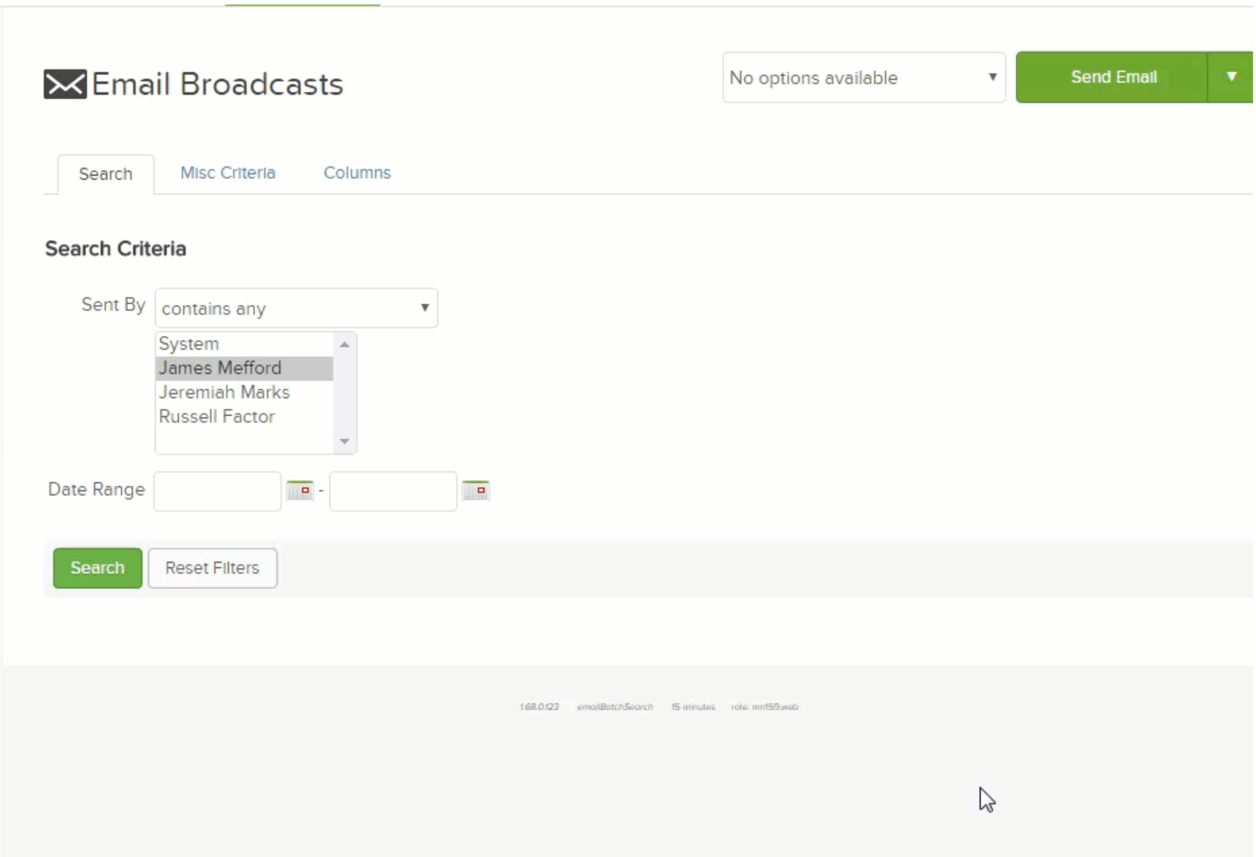
2. Click **New Search** button above the Email Broadcast Report

3. Review the Search Criteria to make sure the correct user(s) are selected from the list. You must select the user who scheduled the broadcast. Hold down the Ctrl key on your keyboard to select more than one user. Note: You only need to select "System" if you want to include follow-up sequence emails in the search results.



4. Click on the **Misc. Criteria** tab

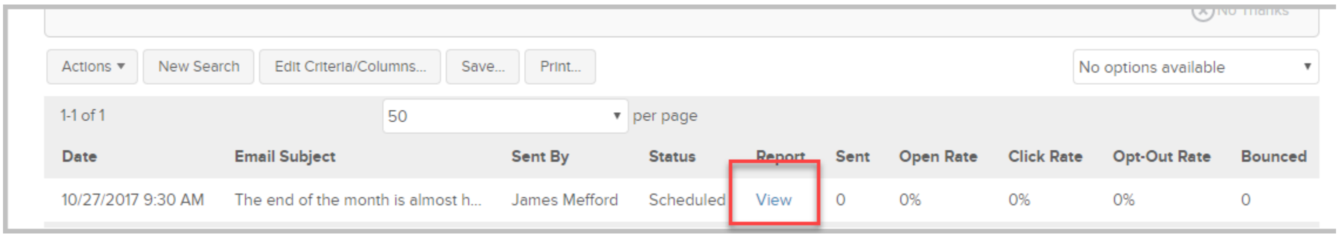
5. Go to the status section and select **Queued** from the status list.
    - Select **Contains Any** from the dropdown.
    - Select **Scheduled** from the status list.



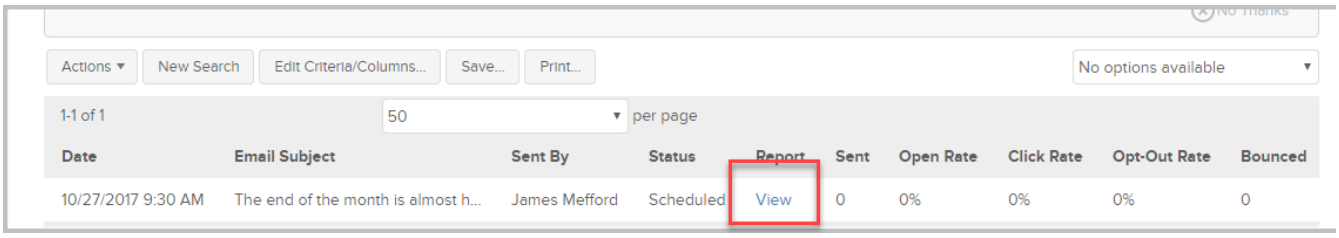
6. Click on the **Search** button to see a list of scheduled broadcasts.

7. Click on **View** to see the broadcast details (i.e. created date, scheduled start date, template name, etc.)

Can't see the View link? If you do not see the "View" link, you need to add this column to the report. Click on the **Edit Criteria and Columns...** button, then click the **Columns** tab. Click the **View Report** item in the Available Fields box on the right. Click the arrow in the middle to move it over to the Custom Columns section. Click **OK**.



8. Go to the **Send Progress** section and click on the **Stop Batch** button to cancel the broadcast. After you stop the broadcast, you can edit the email template or update the list and then schedule a new broadcast.



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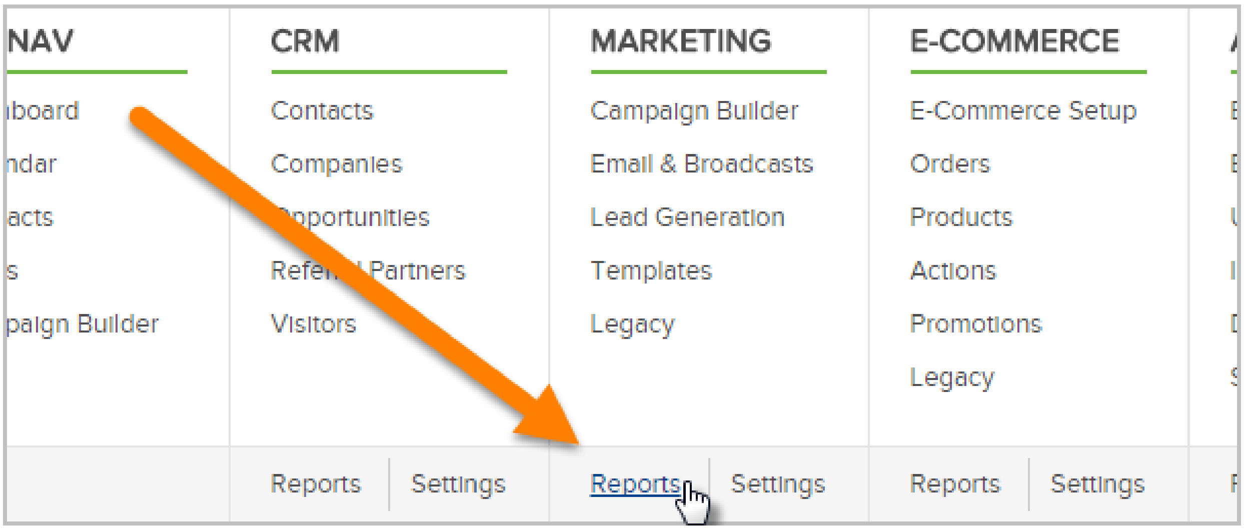
Find Your Scheduled Broadcast Emails

Last Modified on 07/23/2018 2:30 pm MST

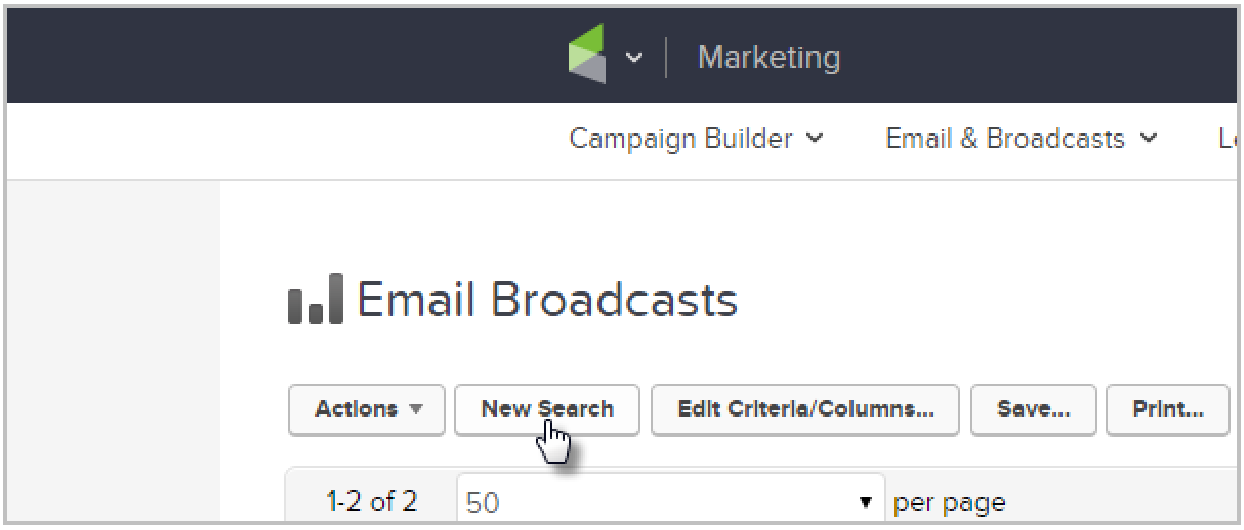
You sent an Email Broadcast and need to find its progress or want to see the results. This article answers where to go to find this out.

1. Go to **Marketing** > **Reports**

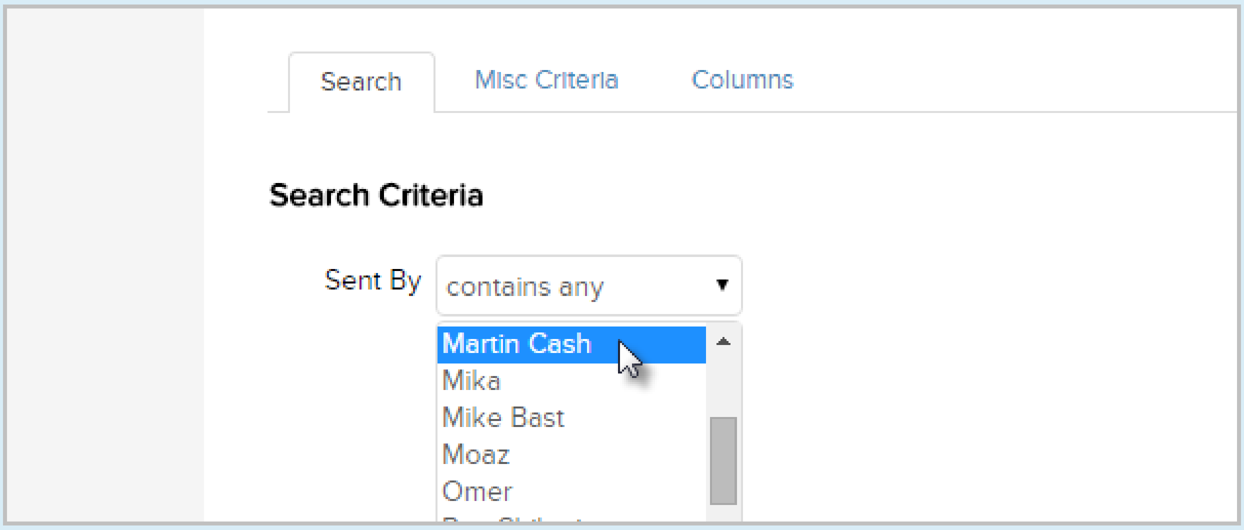


2. Click on **Email Broadcasts**

3. (Optional) You may need to click on the **New Search** button to clear any previous search criteria.

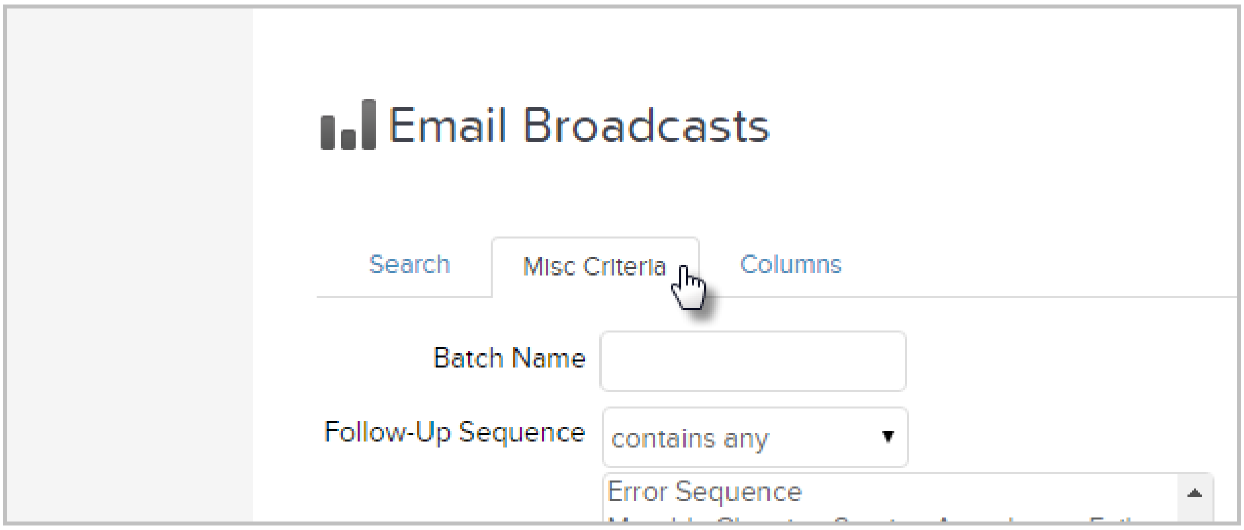


4. Review the Search Criteria to make sure the correct user(s) are selected from the list. You must select the user who scheduled the broadcast. Hold down the Ctrl key on your keyboard to select more than one user.

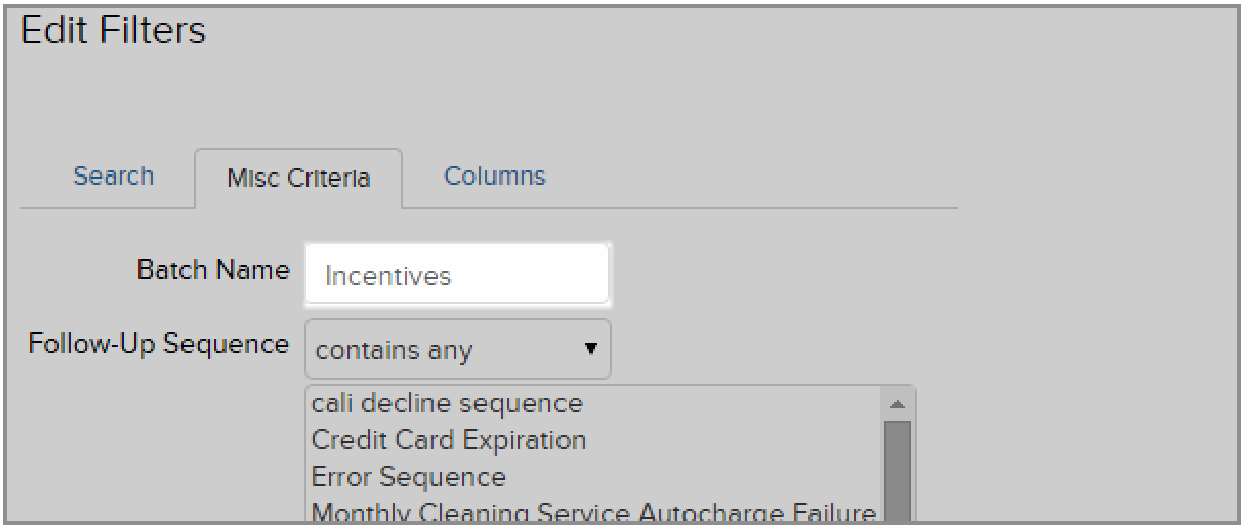


Pro-tip! You only need to select "System" if you want to include follow-up sequence emails in the search results. Suggest not using date range fields to open the search up and find your broadcast easier

5. Click on the **Misc. Criteria** tab

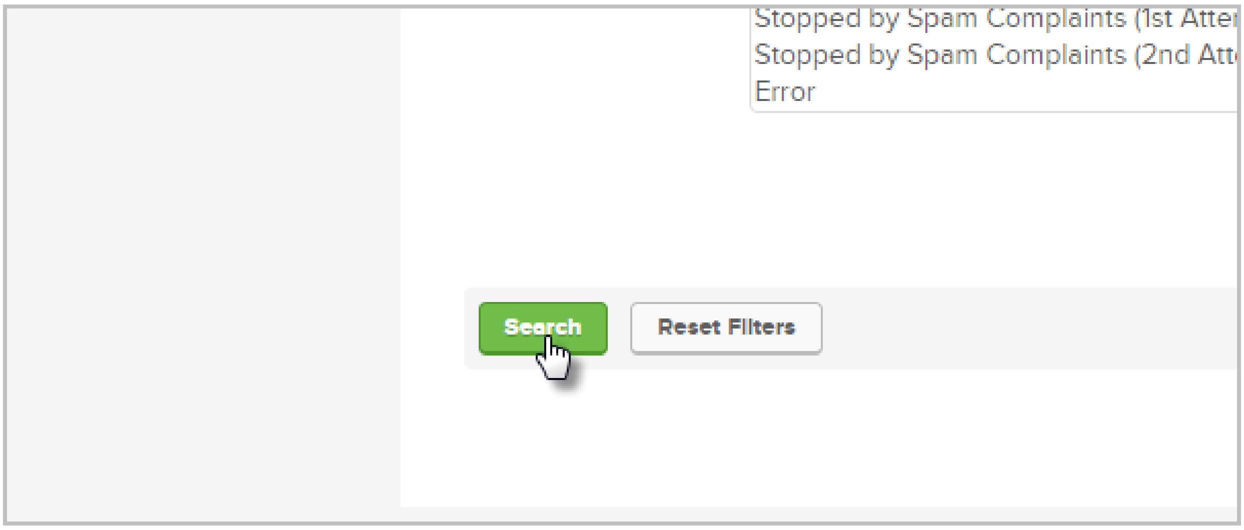


6. (Optional) Search user Broadcast's Subject line. Add the subject line to the "Batch Name" field



7. (Optional) Go to the status section and select **Queued** from the status list.
   - Select **Contains Any** from the dropdown.
   - Select **Scheduling** To find Broadcasts that the system is getting ready to add to the queue
   - Select **Queued** to find only broadcasts that are waiting to send
   - Select **Processing** to find Broadcasts that are currently sending
   - Select **Stopped by user** to find Broadcasts that a user stopped from sending
   - Select **Spam complaints** to find Broadcasts that were stopped due to spam complaints
   - Select **Error** to find Broadcasts that encountered and error

8. Click on the **Search** button to see a list of Broadcasts



9. Click on **View** to see the broadcast details (i.e. created date, scheduled start date, template name, etc.)

Sequence	Template	Status	View Report	Total	Done	Sent	Sk
	Incentive Email	Completed	View	Scheduling	2	2	0
	Incentive Email	Completed	View	Scheduling	11	11	0
	Incentive Email	Completed	View	Scheduling	13	13	0
	Incentive Email	Completed	View	Scheduling	15	15	0

Can't see the View link? If you do not see the "View" link, you need to add this column to the report. Click on the **Edit Criteria and Columns...** button, then click the **Columns** tab. Click the **View Report** item in the Available Fields box on the right. Click the arrow in the middle to move it over to the Custom Columns section. Click **OK**.

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View The Current Status Of A Broadcast

Last Modified on 07/23/2018 2:30 pm MST

You are able to track the status of a broadcast through**Marketing > Reports**.

The email broadcasts report shows you the status of the broadcast emails sent by users or sent automatically through a follow-up sequence. You can view the emails sent by individual users and/or those sent automatically by the system through an action or follow-up sequence. It displays date, status, and summary level delivery statistics (sent, delivered, skip, or error.)

Note: The system will skip the emails that are duplicates, invalid, opted-out, or bounced. To ensure accuracy, the batch status report does not include these email addresses in the total number of emails sent, therefore, the total sent may be less than the number of people on the broadcast list.

Pro-Tip! Open rates are estimates. They are not the best way to measure true engagement. An open rate is recorded for each contact who receives the HTML version of an email and opens it long enough to activate the tracking image in the email. The system is not able to track instances where the recipient has images disabled in their email program or receive the Plain Text version of an email. The system may also record an open when a recipient briefly glances at the email, which is not true engagement. Click through rates are the best measure of email engagement.

1. Go to **Marketing** > **Reports** and click on **Email Broadcasts**
2. Click on **View** to see the details for an individual broadcast
3. Click on a statistic to drill down and view specific segments of the broadcast group (i.e. opened , clicked, bounced, etc.)

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Send A Fax Broadcast

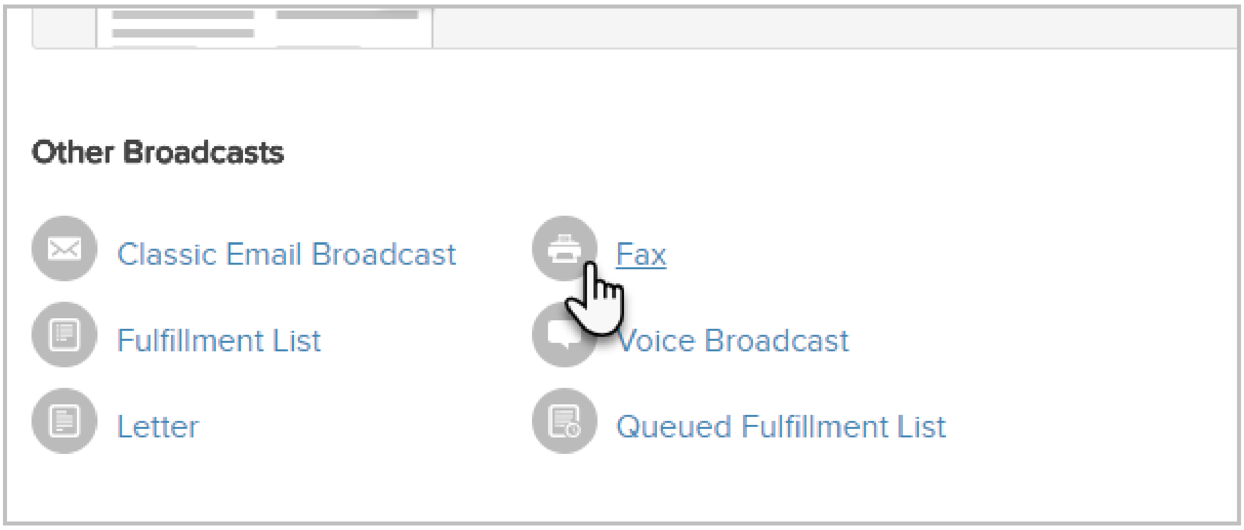
Last Modified on 07/23/2018 2:32 pm MST

You can use the broadcast feature to send a fax to a group of people. Fax broadcasts are sent immediately. If you need to schedule a fax for a specific date, then you must integrate it into a follow-up sequence. There is an additional fee for sending fax broadcasts of 12 cents per page. If you send a three page document, the cost is 36 cents per person. These fees are added to your regular Infusionsoft billing.

Privacy Warning! Faxes are a permission based marketing tool. You must obtain permission from individuals or businesses before sending them automated faxes. Review the Infusionsoft acceptable use policy .

1. Go to **Marketing** > **Emails & Broadcasts**

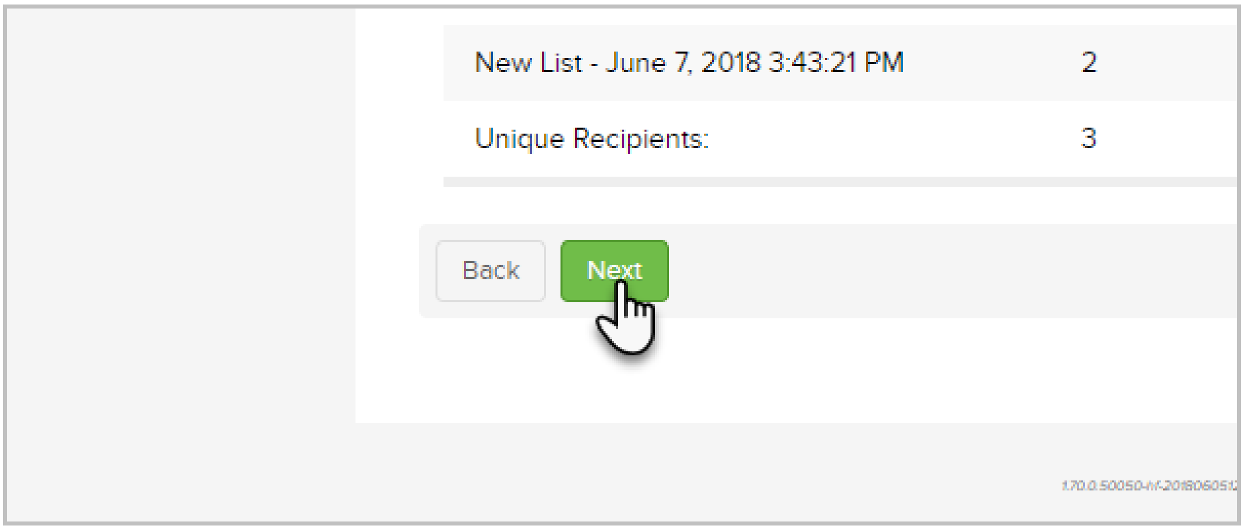
2. Click on the **Fax** icon



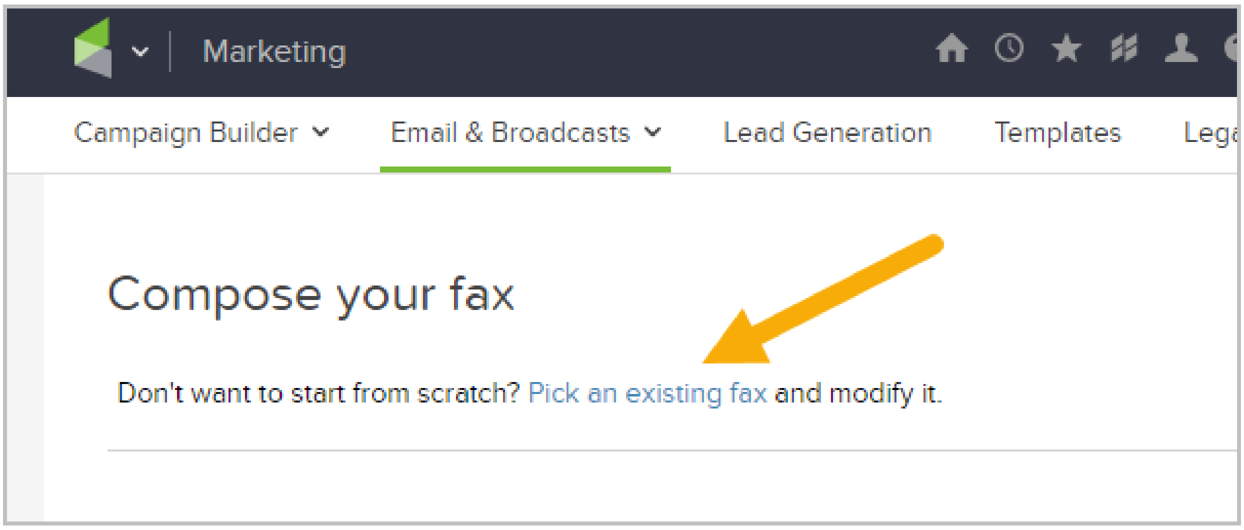
3. Select the recipients:
    - **Saved Search**: Select a list of contacts from the drop-down. If you frequently broadcast to a specific list of contacts, you should create a saved search for that list.
    - **New Search**: Click on the new search link to create a new list of contacts. This list is temporary, it is not going to be a saved search.

- **Quick Add:** Add a new contact if you find someone missing from the saved search or new search lists.
- **Import:** Import a new list if the contacts you need are not already in Infusionsoft.

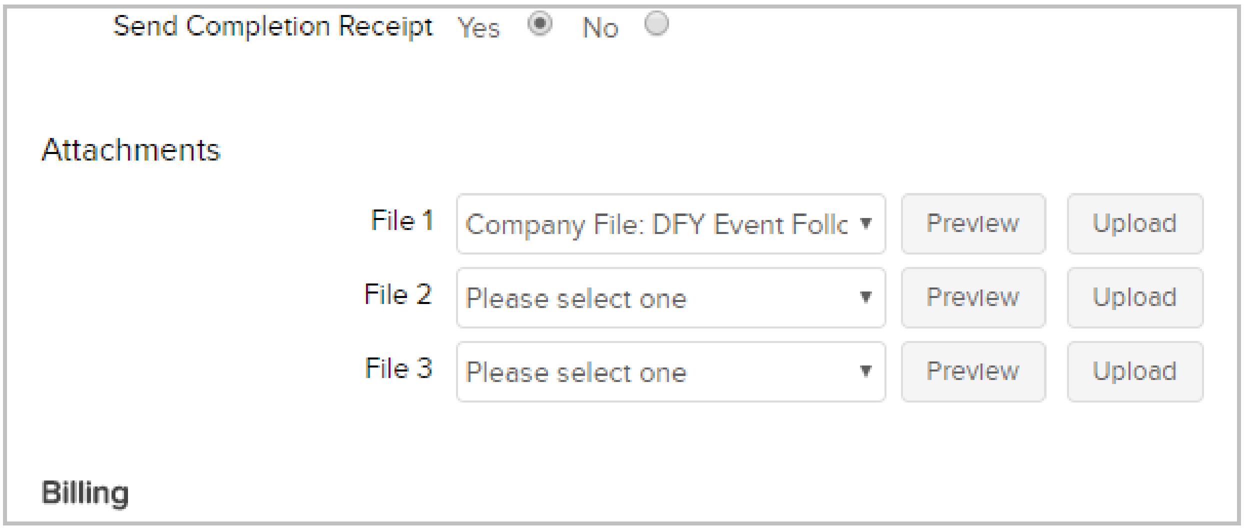
4. Click **Next**



5. If you've previously sent a fax, you can select a previous fax and use it as a template



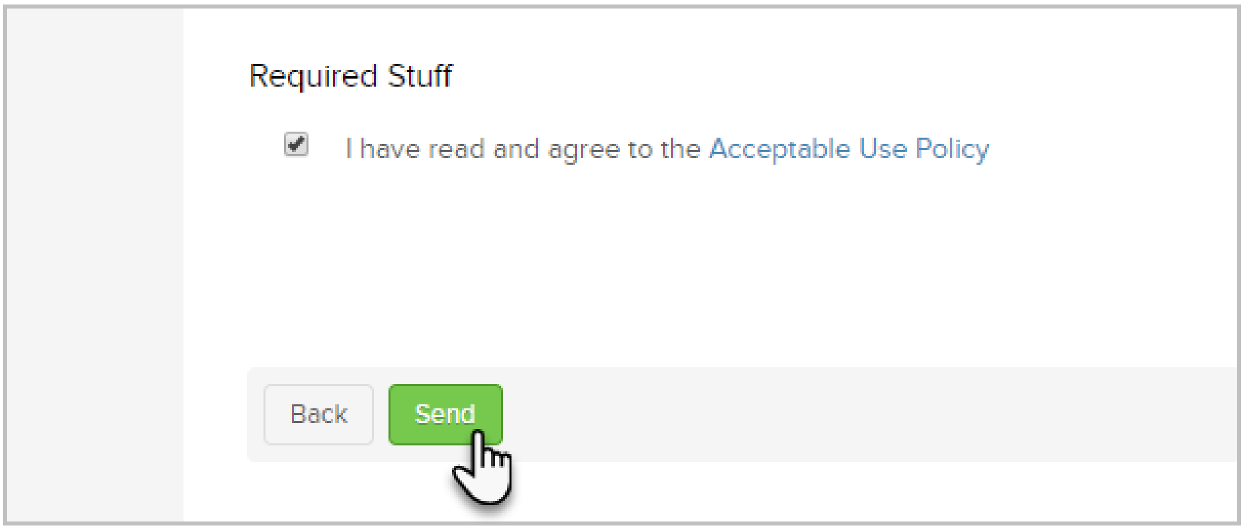
6. If you're starting from scratch, upload the document you wish to fax. Documents can have multiple pages, but **be aware that you are changed per page.** At the time of this writing, fax fees are **$0.12** per page.



7. Once you have your documented uploaded, click **Send Test** to send the fax to yourself. Note: You must have a valid fax number in your user record. Fax fees will apply.

8. Click on the Acceptable Use Policy link to read the policy, then mark the checkbox to confirm you are in compliance.

9. Click on **Send** to send the fax.



10. Go to **Marketing** > **Reports** and click on **Fax Batch Status** to view the status of your fax.

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Email Broadcast Reports

Last Modified on 07/30/2018 3:14 pm MST

There are several marketing reports that will help you evaluate email marketing effectiveness. To see these reports, go to **Marketing > Reports** in the master navigation menu.

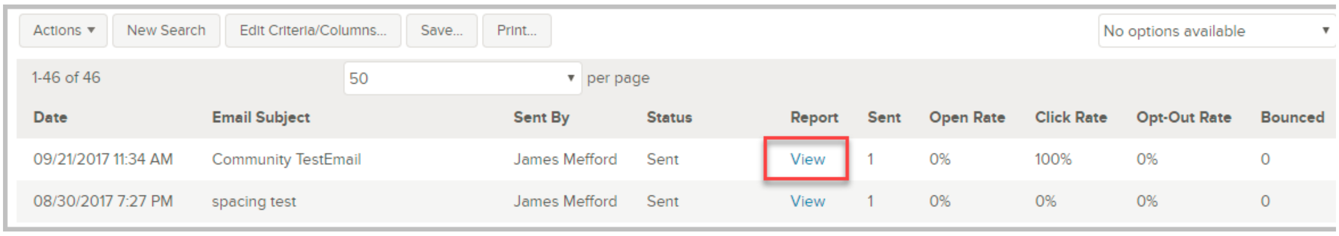
Email Broadcasts Report

The Email Broadcasts report shows you the status of broadcast emails sent by users or sent automatically through campaigns. It displays date, status, and summary level delivery statistics (sent, delivered, skip, or error.)

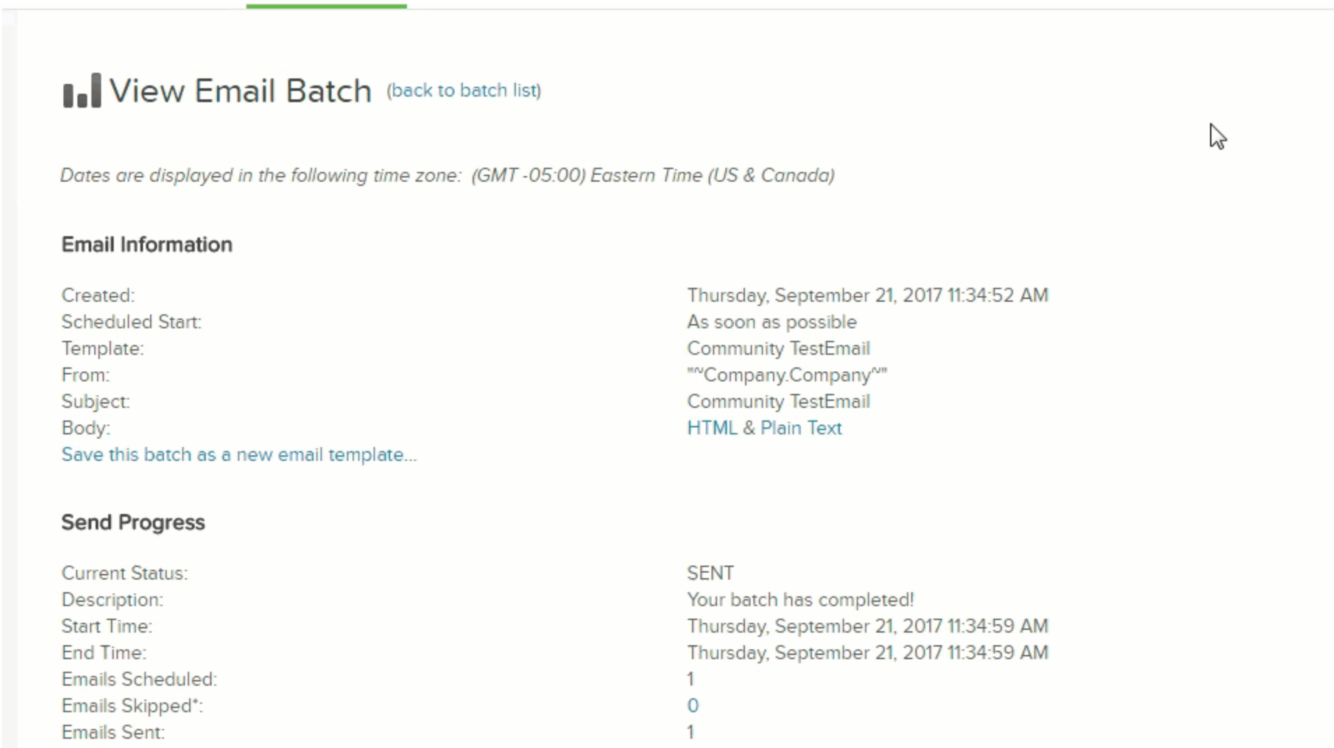
Skipped Emails: The system will skip emails that are duplicates, invalid, opted-out, or bounced. To ensure accuracy, the batch status report does not include these email addresses in the total number of emails sent, therefore, the total sent may be less than the number of people on the broadcast list.

Pro Tip! Open rates are estimates, and are not the best way to measure true engagement. An open rate is recorded for each person who receives the HTML version of an email and opens it long enough to activate the tracking image in the email. The system is not able to track instances where the recipient has images disabled in their email program or receive the plain text version of an email. The system may also record an open when a recipient briefly glances at the email, which is not true engagement. Click through rates are the best measure of email engagement.

1. Click on **View** to see the details for an individual broadcast.



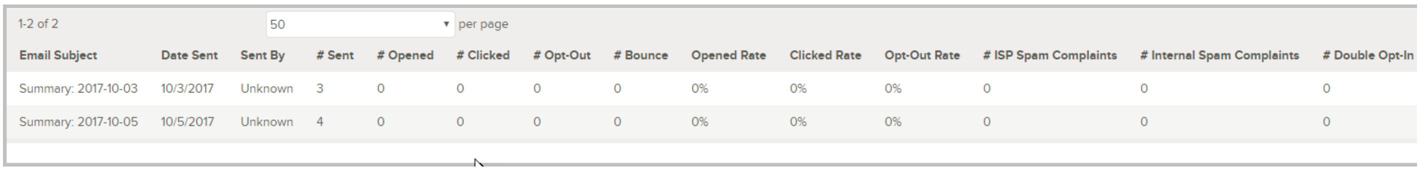
2. Click on a statistic to view a specific segment of the broadcast group (i.e. opened , clicked, bounced, etc.)



3. You can also view broadcast email statistics by adding the**Email Stats** widget to your home page dashboard.

Email Broadcast Conversion Summary

The email broadcast conversion summary report displays a statistical summary on a per-broadcast basis. It displays the number of emails sent, opened, clicked, opt-out, bounce, spam complaints, and double opt-ins.


1-2 of 2 | 50 per page

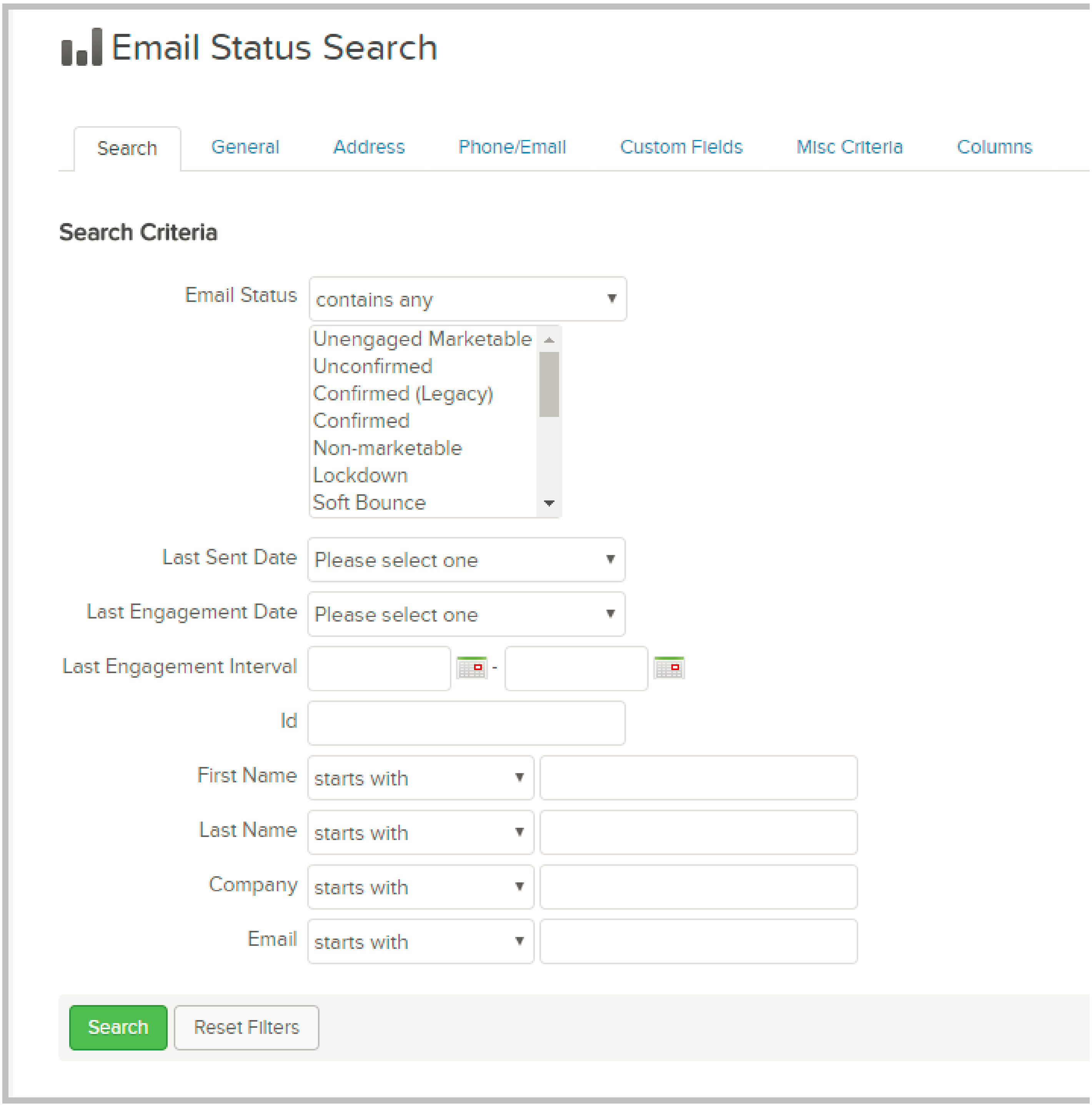
Email Subject	Date Sent	Sent By	# Sent	# Opened	# Clicked	# Opt-Out	# Bounce	Opened Rate	Clicked Rate	Opt-Out Rate	# ISP Spam Complaints	# Internal Spam Complaints	# Double Opt-In
Summary: 2017-10-03	10/3/2017	Unknown	3	0	0	0	0	0%	0%	0%	0	0	0
Summary: 2017-10-05	10/5/2017	Unknown	4	0	0	0	0	0%	0%	0%	0	0	0

Click Through Percentage Search

The click through percentage search helps you identify the most engaged email recipients. It displays click through statistics on a per-person basis. You can filter this search by percentage range, number of emails sent, number of emails clicked, tags, and more.

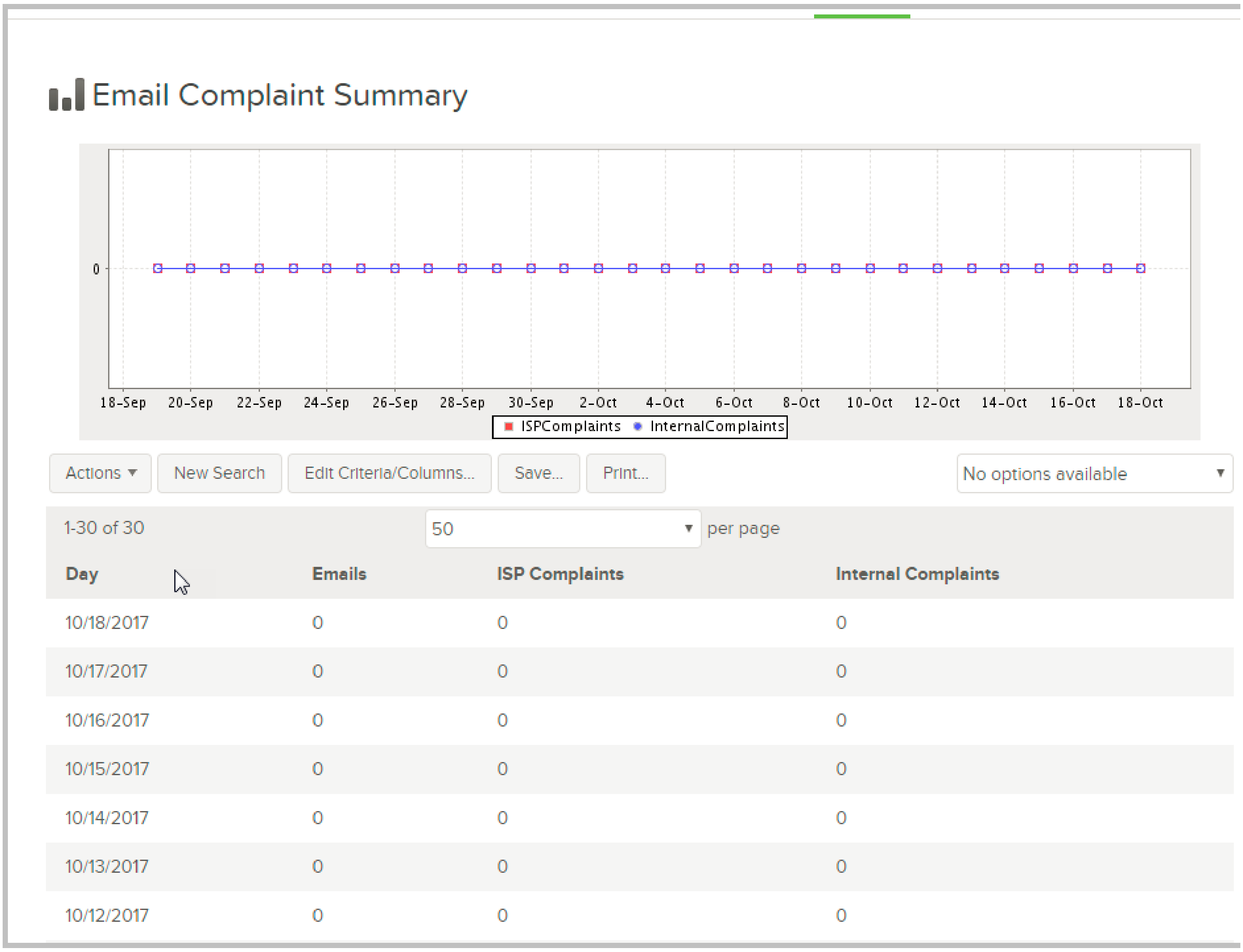
Email Status Search

The email status search report displays a list of people based on the status of their email address (i.e. bounce, opt-in, opt-out, etc.). You may use this search to clean up your database or to follow up with people who have bad email addresses in your system. Search by multiple criteria, including email status, last sent date, tags, and more. Click on Opt Status to view additional details.



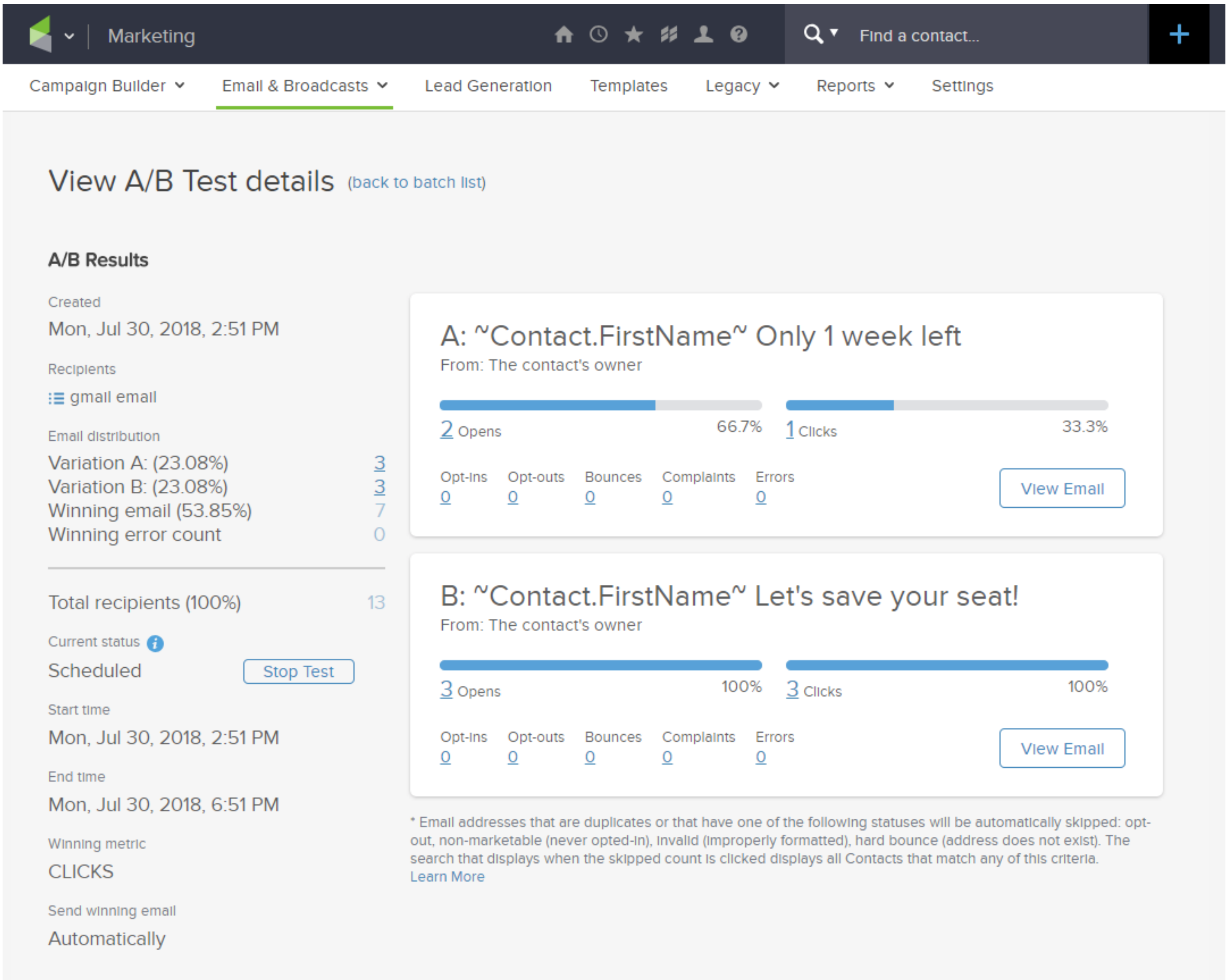
Email Complaint Summary

Use the email complaint summary report to monitor email complaints generated when someone clicks on the SPAM button in their email client (ISP Complaints) or when they opt out of your email marketing (Internal Complaints). You must keep your complaint rate below .01% (1 per thousand emails) to comply with the Infusionsoft acceptable use policy and the CAN-SPAM Act. This report helps you monitor and manage email complaint issues right away.



Email Broadcast A/B Testing Results

The Broadcast Report pages will help you understand your results of your A/B Test.



Marketing
Find a contact...
Campaign Builder
Email & Broadcasts
Lead Generation
Templates
Legacy
Reports
Settings
View A/B Test details (back to batch list)
A/B Results
Created
Mon, Jul 30, 2018, 2:51 PM
Recipients
gmail email
Email distribution
Variation A: (23.08%) 3
Variation B: (23.08%) 3
Winning email (53.85%) 7
Winning error count 0
Total recipients (100%) 13
Current status
Scheduled
Stop Test
Start time
Mon, Jul 30, 2018, 2:51 PM
End time
Mon, Jul 30, 2018, 6:51 PM
Winning metric
CLICKS
Send winning email
Automatically
A: ~Contact.FirstName~ Only 1 week left
From: The contact's owner
2 Opens 66.7%
1 Clicks 33.3%
Opt-ins 0
Opt-outs 0
Bounces 0
Complaints 0
Errors 0
View Email
B: ~Contact.FirstName~ Let's save your seat!
From: The contact's owner
3 Opens 100%
3 Clicks 100%
Opt-ins 0
Opt-outs 0
Bounces 0
Complaints 0
Errors 0
View Email
* Email addresses that are duplicates or that have one of the following statuses will be automatically skipped: opt-out, non-marketable (never opted-in), invalid (improperly formatted), hard bounce (address does not exist). The search that displays when the skipped count is clicked displays all Contacts that match any of this criteria.
Learn More

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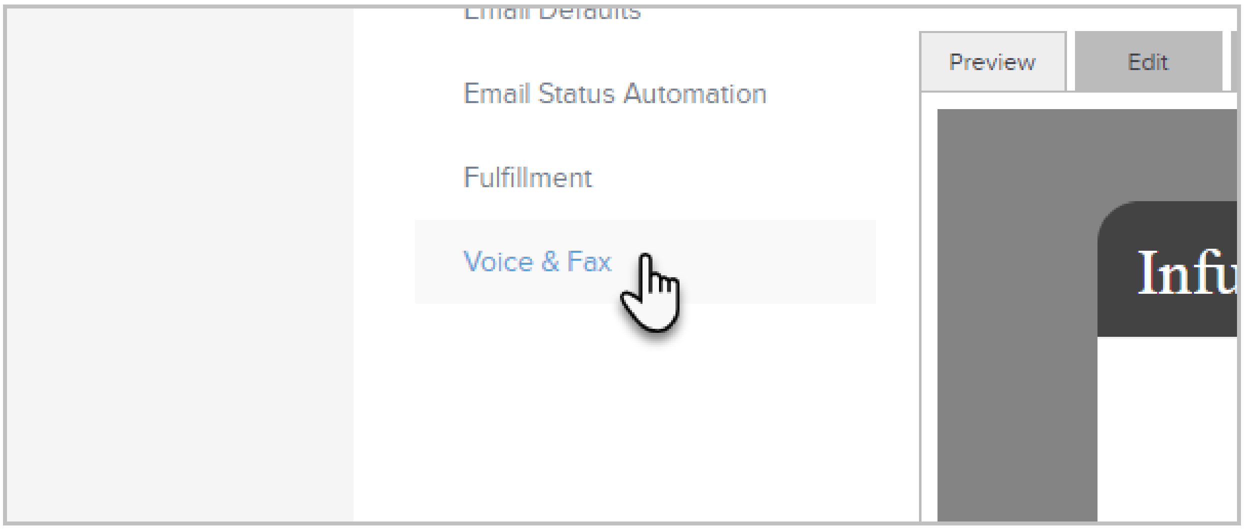
Send A Voice Mail Broadcast

Last Modified on 07/23/2018 2:31 pm MST

We integrate with a cloud based technology (CallFire) so you can send a recorded messages to a group of people in your Infusionsoft database. Voice broadcasts are sent same day (not on a scheduled date), but you can limit the message to specific hours (so you don't wake someone up in the middle of the night!). The times are in US / Eastern Standard Time. There is an additional charge of 15 cents per minute for each contact dialed. If you send a two minute message, then the cost per contact is 30 cents. This fee is added to your regular Infusionsoft billing.

Get Permission! Voice broadcasts are a permission-based marketing tool. All Infusionsoft users must comply with the U.S. FTC regulations and obtain permission from individuals before sending them voice broadcast messages. Review the Infusionsoft acceptable use policy.

1. Go to **Marketing** > **Settings**
2. Click on **Voice & Fax** at the bottom left of the page

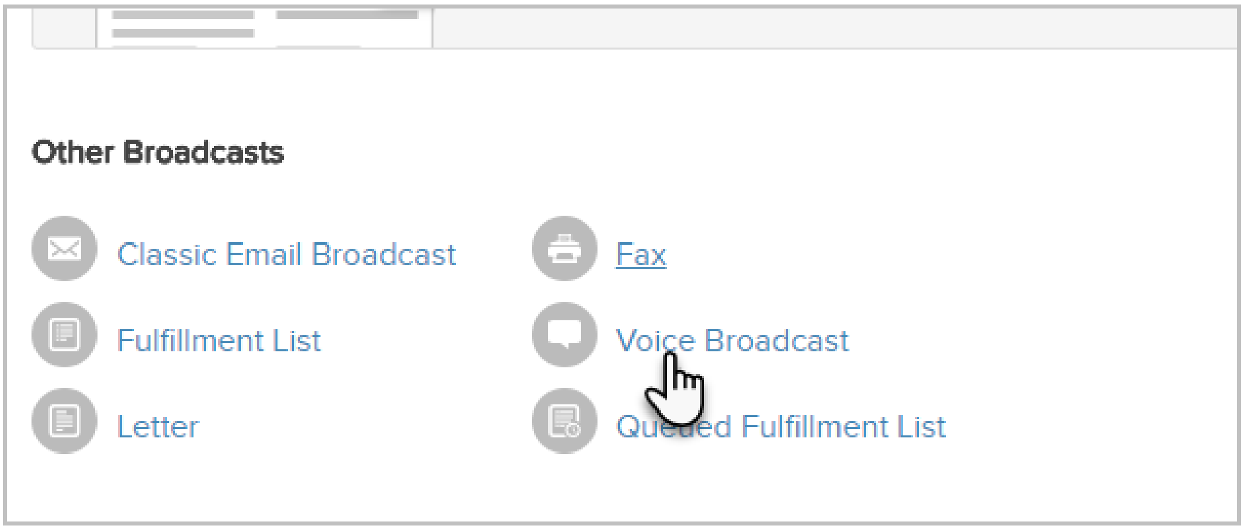


3. Enter a valid phone number with country code + area code + local number (e.g. 1 (480) 555-1234). The U.S. country code is 1. This number will show up on caller ID.

4. Click **Save**

5. Go to **Marketing > Email & Broadcasts**

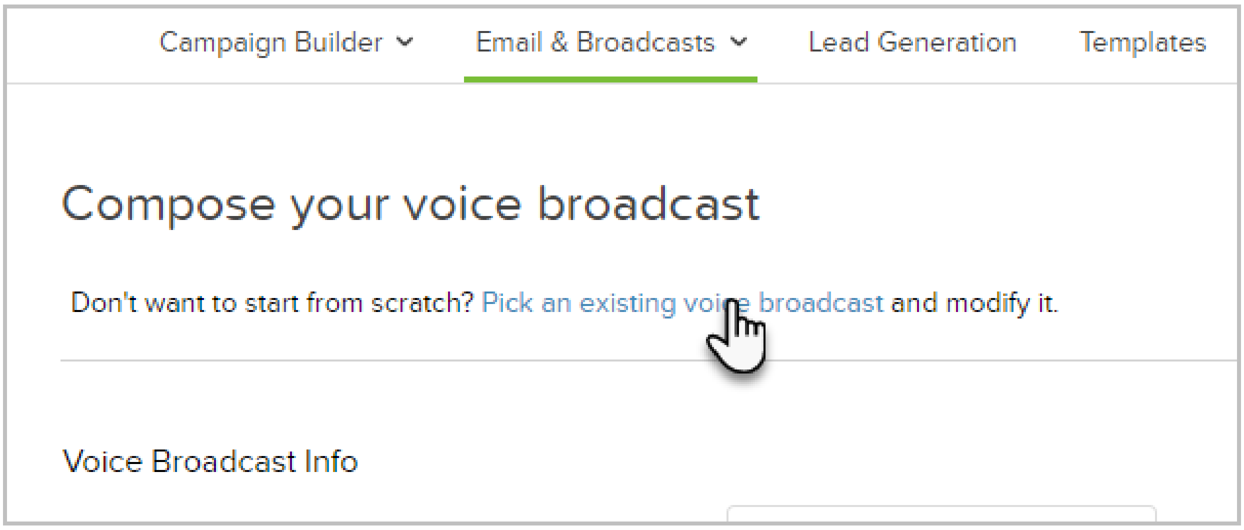
6. Click on **Voice Broadcast**



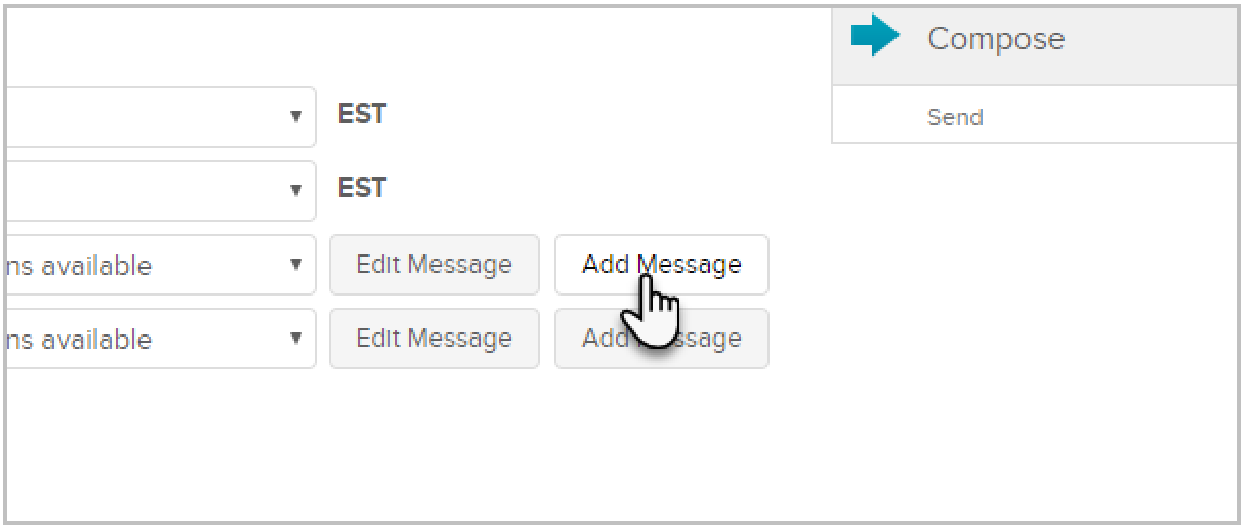
7. Select the recipients:
   - **Saved Search:** Select a list of contacts from the dropdown. If you frequently broadcast to a specific list of people, you should create a saved search for that list.
   - **New Search**: Click on the new search link to create a new list of people. This list is temporary, it is not going to be a saved search.
   - **Quick Add**: Add a new contact if you find someone missing from the saved search or new search lists.
   - **Import**: Import a new list if the contacts you need are not already in Infusionsoft.

8. Click **Next**

9. If you've already created a voice broadcast, you can use it as a template for the current voice broadcast. Just click the **Pick an existing voice broadcast** link at the top of the page.



10. To create a brand-new voice message
    1. Choose a scenario (whether a machine or human answers) and click the **Add Message** button.



    2. Enter a short, descriptive name for the message. This is an internal name.

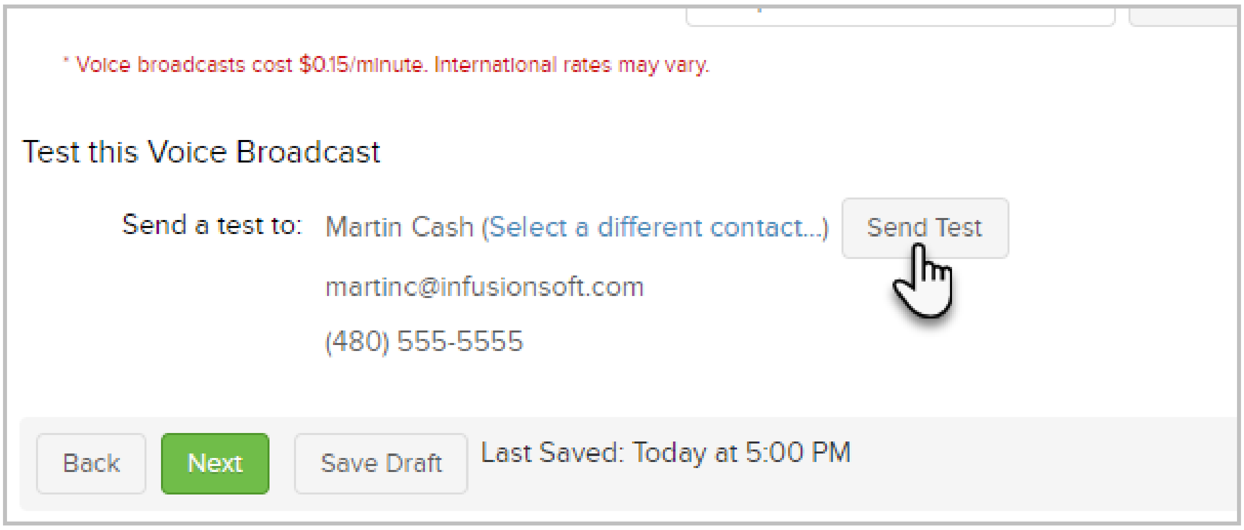
    3. Enter your phone number and click on **Call Me.**

    4. Pick up the phone when it rings the number you entered above. You'll hear, "You have reached the Infusionsoft Message Recording Service. Please press 1 to get started."

    5. Press 1 to record your message. **Begin the recording by instructing the recipient to press 8 to remove themselves from your call list - this is federal law.**

    6. Save the message or replay it. The message will be saved for future use.

11. (Optional) Click **Send Test** to send the voice broadcast to yourself. Note: You must have a valid phone number in your user record. Voice broadcast fees will apply. Note that you can also select a different person to test other than yourself.



12. Click on the **Acceptable Use Policy** link to read the policy, then mark the checkbox to confirm you are in compliance.

13. Click on **Done** to send the voice broadcast today, during the scheduled hours.

14. Go to **Marketing** > **Reports** > **Voice Batch Status** to view the status of the voice broadcast.

Using a different version of Infusionsoft? Click Here to learn more

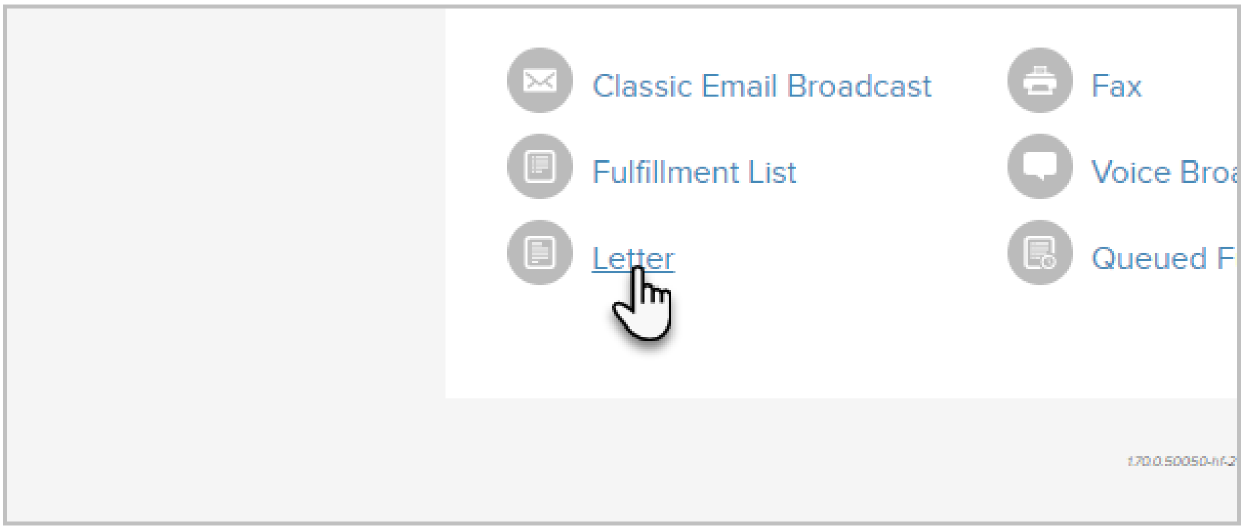
Create A Physical Letter Broadcast

Last Modified on 07/23/2018 2:32 pm MST

A letter broadcast is simply a way to manually create a letter fulfillment job for a list of people.

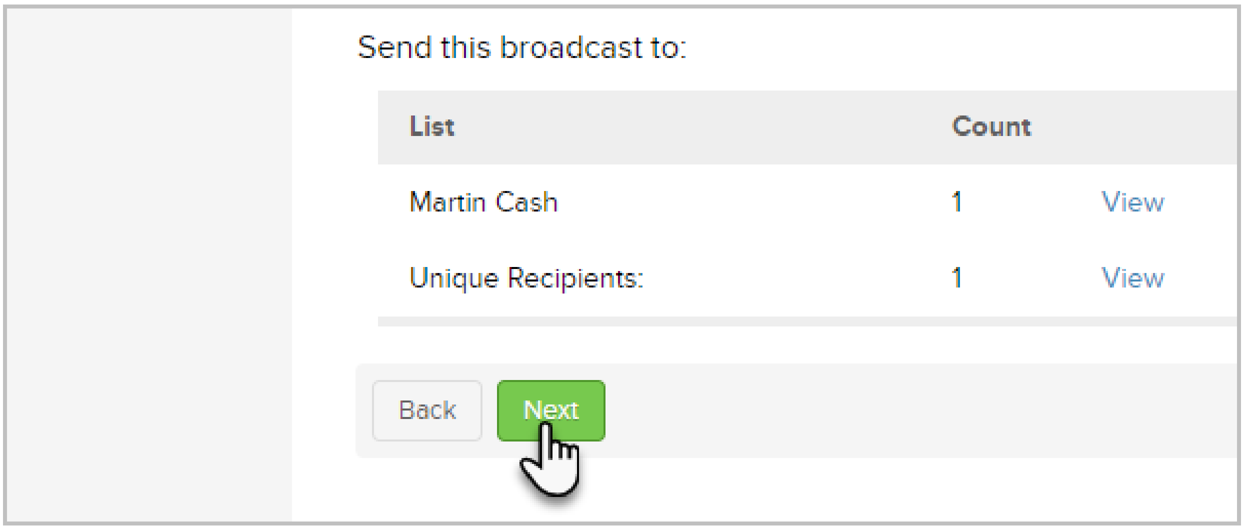
1. Go to **Marketing** > **Email & Broadcasts**

2. Click on the **Letter** link at the bottom

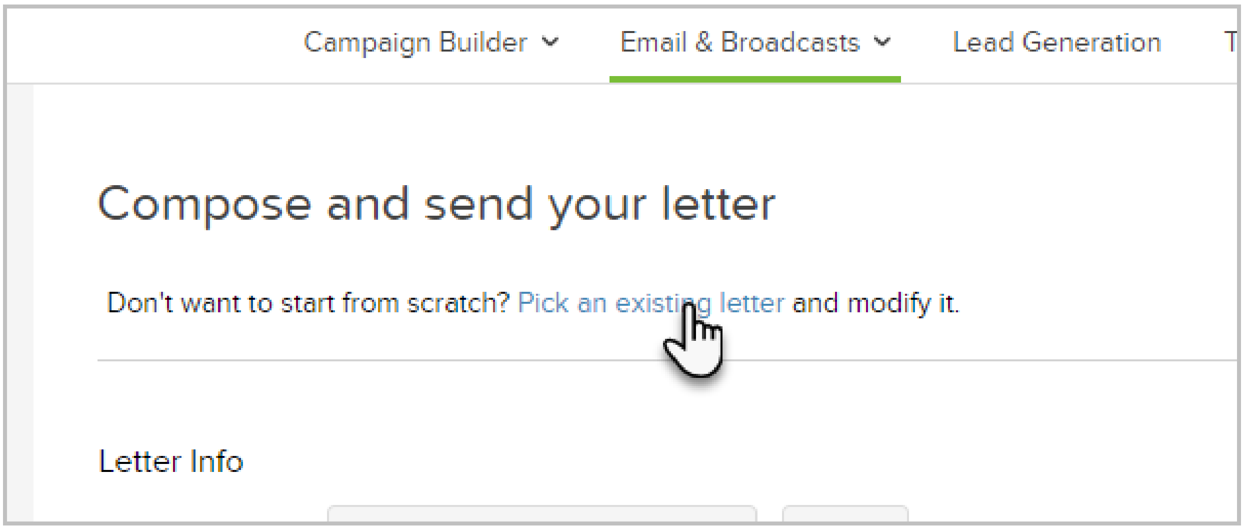


3. Select the contacts...
   - **Saved Search:** Select a list of people from the drop-down. If you frequently broadcast to a specific list of contacts, you should create a saved search for that list.
   - **New Search:** Click on the new search link to create a new list of people. This list is temporary, it is not going to be a saved search.
   - **Quick Add:** Add a new contact if you find someone missing from the saved search or new search lists.
   - **Import:** Import a new list if the people you need are not already in Infusionsoft.

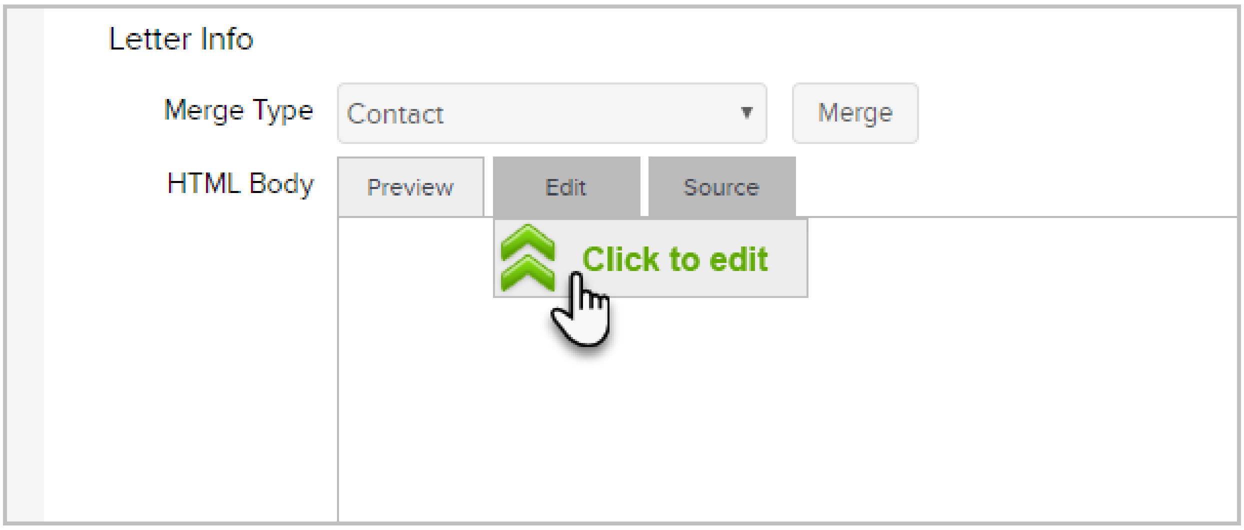
4. Click on the **Next** button.



5. If you've created a letter previously, you can select it as a starting template

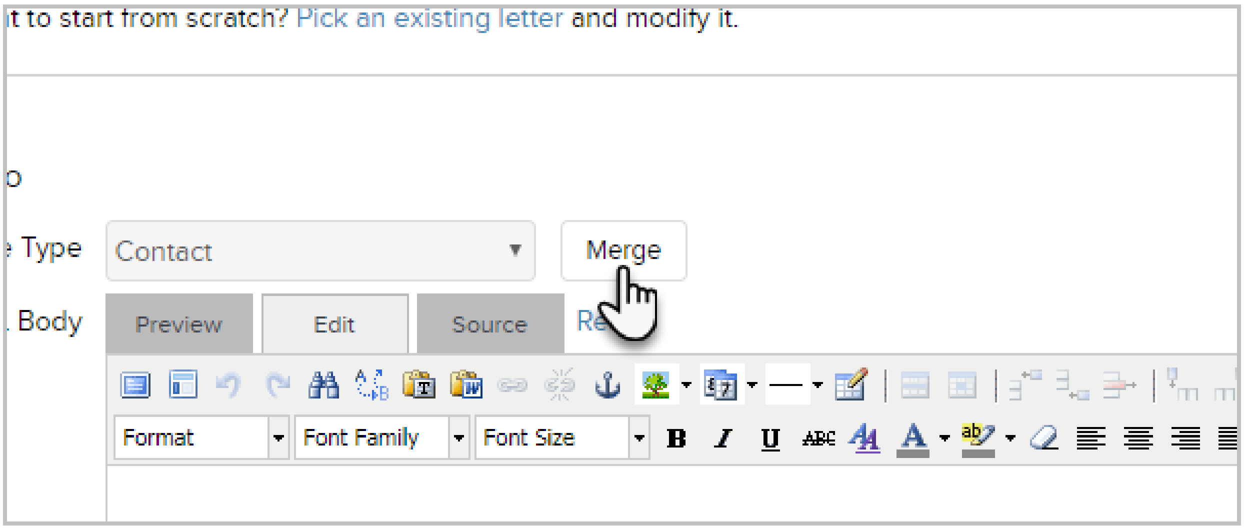


6. Click the **Edit** button to begin creating the document

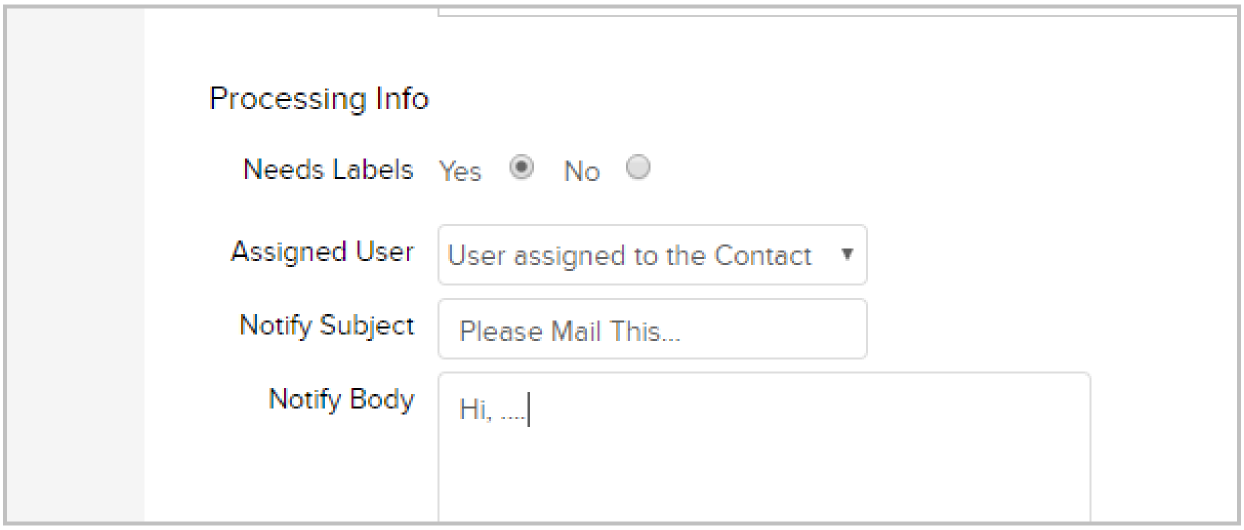


7. Note that you can merge-in contact details by clicking the merge button and choosing a

field to merge in.



8. Set up the notification message and choose the system user that will be fulfilling on this. Be sure to select, Needs Labels and you will be able to print Avery® labels for each letter.



9. Click on the **Done** button to send the responsible user an email notification and create the letter job on the fulfillment widget home page dashboard.

Why Some Emails Skip During A Broadcast

Last Modified on 07/23/2018 2:32 pm MST

When you send a broadcast email through Infusionsoft, the system will skip certain email addresses because of their status. These email addresses are removed from the broadcast group before the email is sent. This reduces the size of the sending list, but speeds up the send rate. You will see the number of emails skipped on the email broadcasts report. You can click the link number of skipped on the report and view all skipped records. This report appears as the last step of the broadcast process, and can be accessed later through **Marketing** > **Reports** > **Email Broadcasts**.

These email addresses are skipped prior to broadcast...

Duplicate Email Addresses

You may have duplicate email addresses in your list if:

- Your web forms allow duplicate contact records to be created
- You seldom check for duplicate records and merge them to keep your database clean

Your list numbers may not be accurate if you are allowing duplicate records to accumulate in your system. Infusionsoft does not delete the record with the duplicate email address, it just skips it when sending a broadcast email. You can resolve this problem by regularly checking for duplicates and merging them.

Hard Bounces

If an email address hard bounces, it is no longer valid. Hard bounces occur when someone uses an email address for a time, and then closes it down. This is a permanent issue. You can resolve this issue by searching for hard bounce email addresses using the email status search under Marketing > Reports > Email Status Search. You can resolve hard bounce email addresses by contacting the person directly to request a new email address. You can set up actions that adjust tags and /or alert you about hard bounces at Marketing > Settings > Email Status Notification.

Invalid Email Addresses

Email addresses are designated as "Invalid" if they are not properly formatted. This means they do not have the characteristics of a valid email address, like @, .com, .net, etc. Invalid email addresses happen when someone leaves out part of their email address when they fill out a form or when a form is submitted by a robot instead of a human. If you suspect an invalid email address belongs to a valid person, you may be able to correct the typo yourself or contact the person to confirm the valid email address. If you have a large number of invalid email addresses that were most likely auto-submitted by a robot, you can add the CAPTCHA code snippet to your drag & drop web form. This snippet confirms that a human is filling out the form.

Opt-Outs (Unsubscribes)

When someone unsubscribes from your email marketing, you can no longer send broadcast or follow-up sequence emails to them. The person will still show up in your searches if they meet the search criteria, but the system will skip them when sending broadcasts or follow-up sequence emails. If you automatically want to remove tags, you can set up an opt-out email trigger or actions on a custom opt-out link (Marketing > Settings > Automation Links) Note: You are still able to send these people individual one-off emails.

Reported Spam

When someone reports an email as spam during the unsubscribe process or by clicking on Spam in their email client (i.e. AOL), you can no longer send broadcast or follow-up sequence emails to them. The person will stills show up in your searches if they meet the search criteria, but the system will skip them when sending broadcasts or follow-up sequence emails. You should review complaints regularly to identify the root cause so you can change your practices to reduce or eliminate spam complaints.

You can search for emails by status (hard bounce, invalid, opt-out, reported spam, provided feedback) using the email status search (**Marketing** > **Reports** > **Email Status Search.**)

Using a different version of Infusionsoft? Click Here to learn more

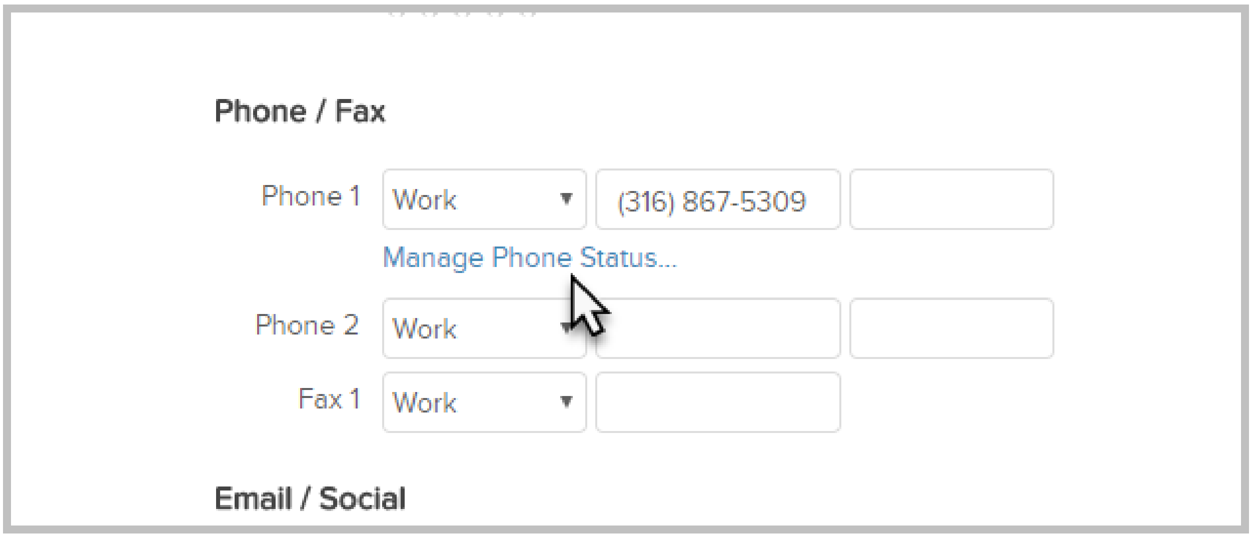
Prevent Someone From Receiving A Voice Broadcast

Last Modified on 07/23/2018 2:33 pm MST

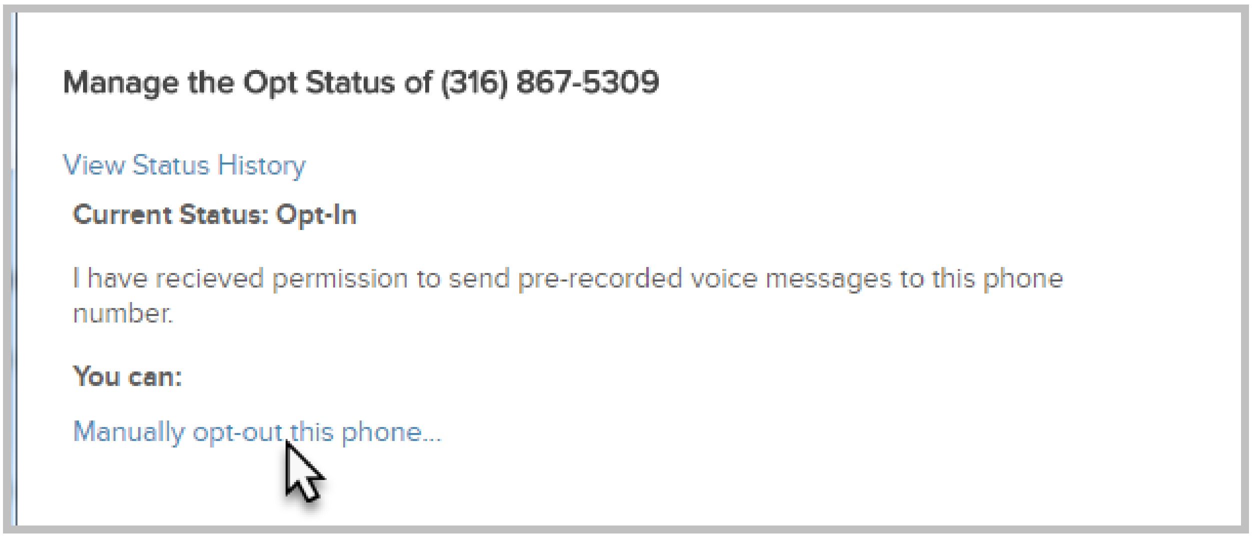
Voice broadcasts are a permission-based marketing tool. When you send a Voice Broadcast as part of a marketing process, the person receiving the voice messages can "opt-out" of your call list. You are required to begin your voice message by telling the recipient to press 8 to be removed from the list. This process is automated and does not require your intervention.

You may occasionally receive these types of requests by phone, email, or in person. You can manually update the opt status to remove (or add) a contact's phone number to your voice broadcast list. When you remove someone from your voice broadcasts, they will continue to receive other forms of marketing messages as long as their email status permits. They will only be opted out of the voice broadcasts.

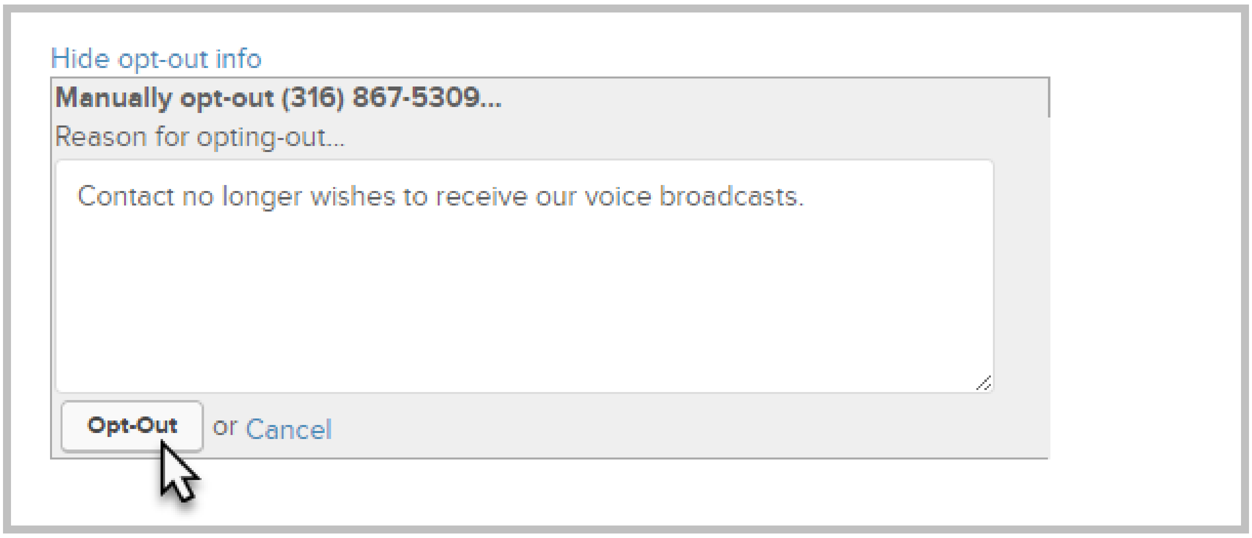
1. Open the Contact Record that you would like to modify.
2. Click on the **Manage Phone Status** link to manually add or remove the person from your voice broadcasts.



3. Click on the **Manually Opt-Out This Phone** link.



4. Enter an Opt-out reason and click the **Opt-Out** button.



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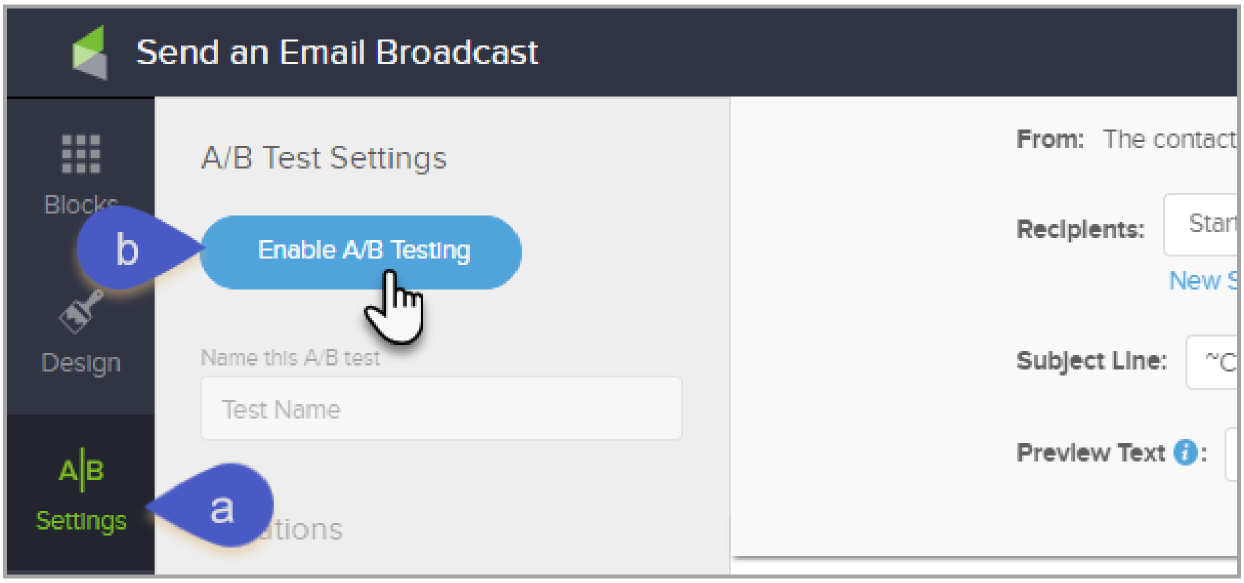
A/B Test Broadcast Emails

Last Modified on 08/07/2018 8:54 pm MST

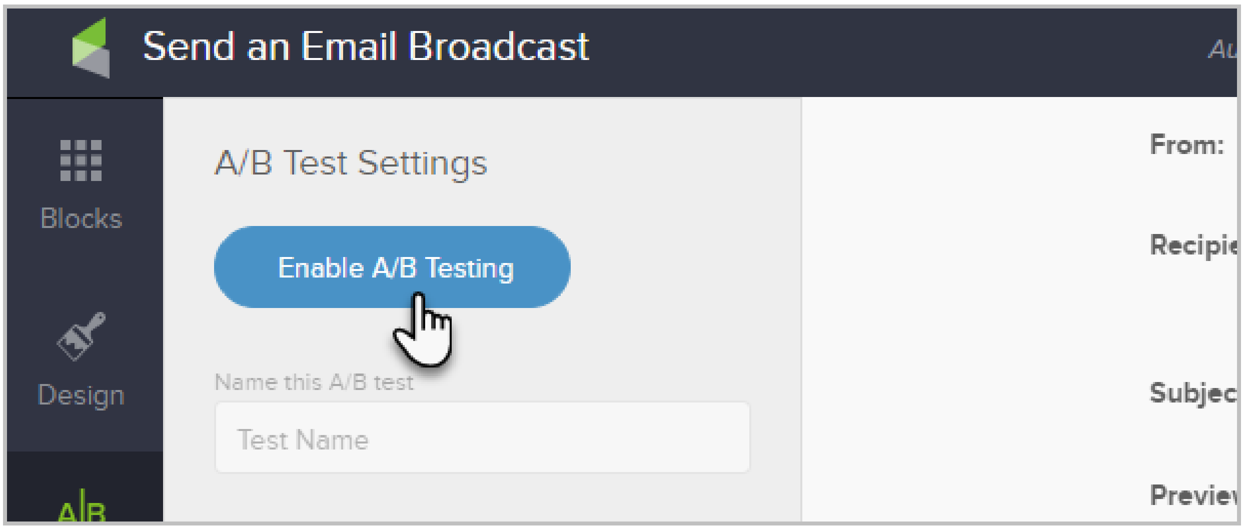
You can convert a broadcast email to a split-test that can test up to 5 email variants.

Note: that currently, split-testing is only available in the Send a Broadcast section.

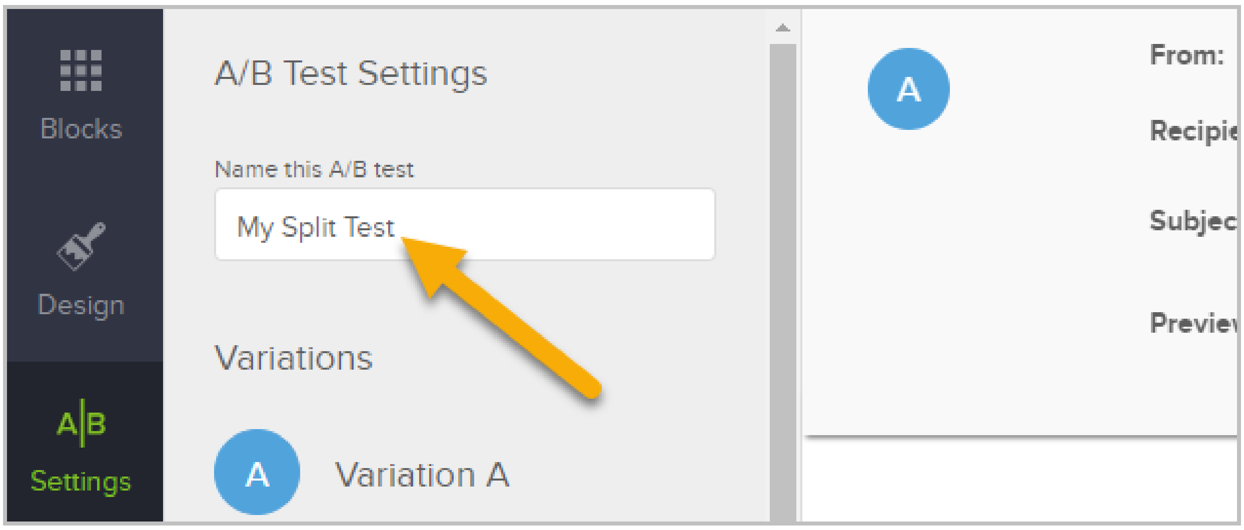
1. Click the **A/B Settings** button when you are designing your broadcast email



2. Click the **Enable A/B Testing** button

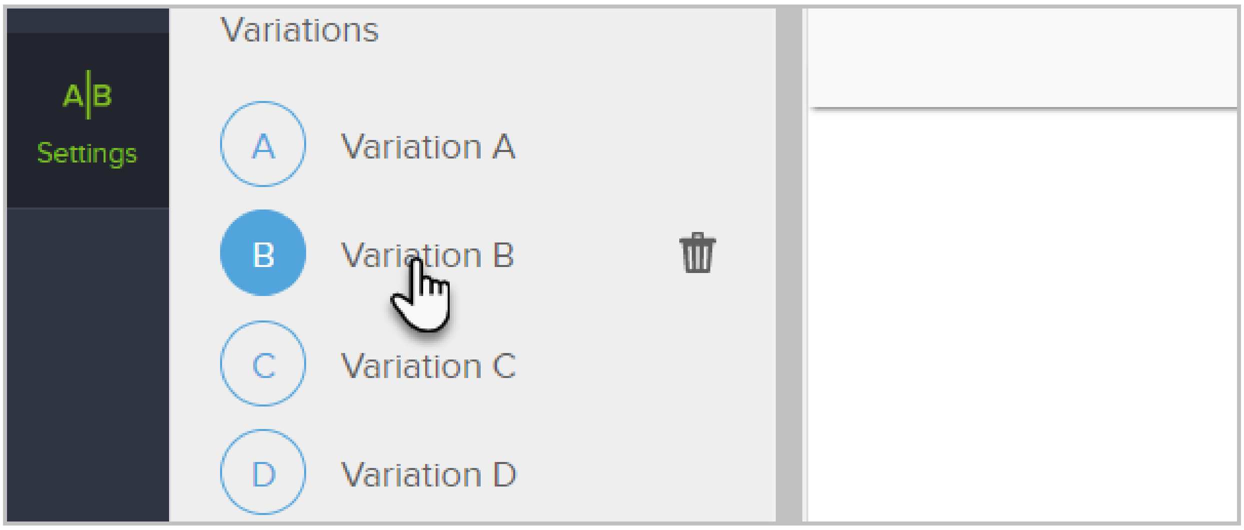


3. Name your split test



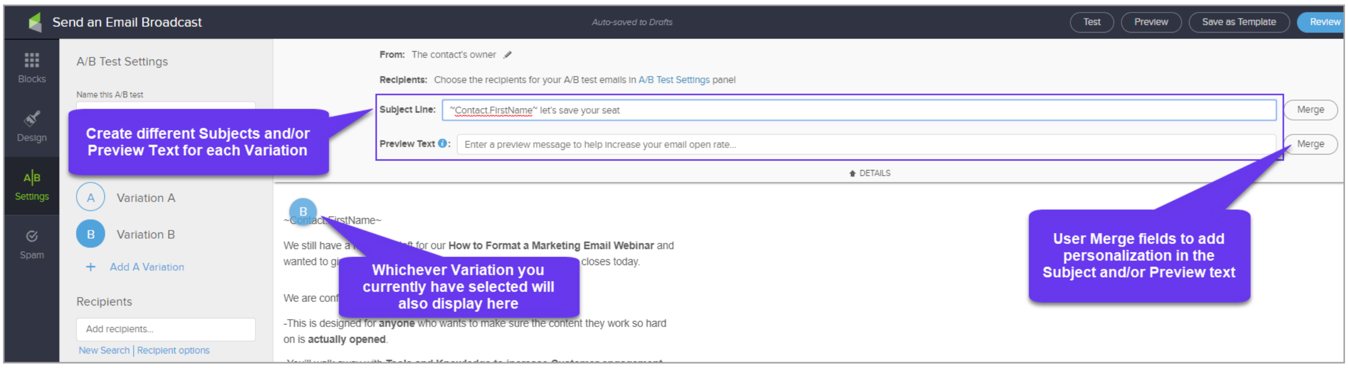
4. Add variants

You can add up to 5 email variants to split-test. Then, you can move between variants by clicking on the variation buttons. When you add additional Variation it copies the previous Variation Subject, preview text, and design.



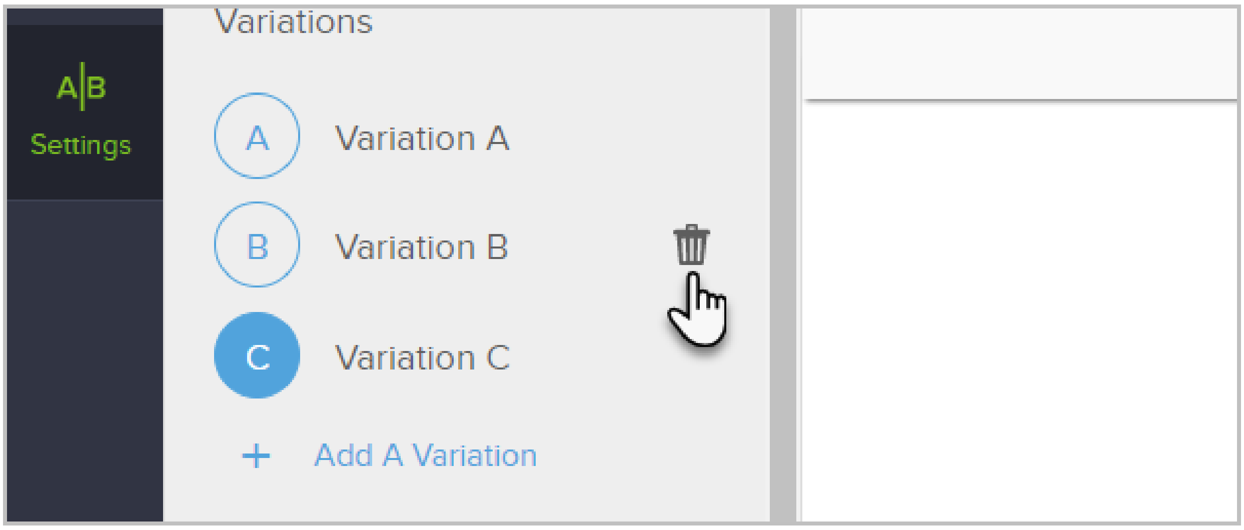
Here are the most common elements that are split-tested:

- Call to action
- Subject line
- Preview text
- Overall design
- The overall message: Headline, Body and Closing text

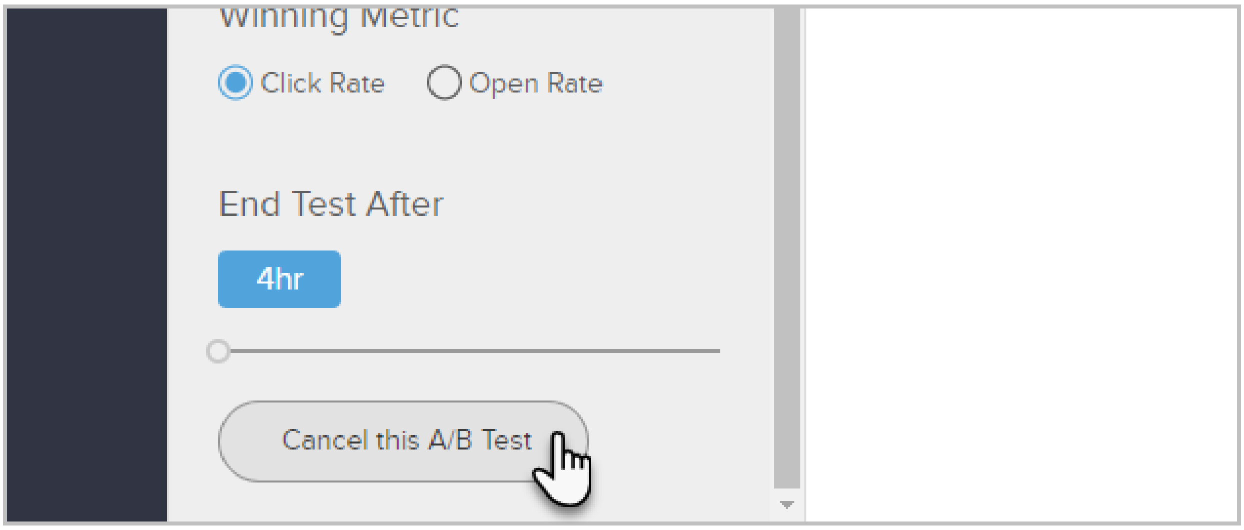


Pro-Tip: Click on above image to view larger

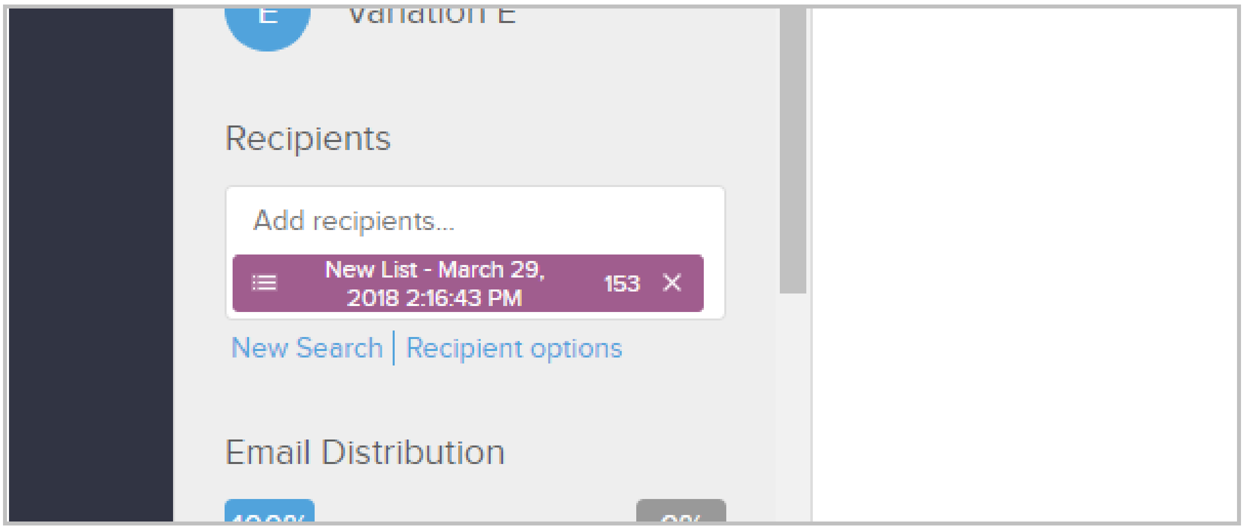
Note that you can quickly delete a variant by clicking the trash can icon.

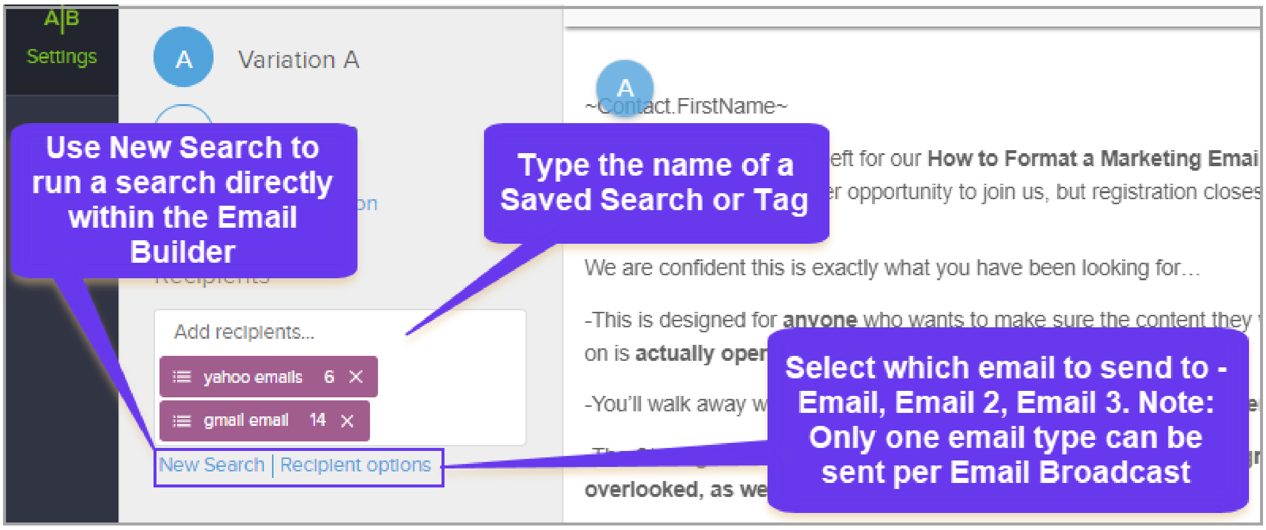


Also, note that you can cancel this split-test altogether by clicking the **Cancel this A/B Test** button at the bottom.



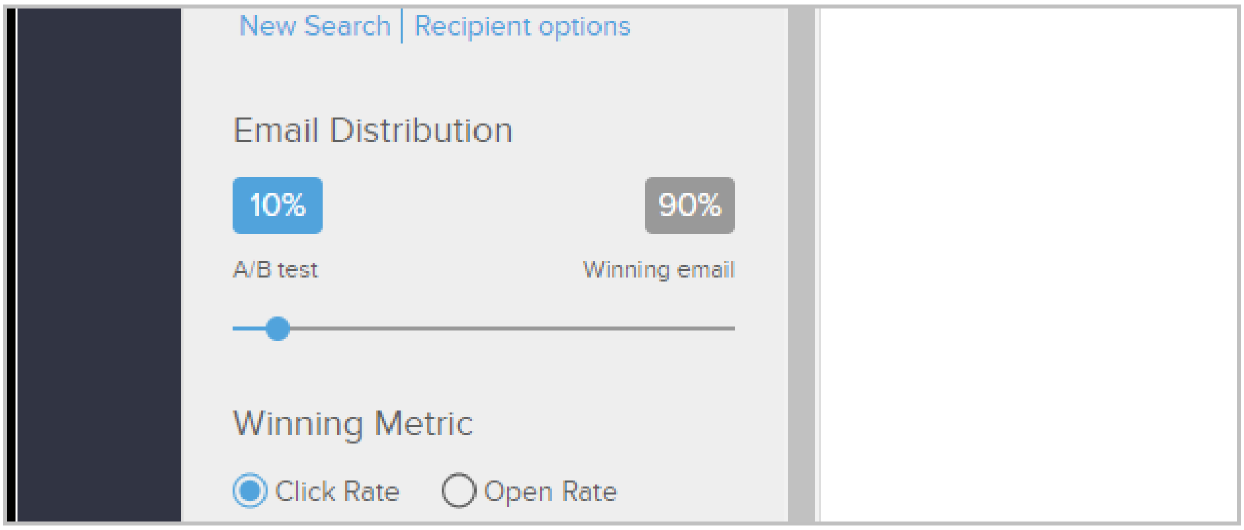
5. Choose the recipients for the email.
    - Use a saved search you've created before (e.g., "Newsletter List")
    - Add recipients based on a tag applied
    - Or click "New Search" to search directly within the Email Builder.



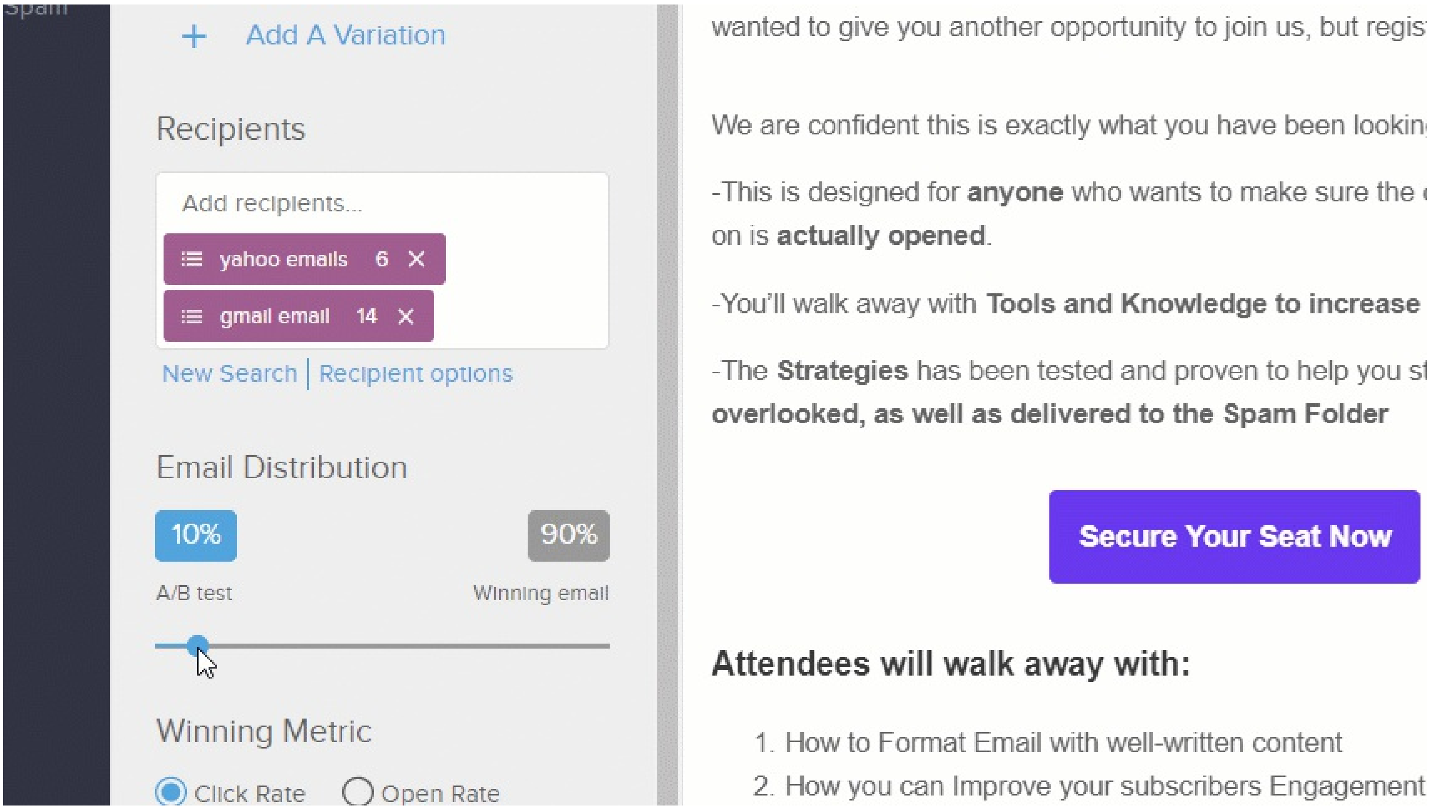


Pro-Tip: Use New Search if you want to send to contacts that contain a tag but also excludes a tag.

6. The slider allows you to control how emails are distributed

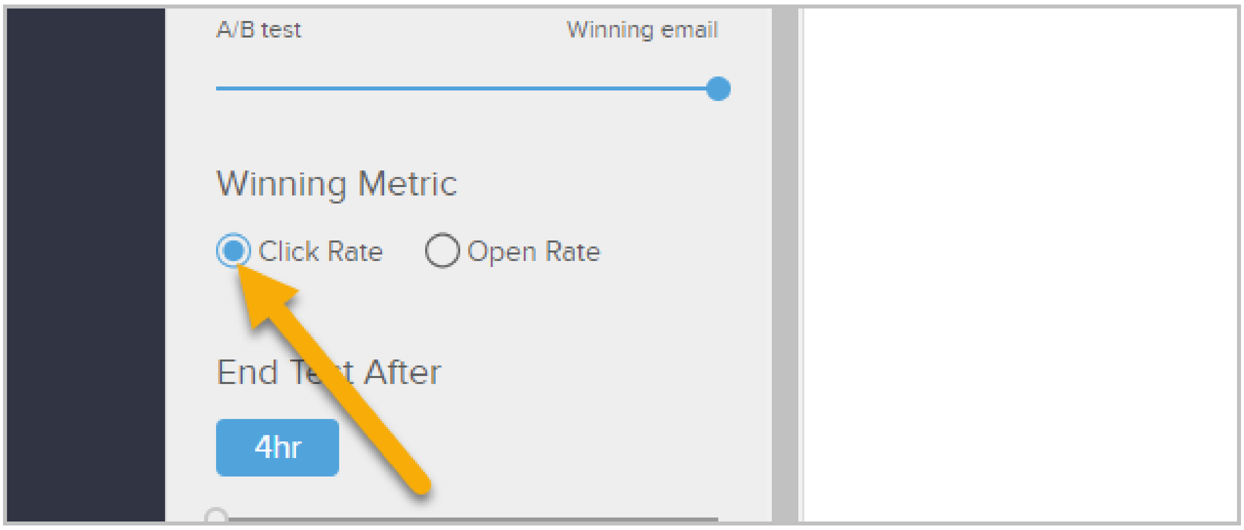


For example, in the image below, 10% percent of the emails will be split evenly between the email variants that you create. Then, based on the winning metric (which is explained in the next step) the system will distribute the rest of emails (90%). If you prefer, you can split test your entire distribution list by moving the slider all the way to the right.



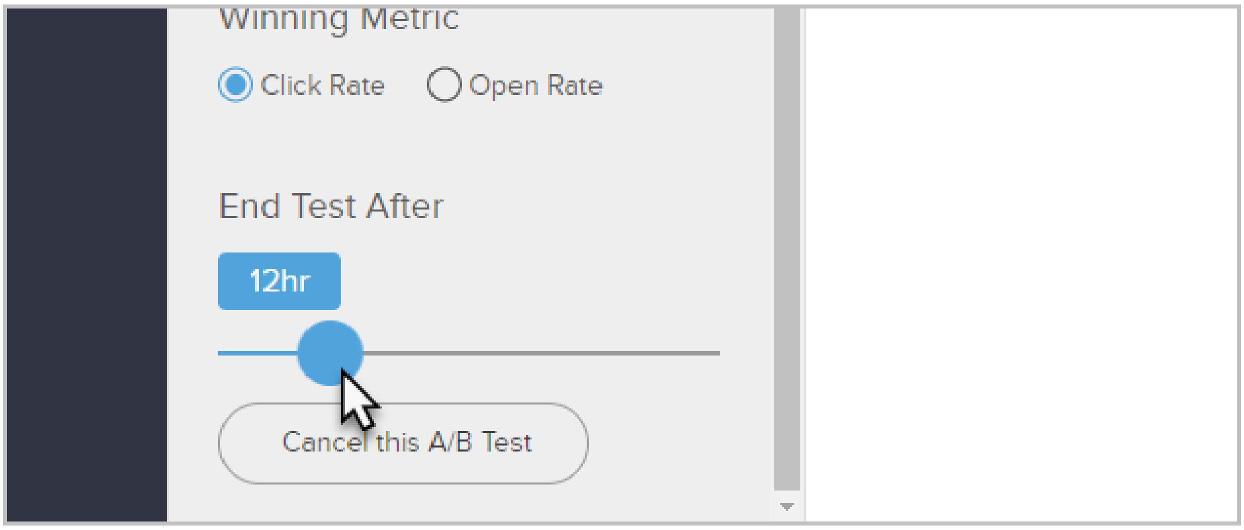
7. Choose the winning metric for this A/B test
    - Click Rate: Also called, "click-through rate" this is the percentage of recipients that clicked a link in your email. This is a very common way to measure the effectiveness of your email's call to action.
    - Open Rate: Another way to measure the success of an email is the percentage of recipients that opened your email. This is also a common metric for measuring email effectiveness, but not as scientific as click rate due to the false positives and

false negatives that is inherent with email clients.



8. Determine the time period that you would like to run the test

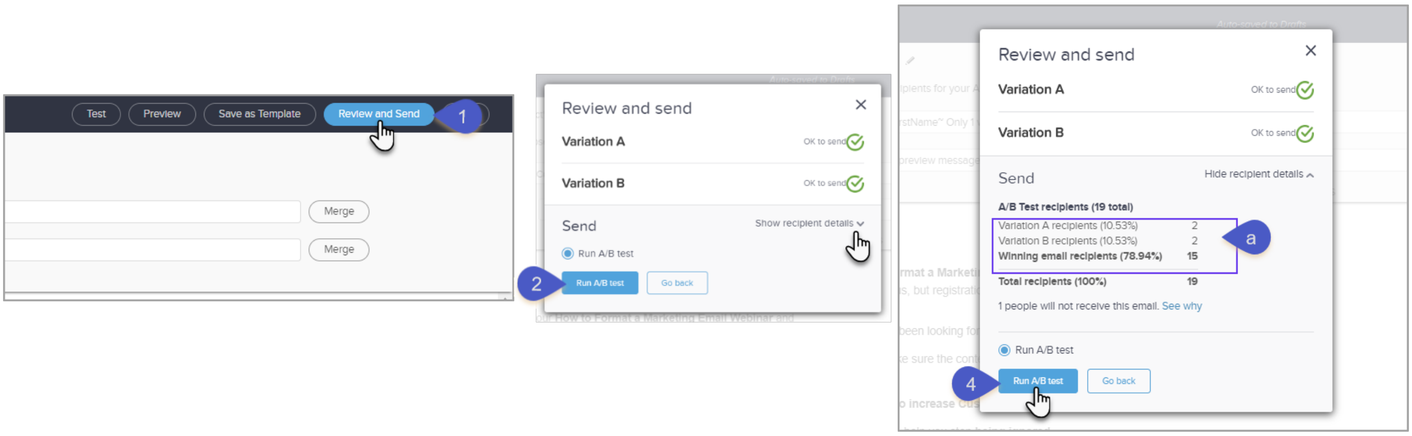
You can choose to run your split-test from 4 hours, all the way up to 7 days. The time period you choose will primarily depend on your list size and how active your list is. A split-test to a large, active list may only take 4-8 hours. A small or less active list may take longer to get an accurate picture of which email variant was the most successful.



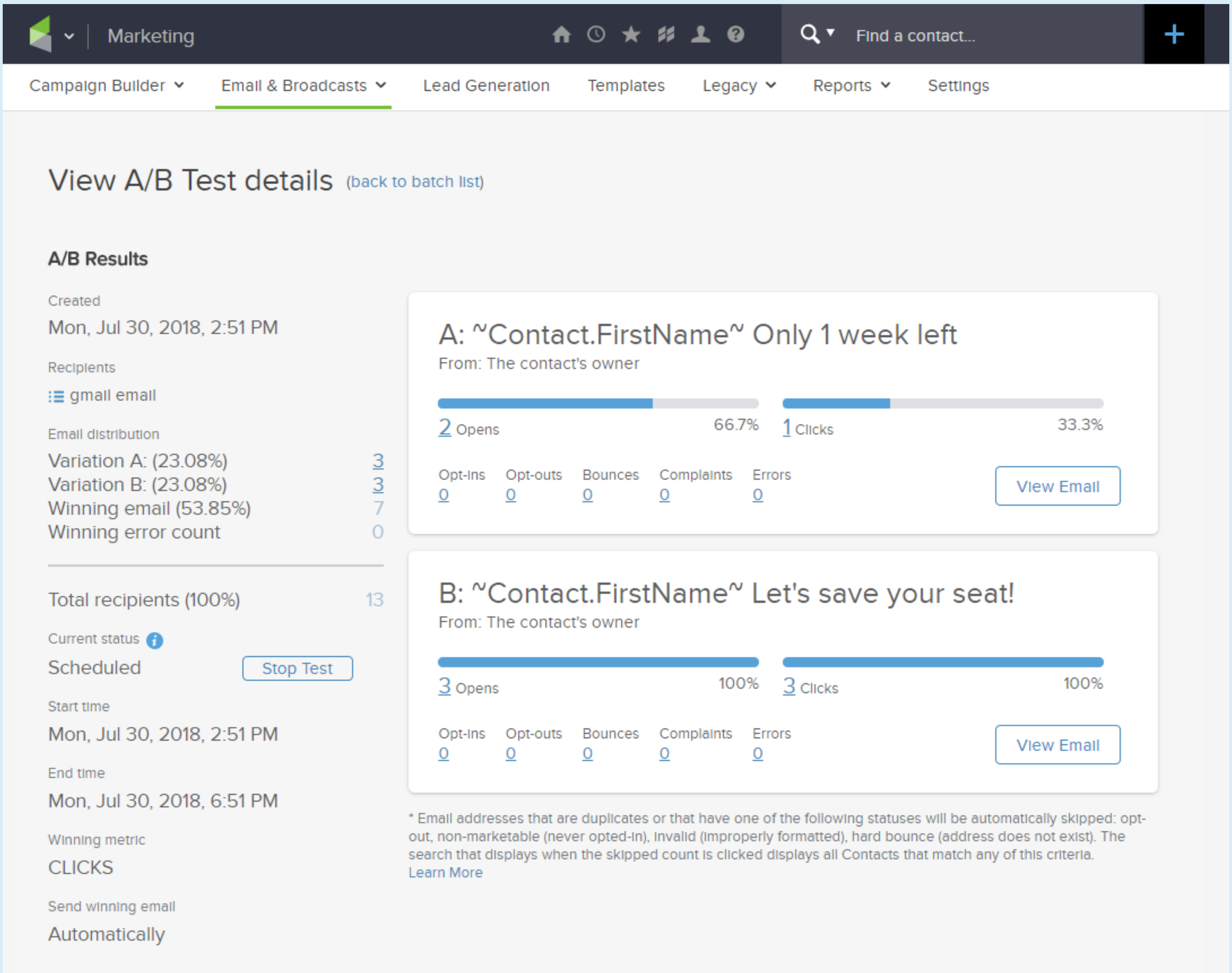
9. When you are ready to run your split test, click the **Review and Send** button at the top right
10.
    a. You will be able to see details on the variant distributions prior to starting the test.

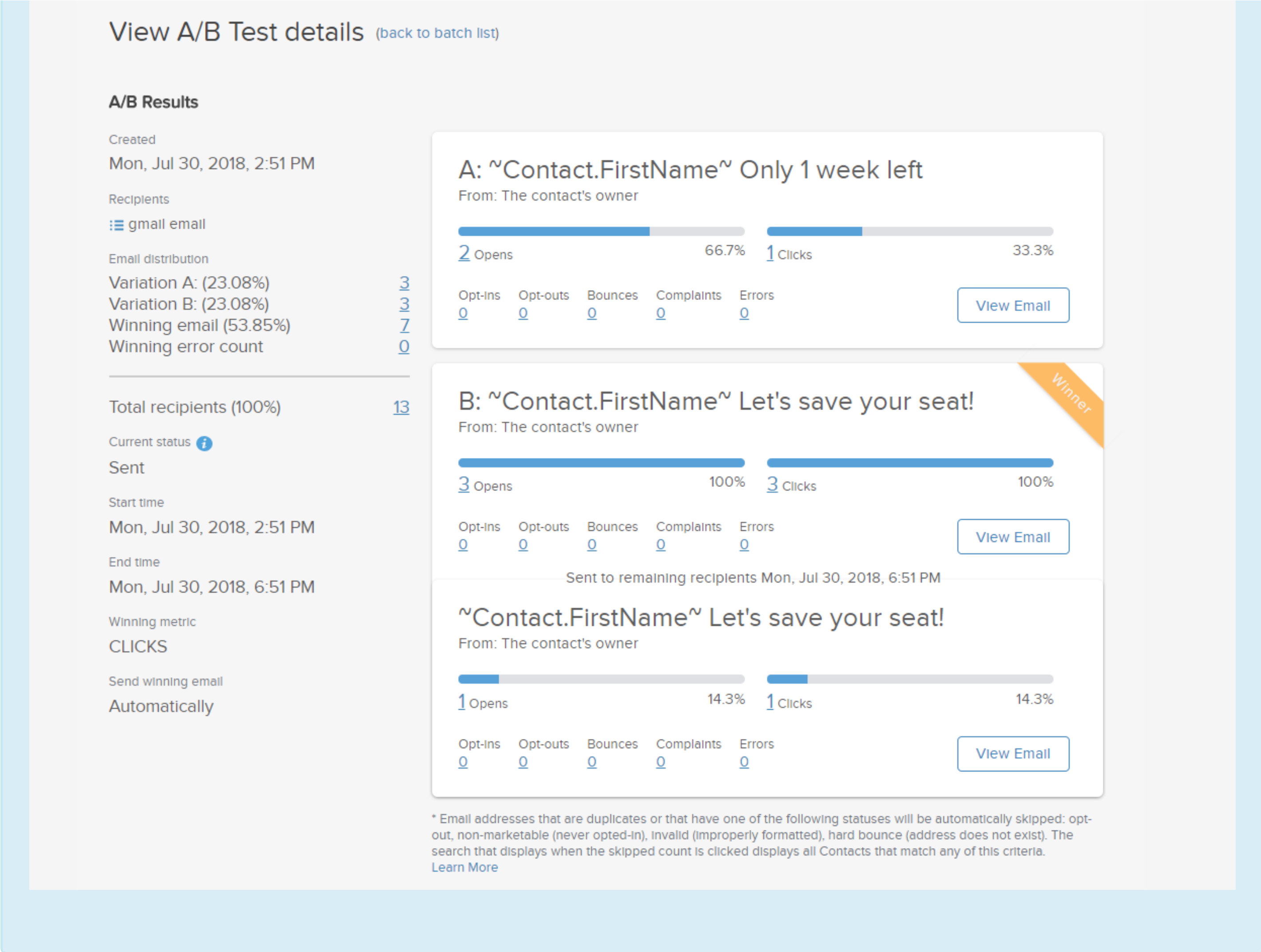
A/B Testing currently doesn't have the ability to schedule to send the email on a specific date/time

10. Click the **Run A/B Test** button to start the test



Pro Tip! The Broadcast Report pages will help you can better understand your results of your A/B Test.




View A/B Test details (back to batch list)
A/B Results
Created
Mon, Jul 30, 2018, 2:51 PM
Recipients
gmail email
Email distribution
Variation A: (23.08%) 3
Variation B: (23.08%) 3
Winning email (53.85%) 7
Winning error count 0
Total recipients (100%) 13
Current status
Sent
Start time
Mon, Jul 30, 2018, 2:51 PM
End time
Mon, Jul 30, 2018, 6:51 PM
Winning metric
CLICKS
Send winning email
Automatically
A: ~Contact.FirstName~ Only 1 week left
From: The contact's owner
2 Opens 66.7%
1 Clicks 33.3%
Opt-ins 0 Opt-outs 0 Bounces 0 Complaints 0 Errors 0
View Email
B: ~Contact.FirstName~ Let's save your seat!
Winner
From: The contact's owner
3 Opens 100%
3 Clicks 100%
Opt-ins 0 Opt-outs 0 Bounces 0 Complaints 0 Errors 0
View Email
Sent to remaining recipients Mon, Jul 30, 2018, 6:51 PM
~Contact.FirstName~ Let's save your seat!
From: The contact's owner
1 Opens 14.3%
1 Clicks 14.3%
Opt-ins 0 Opt-outs 0 Bounces 0 Complaints 0 Errors 0
View Email
* Email addresses that are duplicates or that have one of the following statuses will be automatically skipped: opt-out, non-marketable (never opted-in), invalid (improperly formatted), hard bounce (address does not exist). The search that displays when the skipped count is clicked displays all Contacts that match any of this criteria.
Learn More

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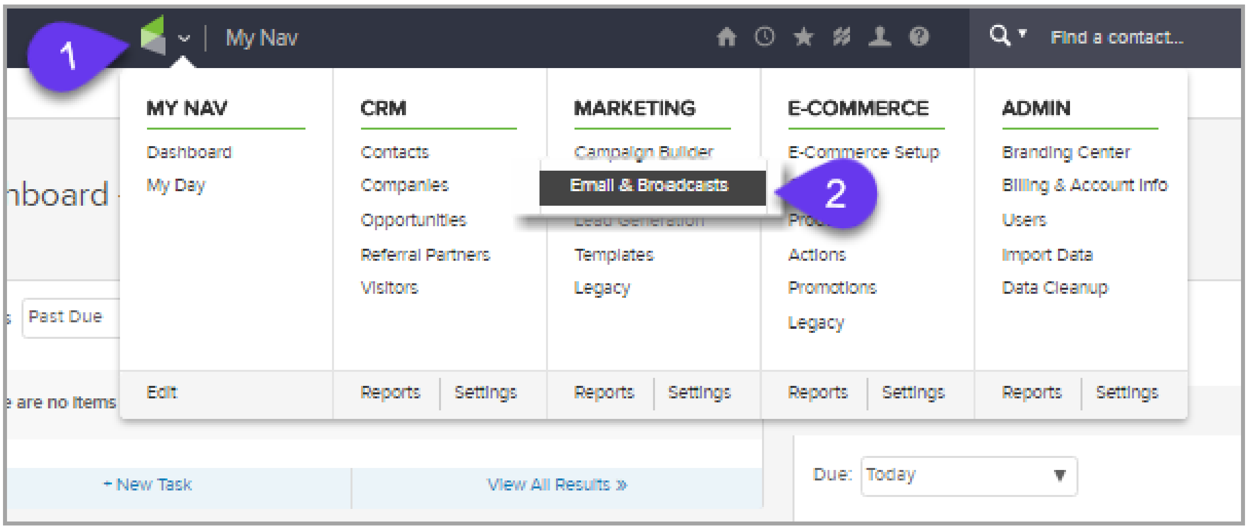
Email Broadcast - Best Send Time

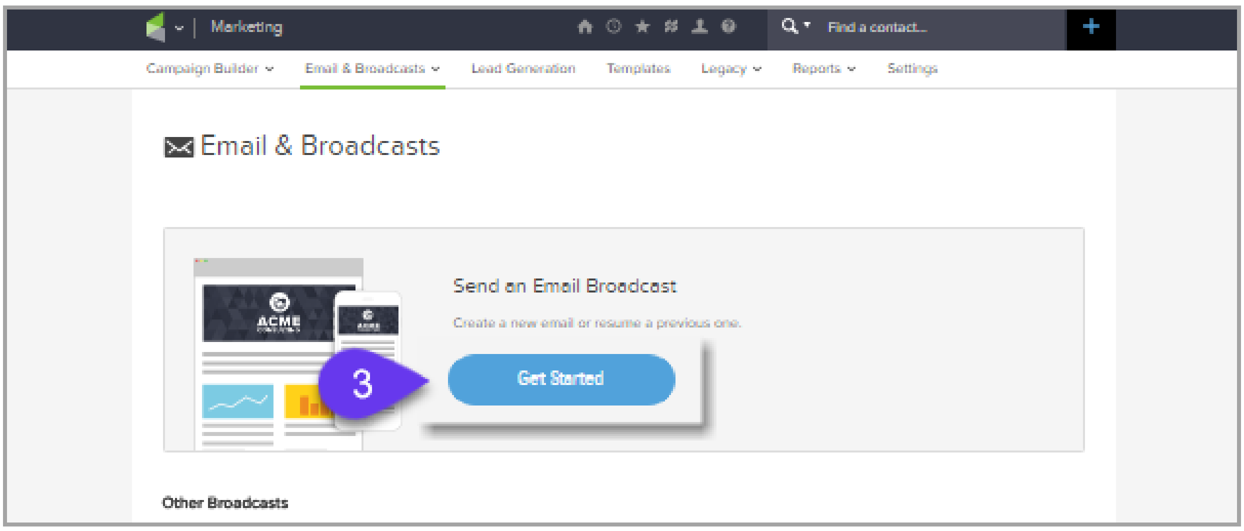
Last Modified on 07/23/2018 2:34 pm MST

Infusionsoft can calculate the Best Time to send an email to a given group of recipients. Infusionsoft will attempt to calculate the ideal send time for your selected audience when a confidence of at least 75% is met. If the confidence level is lower that 75%, we will send the broadcast based on the best send time for the average customer.

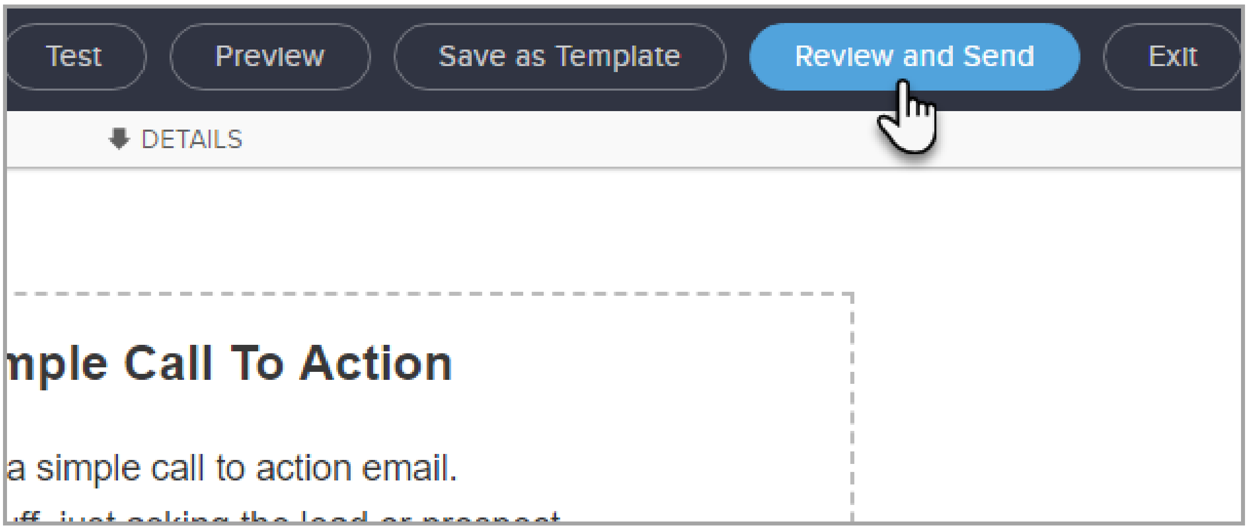
1. Go to **Marketing > Email & Broadcasts**



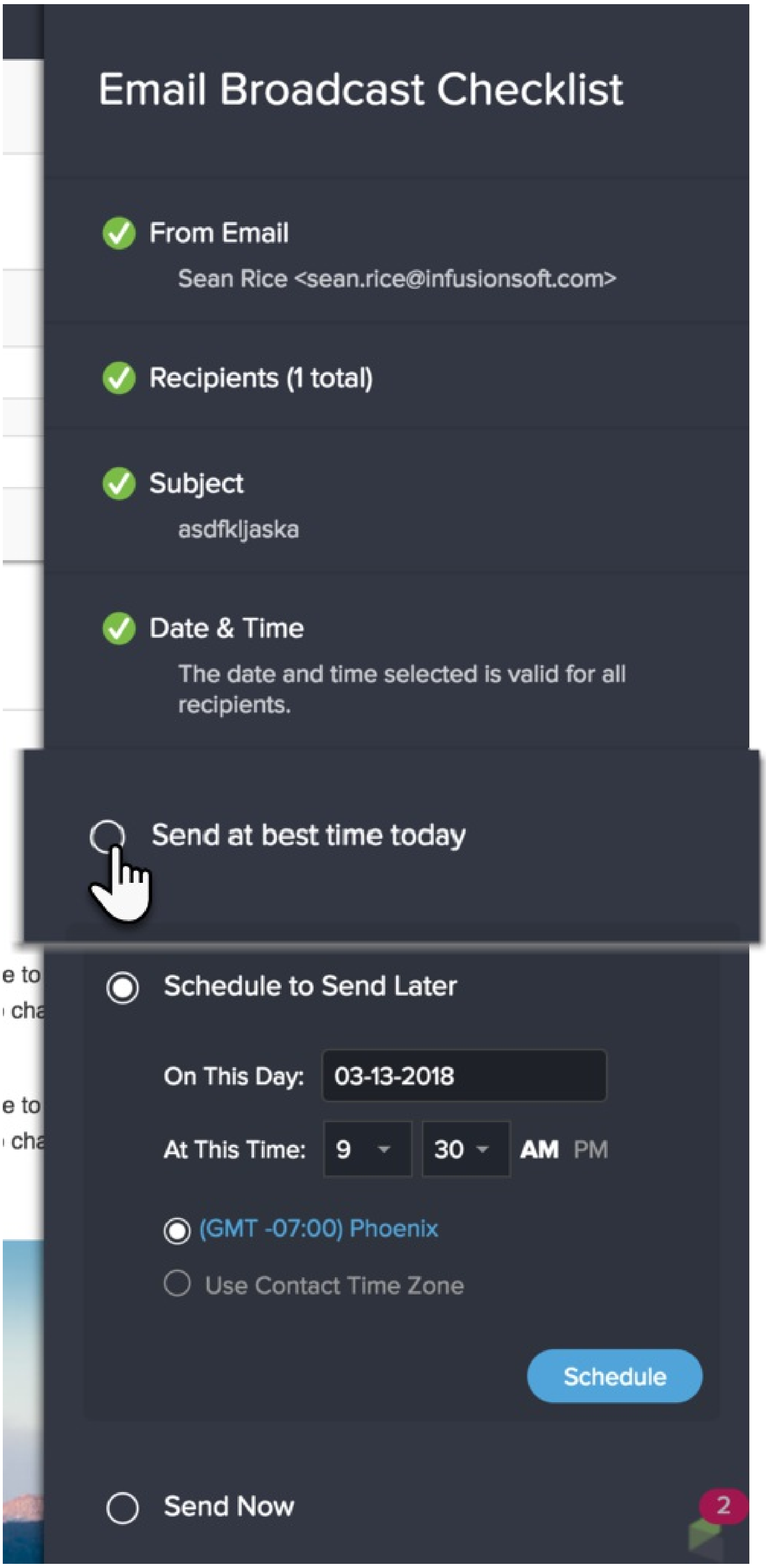
2. Click **Get Started**



3. When you are ready to send click **Review and Send**



4. Click the radio button called **Send at the best time today**


Email Broadcast Checklist
From Email
Sean Rice <sean.rice@infusionsoft.com>
Recipients (1 total)
Subject
asdfkljaska
Date & Time
The date and time selected is valid for all recipients.
Send at best time today
Schedule to Send Later
On This Day:
03-13-2018
At This Time:
9
30
AM
PM
(GMT -07:00) Phoenix
Use Contact Time Zone
Schedule
Send Now
2

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Content Checking Tool

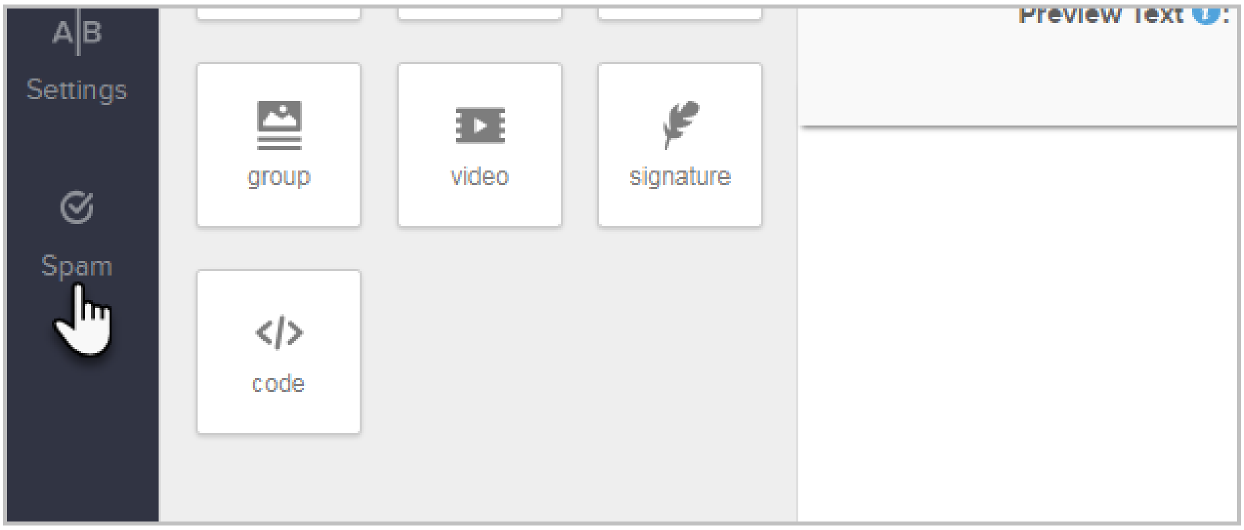
Last Modified on 09/07/2018 5:12 pm MST

The email builder has built-in functionality to help you avoid triggering spam filters. Certain keywords can trigger these filters, which send your email straight to your contact's junk folder, where it sits unread. You can check your emails for these keywords by clicking the "Spam" icon in the email builder. These keywords will also be flagged when you click "Review and send" before sending your email.

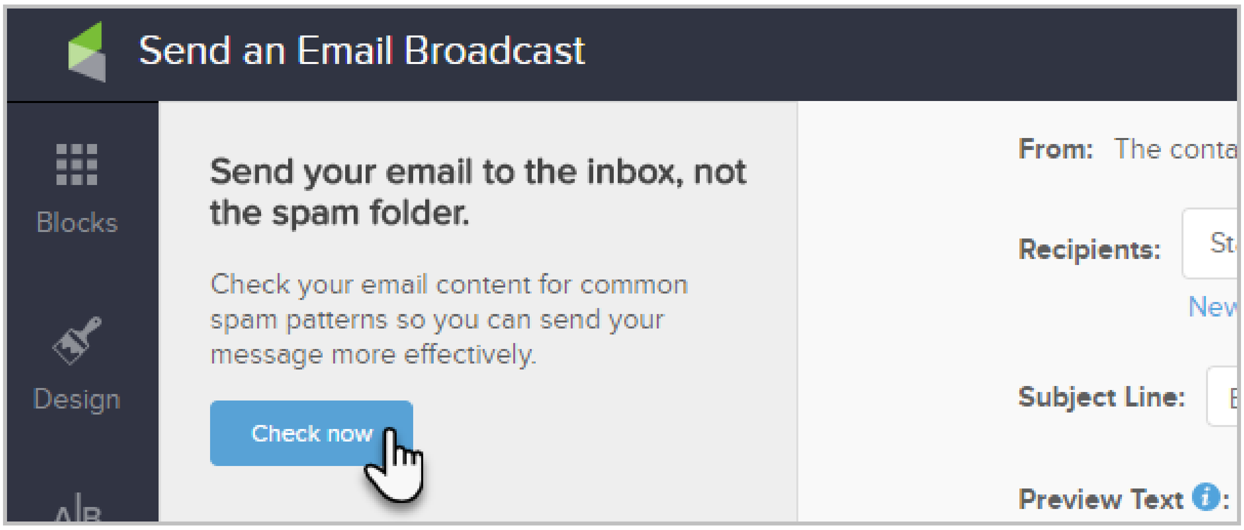
Please Note: This is currently only available when sending an email broadcast

How use Content Checking

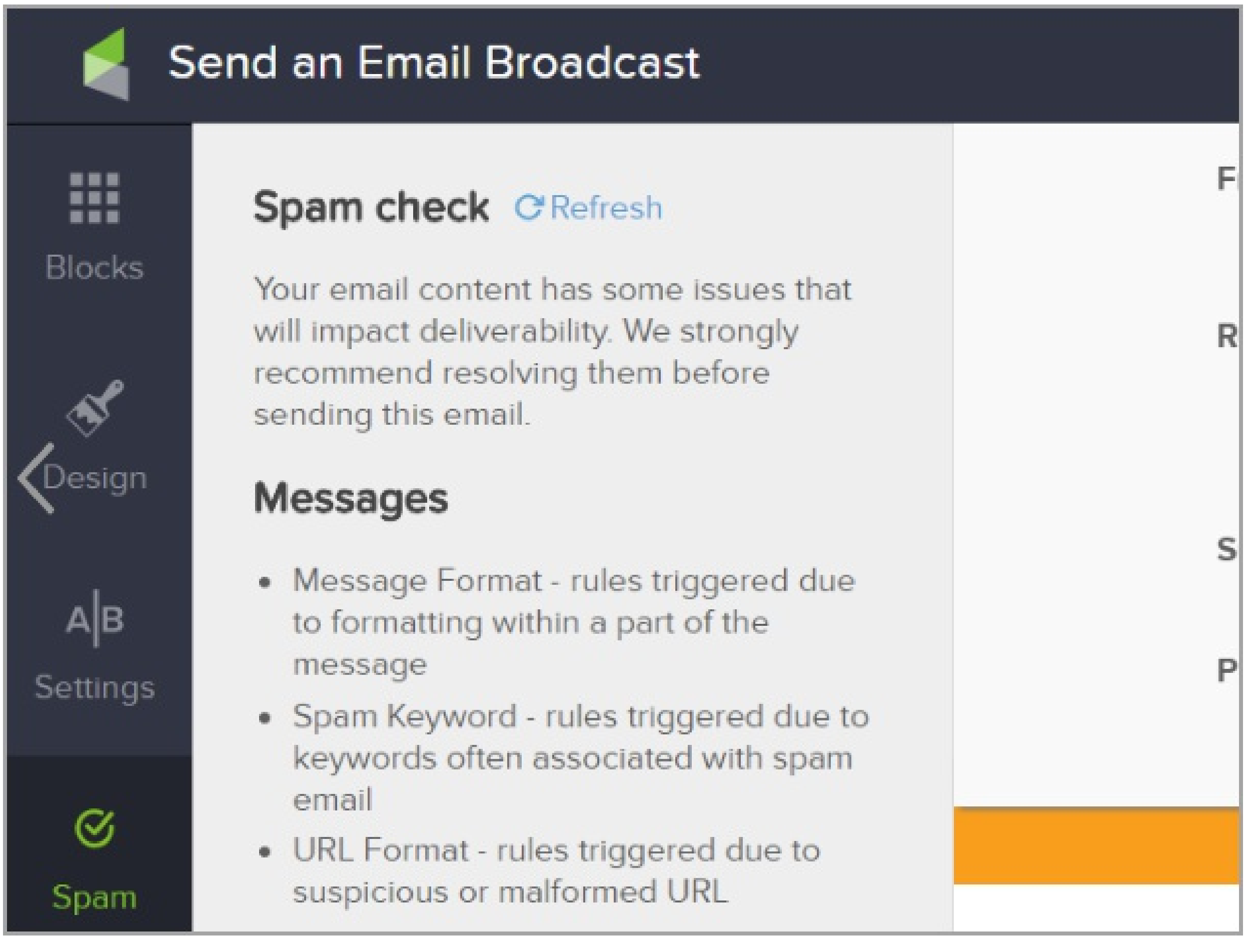
1. You can manually check the contents of an email you are composing by first clicking the **Spam** button.



2. Click **Check now**

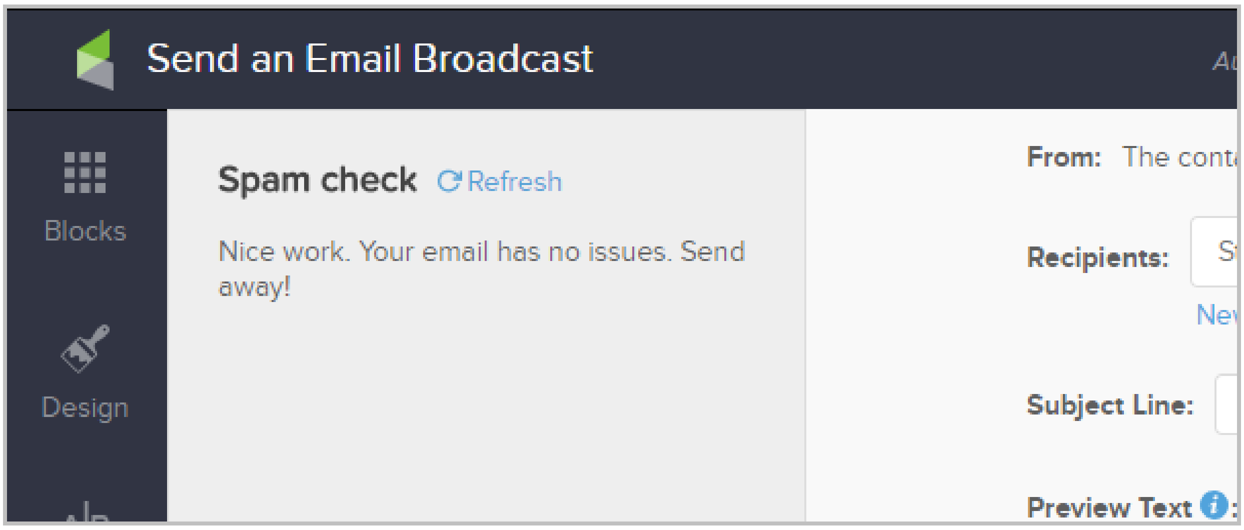


3. You will then be presented with an alert message detailing the errors that need to be resolved prior to sending the email



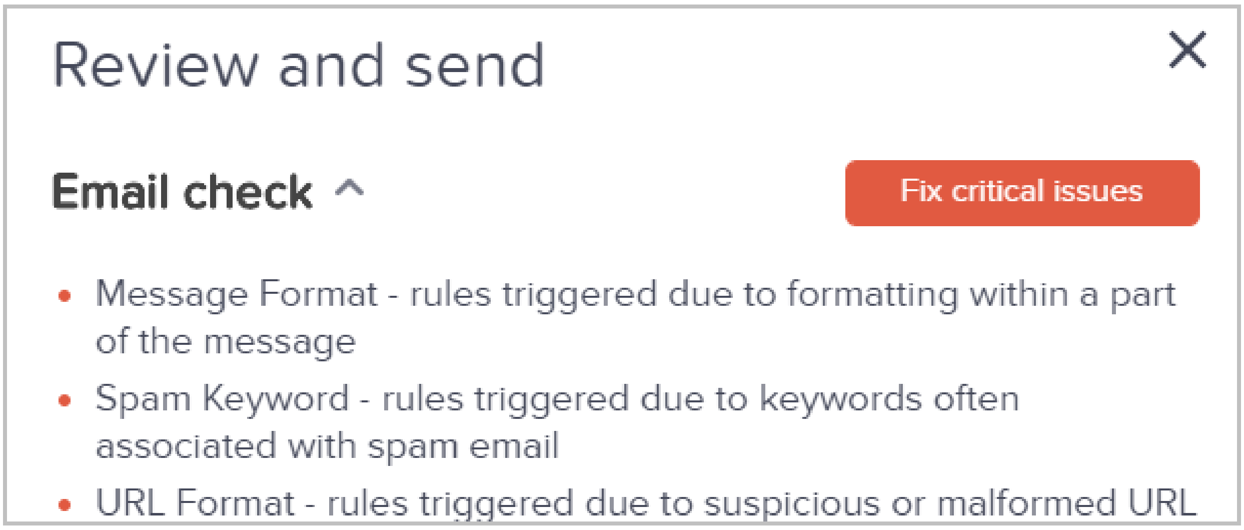
See #4 for examples of possible error messages

You will also be notified if there are no issues found



4. Also, when you click Review and Send, you will be presented with a new modal that will give your email a final check so you can fix any issues prior to sending.

   The following are possible errors you might see:



Private Domains

Infusionsoft recommends using a private business domain to avoid email deliverability issues_In an effort to reduce spam and spoofing, email providers are moving to a policy that will reject mail sent from outside of their respective servers. This means that if you use a 'from' email address from a free provider (Yahoo, AOL, etc.), your email will be rejected because it is sent from Infusionsoft and not that actual provider. Click here for more information on DMARC.

Message Format

Image-to-text ratio: Keep your email to 20% or less images, and at least 80% text to prevent your email from triggering spam filters. Providers look out for this because typically, spammers try to mask their links by including too many images and/ or large images.

Spam Keywords

Certain words and phrases in the subject line or in the body of the email can trigger spam filters and cause them to go to junk folder. Our built in content checker will help you identify if your email contains possible ‘spammy’ words, but it’s best to also A|B test your content to see what yields better results.

The following are examples of phrases that will likely trigger spam filters:

- Meet singles
- Work from home
- Free; F R E E
- $$$
- Stock picks
- Get out of debt
- This isn’t spam
- 100% FREE
- You’re a winner!
- Act now!
- Get paid
- Save $

URL Format

Inbox providers are also looking at the links you’ve included in your email.

- Link shorteners (e.g. Bitly, TinyURL, etc.) are typically flagged as spam. Try A|B testing links to see if it’s the cause of an email landing in the junk folder.

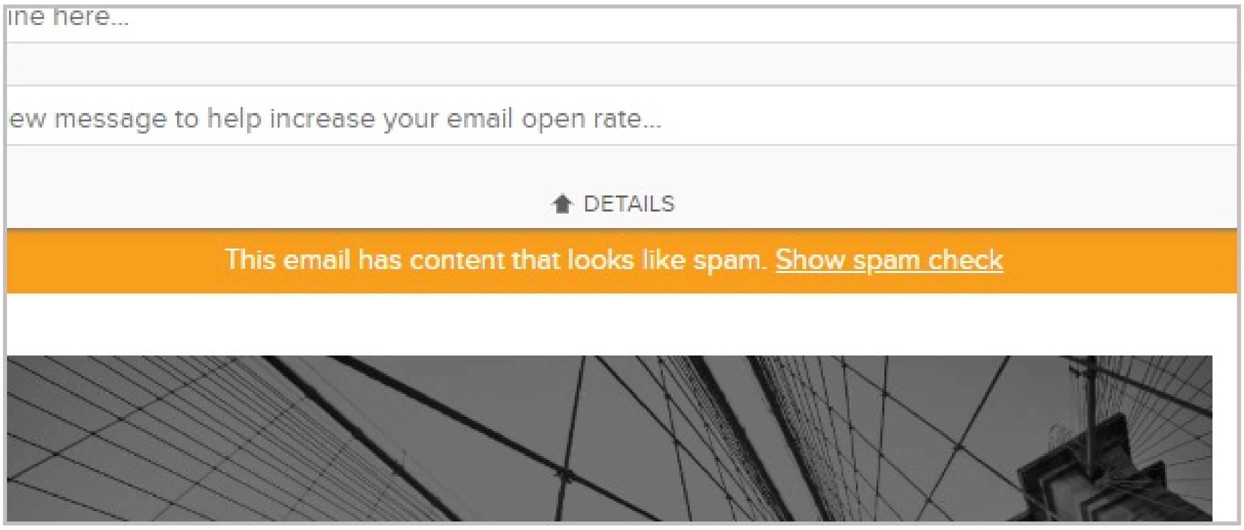
- Unreputable sites or blacklistings can also trigger a spam filter. MXToolbox is a free tool you can use to quickly check if your domain is currently on a blacklist. Navigate to ‘Blacklist check’ on the homepage and enter the domain.

- Malformed links, or links with uncommon characters can be triggered for spam. A couple examples:

    - .com, .net, etc. in the middle rather than the end

    - Uncommon characters (*, &, etc.)

5. If you are working in an email that has been flagged for Spam content, you will see an orange banner at the top of the email.



Clicking the **Show spam check** link simply brings you back to the **Spam** check section of the Email Builder

Using a different version of Infusionsoft? Click Here to learn more

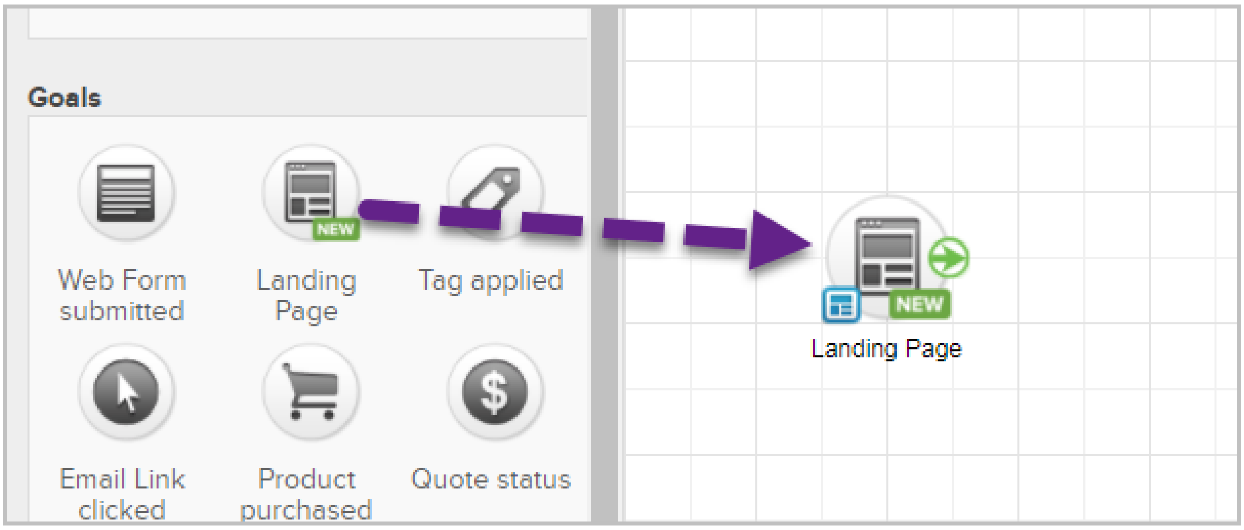
Landing Pages - Choosing a Template

Last Modified on 07/23/2018 2:42 pm MST

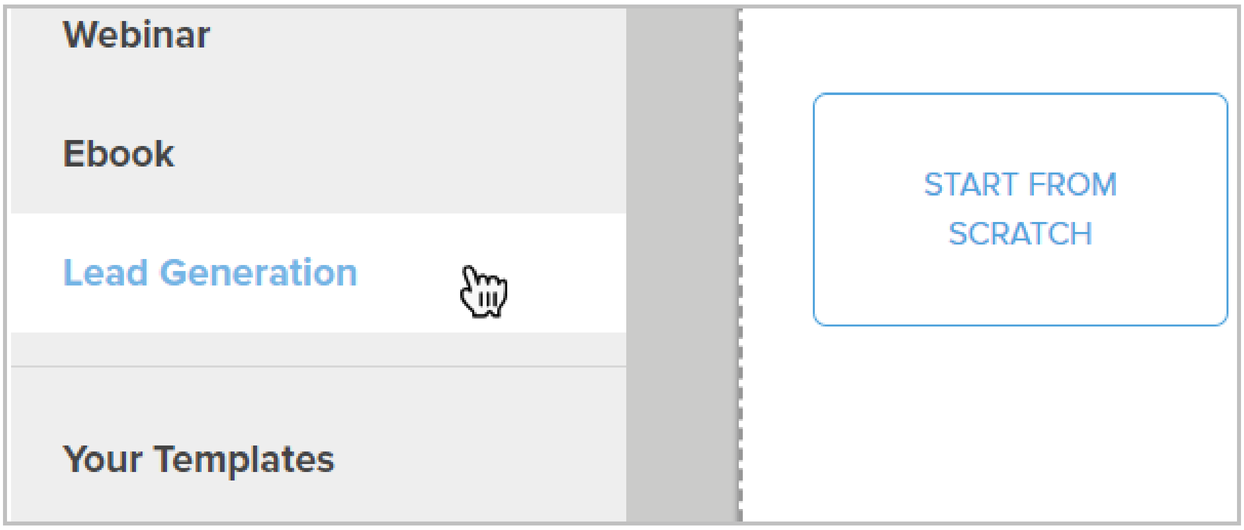
Infusionsoft allows you to create beautiful, stunning, mobile responsive landing pages. Below is how to get started by choosing a template.

1. Navigate to **Marketing** > **Campaign Builder** and click **Create a Campaign** (Or open an existing campaign)

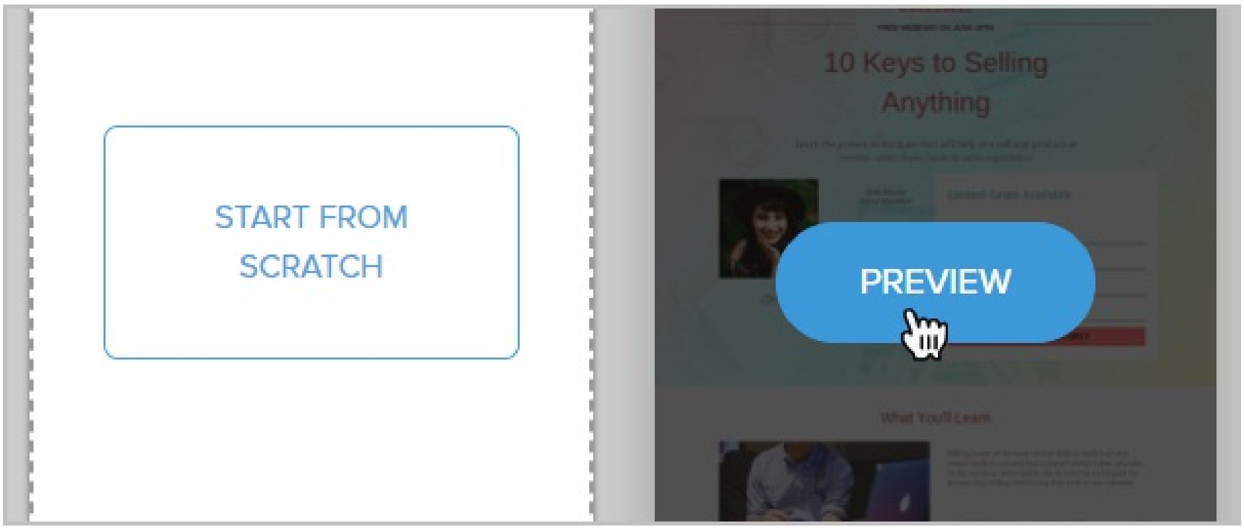
2. In the toolbar, under Goals, drag the New Landing Page goal onto the canvas



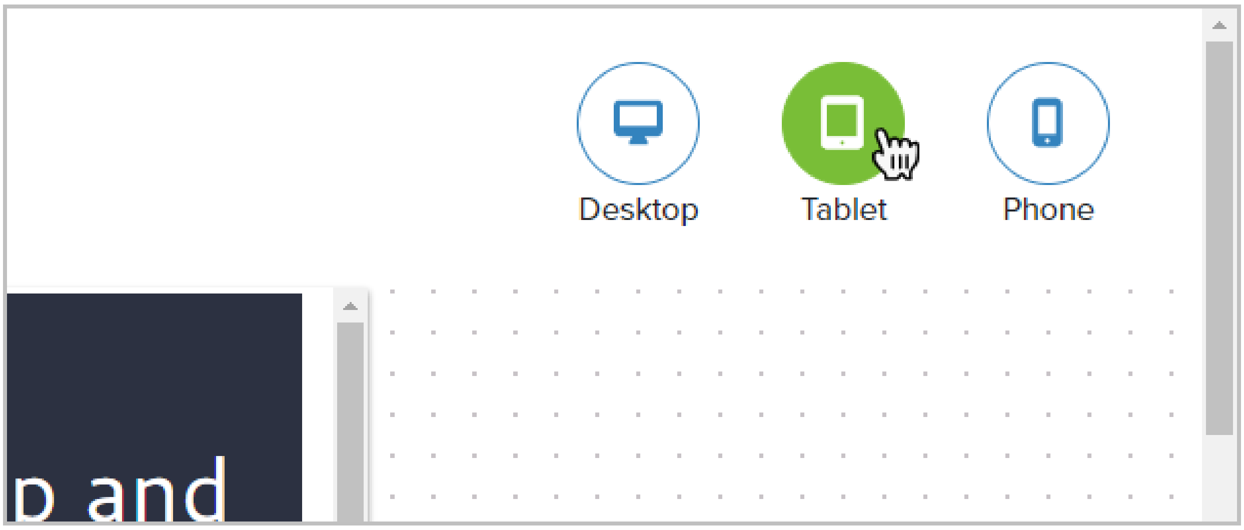
3. Double-click on the center of the landing page goal to open the template gallery. You can filter templates by type (webinar, ebook or lead generation) or choose a tempate you've saved previously. Note that if the Your Templates area becomes to messy, you can archive old templates that you don't use anymore.



4. Hover your curser over a landing page template and click the **Preview** button or you can just start from scratch with a blank template.



5. When previwing a template, note the option to preview Desktop, Tablet, and Phone versions.



6. Once you are ready to edit the template you can click on Use This Template.

7. In the next article, you'll learn how to use the landing page editor to design your landing page.

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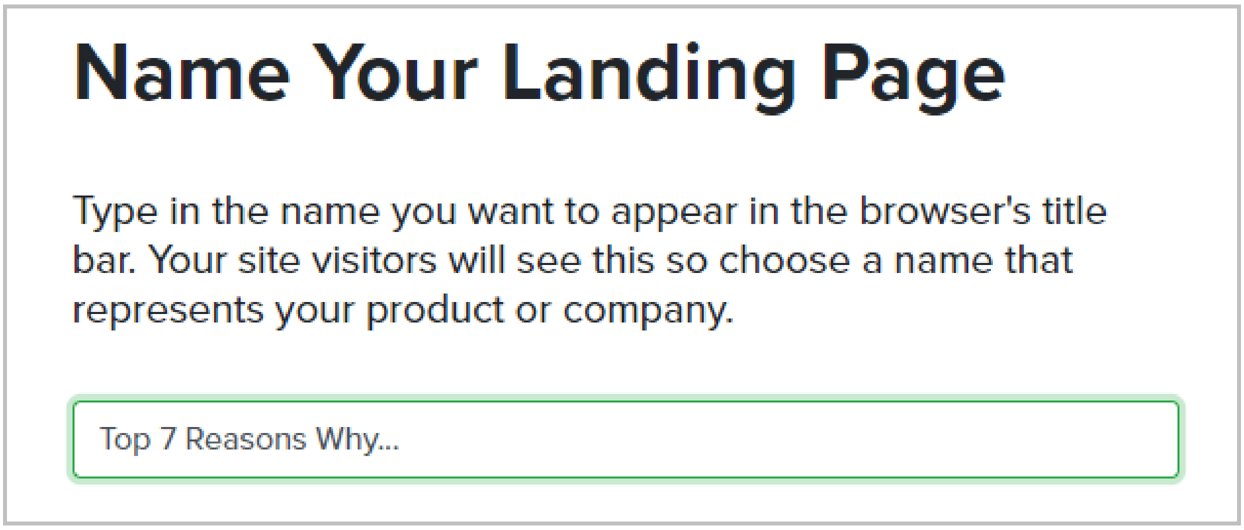
New Landing Pages Design And Configure

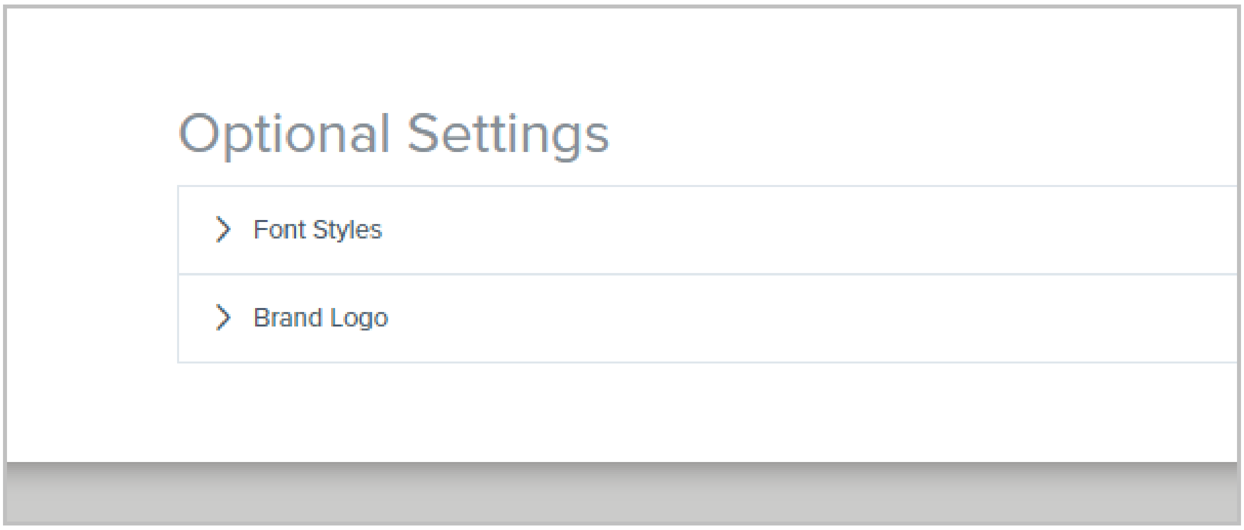
Last Modified on 07/23/2018 2:43 pm MST

After choosing your template, follow the instruction below to learn how to set up and design your New Landing Page template.

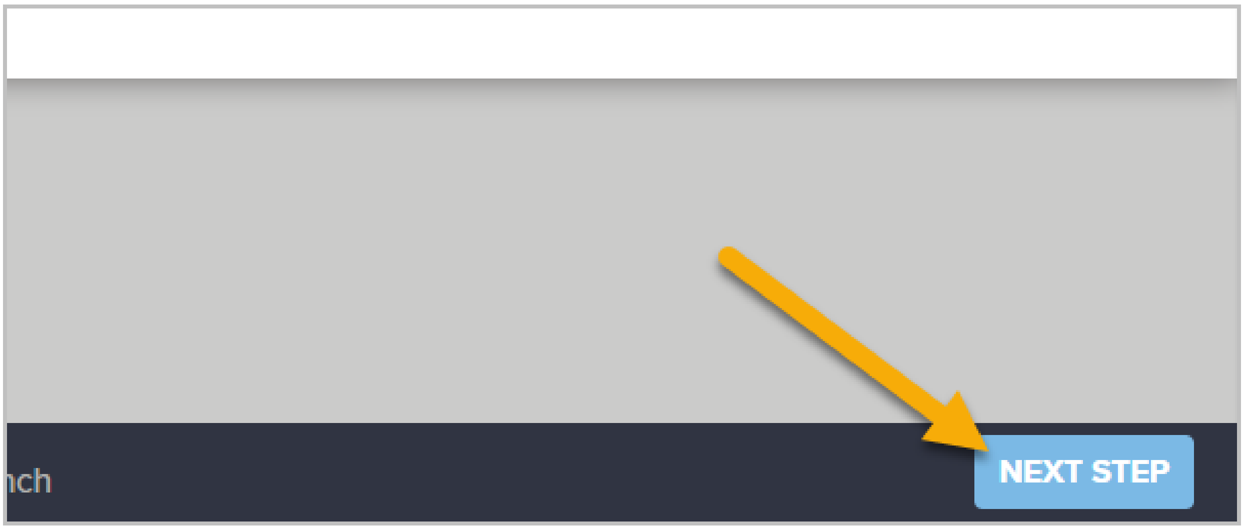
1. The name you type here will be shown in the browser's title bar. Your website visitors will see this, so make sure to choose a name wisely.



2. (Optional) Choose the font set you would like to use and add a logo

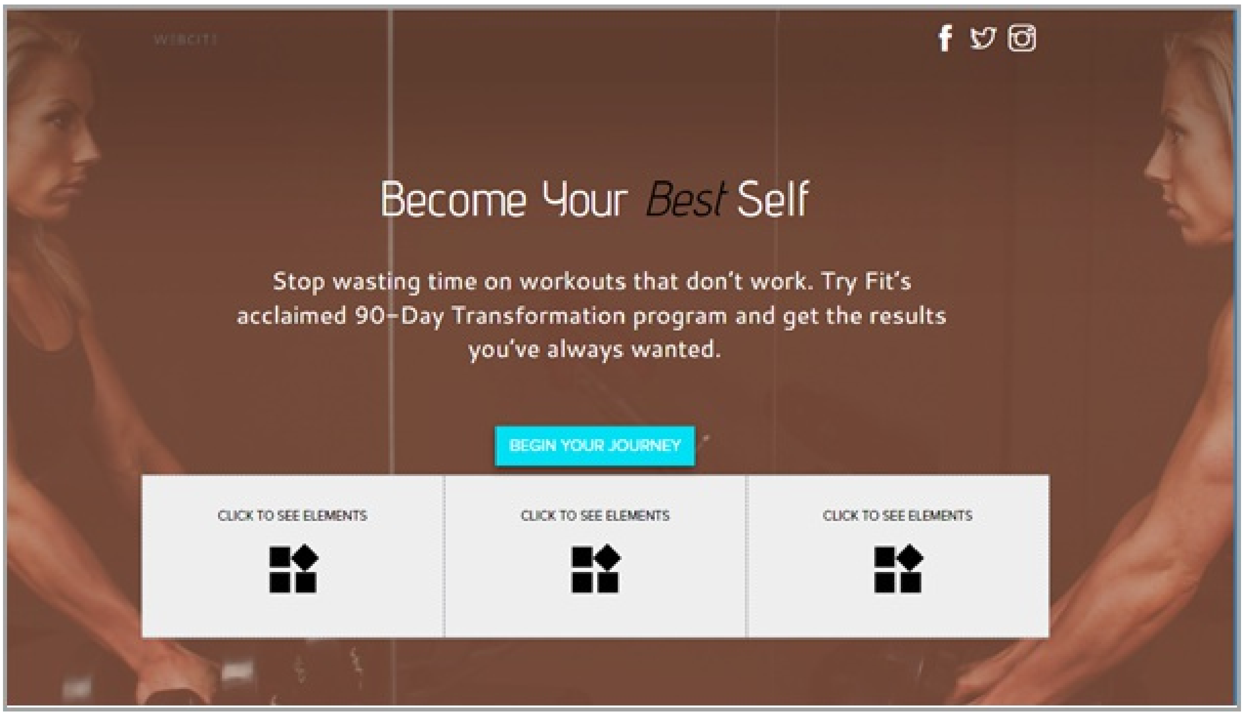


3. Click **Next** to start building your landing page template

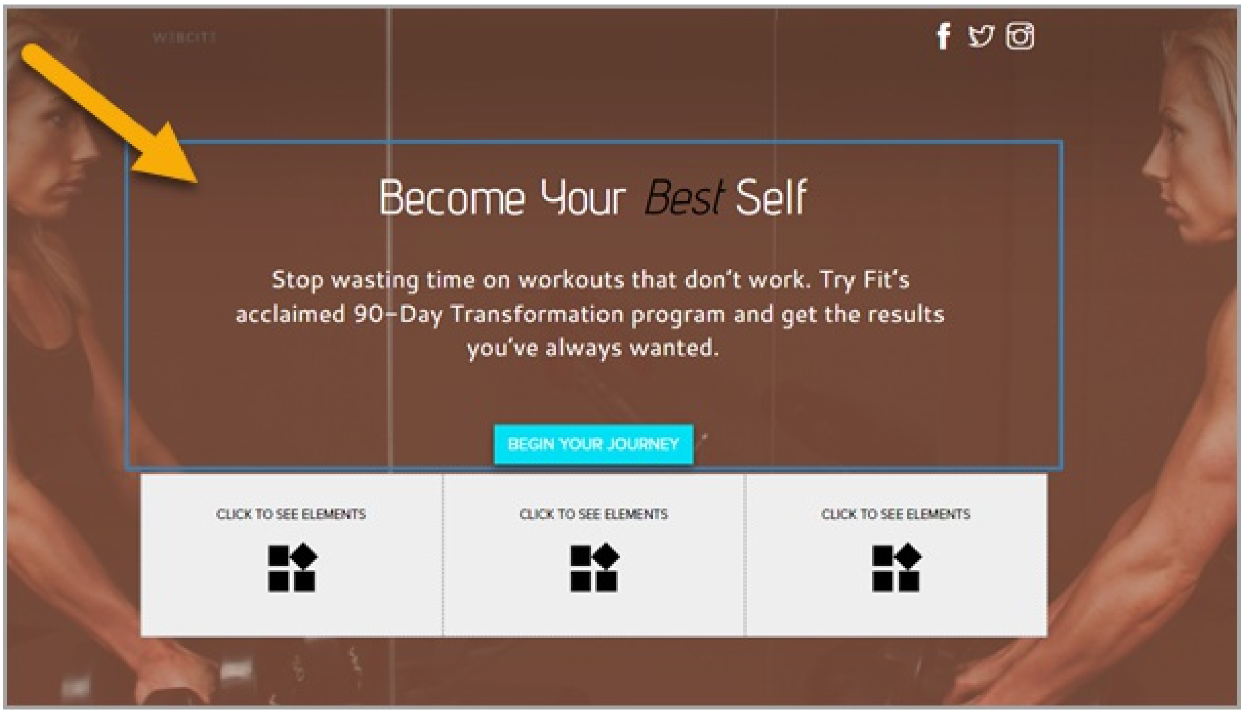


4. We utilize a layout system that is built upon layers. These layers are:

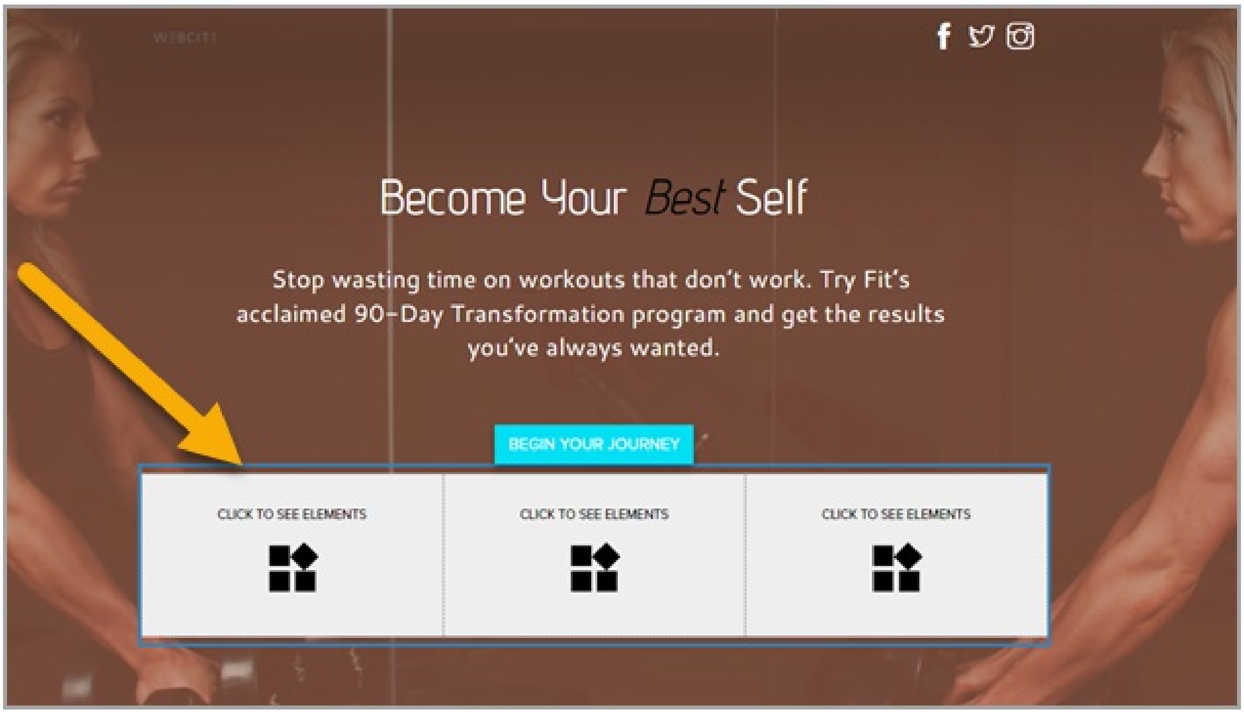
   Section - The foundational layer to your content. Every other layout element sits on top of a **section**. The image below is an example of a Hero Section .



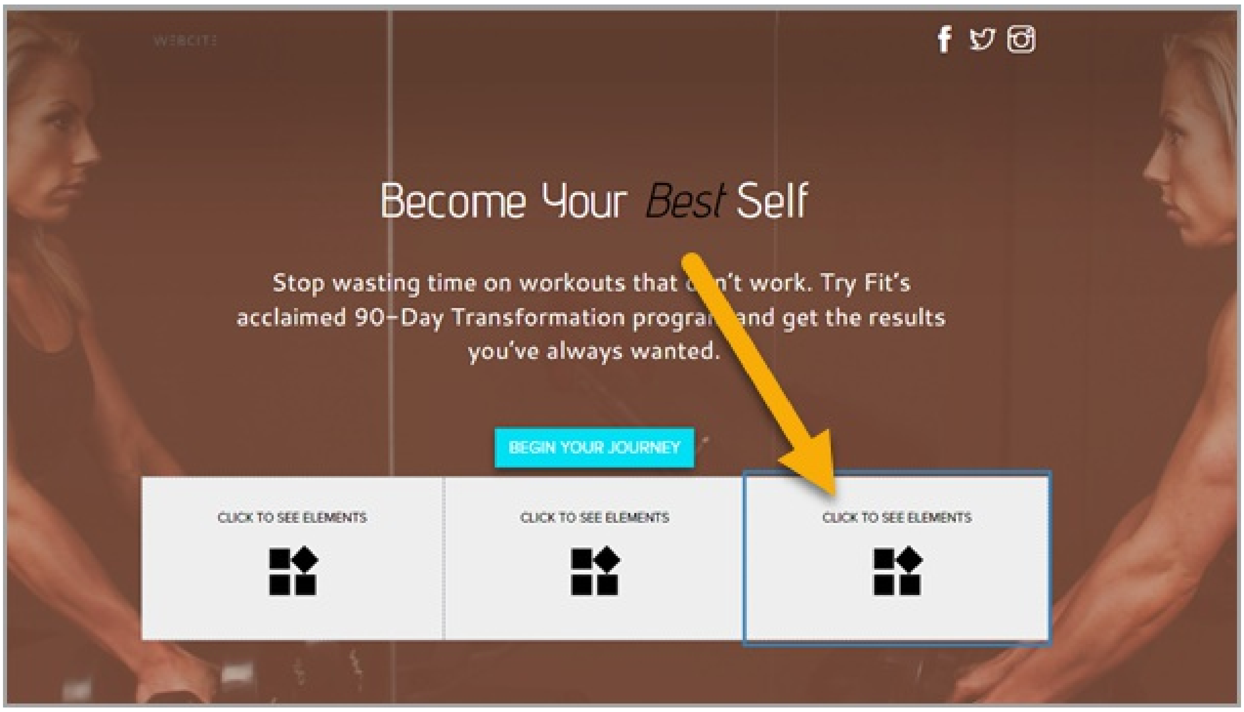
   Row - A horizontal layout element. You can add multiple **rows** in a **section**. The hero section below contains 3 rows: The top row shows the social media icons (in the top right), the Hero text is currently highlighted in the middle, and there is a new row at the bottom that hasn't been configured yet.



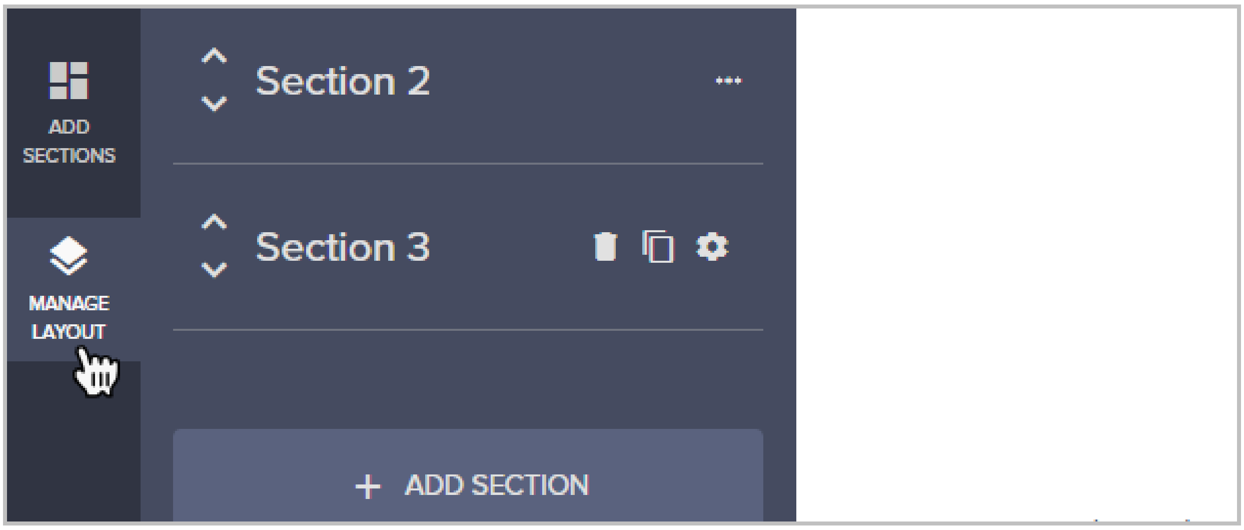
Column - A vertical layout element that sits inside a **row** and contains an element within it. You can add multiple **columns** in a **row**. Note the new row that I added has 3 columns



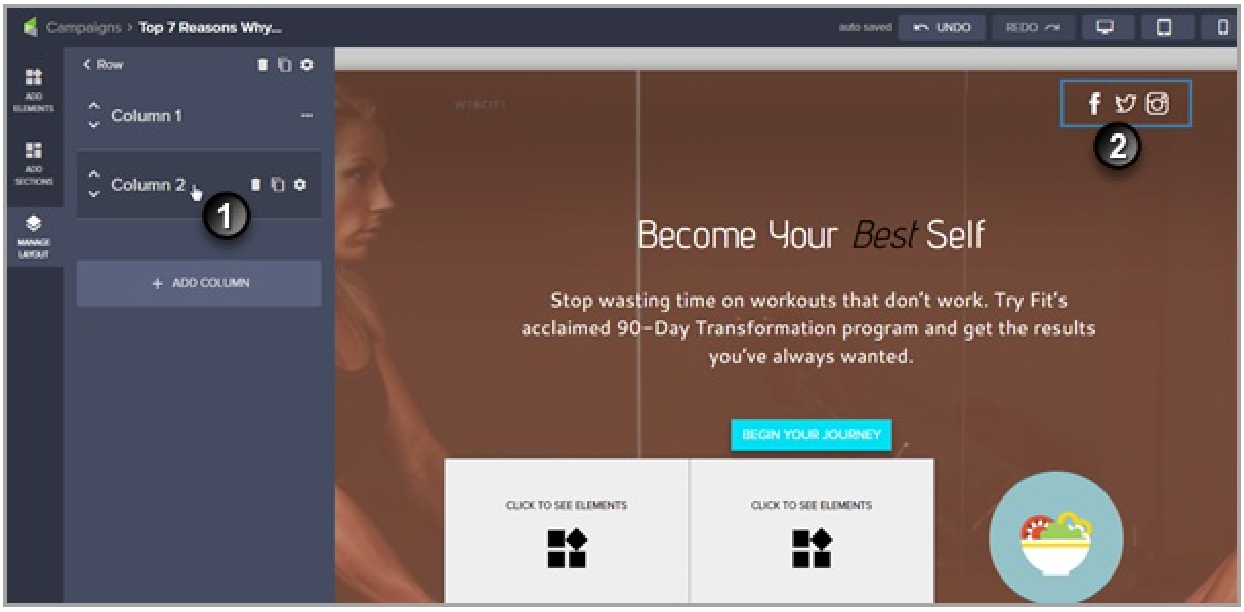
Element - Sits inside a **column**. You can only add one **element** in a **column**. Elements include Text, Image, Buttons, etc...



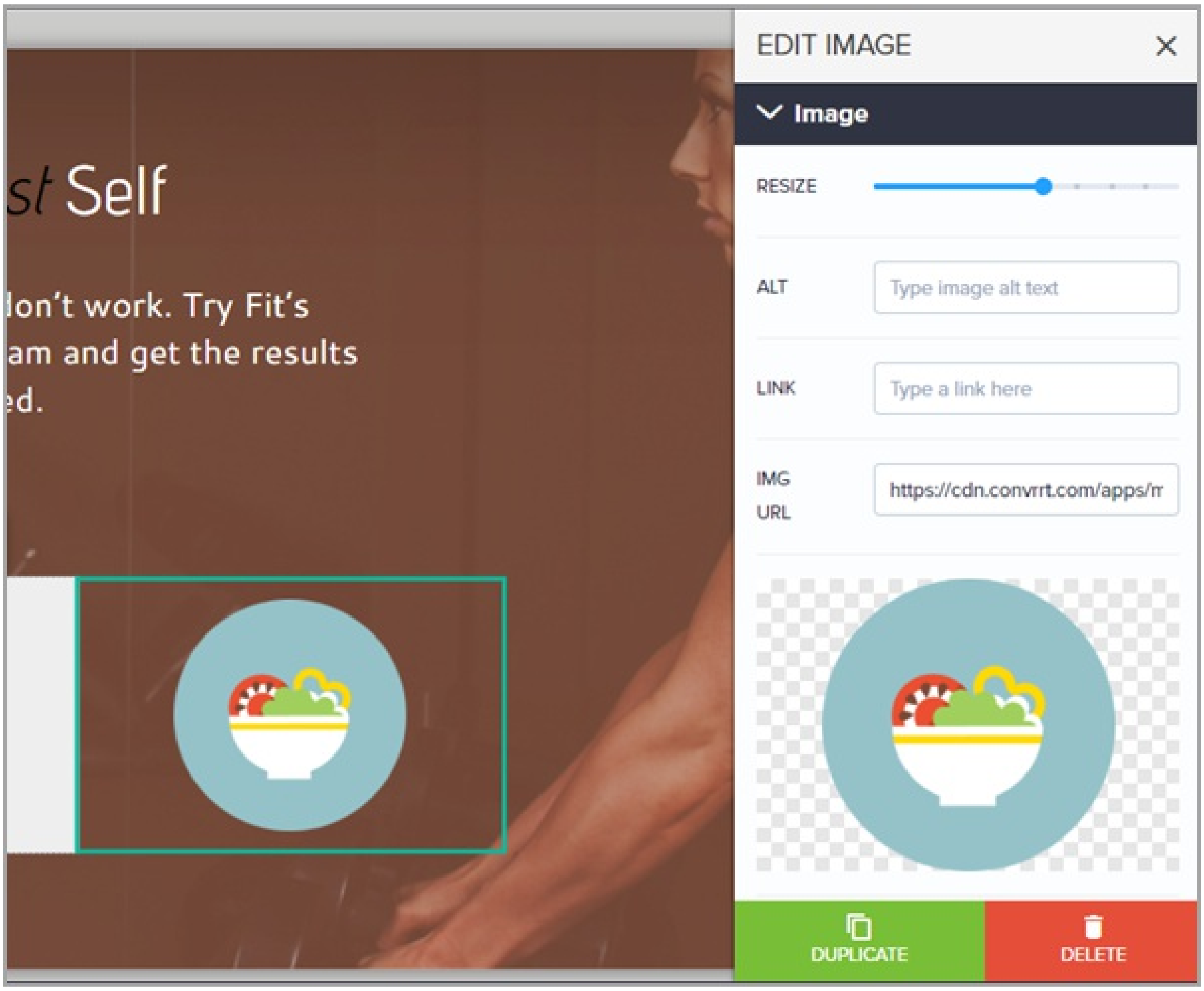
5. Click on **Manage Layout** to navigate and modify your layout by adding sections, rows, columns and elements to your landing page template.



As you hover your mouse over each layout element, it will be highlighted in the editor.

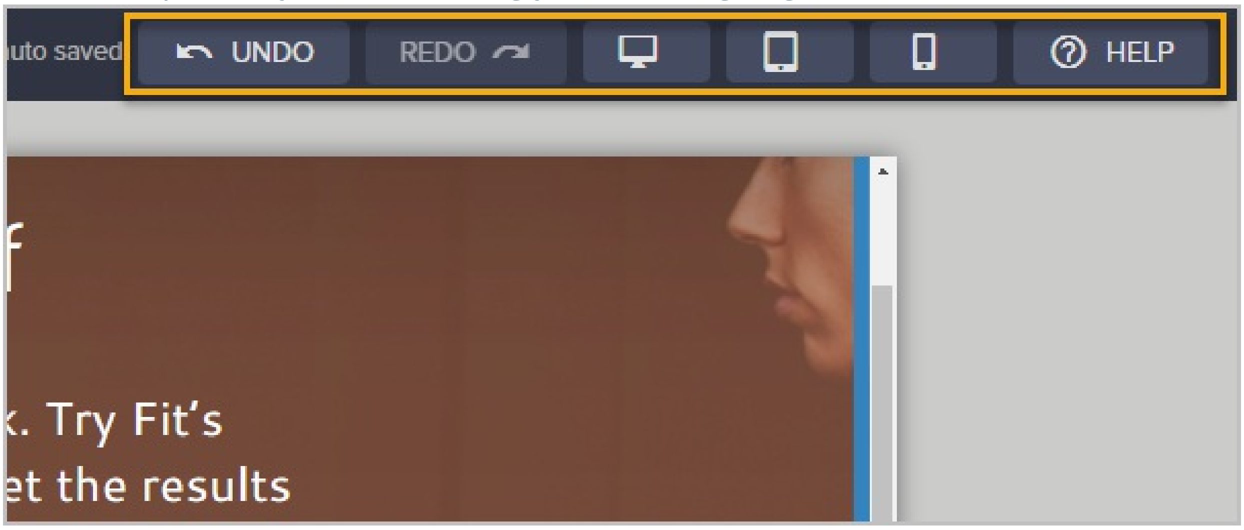


6. Click on an Element to configure it. Choose the element type from the left side of the page and drag it over. Let's add an image element in the bottom row of our Hero section. Note how the configuration panel slides out from the right side of the page when our new element is selected.



7. From left to right:

- You can undo/redo edits that you make,
- Click on an icon to start editing in Desktop View, Tablet View or Mobile View.
- Get live help while you are building your Landing Page.



8. You should now understand the basic structure of a Landing page. In the next article, you'll understand a bit more about how to manage the color scheme throughout your Landing Page.

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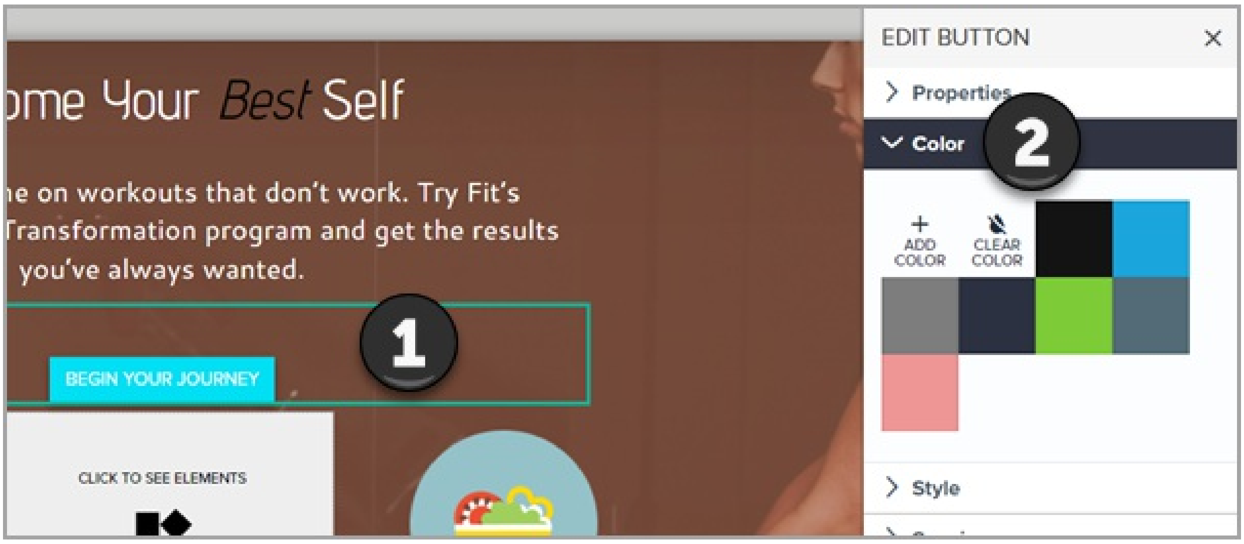
New Landing Pages Managing Color

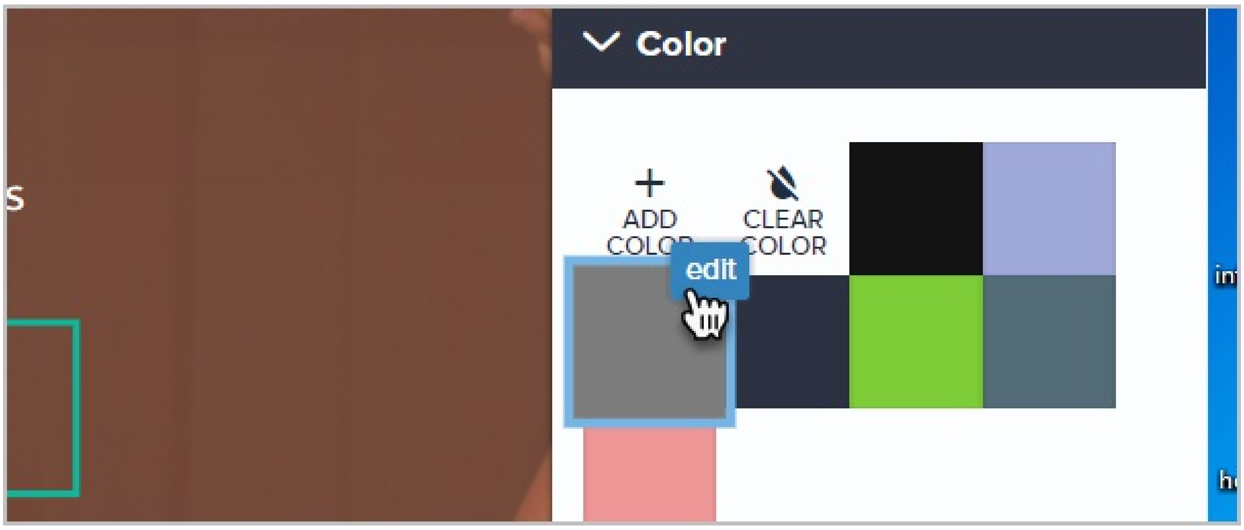
Last Modified on 07/23/2018 2:44 pm MST

1. To add or change the color of a section, a specific element, etc...just click it and you'll have the option to configure the color in the panel to the right of the page



2. You have the option to:

   - Choose a color from the pallet by simply clicking a color icon
   - Change a color on the pallet, but hovering over a color icon and clicking the **Edit** button.
   - Click the **Add Color** button to add a new color to the pallet.
   - **Clear Color** will reset the color of the element.



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Create an Effective Landing Page

Last Modified on 07/23/2018 1:31 pm MST

Guest Author:

Jason Benedict
Infusionsoft Certified Partner
Automation Agency

Let's first start by defining what a landing page is. A landing page is a web page that is published online and should be used to serve a single purpose – to capture and convert leads.

Often referred to as an opt-in page or squeeze page – a landing page is typically used at the beginning of your sales cycle or the top of your online marketing funnel for the sole purpose of lead generation, lead capture, and or re-engagement strategies.

A landing page is one of the most integral pieces of your overall online marketing strategy or marketing funnel to help you convert leads into warm prospects. A high-converting landing page is the centerpiece or foundation to creating a successful lead generation strategy.

A highly effective landing page is targeted, focused, persuasive, concise, builds trust, and grabs the attention of itsvisitor s and compels them to take immediate action through the use of an irresistible offer.

At the Automation Agency, we believe there are 11 key elements that every effective landing page must have in order to successfully convert cold leads into warm prospects and paying clients.

Form A Positive First Impression

The overall look, feel, and design of your landing page will play a critical role in the effectiveness of your opt-in rate and your conversions. Ion Interactive states that people form impressions in just 1/20th of a second, so in this case – looks are everything. Be sure to use eye-catching images that relate to your overall message and make smart use of colors that do not contrast with one another.

Consistency Creates Conversion

Whether you're sending traffic to your landing page from a Facebook ad, email newsletter, or a YouTube video your ability to keep your content, headlines, images, branding, and use of colors consistent will create higher conversions. When your prospects hear the same message, see the same image, and read the same headline (or a slight iteration) throughout each point of contact it psychologically builds a sense of trust, stability, and brand awareness.

Align Your Core Offer With Your Audience

Creating a landing page about your favorite cat video on YouTube and sending an email blast to your list of dog lovers won't yield promising results. Regardless of how cute your cat video is or how stunning your landing page may be – you absolutely must align your core offer with your audience. One of the most important elements of conversion and optimization is ensuring your product or offering properly aligns with your prospects needs, challenges, interests and or behaviors.

Create A Compelling Offer

A compelling offer with a singular focus is the cornerstone to every successful landing page. And every successful landing page has a compelling offer that directly meets the needs of its intended audience or solves a particular problem. An offer is also sometimes referred to as a lead magnet, which can help increase your opt-in conversions. A lead magnet can be something as simple as an email newsletter, coupon, eBook, webinar, video training series, etc. It's basically a free gift that you offer in exchange for their email opt-in.

Killer Headlines Command Attention

The headline of your landing page is typically the first thing visitors will see, so making a killer headline that captivates your audience's attention is a must. Be sure to carry the overall message of your ad copy headline into your landing page copy. This will ensure you're commanding your visitors' attention while continuing to instill trust that you are the expert and authority on the subject matter.

Remove All Exit Opportunities

One of the biggest mistakes we see across numerous ad campaigns is when an advertiser chooses to direct paid traffic to their website or a landing page that is hosted on their website with all of the navigation options still intact (Home Page, About Us, Products, Pricing, Etc.). A landing page should serve a single purpose and that is to get your visitors to submit their information through the opt-in form in exchange for your core offer. Landing page visitors should not have the option to click other pages, review other offers, or navigate away from your primary opt-in page.

Create A Clear Call-To-Action

Every effective landing page has a clear and singular call-to-action (CTA). A call-to-action on a landing page is typically created by the use of a button or opt-in form. A few examples would be: Apply Now, Sign Up, Download Now, Call Now, Buy Now, etc. A visitor to your landing page should know exactly what they are going to get when they take action. If you have too many calls to action or you don't deliver on your promise this can drastically reduce your conversions while also leaving landing page visitors with a distasteful impression of you and your brand.

Use A Mobile Responsive Design

According to comScore, 65% of all digital media is consumed on mobile devices. Smartphones alone have contributed to more than 90 percent of the total increase in minutes spent on digital media since 2013 and now account for just over 54 percent of digital media usage. So what does this mean and how does it affect your landing pages? It's simple really… People don't want to fumble around with a clunky landing page that doesn't automatically adjust the size and layout of your landing page to their mobile device. So make sure your landing page is mobile responsive, easy to navigate, loads quickly and highly focused towards your call-to-action.

Keep Your Opt-In Form Short

It's no secret that reducing your form fields increases your landing page conversions. Are you asking for more than just a first name and email address on your landing page? If so, chances are your conversions are suffering from too many form fields. When it comes to requesting information on your landing page – less is more. Keep your web forms short and simple. We recommend starting with requesting first name and email. Requesting additional fields leaves room for confusion and can sometimes come across pushy. If collecting additional data beyond your prospects first name and email address is necessary we recommend creating a two-step web form. The first step will request minimal data and the second step can request additional fields as needed.

Use An Email Autoresponder Web Form

When someone opts in to receive your free gift or lead magnet on your landing page are they waiting days or weeks on end to actually receive your offer? Or are they receiving this premium gift on autopilot through the use of an email auto-responder? Companies using email to nurture leads generate 50% more sales-ready leads and at 33% lower cost. At the Automation Agency, we leverage the power of Infusionsoft; an all-in-one CRM and email marketing automation software that allows you to quickly and easily deliver your lead magnets on autopilot.

Test & Measure

The last and most important aspect of an effective landing page is the ability to test and measure your overall success. And success for a landing page is typically measured by its conversion. You can measure the effectiveness of your landing page by dividing the number of opt-in's by the number of unique visitors. For example, if your landing page received 1500 unique visitors and you generated 330 opt-in's then your landing page conversion is 22%. Lastly, an effective landing page is one that has been A/B split tested to ensure that all of the above attributes are performing optimally. If your landing page is suffering from less than desirable conversions you've likely overlooked one of the 11 key elements listed within this article.

About Automation Agency: The Automation Agency is a digital marketing agency which was Co-Founded by Jason & Therese Benedict. The Automation Agency helps small businesses to convert cold leads and purchased emails into warm prospects and paying clients. Their cold-list marketing services help businesses from many B2B industries to produce some of the lowest cost-per-acquisition conversions over any other marketing channel. As an Infusionsoft Certified Partner, the Automation Agency also provides marketing conversion strategies and email marketing automation services to small businesses around the world. For more information, visit www.automation.agency

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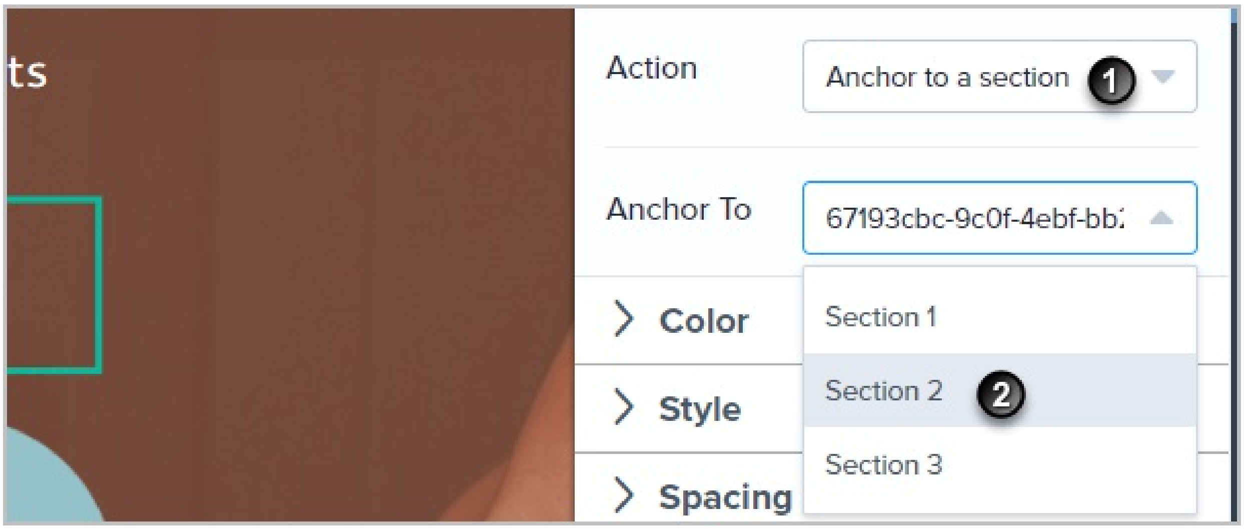
New Landing Pages - Adding Anchors

Last Modified on 07/23/2018 2:45 pm MST

1. Click on the botton, then click on a section you would like to anchor to.



2. Now, when someone clicks this button, it will move them to another section of the Landing Page.

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New Landing Pages - Applying Tags

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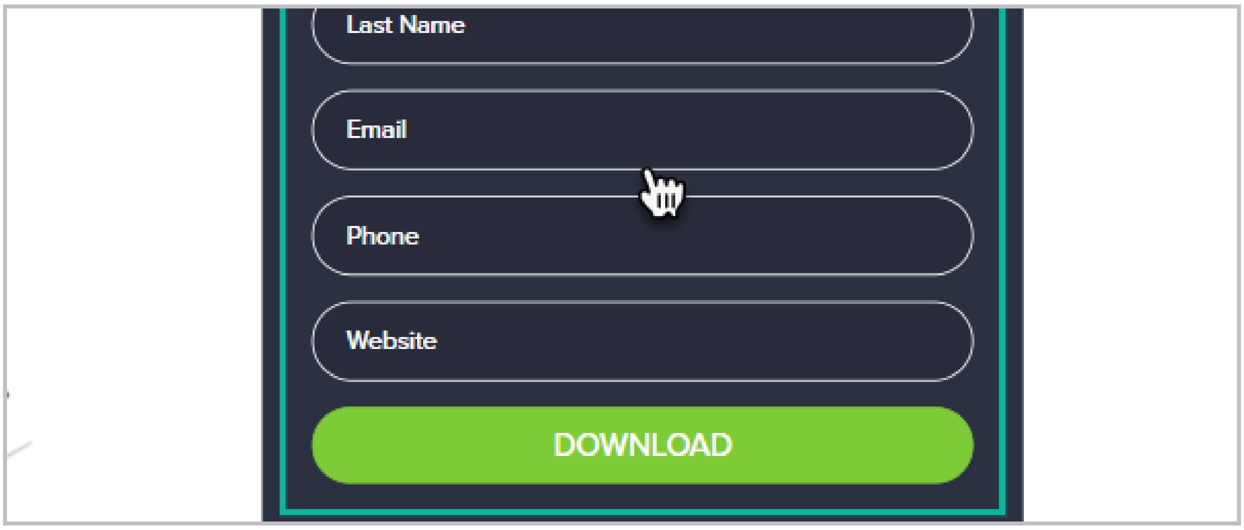
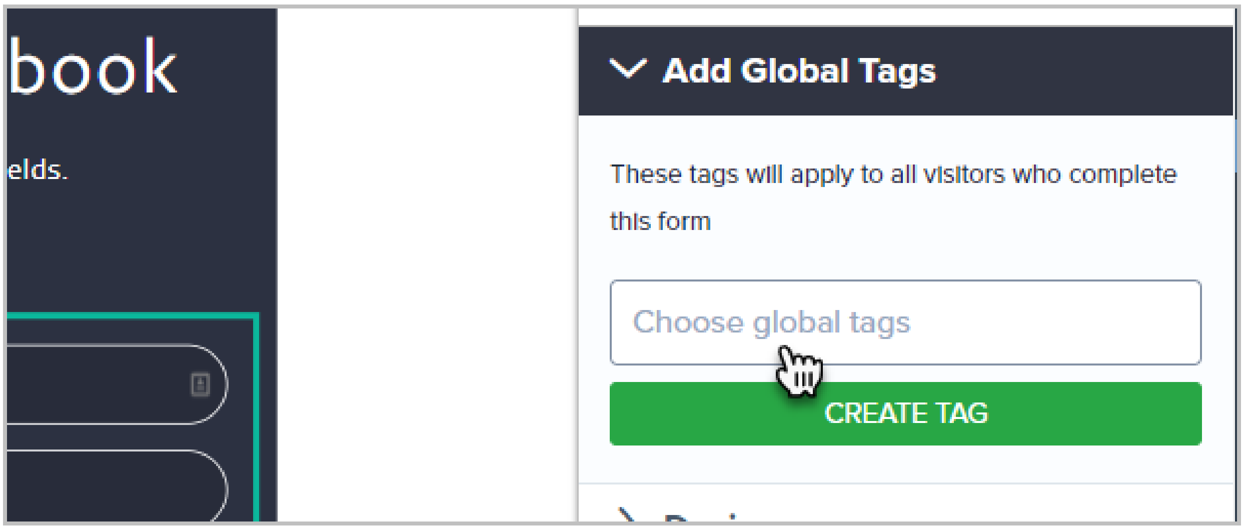
A Global Tag allows you to tag a visitor that submits the landing page.

1. Click on the form element to view the form settings in the panel.

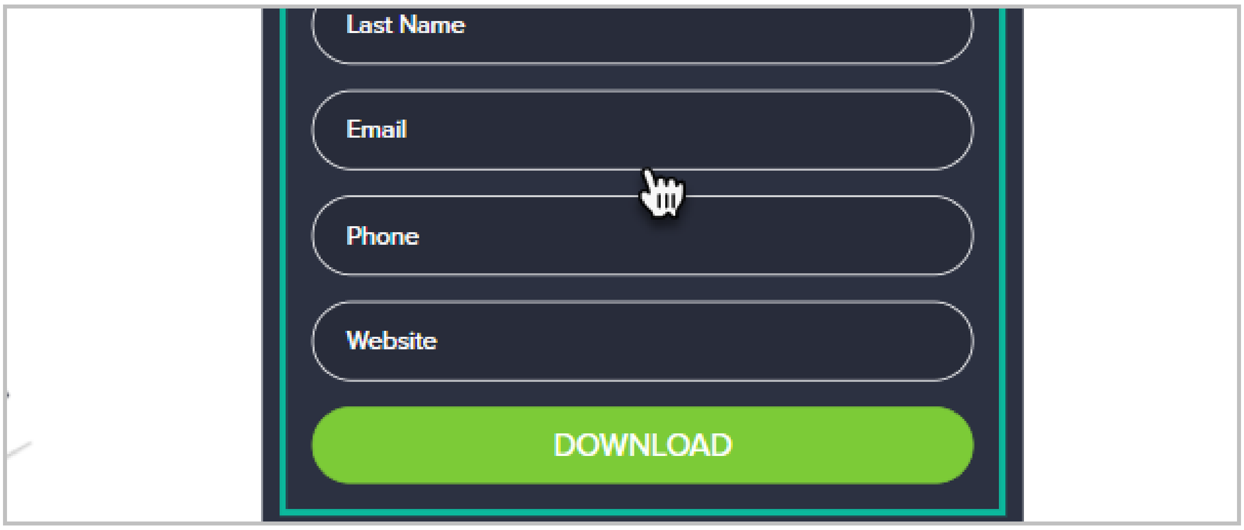


2. Click on Add Global Tags. Here, you can add multiple tags that you want to be applied when a visitor opts-in.



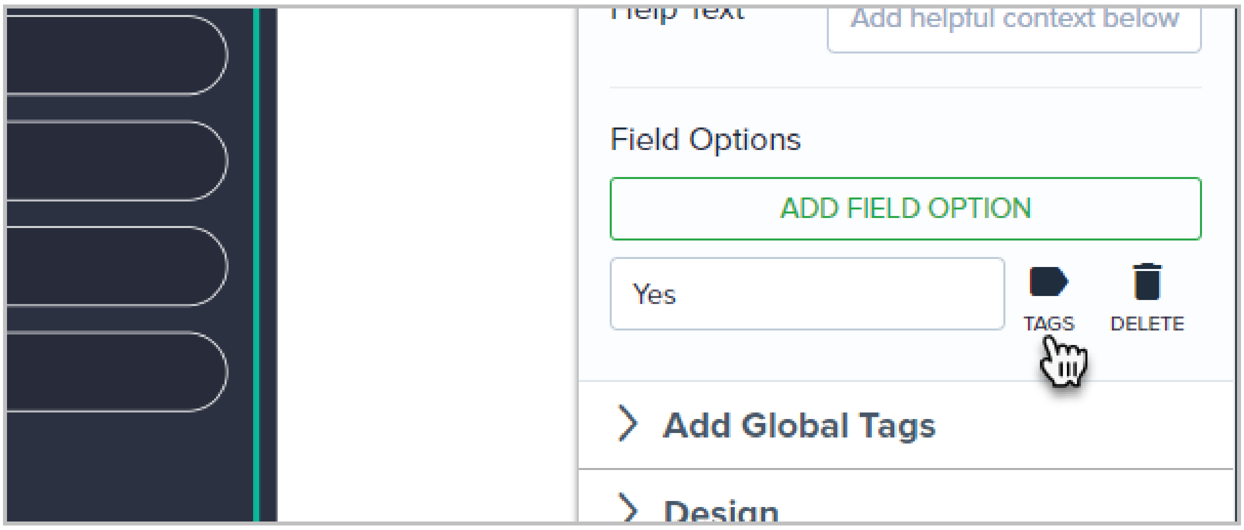
A tag to a form field applies a specific tag based on what checkbox or radio button a visitor selected on the form.

1. Click on the form to open form settings on the Right Edit panel



2. Click on a form field that has options (checkbox or radio buttons)

3. Click the Tags icon to assign ttags to that form field option.



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New Landing Pages - Launching

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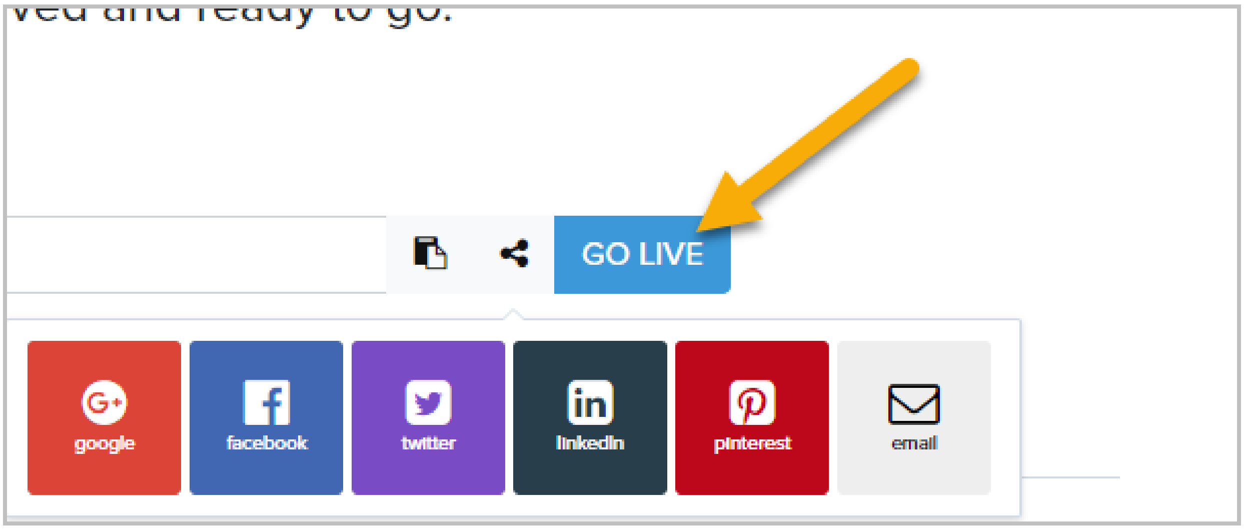
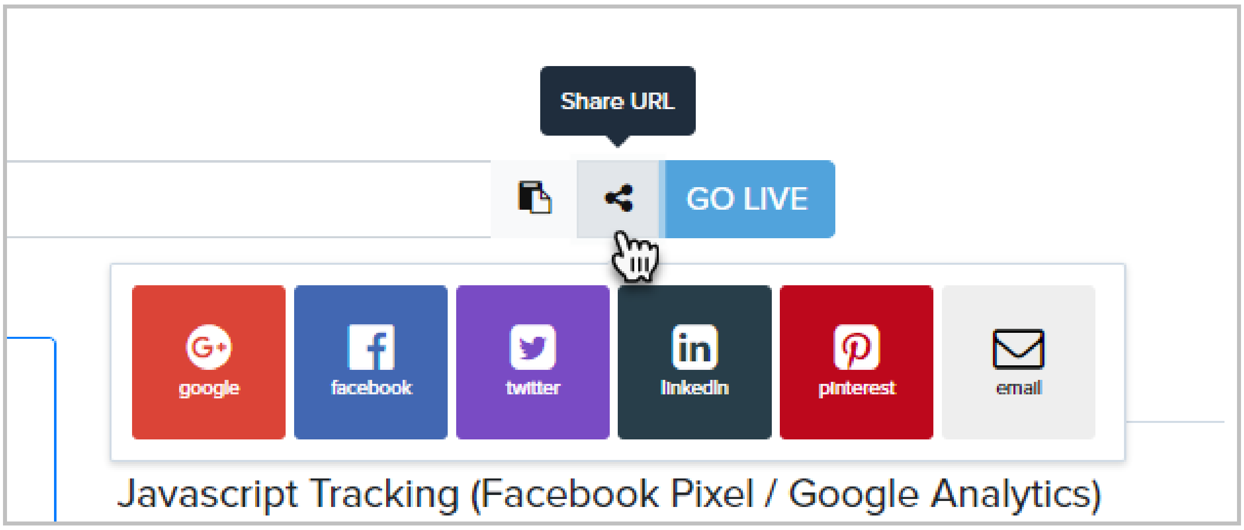
The final step of the Landing Page Builder is deciding how you want to publish it.

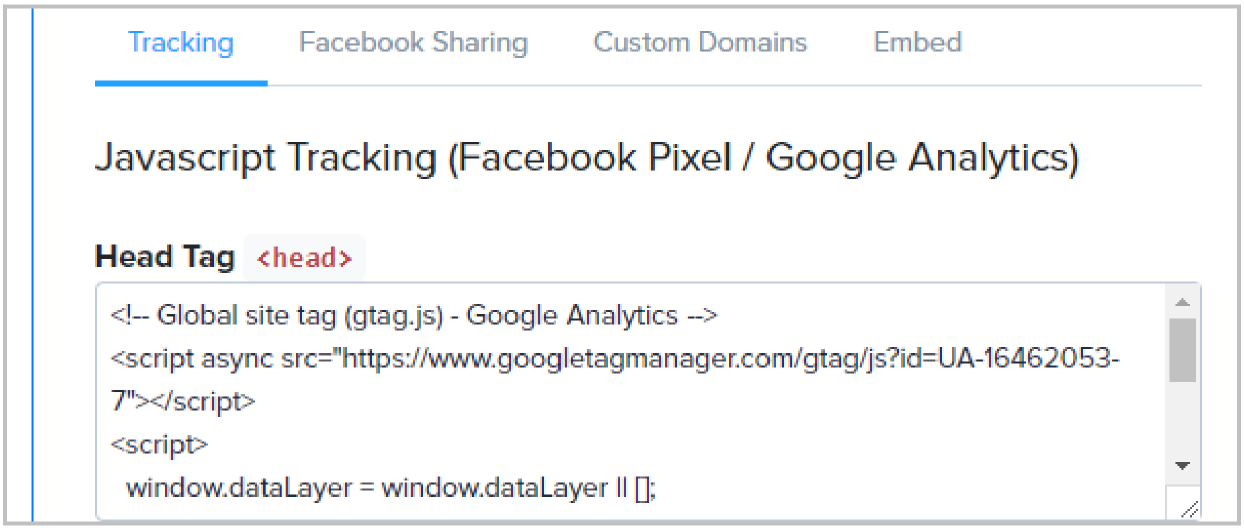
1. Click **Go Live** when you are ready for your new Landing Page to be active.



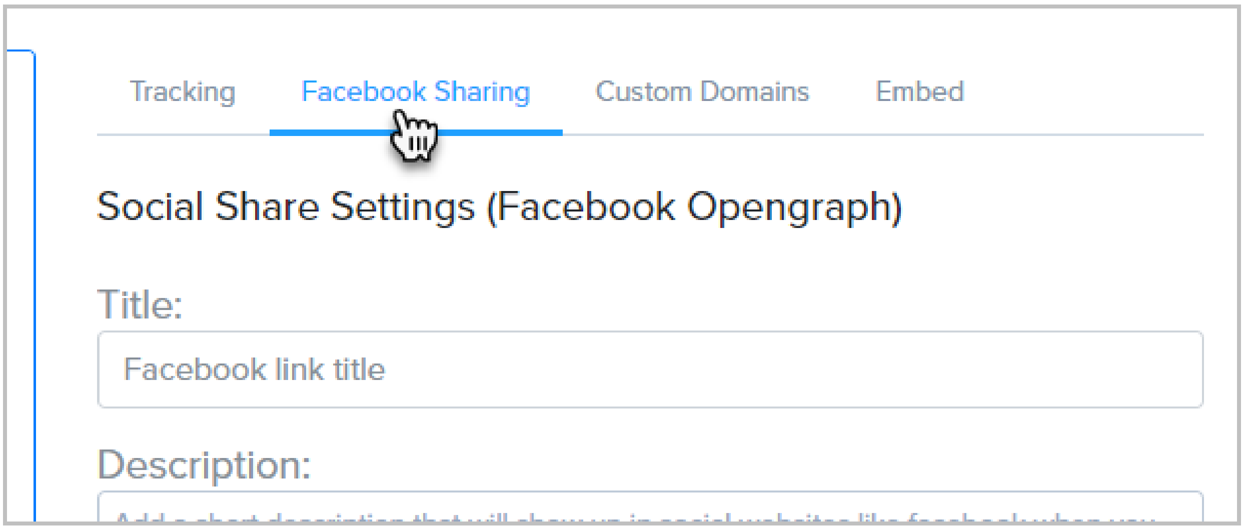
2. Click the **Copy URL to clipboard** button to grab the URL and share it. You can also share it socially by choosing on of the social share buttons.



3. If you have a Google Analytics account or if you use Facebook Pixel , you can add your tracking code in this section.



4. You can create a custom Facebook ad with a title, description and image here.



5. Configure a Custom Domain

   If you would rather use your own doamin or subdomain instead of the randomly generated URL, you can change that here. Our custom domain feature is the easiest way to publish your pages to a custom or sub domain. Once it's set up, you can publish any Infusionsoft New Landing Page to a custom domain or subdomain, e.g. http://yourpersonaldomain.com/ or http://uniquename.yourpersonaldomain.com/.

   1. Just enter your desired domain and click **Connect**.
   2. Follow the instructions carefully in the pop-up modal, then click**Verify**.

6. Embed the Landing Page using an

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New Landing Pages - Custom URL Parameters

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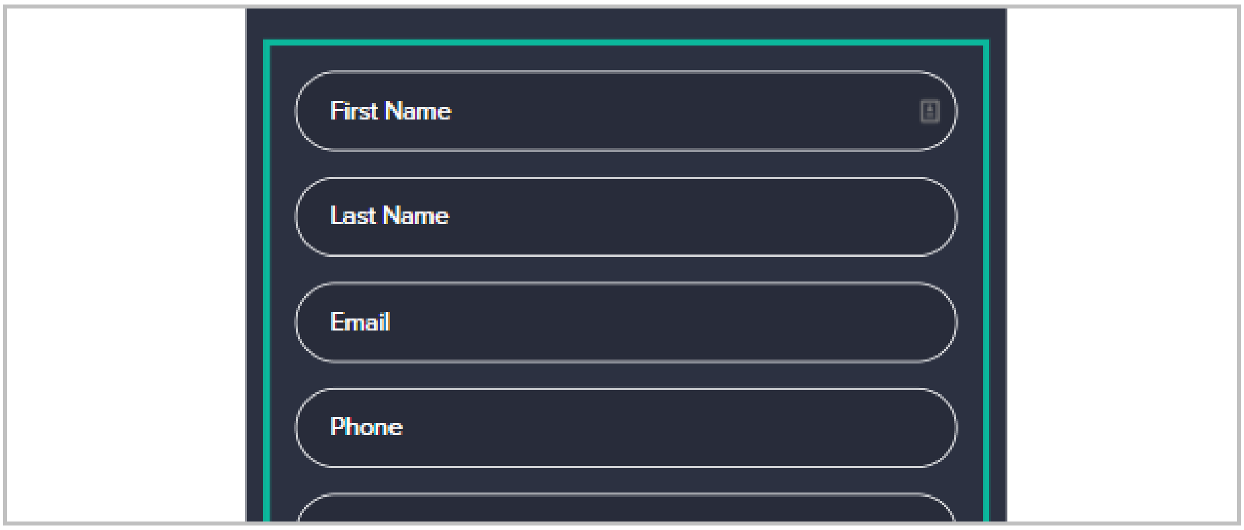
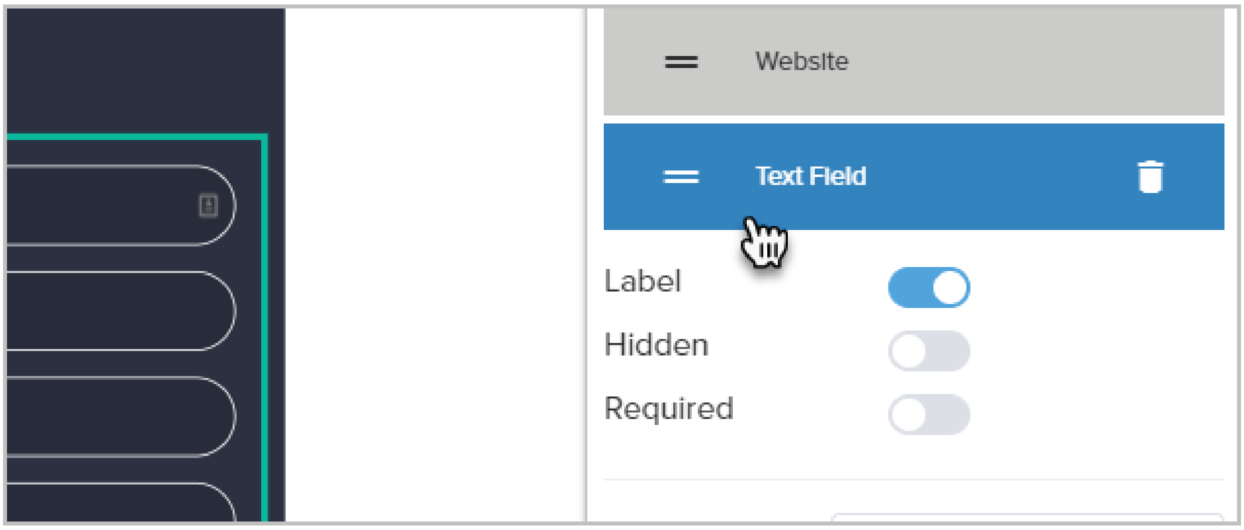
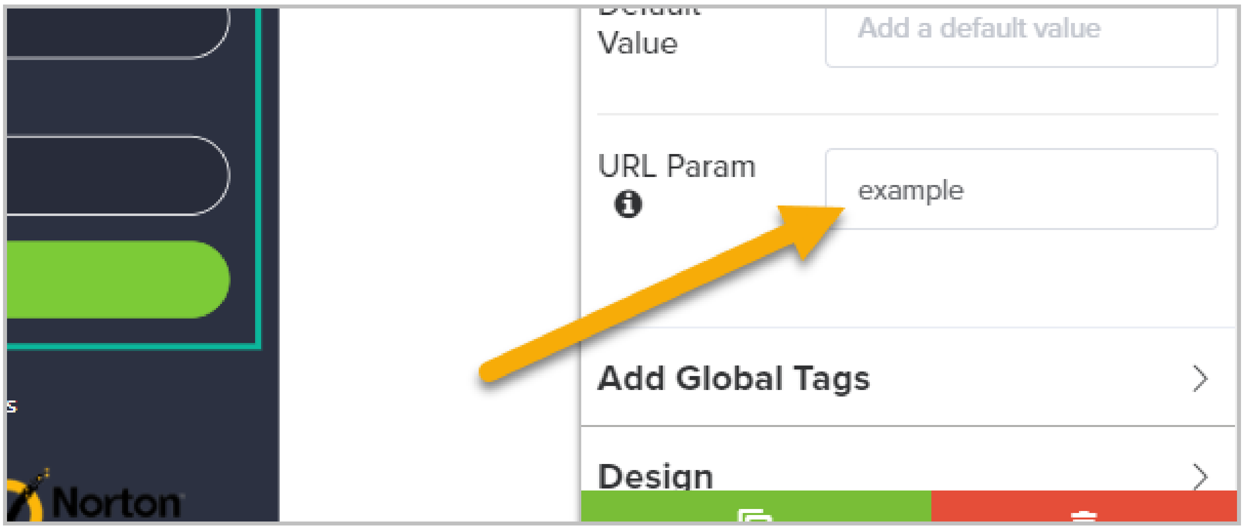
1. Click on the form you would like to modify



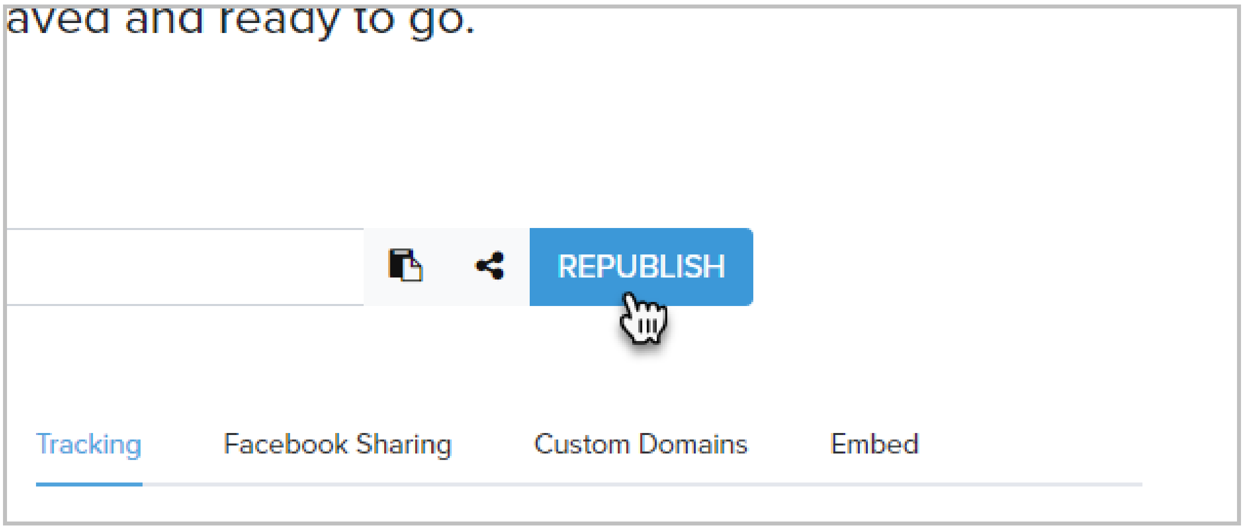
2. Click the field that you would like to auto-populate



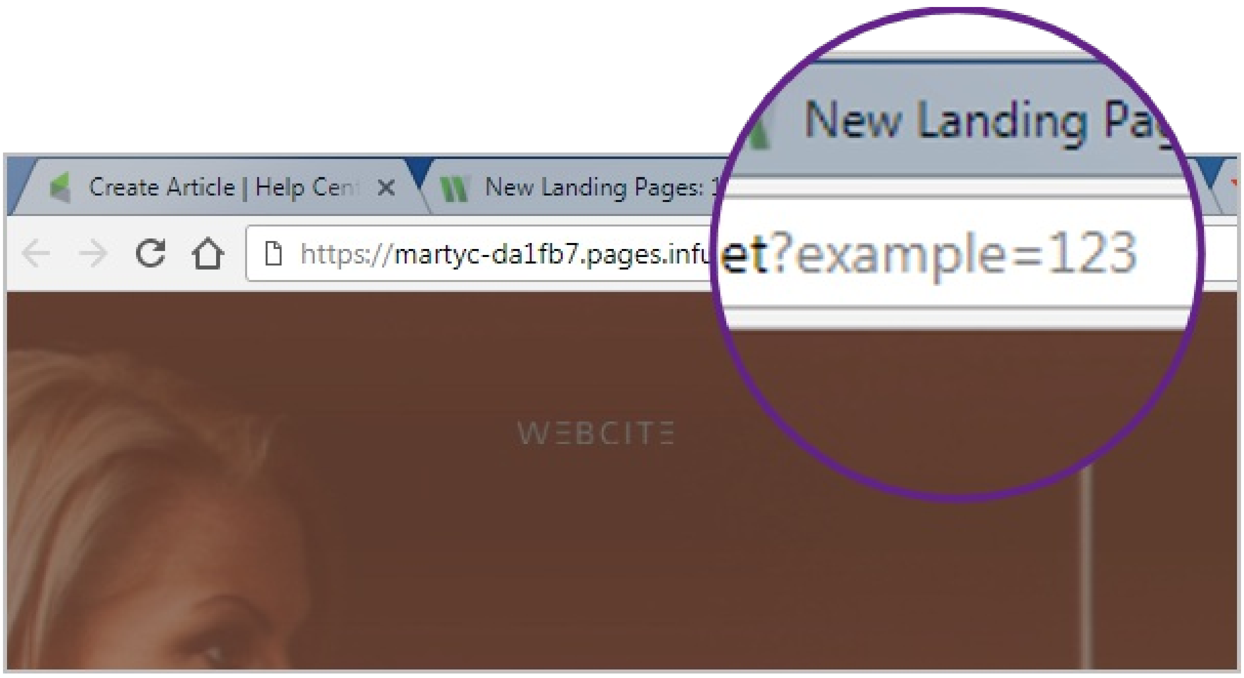
3. Enter the name of a URL parameter you would like to use



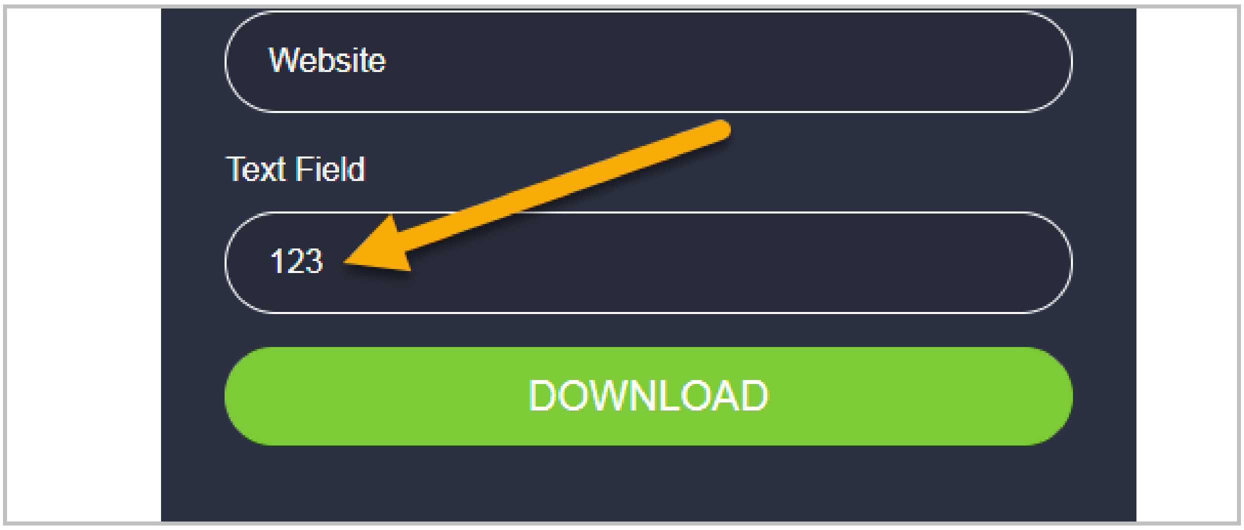
4. Publish (or Republish) the landing page



5. Test it out by entering your URL parameter and value in the format as shown in the example below



6. Note the field is now pre-filled with the value



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New Landing Pages - Hidden Fields

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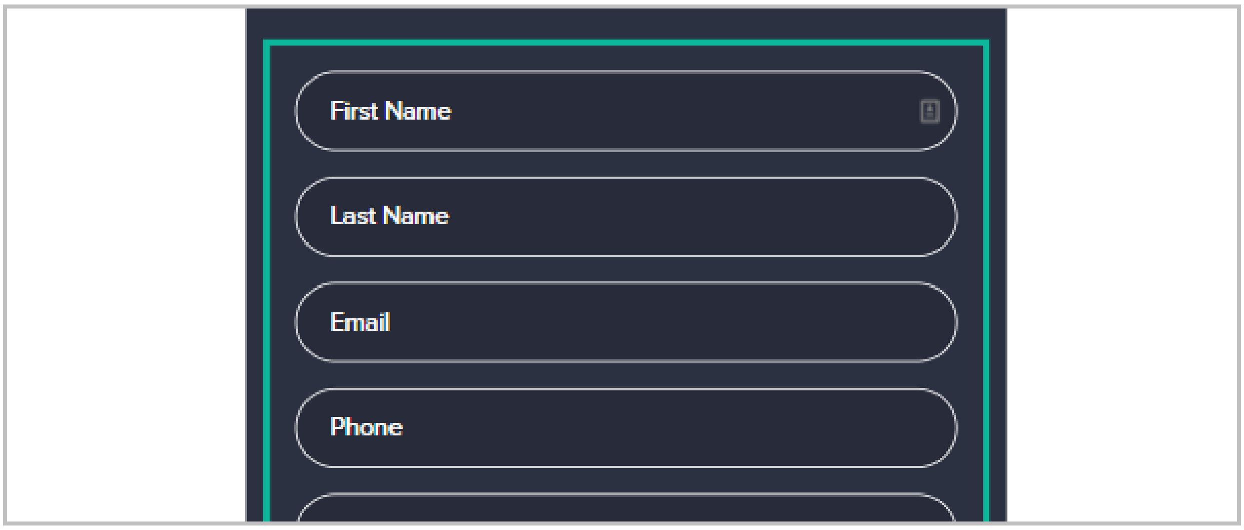
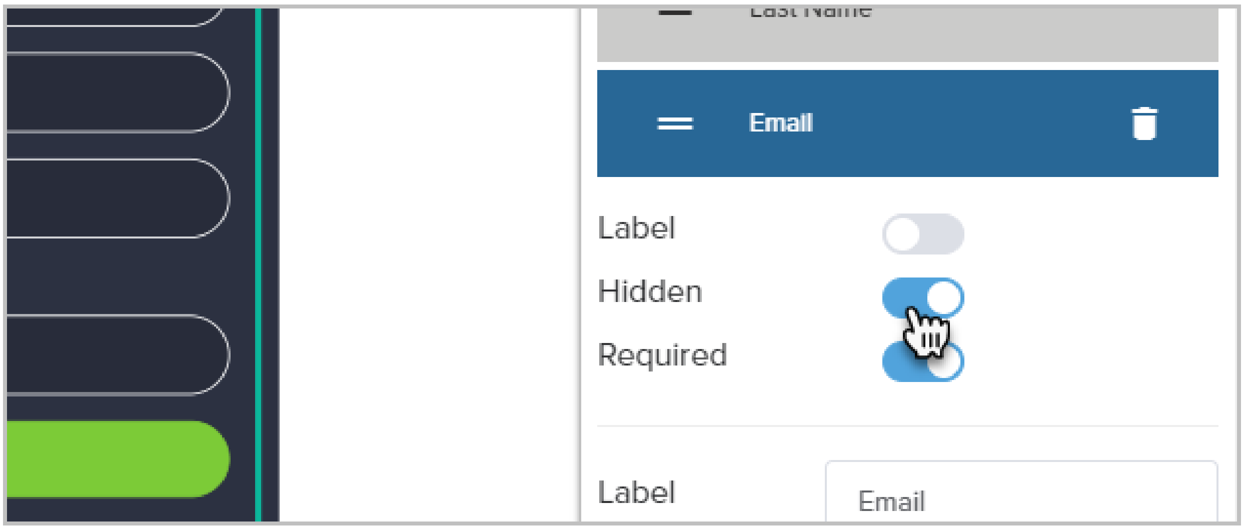
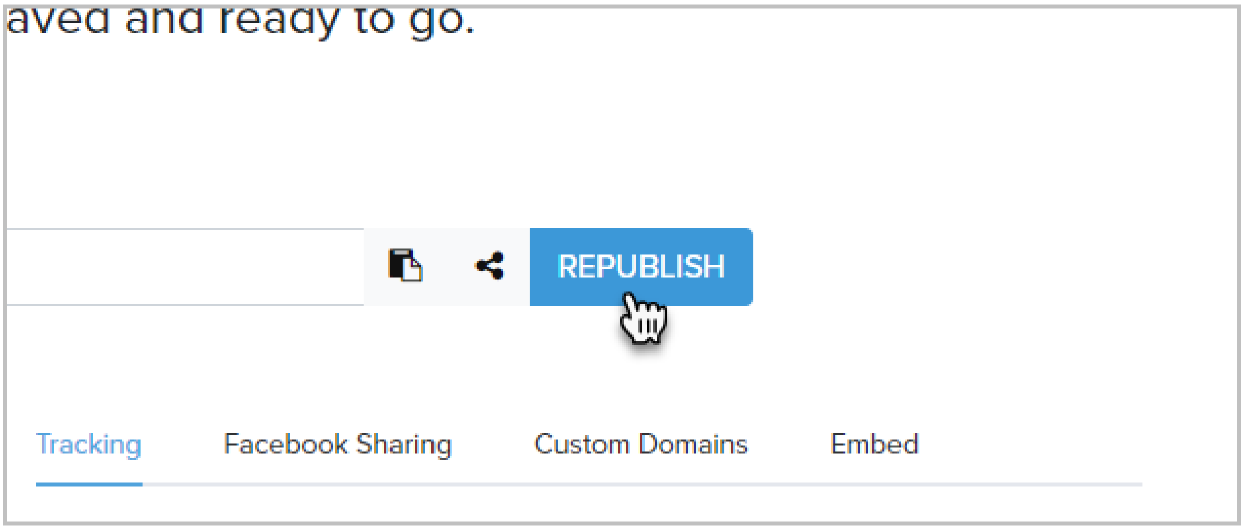
1. Click on the form you would like to change



2. Click on the field you would like to change and enable the**Hidden** slider.



3. Be sure to republish your Landing Page


aved and ready to go.
REPUBLISH
Tracking
Facebook Sharing
Custom Domains
Embed

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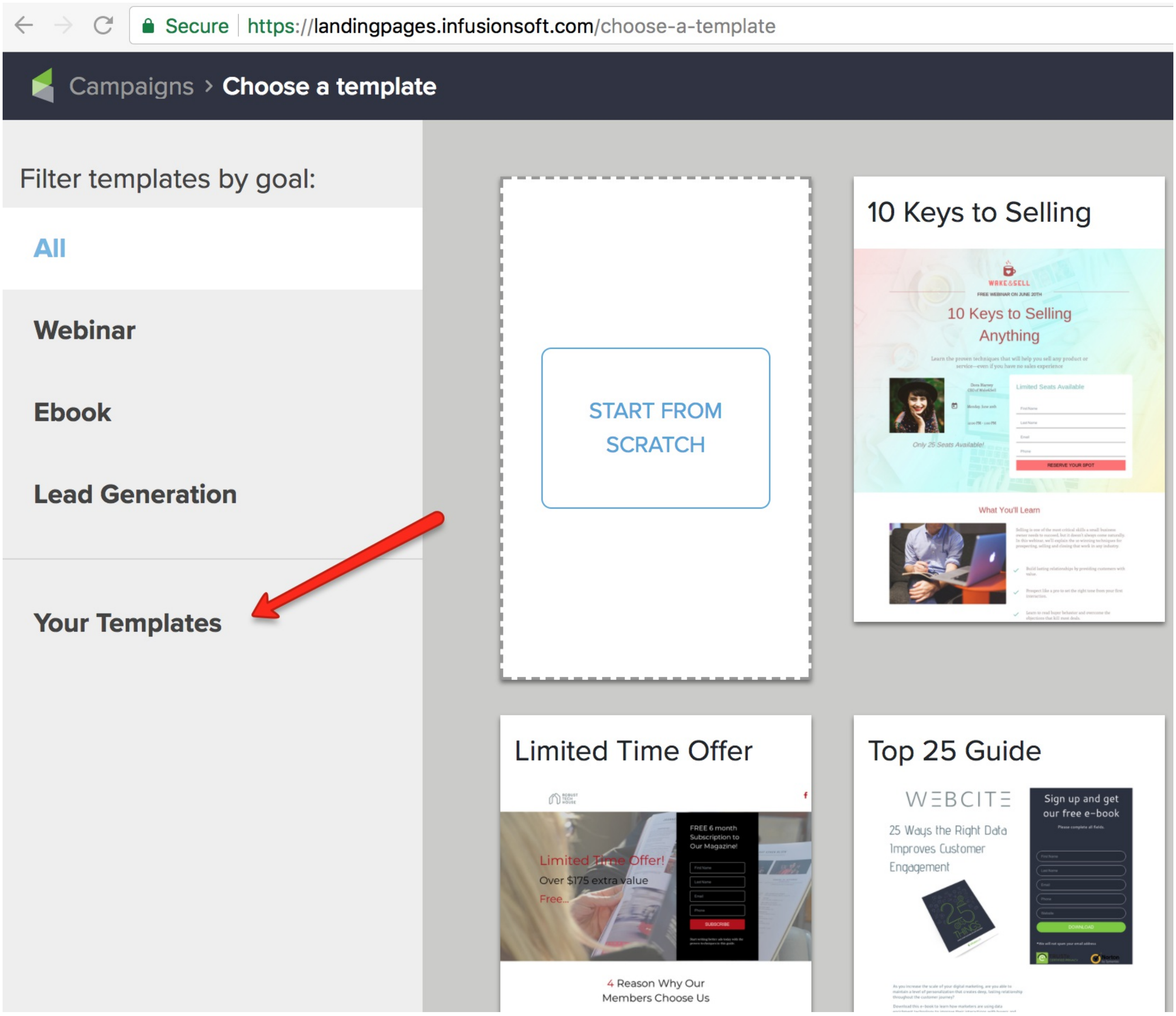
New Landing Pages - Archive Templates

Last Modified on 07/23/2018 2:46 pm MST

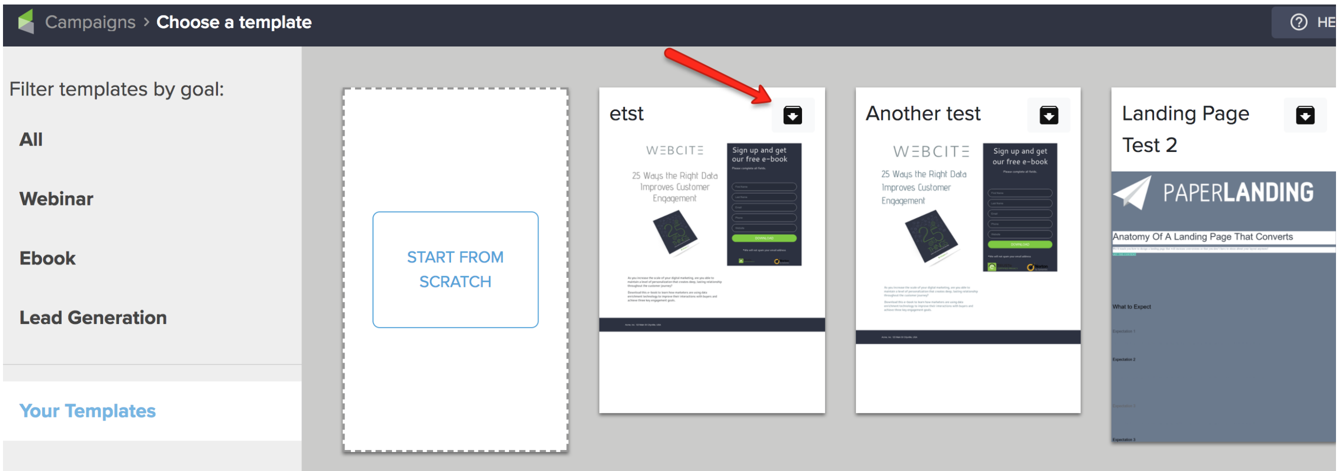
With the New Landing Page builder in Infusionsoft, you have the ability to archive your previous templates that are stored in the **Your Templates** section of the template selector. This feature is designed to assist with cleaning up your view of previous templates that you have created. Follow the steps below to archive previously created templates.

1. Campaign Builder, drag in a New Landing Page goal, and double click to enter the template selection screen

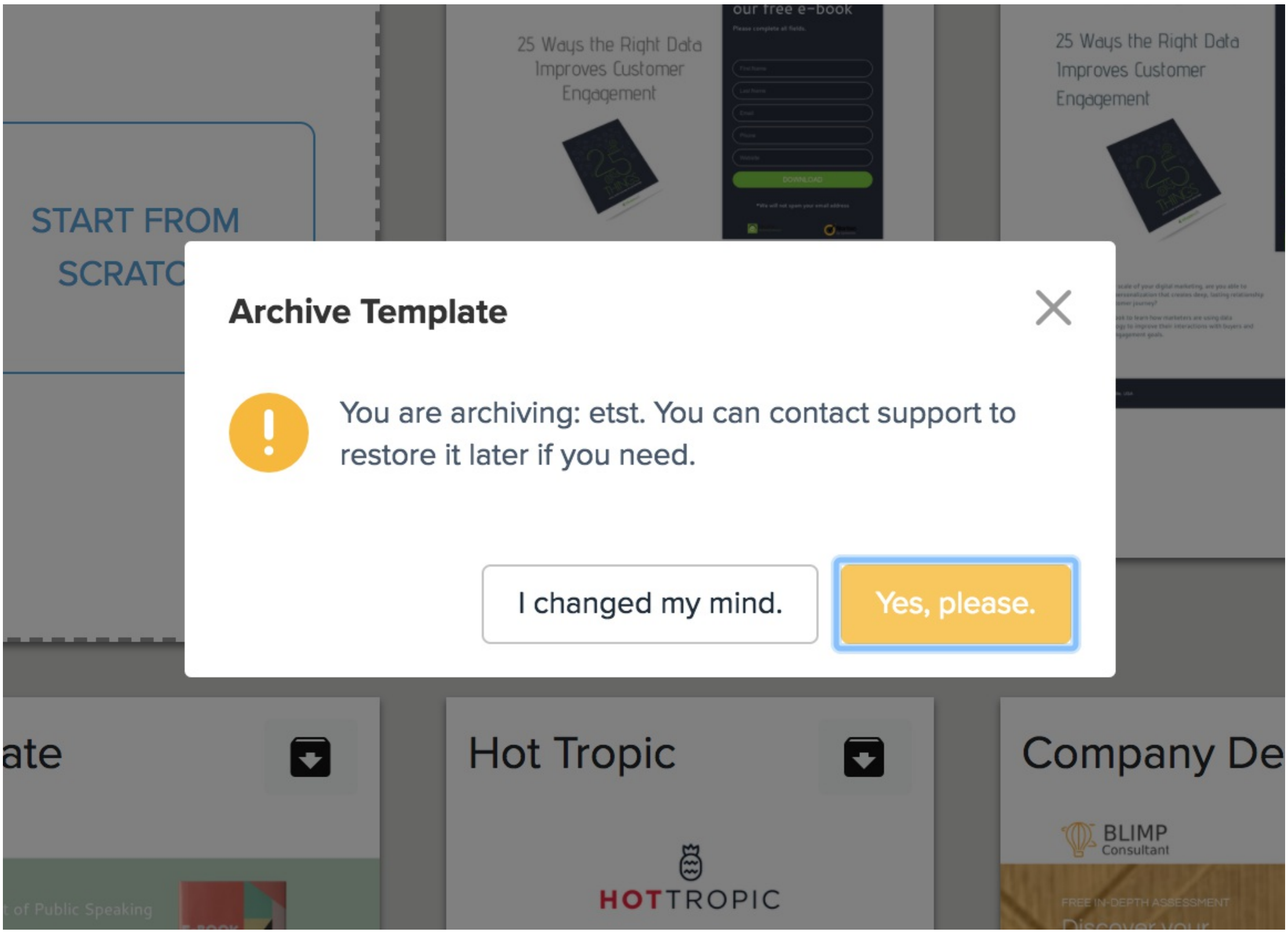
2. From the left menu, select **Your Templates**



3. Click the **Archive** button above a template that needs to be archived.



4. Confirm the selection in the pop-up.



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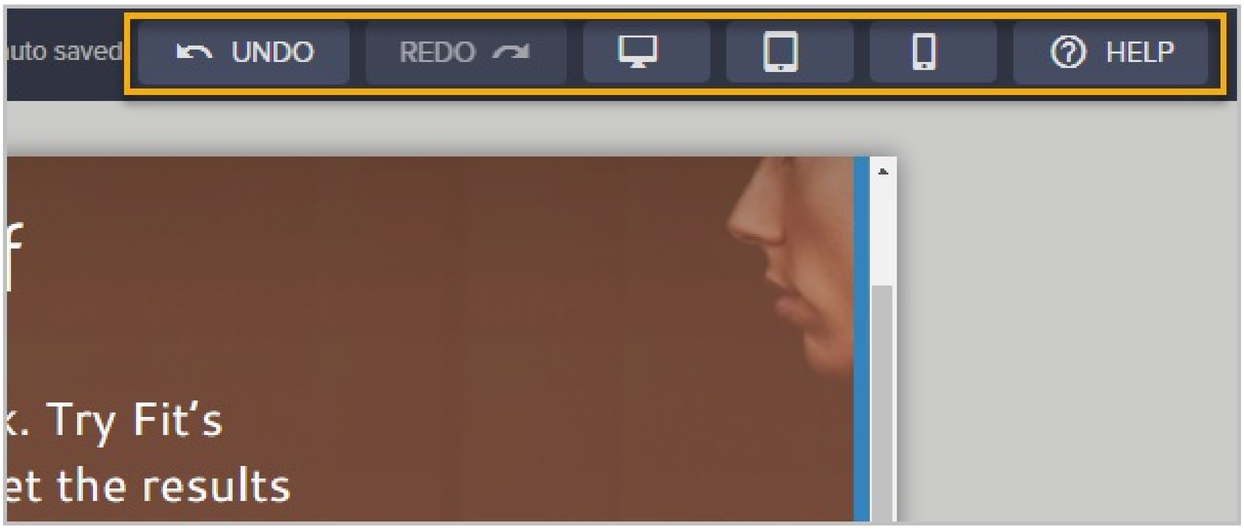
New Landing Pages - Mobile Editing

Last Modified on 07/23/2018 2:47 pm MST

You have the ability to have three separate designs for each Landing Page based on what device is viewing it. Use the buttons at the top to change the design for Desktop, Tablet and Mobile devices. For example, if you click on the mobile icon and make changes, those changes won't be applied when viewed on a desktop or tablet device.



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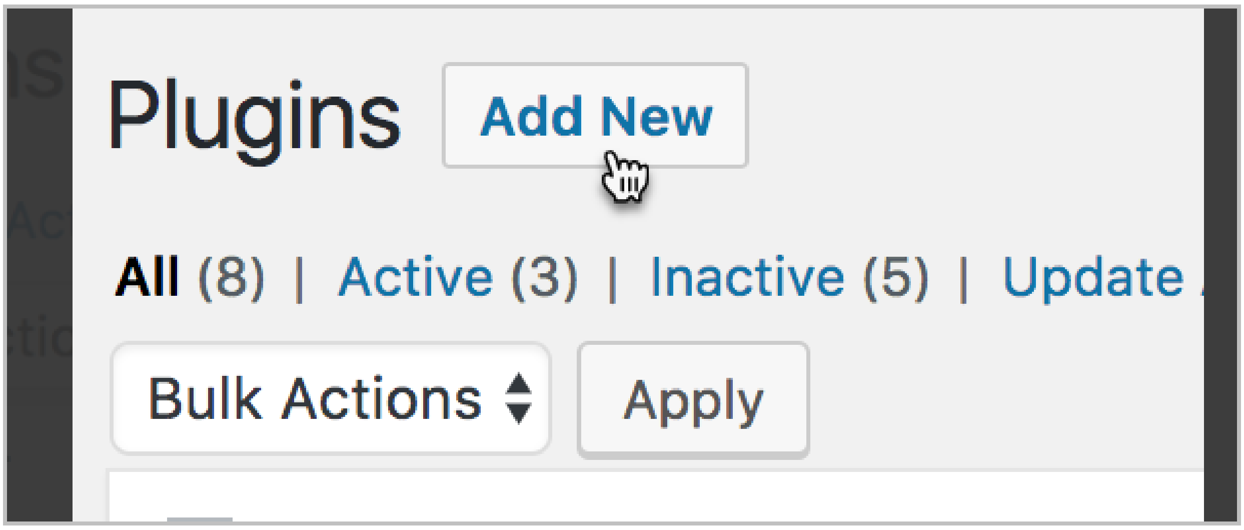
New Landing Pages - WordPress Plugin

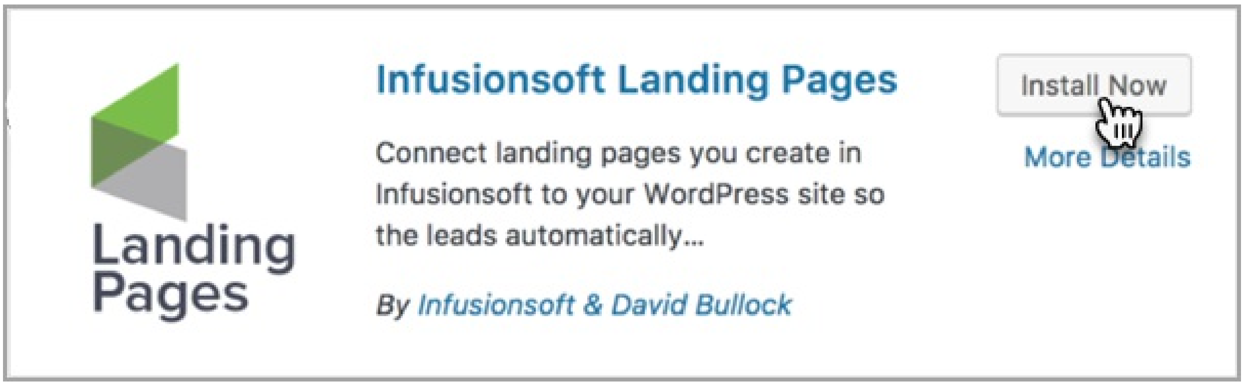
Last Modified on 07/23/2018 2:47 pm MST

You can display your Infusionsoft Landing Page in your WordPress website. You can assign any domain name you own to the landing page. It will give the appearance that the page exists on your website.

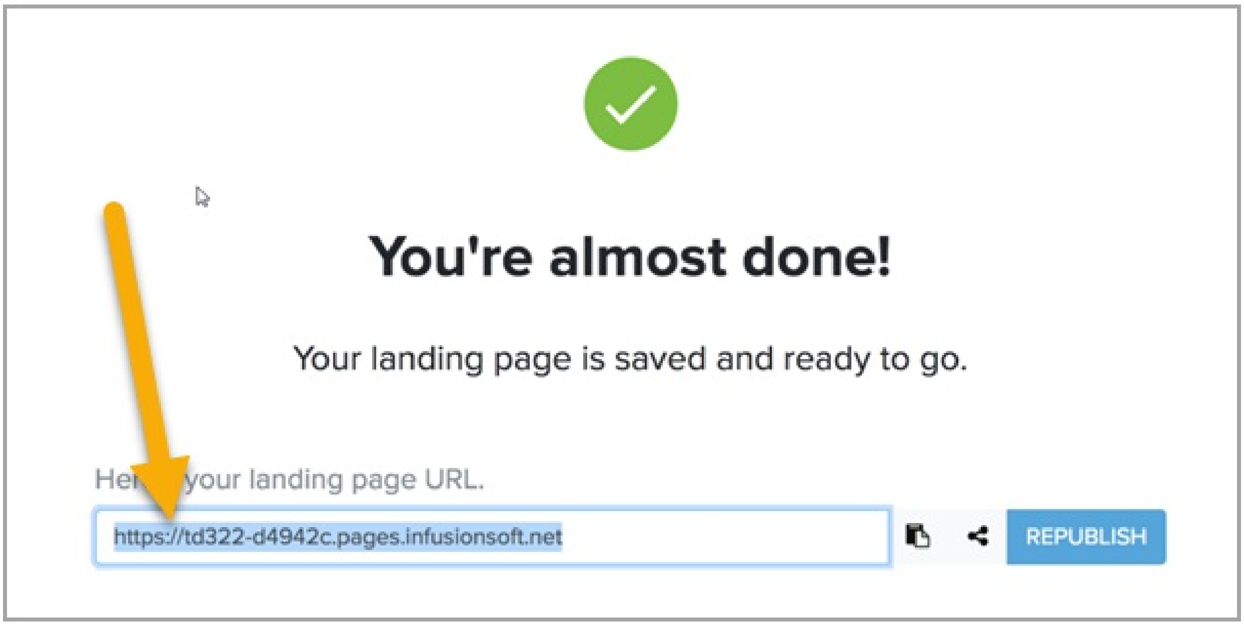
1. Log in to your WordPress website
2. Click **Plugins**
3. Click **Add New**



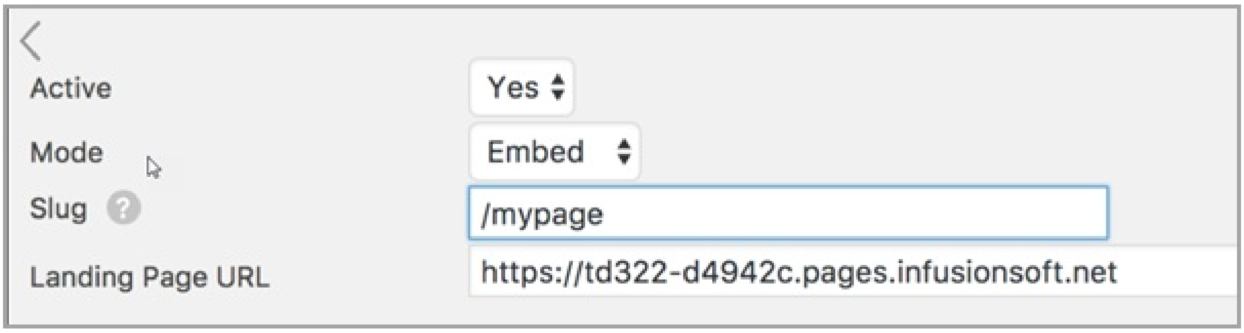
4. Search for "Infusionsoft Landing Pages"
5. Click **Install Now** on the plugin listing page. Once installed, the WordPress plugin can be found under **Settings**.



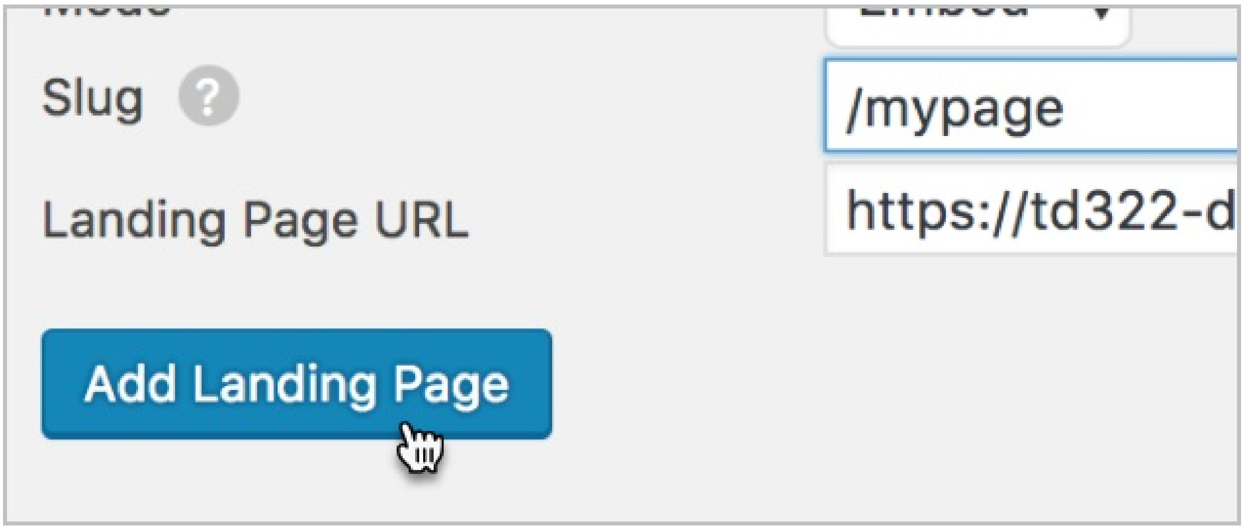
6. Grab the URL of a landing page you've created in Infusionsoft



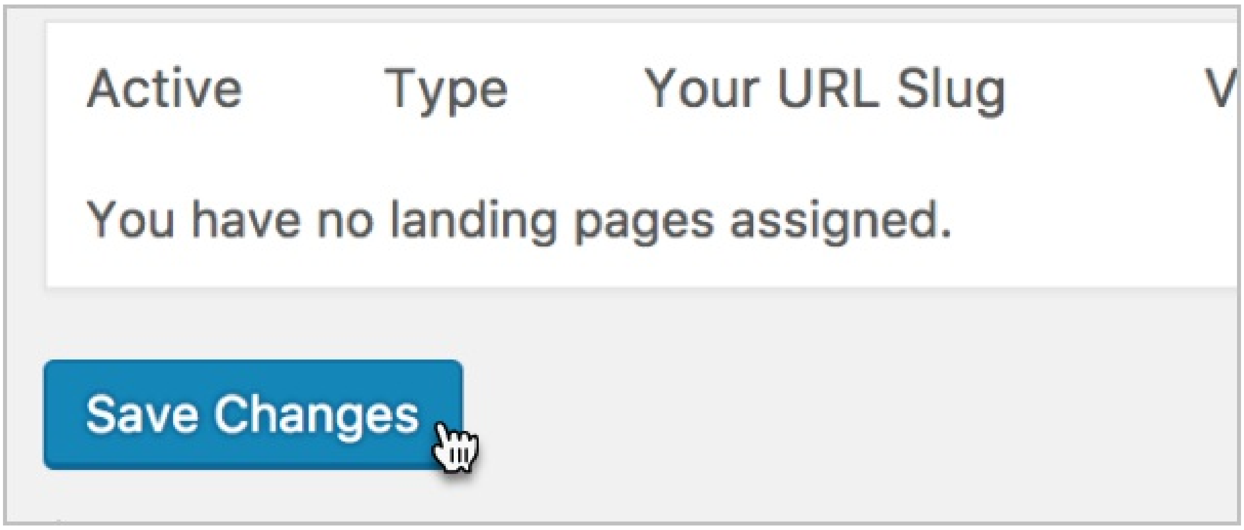
7. Paste the URL and add a Slug. The URL is what you copied from Infusionsoft. The Slug is the page name that you would like to use on your WordPress website. Just note that it can't use an existing page name you already have published.



8. Click **Add Landing Page**



9. Click **Save Changes**



10. Click **View** to see the page!

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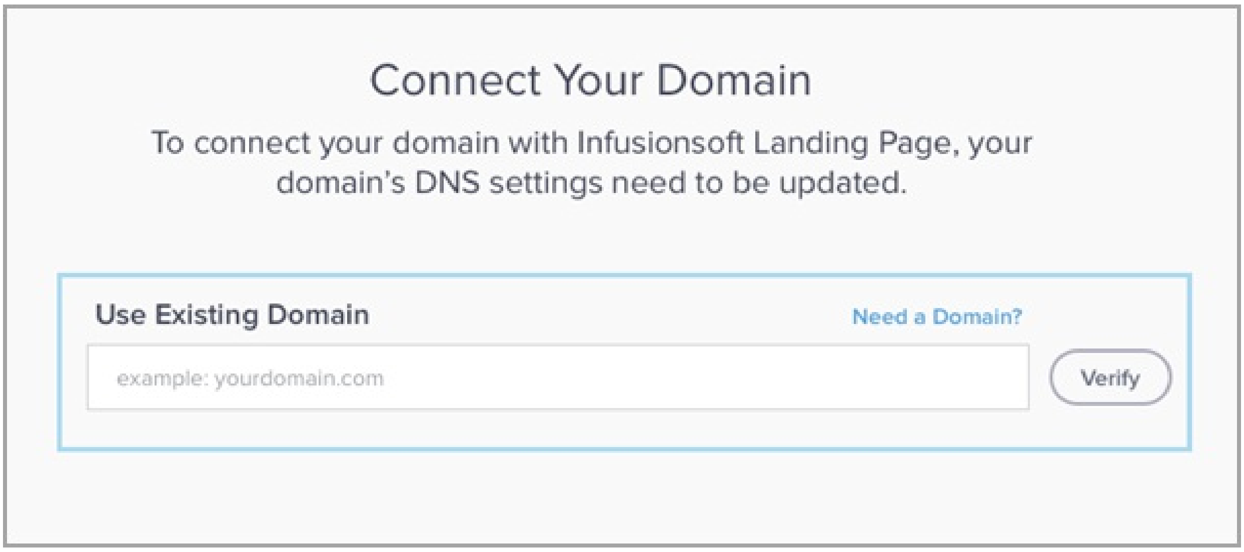
Connect Your Domain to a Landing Page

Last Modified on 07/23/2018 2:48 pm MST

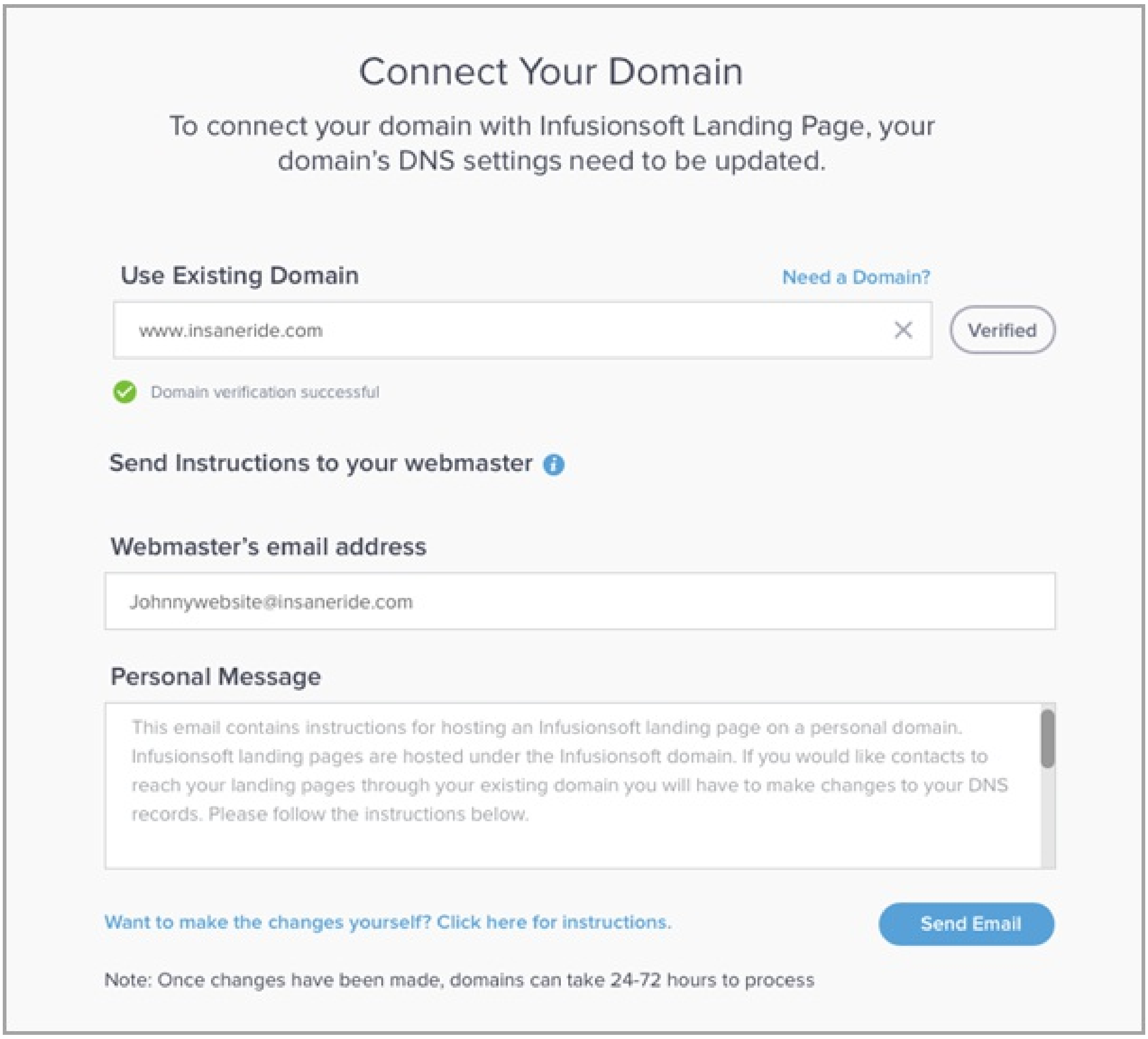
Infusionsoft landing pages are hosted under the Infusionsoft domain. If you would like contacts to reach your landing pages through your existing domain, you will have to make changes to your DNS records. Please use the following instructions below:

Adding Your Domain to Your Landing Page

1. In your landing page domain field. Add your domain to the input field and verify.



2. Once the domain is verified, send the instructions to your webmaster. This will allow you to commit your domain to the landing page you have selected.



3. Landing Page is now ready to be connected. You will need to update your domain information with your registrar using the steps below:

Configuring your domain with Registrar

1. Create a 'sub domain' as a 'CNAME' record pointing to 'yourapp.infusionsoft.com'

2. If you want your Infusionsoft Landing Page to be the main page on your domain, then you will need to configure a 301 permanent redirect from the apex or root domain to the sub domain above.

3. This prevents users from having to explicitly type the latter and will prevent search engines from creating colliding canonical URLs.

4. DNS settings for this setup would look something like this:

1. '@ forwards 301 to www'
2. 'www CNAME yourapp.infusionsoft.com'

Please note that Infusionsoft has no control of your domain's settings and cannot provide assistance with DNS changes. Once DNS changes are made, it may take up to 72 hours for changes to propagate. For any troubleshooting assistance, please contact your web developer and/or domain registrar.

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Landing Pages FAQs

Last Modified on 07/23/2018 3:04 pm MST

How do I edit text?

Simply highlight the text you'd like to edit and use the right panel to change the color, font and sizing. The highlight disappears while you're editing, but will still adjust the text.

What is Manage Layout used for?

Manage Layout allows you to navigate directly to the section, row, and column you'd like to edit. You can also add sections, rows, and columns from this area.

How does Add Elements work?

The Add Elements button on the left gives you the items that you can drag & drop onto the page. Click the element, drag to its intended location, wait for a blue highlight and drop!

How do I delete an element?

You can click on the element and tap the Delete button at the bottom of the right side panel, or, if you're using a PC you can right click on an element to delete. On a Mac, hold Ctrl + Click, to access the delete option.

How do I duplicate an element?

You can click on the element and tap the Duplicate button at the bottom right side panel, or, if you're using a PC you can right click on the element to duplicate. On a Mac, hold Ctrl + Click, to access the duplicate option.

How do I move an element if I drop it in the wrong place?

You can simply grab, drag, and drop that element in in its intended location. Look for the blue highlights to drop the element.

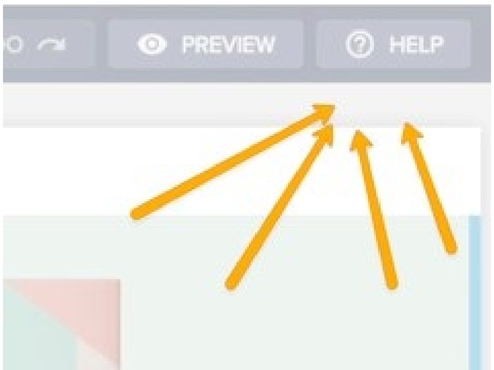
How do I increase spacing in between 2 items on the page?

To change spacing vertically, click on the item and adjust Margin and Padding. To change spacing horizontally, click on the section and widen the section by selecting "Edge to Edge".

Does 'Go Live" publish my landing page?

Yes, Go Live publishes only your landing page. Your campaign will have to be published separately if you have other goals and sequences you're editing. However, the landing page can stand alone and collect leads, whether the campaign is published or not, as long as the landing page is published.

For Further Assistance, please use the "help" button located at the top right of the landing page editor



In the event that these FAQs do not provide you with the information you need, during this limited release, we want to connect customers directly to the team that is building our New Landing Pages. To receive the best answers to your questions, tap the help button located at the top right of the landing page editor. This will allow you to chat directly with the team and ensure your questions get resolved, in the quickest way possible.

Using a different version of Infusionsoft? Click Here to learn more

Publish A Landing Page To A Custom Domain

Last Modified on 07/23/2018 1:26 pm MST

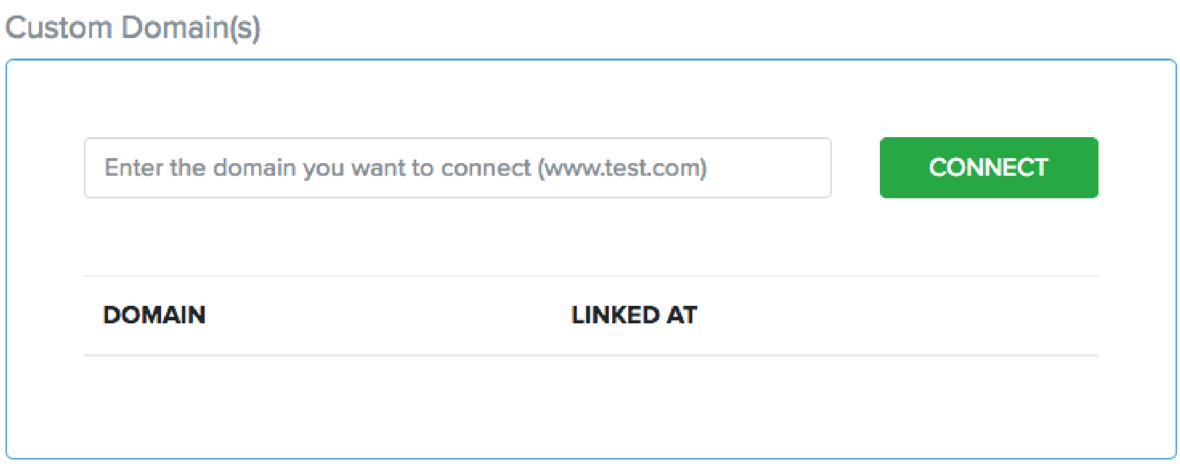
By default, all pages hosted by Infusionsoft are published to a URL that shows infusionsoft.net in the address. For example, https://29jfwi.landingpages.net/your-page-name. These URLs are automatically secured by SSL.

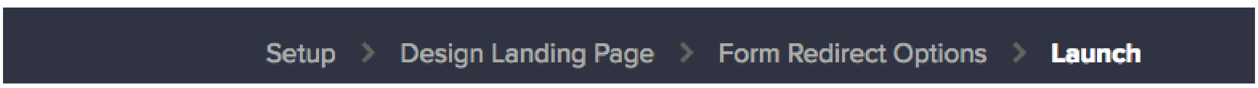
Our custom domain feature is the easiest way to publish your pages to a custom or sub domain. Once it's set up, you can publish any Infusionsoft New Landing Page to a custom domain or subdomain, e.g. http://yourpersonaldomain.com/ or http://uniquename.yourpersonaldomain.com/

1. Add your domain to Infusionsoft

    1. After building your landing page, click **NEXT** to get to the **Launch** page.

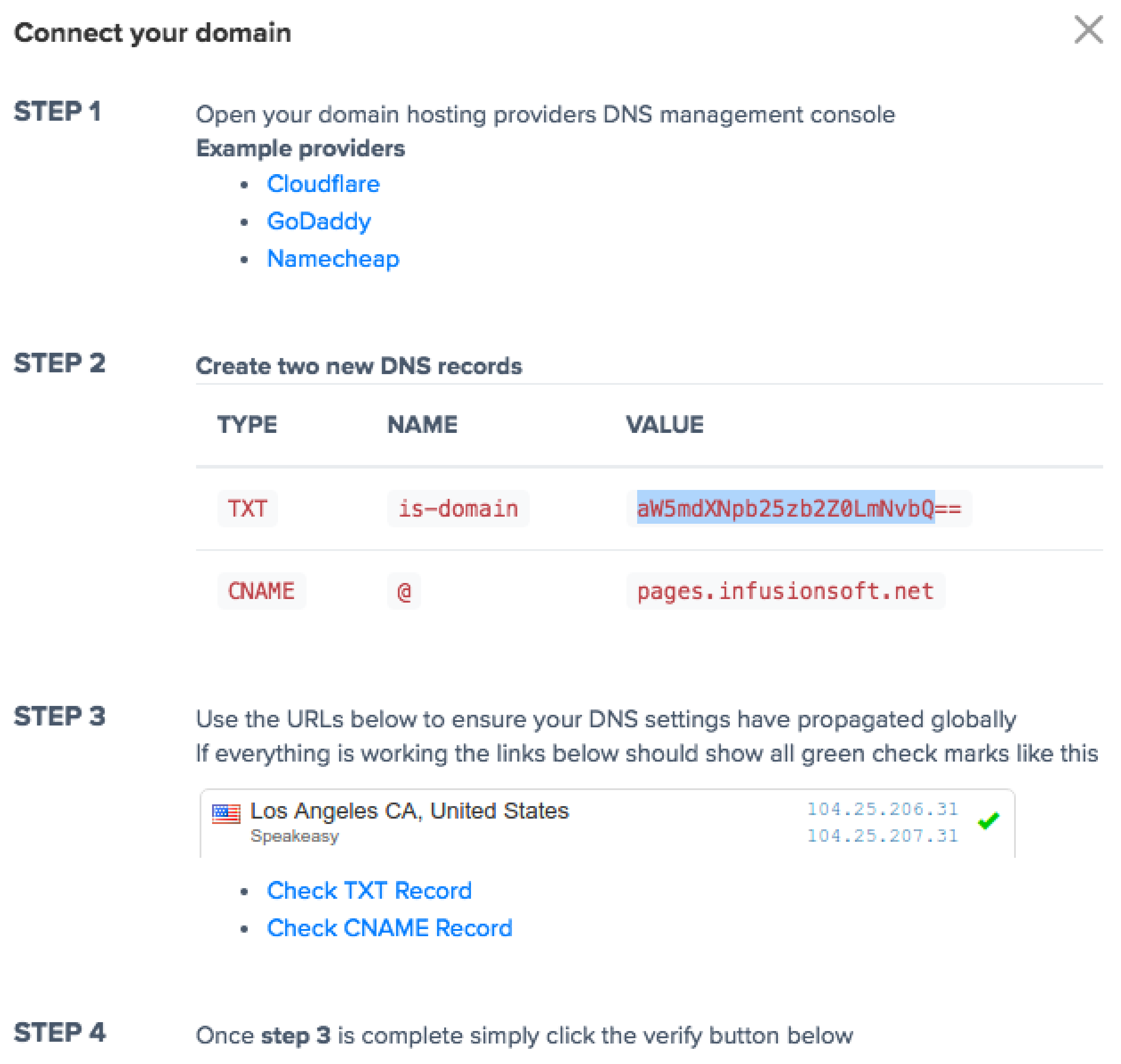
    2. Scroll to the bottom and you will see a section to add custom domains. Start by entering the domain you want your landing page set up on. It can either be on your subdomain (name.yourrootdomain.com) or root domain (yourrootdomain.com.)



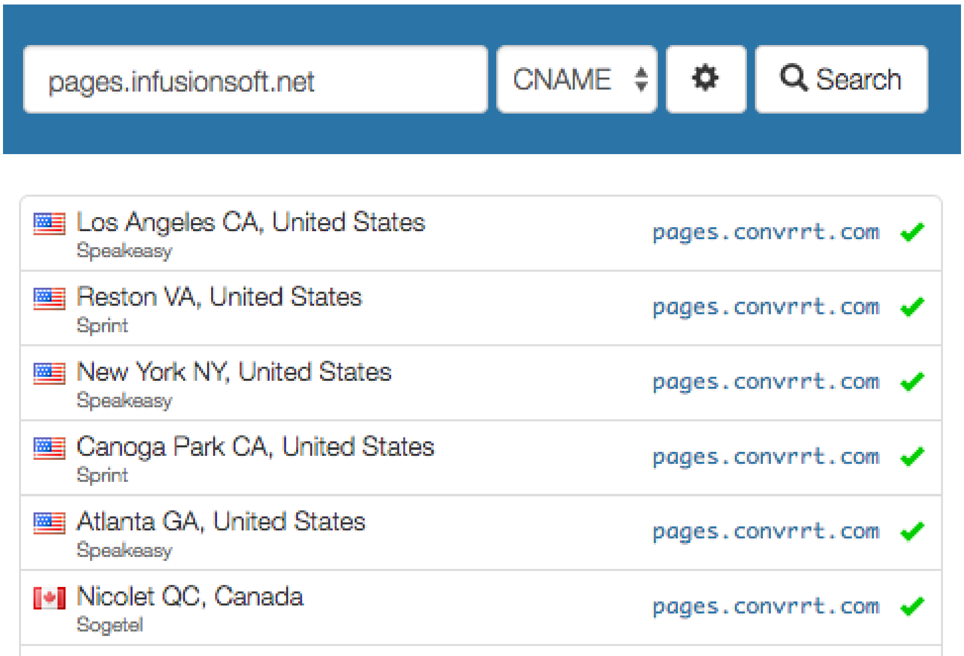


2. Connect and verify your domain

1. After you have entered your domain and hit **CONNECT** you will see a modal window appear with a set of instructions to follow.



2. Once you have set your TXT and CNAME records, Run a CNAME check to see if it has propagated. Click here to run a check on your records. (Results should look something like the image below.)

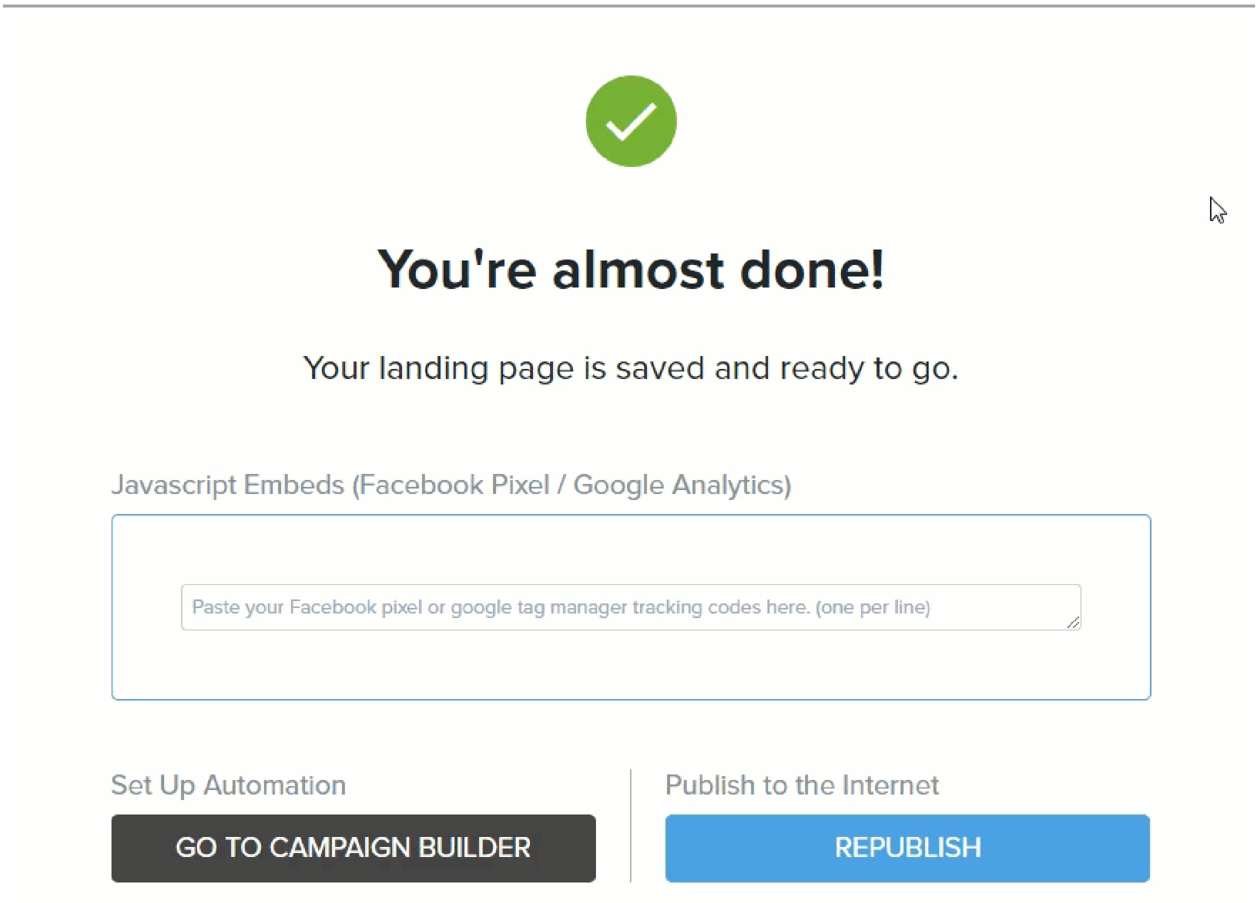


3. Optional Option B - iframe embed

   If you would like to embed your published landing page on your site, via an iframe, as opposed to connecting your domain via the steps above, this too is an option.

   1. Publish your landing page, or navigate to the **Launch** step of an already active landing page

   2. Scroll down to the **Embed Code (Iframe)**



3. Click the embed code to copy to your clipboard

4. Paste the coppied code to any page of your website, or share the code with your web developer.

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Acceptable Use Policy Quick Reference Guide

Last Modified on 07/23/2018 3:05 pm MST

Best Practices

Email deliverability is a partnership between the email service provider and the email senders. Help us maintain our stellar deliverability rates, so we can help you connect with your customers by following email marketing best practices and complying with Infusionsoft's AUP . Check out the rest of the Email Deliverability & Compliance articles for more resources.

Policy Violations

Part of our responsibility is to keep our system clean, which means we proactively monitor all usage. Any application found to be in violation of the AUP or which routinely fails to follow best practices may result in disabled email functionality or termination of the account.

Customer Obligations

We're doing what we can on our end to keep our systems clean, but we need your help. You must:

- Have explicit permission from each contact prior to sending email marketing
    - Any type of third party, purchased or otherwise unsolicited list is strictly prohibited. This includes renting/ borrowing lists, joint venture, and affiliate lists
    - Lists of email addresses for marketing cannot be shared/duplicated/transferred between applications
- Maintain less than the industry threshold for complaints: 0.1% or 1 complaint out of 1,000 emails per Inbox Provider
- Only use Infusionsoft in accordance with email marketing best practices
- Only send emails to active and engaged subscribers
    - Perform list hygiene maintenance at regular intervals based on your sending frequency
- Use the Infusionsoft provided opt-out link, include a physical address, and use relevant

and specific subject lines
- Process unsubscribe requests immediately
- Not do anything to obfuscate the opt-out link, like putting more than 5 line-breaks between the last line of the email and the opt-out link
- Not send content created in Infusionsoft through another service

Prohibited Industries and Content

Regardless of how well you follow email marketing best practices, certain industries or email content will still pose an inherent and unacceptable risk to our sender reputation. In order to maintain email deliverability, the following are strictly prohibited:

- Exploitation of minors
- Instructions on how to make bombs or other weaponry
- Harmful software (viruses, worms, phishing, malware, etc.)
- Illegal drugs, software, or other goods
- Online and direct pharmaceutical sales
- Gambling (e.g. casino games and sporting events)
- Debt collections; credit repair; debt relief
- Payday Loans, and other loan offerings
- Stock market
- Forex Trading (Foreign Exchange Market)
- “Get rich quick” offers; work from home; lead generation
- Multi-level marketing (MLM)
- Pyramid schemes
- Affiliate marketing; network marketing
- Dating services; escort services
- Pornography
- Sexual products; sexual healing
- Selling “likes” or “followers” for social media
- List brokers (distributing email addresses)

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Automated List Management

Last Modified on 08/27/2018 9:48 pm MST

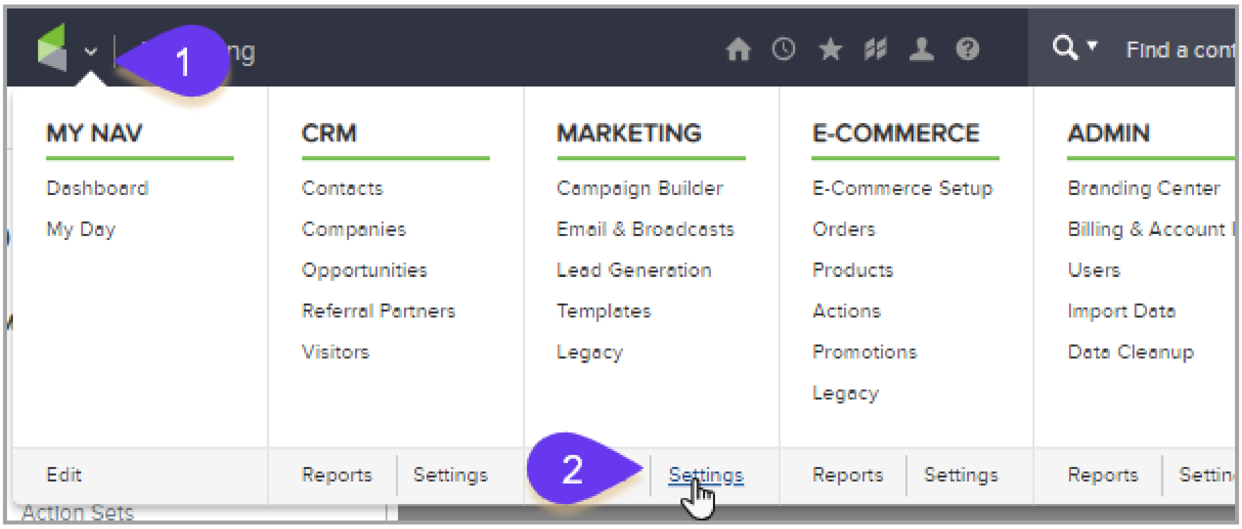
List Hygiene is a crucial part of email marketing best practices. With Automated List Management you have access to customize these two new email statuses automation.

- **Unengaged Marketable Status** - These contacts are eligible to receive your automated marketing emails, but are tracked as not having engaged for a certain number of months. The default time frame is 4 months.
- **Unengaged Non-Marketable Status** - These contacts will no longer be eligible to receive your automated marketing emails unless they engage with an email they've already received from you or submit an Infusionsoft web form.

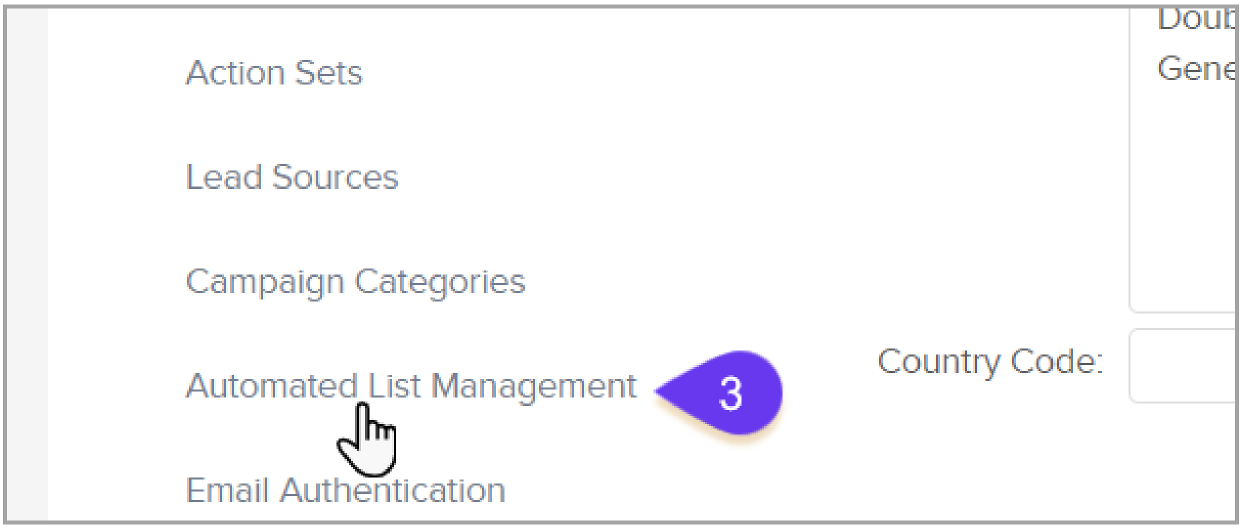
Set a "**contact engagement threshold**" **(in months)** which identifies and sets these statuses automatically.

Steps to setup Automated List Management

1. Go to **Marketing** > **Settings in the main menu**



2. Click on **Automated List Management**



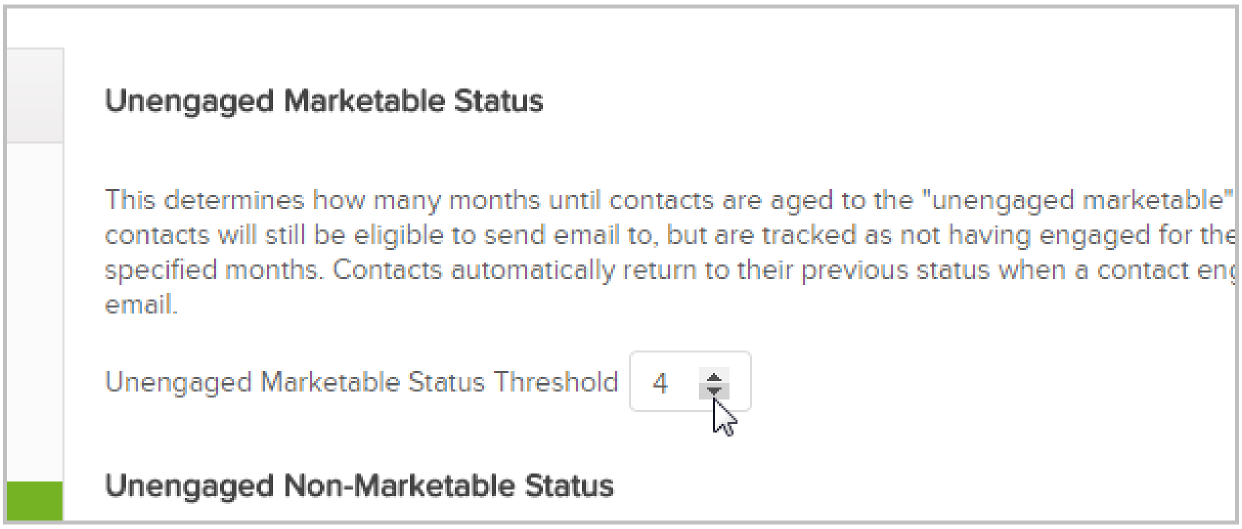
3. Click **Save Email Address Status Limits** when finished

Unengaged Marketable Status

These contacts will still be eligible to receive your automated marketing emails, but are tracked as not having engaged for the number of specified months. The default time frame for this status is 4 months - which is the hard-coded policy currently in place.

Based on this threshold, after 4 months with no engagements (opens, clicks, web form submissions), all contacts with confirmed or unconfirmed email status will automatically move to an Unengaged Marketable status.

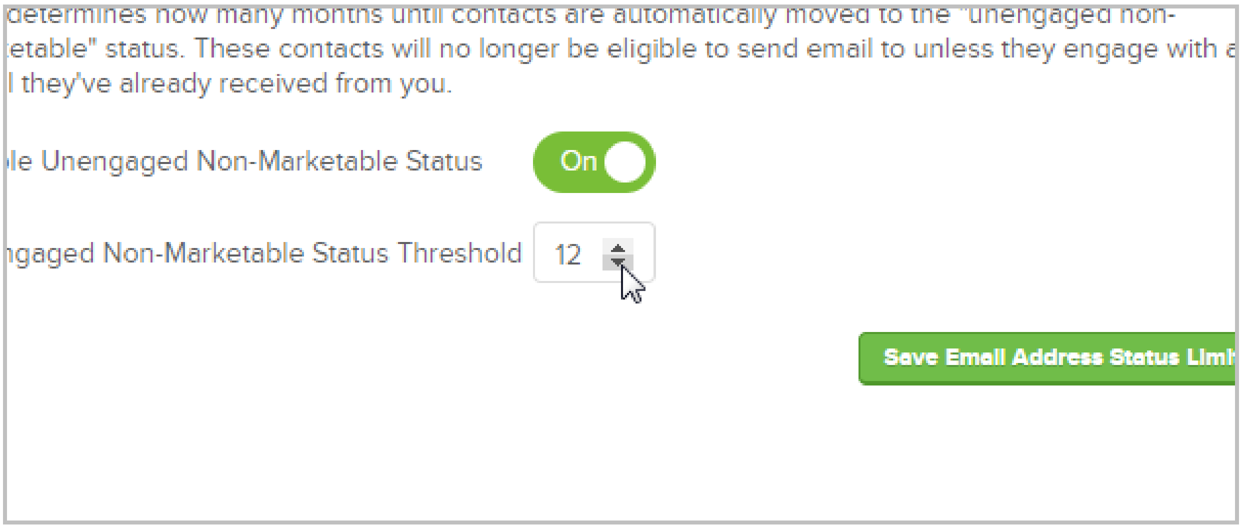
In this status, contacts are still eligible to be sent automated marketing emails, but keep in mind that no engagement after 4 months increases risks for excessive spam complaints or hard bounce s due to email accounts becoming inactive over time. Once these contact re-engage with your marketing efforts (open, click, or submit a web form) their email status will return to the previous state.



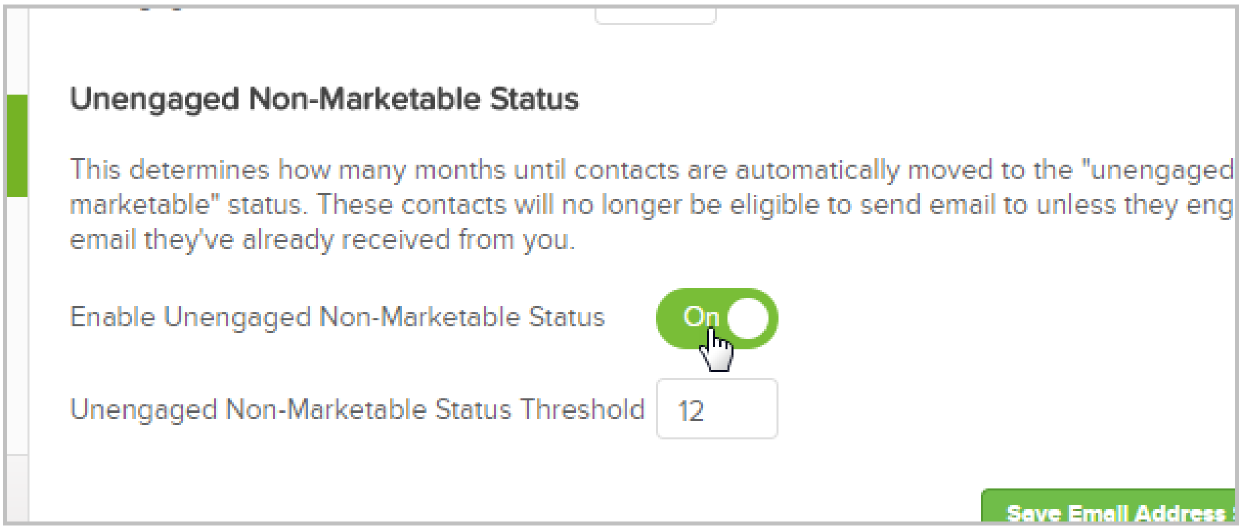
Unengaged Non-Marketable

These contacts will no longer be eligible to receive your automated marketing emails unless they re-engage (open, click, web form submission.) If they re-engage, their email status will return to its previous state.

Toggle this **On** and set your timeframe. The default timeframe recommendation is **12 months**, but you can adjust **1-24 months** depending on your preference. It must be equal to or larger than the Unengaged Marketable threshold.



You can also disable this functionality by toggling the switch to the**OFF** position.



Using a different version of Infusionsoft? Click Here to learn more

Cold Email Throttling

Last Modified on 08/24/2018 9:44 am MST

Infusionsoft's throttling mechanism automatically places a temporary hold on emails sent to cold contacts. This process is in place to protect you and Infusionsoft from high complaint rates. Your account will be subject to the consequence if the complaint rate exceeds acceptable standards and violates the Acceptable Use Policy .

How It Works

- Throttling affects broadcast emails sent to cold contacts.
- Warm contacts included in the broadcast are not subject to throttling and their email will be immediately sent.
- The mechanism will randomly select a small test portion of the cold list, and begin to send emails during a **16 hour throttling period**.
- During the throttling period, complaints must not exceed 0.1% (1 complaint per 1,000 emails per email provider. **Example:** If 2,000 of the 72,499 emails were to Gmail, and 2 or more Gmail receivers said it was spam, the broadcast would stop).
- After the throttling period, if complaints are under 0.1%, the remainder of emails will be sent and cold contacts will be considered "warm" in your application 24 hours later.
- However, if excessive complaints are received, the broadcast will stop. This gives you the opportunity to correct the issue before trying again. *Was explicit permission obtained? Do they expect to receive your email? What feedback are they leaving for you?*
- The "Try Again" button allows for one re-try, but if additional complaints are received, the broadcast will permanently stop and the "Try Again" button will be disabled.

Risk Management on Imports

The highest frequency of SPAM complaints occur after a new or existing customer imports a list and sends out a broadcast or starts a follow-up sequence. When you import a list into Infusionsoft, we provide a list of requirements so that you can evaluate your list before proceeding. If the people on your list have not given you permission to email them, you can proceed with the import, but must indicate that you do not have permission to email the list. The list will be imported as "non-marketable" which means you will not be able to send these people email until you contact them via direct mail or phone to obtain their permission.

Compliance Monitoring

We also have an internal team that is dedicated to monitoring and quickly responding to issues related to excessive SPAM complaints. This monitoring ensures that the customers who violate email best practices (by sending SPAM emails) do not jeopardize email deliverability for those who do follow best practices.

What to Do if a Broadcast Does Not Pass Throttling

1. If your broadcast has was stopped during the throttling process, it is important to examine the list and identify causes of spam complaints before attempting to send to the list again. Your recipients will mark any email as spam that is unwanted and/or unexpected. Read our list of best email marketing practices that outline the ways to gain explicit permission and set expectations, which greatly reduces the possibility of spam complaints.

2. If you've cleaned up your list and you are confident that your email is wanted and expected by each contact, you can queue up a new batch. To make sure you don't send duplicate emails to the contacts from the first broadcast attempt, tag those contacts and choose to exclude that tag in your new batch.

3. If you have confirmed your list was built, maintained and sent to using best practices, you can use the "Try Again" button in the broadcast report (**Marketing Reports->Email Broadcasts->View**.) This option will start the throttling process again, and is only available once per broadcast. Be aware that you should only use this option if you are confident that your broadcast will not generate excessive complaints, as every complaint affects your sender reputation.
   Email throttling is a reactive safety mechanism that limits damage to your reputation if you send to a high-risk list, however, you are still ultimately responsible for the complaints that your broadcast emails produce. A proactive approach to minimizing risk is still the best method for maintaining a great sender reputation and respecting the Infusionsoft Acceptable Use Policy.

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Configure Your SPF Records

Last Modified on 07/23/2018 3:07 pm MST

In an effort to protect you as a business owner and a sender of emails, your web host uses Sender Policy Framework (SPF) as a method to prevent unauthorized senders from forging your email address, or "spoofing". In short, SPF protects you by validating the sending server to confirm that the emails appearing to come from you are authorized.

Many Internet Service Providers (ISPs) require SPF records to be published under your domain name in order to accept your email.

Regardless of what service provider you use to send email, you need to ensure that your SPF record is configured to authorize that provider (in this case, Infusionsoft) to send email from your sender address.

Below is a list of the top web hosting providers, their contact numbers, and examples of their default SPF records (where we could get them) so that you can easily accomplish setting up your SPF Record.

As you read these instructions, if you have concerns about updating your SPF record. Please call your hosting provider (aka - the company you purchased your website from or the private domain that you send email from). We have provide the support numbers for the most popular hosting providers below.

How-to Steps

1. When you edit your SPF record, you will be modifying or adding a TXT record.

2. You may also be asked for a **Host**. You want to type in the "@" sign or edit the existing row with the "@" sign so that the authorization applies to your entire domain.

3. Your SPF will then look something like this
   v=sp1 a mx ptr include:mydomain.com ~all
   or
   v=sp1 a mx ptr Ip4:xxx.xxx.xxx.xxx ~all

4. If you don't have an SPF record listed, you will want to create the following TXT entry:
   TXT | @ | v=spf1 mx include:infusionmail.com ~all

5. If you do have an SPF record listed, you will want to append the entry so that it looks something like this:
   TXT | @ | v=spf1 a mx ptr include:mydomain.com include:infusionmail.com ~all
   or
   TXT | @ | v=spf1 a mx ptr Ip4:xxx.xxx.xxx.xxx include:infusionmail.com ~all

6. You may also be asked about TTL. Most of the time there is a default value here, but if not set it for 1 hour.

Example SPF records for the more popular Web Hosting Services

If you have any questions regarding your specific SPF setup on your hosting pages, please call your hosting service as they are the resident experts of their default SPF settings.

GoDaddy - Support: 1-866-463-2339

TXT | @ | v=spf1 a mx ptr include:secureserver.net include:infusionmail.com ~all

Bluehost - Support: 1-888-401-4678

TXT | @ | v=spf1 a mx ptr include:bluehost.com include:infusionmail.com ~all

HostGator - Support: 1-866-964-2867

TXT | @ | v=spf1 a mx include:websitewelcome.com include:infusionmail.com ~all

1 and 1 - Support: 1-866-991-2637

TXT | @ | v=spf1 include:1und1.com include:infusionmail.com ~all

DreamHost - Support: Chatting in for support may be most effective

TXT | @ | v=spf1 ip4:208.97.132.0/24 ip4:66.33.201.0/24 ip4:64.111.100.0/24
ip4:66.33.216.0/24
ip4:208.113.175.0/24 mx include:infusionmail.com ~a

Liquidweb - Support: 1-800-580-4985 x1 or 1-517-322-0434 (int'l)

TXT | @ | v=spf1 a mx ip4:XXX.XXX.XXX.XXX include:infusionmail.com ~all

(make sure that you replace the X's with the actual IP address in the default entry)

MediaTemple - Support: 1-877-578-4000 or documentation

TXT | @ | v=spf1 a mx ip4:XXX.XXX.XXX.XXX include:infusionmail.com -all

(make sure that you replace the X's with the actual IP address in the default entry)

Siteground - Support: 1-800-828-9231

TXT | @ | v=spf1 +a +mx +ip4:37.60.224.72 include:infusionmail.com ~all

Hostwinds - Support: 1-918-960-0191

You'll need to call in directly and ask them how to append mx include:infusionmail.com to your SPF record.

InMotion Hosting - Support: 1-888-321-4678 x2

You'll need to call in directly and ask them how to append mx include:infusionmail.com to your SPF record.

Bonus Tools

Tools to help your deliverability and maintain/monitor domain health

MXToolBox Domain Health : If you'd like to check the health of your domain, please enter your domain on this page. Your results will tell you where you need to tighten up for domain reputation and improved deliverability (other helpful mx tools can be found here)

DMARCIAN SPF Survey : This tool will look specifically at your SPF record and let you know if there are any concerns. You can use this information when you call your webhost to ensure that you are setting yourself up for success.

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DKIM

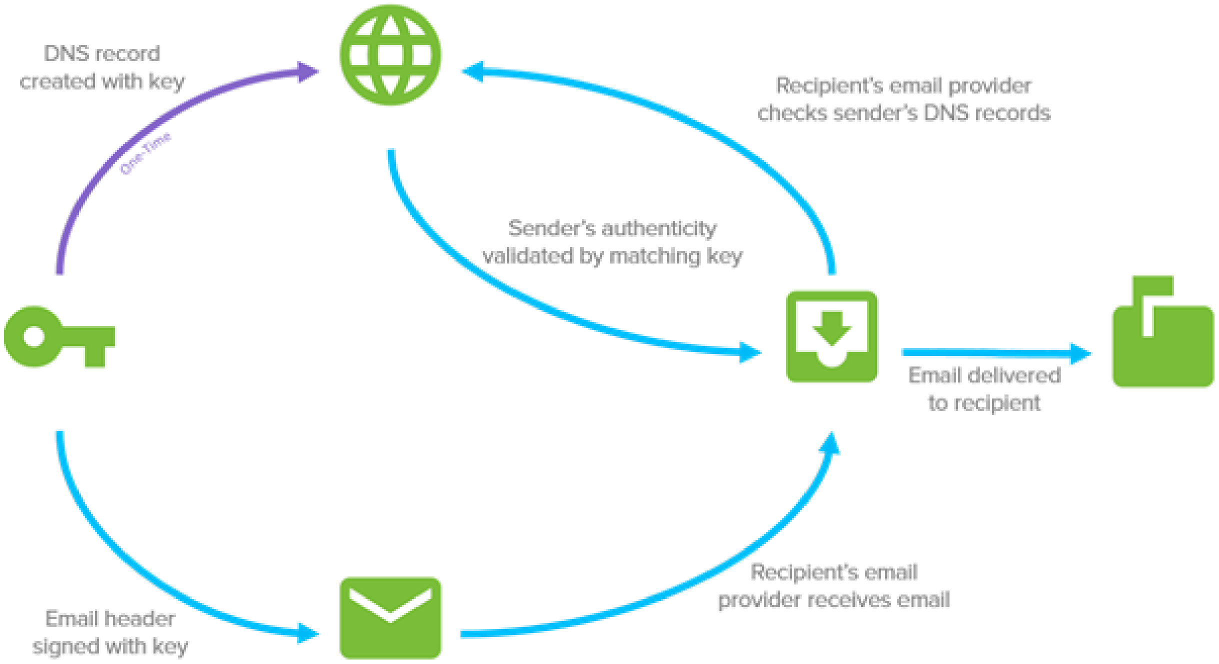
Last Modified on 08/23/2018 7:22 pm MST

What is DKIM?

DKIM (Domain Keys Identified Mail) is a complex email protocol that allows a sender's identity to be authenticated by the recipient to help combat email fraud.

How does it work?

A public key is used to create a DNS record. That same key is also used to digitally sign the header of emails that are sent. When the recipient's provider receives the email, they check the sender's DNS records and the sender's authenticity is validated by the matching key. The message can then be delivered to the recipient with confidence that the sender is who they claim to be.



Why is it important?

DKIM affords the greatest assurance that the sender is who they say they are and gives email providers a way to track and hold senders accountable for the messages they're sending. As a result, deliverability of these messages is greater and inbox placement is improved.

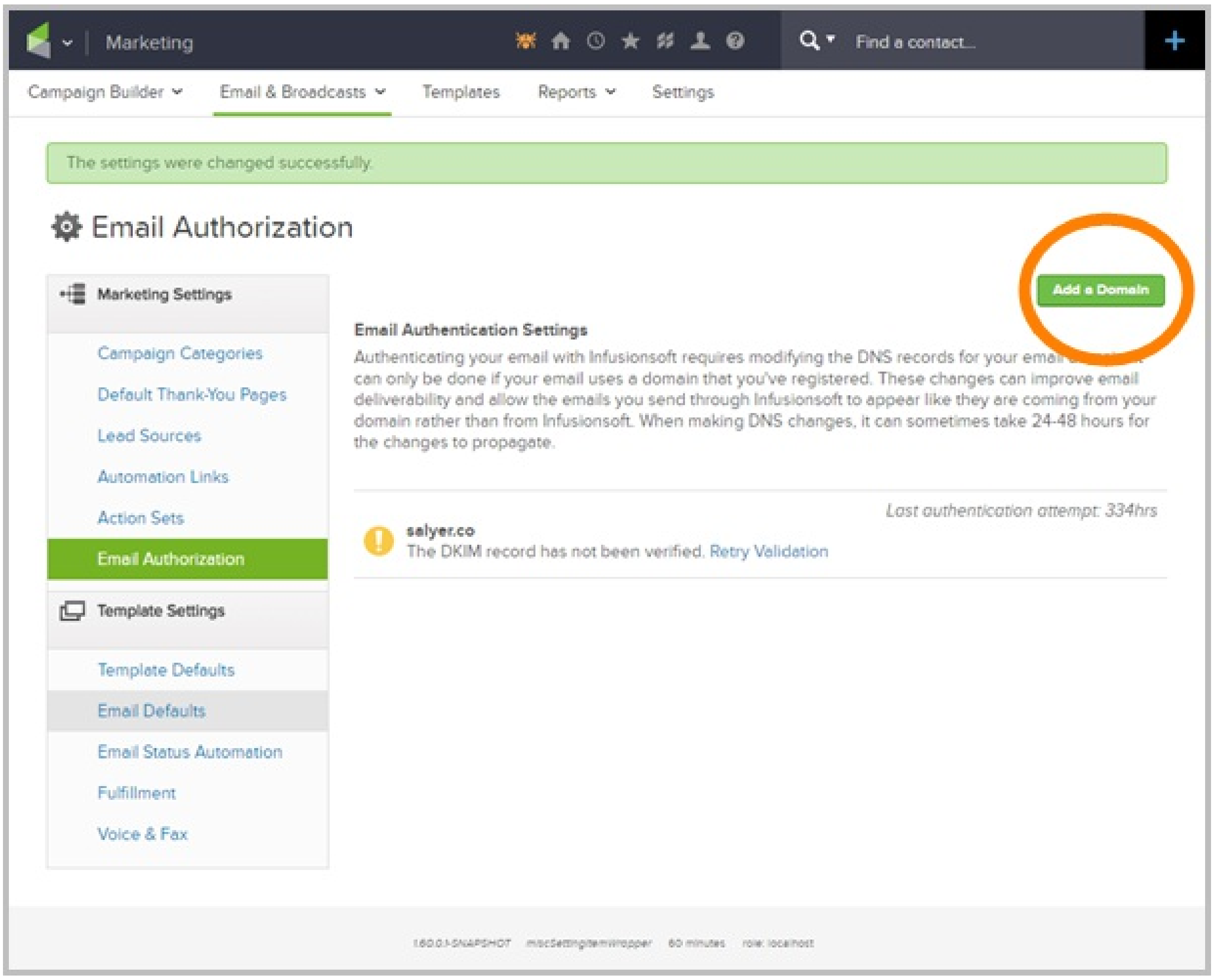
What's special about Infusionsoft's implementation of DKIM?

Normally, implementing DKIM requires a domain owner to create public and private RSA keys which are used in the authentication process. To make it easier for you to implement DKIM, Infusionsoft has eliminated this complexity by creating these keys on your behalf. With this approach, you only need to create a CNAME record in your DNS that points back to the Infusionsoft servers, and turn on the function in your Infusionsoft account. We've tried to further simplify this process by providing simple, step-by-step instructions directly within your Infusionsoft account to help guide you.

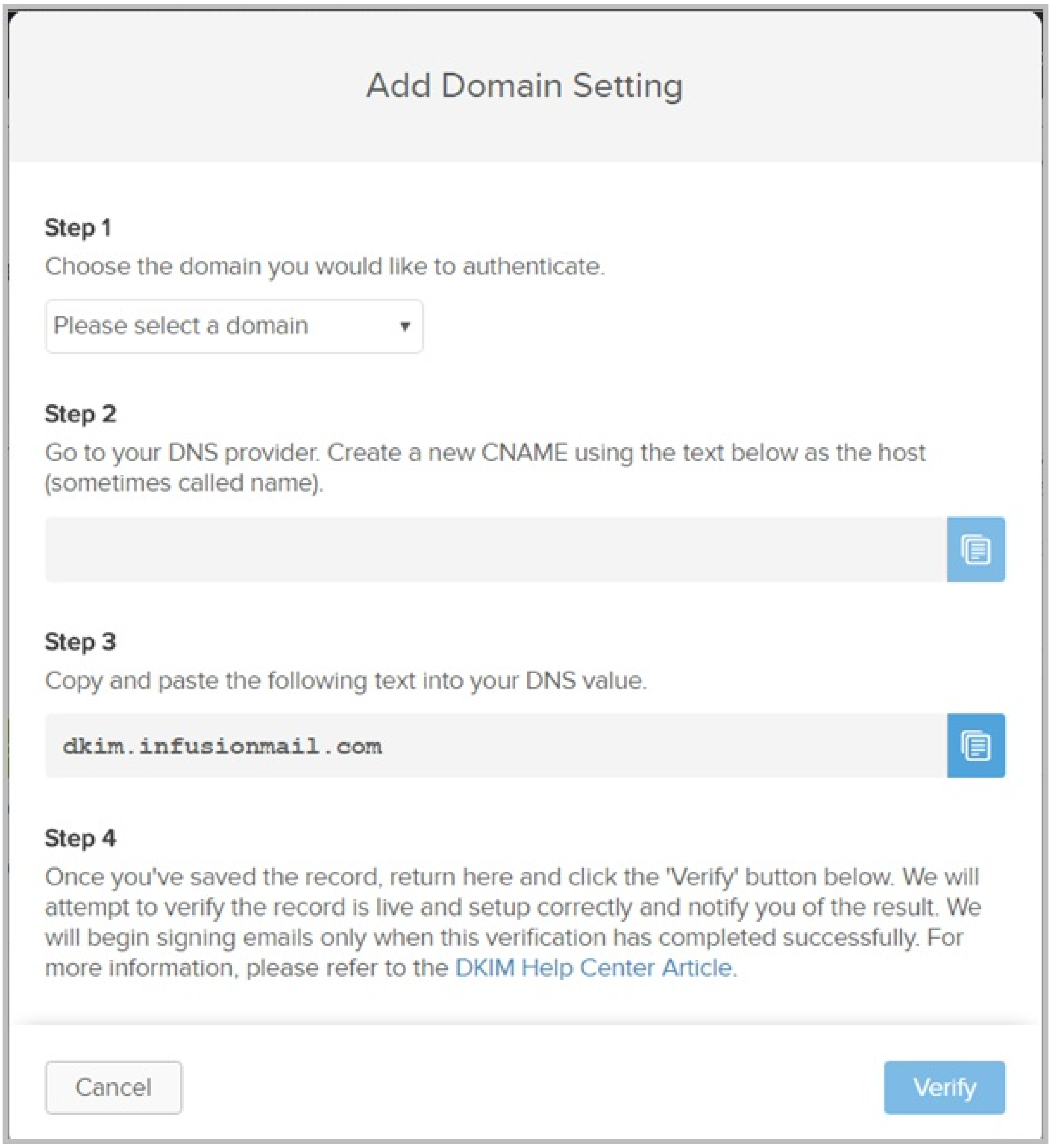
How do I set it up?

1. Go to **Marketing** > **Settings** > **Email Authorization**

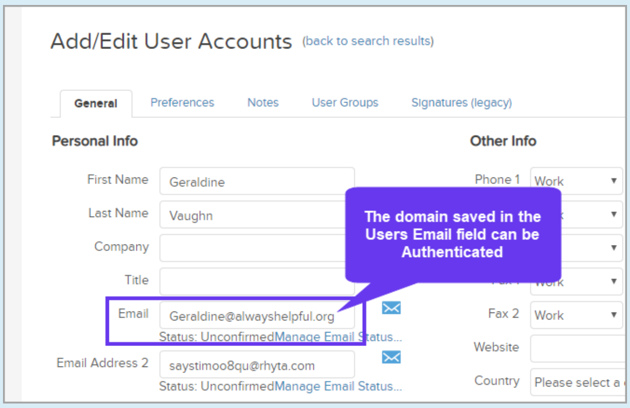
2. Click the **Add a Domain** button



3. In the window that appears, select the domain for which you would like to create a DKIM key from the drop-down. This will populate the field in step two.

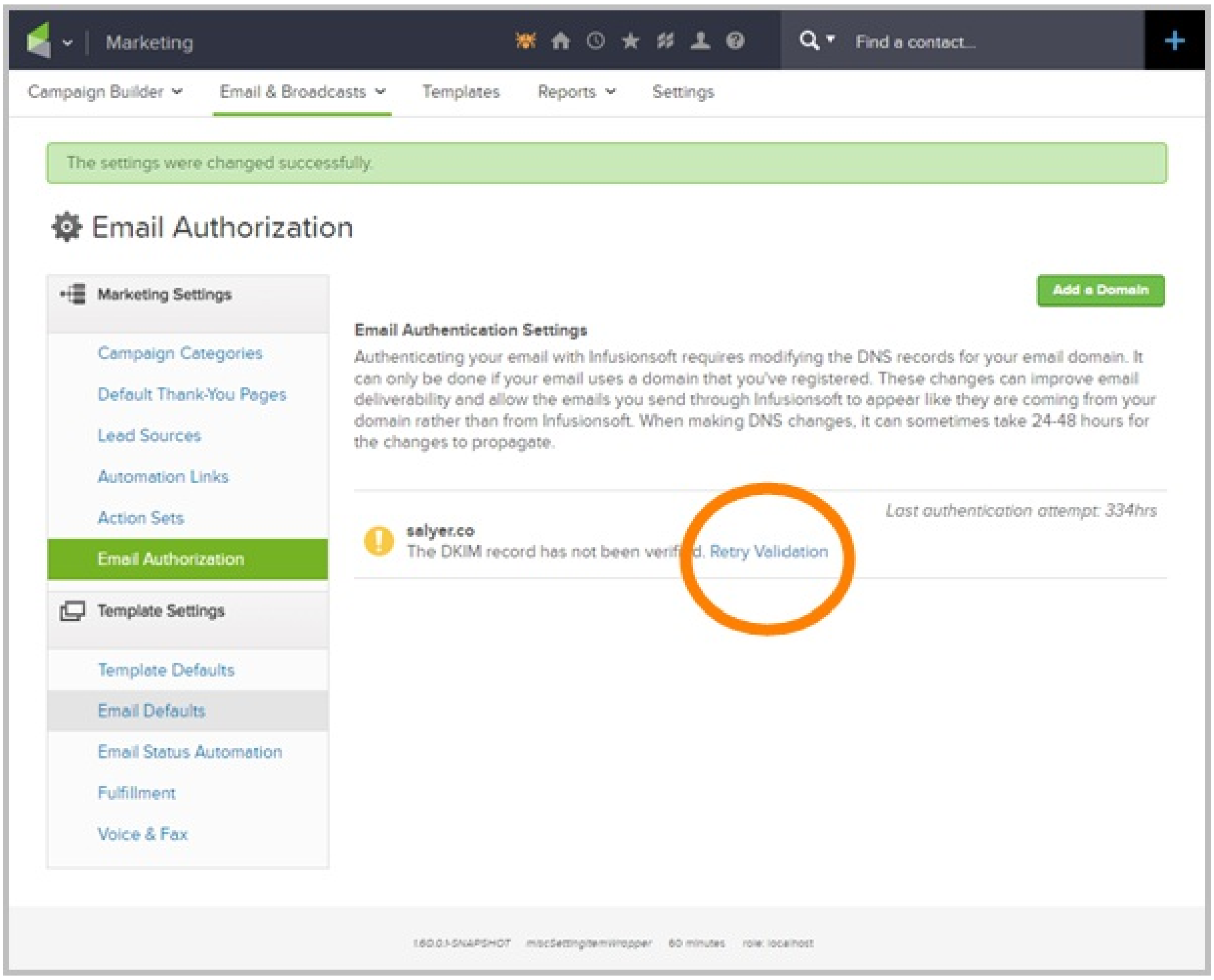


Pro Tip! You can add additional email domains by adding that email domain to a User Record under Admin > Settings > Users in the "Email" field.



4. Now, follow steps that appear on-screen. These instructions require you to create a CNAME entry in your DNS records. If you need assistance with this step, we recommend you contact your DNS provider for assistance because the steps may vary depending on your provider. Below are links to help articles of several common DNS providers to help you. For most of the providers listed below, remove your domain name from the URL in step 2 and use that value for the Host. For example, if the URL is "*d5e8e10f-67fd-4e29-87dd-58f7b3760b10._domainkey.yourdomain.com*", use only "*d5e8e10f-67fd-4e29-87dd-58f7b3760b10._domainkey*" for the Host value.
    1. GoDaddy
    2. BlueHost
    3. Host Gator
    4. DreamHost
    5. Liquid Web
    6. In-Motion
    7. **Important Note!** Some DNS providers are not compatible with this method of DKIM

5. In the last step, you'll click the **Verify** button at the bottom of the window to continue. Infusionsoft will attempt to validate the CNAME record you created in your DNS. The record must be live in order for your Infusionsoft account to successfully validate it. If the record cannot be verified, wait until the Time-To-Live (TTL) settting of your DNS provider has passed, and try to validate again by clicking the **Retry Validation** link.



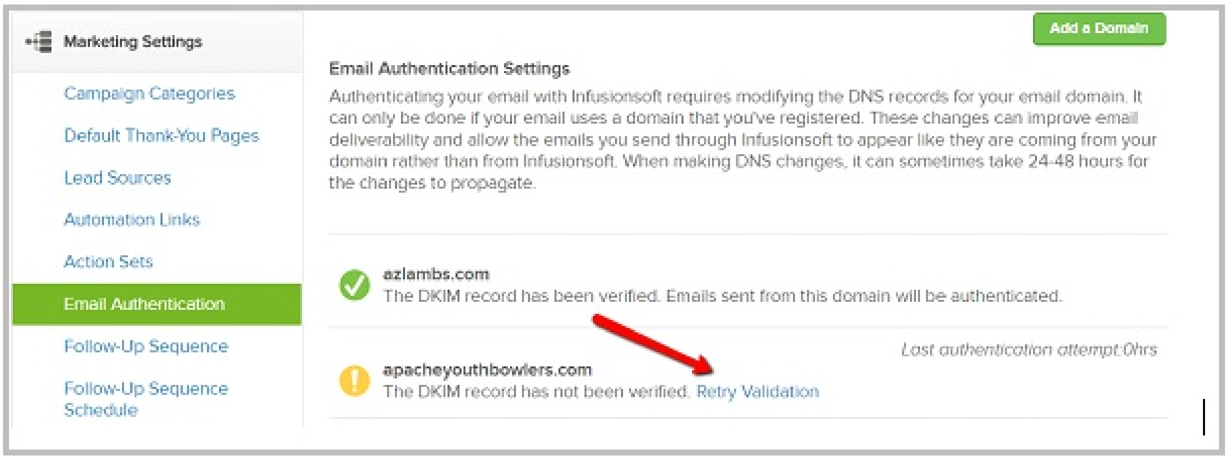
6. Once the domain has been verified, Infusionsoft will begin using DKIM when sending emails on your behalf.

DKIM Re-validation Steps

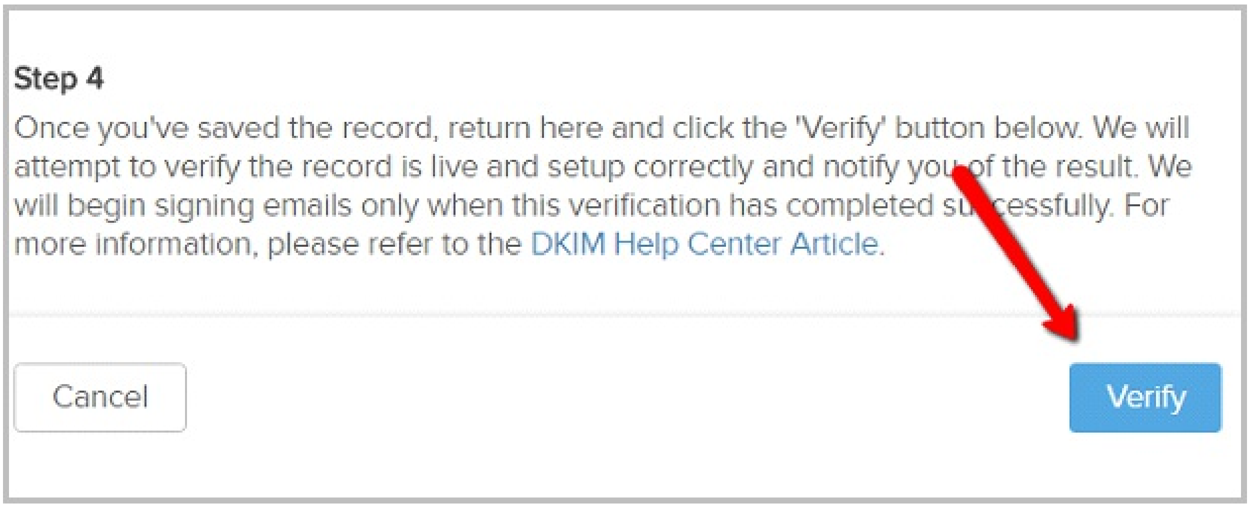
Recently we deployed updates to how we assign DKIM to outgoing emails. If you setup DKIM prior to 1/17/17, you may need to follow these steps to ensure DKIM is signed properly for mail from your Infusionsoft application. The changes require you to update your CNAME record that you added to your domain and then to re-validate your domain. There are 2 steps to complete:

1. Update Your CNAME record - These instructions require you to edit a CNAME entry in your DNS records. If you need assistance with this step, we recommend you contact your DNS provider because the steps may vary depending on your provider.
    1. Locate the CNAME entry in your DNS records where you previously entered *infusionmail.com* and replace it with *dkim.infusionmail.com*, then save the record.
    2. If you have multiple domains that were previously verified, you will need to do this for each CNAME record on each domain.

2. Re-Validate Your DKIM record
    1. Login to your Infusionsoft application, navigate to the Marketing module and click on **Settings**.
    2. On this page, look at the navigation bar on the left and click on **Email Authentication**.
    3. Now you should see your domain(s). Click on the hyperlink **Retry Validation.**



    4. This will open up a Retry Domain Verification pop-up window. Click on the **Verify Button** to complete the update. If this fails to validate, please wait and try again (it can take hours, depending on your DNS provider). If you have multiple domains that were previously verified, you will need to repeat these steps for each Domain.

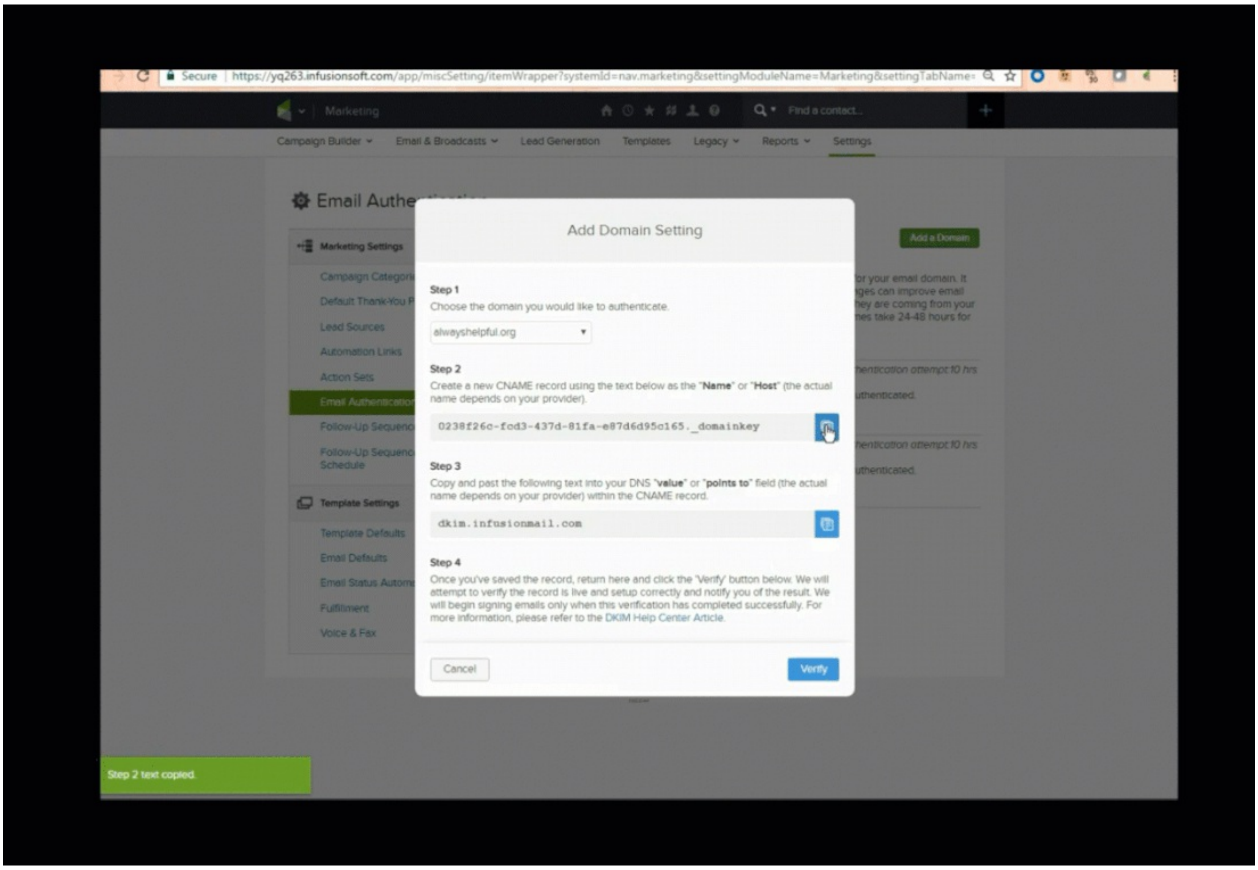


DKIM and SPF Setup Example

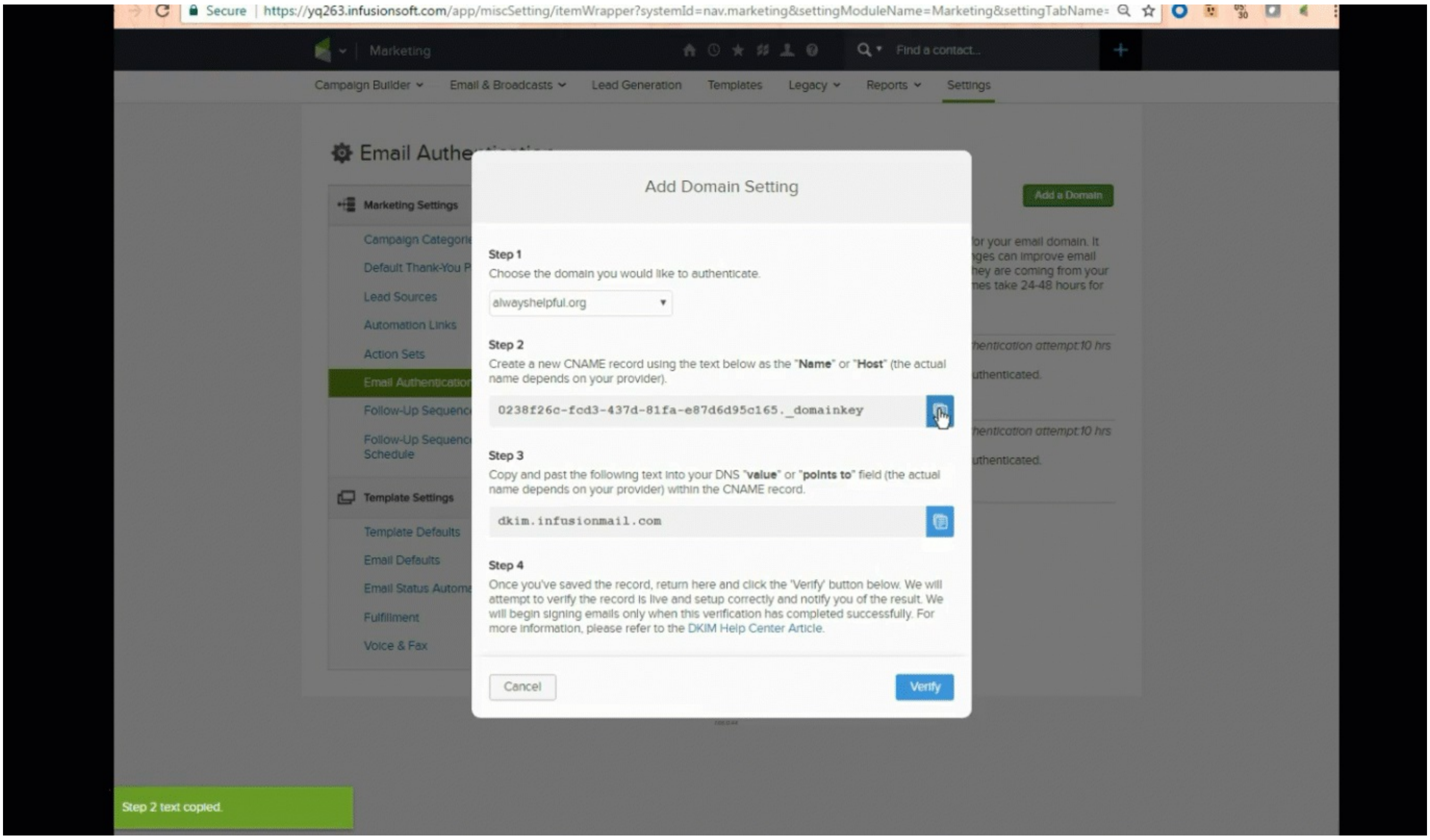
Last Modified on 07/23/2018 3:08 pm MST

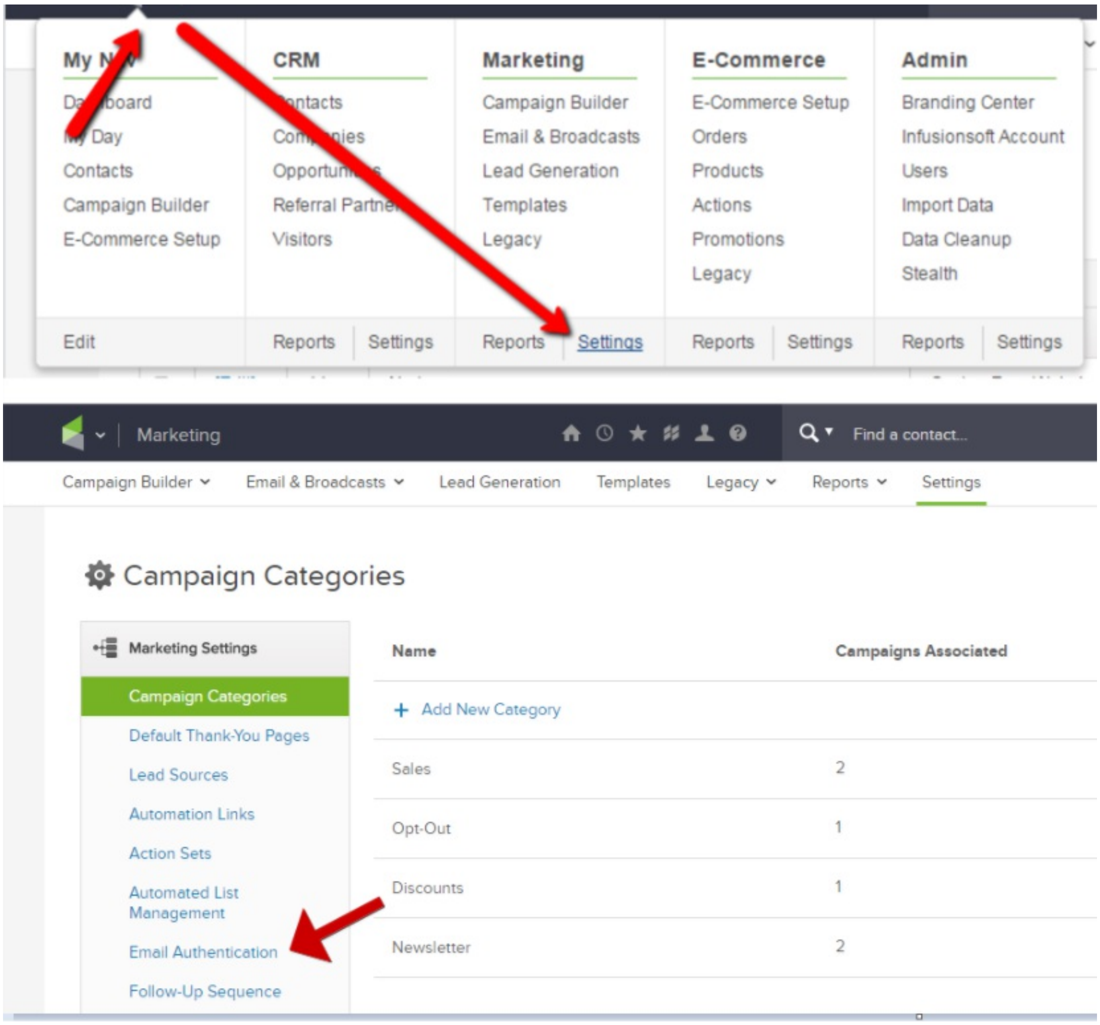
An SPF record is a type of Domain Name Service (DNS) record that identifies which mail servers are permitted to send email on behalf of your domain. The purpose of an SPF record is to prevent spammers from sending messages with forged From addresses at your domain.

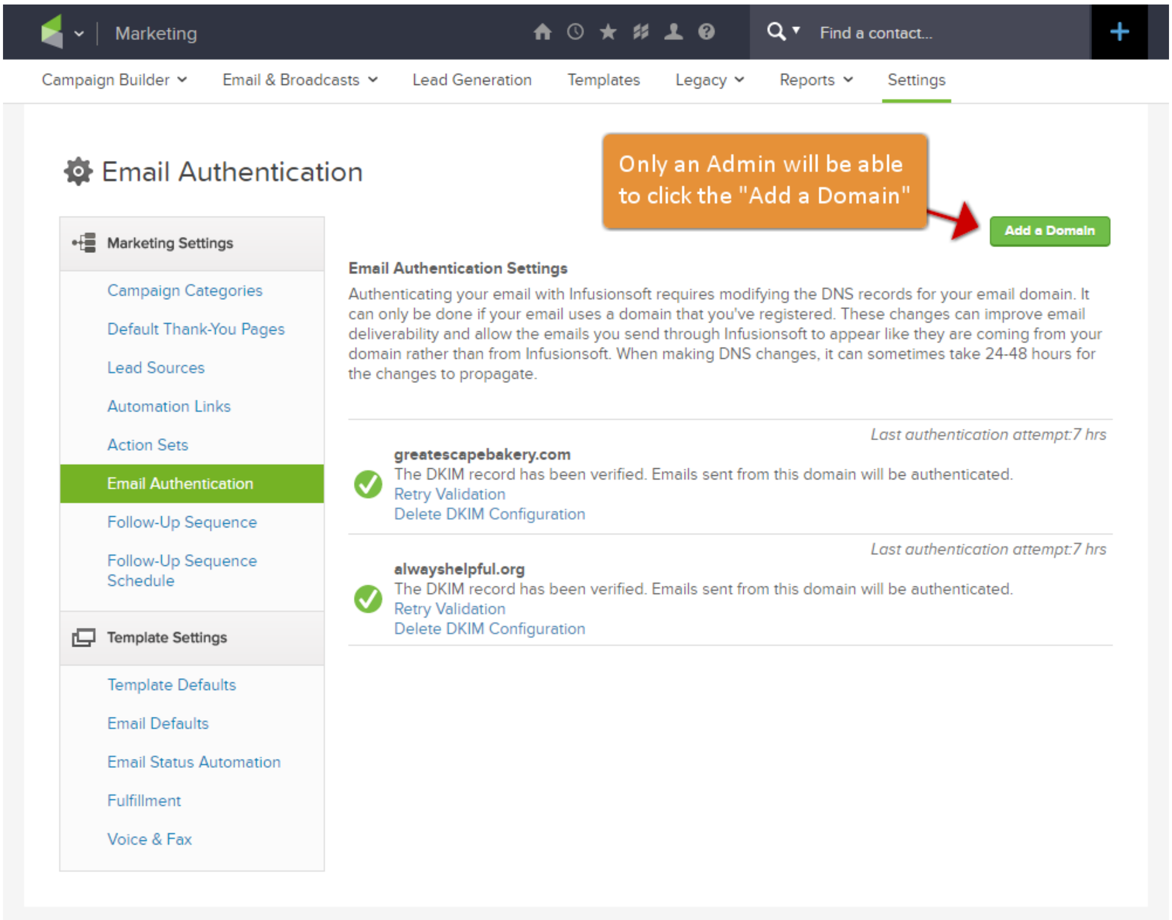
Example of SPF record set up through GoDaddy using Gmail
v=spf1 include:_spf.google.com include:infusionsoft.com ~all



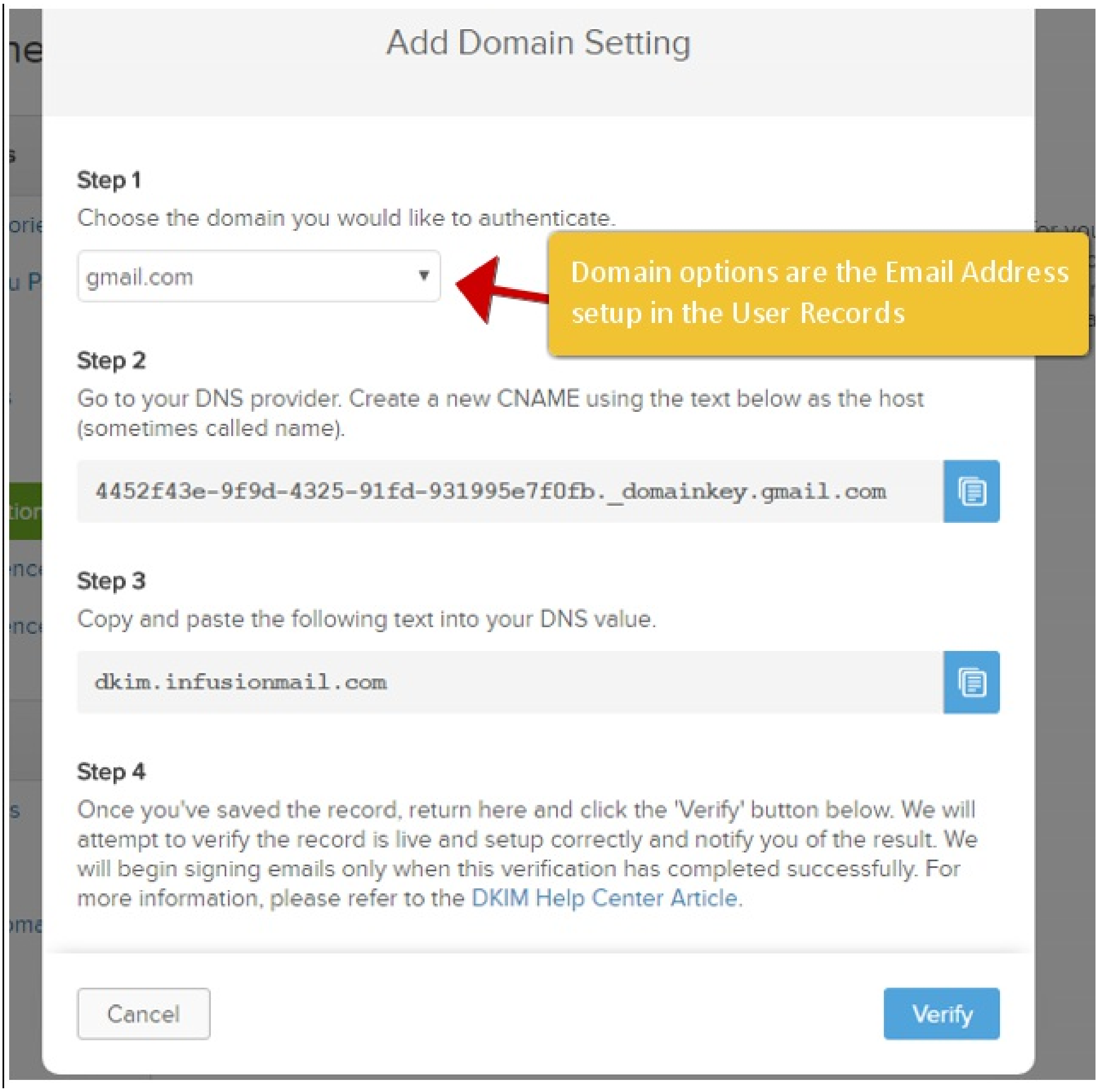
DKIM (Domain Keys Identified Mail) is a complex email protocol that allows a sender's identity to be authenticated by the recipient to help combat email fraud.


Add Domain Setting
Step 1
Choose the domain you would like to authenticate.
alwayshelpful.org
Step 2
Create a new CNAME record using the text below as the "Name" or "Host" (the actual name depends on your provider).
0238f26c-fcd3-437d-81fa-e87d6d95c165._domainkey
Step 3
Copy and past the following text into your DNS "value" or "points to" field (the actual name depends on your provider) within the CNAME record.
dkim.infusionmail.com
Step 4
Once you've saved the record, return here and click the 'Verify' button below. We will attempt to verify the record is live and setup correctly and notify you of the result. We will begin signing emails only when this verification has completed successfully. For more information, please refer to the DKIM Help Center Article.
Cancel
Verify
Step 2 text copied.


CRM
Marketing
E-Commerce
Admin
Contacts
Campaign Builder
E-Commerce Setup
Email & Broadcasts
Lead Generation
Templates
Legacy
Orders
Products
Actions
Promotions
Branding Center
Infusionsoft Account
Users
Import Data
Data Cleanup
Stealth
Visitors
Edit
Reports
Settings
Marketing
Find a contact...
Campaign Categories
Marketing Settings
Default Thank-You Pages
Lead Sources
Automation Links
Action Sets
Automated List Management
Email Authentication
Follow-Up Sequence
Name
Campaigns Associated
Add New Category
Sales
Opt-Out
Discounts
Newsletter



You can add additional email domains by adding that email domain to a User Record.


Add Domain Setting
Step 1
Choose the domain you would like to authenticate.
gmail.com
Domain options are the Email Address setup in the User Records
Step 2
Go to your DNS provider. Create a new CNAME using the text below as the host (sometimes called name).
4452f43e-9f9d-4325-91fd-931995e7f0fb._domainkey.gmail.com
Step 3
Copy and paste the following text into your DNS value.
dkim.infusionmail.com
Step 4
Once you've saved the record, return here and click the 'Verify' button below. We will attempt to verify the record is live and setup correctly and notify you of the result. We will begin signing emails only when this verification has completed successfully. For more information, please refer to the DKIM Help Center Article.
Cancel
Verify

DMARC May Impact Your Deliverability

Last Modified on 09/05/2018 2:17 pm MST

Changes at Gmail, Yahoo and others may impact your deliverability - are you prepared for DMARC?

In an effort to reduce spam and spoofing, email providers are moving to a policy that will reject mail sent from outside of their respective servers. This means that if you use a ‘from’ email address from one of these providers, your email will be rejected because it is sent from Infusionsoft and not the actual provider. While this will help to reduce spoofing and phishing via email, it may also impact your legitimate marketing efforts.

We want to help you understand how you can be best prepared for these upcoming industry changes. Here are answers to some of the most common questions:

Q: **What happens if I do not update to a DMARC compliant "from" address?**
A: In order to deliver your emails, Infusionsoft will automatically update your "from" address

to one ending with *@infusionmail.com*.

Examples:
bob@gmail.com > *bob+gmail@infusionmail.com*
123company@yahoo.com > *123company+yahoo@infusionmail.com*

Note, this solution is meant to be temporary as we strongly advise all small businesses use a private domain email as soon as possible (*name@mycompany.com*).

Q: **What does DMARC stand for?**
A: Domain-based Message Authentication Reporting & Conformance. Learn more at dmarc.org

Q: **Which email providers are embracing DMARC policies?**
A: Yahoo, AOL, Google, and Microsoft are among the email providers who will use these policies. This means that any email that ends in @yahoo, @aol, @gmail, @outlook, @hotmail, @msn, or @live will no longer be delivered if it is in your Infusionsoft 'From' address.

Q: **Is this just an Infusionsoft problem?**
A: No, this is across the industry. If you do your email marketing with any email marketing provider and send your emails from one of the impacted domains, your email will not be delivered.

Q: **My Infusionsoft 'from' email is one of these, what should I do?**
A: We advise any small business owner to have a private domain email (ie - myname@mycompany.com , info@mycompany.com , etc.) If you have a website, you may have access to a private domain through your hosting package. If you aren't sure, please call your website host and ask for help getting a branded domain email.

Q: **How do I get my private domain email into Infusionsoft?**
A: Please follow the instructions below:

1. Go to **Admin** > **Users**

2. Select the User you want to modify
3. Change email address, modify permission, and **Save.**

- You'll want to change **All** users that have an email from an @gmail, @hotmail, @msn, @live, @yahoo, or @aol email address.
- If you have campaigns that use an 'Other' or a Non-merge field with an email address that has one of the above domains, you will want to modify these addresses too so that they will be delivered.

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Email Address Whitelisting

Last Modified on 07/23/2018 3:08 pm MST

"Email Whitelisting" is used to describe the act of allowing an email to reach your inbox. This is helpful if you want to make sure a certain business' email doesn't go to your spam folder. Whitelisting is typically accomplished by adding the sender to your contact list in your email client. In this article, I'll give you step-by-step instructions that show how to whitelist a sender.

Below you'll find step-by-step instructions to whitelist a sender in common email clients and providers.

Apple iPhone / iPad

1. Open the email.
2. Tap the sender's name in the From line.
3. On the next screen, tap Create New Contact.
4. Tap Done.

Microsoft Outlook 2013

1. Right-click on the email that you would like to add to your safe sender list
2. Hover over Junk and then click the option Never Block Sender.

Android

1. Tap to open the email.
2. Tap the icon next to the email address.
3. Tap OK.

Apple Mail

1. Right-click on the sender's email address.
2. Select Add to Contacts or Add to VIPs.

Gmail

1. Click and drag the email into the Primary tab.
2. Click Yes to confirm

Outlook.com (formerly Hotmail)

1. Open the email.
2. Click the Add to contacts link

Yahoo! Mail

1. Right-click the email.
2. Select Add Sender to Contacts.
3. Click Save.

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Email Bounces Explained

Last Modified on 07/23/2018 3:13 pm MST

Most emails bounce because of a permanent issue with the receiving email account, a temporary issue with the receiving email account, or because the email is blocked by the receiving server. When an email bounces, the recipient's server sends a message back to Infusionsoft that describes the reason for the bounce. You can view the reasons through the Email Status Report (Marketing > Reports > Email Status Report) and can set up actions that trigger for each type of bounce through Marketing > Settings > Template Settings and click on the Email Status Automation tab. You can use these actions to segment people based on bounce issues and/or follow up with individuals to request a new email address or resolve the problem that is preventing email delivery.

General Bounce

A general bounce is recorded when the server could not deliver an email message, but also could not detect a specific reason. In most cases, this is related to a soft bounce.

Hard Bounce

A hard bounce is recorded when an email message is considered permanently undeliverable. The email system will not try to deliver the email again. Hard bounce email addresses are automatically disabled. The system will not allow you to send any automated email to these accounts. You can contact the person directly to request a valid email address. In most cases, a hard bounce indicates the email address does not exist, however, it may also indicate that your emails are being rejected due to the SPF configuration on your DNS account. You may need to configure the SPF records to allow Infusionsoft servers to send email from you.

Soft Bounces

A soft bounce is recorded when there is a temporary issue with the recipient's email account, delaying message delivery. In many cases, the email system will try to redeliver the message several times over a period of hours or days and will only consider it undeliverable after the retry process times out. There are several types of soft bounces.

- Mailbox Full: The recipient's email box is too full. There is no room for the message. Most of the time this is related to improper maintenance, but it could mean that the recipient no longer actively uses the email account even though it still exists.
- Message too Large: There is content in the message or attachments causing the message size to exceed the limits of the receiving server.
- DNS Failure: The email cannot be delivered due to an issue with the receiving server. This is most likely an issue with the nameserver settings for your domain. Contact your domain administrator for assistance. The issue may be related to the SPF records.
- General: The specific reason for the bounce has not been detected.
- Auto Reply: This kind of soft bounce indicates the message has been delivered, but the recipient has an auto-reply enabled on their account. The bounce status will be removed as soon as the recipient opens the email.
- Subscribe Request: These are recorded when an auto-reply is sent to your bounce capture email account (mailer@infusionsoft.com or bounce@infusionsoft.com) asking to be added to your list. They are a type of soft bounce since most people would not send a message to these accounts.

Mail Blocks

A mail block is recorded when the recipient's email server blocks an email message completely. It rejects it before it tries to deliver it to their inbox.

- General: The recipient's email server is blocking messages sent through the Infusionsoft server.
- Known Spammer: The recipient's email server is blocking messages from your email account based on an email history or reputation that indicates you've been sending SPAM.
- Relay Denied: The recipient's email server is blocking messages sent through the Infusionsoft server. Setting up your SPF to include infusionmail.com will help you resolve this issue.
- Spam Detected: The recipient's email server is blocking your email because the content looks like SPAM. Use the Infusionsoft Spam Score tool in the email template to check the email content and reduce the SPAM score below 5 (preferably zero.)
- Attachment Detected: The recipient's email server is blocking the message because of the attachment. It may have identified the attachment as a possible virus source, the system may not allow attachments at all, or may block specific types of files (e.g. .exe). The size of the attachment may also be causing an issue. Make sure your attachment size is less than 10 MB.

Unsubscribe Request

These are recorded when an auto-reply request is sent to your bounce capture email account(mailer@infusionsoft.com or bounce@infusionsoft.com) asking to be removed from your email list. A real person will reply to the email or click on the Unsubscribe Link. These Unsubscribe Requests are the same as an ISP Spam complaint.

Undetermined

An undetermined status is assigned when Infusionsoft is not able to identify the cause of the bounce based on the feedback received from the receiving server.

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Email Compliance Remediation Process

Last Modified on 07/23/2018 3:09 pm MST

Why have I been contacted regarding email compliance?

Some of your email marketing practices are not aligned with the industry standard best practices. This results in excessive spam complaints, hard bounces, or other symptoms, and can negatively affect email deliverability due to decreases in sender reputation. It may also put your Infusionsoft account at risk for violating the Terms of Use. As an Infusionsoft customer, you a have a number of obligations including, but not limited to, the following that specifically pertain to email use:

- All recipients must explicitly agree to receive email marketing from your specific business entity.
- Spam/Feedback complaint rates must not exceed .1% (1/1000) per email service provider.
- Opt-out links must not be padded or obscured.
- Subject lines must not mislead the recipient as to the contents of the email.
- Your business and/or email content must not pertain to any of the categories listed in Infusionsoft's Acceptable Use Policy , Section 4.a. Questionable Practices ("Inappropriate Use")

What will happen if no changes are made to my current marketing practices?

Once the below actions have been taken there should be a vast drop in the symptoms that negatively affect sender reputation. If the symptoms do not drop, any one of the following will occur:

- You may be contacted directly to take further action.
- Temporary loss of email functionality in the application.

How do I get back in compliance?

Review all of your current marketing practices to ensure that you are using all of the best practices. These topics along with other best practices are covered in our Email Marketing Best Practices Handbook . (Link to Handbook) Of these best practices, these 2 are the most important to focus on:

1. Explicit Permission: Verify that you are only sending bulk marketing to contacts that have provided explicit permission – opt out any contacts that have not given you permission. Update your lead generation practices to ensure you are obtaining explicit permission to market to your contacts. For more specific help with this, use the information outlined in our Explicit Permission guide.

2. List Hygiene: It is important that you only market to those contacts that want your emails and are actively engaged. To assist in reviewing your contacts you will need to perform List Hygiene Maintenance. Use the steps outlined in our List Hygiene guide.

3. It is important to perform List Hygiene Maintenance on a monthly basis to prevent any further issues.

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Explicit Permission

Last Modified on 07/23/2018 3:10 pm MST

Gaining explicit permission for email marketing is not only a best practice, but it's also required by Infusionsoft , and most email service providers in the industry. Email marketing without permission will negatively impact your sender reputation, and ultimately lead to a decrease in deliverability and loss of good leads.

What is Explicit Permission?

Explicit permission is obtained when a contact voluntarily requests to receive email communication from your business, and is aware what content they will receive and how often they will receive it.

How do I obtain explicit permission for my bulk marketing?

- On web forms, use a check box defaulted to unchecked to allow contacts to choose to agree to marketing.
- Through personal interaction like at an event, over the phone, or direct contacts via social media, be sure to ask explicitly if you can send ongoing marketing emails to the address they shared with you.

What is NOT considered explicit permission?

- Having the contact sign up for a one-time email, but then adding them to additional marketing.
- Purchasing a list of email addresses from a 3rd party that sells “targeted” lists.
- Borrowed or shared lists from companies in your industry.
- If you force or coerce contacts into sharing their email address for them to receive a discount, special access or even to create an account. Permission is only explicit when it is voluntary.

What do I do with contacts that have not given permission?

- Opt out any contacts that have not given you permission.
- Permission can be obtained by phone or personal interaction. Do not send bulk email to

these contacts.

Here is an example of how to collect explicit permission:


Infusionsoft

First Name *

Email *

Yes I would like to receive weekly emails with information on the upcoming software updates.

Submit

Additionally, make sure you are following all the best practices that are found in our Email Marketing Best Practices Handbook .

Using a different version of Infusionsoft? Click Here to learn more

How Your From Address Affects Email Deliverability

Last Modified on 09/05/2018 12:29 pm MST

DMARC, Domain-based Message Authentication Reporting & Conformance, is an email authentication protocol that allows domain owners to publish a policy statement telling receiving domains what to do if their message fails SPF or DKIM authentication. In an effort to reduce spam and spoofing, email providers have moved to a policy that will reject (p=reject) mail sent from outside of their respective servers. This means that if you use a 'from' email address of one of these providers, email will be rejected because it was sent from Infusionsoft and not the actual provider. In 2014 Yahoo! and AOL published strict DMARC policies, with Gmail slated to follow suit in June of 2016. In fact, this policy will likely become the new standard across all free email providers over time.

To mitigate deliverability issues, we encourage the use of your own private domain. Registering your own domain for your business is important for branding and marketing, along with many other benefits including email deliverability. Please note this is not specific to Infusionsoft, these changes impact anyone using a third-party email service provider or service that sends email on your behalf.

Does this affect me?

This affects Infusionsoft customers who are sending emails through Infusionsoft using a Yahoo, AOL! or Gmail email address in the “From” field of their emails (i.e. james123@yahoo.com).

How does this affect me?

If you send emails from Infusionsoft using a Yahoo, AOL! or Gmail domain, your emails will get rejected (bounced) by most major email providers including Gmail, Yahoo and Hotmail.

How can I fix this?

Best practice is to send emails from Infusionsoft using a custom business domain (i.e.tom@tomscleaning.com). We recommend that customers obtain a custom business domain, setup an email address and update the “From” fields for any email sent from their Infusionsoft account.

This will resolve this problem completely and ensure that all of the emails you send get delivered.

Here is how you can create a custom business domain for Gmail .

After I've Fixed This, How Do I Further Maximize My Deliverability?

To maximize your email deliverability through Infusionsoft, we recommend configuring the SPF records on your domain to indicate our servers are authorized to send email from your sender address. This will further reduce the chance that your emails might end up flagged as spam. You can find instructions on that here: Configure Your SPF Records .

Using a different version of Infusionsoft? Click Here to learn more

How to Locate And Remove Opt Outs from Email List

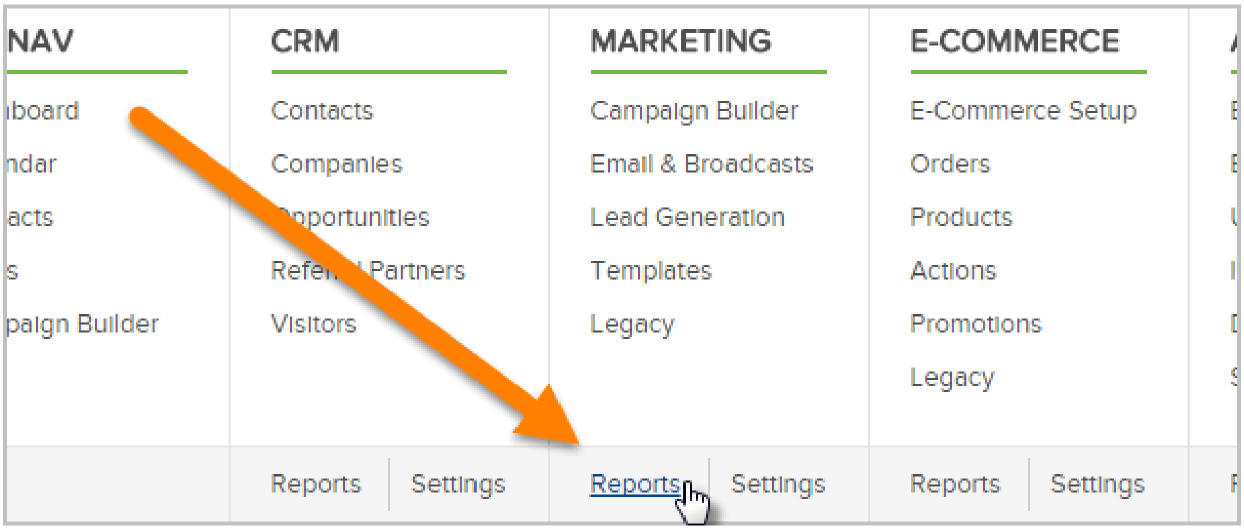
Last Modified on 07/23/2018 3:11 pm MST

Removing opt-outs helps to:

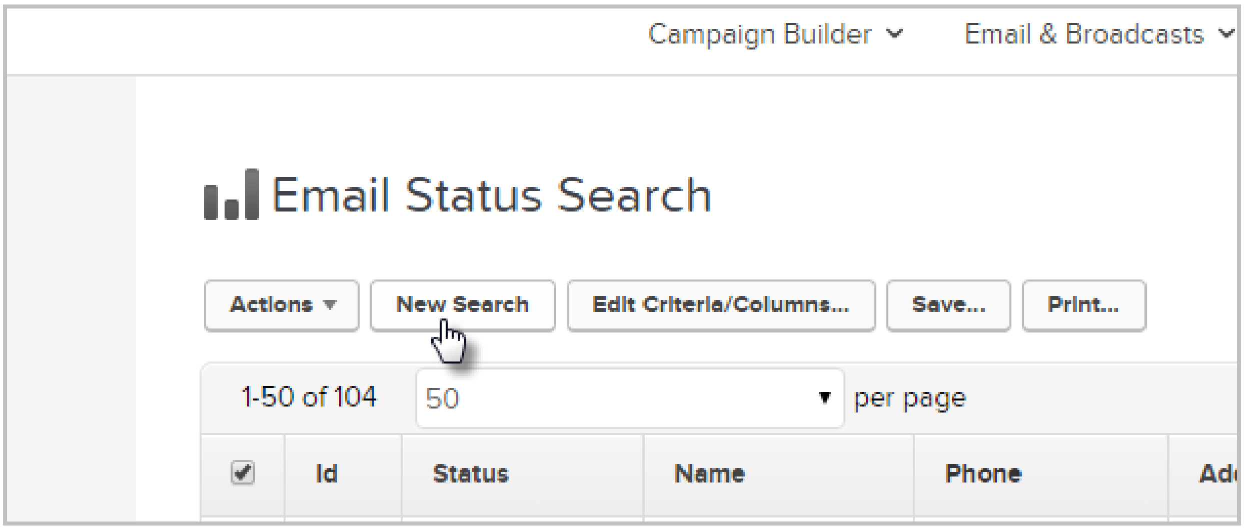
- Maintain a current and active list
- Open up free space in your contact list
- Remove dead leads from your broadcast and campaign stats

Finding the Report

Go to **Marketing>Reports** and click on **Email Status Search**.

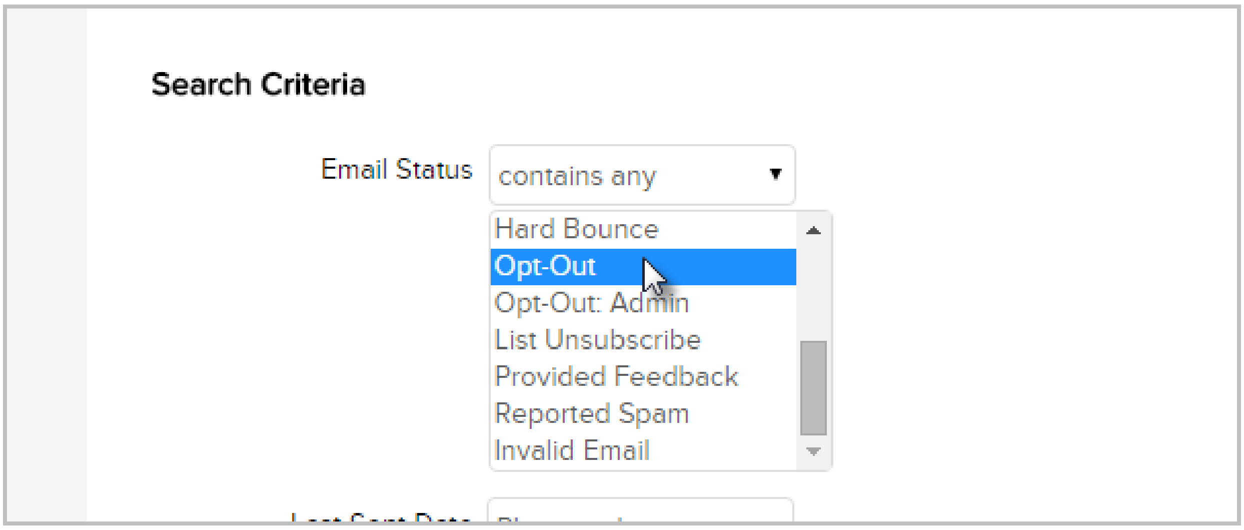


If results appear click **New Search**.



Locating Opt-outs

In the Status box, select **Opt-out**.

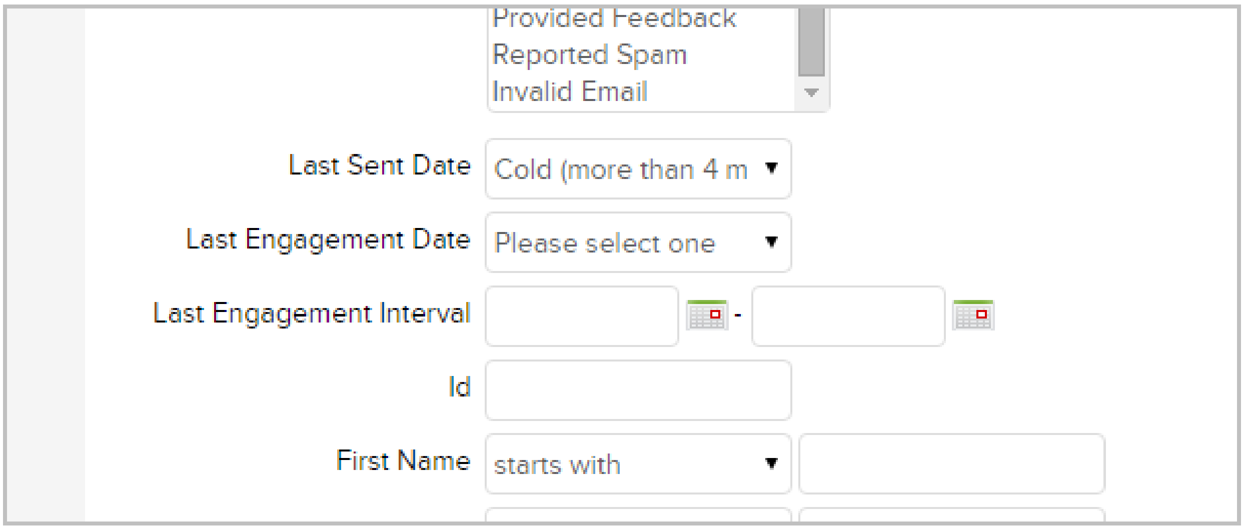


Pro Tip! Note that there are several status options in this search that can also be examined for removal. **Non-Marketable**, **Provided Feedback**, **Reported Spam**: These contacts no longer wish to be marketed to. **Unengaged Marketable:** These contacts haven't opened an email, clicked on a link, filled out a web form, or engaged in at least the past 6 months. **Hard Bounce**, **Invalid Email**: These are bad email addresses.

Further Criteria selections for Opt-outs

If you have a specific time frame that you wish to search for the Opt-outs use the time tools directly below the Status box.

- **Last Sent Date**: This tracks how long ago this contact was marketed to in your application, is it a cold lead (over 4 months ago) or a warm lead (less than 4 months ago.)
- **Last Engagement Date**: You have 2 options you can either search in 3 month intervals up to 12 months, or select your own date range.



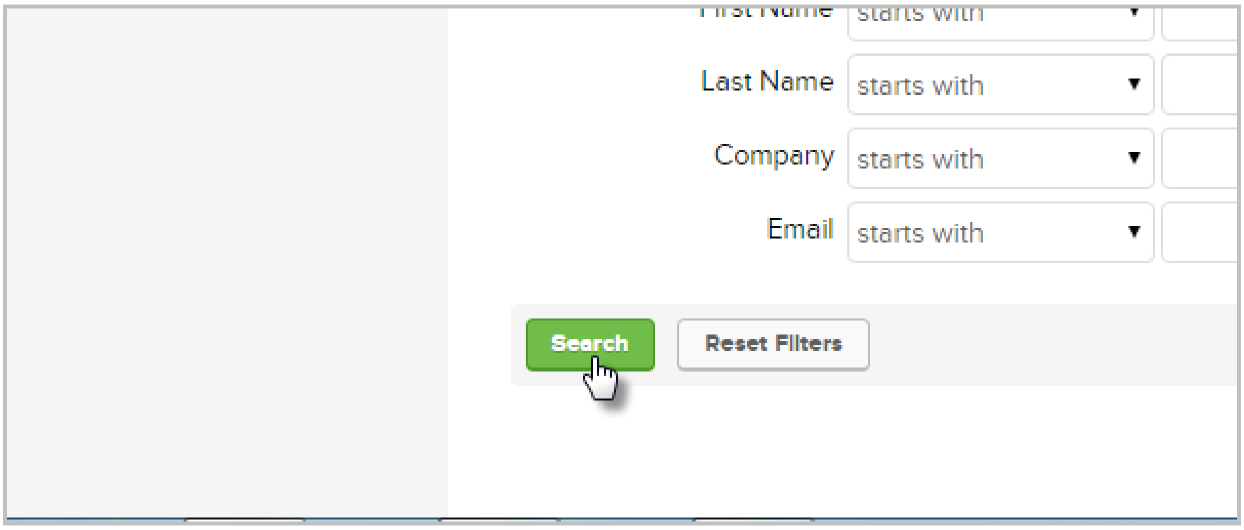
The search criteria offers you basic contact field data to search on several tabs as well including **General** contact info, **Addresses**, **Phone/email**, and your **Custom Fields**.

Click on the **Misc Criteria** tab for more options:

- Search for contacts using **Tag** criteria
- Search for if they did or did not **Purchase Products**
- You can search by the contact's **Date Created**,
- See when the contact was **Last Updated**
- Search for specific content on the records in the **Data Exists** field.

Also, you can search by **Contact Owner**, enter a date range for **Last Open Date**, the **Last Web Form Submission Date**, and **Last Web Form Submitted**.

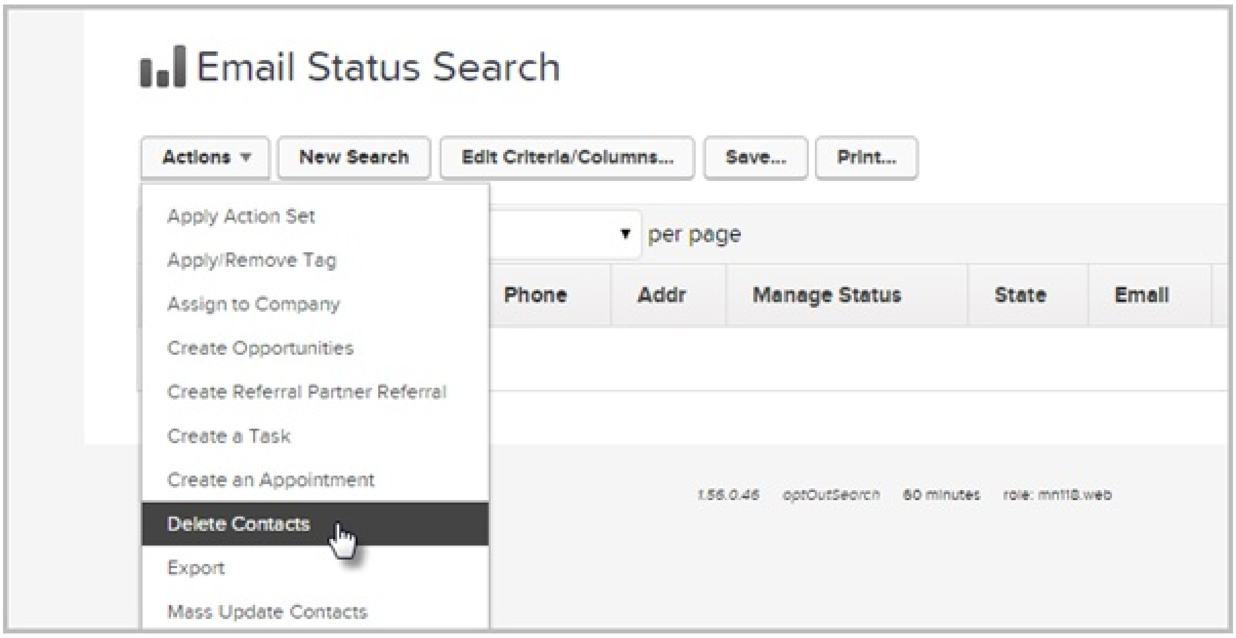
Once you have selected your full search criteria hit **Search**.



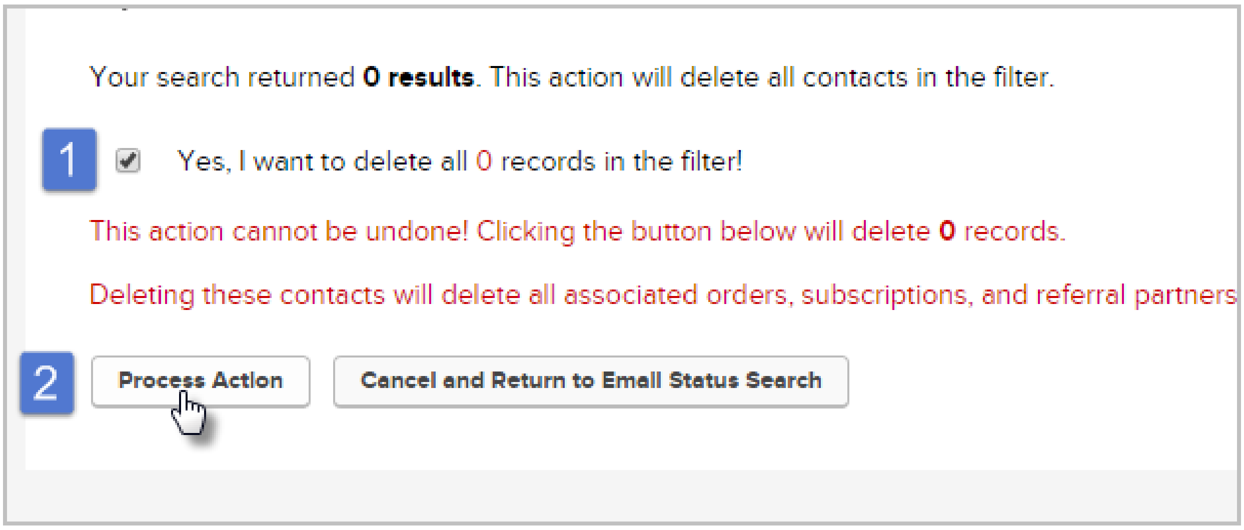
To Remove Opt-outs

Pro Tip! You might want to do an **Export** of the list before you delete your contacts so that you have a record of the Opt-outs. *Once the list is deleted, you cannot review/view them again*.

To remove Opt-outs click on the **Actions** button in the upper left corner of the search results. Then go to **Delete Contacts**.



On the next screen check the box next to the number you wish to delete, be sure to review the warnings on the screen, Deleting these contacts will delete all associated orders, subscriptions, and referral partners. If this is fine, hit **Proceed Action**.



Note: Depending on the number of contacts you are deleting this might take some time to fully process.

Using a different version of Infusionsoft? Click Here to learn more

How to Add a Spam Filter to Opt-In Forms

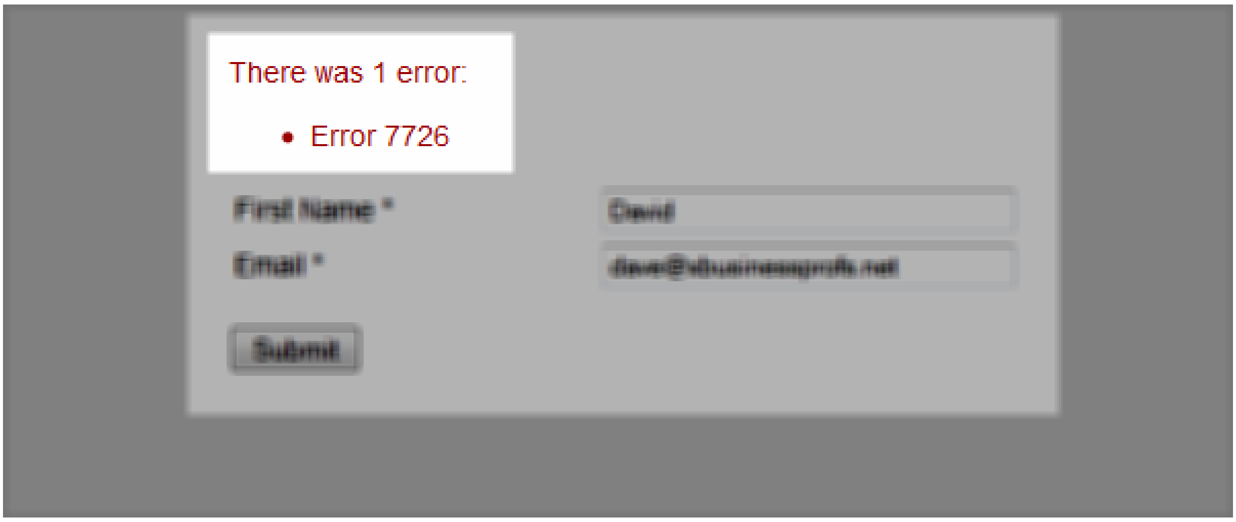
Last Modified on 07/23/2018 3:11 pm MST

You can block domains from submitting web forms. This is particularly useful if someone keeps filling out your form and reporting your email as spam; this type of malicious intent is not common, but can happen.

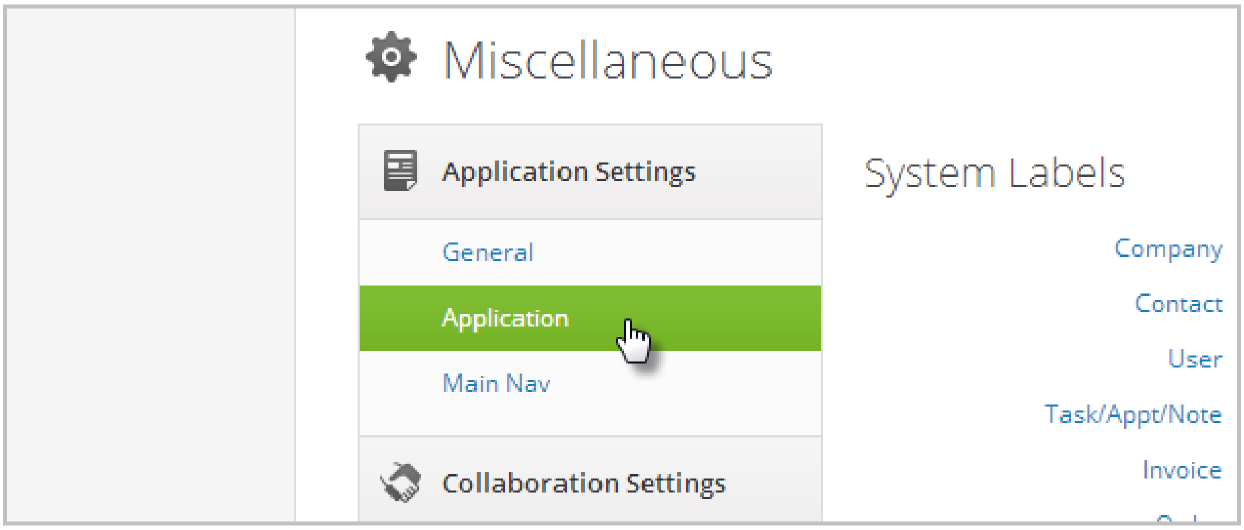
Please Note! This feature applies to both external web forms and internal forms

Please Note! When blocking specific email addresses, for example, *david@xbsuinessprofs.com*, and no one else on that domain, entering *david@xbsuinessprofs.com* will not work. You must enter david as a line item in the Spam Filter and note that *any* email address with david before or after the @ sign will also be blocked!

Protip! The spam filter is a global setting that applies to **all** of the web forms you create. If a blocked domain is entered into the form, the person submitting the form will see the blow error message (Error 7726)

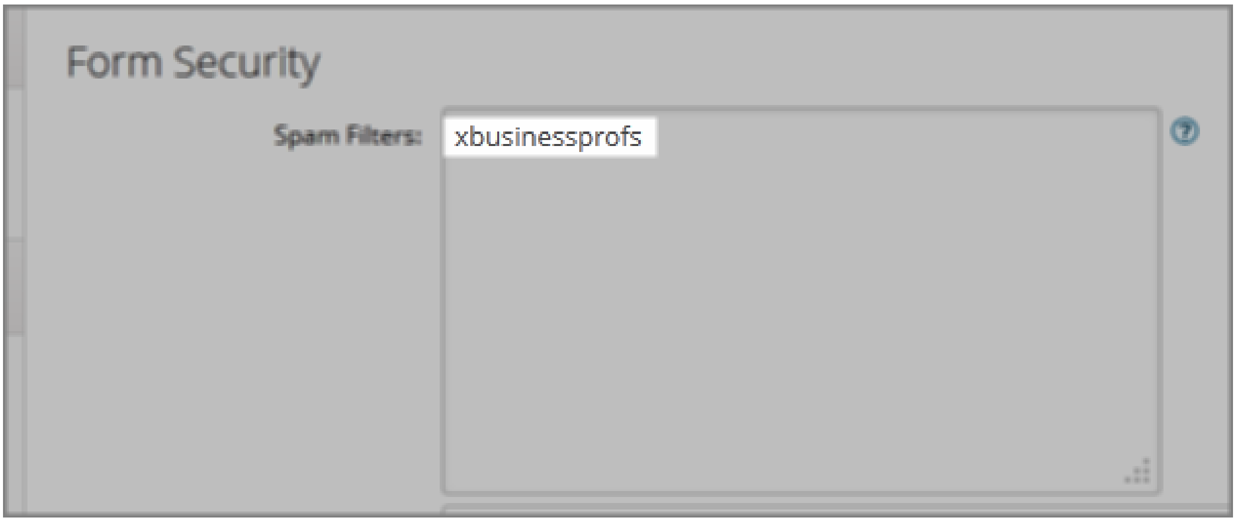


1. Navigate to **Admin** > **Settings** > **Application** Tab



2. Go to **Form Security**

3. Enter domain name(s) you wish to block. For example, to block any email address ending with the domain, "xbusinessprofs.net", just type, *xbusinessprofs* into the SPAM filter. To add multiple domains, just enter the new domain on a new line in the SPAM filter.



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Auditing Imported Subscribers

Last Modified on 07/23/2018 3:12 pm MST

Click here if you are looking for step-by-step instructions for importing records into Infusionsoft

Building and maintaining a quality email list will maximize the success of your marketing efforts. A quality email list starts with ensuring permission has been obtained from all subscribers. Use these requirements below as a guide when importing your lists into Infusionsoft.

Import Requirements

Explicit Permission

Everyone on your marketing list opted-in to receive email communication from your business. The following lead sources are prohibited:

- purchased or rented lists
- joint venture/ affiliate lists
- lists from chamber of commerce
- membership/organization lists
- business partner's list

*When importing contacts, if you select 'No' to the question: "Do you have permission to send marketing emails to these contacts?" the list will be imported with the status: nonmarketable. This is useful, for example, if customers have purchased products and you still need to manage their account, but they will not be sent any email marketing.

Set and Meet Expectations

In addition to obtaining permission from your contacts, it's important to set and meet expectations about content and frequency. For example, if your lead magnet says "Sign up for a free e-book," they will not be expecting to receive a weekly newsletters which can put you at risk for complaints. Transparency is key!

Active and Engaged

When importing, make sure to remove old leads that haven't engaged with your marketing recently. Old/ unengaged lists can put you at risk for spam traps, spam complaints, and hitting blacklists. Going forward, keep your list actively engaged and perform regular list hygiene to remove inactive contacts.

Segmentation

As you create or migrate your list, it's important to remember not all contacts on your list should be treated the same. Are there contacts on your list that are unengaged, previously unsubscribed or hard bounced? Make sure you can distinguish between these types of contacts by exporting not only their email address, but also their current email status. What about subscribers that are interested in a monthly newsletter vs. a customer who's only interested in quarterly product updates? Add relevant tags to specific groups to ensure you're targeting the right segment!

Preventing Risks

Once you import a clean list, keep it healthy by following all best email marketing practices , including performing list hygiene (instructions here and here !) on a regular basis depending on your sending frequency. This will help to prevent spam complaints, hitting spam traps, and landing on a blacklist. For more information, check out our other Help articles on Email Deliverability .

Invalid Hard Bounces

Last Modified on 07/23/2018 3:12 pm MST

What is an Invalid Hard Bounce?

When you try to send an email to an address that does not exist, the email provider will return an “Invalid Hard Bounce” response. This indicates the address is not deliverable and that future attempts to deliver email to that address will also fail. Too many invalid hard bounces from an email marketer is indicative of poor email practices, which will harm your email sender reputation.

Unlike spam complaint rates, there is no real agreed upon industry standard rate when it comes to invalid hard bounces; the fewer the better. At Infusionsoft, we consider anything over 1% per email provider as excessive and at risk for being contacted by the Email Compliance Team.

How Did Invalid Addresses End Up On My List?

Sending to a Cold Email List

30% of subscribers change their email address every year. If you don’t stay engaged with your subscribers, many will change their email address without you knowing. This results in old, invalid addresses on your list. Regular email sending is a great way to keep your list clean and helps prevent too many hard bounces.

If you have email addresses that have not been sent to for more than 4 months, you run the risk of sending to invalid addresses. Use caution when considering email marketing to cold contacts.

Purchased or Scraped List

Generate all email lists organically through lead collection. Any account known to have imported a purchased or scraped list is in danger of having their account suspended.

Poor Lead Generation Practices

We've seen fake email addresses purposely entered into web forms to get to the promised reward like an ebook or access to exclusive information. This typically happens when the potential customer doesn't trust the company behind the promotion.

List Bombing

List bombing happens when a web bot starts to randomly fill out all the web forms it can find with email addresses from who knows where. Obviously this can be very destructive for email marketers for a number of reasons.

Why Invalid Hard Bounces Matter

Invalid Hard Bounces are considered a symptom of poor email collection and bad email marketing practices. As mentioned above, too many Invalid Hard Bounces will damage your sender reputation and make it harder to deliver emails to the inbox.

Resolution

If you have received an email from the Infusionsoft Compliance Team about excessive invalid hard bounces being generated by your application then please read this section carefully and enact the measures needed to reduce your hard bounce rate.

- List hygiene
- Audit your landing pages and check for unsecured web forms
- Audit your lead collection process for incoming invalid email addresses and take the steps needed to promote trust and loyalty to your prospective leads
- Review the best practices guide and make improvements where necessary

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List Hygiene

Last Modified on 07/23/2018 3:13 pm MST

List Hygiene is the practice of cleaning an email list to ensure all addresses are active and deliverable. Regularly implementing this process removes unengaged addresses from your marketing list, which decreases risks for spam traps, complaints, and invalid hard bounces.

First, identify engaged contacts and tag them accordingly. Engaged contacts meet at least one of the following scenarios:

- Recently opted-in via an Infusionsoft hosted web form
- Recently opened an email
- Recently clicked a link within an email
- Rrecently purchased a product or service
- Are currently on a recurring subscription

Typically, contacts are considered engaged if they meet at least one of the criteria above within the last 4 months. After tagging engaged contacts, the next step is to clean the list by removing or opting-out the rest of the contacts since they have been identified as unengaged.

Tag web form activity

Tagging web form activity is the process of identifying and tagging contacts that have recently opted in via a web form.

1. Hover over the Infusionsoft logo in the top left.
2. Under the Marketing column, click on **Reports**.
3. Click on **Web Form Tracking Report**.
4. On the Search Criteria page, in the Form Date fields, select dates by clicking on the calendar icon (General rule of thumb: 120 days.)
5. Click **Search** (This shows you a list of all contacts that filled out a web form in the past 120 days.)
6. Click **Actions** in the top left corner of the list and select **Apply/ Remove Tag**.

7. Click **Create a New Tag**, for example: *Engaged – web form submission*. Click **Create This Tag** and **Save**.
8. Click **Process Action**

Tag opens

Tagging opens is the process of identifying and tagging contacts that have engaged by opening and/or clicking a link within your email.

1. Hover over the Infusionsoft logo in the top left.
2. Under the Marketing column, click on **Reports**.
3. Click on **Email Status Search**.
4. On the Search Criteria page, in Email Status, highlight all marketable statuses: **Unconfirmed, Confirmed (Legacy) and Confirmed**.
5. On the same page, in the Last Open Date fields, select dates by clicking on the calendar icon (General rule of thumb: 120 days.)
6. Click **Search** (This shows you a list of all contacts that opened an email in the past 120 days.)
7. Click **Actions** in the top left corner of the list and select **Apply/ Remove Tag**.
8. Click **Create a New Tag**, for example: *Engaged – Opens*. Click **Create This Tag** and **Save**.
9. Click **Process Action**.

Tag Purchases

Tagging purchases is the process of identifying and tagging all contacts that have recently purchased a product or service within the past 90 days. We do not recommend increasing this time period.

1. Hover over the Infusionsoft logo in the top left.
2. Under the E-commerce column, click on **Orders**.
3. On the Search Criteria page, click on the **Misc Criteria** column.
4. Scroll down to the Purchase Date Interval drop down menu and select **Last 90 days**.
5. Click **Search** (This shows you a list of all contacts who have purchased within the last 90 days.)
6. Click **Actions** in the top left corner of the list and select **Apply/ Remove Tag**.
7. Click **Create a New Tag**, for example: *Engaged – Purchases*.
8. Click **Create This Tag and Save**.

9. Click **Process Action**.

Opt out the rest

Now that you've identified and tagged all contacts that have recently engaged, it's time to opt out all un engaged contacts.

1. Hover over the Infusionsoft logo in the top left.
2. Under the CRM column, click on **Contacts.**
3. Click on **Start Over** to go to the Search Criteria page.
4. Under the Tag Ids drop down menu, select **Doesn't have ANY** of these.
5. Highlight all of the engaged tags that were just created and click **Search** (This shows you all contacts in the database that does not have at least one of these tags.)
6. Click **Action** in the top left of the list and select **Update Opt in/out status** to mass opt out this entire list of unengaged contacts.

Turn on automated list management

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Monitoring Email Complaints

Last Modified on 07/23/2018 3:14 pm MST

As a company, Infusionsoft sustains a deliverability rate of over 98%. That means that 98% (or more) of the emails sent through Infusionsoft servers are accepted by the recipient's email servers. However, your individual reputation also plays a role in whether or not your emails are delivered and sent to the inbox. Your deliverability can change at any time as negative or positive changes are made to your email marketing practices .

To mitigate complaint rate issues, monitor your rates and recipient feedback so that you can make adjustments as needed.

1. Go to Marketing > Reports
2. Click on the **Email Complaint Summary** Report.
3. Set a date range for the search and click on the **Columns** tab to select the columns to display on the report. The fields listed as custom columns will be displayed.
4. Click on the **Search** button.
5. The email complaint summary chart shows the day, how many emails were sent, and the number of complaints that were made.
   These statistics are displayed in a line graph allowing you to view your progress toward a more acceptable reputation.
   - ISP (Internet Service Provider) complaints are SPAM complaints made to email clients such as Gmail, Hotmail, and Yahoo. These complaints directly affect your sending reputation. Note: An acceptable ISP complaint rate is .1% or 1 complaint per 1,000 emails sent.
   - Internal complaints are registered when someone opts out of your mailing list. When this happens, Infusionsoft changes the contact's email status to "opted-out" and asks the contact if the email they received is SPAM. These complaints are closely monitored by Infusionsoft as we work to ensure the highest delivery rates possible for ALL Infusionsoft customers. You should also monitor your own SPAM and internal complaints.
6. To View People Who Reported SPAM or Provided Feedback, go to **Marketing > Reports**.
7. Click on the **Email Status Search** Report.
8. Select **Provided Feedback and Reported Spam** from the email status list. Hold down the CTRL key on your keyboard to select more than one.
   - Provided Feedback: This means the person marked the email as SPAM through

their ISP (e.g. AOL.)
    - Reported Spam: This means the person marked the email as SPAM through an Infusionsoft opt-out link. When this happens, the person has the option to add comments.
9. Click on the Search button.
   This report will show you who provided feedback or reported spam. You can click on the Opt Status link to view more details and click on View Status History to read the comments the contact posted when they registered an internal SPAM complaint. Comments are not required. If you do not see any comments, the person who submitted the SPAM complaint did not post a comment.

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Protect Your Web Forms From Bot Attacks

Last Modified on 07/23/2018 3:14 pm MST

List bombing occurs when an email address was submitted to your web form by someone other than the owner of the address and you unknowingly sent unsolicited email. While one or two instances will surely go unnoticed, this problem can become especially significant if it occurs in bulk.

The Cause: Subscription Bombing

The most prevalent cause for this is what's known as "subscription bombing", which is an attack designed to overload a recipient's inbox with unsolicited email, thus rendering their inbox useless (imagine how useful your inbox would be if it received over 100 emails per minute). The attacker essentially weaponizes your marketing automation by using a script or bot to submit the email address of the target, or more often multiple targets, into as many web forms as possible. The attacker then relies on your email campaigns or broadcasts to contribute to a barrage of unwanted emails aimed at their target - all without your knowledge.

The Impact: Greatly reduced email deliverability

Allowing your forms to be used as an attack vector to send unsolicited email, especially in significant volumes, negatively impacts your (and our) email sender reputation with mailbox providers (e.g. Gmail, Yahoo, etc.) and blacklisting providers (e.g. Spamhaus). Because sender reputation is so critical to inbox placement, you are effectively held accountable for the all email that you send - including email sent because of a bot attack on your web form.

The Solution: CAPTCHA and COI

- Use CAPTCHA - Google's ReCAPTCHA is enabled by default on web forms created with Infusionsoft, but you will need to setup CAPTCHA on your own if you use 3rd party web forms.
- Use Confirmed Opt-In (COI) AKA "Double Opt-In" (DOI) - When used correctly, a COI sequence will send no more than one email per form submission per recipient. While

this doesn’t completely stop you from unknowingly sending unsolicited email, it does help limit the amount of unsolicited email that you send, thus reducing the potential damage to your sender reputation. In this way, COI can help to prevent a subscription bombing attack from compounding.

Email industry experts and blacklist moderators agree: the best defense against subscription bombing is using both CAPTCHA and COI. Remember, while Infusionsoft does not require the use of CAPTCHA or COI, we do require that you obtain explicit permission to send email, and unsecured web forms provide the possibility for you to unknowingly violate that requirement.

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Spam Complaints

Last Modified on 07/23/2018 3:15 pm MST

Spam is essentially unsolicited email. However, when it comes to the business of email marketing, spam is whatever an email recipient marks as spam. Every person you email is empowered to report any email to their ISP as spam. The ISP then informs us through a Feedback Loop where the spam complaint came from and who sent it.

It is generally accepted in the email marketing industry that spam rates over 0.1% (1 complaint per 1000 emails sent per provider) are excessive. This metric is tracked per email provider and not as global rate.

Common Causes of Spam Complaints

Lack of Permission

When a contact shares their information with you, make it absolutely clear that they are signing up for email marketing from your company. We recommend using a checkbox and a double opt-in sequence to ensure that permission has been granted.

Specific Examples:

- A list of email addresses was purchased from a third party.
- The list of email addresses was borrowed from another user/business.
- The list of contacts was obtained from a trade-show or event
- Someone gave you their business card
- A customer purchased a product from your company and they are automatically signed up for a weekly newsletter
- A customer requests a free e-book and they are automatically signed up for the weekly newsletter as well

For more details on email marketing expectations grab a copy of our Best Practices PDF

Poor Expectations

Contacts will often mark unexpected emails as spam. Set expectations for the recipient about your emails in regards to what, when, how often, and from whom.

Specific examples of poor expectations observed at Infusionsoft:

- The contact opts-in for ONLY the monthly newsletter, but they unexpectedly receive weekly or daily promos/offers
- You inform your recipient that they will be receiving monthly newsletters, but you don't get around to it for a few months, then suddenly start to 'blast' emails to make up for lost time.
- You keep a very consistent pattern of a weekly newsletter then decided to send daily with no warning or consent from your customers
- Customers sign up for what appears to be an informative newsletter, but the emails only consists of ads or promotional material
- The content of the email does not relate to the content of the landing page
- The customer receives great email marketing for a time, but on occasion they get emails not relating to what they signed up for
- From address changes or is different from the landing page or business name

Remember, Infusionsoft has great tools to help keep your email frequency consistent and within the expectations you set. For more details on email marketing expectations grab a copy of our Best Practices PDF

Inconsistent Branding

Branding needs to be consistent from the signup page to the email. If the email recipient doesn’t recognize who sent the email there is a good chance it will be reported as spam.

Hiding the Unsubscribe Link

On occasion we’ve seen our customers hide the unsubscribe link so that an email recipient can’t remove themselves from the email marketing list. Not only is this illegal and a violation of the Infusionsoft Acceptable Use Policy,, but it causes more spam complaints because it leaves the recipient no other options to opt out.. Don’t do this, as you risk having your email functionality suspended.

Spammy Subject Lines

Describe clearly and directly what you are sending. People have developed an amazing ability to spot spam based on the subject line alone and will flag an email as spam without even opening it. Only use subject lines that are specific and relevant to your content.

Avoid anything that is deceiving or misleading, such as “RE:” or “FW:” Avoid vague phrases like “What’s up?” or “A quick reminder”. Avoid spam related words like “FREE” or including monetary amounts like “Earn $500 Today”.

Why Spam Complaints Matter

Infusionsoft wants to deliver our customer’s emails to their customer’s inbox. All of our customers share in our email network and if our network is deemed to send too much spam too often then we may lose our ability to do so or it will be greatly inhibited.

Keeping our spam rates low is a great way to show the ISPs that accept our emails that we are a responsible email sender and that our emails are wanted and expected by the recipient. If the ISP believes that emails from Infusionsoft and its customers is wanted then all of our customers have a much better chance of being successful email marketers.

How to Fix Spam Related Issues

If you have received an email from the Infusionsoft Compliance Team about excessive spam complaints being generated by your application then please read this section carefully and enact the measures needed to reduce your spam footprint.

- Audit your email marketing list and ensure that you have explicit permission to send email marketing to everyone on the list. If you have permission questions then reach out to support or re-read the Best Practices Handbook .
- Audit your webforms and landing pages to make sure that permission is voluntary, the expectations are clear and the branding is consistent.
- Audit your email sending practices to verify that your sending schedule adheres to the expectation set on the landing pages.
- Verify that subject lines are not spammy
- Double check your from address and ensure that it is consistent and recognizable
- Perform list hygiene

Once you have completed these steps report back to the Email Compliance Team through this link

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Spam Traps

Last Modified on 07/23/2018 3:15 pm MST

Spam traps are commonly used by inbox providers and blacklist providers to catch malicious senders or legitimate senders with poor email marketing practices. A spam trap looks like a real email address, but it doesn't belong to a real person nor is it used for any kind of communication. Its only purpose is to identify spammers and senders not utilizing proper list hygiene. There are 3 types of spam traps:

- **Pristine** - Email addresses that are hidden within a website's code. The purpose of pristine traps are to identify email marketers who build their lists by scraping sites or purchasing data.
- **Recycled** – Email addresses that were once valid, have become dormant, and then repurposed by an email provider. Someone could have used this email address to opt in at one point, but the address has since been abandoned. The purpose of of this trap is to identify email marketers who do not perform regular list hygiene.
- **Typo** - Mistyped email addresses , such as: me@mgail.con. The purpose of a typo trap is to identify marketers with questionable lead collection processes.

Why does it matter?

The penalty for emailing spam traps can range in severity, depending what type of trap it is, how often you email it, and the group that runs the trap(s). This can result in IP addresses and/or sending domains being blocked and/or blacklisted which causes serious deliverability issues.

How do you identify and deal with spam traps?

Spam traps are a symptom of poor lead collection practices and/or list maintenance practices. If you are sending to spam traps, there is a good chance you are also sending email to other leads that did not opt-in or who are no longer engaged with your email marketing.

Resolving spam trap issues aren't about finding and removing the trap(s) from your list, but about addressing poor lead collection and list hygiene practices. In fact, the anti-spam organizations purposefully make it very difficult to identify spam traps and do not provide a list of maintained traps for this very reason.

There are some common characteristics that can be used to clean spam traps from email lists. Pristine and typo spam traps will never open or click on the emails that are sent to those addresses and recycled addresses will have at least a 6 month period with no opens or clicks.

To minimize the risk of sending to spam traps keep your list active and engaged. Make sure to perform:

- List Hygiene on your list to opt-out contacts with no engagement and then going forward, use the new...
- Automated List Management tool. Also, only send emails to those leads that have given...
- Explicit Permission for your marketing.
- Lastly, consider using a Double Opt In process to confirm the leads are interested and that their email address is spelled correctly.

Avoid importing leads into your system that you do not know the history of the leads. Some examples to avoid are shared lists, 3rd party purchased lists, and old lists that you might have laying around. This is also a requirement of the Infusionsoft Acceptable Use Policy .

More information on spam traps can be found in this article: https://blog.returnpath.com/its-a-trap-avoiding-and-removing-spam-traps/

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URIBL Greylisting

Last Modified on 07/23/2018 3:15 pm MST

How do links on the URIBL Greylist affect email delivery?

- URIBL maintains three types of lists: white, grey and black. URIBL "blacklistings" have the most impact because it is enabled by default among email administrators. "Greylistings", on the other hand, are not enabled by default and have a minimal impact against senders. The domain, "infusionsoft.com" is currently greylisted on URIBL as are most prominent bulk email senders.
- We ask that you please do not submit requests to de-list the infusionsoft.com domain from URIBL; the current greylisted status is normal.

SpamAssassin relies on a third-party service, URIBL, to determine the reputation of hyperlinks within an email message. URIBL is a domain-based reputation list and is independently operated.

URIBL maintains three types of lists: white, grey and black. URIBL "blacklistings" have the most impact because it is enabled by default among email administrators. "Greylistings", on the other hand, are not enabled by default and have a minimal impact against senders. The domain, "infusionsoft.com" is currently greylisted on URIBL as are most bulk email senders.

If a hyperlink in an email is listed on the URIBL greylist, it will have minimal impact on deliverability. However, some smaller ISPs and ESPs that have enabled URIBL greylist blocking will impact the delivery of your email.

Unfortunately, we don't have any further insights into the specific causes of URIBL listings, except that it relates to our customers sending emails to unused, abandoned email addresses. We recommend you continue to demonstrate sensible, CAN-SPAM email marketing practices in order to maintain and improve the reputation of email sent from the Infusionsoft network.

You can remain confident that Infusionsoft is a trustworthy network to send permission-based email marketing messages from:

- Our customers send over 70,000,000 emails weekly.
- Our customers experience 99.55%+ average email deliverability. Confirmed opt-in email

addresses experience even higher deliverability.

- Our email infrastructure is DKIM/SPF compliant and is designed for high-performance email delivery.
- We have a dedicated team that monitors and responds to abuse and compliance matters so we can minimize threats and maintain our reputation among other ISPs.

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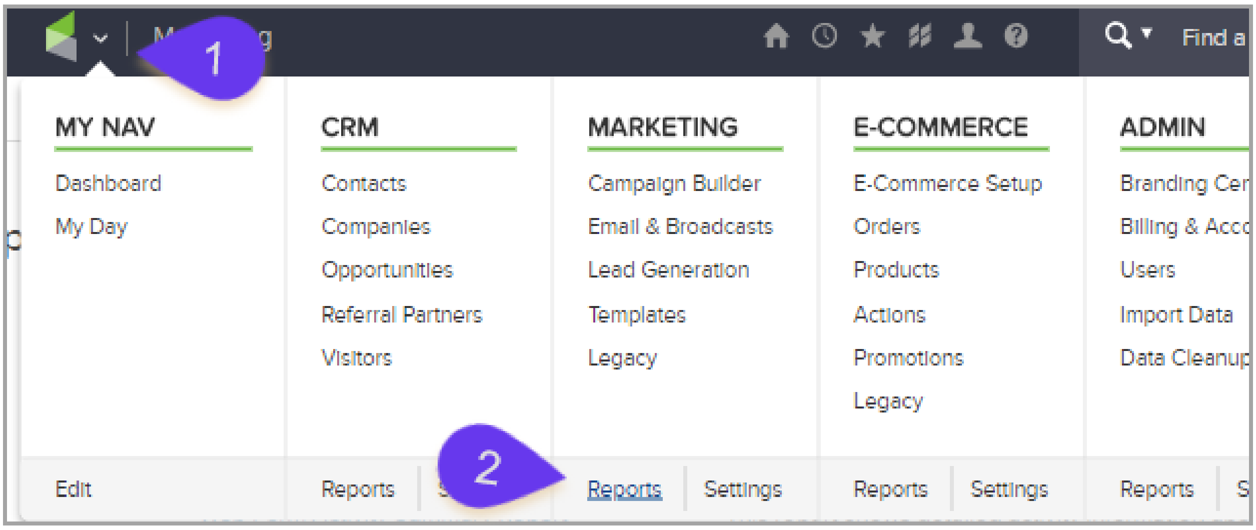
Unsubscribe Report

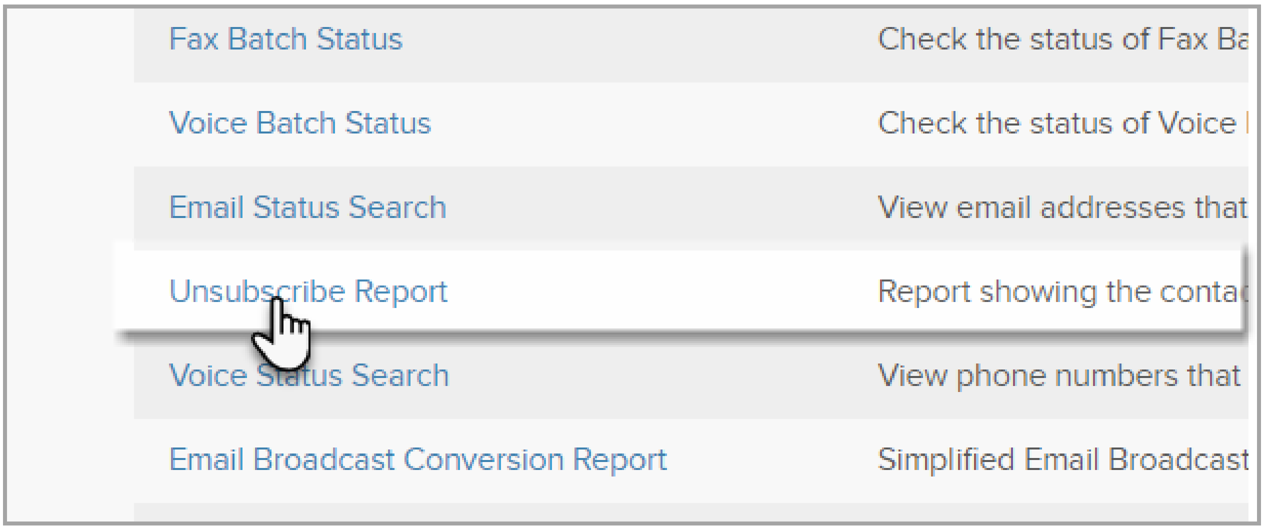
Last Modified on 07/23/2018 3:16 pm MST

The Unsubscribe report shows you the contacts that have globally unsubscribed and what feedback they have submitted. When a contact clicks the unsubscribe link in an automated email, they are redirected to a page with the following options:

1. Go to "Marketing > Reports"

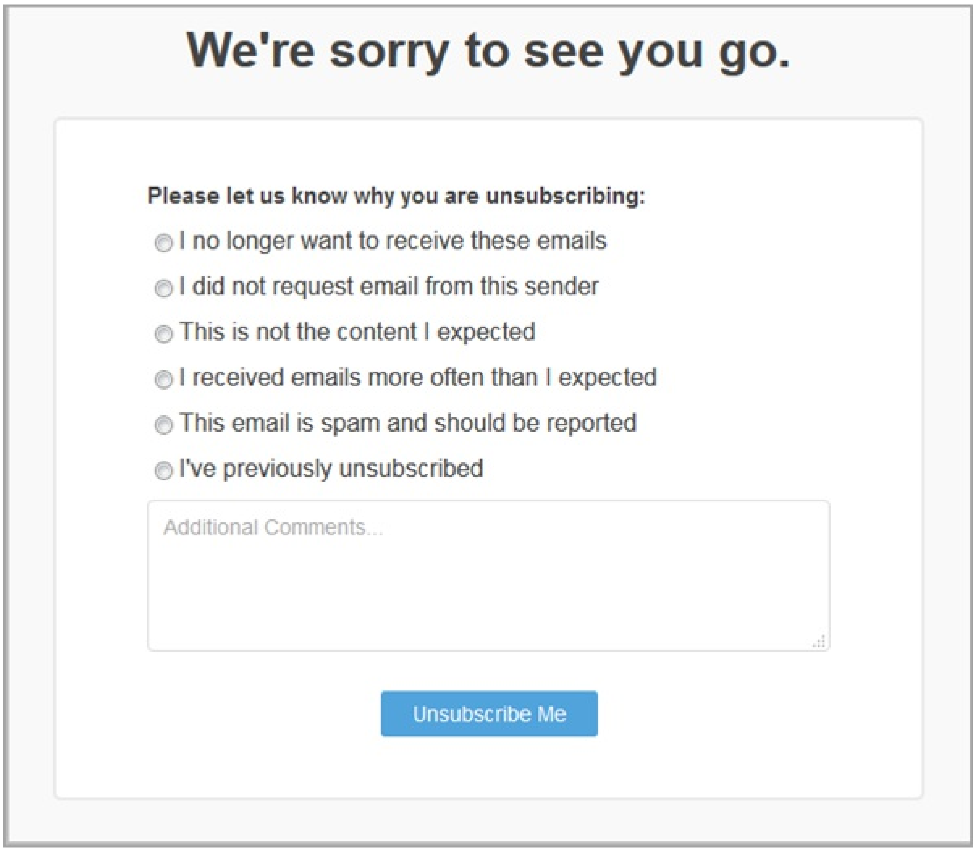


2. Click "Unsubscribe Report "



The report will show you which option the contact chose and any additional feedback they gave prior to clicking the **Unsubscribe Me** button on the page.

When a contact clicks the unsubscribe link in an automated email, they are redirected the following page of options:



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Create A Lead Source

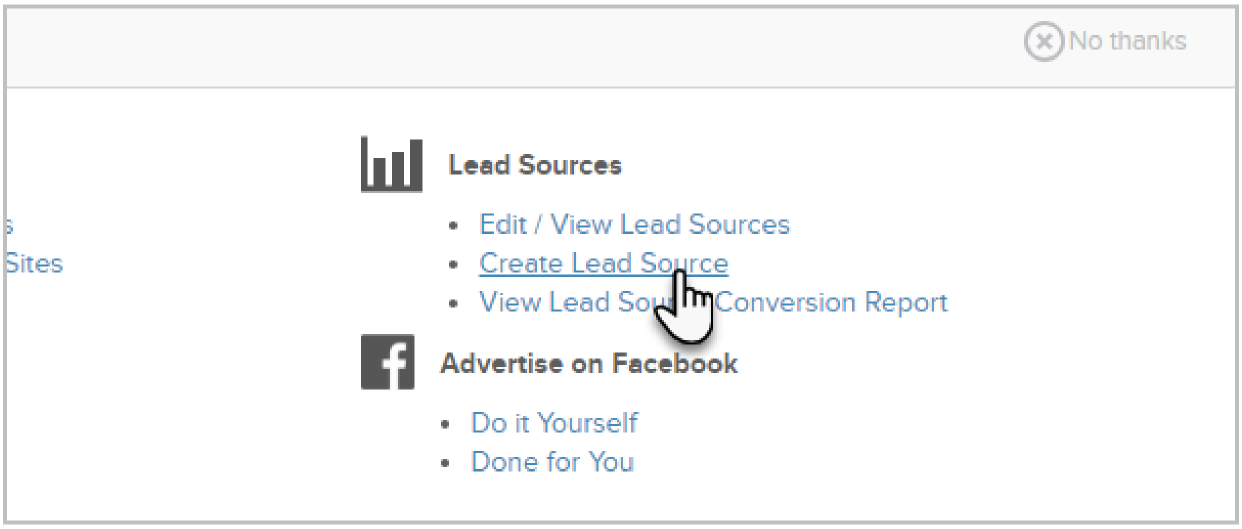
Last Modified on 07/23/2018 3:16 pm MST

Lead sources are specific methods or sources your company uses to attract qualified traffic to your website or location. Infusionsoft automatically generates lead sources through the Infusionsoft web tracking code you've embedded into all of your web properties. Online lead sources are tracked automatically. You should only need to manually create lead sources for offline sources that cannot be tracked automatically, however you may need to edit auto-created lead sources to add more detail to the record (e.g. message content or date range.)

A lead source is automatically assigned to contacts when they fill out an online form or make a purchase. You can manually assign lead sources when importing a list of contacts or manually entering a contact into Infusionsoft. The lead source field displays on contacts and opportunities and can be used to filter searches and reports.

1. Go to **Marketing** > **Lead Generation**

2. Click on the **Create Lead Source** link in the Lead Sources section.



   - **Name**: The lead source name is displayed on contacts, opportunities, and various reports. It should be short but descriptive.
   - **(Optional) Description**: The description may include additional details about the advertising agreement or terms, including the internal team member responsible for the advertising relationship.
   - **Category**: The category is used to group similar lead sources together for reporting

purposes. Select a predefined lead source category from the drop-down or click on the Add Category button to create a new one.

- **Vendor**: Select a vendor from the drop-down, or create a new vendor by entering the vendor name in the space provided. *Note: The vendor is the business you pay for the advertising*.
- **Medium**: Select a medium from the drop-down, or create a new medium by entering the medium name in the space provided. Note: The medium is the type of advertising (e.g. event booth.)
- **Message**: Select a message from the drop-down, or create a new message by entering it into the space provided.
- **(Optional) Start and End Date**: Choose a start and end date for the advertisement, if this is a limited run ad.
- **Status**: Select a status. The status is used to filter lead source reports. *Note: Inactive lead sources cannot be assigned manually. They are hidden from user view in contact and opportunities*.

3. Click on the **Save** button to create the new lead source or apply the changes to an existing one.

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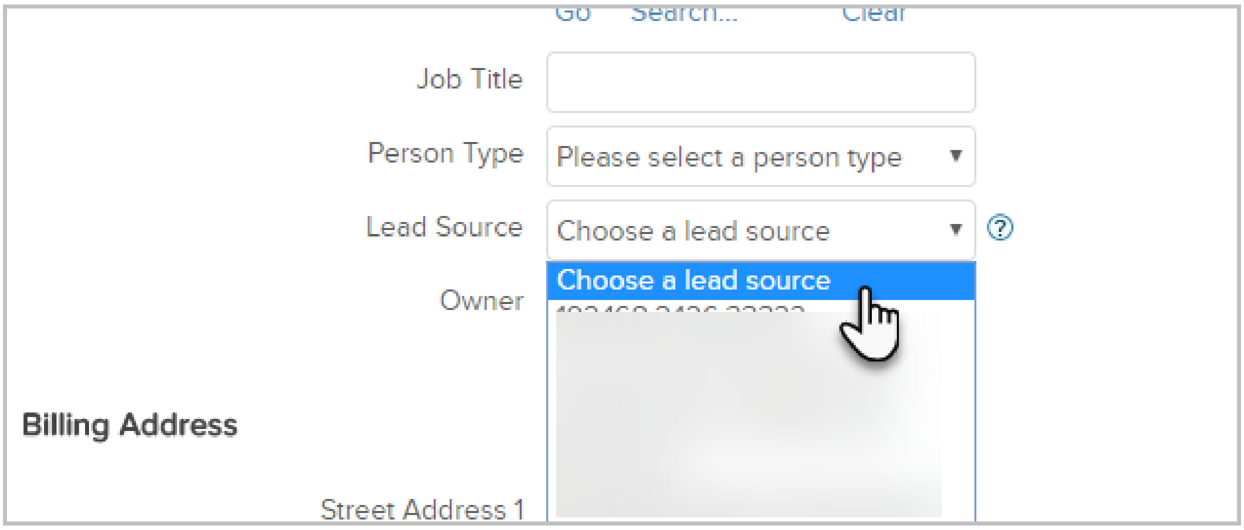
Manually Assign A Lead Source To A Contact

Last Modified on 07/23/2018 3:16 pm MST

Lead source s are automatically created and assigned when a contact fills out a form online or makes a purchase. However, you will need to manually assign a lead source to contacts you add to Infusionsoft manually. A lead source is defined as the first point of contact. This can be tracked when the first point of contact is online. If a contact's first point of contact is in person or by phone, you may need to ask the contact how they first learned about your business.

The ability to update a contact's lead source or mass update a list of people is controlled through user permissions .

Open the contact record and on the left side the page, select a lead source from the drop-down and click on the **Save** button at the bottom of the page.



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Track Lead Source Expenses

Last Modified on 07/23/2018 3:17 pm MST

Cost versus benefit should be a huge factor when evaluating paid lead sources. This kind of evaluation allows you to assess the return on your investment (ROI) so that you can invest more money into the lead sources that produce the desired results and discontinue using the ineffective ones. A lead source should achieve one or more of the following goals:

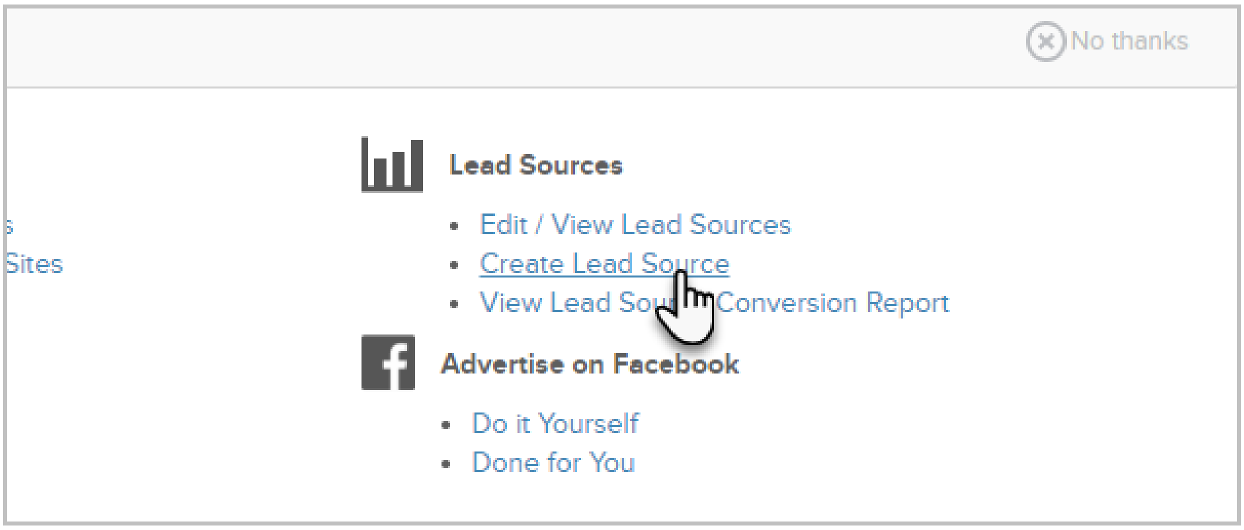
- Attract visitors to your website or place of business. This allows you to expand awareness of your business and earn the attention of potential buyers.
- Grow your list. This gives you permission to send marketing materials to more people and remain top of mind until they are ready to buy.
- Produce paying customers. The best lead sources produce the highest amount of customers for the least amount of cost.

Adding lead source expenses is critical in analyzing acquisition costs for leads and customers. A lead source may involve a one time expense (e.g. a trade show fee) or a monthly recurring expense (e.g. a banner ad on a website). One-time expenses must be entered manually when they occur. Recurring expenses are automatically applied at the beginning of each monthly billing cycle.

Infusionsoft totals lead source expenses and then compares them to the number of leads, the number of customers, and the amount of revenue generated. This data is used to produce lead source ROI reports and calculate cost per lead and cost per customer.

1. Go to **Marketing > Lead Generation**

2. Click on the **Create Lead Source** or **Edit / View Lead Sources** to modify an existing one.



3. Click on the **Expenses** tab.

4. Click on the **Add Expense** button.
    - One time expenses should be entered on the date they occur. A one time expense may be incurred for a limited run print or media advertisement, an event sponsorship, or for the purchase of banner space on a website. The lead source expense is "billed" on the date that it is entered.
    - Monthly recurring expenses are entered once and billed automatically at the beginning of each cycle. This type of expense may be incurred for pay per click advertising with a consistent monthly budget, a paid advertising service (e.g. outsourced social media management), or a recurring print or media advertisement. If a recurring expense is variable, enter the budgeted amount, and then edit the expense to adjust it up or down after the actual billing occurs.
        - The start date represents the first bill date. This bill date can be back dated. The system will bill the recurring fee on this date each month.
        - The end date represents the end of the ad duration.

5. Click on the **Save** button to enter the expense.
   The total lead source expense is the sum of the individual one time and/or recurring expenses. The ROI percentage is calculated based on total revenue this lead source has generated from customers divided by the total lead source expense. A lead source ROI over 100% means the lead source is producing more revenue than expense.

Evaluate Lead Source Effectiveness

Last Modified on 07/23/2018 3:17 pm MST

There are two lead source reports that help you evaluate how well a lead sources or a group of lead sources are performing: Lead Source ROI and Lead Source ROI by Category. These reports allow you to make educated choices about where to (or not to) spend your marketing dollars. Lead sources are automatically created and assigned to one of the five standard lead source categories (Direct, Organic, Social, Referral, and Paid) through the Infusionsoft web tracking code. You can also manually create lead sources and lead source categories. You must track lead source expenses consistently to produce relevant and accurate ROI reports.

If you are using the Infusionsoft web tracking code in all of your web properties, lead sources are also automatically assigned to contacts when they sign up for something or make a purchase. Users should assign lead sources to contacts manually when importing a list or entering a contact manually. These reports are available through **Marketing** > **Lead Generation** > **Return on Investment**.

The lead source reports provide you with the following statistics:

- Total Expenses for an individual lead source or lead source category
- Total Revenue for an individual lead source or lead source category
- ROI (Total Revenue minus Total Expense/Total Expense)
- Number of Visitors
- Cost per Visitor (Total Expense divided by Total # Visitors)
- Number of Contacts
- Cost per Contact (Total Expense divided by Total # Contacts)
- Number of Customers
- Cost per Customer (Total Expense divided by Total # Customers)
- Visitor to Contact conversion percentage (# Visitors with lead source divided by # Contacts with lead source)
- Contact to Customer conversion percentage (# Contacts with lead source divided by # Customers with lead source)

Lead Source ROI

The Lead Source ROI report provides statistics for individual lead sources. Click on report hyperlinks to view the lead source category ROI report or the specific list of contacts or customers assigned to a lead source. The most common filters include lead source, lead source category and relevant date ranges. The expense Incurred date range is especially important. Align the expense incurred end date with the end date of monthly recurring billing if a lead source involves recurring expenses otherwise an expense may be included in the report before the results have been tracked. Click on the Misc. tab to filter this report by tag, sequence, purchased products, opportunity stage, and web form to evaluate effectiveness of a specific lead generation effort, product promotion, or sales process.

Lead Source ROI by Category

The Lead Source ROI by Category report provides summary level lead source data that can be used to evaluate specific methods of lead generation. This report aggregates the data for individual lead sources to display the same data at the category level. This can help you evaluate the overall performance of specific groups of lead sources. The default lead source categories are Direct, Organic, Social, Referral, and Paid, however you can also create custom lead source categories assign lead sources to them. You can filter this report by lead source, lead source category, relevant date ranges, tag, sequence, purchased products, opportunity stage, and web form.

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View Your Website Visitors

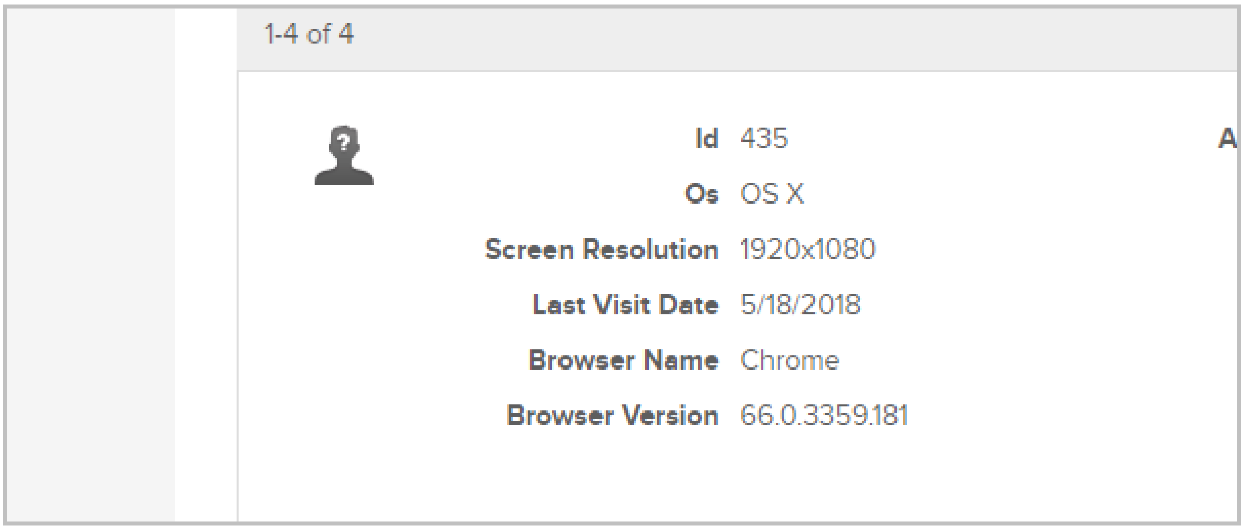
Last Modified on 07/23/2018 3:18 pm MST

A visitor is an unidentified person who visits a website, landing page, online store, or other web page that includes the Infusionsoft web tracking code. The web tracking code captures visitor activity and stores it in Infusionsoft. A visitor record is created for each unique visitor (based on cookies and IP address.) Aggregated visitor data is available through the Web Analytics and Lead Source ROI reports.

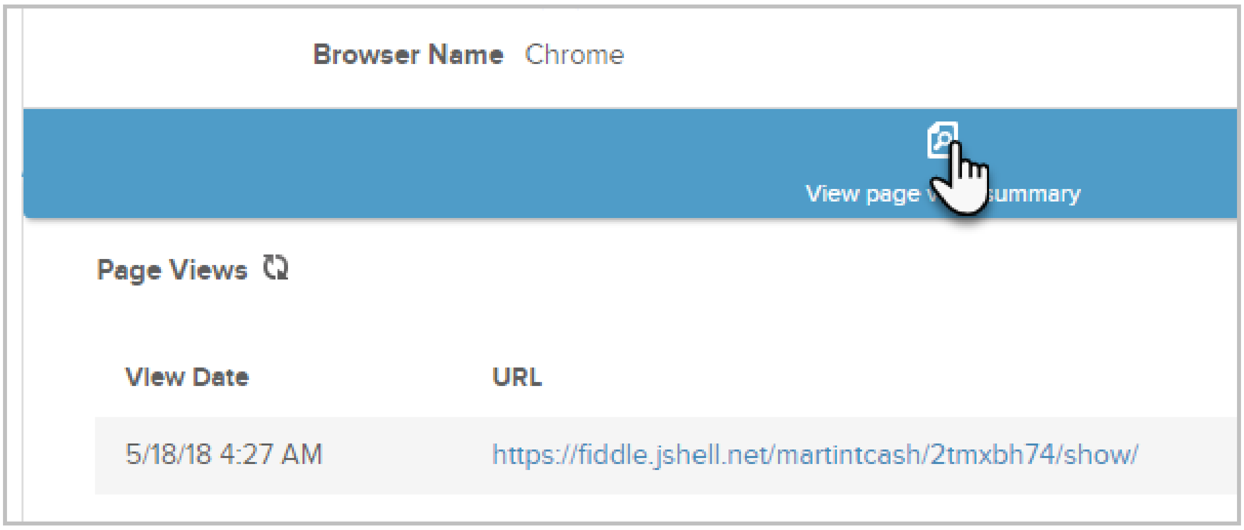
Individual visitor records are created, and data is tracked as long as a visitor is actively engaging with your web content. Visitors are considered inactive if they have not visited one of your web properties within the last 90 days. Inactive visitor data is archived. It is included in reports, but you can no longer access the individual visitor statistics.

The visitor data generates a web profile within a contact record as soon as the visitor signs up for something or makes a purchase. Visitor data is also merged with existing contacts as soon as they confirm their identity through an online interaction (form submission, purchase, or email link click.) If a visitor views your web properties from more than one location, the system generates multiple visitor records. The duplicates are resolved as online interactions align a visitor identity with an existing contact.

The web demographic data for individual visitors helps you identify browsing trends, such as device, operating system, browser, plug-ins, and more. This visibility helps you optimize your web properties to ensure a quality experience for most visitors.



1. Go to **CRM** > **Visitors**
2. Click **New Search** to filter the list by date created, system or browser information, or lead source information, then click **Search**.
3. Under each visitor, click on **Page Views** in the interactive panel to view URL and time on page for the last 10 visits.



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Embed The Infusionsoft Tracking Code Into Your Website

Last Modified on 07/23/2018 3:18 pm MST

Infusionsoft automatically tracks online activity for Infusionsoft hosted pages: landing pages, web forms, order forms, storefront and shopping cart and thank-you pages. However, this only gives you a partial picture of online marketing interactions. If you would like to extend this tracking to other website assets, you will need to add the Infusionsoft tracking code to produce a well-rounded picture of visitor activity

1. Go to **Marketing > Lead Generation**
2. Click on **Get Tracking Code for Your Websites**
3. Highlight the analytics code, and then right click on it to copy it to your clipboard.
4. Paste the code before the close body HTML tag, if you edit your website through Dreamweaver or another code editor. If you are using Google analytics, you can paste the Infusionsoft tracking code below it. Put this code on each individual web page or add it to the footer code that is called into every page of your website.

Example Code

```
/*This is the Google analytics code*/


/*This is an example of the Infusionsoft tracking code*/
```

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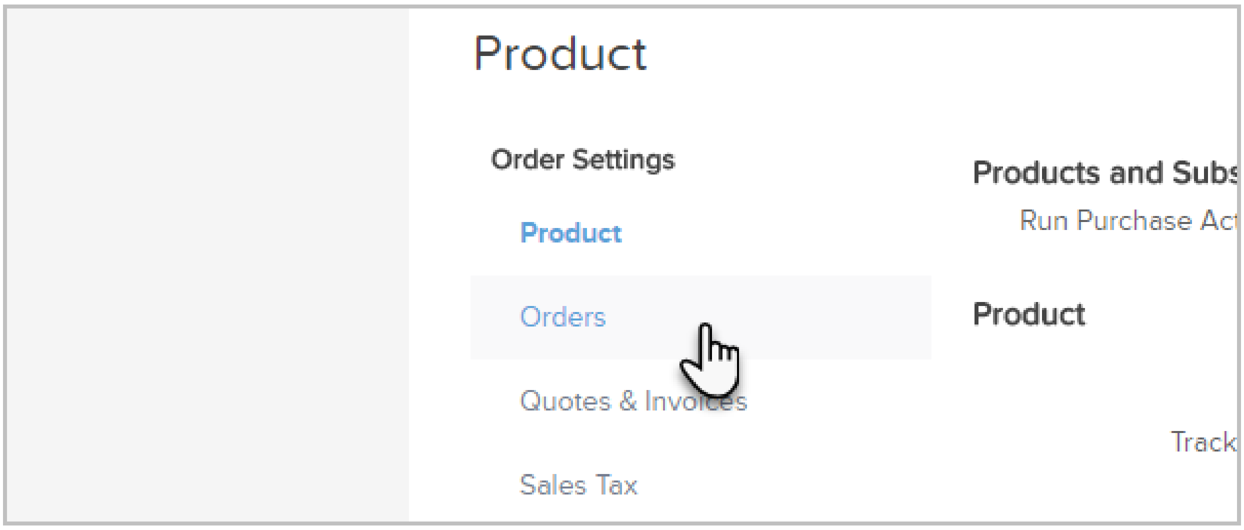
Default Billing Settings

Last Modified on 07/25/2018 1:29 pm MST

The **Billing Settings** define global defaults for accepting initial payments and handling failed auto-charge payments. Some of the default settings can also be customized for individual order forms, shopping carts or when creating a manual order.

1. Go to **E-Commerce** > **Settings** in the master nav.

2. Click on **Orders** in the settings menu.



3. Go to the *Billing* section to review and edit the following defaults.
    - **Currency Locale**: This setting controls the currency symbol displayed on products in the shopping cart, order forms, and invoices. Select from US Dollar, Euro, Pounds, Rands, Australian Dollar, Canadian Dollar, or New Zealand Dollar.
    - **Payment Types**: These Payment Types show up when processing manual payments in an Order Record.
    - Charge Defaults:
        - **Default Auto-charge**: Set to Yes if you want the system to automatically charge credit card payments for payment plans and the recurring subscription programs.
        - **Charge Tax**: Set to Yes if you want to automatically calculate and charge sales tax for taxable products and subscription programs for all orders.
        - **Merchant Account**: Select your primary account. It will display automatically

on Shopping Cart Themes, Order Forms, and Manual Orders, but can also be customized on a per-item basis.

- **(Optional) Max Retries**: Change this number if you want Infusionsoft to try to process a failed charge more or less than 3 times (system default.)
- **(Optional) Num Days Between Retries**: Change this number if you want Infusionsoft to wait more or less than 2 days (system default) between each retry.
- **(Optional) Show Payment Interface in Orders Tab**: Set to Yes if you want to view a payment history from an Order Record. This turns on a More Payments button with a date range search.
- **(Optional) Days to Wait Before Auto-charging**: This setting delays all pending auto-charges (e.g. If you set this to 3, all pending auto-charges will process 3 days late). It may be useful if you are switching merchant gateways or are resolving an issue with a gateway, but most businesses do not need this setting.
- **Email Invoices Upon Successful Payment**: Set to Yes if you want Infusionsoft to send an invoice each time a manual or automatic payment is posted to Infusionsoft.
- **Reset Failed Auto-charge Attempt Counters When Credit Card Changes**: Set to Yes if you want to zero out the auto-charge counter for a new credit card instead of resuming the count based on failed charges on a previous card. (e.g. The previous card was tried 2 times. If you don't reset, a failure on the new card will be counted as the 3rd try instead of the first.)
- **(Optional) Don't Auto-charge Invoices That Have Been Outstanding For More Than**: Select a time range limit for auto-charge attempts. The system will no longer try to charge the card after this limit is reached. The default is 12 months. You can reduce this to 9, 6, 3, or 1 month.

4. Scroll to the bottom of the settings and click on **Save** to apply the update.

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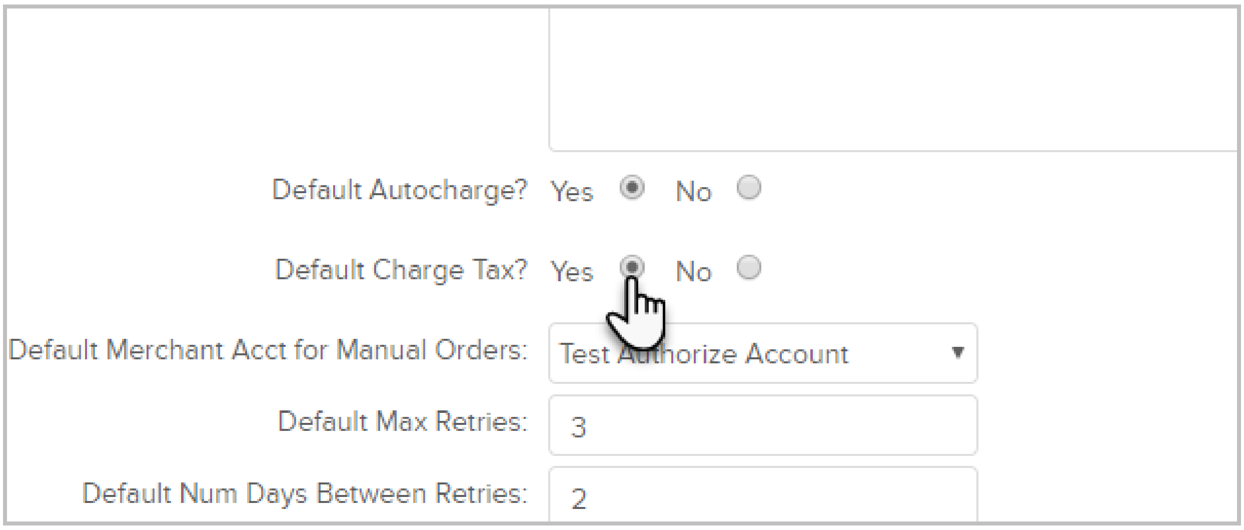
Sales Tax

Last Modified on 08/21/2018 7:42 pm MST

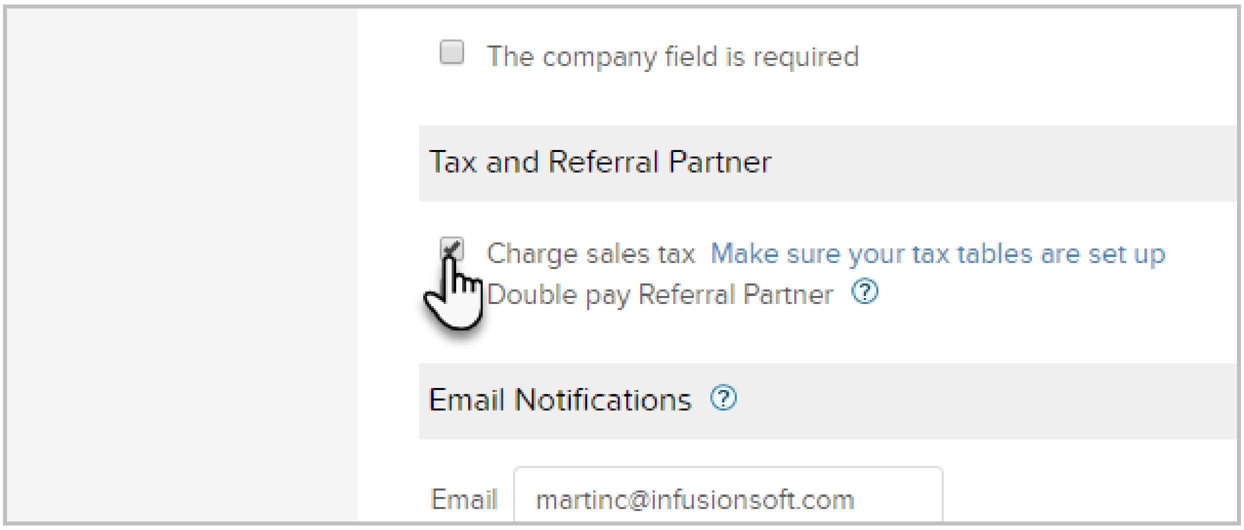
Infusionsoft can automatically calculate and apply sales tax to online and offline orders. You will set up the sales tax rules and then designate individual products and subscriptions as taxable. You can add Country, State, and City types of sales tax. These settings are determined by the tax laws of your country, state, and city. You will need to contact the tax authorities to ask for guidance about which products are taxable and the sales tax percentages.

To Enable Sales Tax by default



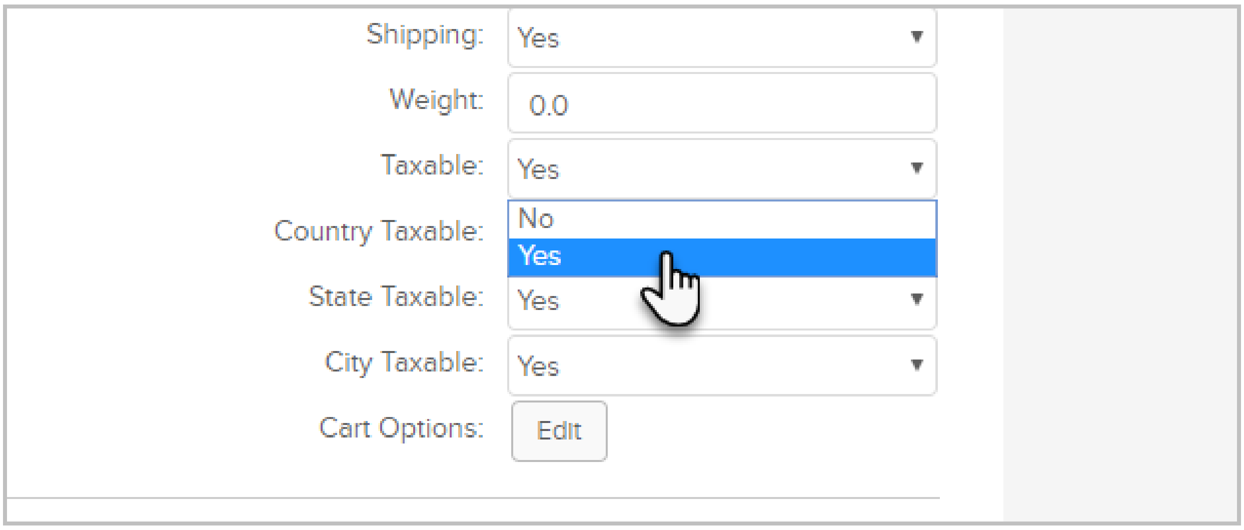
1. Go to **E-Commerce** > **Settings** > **Orders.**
2. Set *Default Charge Tax?* to **Yes**.

Enable Sales Tax in the Shopping Cart & Order Forms



1. Go to **E-Commerce** > **E-Commerce Setup**
2. Click on **Shopping Cart Settings**
3. Check the box to **Charge sales tax**.

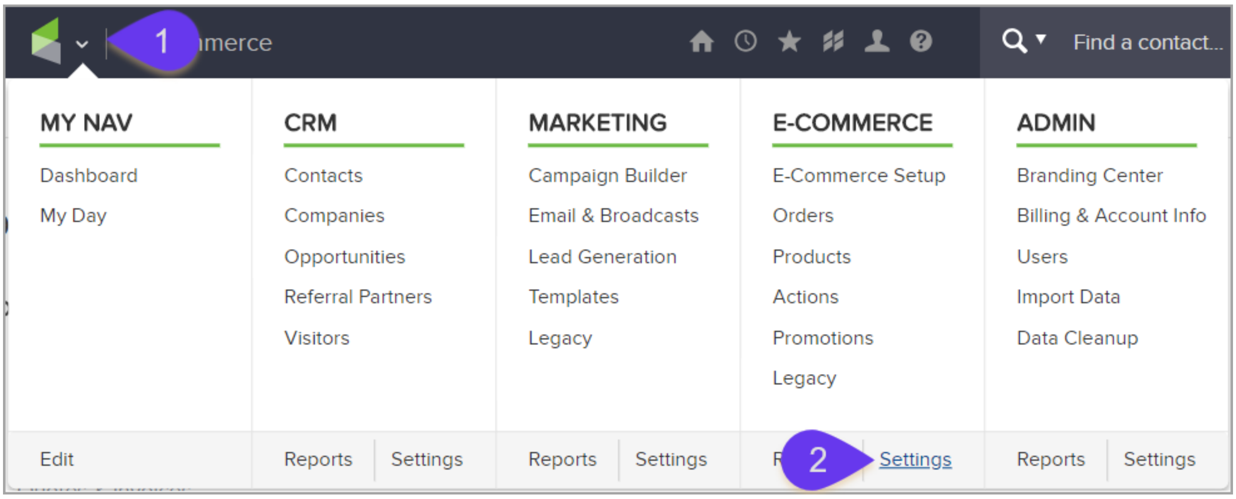
Sales Tax will need to be enabled for each product



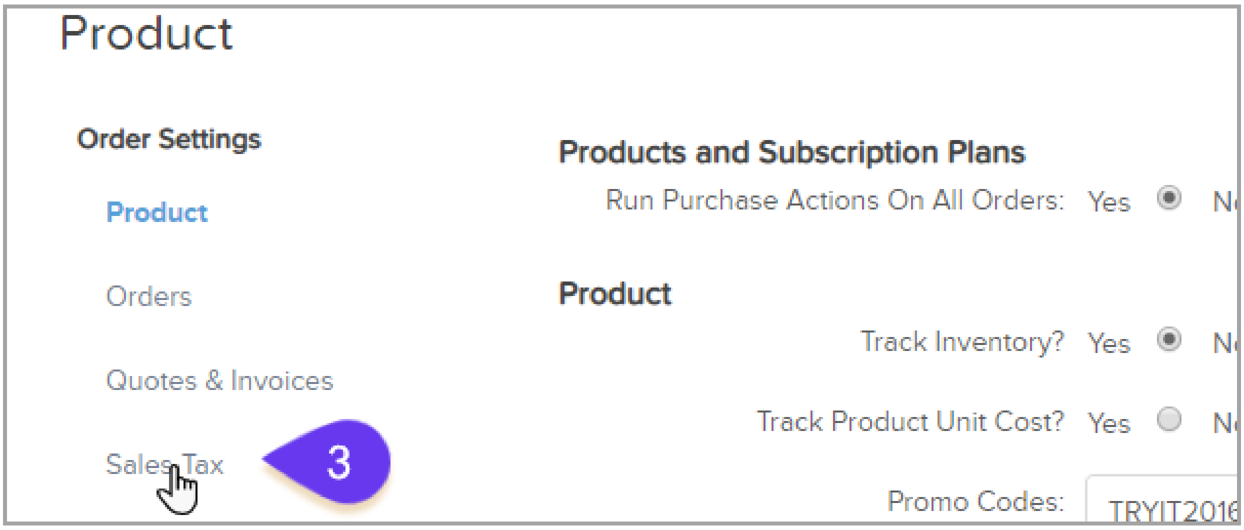
1. Go to **E-Commerce** > **Products**
2. Select a product.
3. Set the *Taxable* drop-down to **Yes**.

Configure the regional tax options on each product.

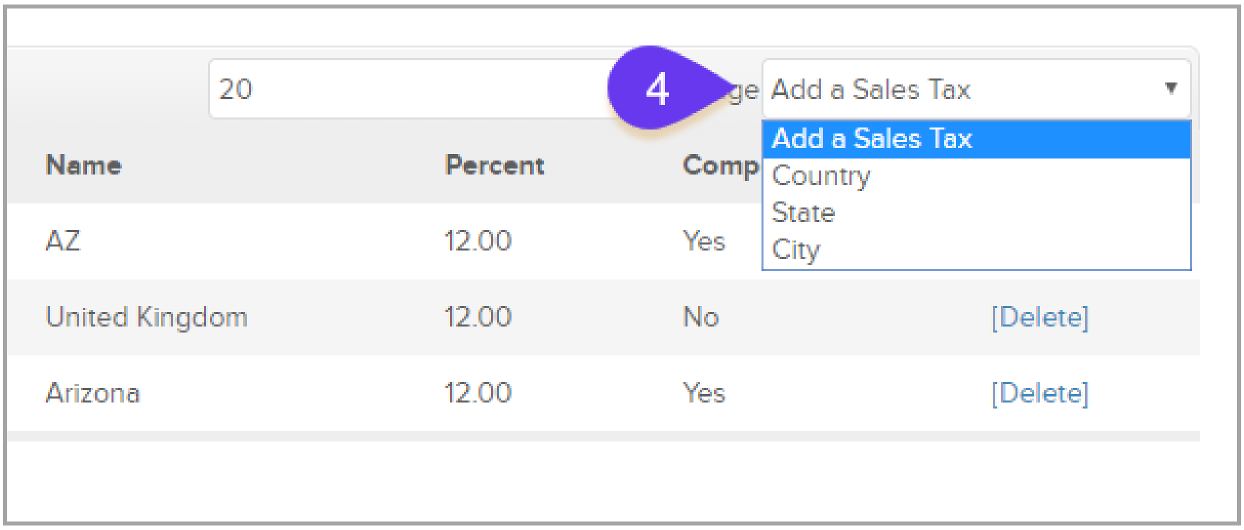
1. Go to **E-Commerce** > **Settings** in the main navigation menu.



2. Click on **Sales Tax** in the settings menu.



3. Select a tax type from the drop down: Country, State, or City. Note: You must add each type of tax individually.



a. **Country**: Select a country from the drop-down and enter the tax percentage for that country.
b. **State**: Enter the state 2 letter abbreviation and the tax percentage for that state. Note: Canadian business can use this field to set up province taxes.
c. (Optional) Compound: Set compound to Yes if you want the country tax applied to the taxable subtotal before the state tax is calculated.
d. **City**: Enter the city name and tax percentage for that city.
e. (Optional) Compound: Set compound to Yes if you want the country and state tax applied to the taxable subtotal before the city tax is calculated
f. Click **Save** to add the new sales tax.

Note! The **Country**, **State**, and **City** names are **case and spelling** sensitive. Meaning that if you have the State Tax setup as "**AZ"** and an order is submitted is "**az**", the tax will not be applied. The same goes for if the order is submitted with "**Arizona"** instead of "**AZ"**.

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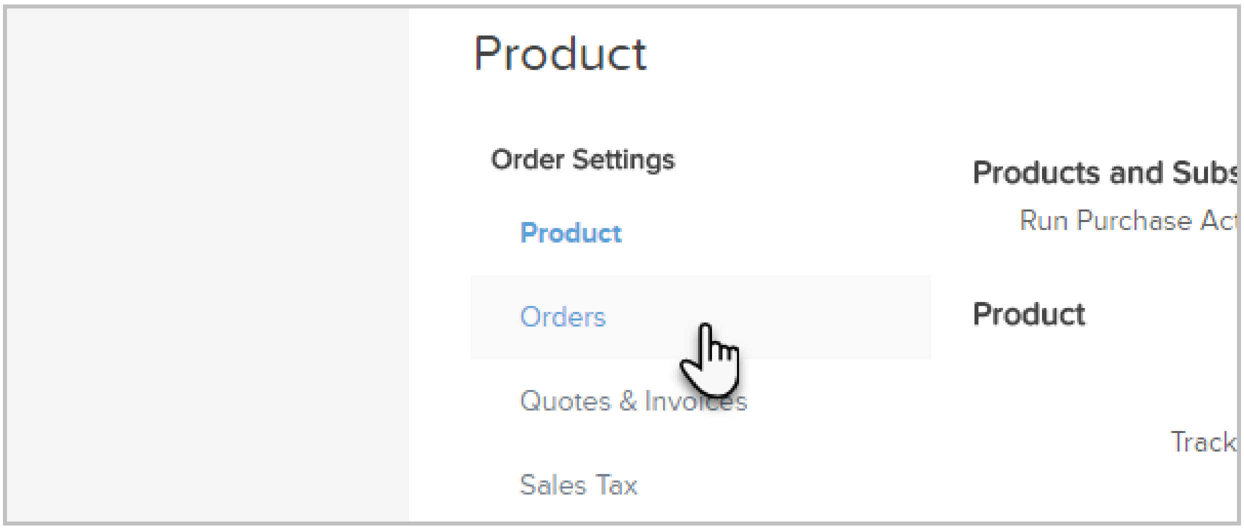
Change The Default Shipping And Billing Country For Online Orders

Last Modified on 07/25/2018 1:30 pm MST

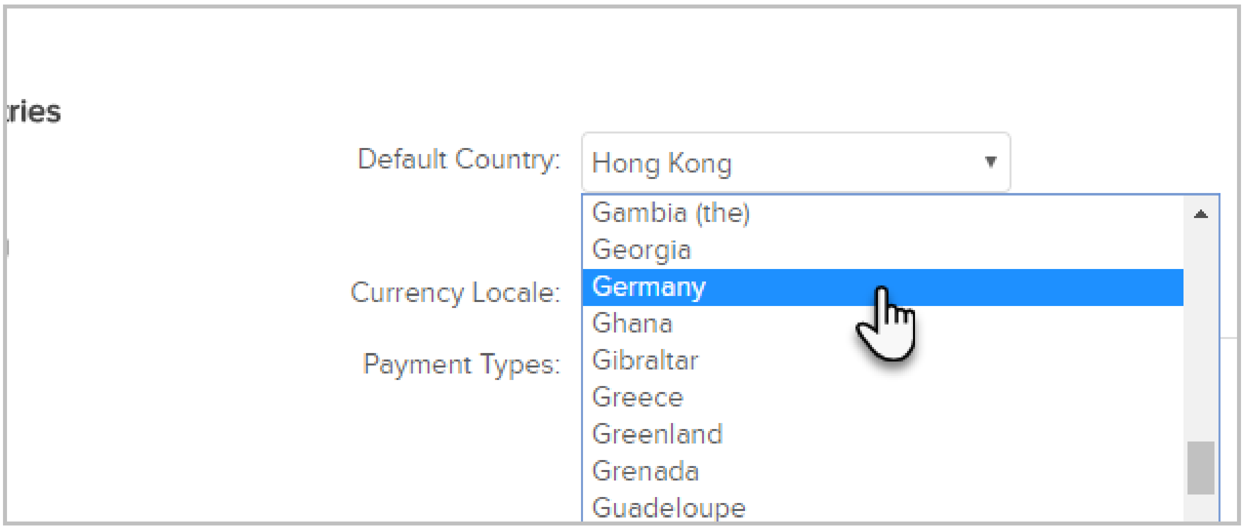
The default country is pre-selected when a customer checks out through your Infusionsoft Shopping Cart or Order Form. You can change the default country in the Order Settings.

1. Go to **E-Commerce** > **Settings** in the master nav.

2. Click on **Orders** in the *Order Settings* menu.



3. Select the **Default Country** from the drop-down.



4. Scroll to the bottom of the settings and click **Save** to apply the update.

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Set Up A Payment Plan

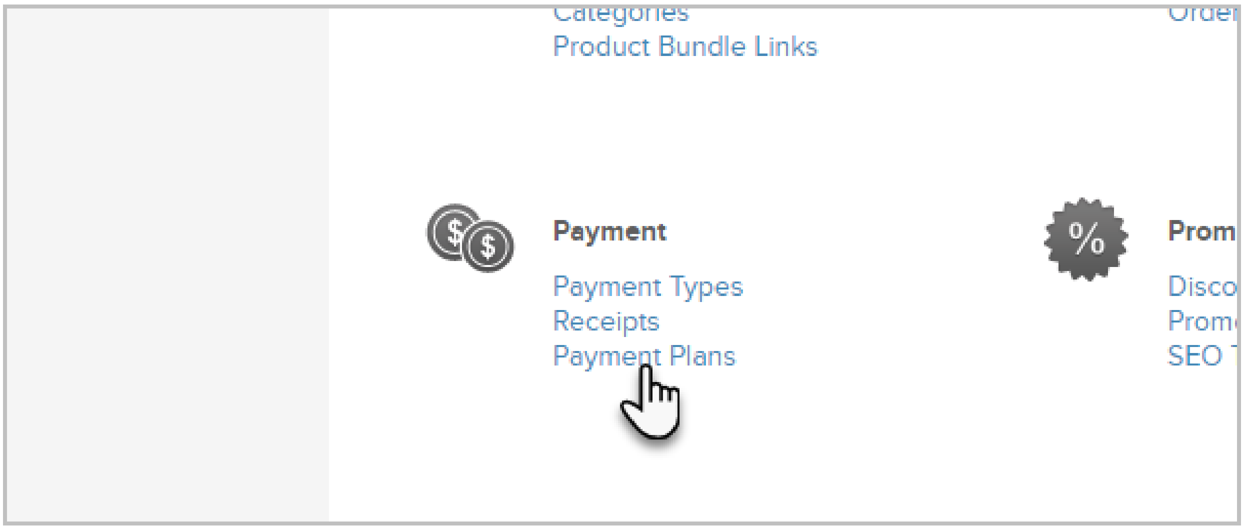
Last Modified on 07/25/2018 1:35 pm MST

You can define the number of installments and number of days between charges. You also have the option to charge a percentage or fixed dollar amount finance charge to each installment. The criteria you define determines when a pay plan is visible in the cart (i.e. a specific product is selected, a minimum order total, etc.)

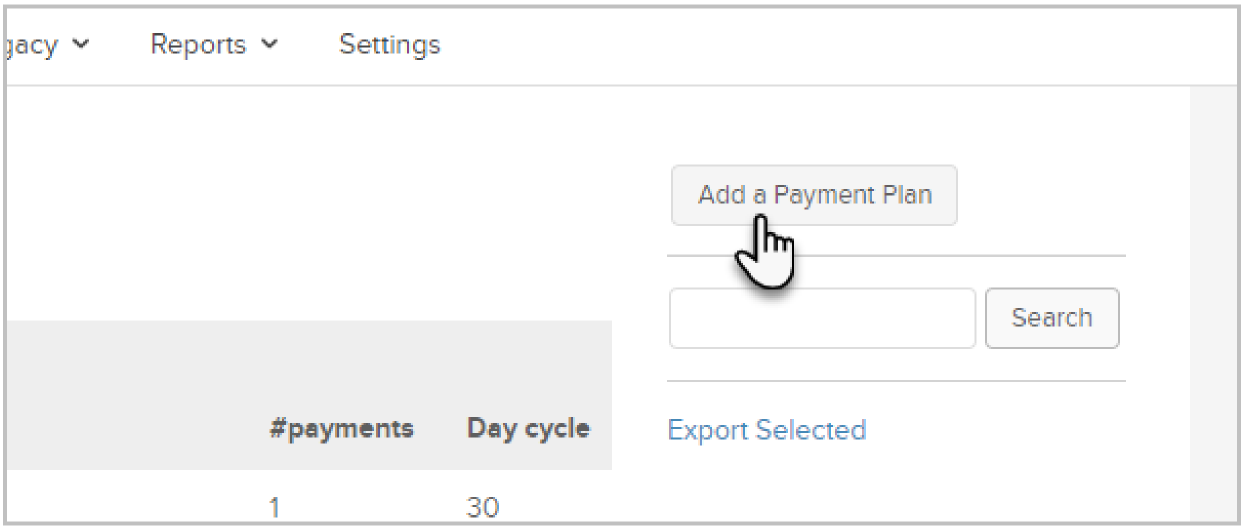
Important Note on Finance Charges: When an order is placed that will payout commissions and the order has a finance charge, the payments will first pay off the finance charge before being applied to the commissions.

1. Go to **E-Commerce > E-Commerce Setup** in the master nav.

2. Click on **Payment Plans** at the bottom left



3. Click on the **Add a Payment Plan** button at the top right of the page



4. Enter the Payment Plan Information
    - **Name**: This name shows up for Infusionsoft users. It should be descriptive of the offer (e.g. 3 pay for the Lil Slugger Batting Cage.)
    - **Description**: The description is also for Infusionsoft users. Make some notes about the pay plan details (i.e. purpose, limitations, etc.)

5. Enter the Finance Charge details.
   Note: The finance charge is displayed in the Infusionsoft shopping cart during the checkout process.
    - **Type**: Select the method of calculation from Percent or fixed dollar Amount.
    - **Amount**: Enter the numerical value for the percent or dollar amount. This amount is applied to the total and divided evenly between payments.

6. Enter the Scheduling details:
    - **Number of Payments**: Enter the total number of payments, including the first payment (e.g. 3 payments)
    - **Days Between Payments**: Enter the number of days between payments (e.g. 30 days will charge an installment about once a month.)
    - **Days Until Start**: Leave this set to zero to charge the first installment upon checkout. If you enter a number, the system will not charge the first installment right away but will delay it by the specified number of days. You can use this to set up a "free trial" period or to charge in arrears, after services have already been rendered.

7. Set up the Options
    - **Merchant Account**: The system will use the default Merchant Account, but you can select a different one.
    - (Optional) **Override Cart Merchant Account**: Set to Yes if you selected a different Merchant Account from the drop-down. Skip it if you didn't.

- (Optional) **Auto Charge Payment Plan**: Set this to No if you want to manually charge each installment of the payment plan instead of auto-charging it based on the Pay Plan schedule.
- **Days between Recharge Attempts**: This setting applies to autocharge failures. Enter the number of days you want Infusionsoft to wait before trying to charge the card again if an autocharge fails.
- **Max Retries**: This setting also applies to auto-charge failures. Enter the maximum number of times the system will try to charge a card before it gives up. Note: You can set up billing automation to alert you when this happens.

8. Click **Save**.

9. Scroll to the bottom and choose the criteria that must be met in order for the Payment Plan to be present. These criteria define one or more conditions that must be true for the payment plan to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the payment plan.

10. Enter the specific parameters for the criteria you chose.

11. Click **Save** to save the criteria.

12. Click **Save** to save the payment plan.

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Set Up Automation When An Autocharge Fails Or Is Successful

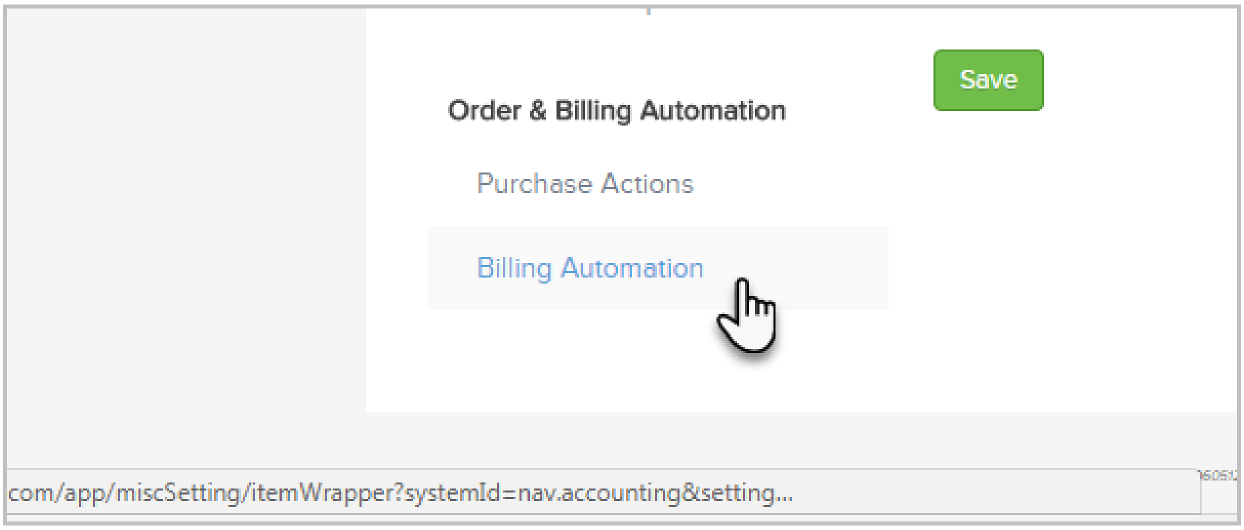
Last Modified on 07/25/2018 1:37 pm MST

Infusionsoft automatically charges a credit card when a customer makes a one-time purchase and elects to pay in multiple installments (payment plan) or when they purchase a subscription program that involves recurring billing. If a customer closes a credit card account or has other issues with their card, the auto-charges will not process. When this happens, you will not be able to collect the funds until the problem is resolved. You can set up billing automation that will alert both you and the customer that there is an issue.

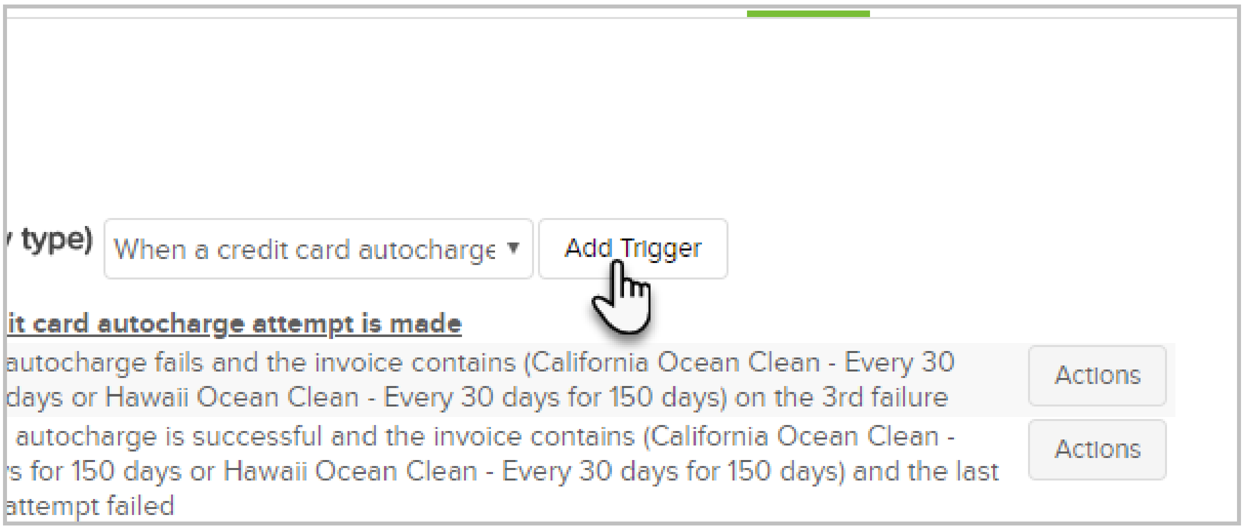
> **PayPal Transactions:** Please note that orders and subscriptions that are paid with PayPal, will not trigger Billing Automation.

1. Go to **E-Commerce** > **Settings**

2. Click on **Billing Automation** in the *Settings* menu at the bottom-left of the page

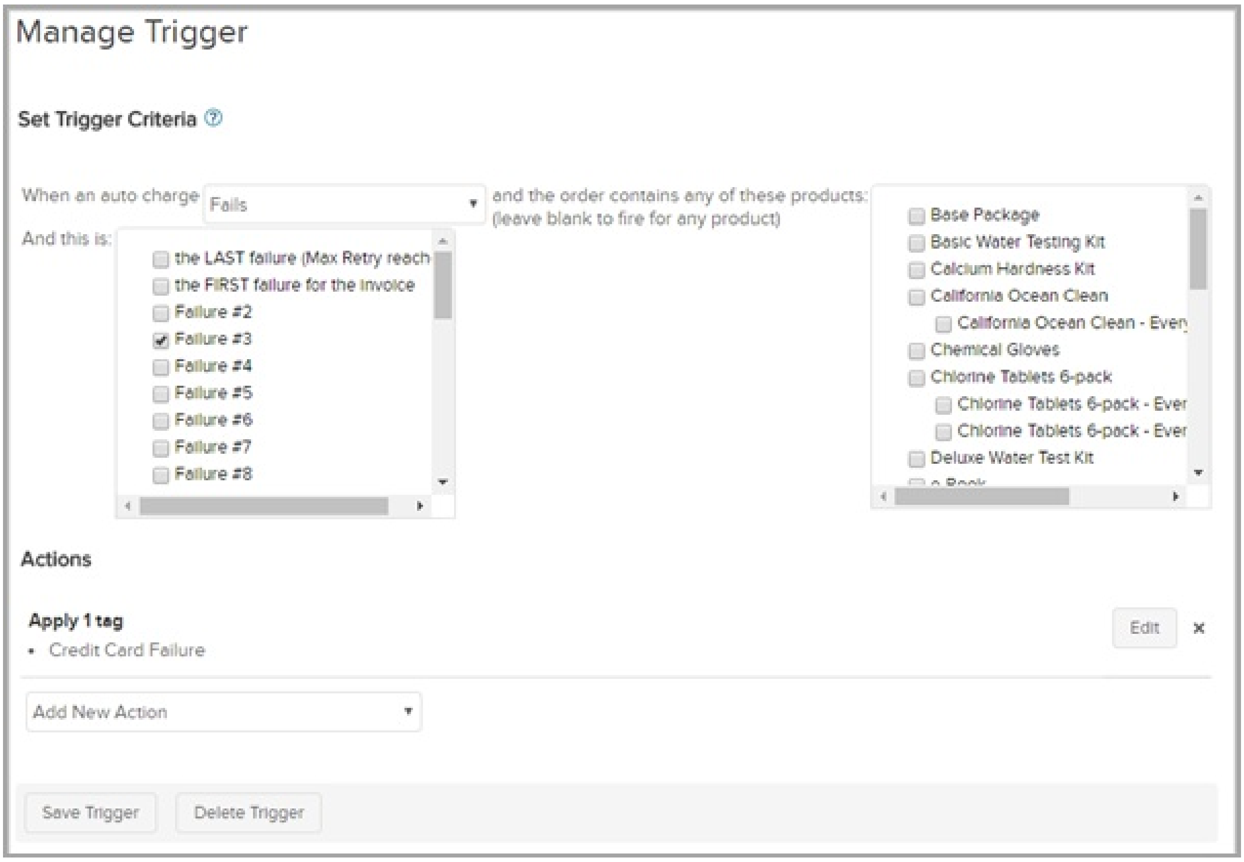


3. **Choose a trigger type** from the drop-down and click on the **Add Trigger** button.



4. Set the Trigger Criteria.
    1. Select an autocharge event from the drop-down: **Fails** or **Is Successful**.
    2. (Optional) Select specific products. If you do not set a product criteria, the trigger will apply to all products and subscription programs.
        1. Select the Fail or Success criteria.
        2. Failure Criteria
        3. Success Criteria

5. Add Actions. In this example, a tag "Credit Card Failure" is applied to the contact on the third failed autocharge attempt. You could then initiate a campaign when that tag is applied .



6. Click on the **Save Trigger** button.

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Set Up Automation Based On Credit Card Expiration Date

Last Modified on 07/25/2018 1:36 pm MST

You can set up billing triggers that help you proactively communicate with a customer when their card is about to expire. This type of follow up will reduce auto-charge failures due to expired credit cards.

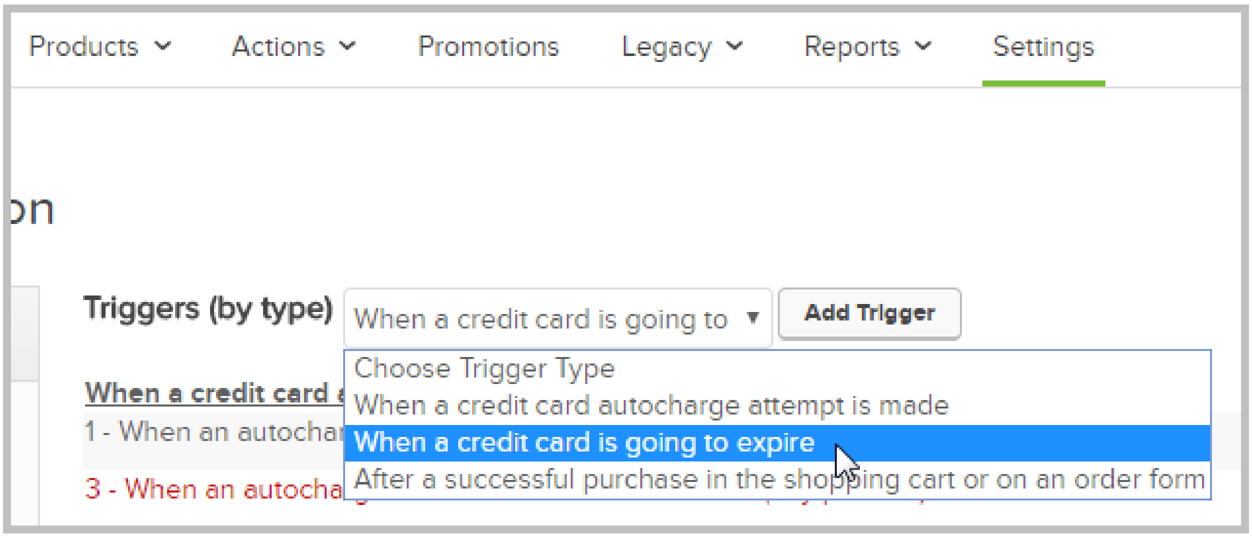
Expiration Trigger Timing: The billing automation triggers work off of the last day of the month for the month in which the card is set to expire. For example, if you set the trigger to activate 10 days prior to expiration, and the card expires 2/2020, the trigger will activate on 2/19/2020 – 10 days prior to the end of the month in which the card expires.

PayPal Transactions: Please note that orders and subscriptions that are paid with PayPal, will not trigger Billing Automation.

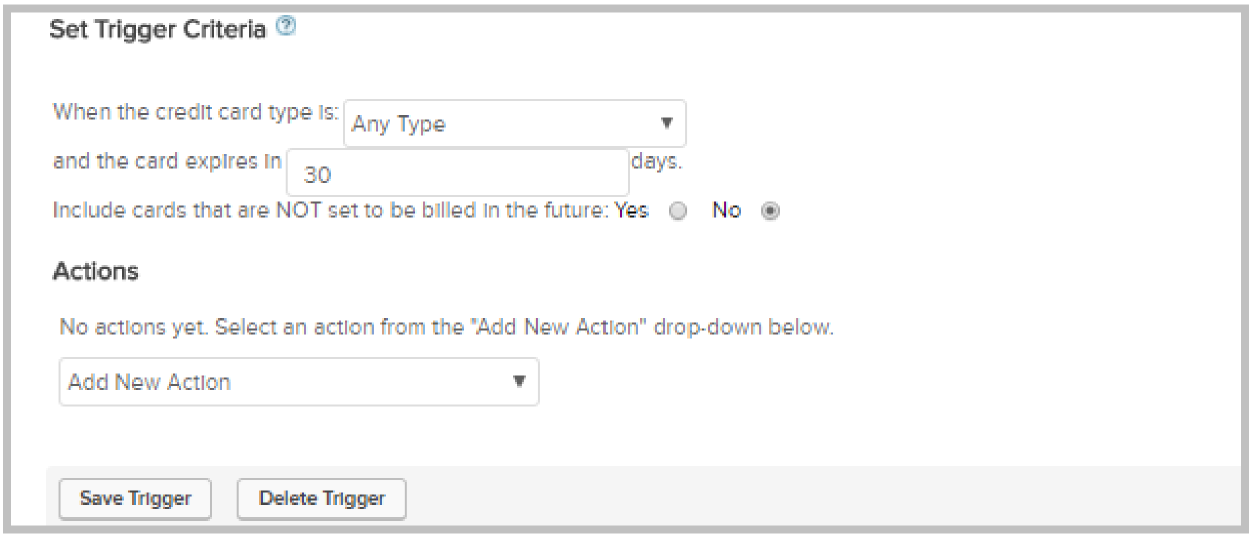
1. Go to **E-Commerce** > **Settings** in the master nav.

2. Click on **Billing Automation** in the *Settings* menu.

3. Select *When a credit card is going to expire* from the drop down and click on the **Add Trigger** button.



4. Set the Trigger Criteria.



   1. Select the card type from the drop down. The default is *Any Type*.

   2. Enter the days before expiration. This will allow you to schedule follow up based on the card expiration date.

   3. Choose cards to include based on auto-charge status. The default setting is *No*, meaning only the customers whose cards have future charges will receive follow up. Set this to *Yes* if you want this automation to apply to ALL of your customers; even those who do not have active subscription billing.

5. Add Actions **Example Actions.** A couple of typical actions would be:
   - Send a task to someone in your company to reach out to the customer
   - Send the customer an email reminder to update their card.
   - Add a tag

6. Click **Save Trigger**.

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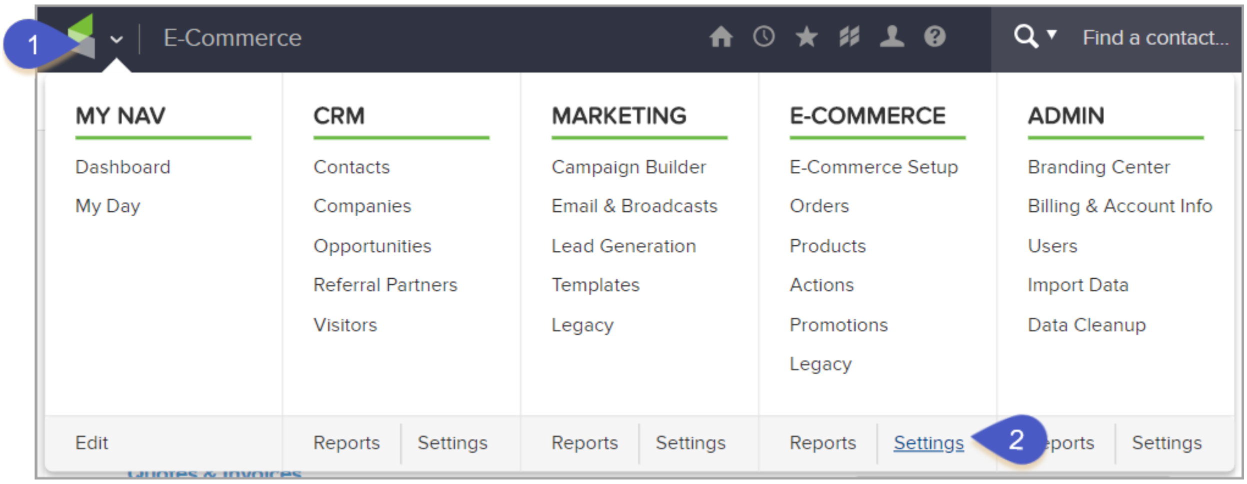
Create A Billing Reminder With Merged Credit Card Information

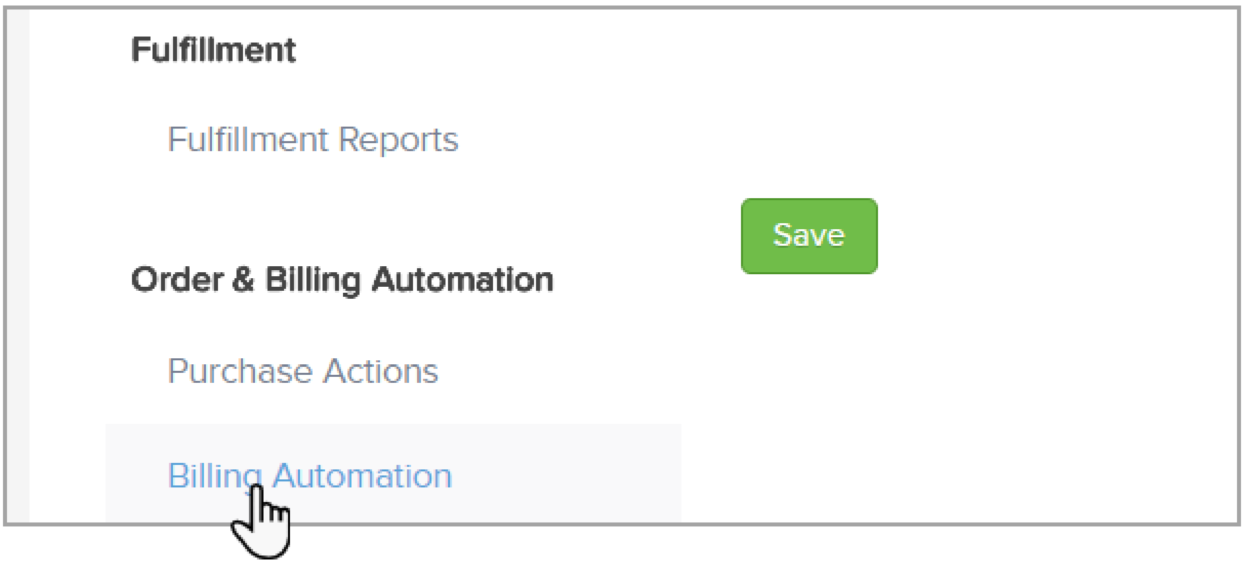
Last Modified on 07/25/2018 1:37 pm MST

You can send an email reminder that a credit card is about to expire. You can only access credit card merge fields when you create emails through the Billing Automatons.

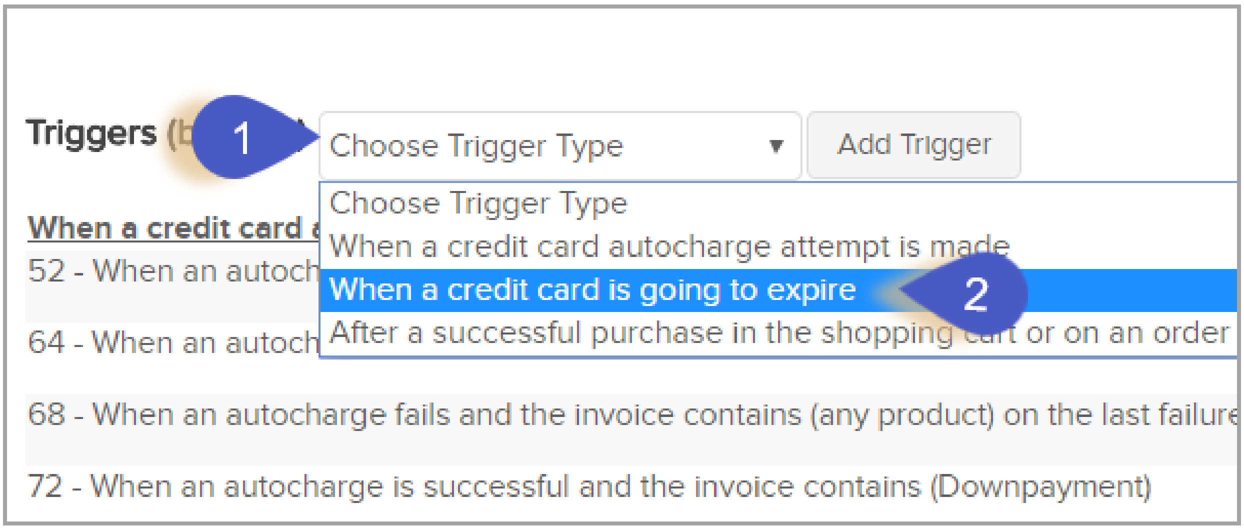
1. Go to **E-Commerce > Settings**

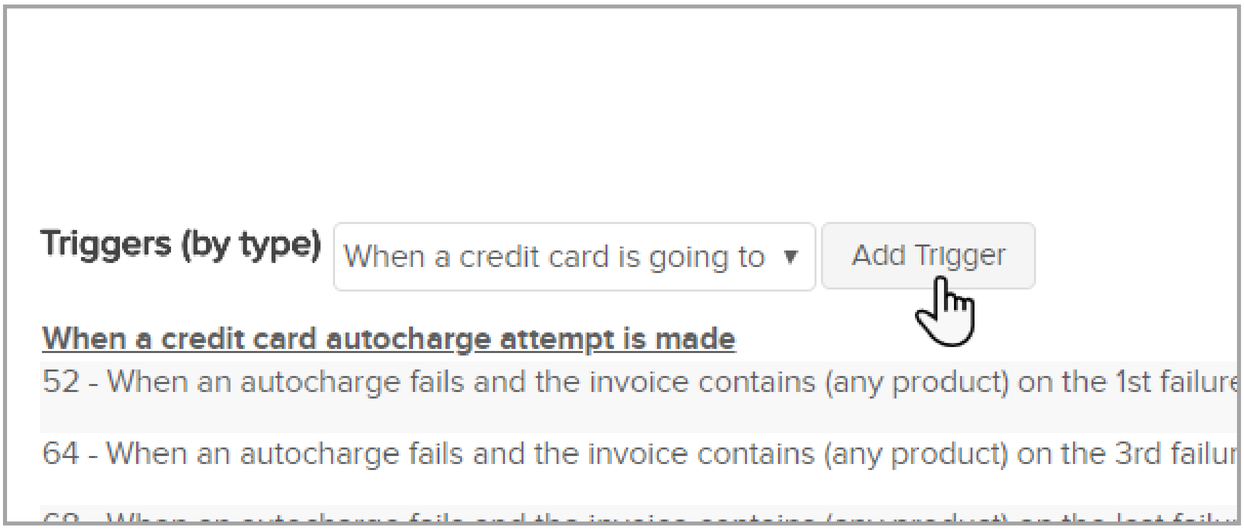


2. Click on **Billing Automation** in the *settings* menu.

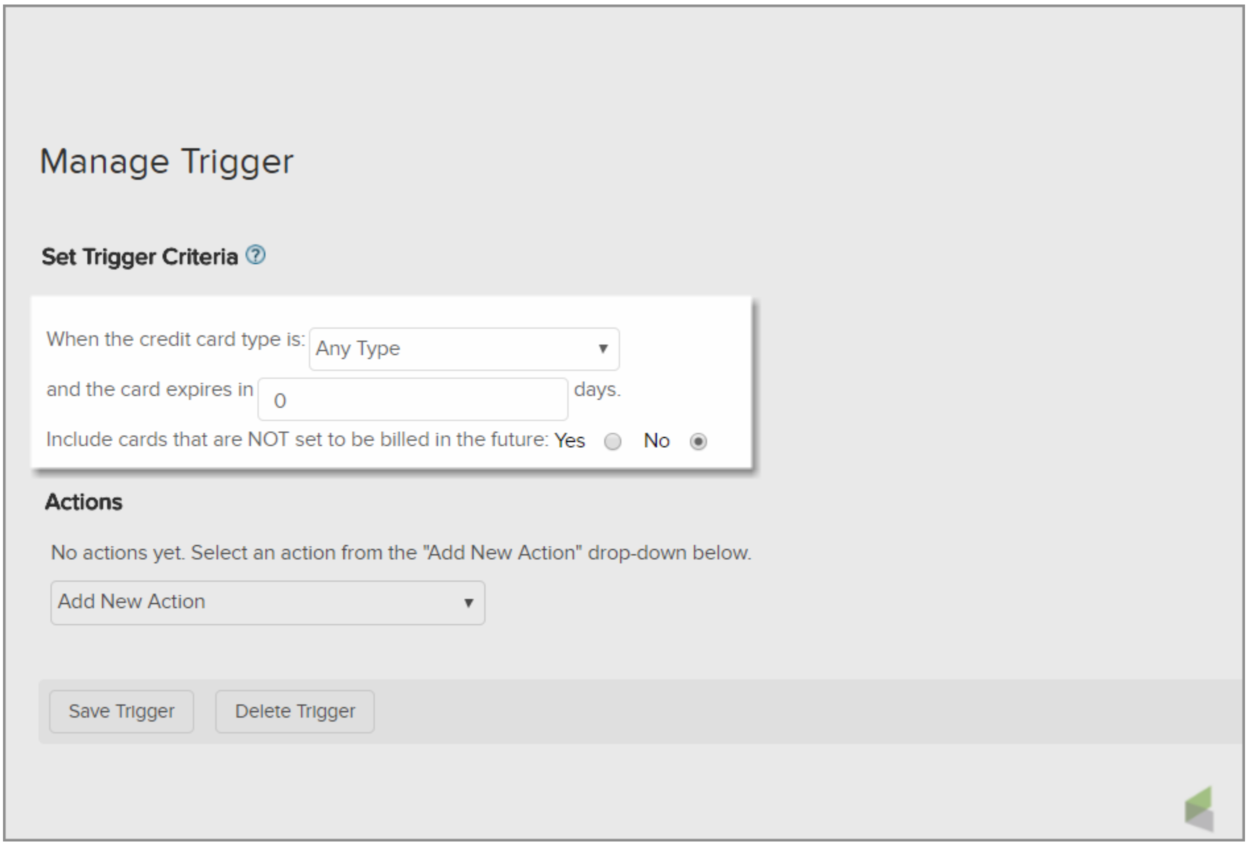


3. Select "**When a Credit Card is going to expire**" and click "**Add Trigger**"

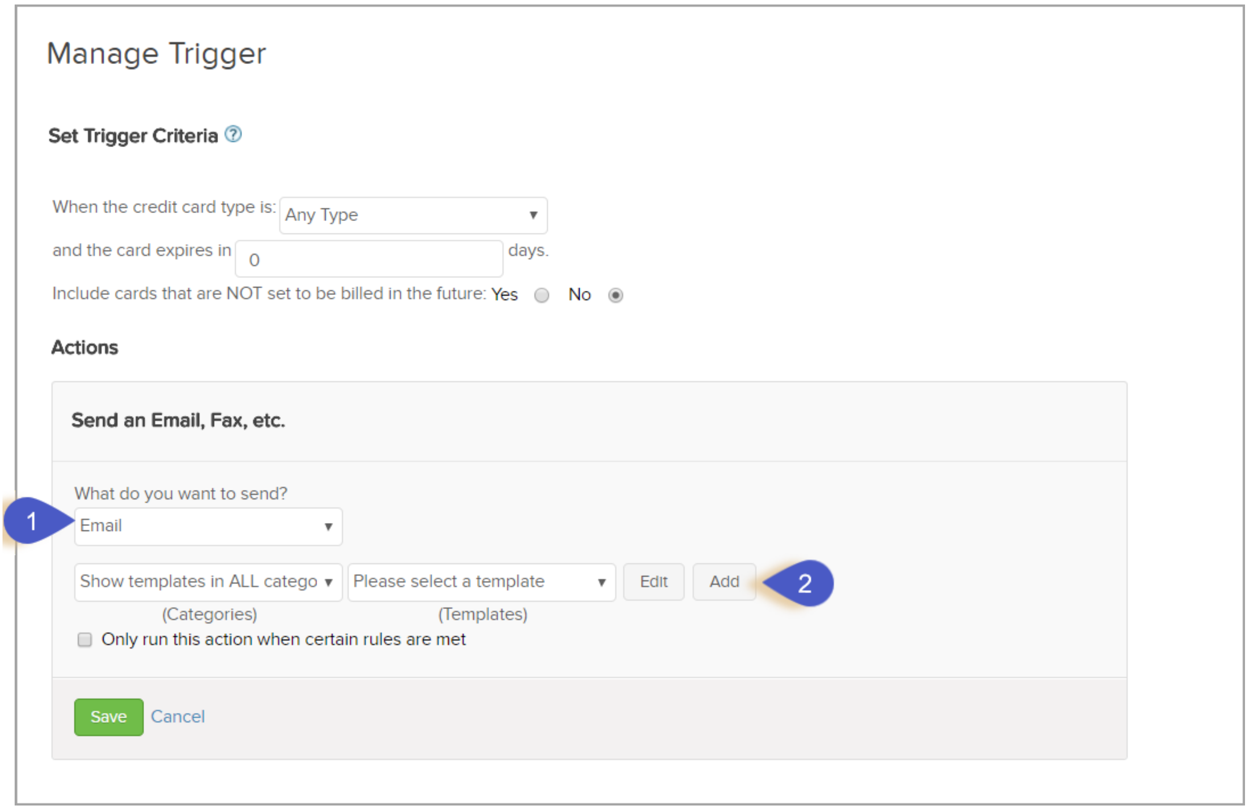




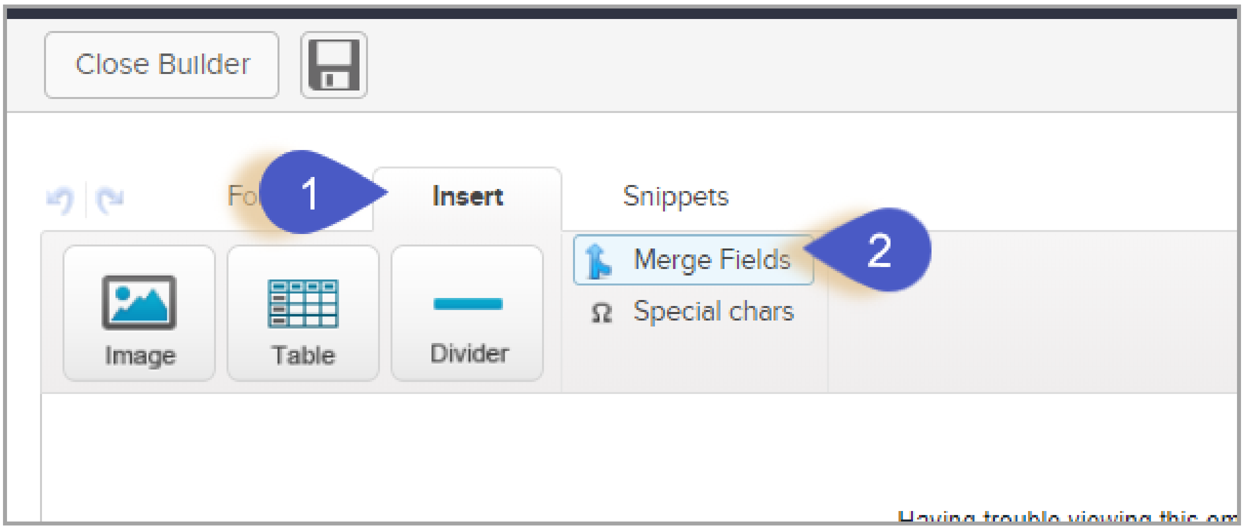
4. After you set up the criteria for an order trigger, you will add actions. Select **Sends an Email**, **Fax**, etc. from the action drop-down.



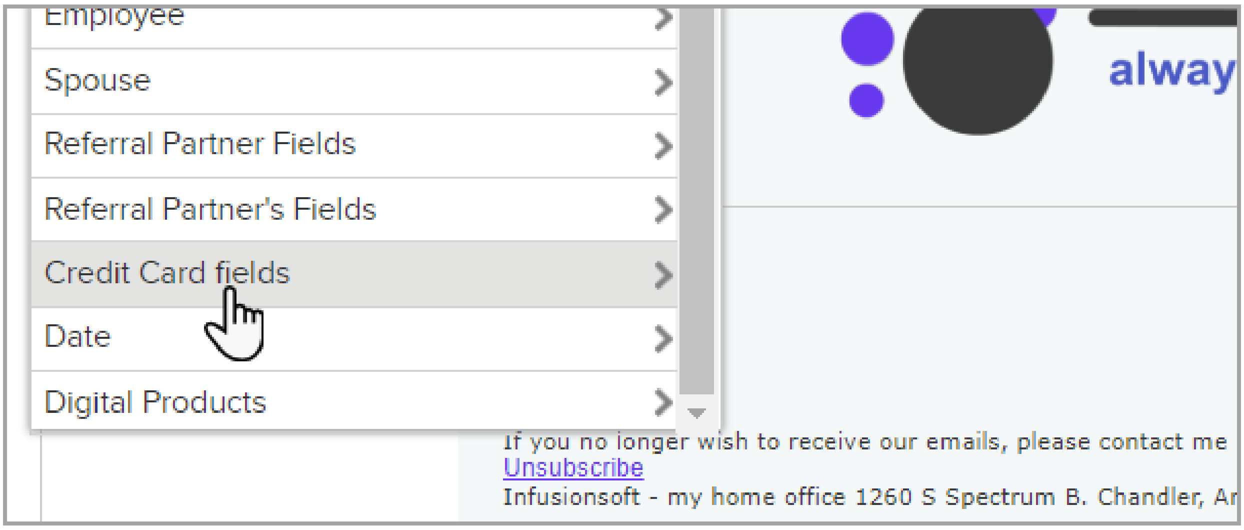
5. Select **Email** from the type drop-down and click on **Add**



6. Create the Email Template, inserting the credit card merge fields where appropriate. While editing the email body, click the **Insert** tab to access your merge fields. From the merge field selections, you will find **Credit Card Fields** near the bottom of the list.



Close Builder
Insert
Snippets
1
2
Merge Fields
Special chars
Image
Table
Divider



Spouse
Referral Partner Fields
Referral Partner's Fields
Credit Card fields
Date
Digital Products
If you no longer wish to receive our emails, please contact me
Unsubscribe
Infusionsoft - my home office 1260 S Spectrum B. Chandler, Ar

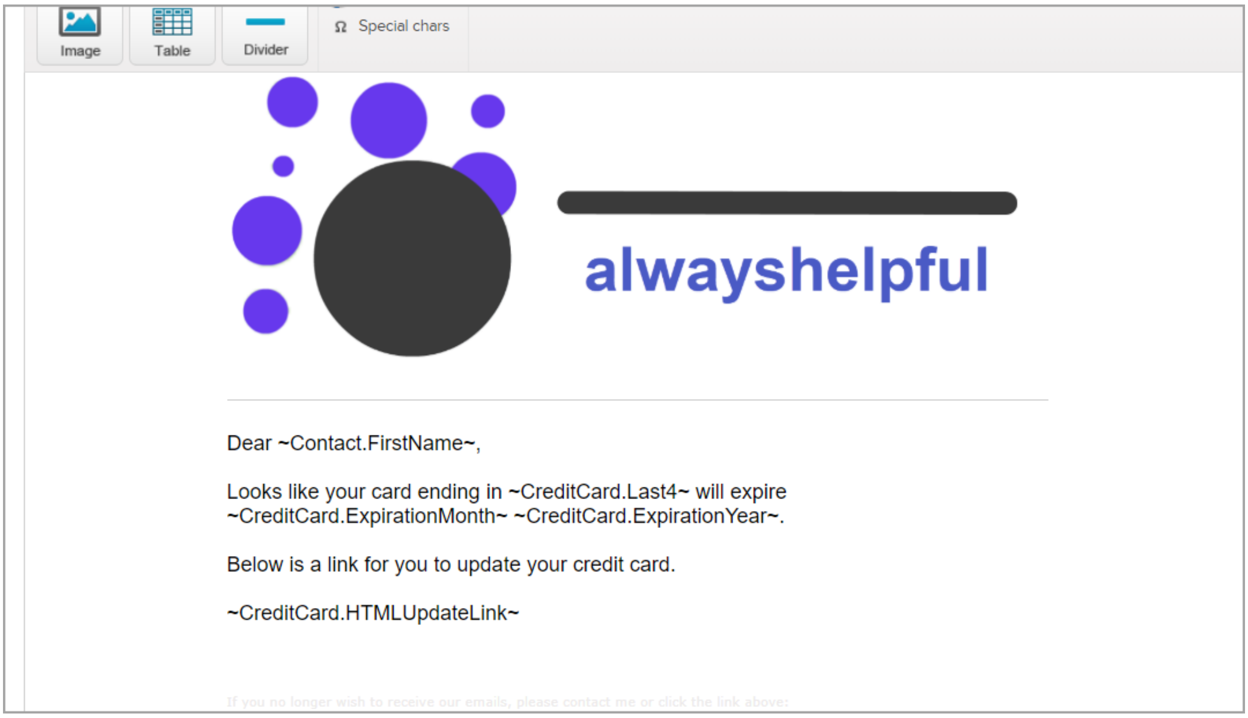
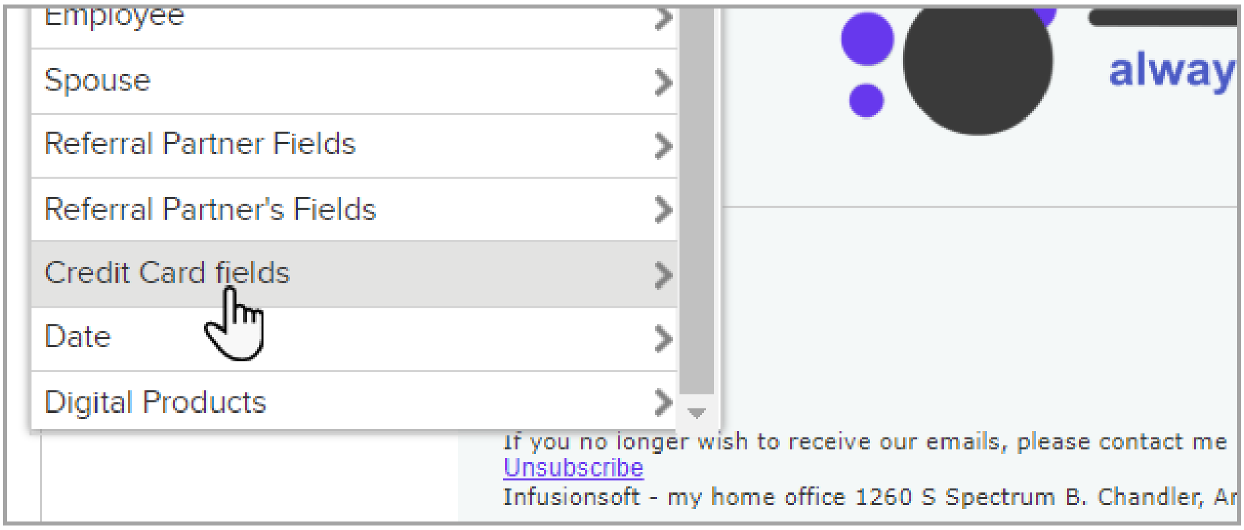


Image
Table
Divider
Special chars
alwayshelpful
Dear ~Contact.FirstName~,
Looks like your card ending in ~CreditCard.Last4~ will expire ~CreditCard.ExpirationMonth~ ~CreditCard.ExpirationYear~.
Below is a link for you to update your credit card.
~CreditCard.HTMLUpdateLink~

7. **Save** the email template.



8. **Save** the action and then click on **Save Trigger**.

Using a different version of Infusionsoft? Click Here to learn more

How Your Customers Update Their Credit Cards

Last Modified on 07/25/2018 1:38 pm MST

The Infusionsoft E-Commerce module includes a secure portal your customers can use to update their credit card information online. The credit card update merge fields are available when you create billing related email templates through **E-Commerce** > **Settings** > **Order Settings** > **Billing Automation**. The credit card merge fields only work if the email is initiated from an order trigger.

1. Go to **E-Commerce** > **Settings**
2. Click on **Billing Automation** in the **settings** menu.
3. Select an **Order Trigger** type from the drop-down and then click on **Add Trigger** to set the Trigger criteria.
4. Select the **Send an Email** Action from the drop-down and click on **Add** to create a new email.
5. Click on **Merge** to add the credit card merge fields to a Plain Text, Drag & Drop, or Classic email. Make sure you include the credit card update link in the email.
6. Finish and **Save** the email, then **Save** the action and **Save** the trigger.

   Don't Forget the Actions! You need to assign actions to alert you when a customer submits a credit card update. The system does not automatically switch billing to the new card. You must manually change the credit card for orders and subscriptions. However, the update process can be automated with the help of a third-party service, like CustomerHub.

7. Go to the *Credit Card* section in **E-commerce>Settings>Orders** to customize the page appearance and assign Actions that fire off when someone clicks on the update link in an email or fills out the form.

Using a different version of Infusionsoft? Click Here to learn more

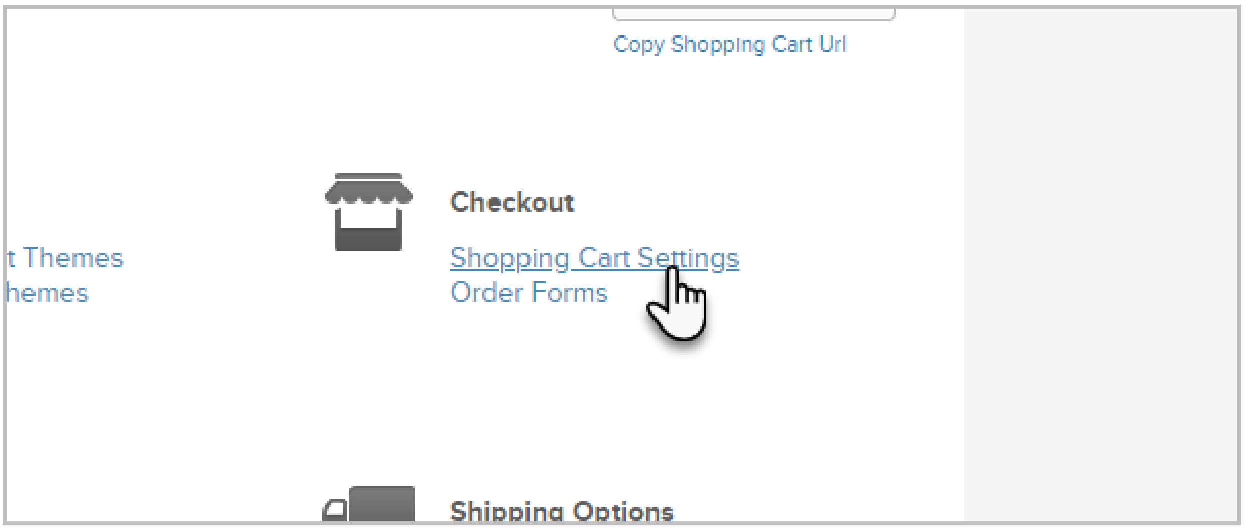
Send Yourself An Order Notification Email

Last Modified on 07/25/2018 1:39 pm MST

You can receive an order notification email for each shopping cart purchase and customize a few other Shopping Cart settings.

1. Go to **E-Commerce** > **E-Commerce Setup** in the master nav.

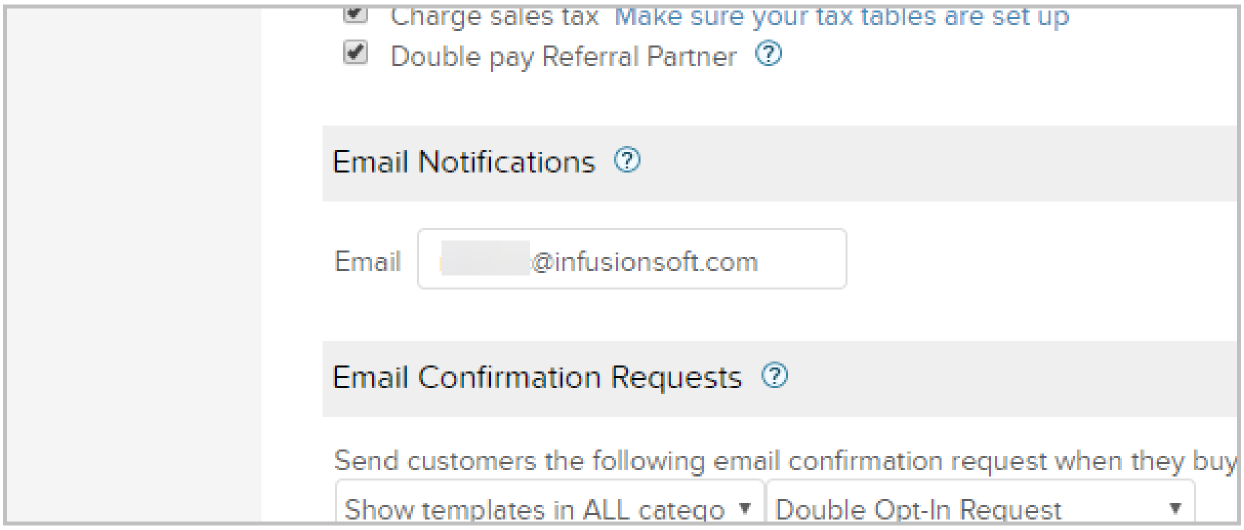
2. Click on the **Shopping Cart Settings** link at the top right.



3. Checkout Settings
    - Select the cart type: multi-step or single-step
    - Default Country: Select your primary country from the drop-down. This country will display by default when a customer enters their information during checkout, but they can select a different country during checkout.
    - International shipping rates will apply to orders from countries outside of this one.
    - (Optional) The company field is required: Mark this checkbox if you want all customers to enter a company name during checkout.

4. Tax and Referral Partner Settings
    - Charge Sales Tax: Mark this checkbox to add sales tax to shopping cart orders.
    - (Optional) Double pay referral partners: Set to Yes if you want to pay the referring partner the lead and the sale commission, instead of just the sale commission.

5. Email Notifications
   Enter an email address if you want Infusionsoft to send a notification email for each shopping cart order. Note: You can only add one email address in the email notification field.



6. Email Confirmation Requests
   If you haven't created the email yet, go to **Marketing** > **Templates** to create it. *Note: This email will only go to the customers who have never clicked to confirm their permission in the past.*

7. (Optional) Pay Per Click Tracking
   Enter your the PPC tracking code from your PPC service provider (e.g. Google, Yahoo, MSN.)

8. **Save** the settings.

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When E-commerce Actions Run

Last Modified on 07/25/2018 1:45 pm MST

Guest Author:

Christian Wiles
Infusionsoft Certified Consultant and Developer
Automate Today, LLC

There are a lot of automation options when working with the E-Commerce portion of Infusionsoft. Sometimes it is tough to find out when certain actions will actually run. This guide, prepared by Infusionsoft Partner, Christian Wiles, shows us the criteria necessary for an action to run.

Pro Tip! The following results require the *Run Purchase Actions on All Orders* option to be set to **Yes**. You can find this setting by going to **E-commerce > Settings > Order**.

Transaction > Payment Process Type		Infusionsoft Automation Trigger			
	Product/Sub	Credit Card Autocharge Attempt (Billing automation)	Product Specific Purchase Action	Global Purchase Actions	Purchase Online Campaign Goal
Product From Order Form/Shopping Cart	Prod	Y	Y	Y	Y
Initial Subscription From Order	Sub	Y	Y	Y	Y

Transaction > Payment Process Type Form/Shopping Cart		Infusionsoft Automation Trigger			
Manual - Add Order - Add Payment - Charge Credit - Card Now	Prod	Y	Y	N	Y
Manual - Add Subscription - Autocharge Credit Card - Invoice Button	Sub	Y	Y	N	Y
Manual - Add Subscription - Allow Cron to Charge Card	Sub	Y	Y	N	Y
Legacy Action - Add Order - Product	Prod	Y	Y	N	Y
Legacy Action - Add Order - Subscription - 1st Iteration	Sub	Y	Y	N	Y
Recurring Order Credit Card Payment AFTER Initial Order	Sub	Y	N	N	N
Product w/ Pay Plan from Cart w/ Balance Due - Initial	Prod	Y	Y	Y	Y
Manual Order with Pay Plan and Remaining Balance	Prod	Y	Y	N	N
Any Order with Pay Plan and Payoff Balance	Prod	Y	Y	N	N

Transaction > Payment Process Type		Infusionsoft Automation Trigger			
Manual Process of Recurring Order Payment AFTER Initial Order - Add Payment - Credit Card Now	Sub	Y	N	N	N
Manual Process of Recurring Order Payment AFTER Initial Order - Add Payment - Manual	Sub	N	N	N	N
Manual Order - Add Order - Add Payment - No Card Processed (CC Manual, Cash, Check, etc)	Prod	N	Y	N	N
Manual Order - Add Subscription - Add Payment - No Card Processed (CC Manual, Cash, Check, etc)	Sub	N	Y	N	N
Invoices charged by API service Invoice.chargeInvoice	Prod	Y	Y	N	Y
Invoices charged by API service Invoice.chargeInvoice - Initial invoice as recurring	Sub	Y	Y	N	Y
Orders created and charged through **API service** OrderService.placeOrder	Prod	Y	Y	Y	Y
Subscription Orders created and charged through **API service** OrderService.placeOrder	Sub	Y	Y	Y	Y
Add a manual Payment using the					

API service Type

Infusionsoft Automation Trigger

Transaction > Payment Process InvoiceService.addManualPayment	Prod	N	Y	N	N

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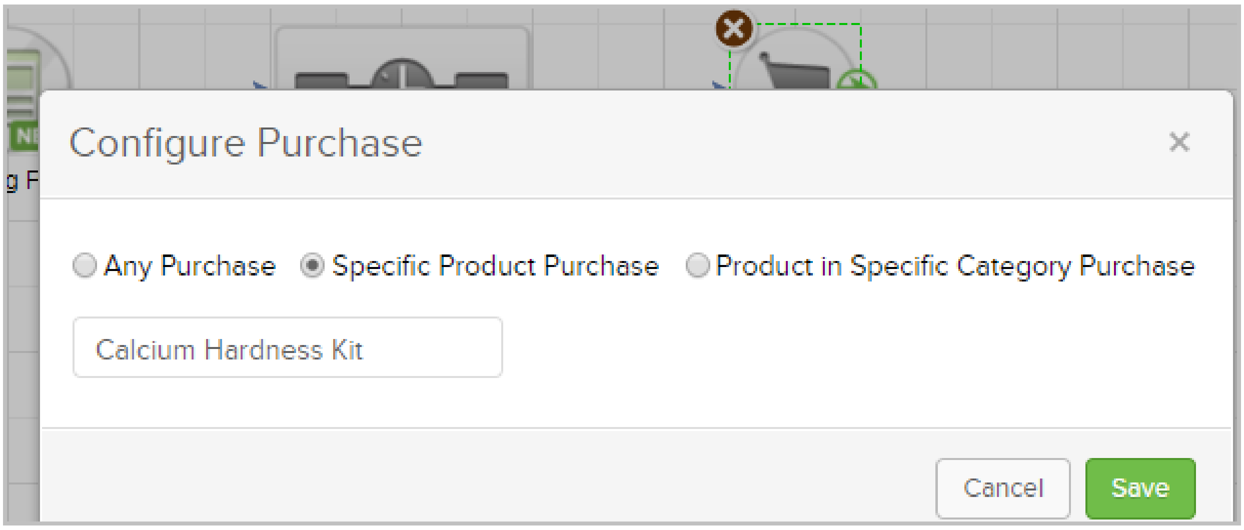
Automate Follow Up on Failed and Error Purchases

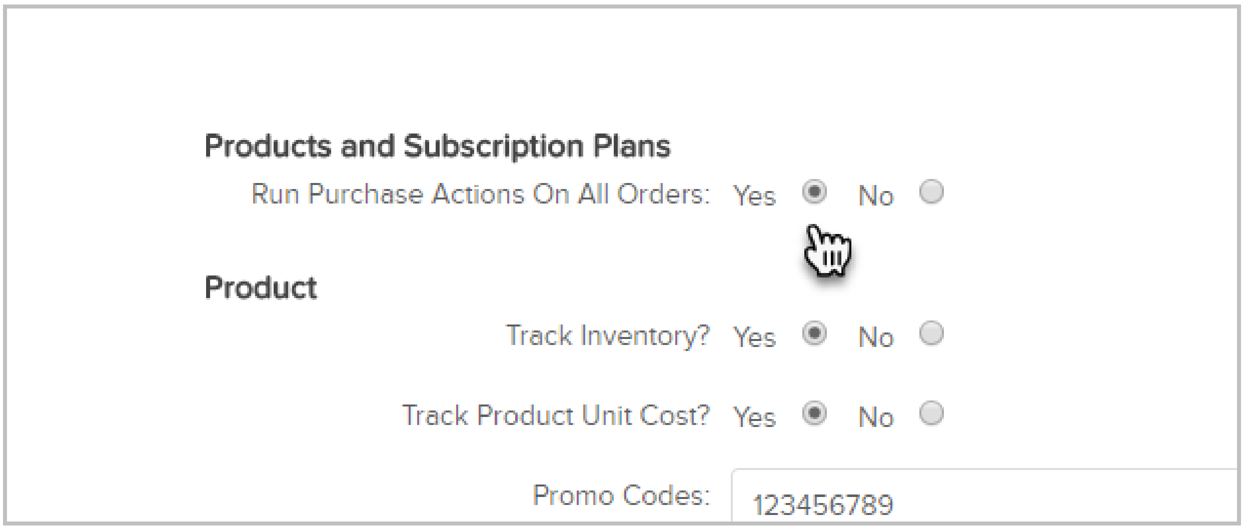
Last Modified on 08/01/2018 3:01 pm MST

"Purchase Actions" are completely optional. A purchase action that runs when a specific item has been purchased is now incorporated directly in the campaign builder. So "Successful Purchase Action", "Contact Creation Action" or "Product-Specific Purchase Actions" may not be very useful to you.



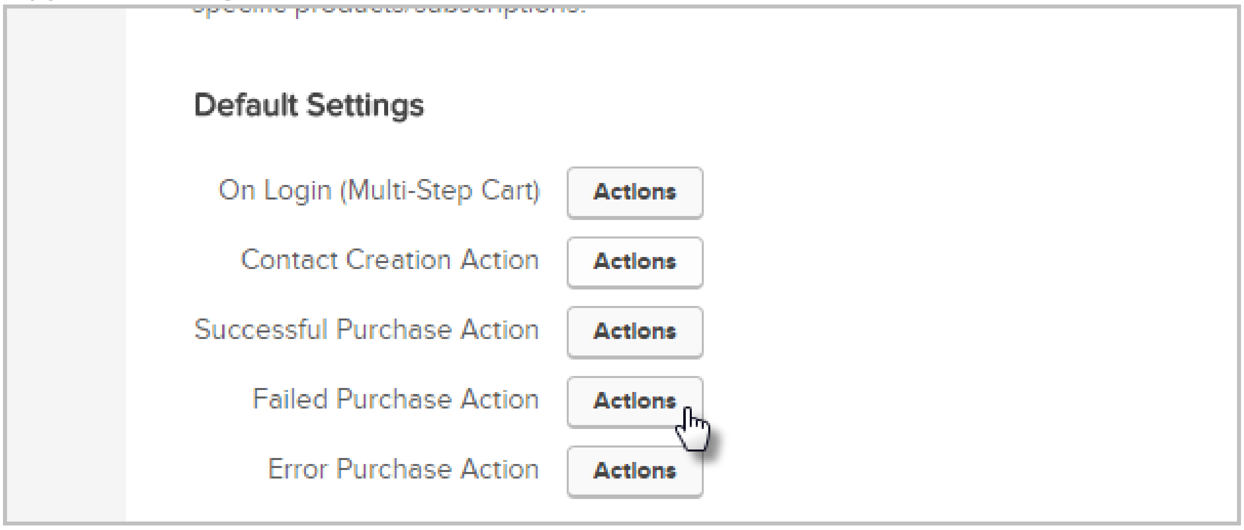
However, the ability to run an action on a "Failed" or "Error" Purchase is still very useful. This will allow you to send an email after a purchase has failed or errored. The email you send can be an apology and your contact information so they can reach you. You may also include an action that sends you a task or email notification so you can follow up with the customer.

By default, purchase actions trigger when someone purchases through the shopping cart and order forms. Purchase actions will also trigger for legacy order form purchases and manual orders if you have a product specific action set up and you have this option enabled under **E-Commerce** > **Settings** > **Products** section.



1. Go to **E-Commerce** > **Actions**

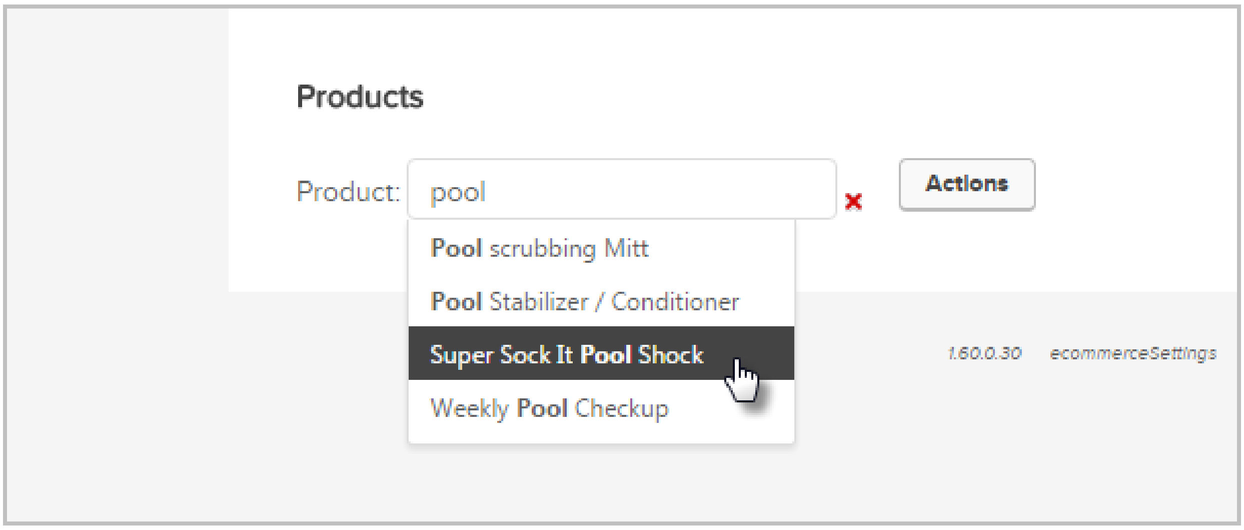
2. Create actions for the default settings. Click on an **Actions** button to add new actions or copy an existing action set



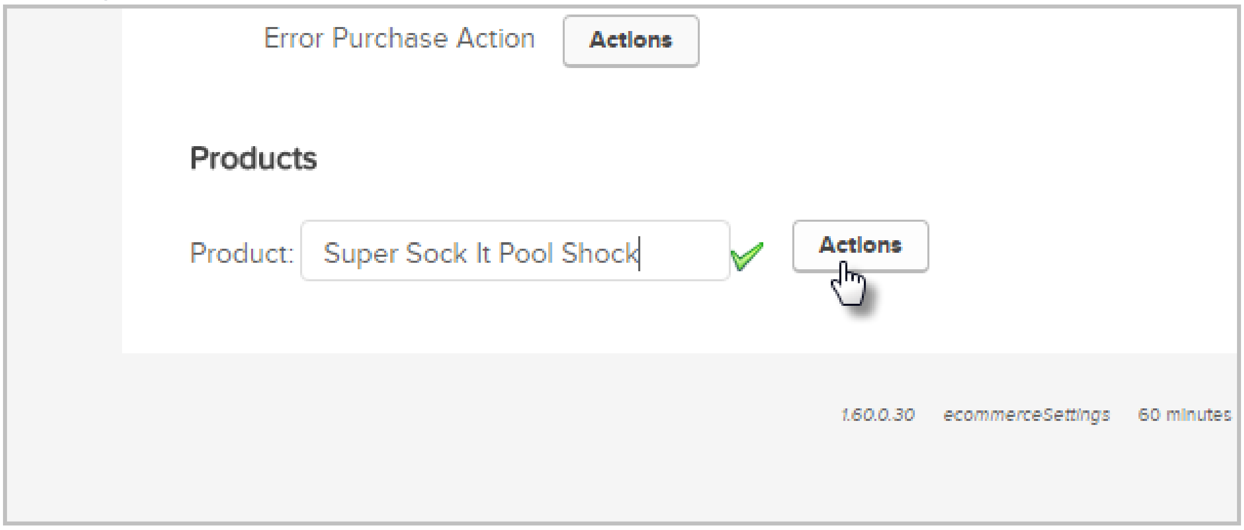
- **On Login (Multi-Step Cart)**: These actions are triggered when someone enters their username and password to log into a multi-step shopping cart.
- **Contact Creation Action**: These actions are triggered when someone purchases who was not already in your Infusionsoft database. The system checks based on first name, last name, and email address. It will create a new contact record if no match exists.
- **Successful Purchase Action**: These actions are triggered each time an order is placed and the credit card charge processes successfully. It can be used to trigger a new customer welcome and transition a contact from prospect to customer by updating tag(s) and contact type.
- **Failed Purchase Action**: These actions are triggered when an order is placed, but the credit card charge fails. You can send a notification email to an internal team member and / or send the customer a message prompting them to contact you to resolve the problem.

- **Error Purchase Action:** These actions are triggered when there is an error (other than credit card failure) that prevents the order from processing successfully. You can send a notification to an internal team member to investigate the error and work to resolve it.

3. To create product specific actions for individual products, click inside the text box and start typing the name of a product, Once you find the product you are looking for, click on it.

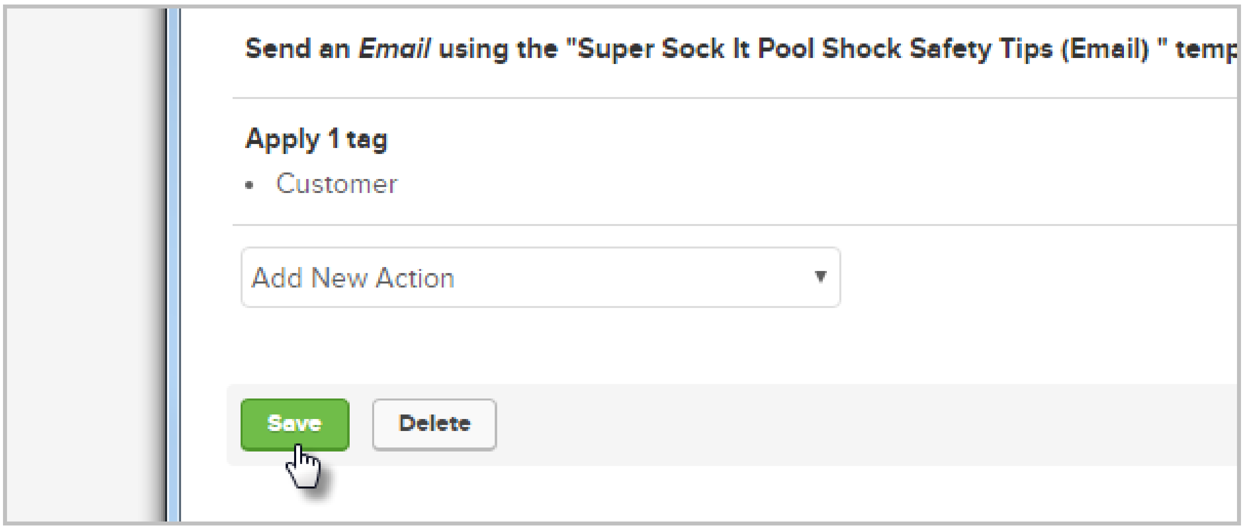


4. Click on the **Actions** button to add or edit the purchase actions for the product These purchase actions run regardless of the purchase method (one-time or subscription.)



5. Add as many actions as you like

6. Click the **Save** button when finished


Send an Email using the "Super Sock It Pool Shock Safety Tips (Email) " temp
Apply 1 tag
Customer
Add New Action
Save
Delete

Using a different version of Infusionsoft? Click Here to learn more

Invoices and Receipts

Last Modified on 08/01/2018 3:00 pm MST

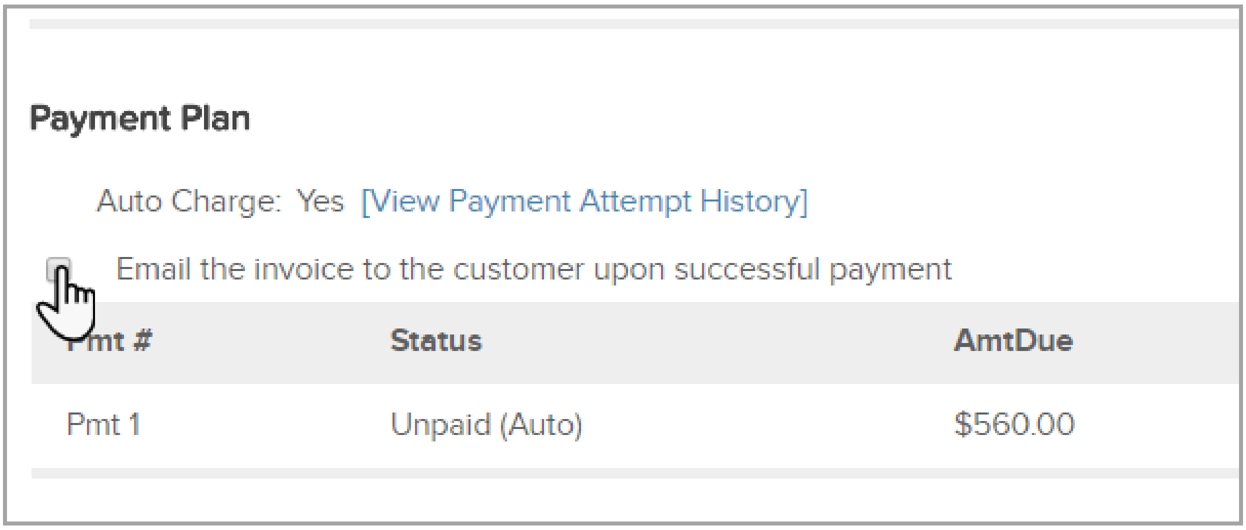
Order Invoices serve two purposes in Infusionsoft: they are used to request payment for unpaid orders and are sent as a receipt for paid orders.

There are two options for Invoices and Receipts

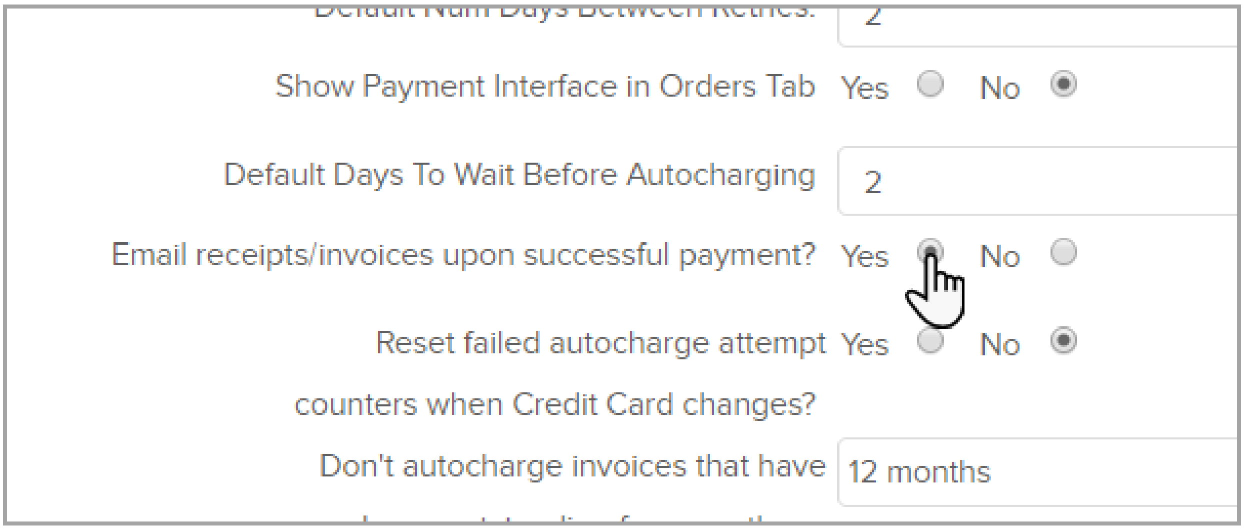
Enable Payments Invoice & Receipt	Legacy Invoice & Receipt
Can pay online	Cannot pay online
No Customization	Can Customize Template (drag and drop & Custom coding)
Click Here for more information	Click Here for more information

Order Invoices are emailed when:

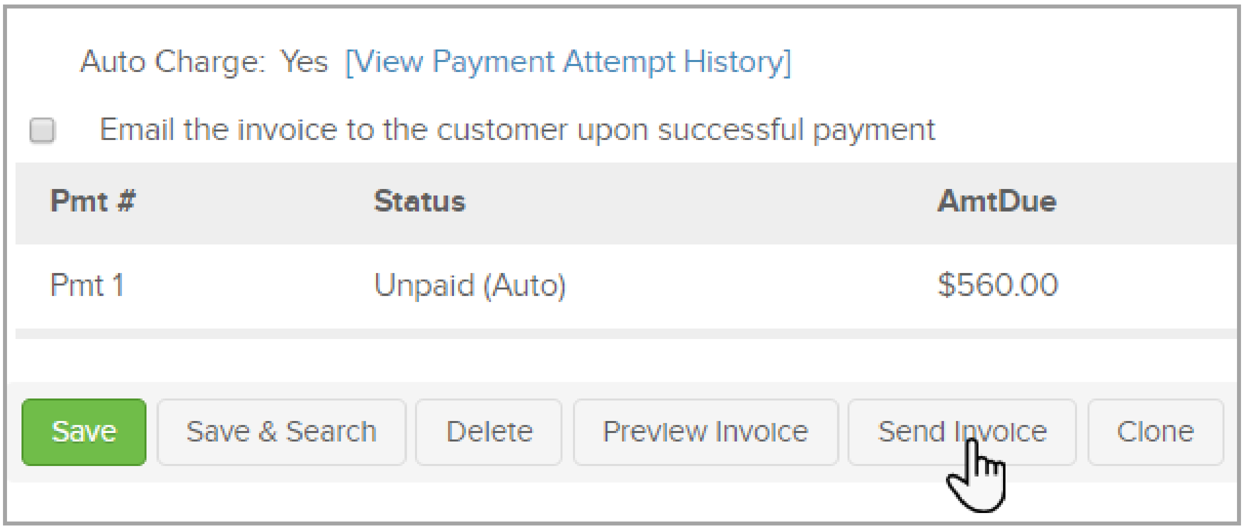
- The "**Email the invoice to the customer upon successful payment**" is checked at the bottom of a Order Record.



- The "**Email receipts/invoices upon successful payment?**" through E-Commerce > Settings > Orders is checked.



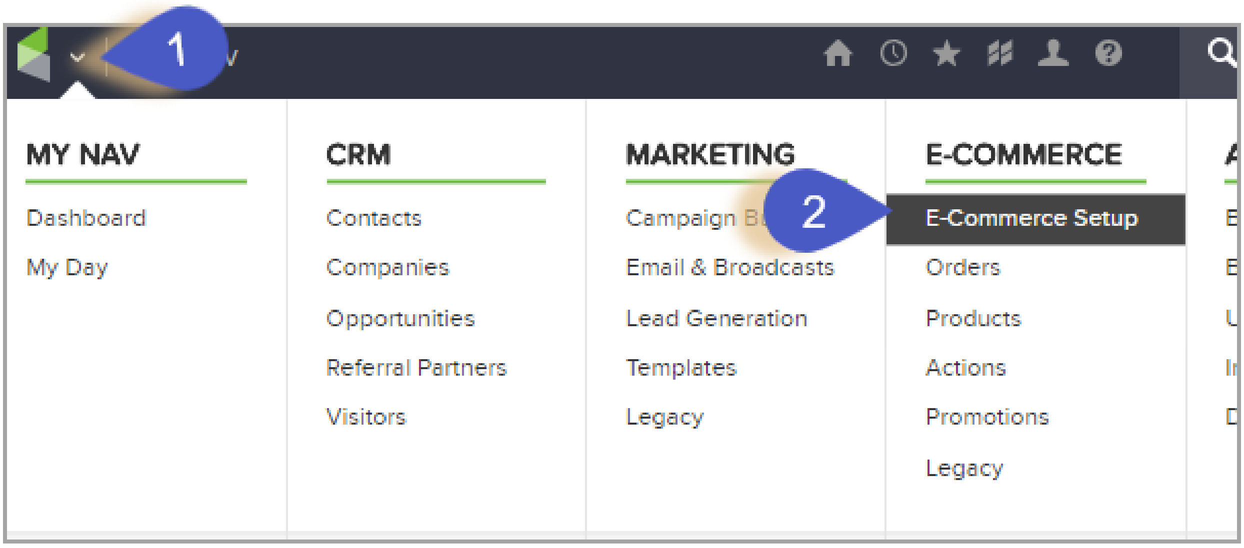
- You can also manually send an invoice when a customer requests it or if you are not automatically sending invoices upon successful payments.

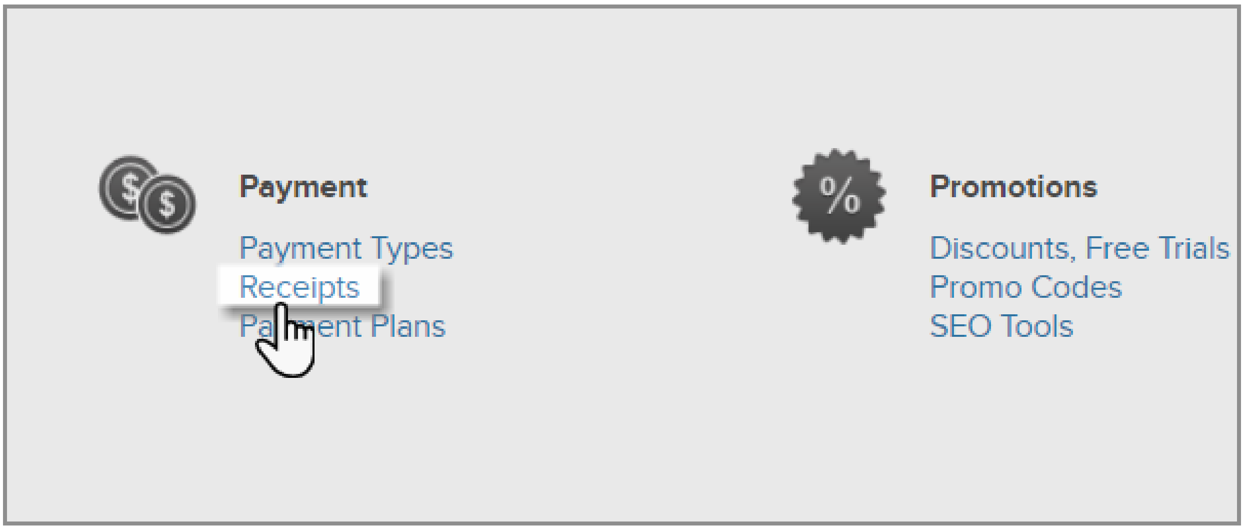


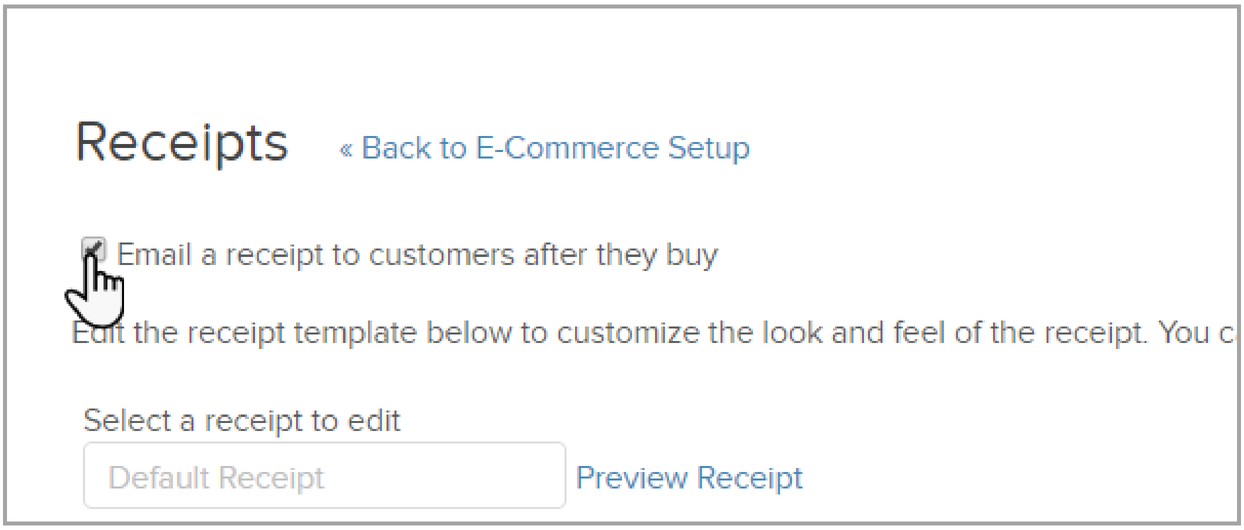
Order Receipt are emailed automatically when:

Order Receipts are sent **only** when a purchase is made through a **Shopping Cart** or **Order Form**. However, payments made through the Invoice is considered a **Order Form** and will trigger the Receipt. Click HERE to find out more about receipts sent when Payments by invoice is enabled.

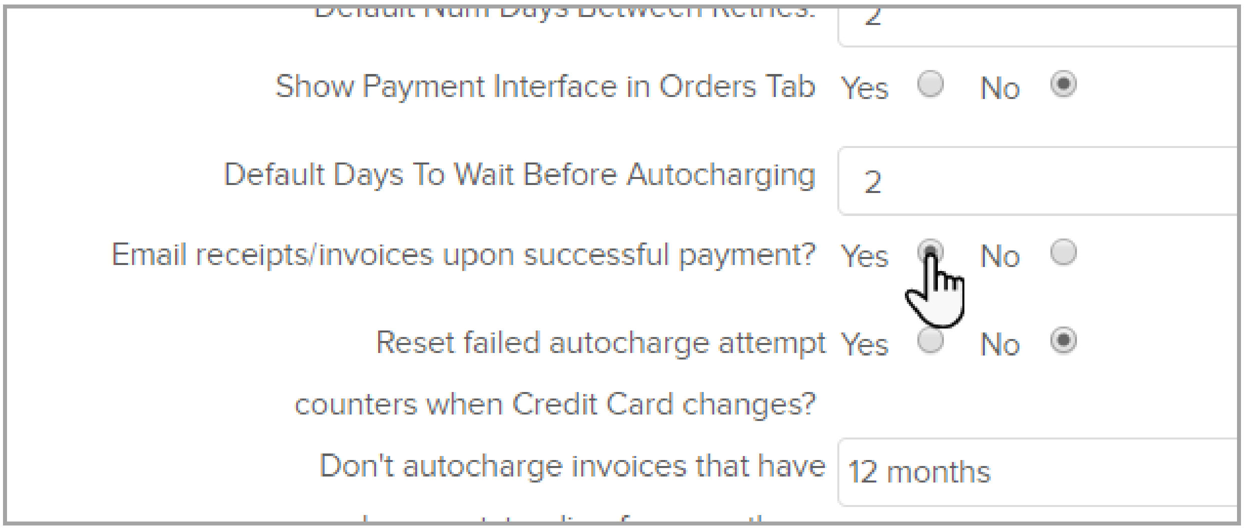
- The **Receipts** is checked through E-Commerce > E-Commerce Setup > Payment Options > Receipts.







- The "**Email receipts/invoices upon successful payment?**" through E-Commerce > Settings > Orders is checked.



Using a different version of Infusionsoft? Click Here to learn more

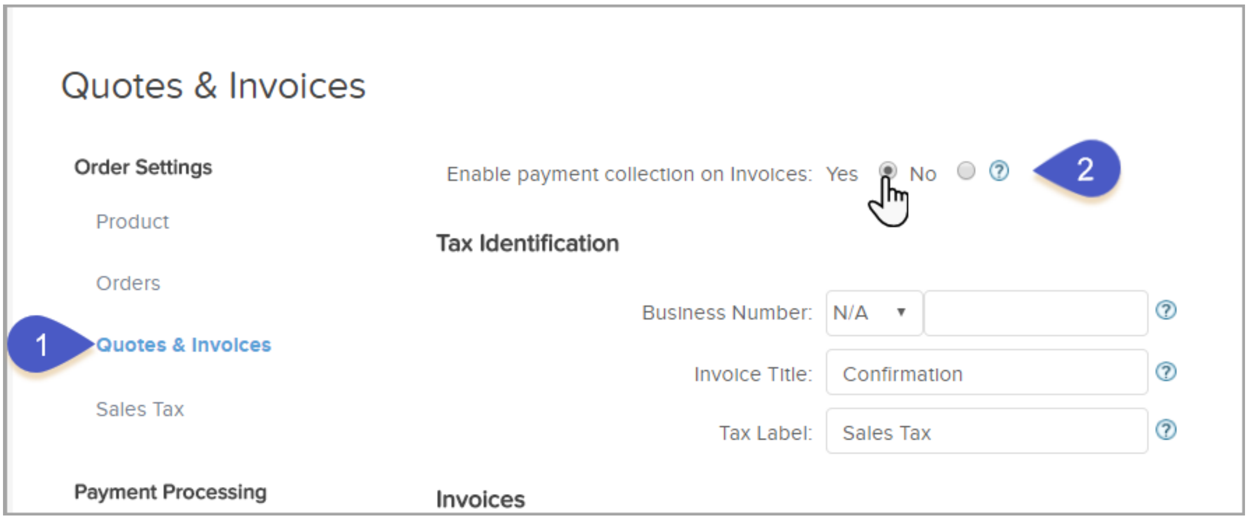
Setup Payment Collection Invoice

Last Modified on 08/01/2018 3:06 pm MST

Enable payment collection on Invoices

The invoices will work with all order types: online orders, unpaid orders, or manual orders. To enable this feature:

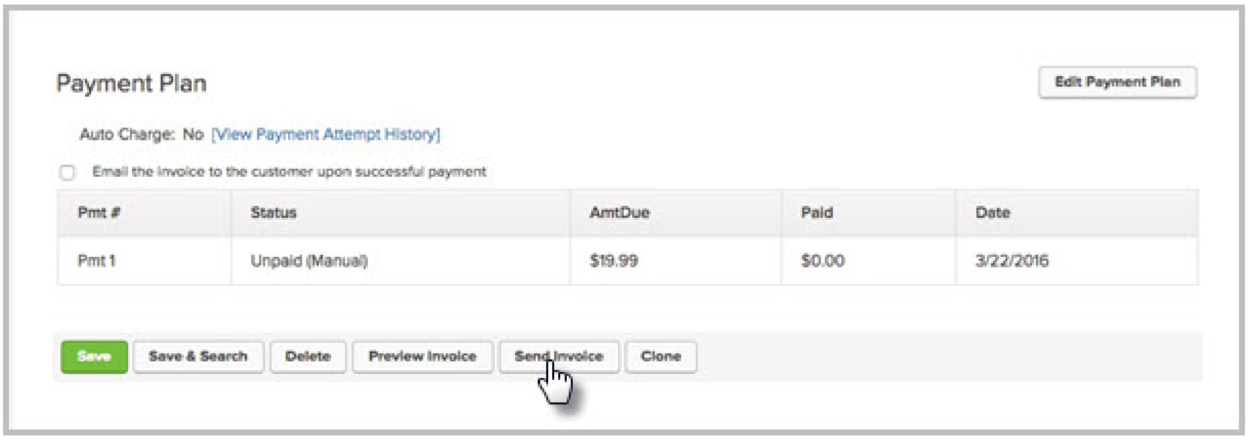
1. Go to **E-Commerce** > **Settings**
2. Click on **Orders**
3. Under the *Invoice* section, you will see a new setting allowing you to enable this new feature.



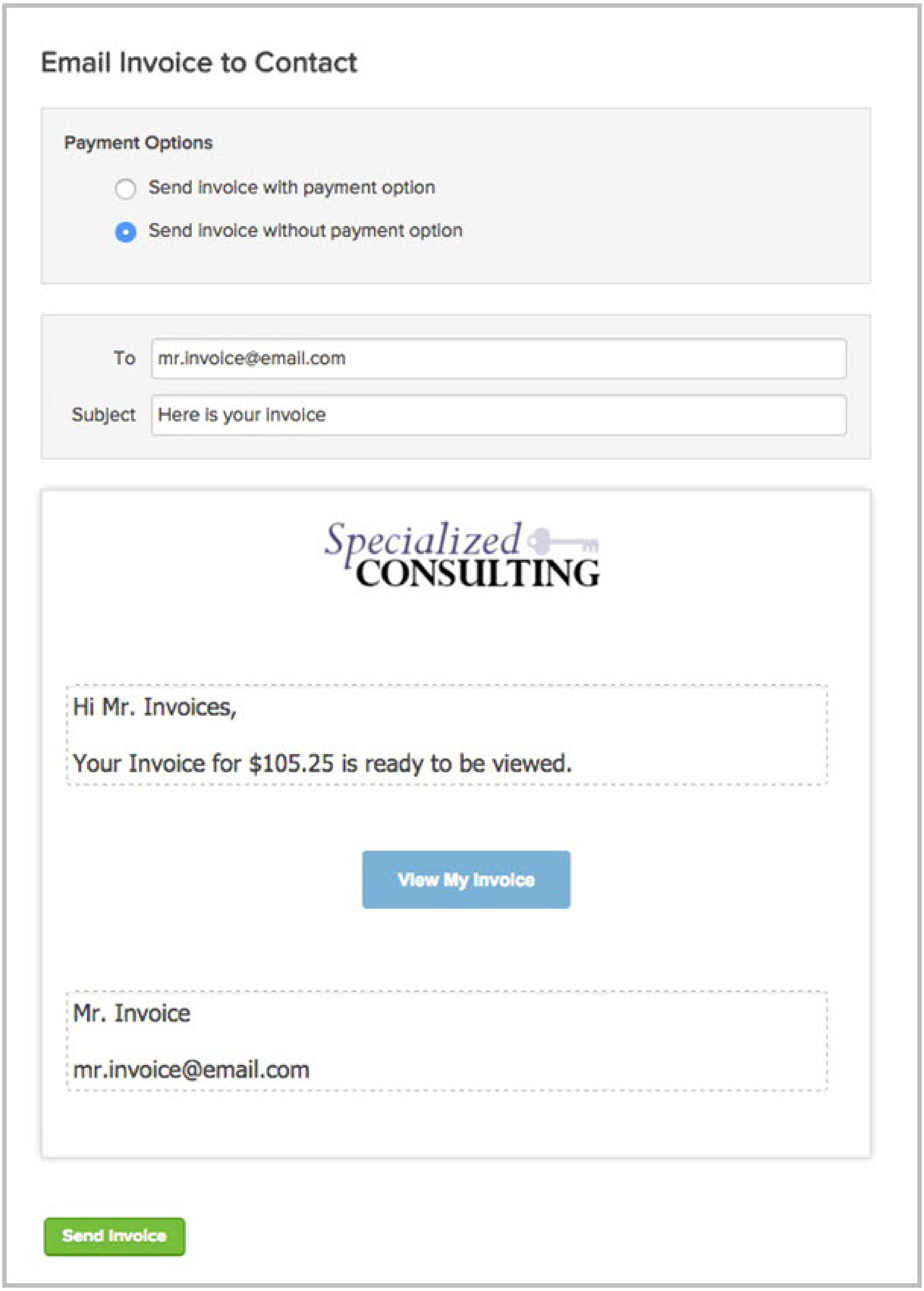
4. Click **Save**

As an example, we'll show you the workflow of sending an invoice from a manual order.

When you are ready to send the invoice from a manual order, click the**Send Invoice** button at the bottom of the order record and follow the instructions below:



1. **Payment Options:** Choose whether to send the invoice with or without an online payment option.



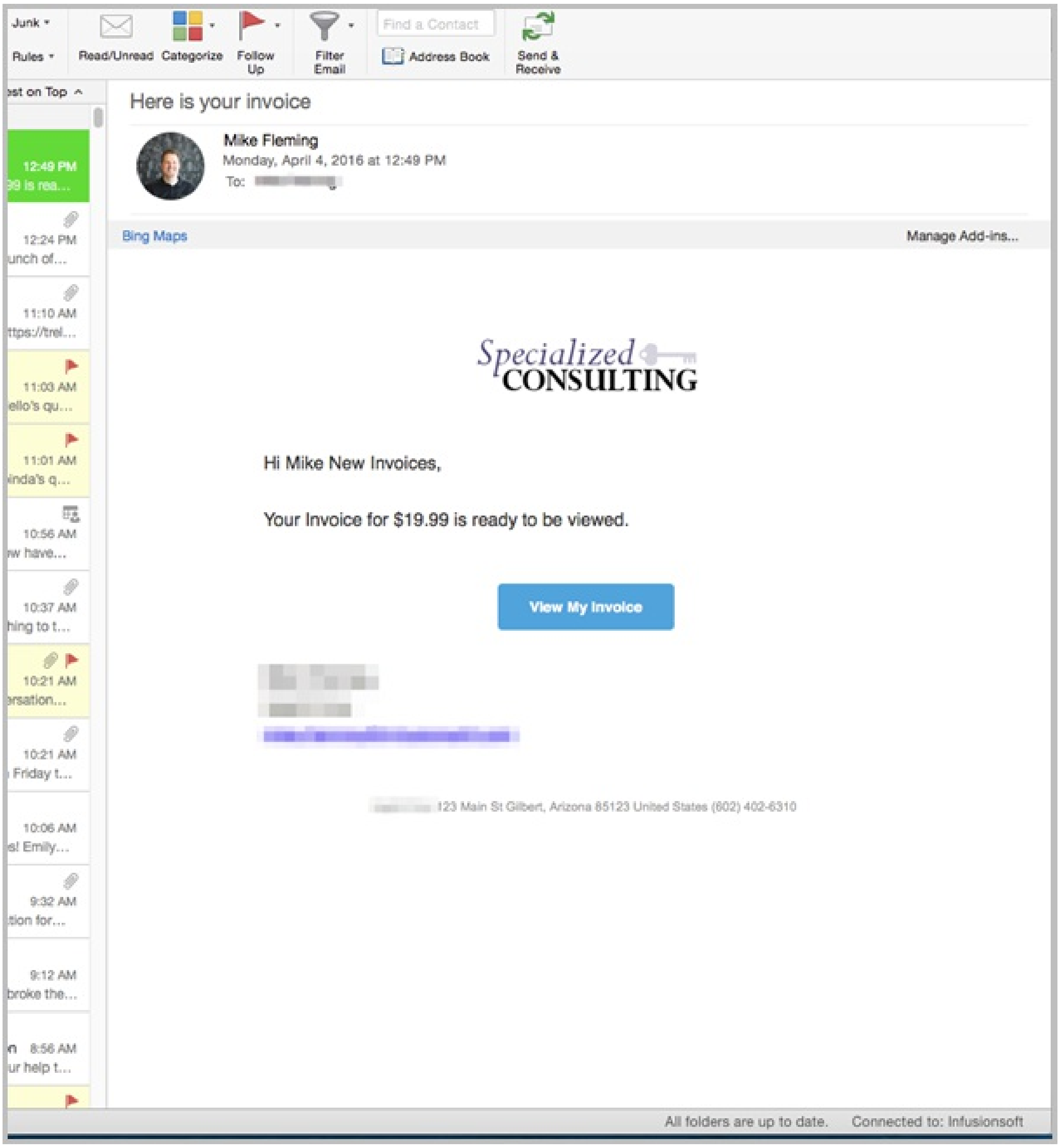
2. Modify the **To** and **Subject** line if you wish.

3. Edit the open text fields

Pro Tip: The logo is pulled from Nav > Admin > Branding Center > Logo Tab > External Pages Logo

4. Click **Send Invoice**

5. Your customer will receive the invoice email with a button labeled, **View my Invoice**. They can view the invoice and its current status (paid or unpaid) at any time in the future.



6. At the bottom of the online invoice, there will be an option to **pay now**.

INVOICE FROM INFUSIONSOFT

Due $19.99

123 Main St
Gilbert, Arizona 85123
United States

Specialized CONSULTING

Mike New Invoices
Invoice # 19
March 22, 2016

ITEM	QTY	TOTAL
Red Velvet Cupcake Red velvet cupcakes are the best because they're red and have hearts on top.	1	$2.00
Super Chocolatey Chocolate Cupcake with Chocolates Chocolate cupcakes are our bestseller. Only 840 calories each. Yum!	1	$2.99
Lemon Cupcake Lemon cupcakes are extra yummy and have cream cheese frosting and a candy lemon wedge on top.	1	$24.00
Lemon Cupcake Free Trial	1	-$24.00
Cupcake of the Month Club A gift they'll never forget! Each month we'll deliver a delicious selection of twelve gourmet cupcak	1	$15.00

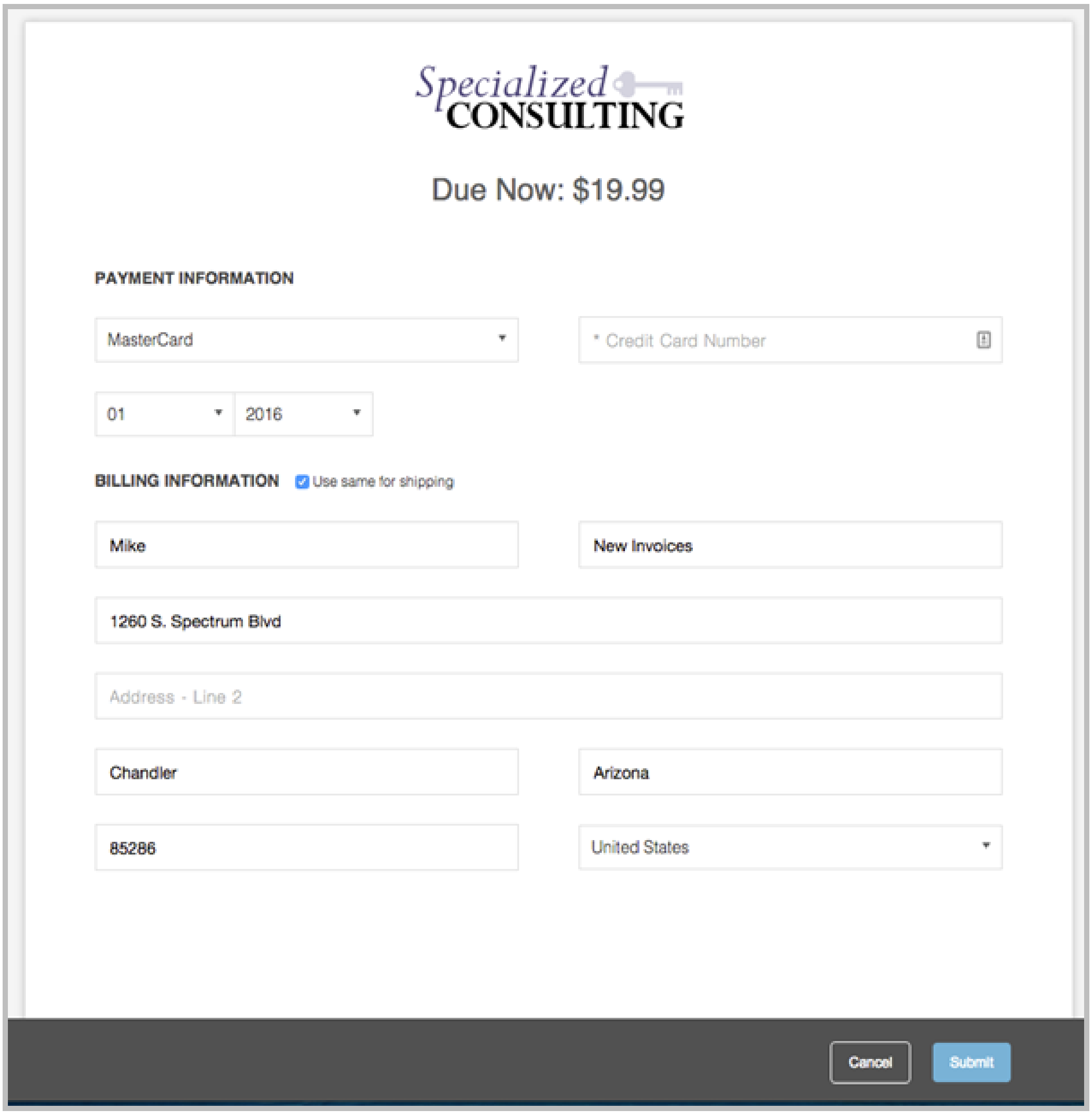
UPCOMING PAYMENTS	TOTAL
3/22/2016	$19.99

INVOICE TOTAL	$19.99
OUTSTANDING BALANCE	$19.99
DUE	**$19.99**

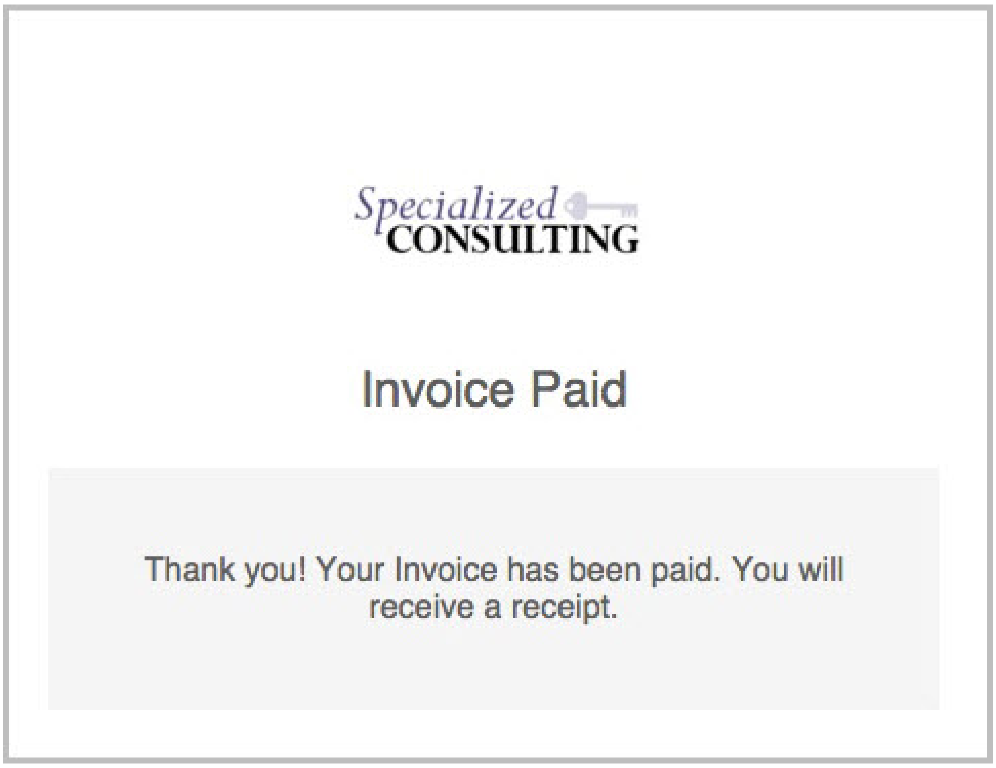
Print

Pay Now

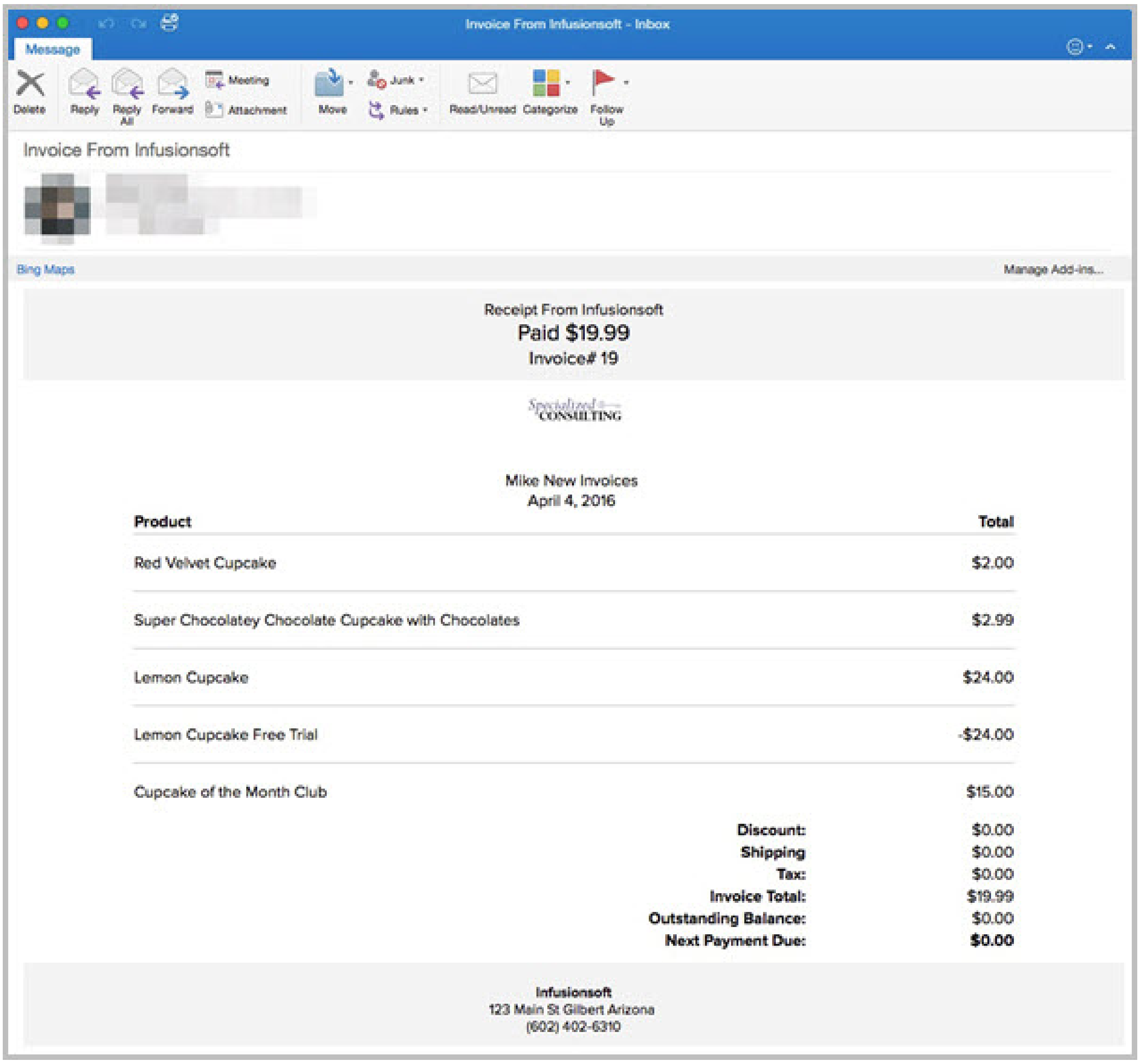
7. Your customer will enter their payment information and click **Submit**.



8. Upon successful payment, your customer will be redirected to an "Invoice Paid" success page.



9. Your customer will then receive an order receipt.



Pro-Tips!

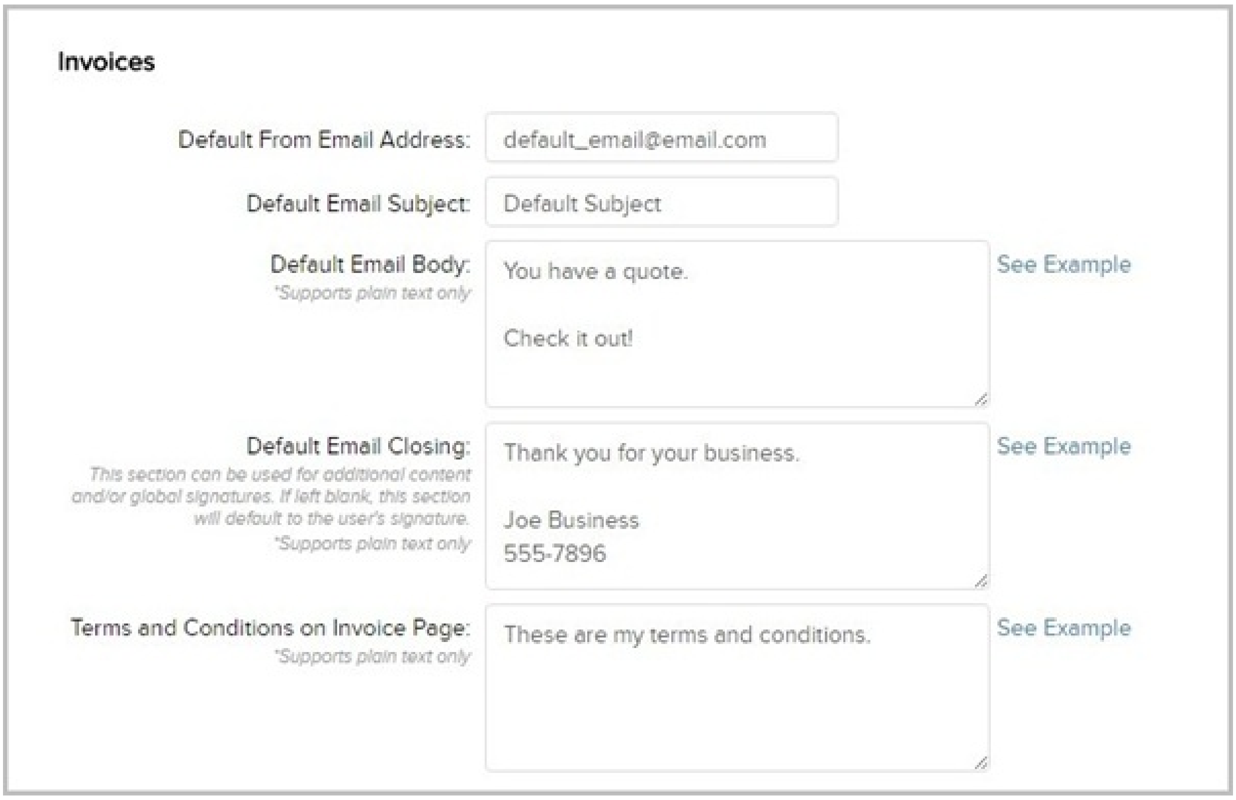
- Invoice templates are mobile responsive, meaning they will maintain a professional look on all devices - like phones and tablets.
- Invoice emails will only allow you to edit the open text fields.
- For a **Receipt** to be sent you must enabled under E-Commerce > Settings > Orders > "Email receipts/invoices upon successful payment?"

Invoice - Default Fields

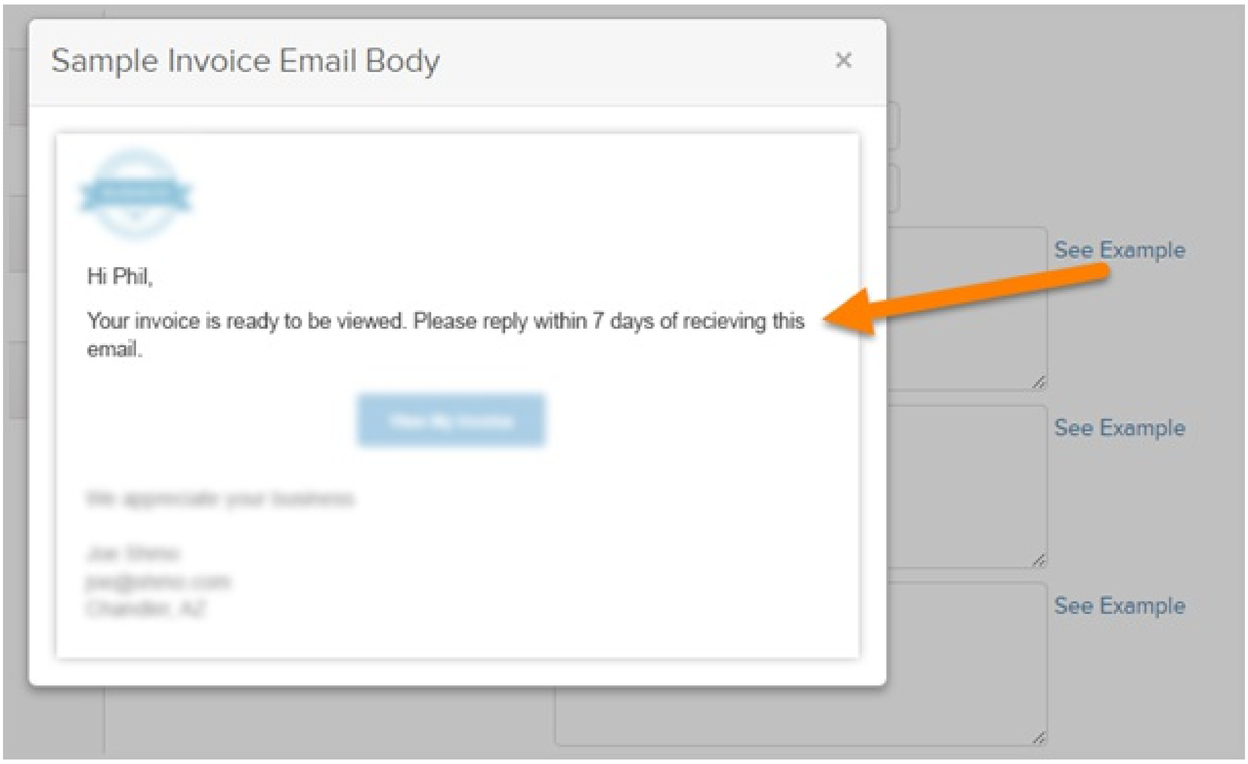
There are options available that will allow you to save default fields for Invoices and Receipts.

You can create and save:

- Default "From" Email Address
- Default Email Subject
- Default Email Body
- Default Email Closing
- Terms & Conditions

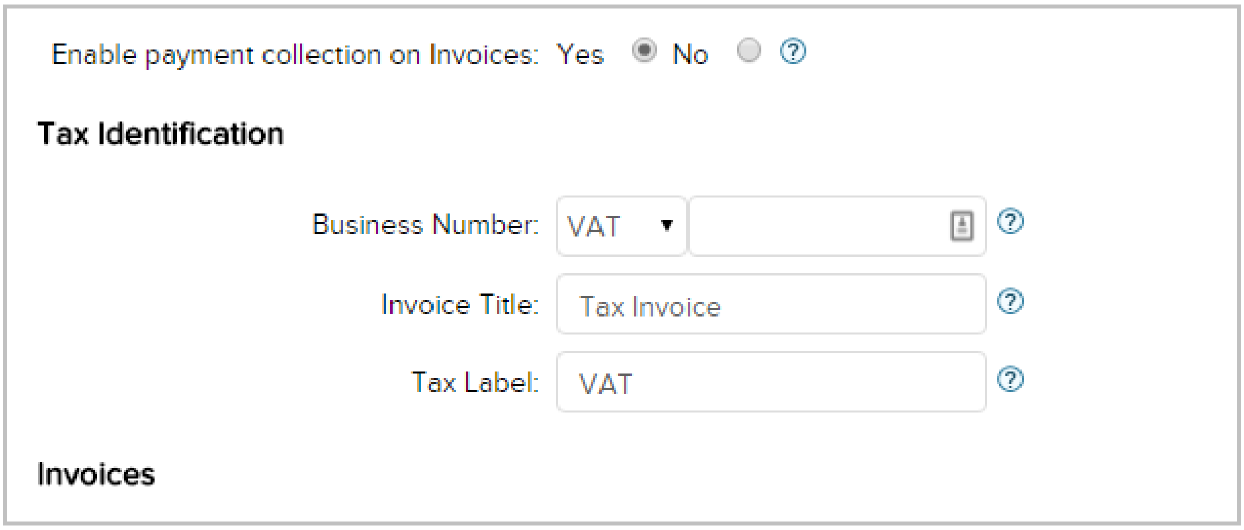


Click on the **See Example** link next to a section to see where it lies on the Invoice or Quote



Invoice - International Tax Settings

As an international customer, you can use Infusionsoft Invoices AND be compliant with your government's invoice tax requirements. There is a setting to add your tax identification requirements.



Available Business Number tax type options:

- ABN
- BN
- EIN

- VAT

Invoice Title and Tax Label will automatically update based on your selected Business Number tax type. However, these fields are editable so you can customize to your specifications as needed.

Legal Requirements for Reference:

- Austraila / New Zealand
- United Kingdom
- Canada
- US

Tax Invoice
July 14, 2016

ACMESOFT
http://www.theverge.com/
123 Main St
Gilbert, Arizona 85123
United States
(602) 402-6310

INVOICE #
55

BILLED TO JOHN WILKINSON
1234 Stratum St
London, ME7 9AA
United Kingdom

ITEM	QTY	UNIT PRICE	TOTAL
Chocolate Cake	1	£19.00	£19.00

UPCOMING PAYMENTS	TOTAL
7/14/2016	£20.90

VAT	£1.90
INVOICE TOTAL	£20.90
OUTSTANDING BALANCE	£20.90
PAYMENT DUE TODAY	**£20.90**

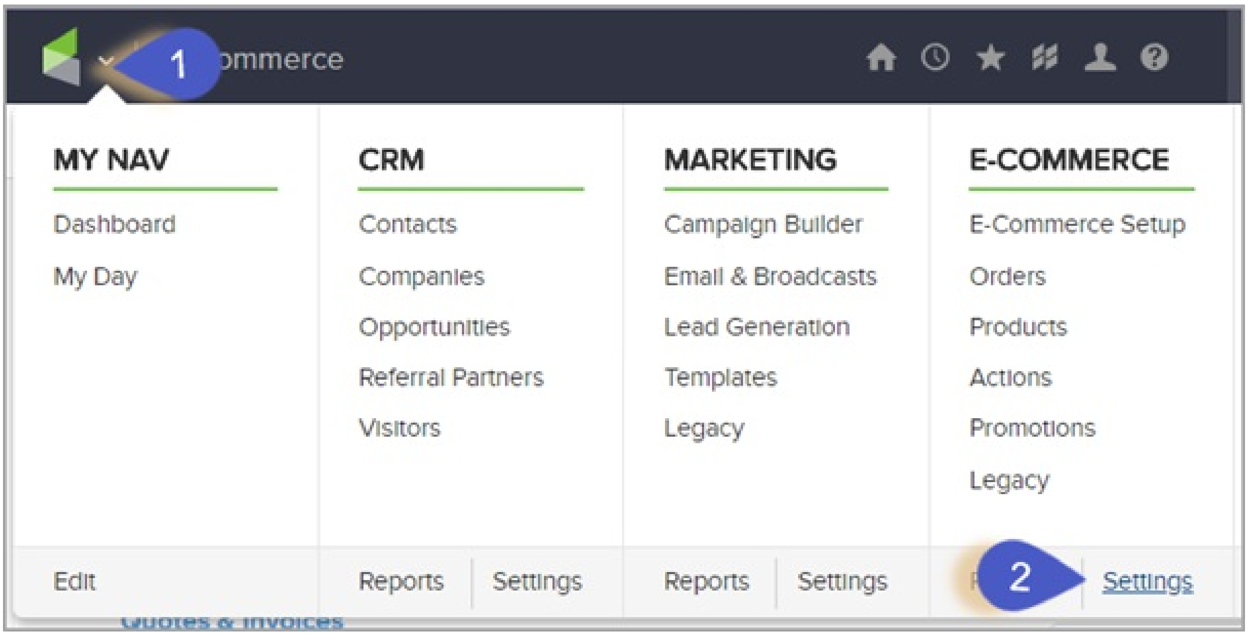
The total price includes VAT

These are my terms and conditions.

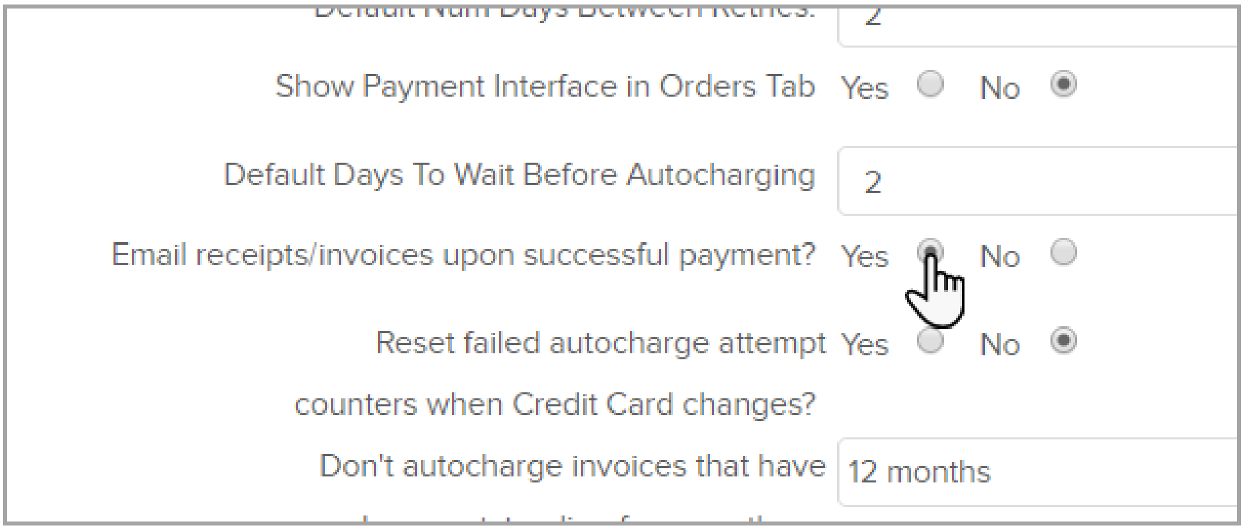
Receipts

There are a couple settings that will trigger a Receipt when a purchase is made. When an order is paid for through an invoice a receipt can be sent confirming payment.

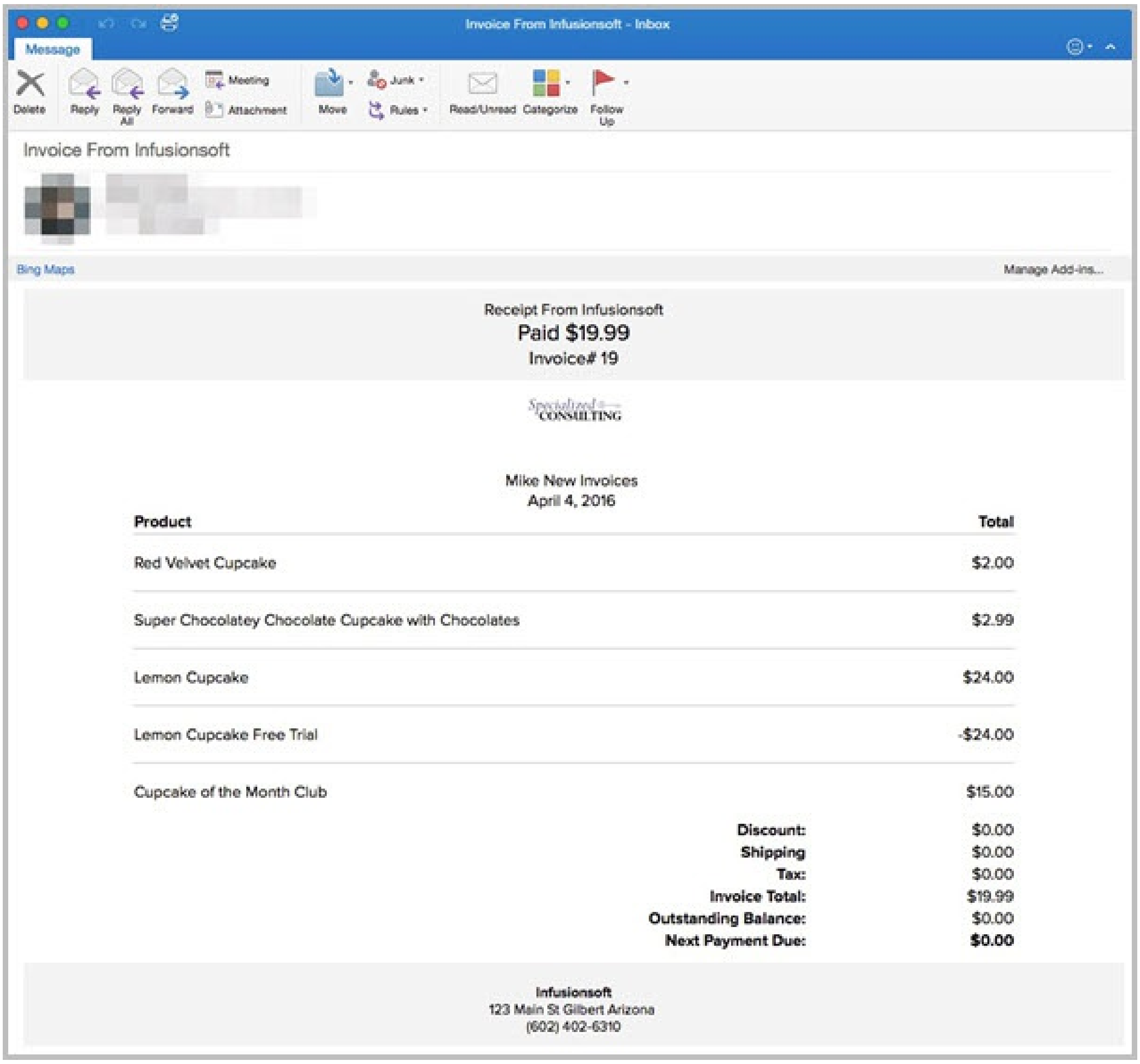
1. Go to E-Commerce > Settings > Orders



2. Check Yes next to "**Email receipts/invoices upon successful payment?**"



3. This will then send this Receipt when a payment is made through an Invoice.



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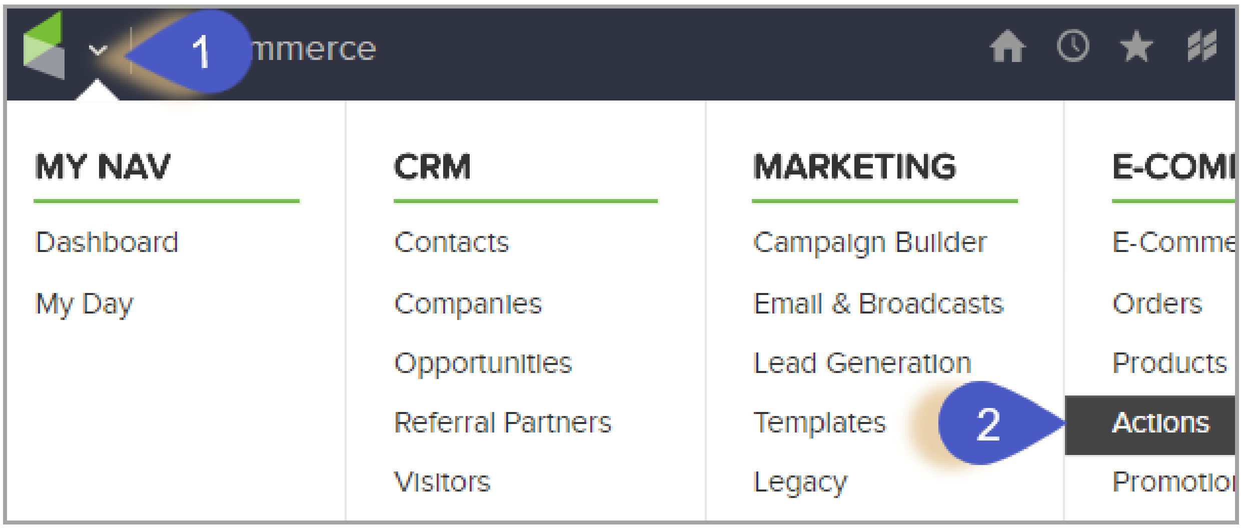
Automate Follow-Up When a Purchase is Made

Last Modified on 08/01/2018 3:07 pm MST

By default, purchase actions trigger when someone purchases through the shopping cart and order forms. Purchase actions will also trigger for legacy order form purchases and manual orders if you have a product specific action set up and you have this option enabled under **E-Commerce** > **Settings** > **Products** section.

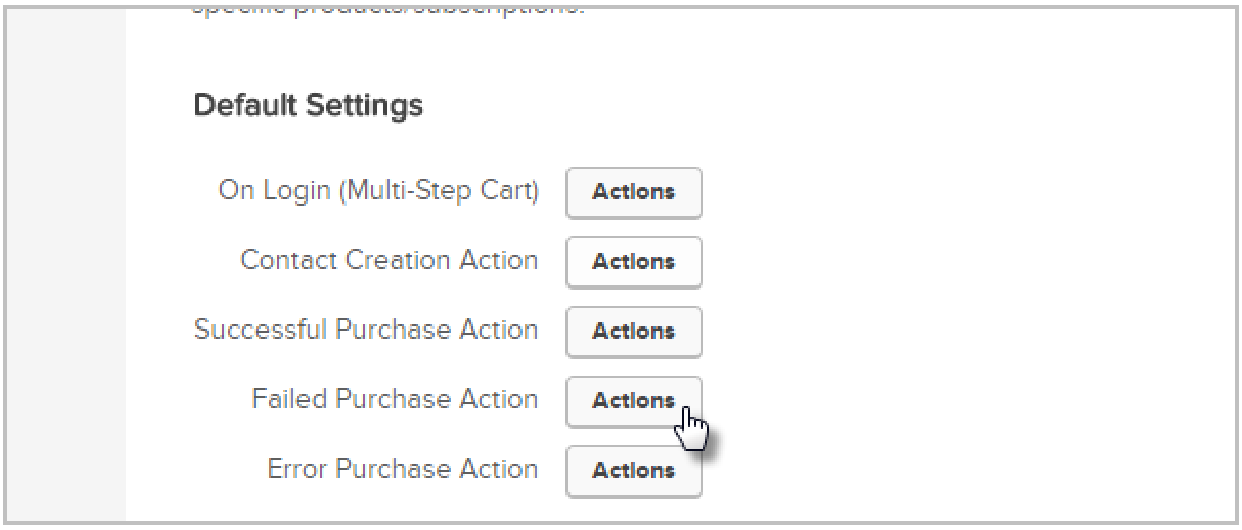
Protip: For successful purchase actions it's recommend to use the Campaign Builder Purchase Goal . This offers more reporting options

Go to **E-Commerce** > **Actions**



Create actions for the default settings. Click on an **Actions** button to add new actions or copy an existing action set

Protip: These are pop-ups. Make sure your browser doesn't have pop-up blockers enabled.



- **On Login (Multi-Step Cart)**: These actions are triggered when someone enters their username and password to log into a multi-step shopping cart.
- **Contact Creation Action**: These actions are triggered when someone purchases who was not already in your Infusionsoft database. The system checks based on first name, last name, and email address. It will create a new contact record if no match exists.
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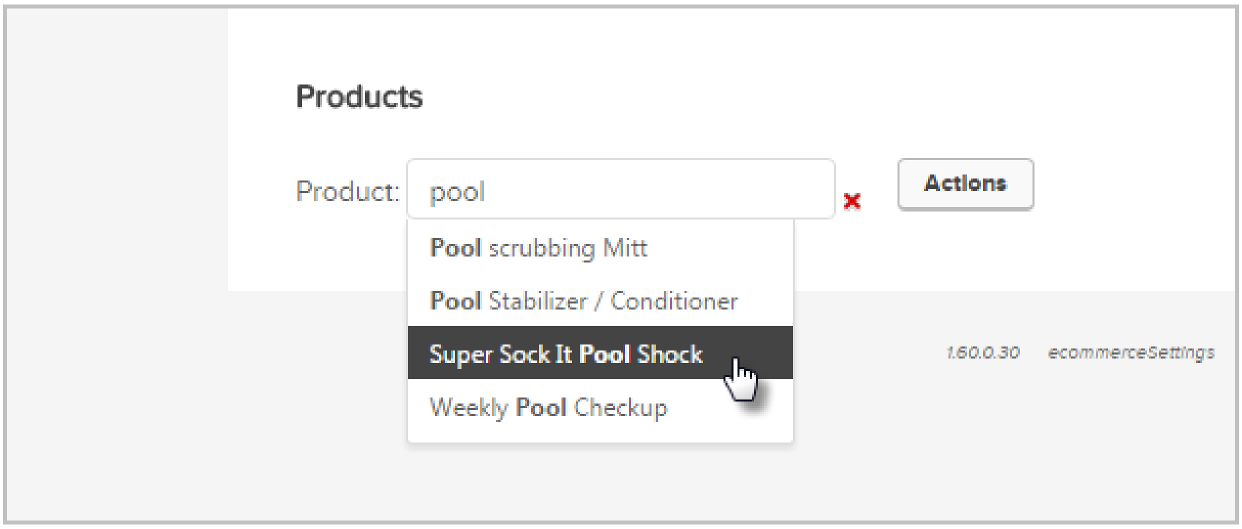
- **Failed Purchase Action**: These actions are triggered when an order is placed, but the credit card charge fails. You can send a notification email to an internal team member and / or send the customer a message prompting them to contact you to resolve the problem.
- **Error Purchase Action**: These actions are triggered when there is an error (other than credit card failure) that prevents the order from processing successfully. You can send a notification to an internal team member to investigate the error and work to resolve it.

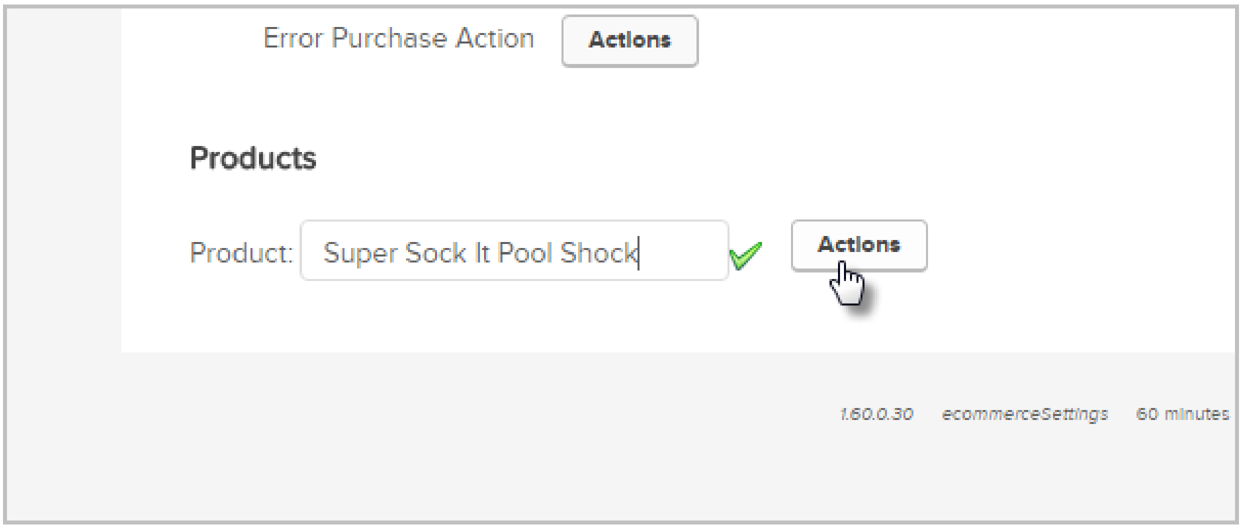
To create product specific actions for individual products, click inside the text box and start typing the name of a product

Once you find the product you are looking for, click on it.

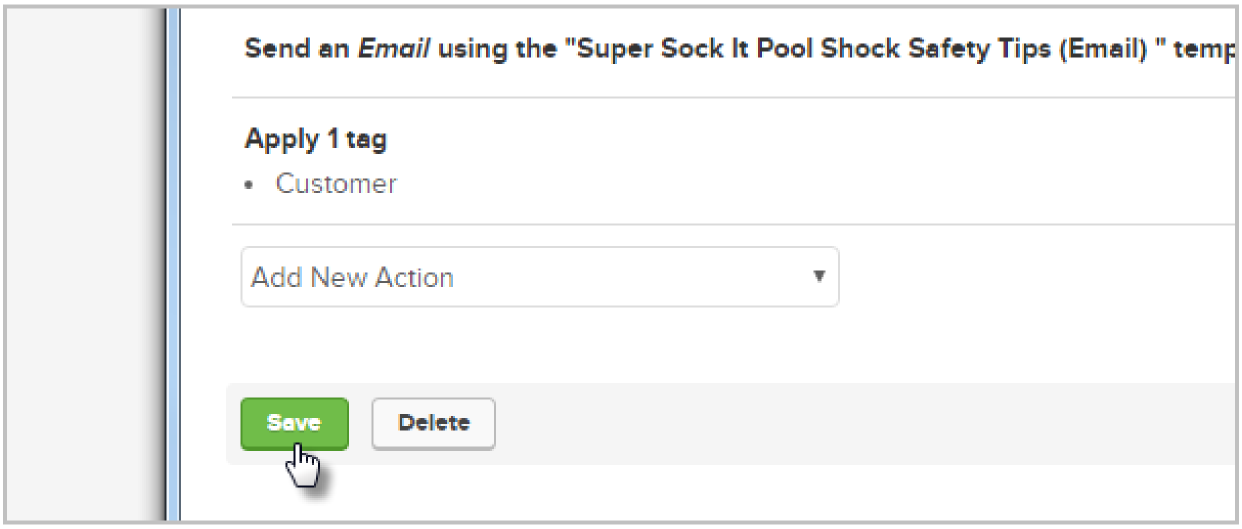


Click on the **Actions** button to add or edit the purchase actions for the product

These purchase actions run regardless of the purchase method (one-time or subscription.) Add as many actions as you like.



Click the **Save** button when finished

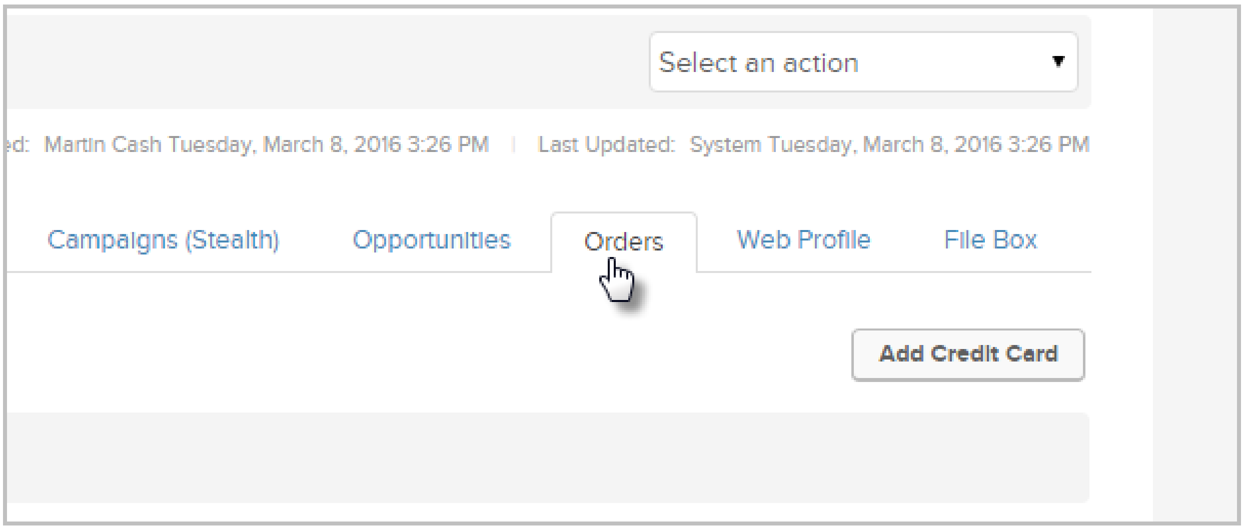

Send an Email using the "Super Sock It Pool Shock Safety Tips (Email) " temp
Apply 1 tag
Customer
Add New Action
Save
Delete

Manually Send an Invoice

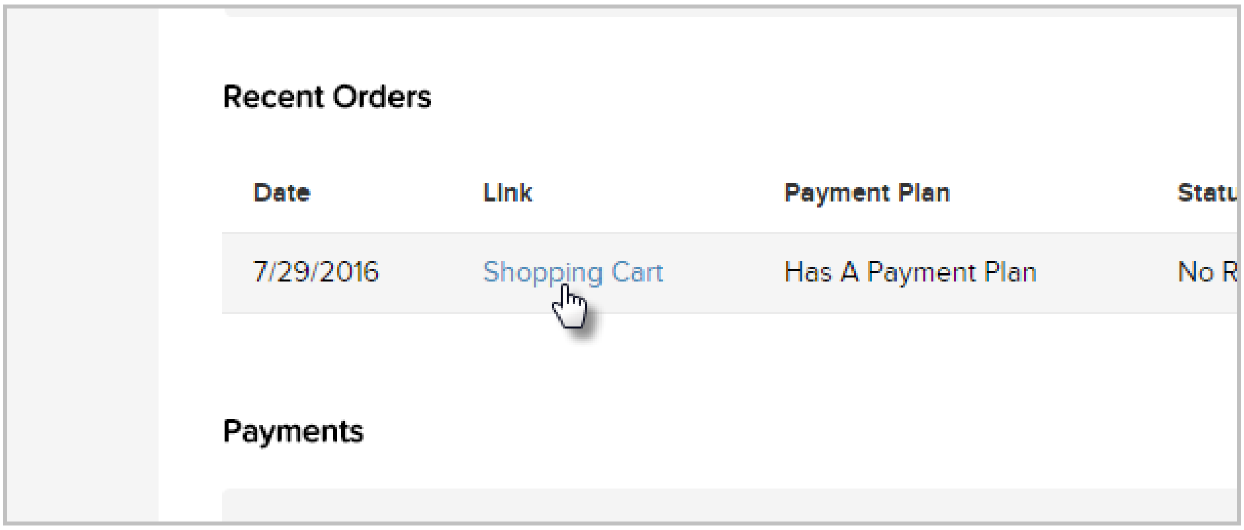
Last Modified on 08/01/2018 3:07 pm MST

You can also manually send an invoice when a customer requests it, you want to send an invoice for an unpaid order, or if you are not automatically sending invoices upon successful payment.

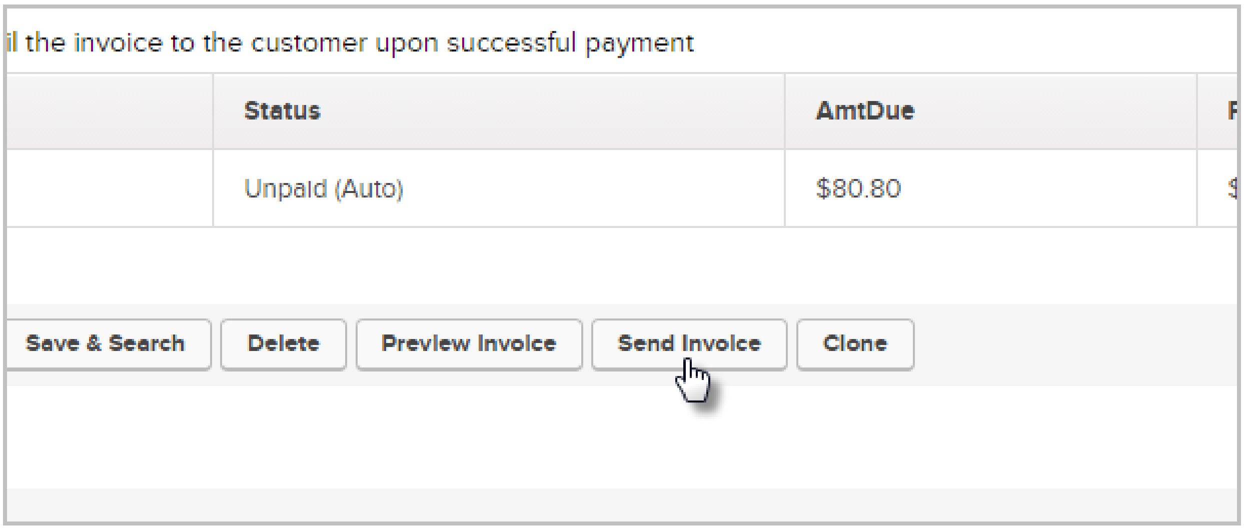
- While viewing a contact record, click on the Order tab.



- Click on the name of the order to open it.



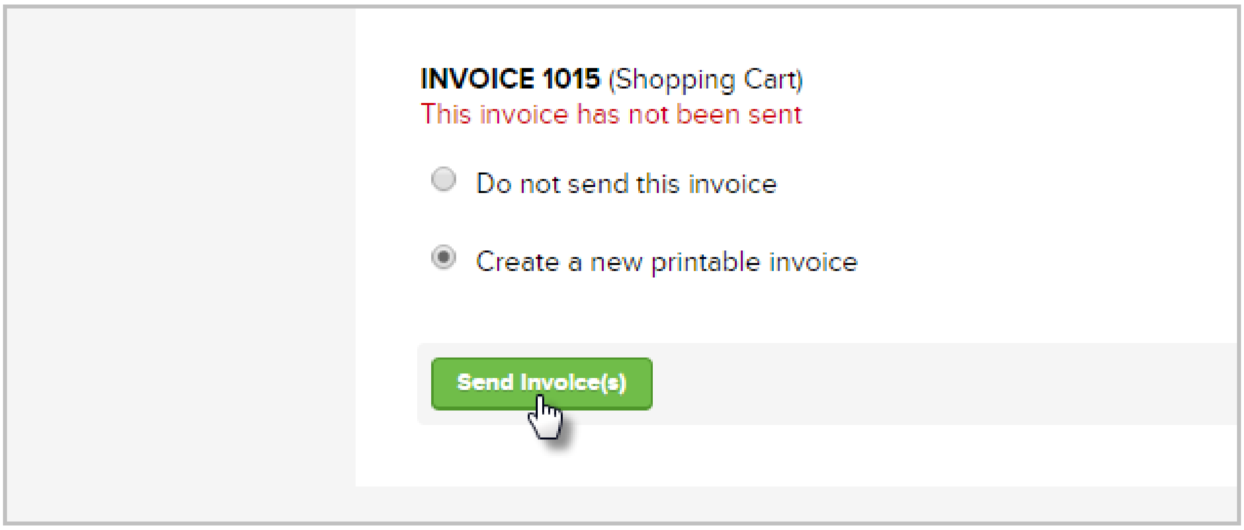
- Scroll down to the bottom of the order and click on the **Send Invoice** button.



Choose to send the email without invoice, or with printable invoice and click on the **Send Invoice(s)** button.

By default, the option to 'Create a new Printable Invoice' is selected but there are 2 options:

- "Choose 'Do not send this invoice'", the email will be sent without the invoice attached.
- "'Create a new printable Invoice'", the system will create the invoice as an attachment and it will be sent with the email.



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Merchant Accounts And Gateways Explained

Last Modified on 08/01/2018 3:08 pm MST

What is a Merchant Account?

A merchant account is a type of bank account that is used to hold funds from credit and debit card transactions. When you swipe your debit card or fill out credit card information online, a payment gateway bundles and approves the transaction and then the money from your personal account or credit line is processed and acquired by a merchant account. This all happens in a matter of seconds. From there, the funds are normally transferred to a business bank account after a few days.

In order to accept credit and debit cards online, you must have a merchant account setup with one of our approved providers, like PowerPay. The alternative is to use an aggregator (PayPal), which uses their own merchant account to process transactions on behalf of another company or individual. When you use an account provider like PowerPay, you get a dedicated account with strong customer service. If you are looking for a merchant account or considering switching from your current provider, we recommend Infusionsoft Payments.

What is a Payment Gateway?

A payment gateway is simply the gatekeeper. When you swipe your credit card or purchase an item online, the gateway will bundle the info and send it to Visa or MasterCard and then down the line to the issuing bank to confirm there are sufficient funds. If everything is in order, the gateway will approve the transaction and pass approval to the merchant account. At this point, the merchant account captures the funds from the transaction.

As mentioned above, you must have a merchant account and a payment gateway in order to accept online transactions. It is common for a merchant account and a payment gateway to be provided as a package deal by the same company. For example, if you sign up for an Infusionsoft Payments account, the gateway is included as an all in one solution that is directly integrated into your Infusionsoft application.

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Payment Options In Infusionsoft

Last Modified on 08/01/2018 3:08 pm MST

You can use PayPal and/or a merchant account to process payments. When an order is placed through the shopping cart, an order form, or via a manually created order, Infusionsoft collects the information (e.g., customer, product(s) fees, sales tax, and shipping fees). It then calculates an order total and passes that number and the billing information (name, address, and encrypted credit card number) securely to a payment processor. The payment processor takes that information and completes the actual financial transaction, charging the customer's credit card.

The payment processor also handles the currency part of the transaction. Infusionsoft passes a number to the processor, and the charge is processed based on the currency you have set up in their system.

Payment Processor Type	Benefits	Compatible Order Method(s)	Item Type(s)
	• Inexpensive to set up		

Payment Processor Type	Benefits	Compatible Order Method(s)	Item Type(s)
• PayPal	• Easier to qualify • Customers can pay with balance transfers • Pay per use, no monthly fee	• Shopping cart and order forms	• Products and Subscriptions
• Merchant Account / Gateway *Note: Paypal Payflow Pro is a gateway. It is different from a standard business PayPal account.*	• More robust • Customer makes the payment on your website • Credit card statement displays your business name	• Shopping cart, order form, and manual orders	• Product and subscription • payment plans

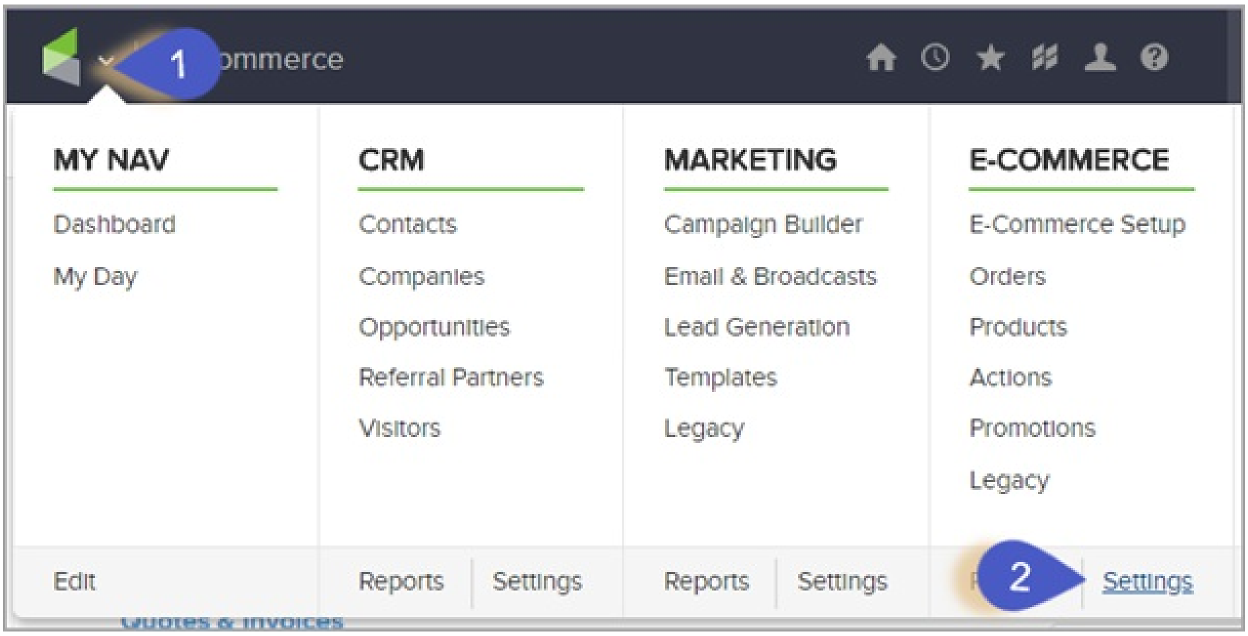
Using a different version of Infusionsoft? Click Here to learn more

Enable Merchant Account Error Notifications

Last Modified on 08/01/2018 3:09 pm MST

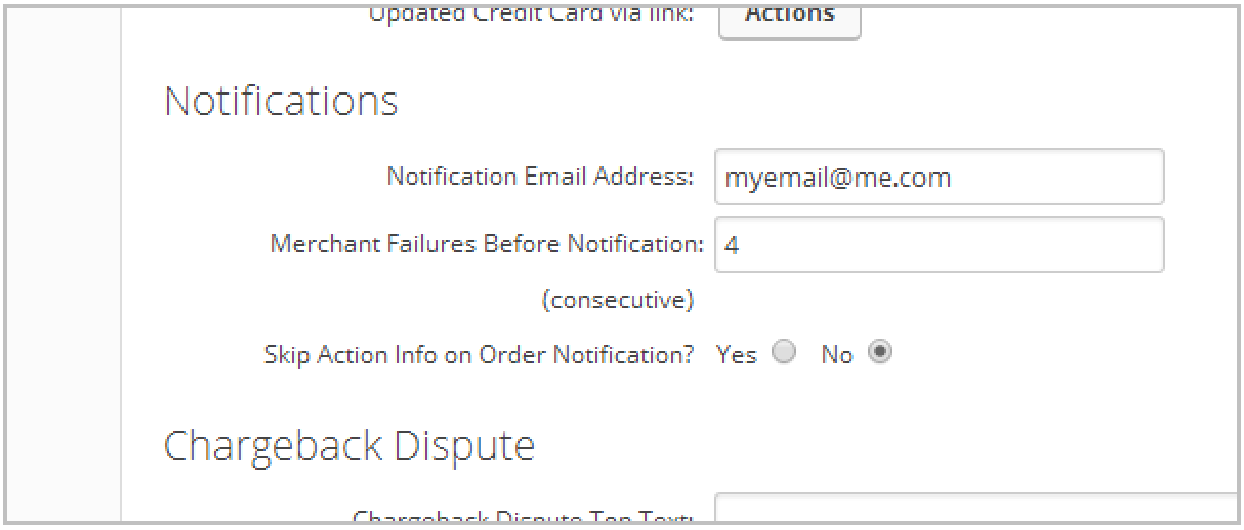
Use this setting to send yourself a notification email when your merchant account does not process an order multiple times in a row.

1. Go to **E-Commerce > Settings**

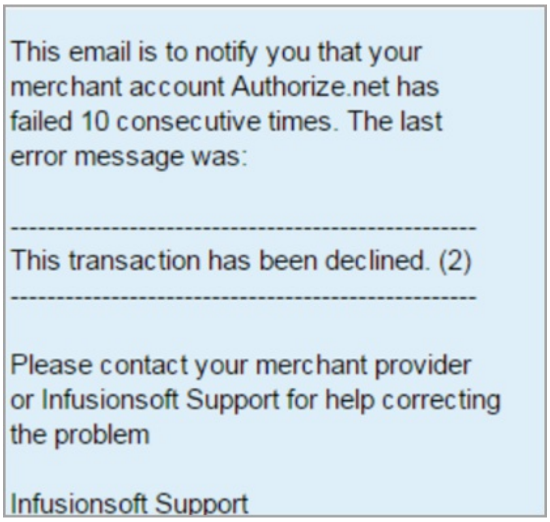


2. Click on **Orders** in the *settings* menu.

3. Go to the *Notifications* section to edit the following defaults:



- **Merchant Failures Before Notification:** The system will **automatically send** the notification email every time a merchant account cannot process a charge for an individual order. Enter a number here if you want the charge to fail more than once before you get notified. This number represents consecutive failures for an individual order and is reset to zero when a charge is successfully processed for that order.



This email is to notify you that your merchant account Authorize.net has failed 10 consecutive times. The last error message was:

This transaction has been declined. (2)

Please contact your merchant provider or Infusionsoft Support for help correcting the problem

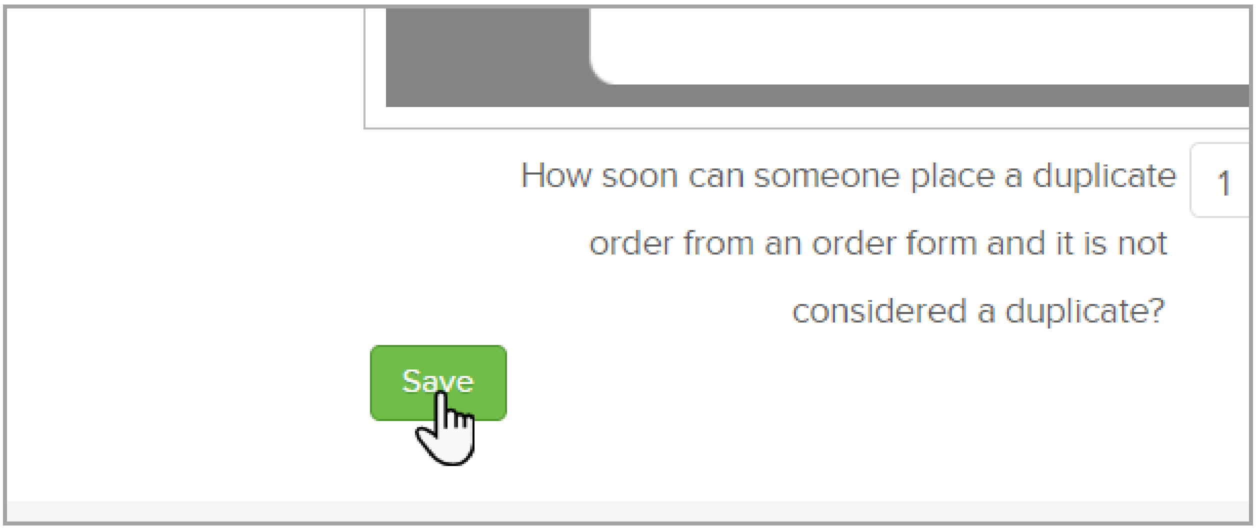
Infusionsoft Support

- **Notification Email Address:** This email address will receive a notification when a merchant account cannot process a charge. You can view the failure reason in the order record under the payment status column. You may need to update merchant account settings in Infusionsoft, contact the customer, or work with the merchant account provider to resolve the issue.

> Protip: If the Notification Email Address field is empty the notification will be

sent to the Default User .

4. Scroll to the bottom of the settings and click on **Save** to apply the updates.



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Supported Merchant Accounts

Last Modified on 10/04/2018 2:52 pm MST

Below, are the merchant accounts and gateways that we currently support. You will need to research these companies further to determine which of these providers is best for your business. Note that qualification requirements, fees, order thresholds, and services vary.

To help you choose the best service possible, we have listed out the merchant accounts and gateways along with the geographic area they serve. If you are in the **US, UK or Canada**, we recommend our own processor, **Infusionsoft Payments**.

Infusionsoft Payments is built for small businesses like yours and will give you the best level of integration. You can use the following links to learn more, review their sites, service countries, and programs.

After you set up an account with one of these providers, go to **E-Commerce > E-Commerce Setup** and click on **Payment Type**.

The following merchants Beanstream, Sage Pay, Easy Pay, Worldpay, USA ePay, Moneris, DPS, Internet Secure are no longer be available in Infusionsoft. For more information review the Release Notes here .

Merchant Account Options

PowerPay	We recommend because they are the leading provider of merchant account services for small businesses. PowerPay can provide payment acceptance for eCommerce merchants who do not have a presence within the US. Click here to learn more.
PayPal Payflow Pro	Click here to learn more.

Authorize.net	US, Canada, Possibly more (contact the vendor) Click here to learn more.
eWAY	Australia Click here to learn more.
CartConnect	CartConnect creates custom integrations between your merchant account and Infusionsoft. Click here to learn more.
Nexus Merchants	Many countries are available. Click here to learn more
Network Merchants (NMI)	US only. Click here to find out more. (Scroll all the way down to submit a "GET IN TOUCH TO LEARN MORE" form)

Using a different version of Infusionsoft? Click Here to learn more

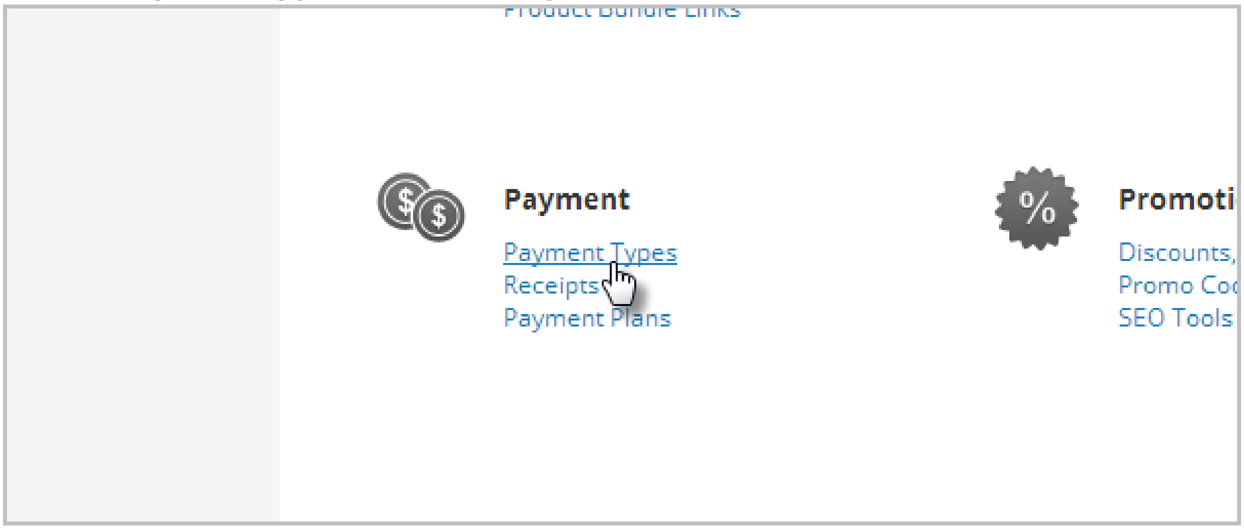
Powerpay Merchant Account

Last Modified on 08/01/2018 3:09 pm MST

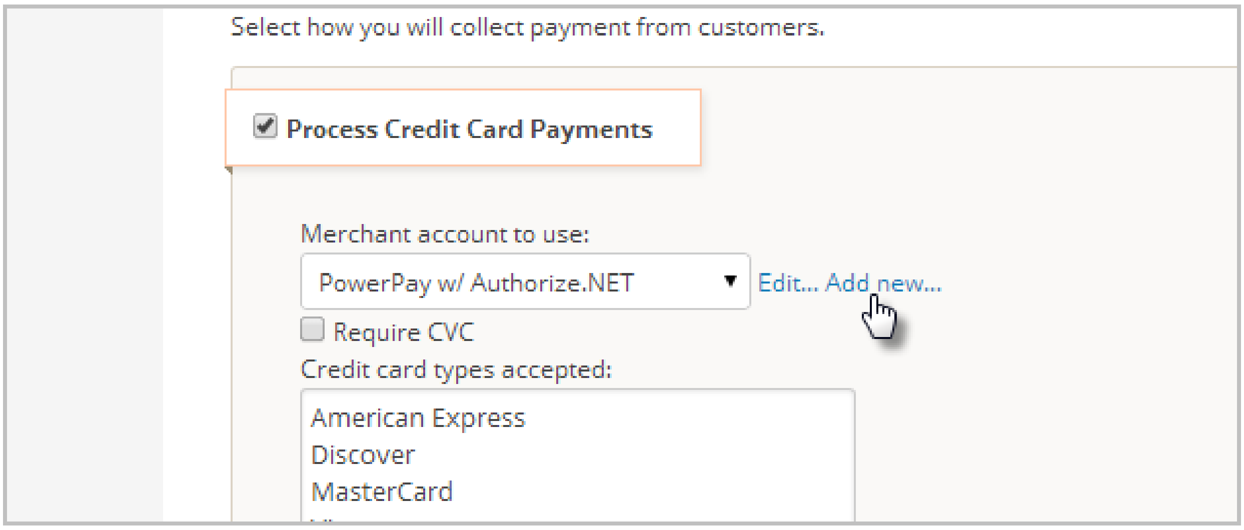
PowerPay provides merchant account services in the United States and Canada. When you integrate with a PowerPay merchant account, you can process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. PowerPay will create a bundled package for you that will include a payment gateway along with your merchant account. PowerPay understands small business, and they provide superior customer service and competitive pricing. Click here to find out about the special offer they provide for Infusionsoft customers.

Once your PowerPay account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

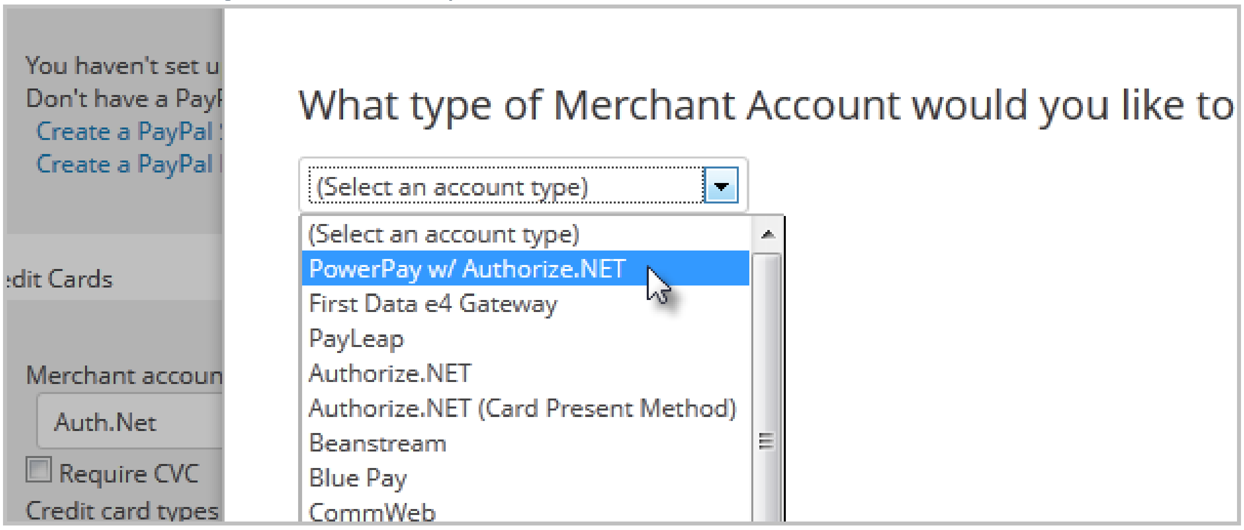
1. Go to **E-Commerce > E-Commerce Setup**
2. Click on **Payment Types** in the Settings menu.



3. Make sure *Process Credit Card Payments* is checked and Click the **Add new...** link.



4. Select **PowerPay** from the drop-down.

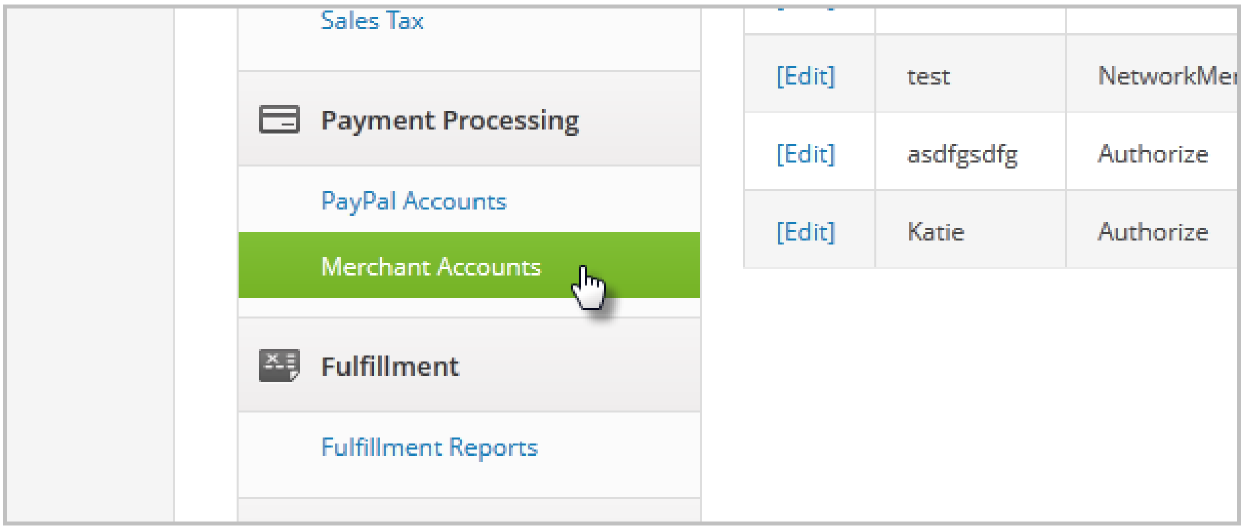


5. Fill in the PowerPay w/ Athorize.NET account information. Some of this information must be obtained from PowerPay.

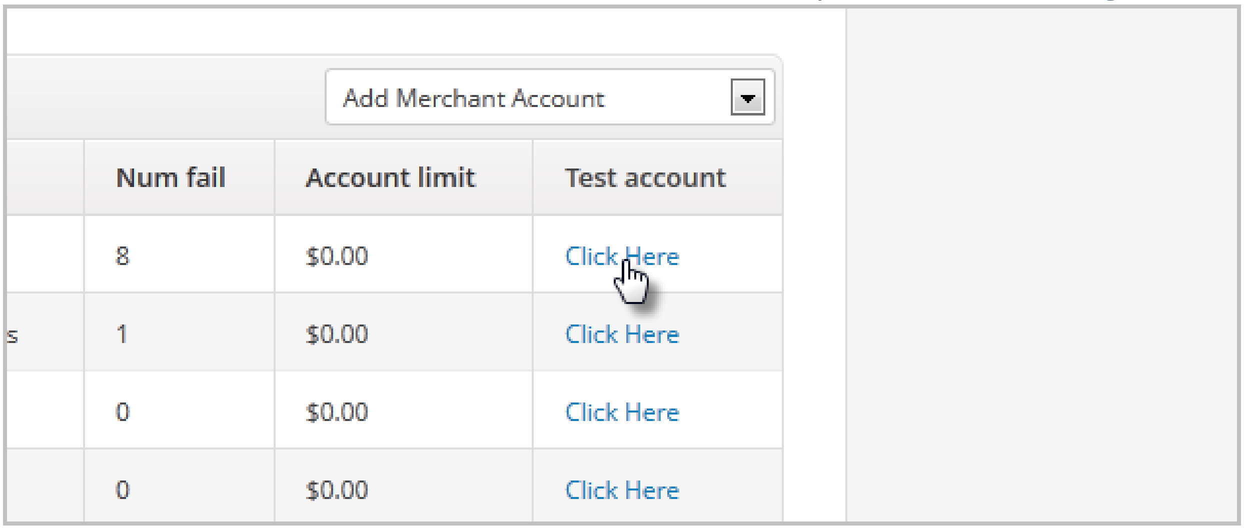
   - **Name**: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g.PowerPay.)
   - **Login ID**: This is provided by PowerPay
   - **Transactional Key**: This is provided by PowerPay
   - (Optional) **Password**: This is your PowerPay account Password.
   - (Optional) **Account Limit**: This field is used to set a maximum charge amount for this particular merchant account.
   - **Test Mode**: Set this to Test Mode when you are testing the integration. Come back and set it to Live Mode before you begin processing orders through this account!
   - **Send Transaction Email**: Set this to Yes if you want to receive a Transaction Email for each purchase in addition to the order notifications Infusionsoft sends to you.

6. Click the **Save** button.

7. Once it is set up, you can test your account by going to **E-Commerce > Settings** and click on **Merchant Accounts**.



8. Go to the *Test Account* column and click on the link to process a test charge.



9. Enter valid billing and credit card information to run a test charge.

10. When the test charge processes successfully, edit the PowerPay account to switch from *Test Mode* to *Live Mode*.

Using a different version of Infusionsoft? Click Here to learn more

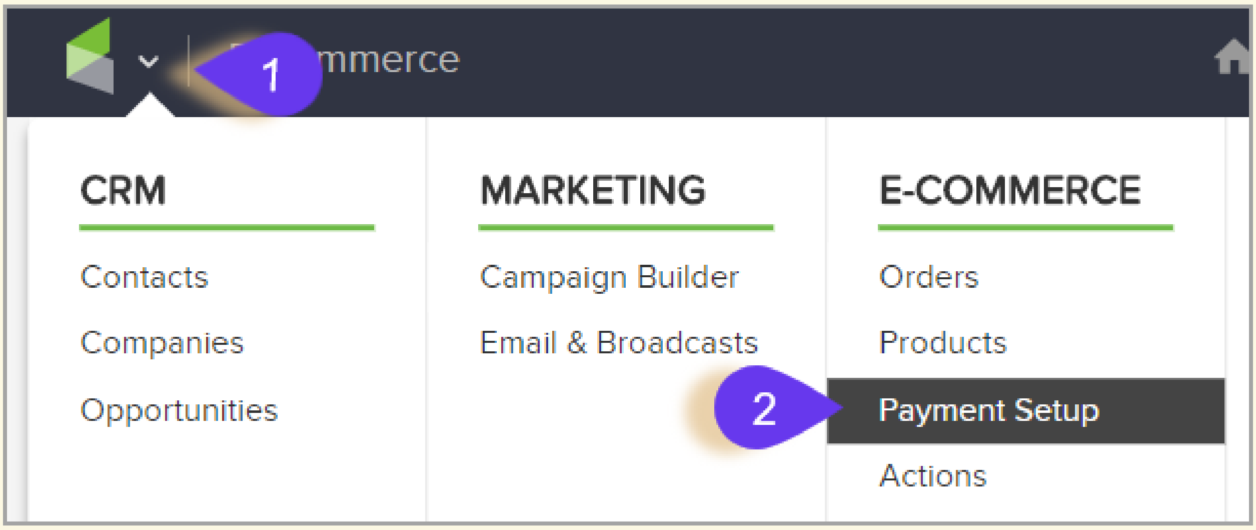
First Data Merchant Account

Last Modified on 08/01/2018 3:10 pm MST

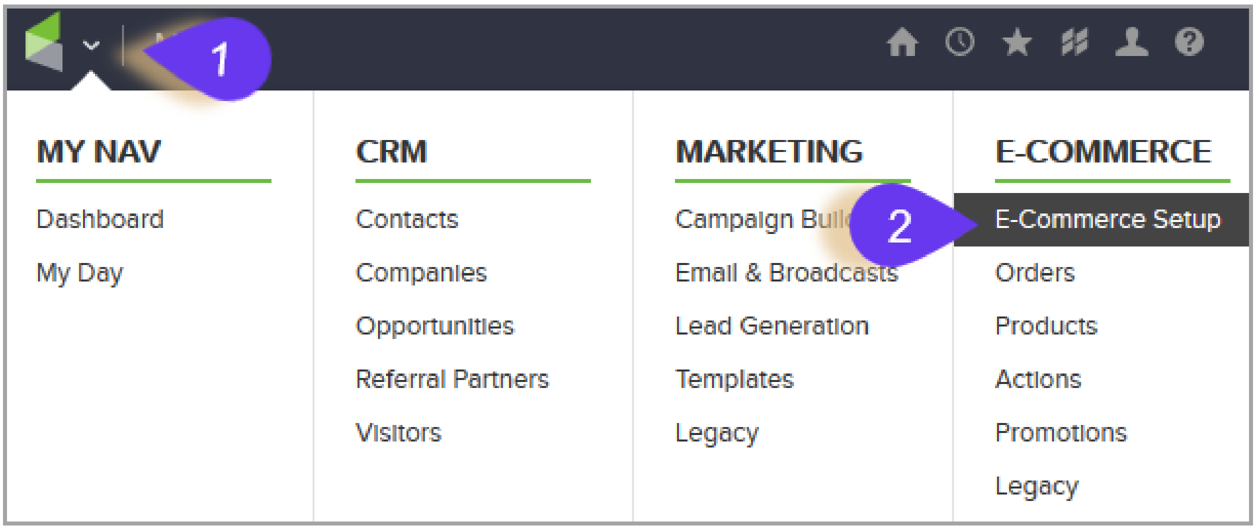
First Data provides merchant account services in the United States. When you integrate with the First Data merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the First Data gateway, they never leave your company website - First Data simply processes payments on the back end. Learn more about First Data .

Once your First Data account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

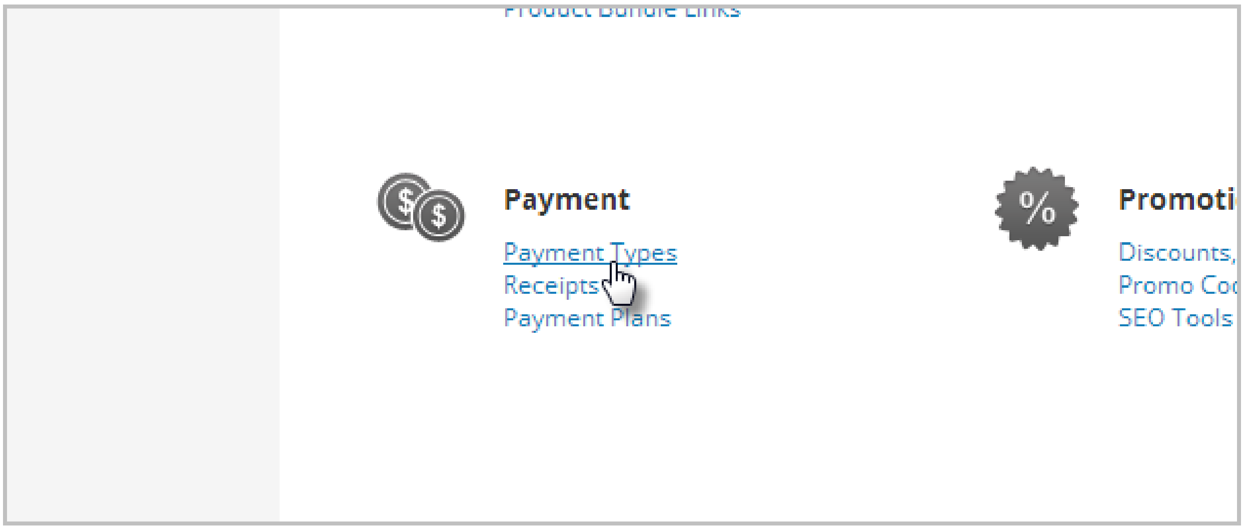
Please Note! If you do not have the shopping cart / order forms plugin, your menu will look similar to the one below. You would go to E-Commerce > Payment Setup



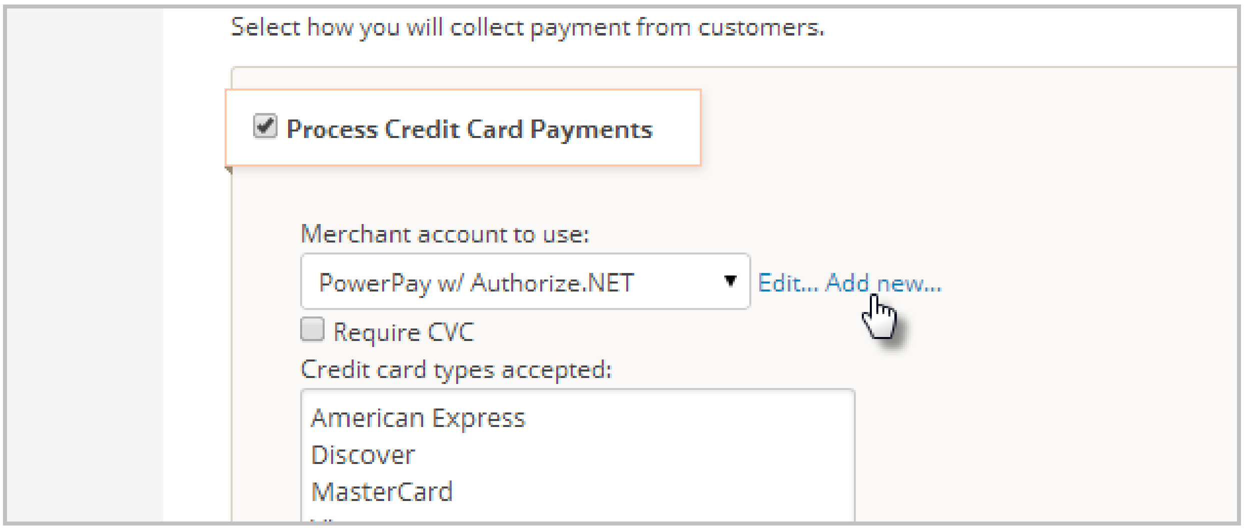
1. Go to **E-Commerce > E-Commerce Setup**



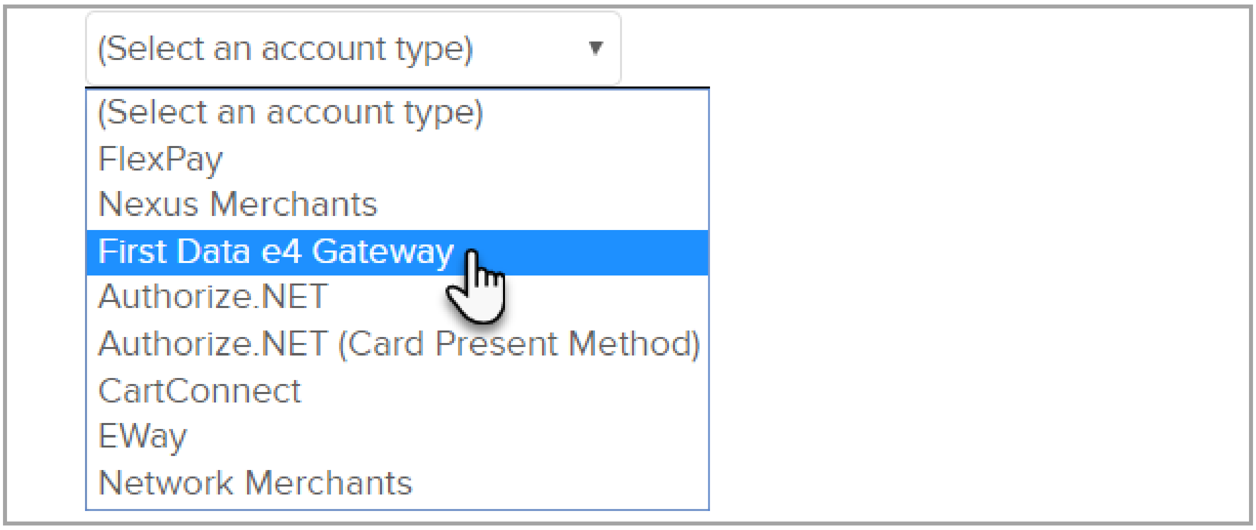
2. Click on **Payment Types**.



3. Click the **Add new...** link to setup your merchant account.



4. Select **First Data e4 Gateway** from the drop-down.



5. Fill in the First Data e4 Gateway account information.
   Some of this information must be obtained from First Data. (Contact First Data Support)
   - Name: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. First Data A.)
   - Exact ID: (Also called, Gateway ID): This is obtained from First Data.
   - Password: This is obtained from First Data.
   - Merchant Store Number: This is assigned by First Data.
   - (Optional) Account Limit: This field is used to set a maximum charge amount for this particular merchant account.

6. From the drop down select "Live Mode". *Make sure to login directly to First Data to make sure the account isn't in Test Mode as well.*

Using a different version of Infusionsoft? Click Here to learn more

Authorize.net Merchant Account

Last Modified on 08/01/2018 3:10 pm MST

Authorize.Net provides merchant account services in the United States. When you integrate with the Authorize.Net merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the Authorize.Net gateway, they never leave your company website - Authorize.Net simply processes payments on the back end.

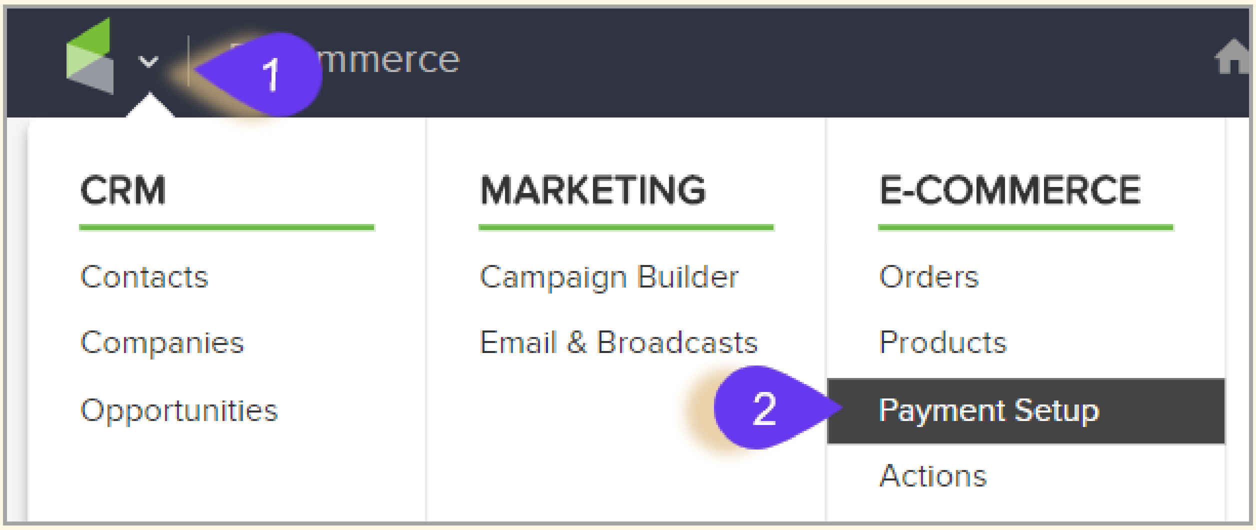
Once your Authorize.Net account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

*Note: If you are processing international payments, you will need to activate this option on your Authorize.Net account through **Account > Address Verification Services**. Un-check the G, U and S fields and then save the changes.*

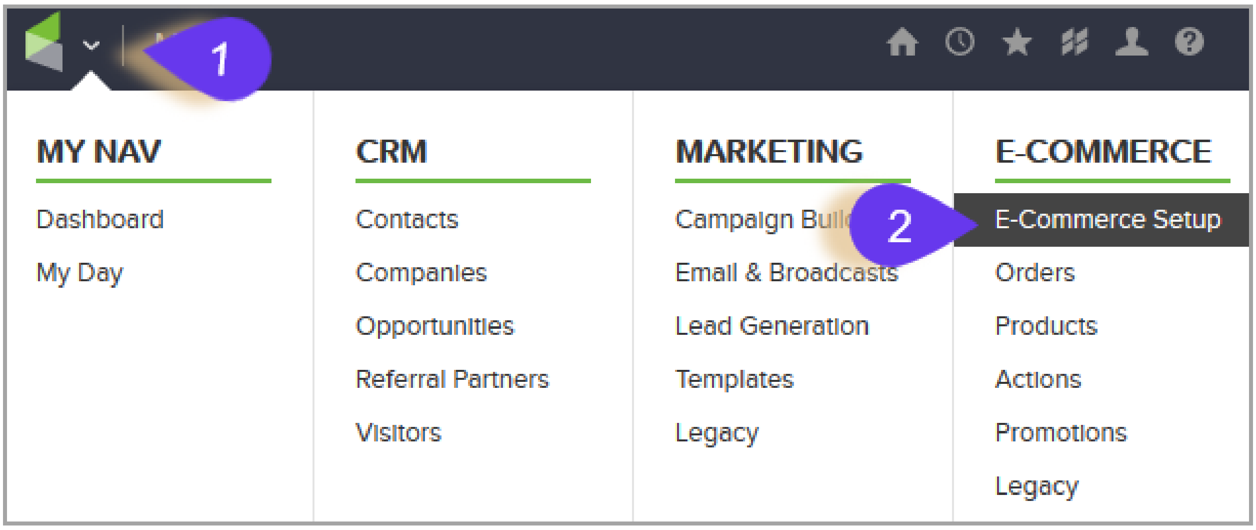
Helpful Authorize.Net Links:

- Useful links when a customer transaction fails.
    - Response Codes look up (type the error code into the search field)
    - Table of common decline reasons
    - Error 11: A duplicate transaction has been submitted (response code 11)
    - Error 13: The merchant login ID or password is invalid or the account is inactive. (response code 13)
    - Error 66: This transaction cannot be accepted for processing. (response code 66)
    - Error 98: This transaction cannot be accepted . (response code 98)
    - Error 123: This account has not been given the permissions required for this request. (response code 123)
    - How Do I Look up Authorize.Net Api Response Codes?

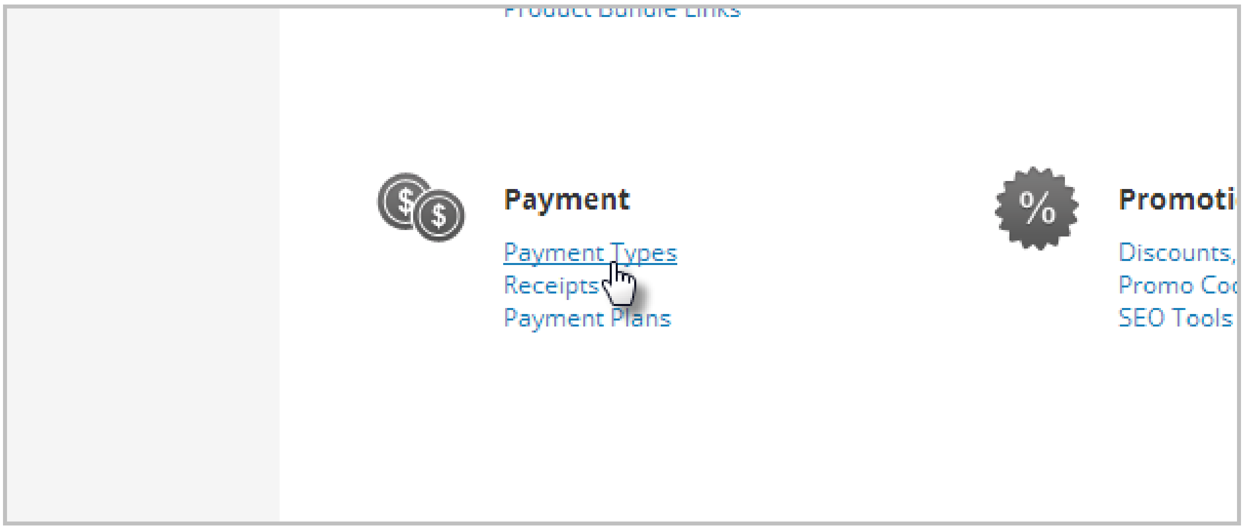
Please Note! If you do not have the shopping cart / order forms plugin, your menu will look similar to the one below. You would go to E-Commerce > Payment Setup



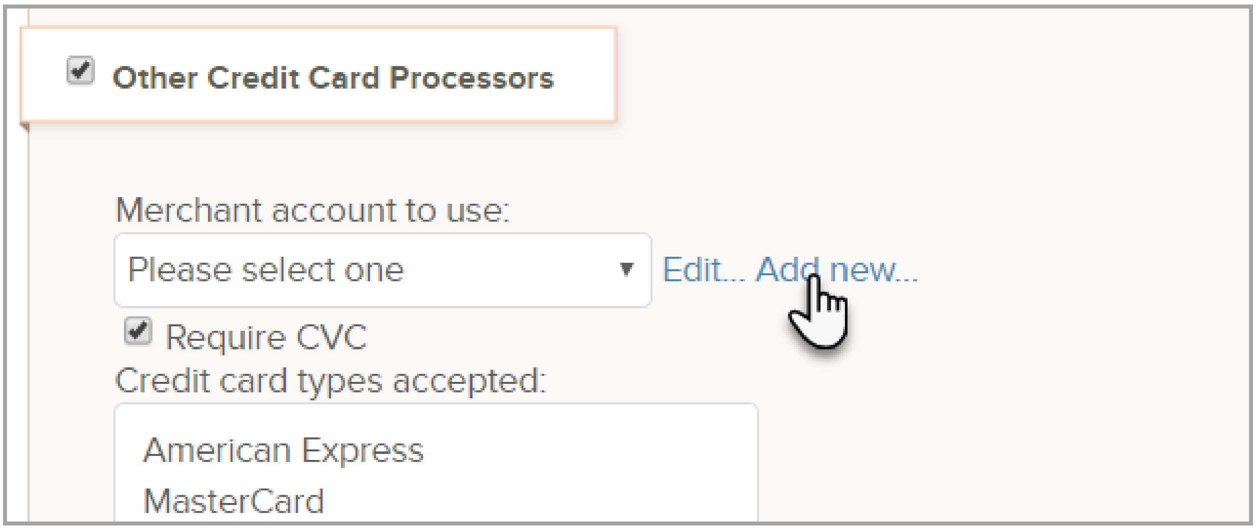
1. Go to **E-Commerce > E-Commerce Setup**



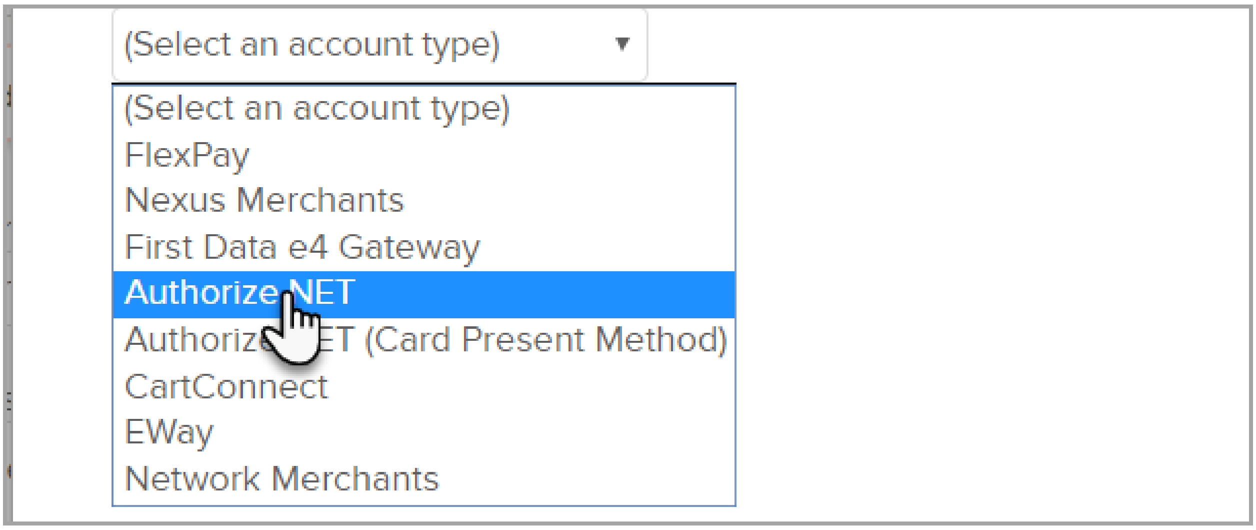
2. Click on **Payment Types**.



3. Check the box next to the credit card icons and click the "**Add new"**



4. Select **Authorize.Net** from the *Merchant Account* drop-down.



5. Fill in the Authorize.NET Account Information and Save your changes. Some of this

information must be obtained from Authorize.net. (Visit the Authorize.Net Support Center .)

- **Name**: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. Authorize.Net A.)
- **Login ID**: This is the API Login ID from Authorize.net. To get this ID.
  - Log into your Authorize.Net account .
  - Select Security Settings from the Settings dropdown menu.
  - Click on API Login ID and Transaction Key.
  - Copy the API Login ID and paste it into the Infusionsoft merchanta account settings.
- **Transaction Key**: You must generate the transaction key through your Authorize.Net account.
- **Test Mode**: Set this to *Test Mode* when you are testing the integration. Come back and set it to *Live Mode* before you begin processing orders through this account. There is also a Test Mode in Authorize.Net that must be disabled before you can successfully process real transactions.
- **Send Transaction Email**: Set this to *Yes* if you want to receive a transaction email from Authorize.Net for each purchase in addition to the order notifications Infusionsoft sends to you.
- Click **Save** when finished

6. Check the **Credit Card** check box again.

7. Select your new Authorize.Net merchant account from the drop-down and **save** your changes.

Using a different version of Infusionsoft? Click Here to learn more

Authorize.net Card Present Merchant Account

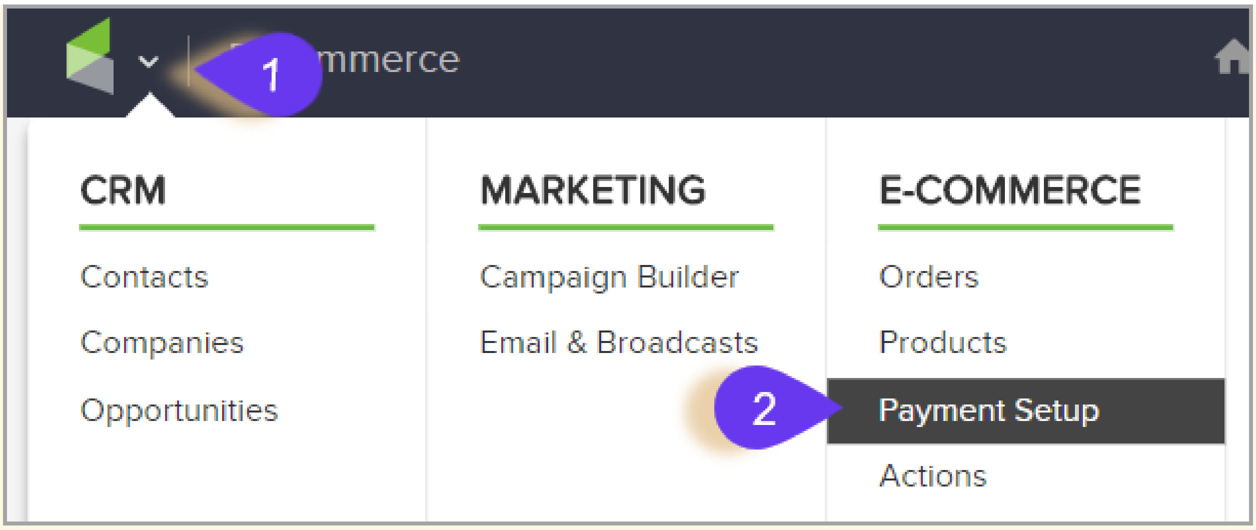
Last Modified on 08/01/2018 3:11 pm MST

Authorize.Net provides merchant account services in the United States. When you integrate with the Authorize.Net merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the Authorize.Net gateway, they never leave your company website - Authorize.Net simply processes payments on the back end.

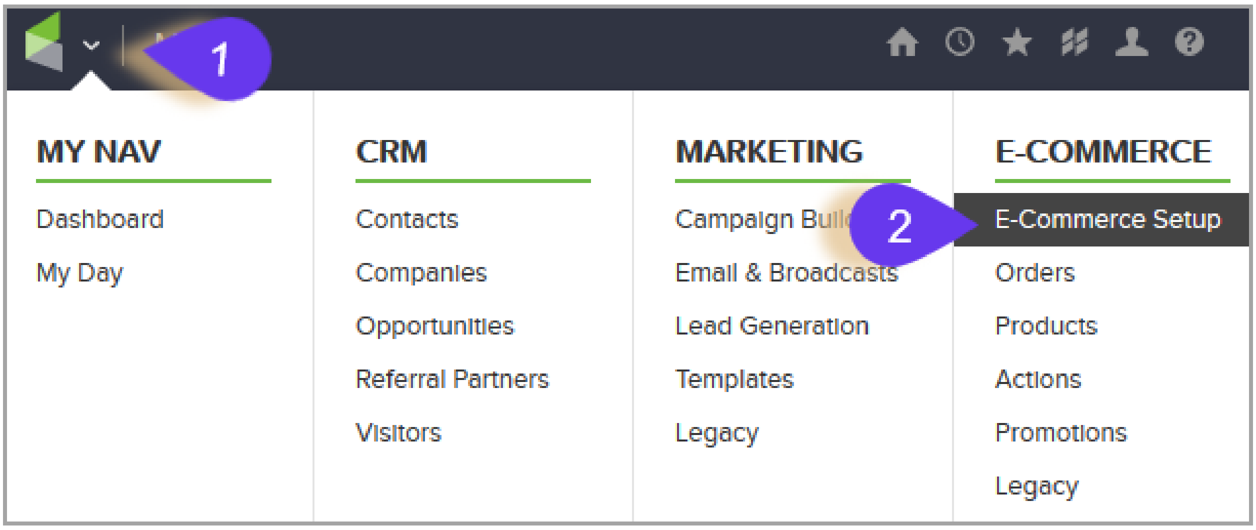
Once your Authorize.Net account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

Note: If you are processing international payments, you will need to activate this option on your Authorize.Net account through ***Account > Address Verification Services****. Uncheck the G, U and S fields and then save the changes.*

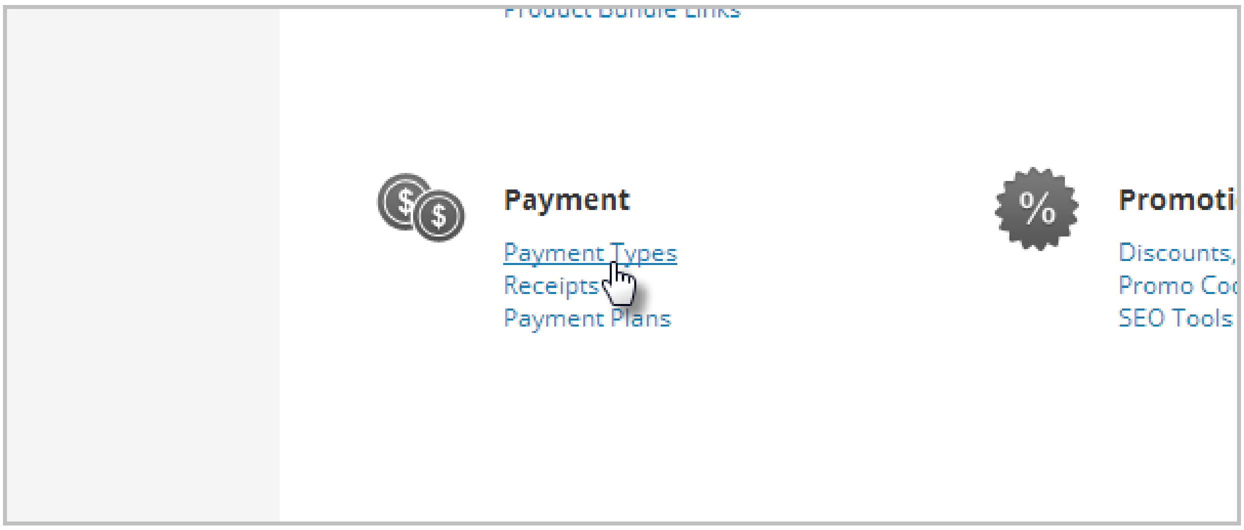
Please Note! If you do not have the shopping cart / order forms plugin, your menu will look similar to the one below. You would go to E-Commerce > Payment Setup



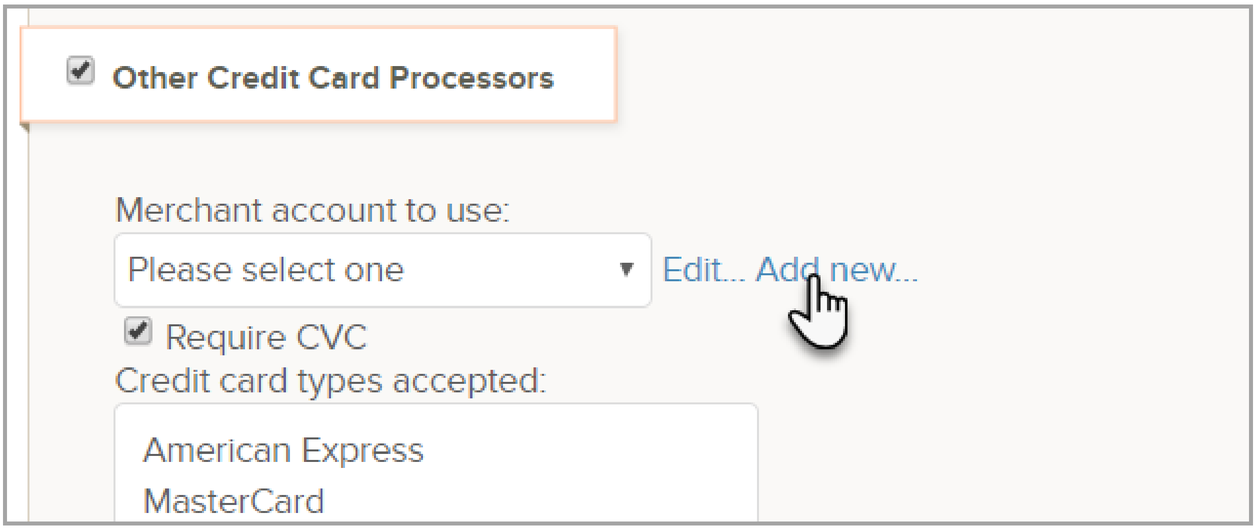
1. Go to **E-Commerce > Settings**



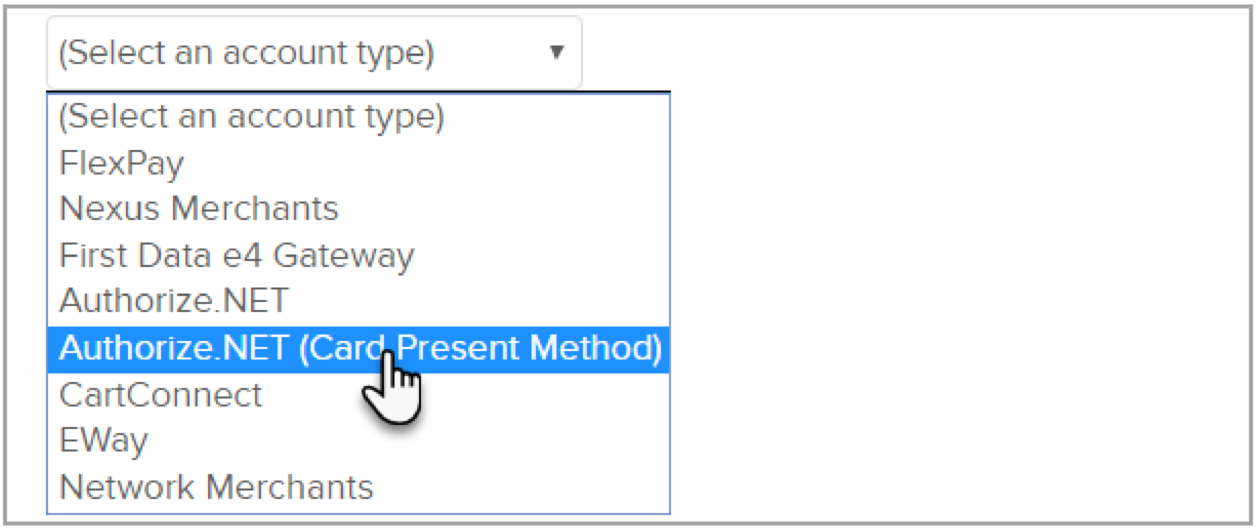
2. Click on Payment Types.



3. Check the box next to the credit card icons and click the "**Add new"**



4. Select **Authorize.Net (Card Present Method)** from the Merchant Account drop-down



5. Fill in the Authorize.Net Card Present Account Information.
   Some of this information must be obtained from Authorize.net. (Visit the Authorize.Net Support Center .)
   - **Name**: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. Authorize.Net A.)
   - **Login ID**: This is the API Login ID from Authorize.net. To get this ID:
     - Log into your Authorize.Net account .
     - Select Security Settings from the Settings dropdown menu.
     - Click on API Login ID and Transaction Key.
     - Copy the API Login ID and paste it into the Infusionsoft merchant account

settings.

- **Transaction Key**: You must generate the Transaction Key through your Authorize.Net account.
- (Optional) **Account Limit**: This field is used to set a maximum charge amount for this particular merchant account.
- **Device Type:** Select a device type from the dropdown that represents the place where the order will originate. *Note: Custom API integration is required for any method other than the Infusionsoft Shopping Cart or order forms.*
- **Test Mode**: Set this to Test Mode when you are testing the integration. Come back and set it to Live Mode before you begin processing orders through this account. There is also a Test Mode in Authorize.Net that must be disabled before you can successfully process real transactions.
- **Send Transaction Email**: Set this to Yes if you want to receive a Transaction Email from Authorize.Net for each purchase in addition to the order notifications Infusionsoft sends to you.
- Click **Save** when finished

6. Check the Credit Card check box again.

7. Select your new Authorize.Net merchant account from the drop-down and save your changes.

Using a different version of Infusionsoft? Click Here to learn more

eWAY Merchant Account

Last Modified on 08/01/2018 3:11 pm MST

eWAY provides merchant account services in Australia. When you integrate with the eWAY merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the eWAY gateway, they never leave your company website - eWAY simply processes payments on the back end.

Once your eWAY account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

1. Go to **E-Commerce** > **Settings**

2. Click on **Merchant Accounts** in the settings menu.

3. Select **eWAY** from the Merchant Account drop-down.

4. Fill in the eWAY Account Information.
   Some of this information must be obtained from eWAY (contact eWAY Support to request assistance.)
   - **Name**: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. eWAY A.)
   - **Customer ID**: This is your eWAY Customer ID.
   - **Username**: eWAY has provided instruction on how to obtain this information.
   - **Password**: eWAY has provided instruction on how to obtain this information.
   - (Optional) **Account Limit**: This field is used to set a maximum charge amount for this particular merchant account.
   - **Test Mode**: Set this to Test Mode when you are testing the integration. Come back and set it to Live Mode before you begin processing orders through this account.

5. Click **Save**.

6. Go to the *Test Account* column and click on the link to process a test charge.

7. Enter valid billing and credit card information to run a test charge.

8. When the test charge processes successfully, edit the eWAY account to switch from *Test Mode* to *Live Mode*.

Using a different version of Infusionsoft? Click Here to learn more

Network Merchants (NMI) Merchant Account

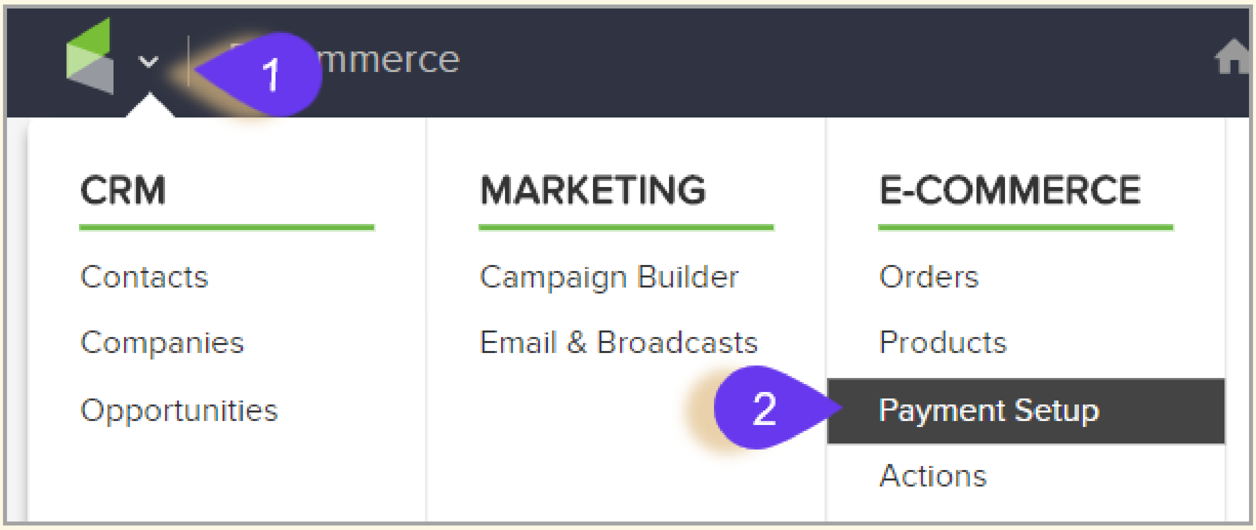
Last Modified on 08/01/2018 3:11 pm MST

Network Merchants provides merchant account services in the United States. When you integrate with the NMI merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the NMI gateway, they never leave your company website - NMI simply processes payments on the back end.

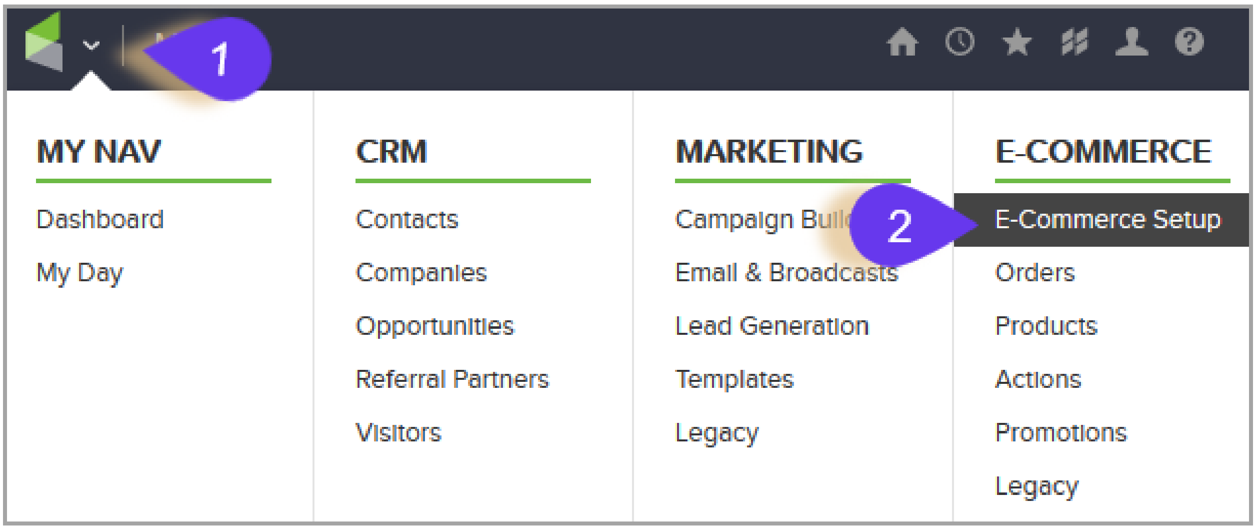
Once your Network Merchants account is approved and activated, you will need to integrate it with the Infusionsoft E-Commerce component.

If you are receiving transaction errors on your orders, please take a look at Network Merchant's error codes and contact them as soon as possible.

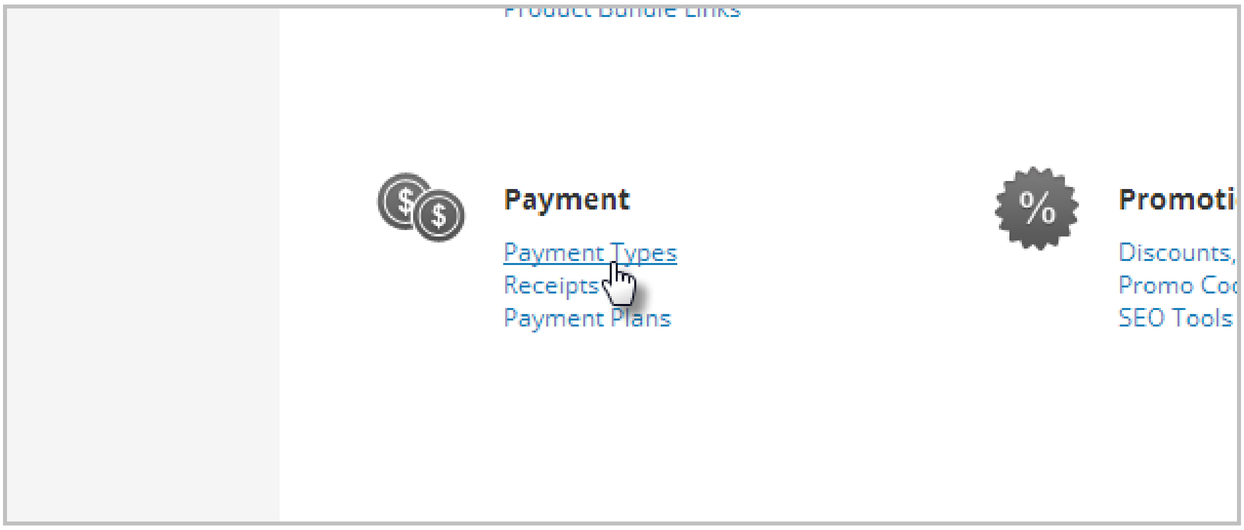
Please Note! If you do not have the shopping cart / order forms plugin, your menu will look similar to the one below. You would go to E-Commerce > Payment Setup



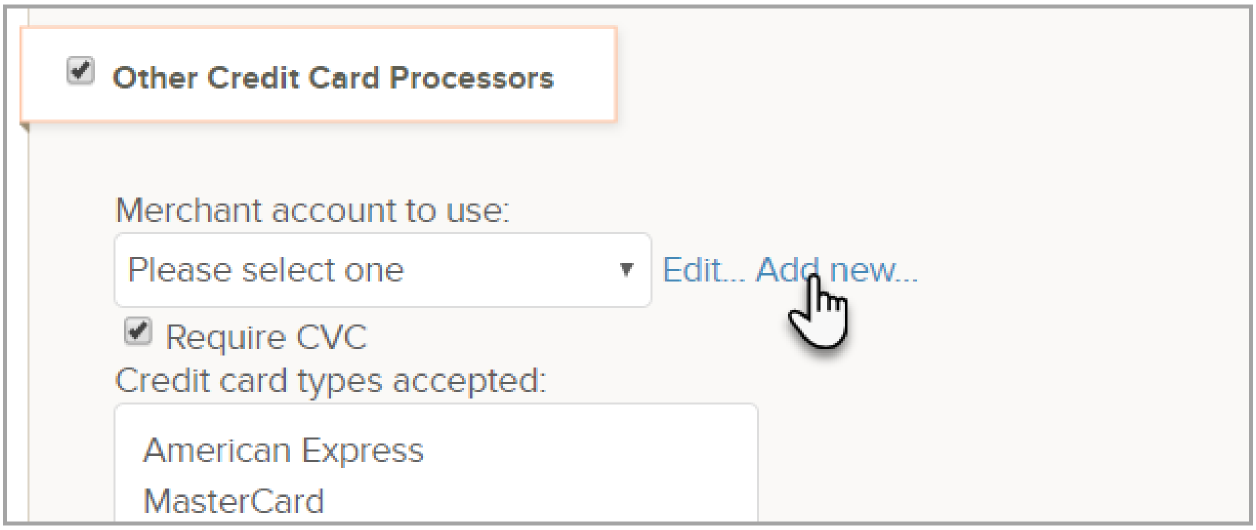
1. Go to **E-Commerce > E-Commerce Setup**



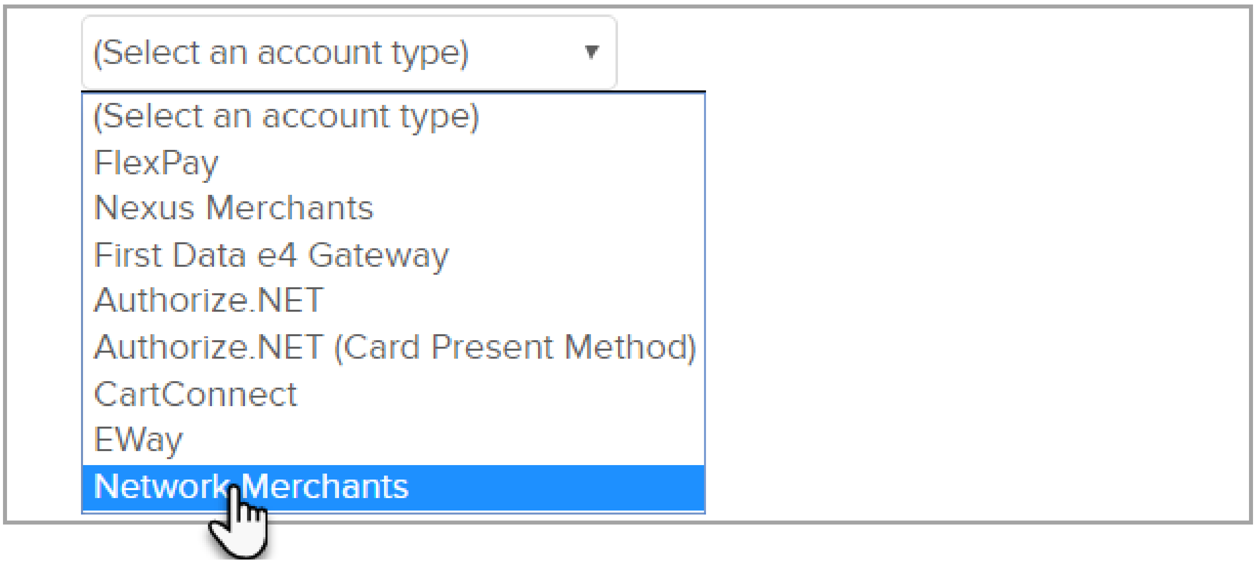
2. Click on **Payment Options** in the settings menu.



3. Click the **Add new...** link to setup your merchant account.



4. Select Network Merchants from the Merchant Account drop-down.



5. Fill in the Network Merchants Account Information.
   Some of this information must be obtained from NMI (Contact NMI Support .)
   - **Name**: The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. NMI)
   - **Username**: Enter the Username you use to access your NMI account .
   - **Password**: Enter the Username you use to access your NMI account.
   - (Optional) **Account Limit**: This field is used to set a maximum charge amount for this particular merchant account.
   - **Test Mode**: Set to Test Mode by default when you are ready set it to Live Mode before you begin processing orders through this account.
   - Click **Save** when finished

6. Check the **Credit Card** check box again.

7. Select your new **Network Merchants** merchant account from the drop-down and **save** your changes.

Using a different version of Infusionsoft? Click Here to learn more

Nexus Merchants Integration

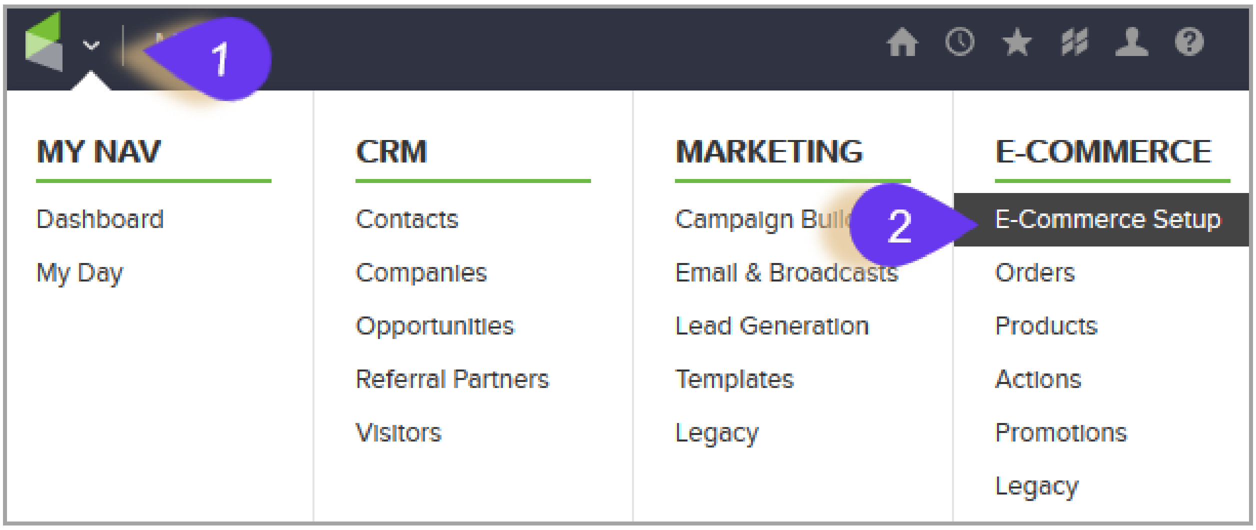
Last Modified on 08/01/2018 3:12 pm MST

Nexus Merchants provides a bridge with popular merchant accounts such as Stripe and Braintree. When you integrate an account with the Nexus Merchants merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscriptions or payment plans.

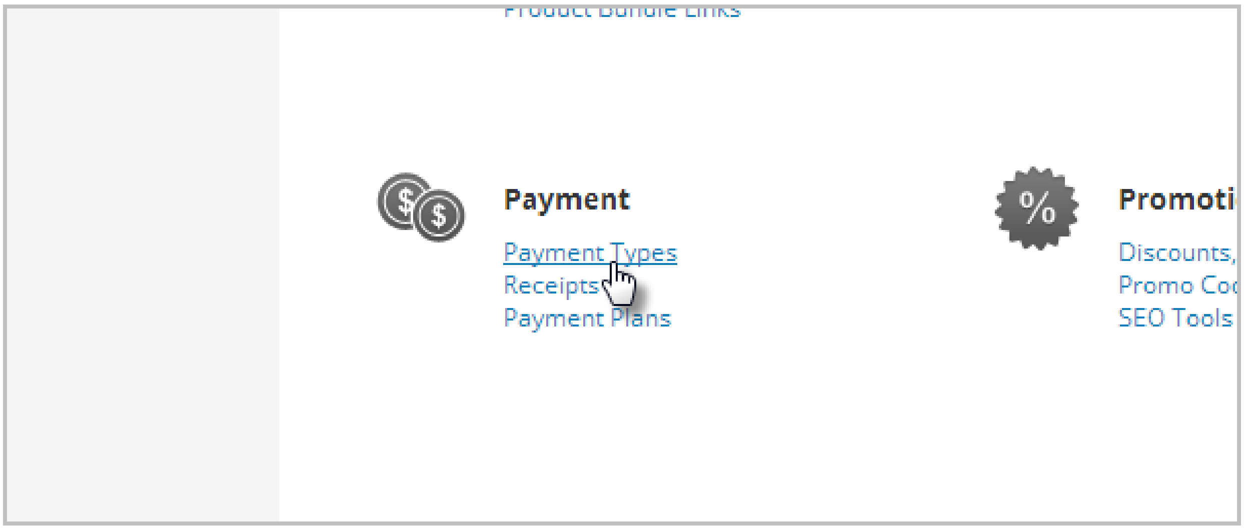
You can refund and void payments within Infusionsoft without having to log into the merchant account to complete the process.

Once you have set up your Nexus Merchant account and added your Stripe or Braintree keys to the system, you will need to integrate it with the Infusionsoft E-Commerce component.

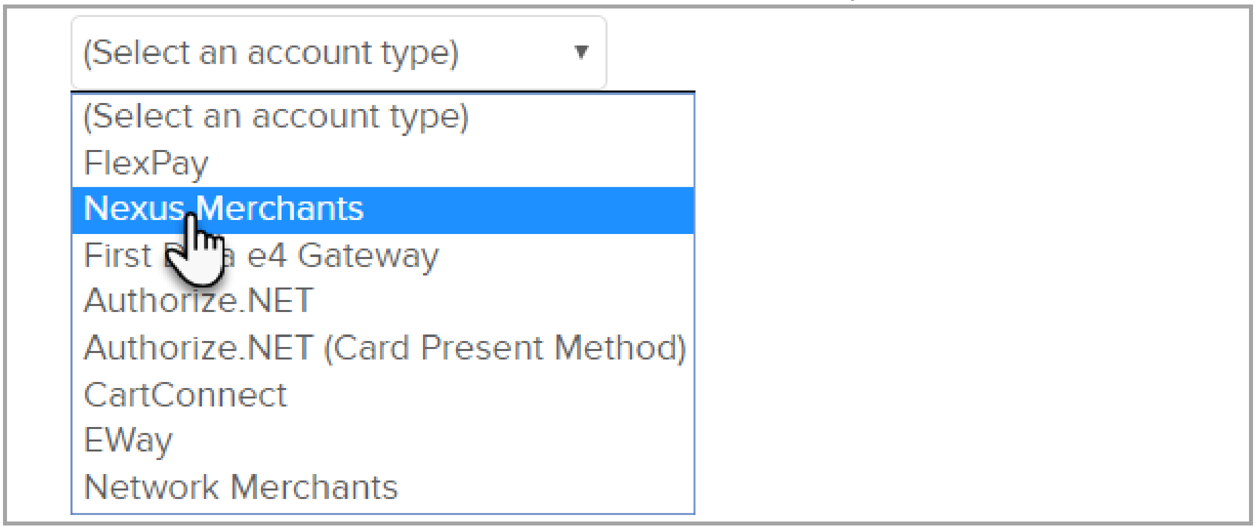
1. Go to **E-Commerce** > **E-Commerce Setup**



2. Click on **Payment Types**.



3. Select **Nexus Merchants** from the Merchant Account drop-down



4. Fill in the following Nexus merchant account information
   - **Name:** The name should be short and descriptive. It is used to identify this merchant account in various lists throughout Infusionsoft (e.g. Nexus Merchants)
   - **Username:** This is the username used to access your Nexus Merchants account
   - **Password:** This is the password used to access your Nexus Merchants account
   - Click **Save**

5. Check the **Credit Card** check box again.

6. Select your new Nexus merchant account from the drop-down and **save** your changes.

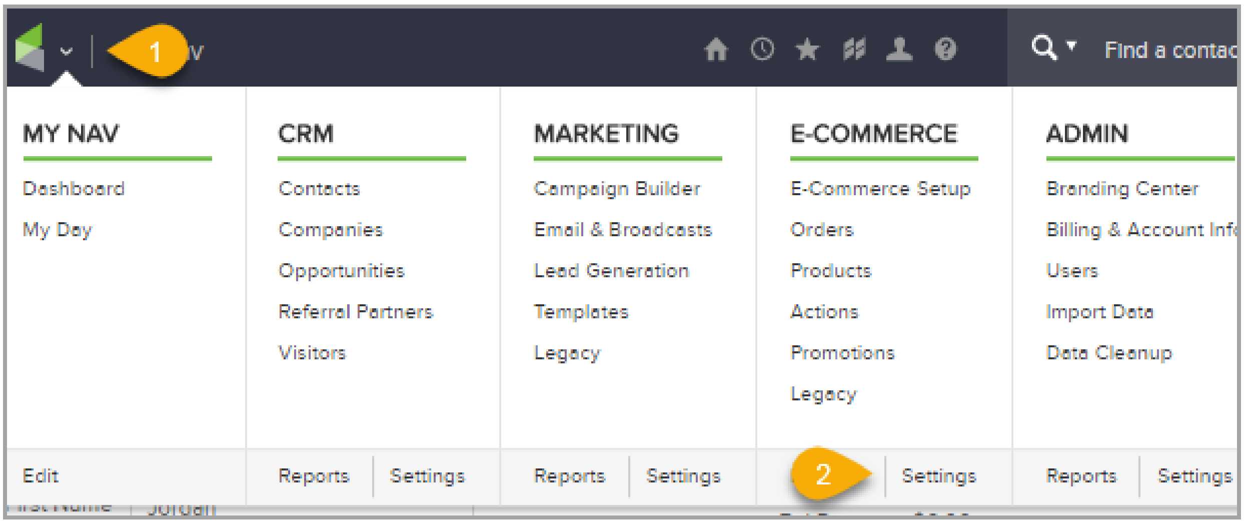
Using a different version of Infusionsoft? Click Here to learn more

How to locate your Merchant Account ID

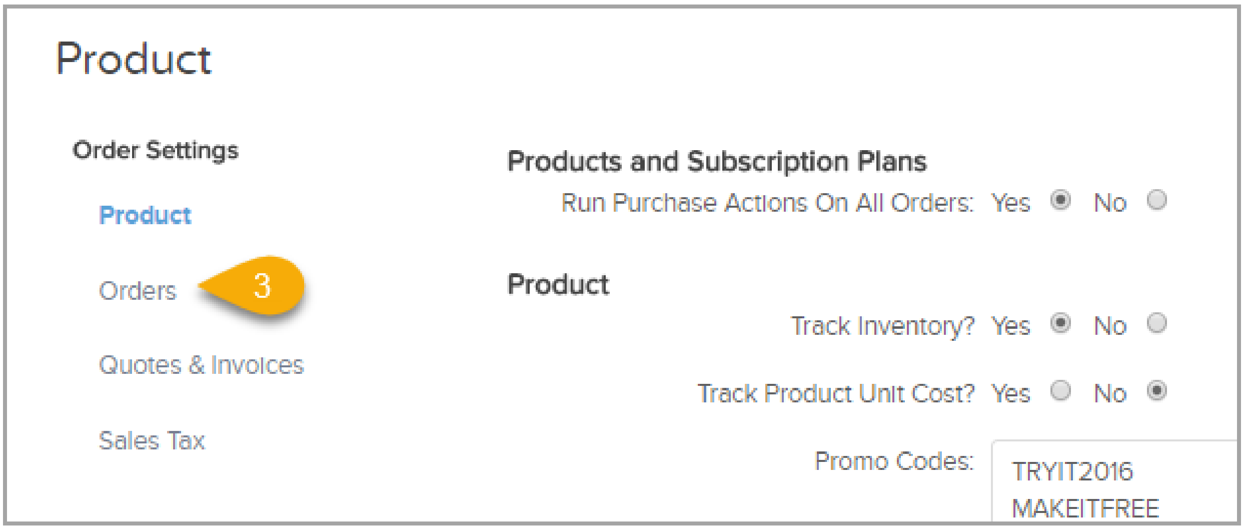
Last Modified on 08/01/2018 3:12 pm MST

To connect your online store to your Merchant Account that is setup within Infusionsoft, you will need your Merchant ID. Here are the steps to locate your Merchant ID.

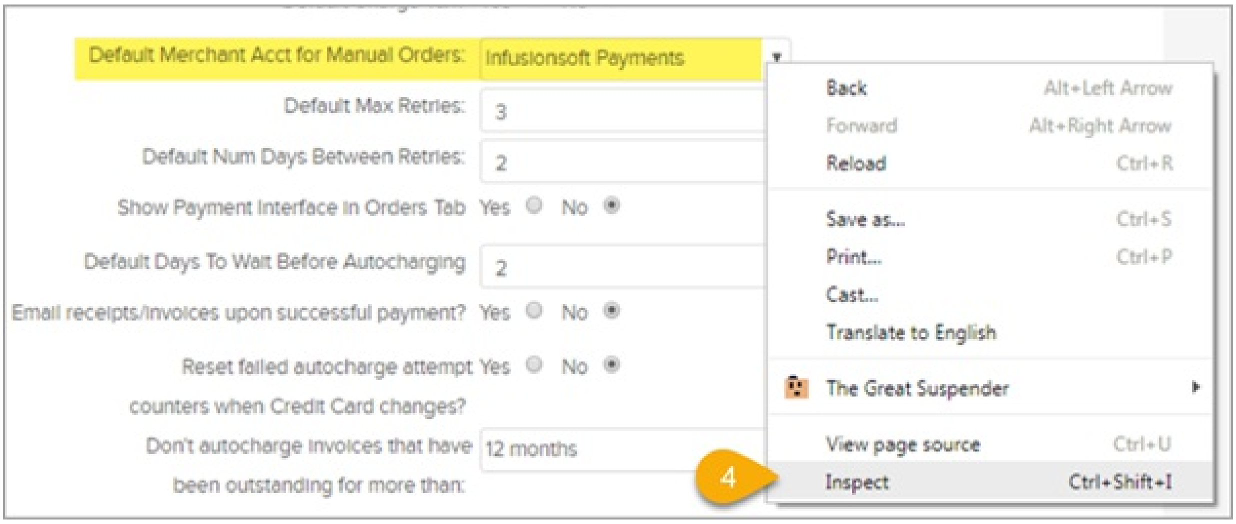
1. Go to **E-Commerce** > **Settings**



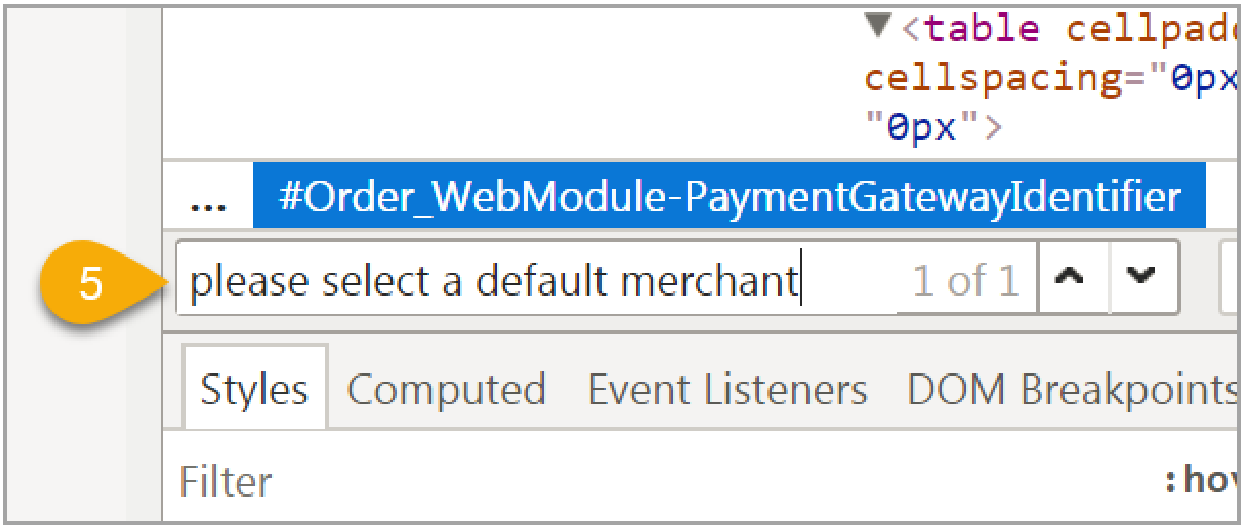
2. Click **Orders** from Left hand menu



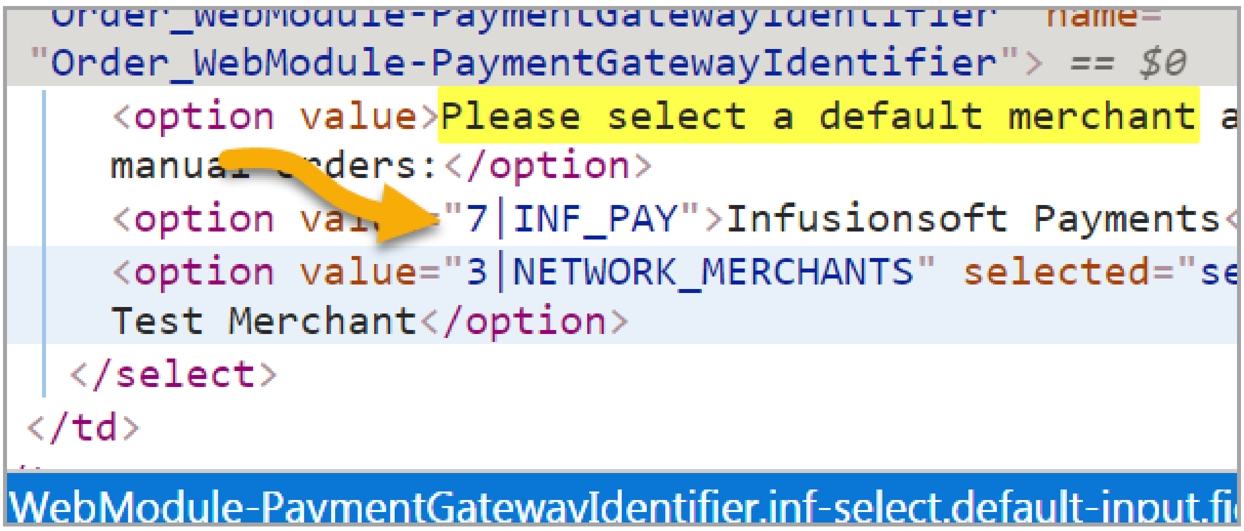
3. Right click on the drop down located next to **Default Merchant Acct for Manual Orders**



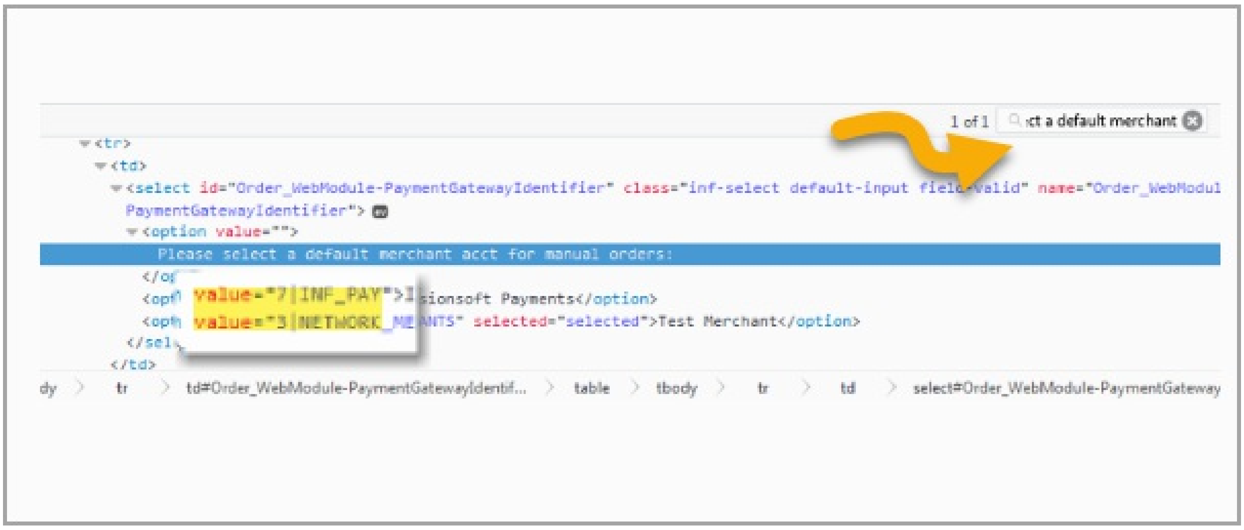
4. If you are using Chrome the from your keyboard use **Ctrl+F** > in the Search field type "**please select a default merchant**"



5. User the number that is to the left of your Merchant



6. In Firefox you would follow the exact steps as listed above but the search is there automatically.


1 of 1
ct a default merchant
<tr>
<td>
<select id="Order_WebModule-PaymentGatewayIdentifier" class="inf-select default-input field-valid" name="Order_WebModul
PaymentGatewayIdentifier">
<option value="">
Please select a default merchant acct for manual orders:
value="7|INF_PAY">
sionsoft Payments</option>
value="3|NETWORK_ME
NTS" selected="selected">Test Merchant</option>
</td>
dy
tr
td#Order_WebModule-PaymentGatewayIdentif...
table
tbody
tr
td
select#Order_WebModule-PaymentGateway

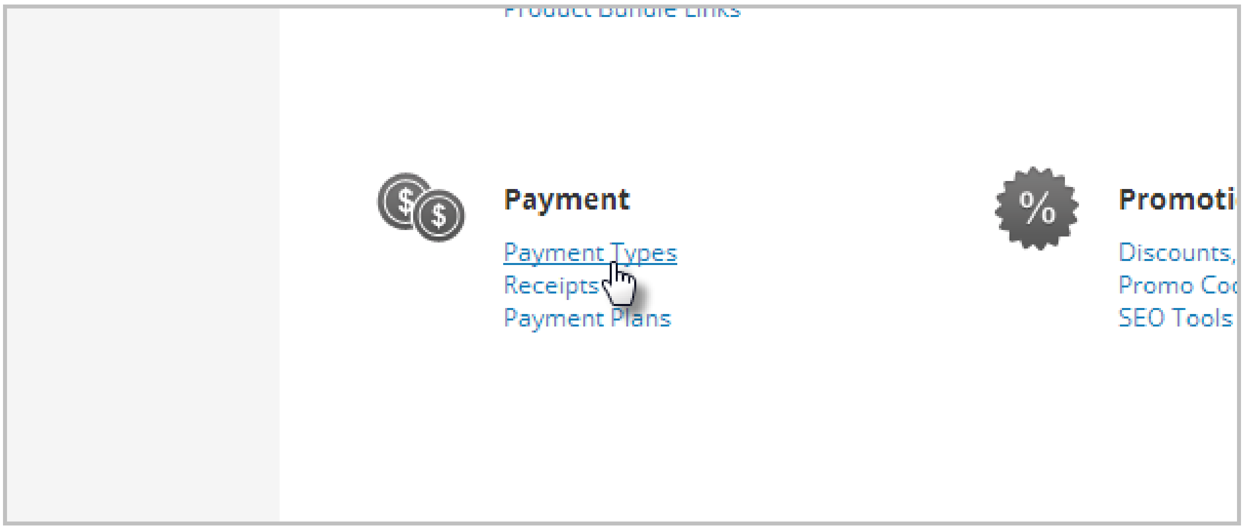
Using a different version of Infusionsoft? Click Here to learn more

FlexPay Merchant Account

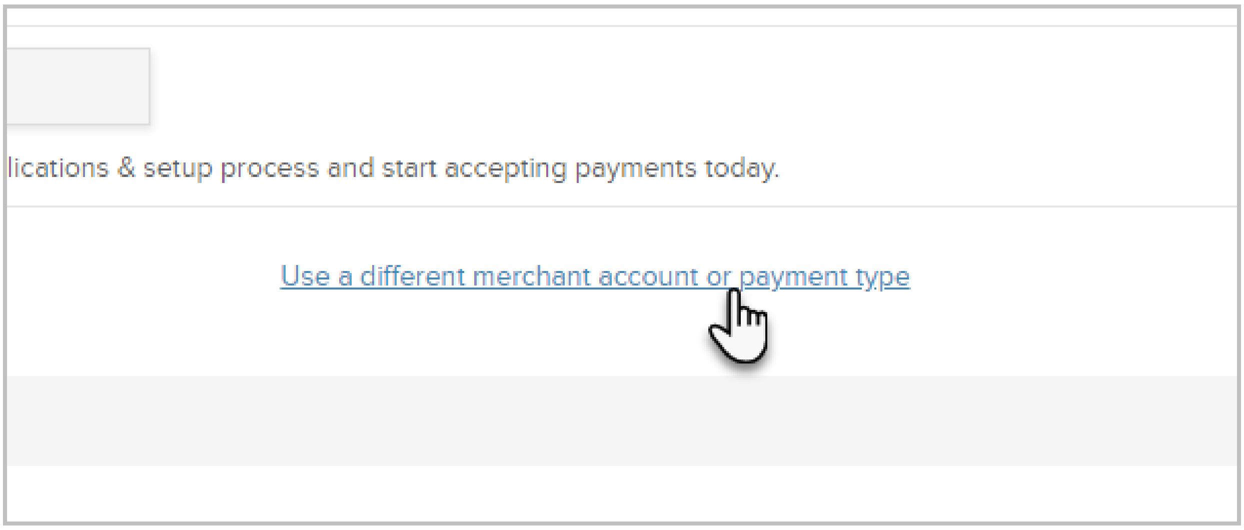
Last Modified on 08/01/2018 3:12 pm MST

FlexPay helps to mitigate credit card declines by using AI-Driven machine learning to figure out the best time, transit, and testing process to handle your transactions. It acts as a bridge between Infusionsoft and over 100 supported payment processors .

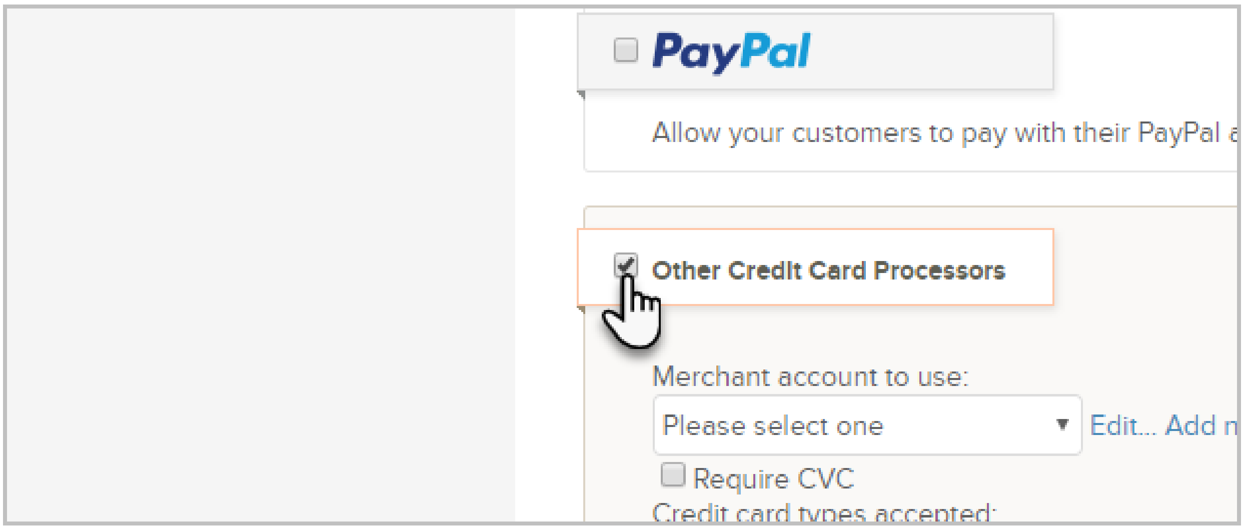
1. Sign up for a FlexPay account
2. Once you have your account set up, you'll need to generate an API key .
3. Sign in to your Infusionsoft account and go to **E-Commerce** > **E-Commerce Setup** > **Payment Types**



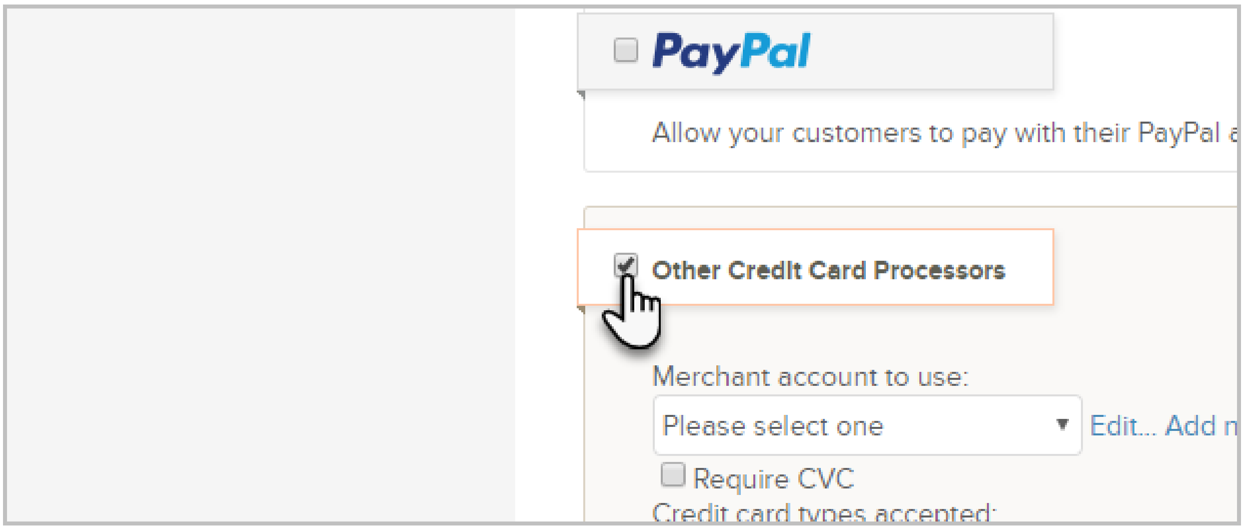
4. (Optional) Click the link to view other payment methods if you only see the Infusionsoft Payments option



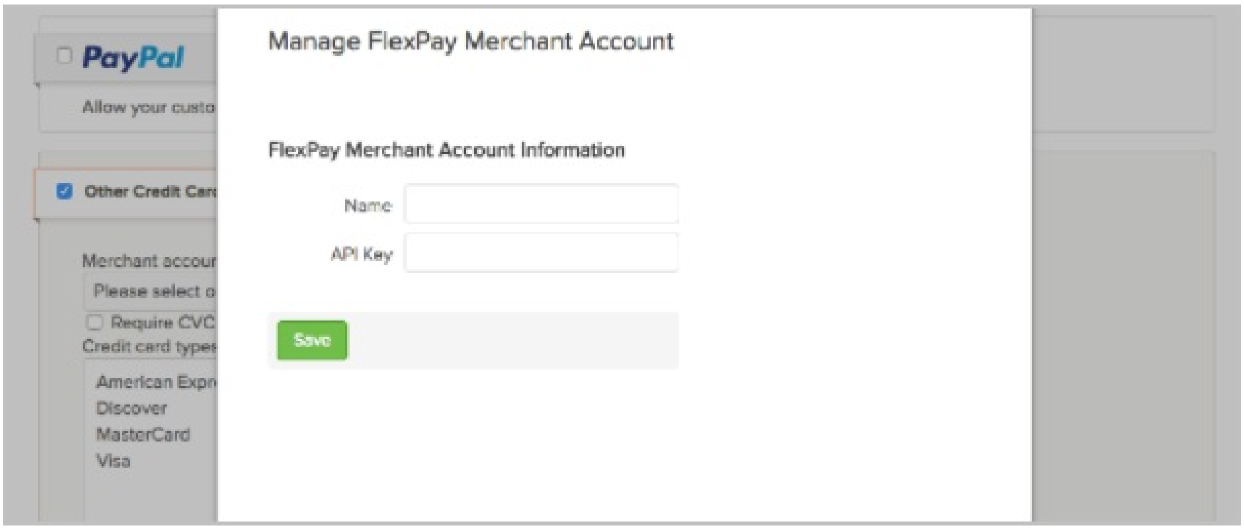
5. Check the **Other Credit Card Processors** checkbox



6. Click **Add new...** and select **FlexPay Merchant Account** from the list



7. Give it an internal name (e.g., "FlexPay"), enter your API key and click **Save**.



8. It's recommended to check out this article and go over the default billing settings before you start charging cards.

Using a different version of Infusionsoft? Click Here to learn more

Sage Pay IP Address Update

Last Modified on 08/09/2018 10:47 am MST

Infusionsoft data is being migrated to the Google Cloud, resulting in a change to Infusionsoft's IP addresses. For Sage Pay users, in order to continue transacting with Sage Pay, they'll need to make a quick update to their account.

Prior to 28, September 2018, they will need to add 3 new IP addresses to their Sage Pay account. The simple process is explained below.

Logging into your My Sage Pay

Before you can add any IP addresses to your account you will first need to login to your MySagePay admin panel as a user with administrative rights.

You can login to either Test MySagePay or Live MySagePay to add your IP addresses.

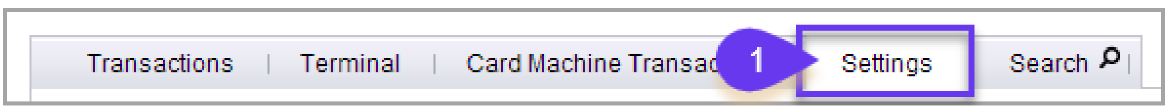
Any IP addresses that are added onto your Test account will not be carried over to your Live account. Also any IP addresses added to Live will not transfer over to test.

If you would like to add an IP address to both Test and Live you will need to log into each MySagePay and enter the IP address manually.

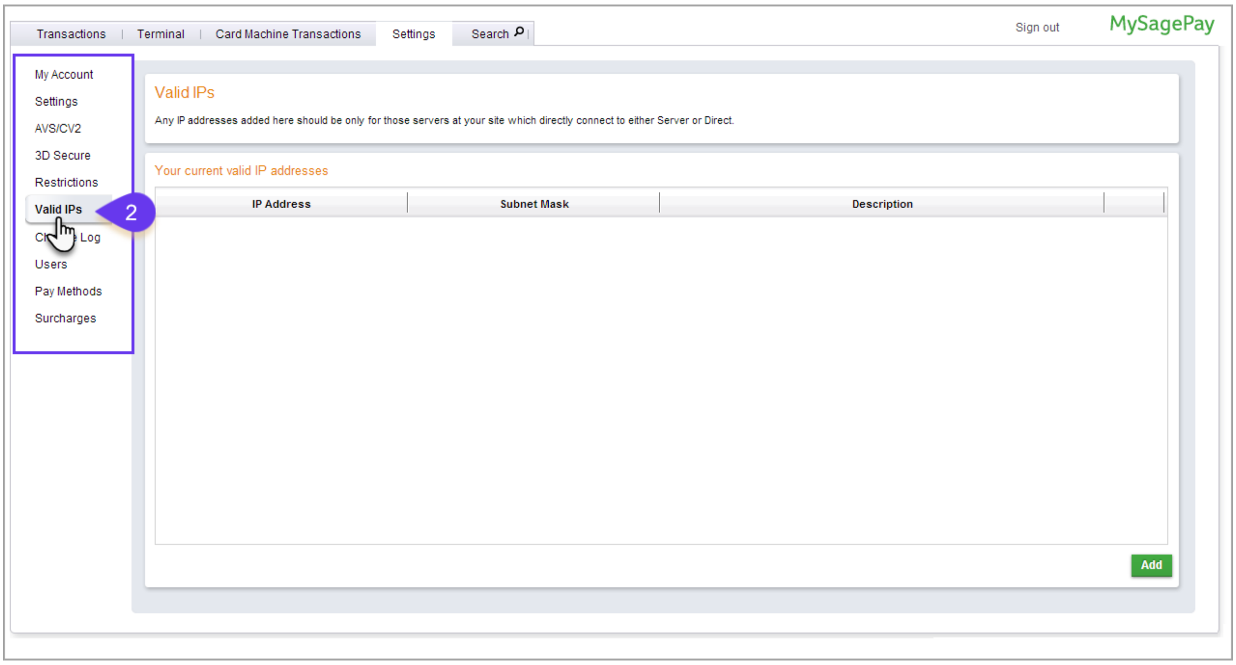
Adding your IP Address

Now that you have logged into your MySagePay you are ready to add your IP address.

1. The first thing you will need to do is select the "Settings" section from the menu at the top of the page.



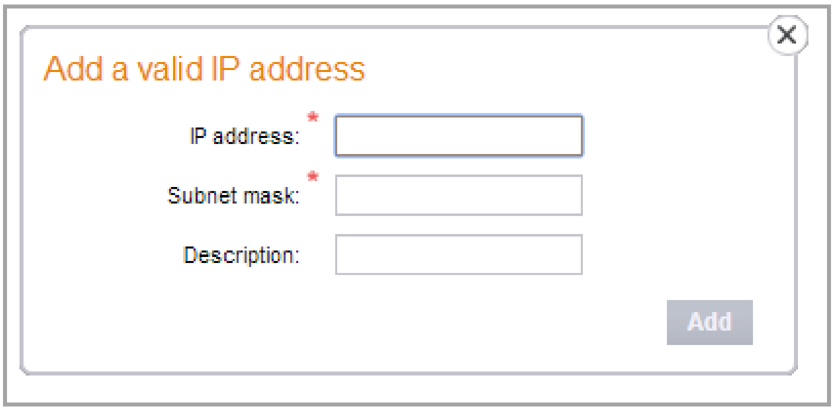
2. Once you have done this you will see a list of options presented down the left hand panel of the screen. Select “Valid IPs” from the list and you will be taken to the IP page.



3. You can then select the “Add” button to enter the IP address you would like to add to your account.

   - Add ALL of the following IP Addresses:
     - 035.230.122.40
     - 035.230.122.41
     - 035.230.122.42

Note: You should not remove the IP addresses that you already have on your account.



4. When you add an IP address to your SagePay account you will also need to enter a Subnet Mask.
5. The subnet mask tells the Sage Pay systems what to accept when a post is received from your IP address.
6. Add the following subnet mask to each of the 3 IP addresses listed above
    - 255.255.255.255
7. Click "Add" and repeat until all 3 IP addresses have been added to the Whitelist.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments FAQ

Last Modified on 08/01/2018 3:13 pm MST

Infusionsoft Payments Overview

- **Fast setup and easy to use**: Getting paid shouldn't be stressful – Infusionsoft Payments makes it simple. Signing up is easy and stress-free (and takes about 10 minutes). Most customers will be approved and able to accept credit cards in minutes.

- **Transparent pricing**: Just because you're a small business owner, doesn't mean you should be charged more. Infusionsoft Payments charges a low, flat rate of 2.9% + $.30 per transaction. Funds typically clear within 48 hours. You even have the option to decide how frequently you would like your funds to be deposited. No hidden fees and no surprises mean more of your hard-earned money stays in your pocket.

- **Integrated and painless payment processing**: Tired of calling two different companies for support issues? Infusionsoft Payments is seamlessly integrated, from setup to support. So, whether you work out of the office or on the road, you can stop stressing about when and how you're going to get paid – and get back to running your business.

Questions about signing up

How do I sign up for Infusionsoft Payments? Navigate to the E-commerce Setup page from the the main menu, and click on the **Payment Types** link in the Payments section. At the top of the Payment Types page you will see the Infusionsoft Payments section where you can sign up for Infusionsoft Payments. Full walk through here .

Is Infusionsoft Payments available in my country? Infusionsoft payments is currently only accepting new customers with bank accounts in the United States, the United Kingdom and Canada.

Who is eligible to sign up for Infusionsoft Payments? Any admin user in your Infusionsoft account can sign up for Infusionsoft Payments. The person who signs up must be a financial representative of your company and must be an account holder on the bank account you plan to receive your funds into.

Why do I need to provide my Social Security number? We are required by law to to collect and verify certain information about our customers.

I'm using Infusionsoft Payments for my business, why do I have to provide my personal information? We require you to provide personal information such as your Social Security number and date of birth to confirm that you're authorized to act on behalf of the business. This prevents unauthorized people from creating an account on behalf of your business.

Is my information safe? Absolutely yes! Protecting your information and your privacy is above and beyond our top priority. We encrypt and store all sensitive information in a PCI Compliant environment.

Will this affect my taxes? Under certain conditions, we may be required to provide you and the IRS with an informational record of your payments. It's up to you and a tax professional to determine how payments you receive using Infusionsoft Payments should be reported to the IRS. Learn more about tax reporting.

What's an EIN? An Employer Identification Number (EIN) is a Federal Tax Identification Number used to identify a business. Your EIN can be found on the the paperwork you filed with the IRS to legally form your business. If you did not file with the IRS, you likely don't have an EIN.

Where can I find business type? This can be found on the paperwork you filed with the IRS to legally form your business. If you did not file with the IRS, you are likely a sole proprietor or independent contractor.

Who is WePay? WePay is the payment software company that Infusionsoft has partnered with to build Infusionsoft Payments. You can learn more about WePay here.

Post signup questions

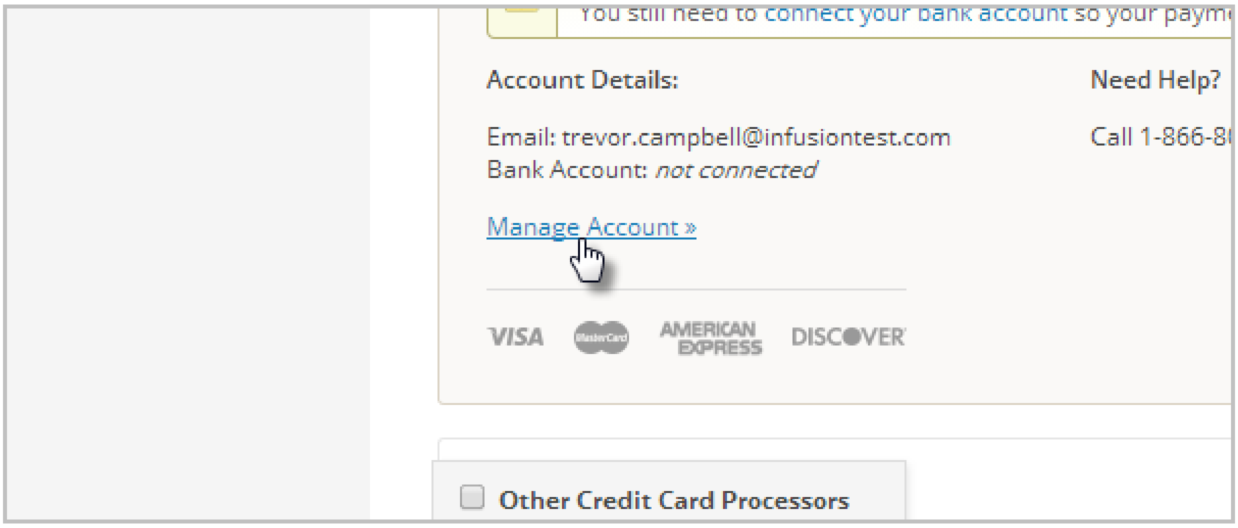
How soon after sign up can I begin taking payments? You can begin taking payments through Infusionsoft immediately after completing the Infusionsoft Payments setup process.

How do I transfer existing subscriptions or payment plans to be billed through Infusionsoft Payments? You will need to contact our Support team for assistance.

How do I set Infusionsoft Payments to be my default merchant account? If this is the first merchant account you've set up in your Infusionsoft app, then Infusionsoft Payments will automatically be set as the default merchant account to process credit cards. If you already have a different merchant account setup, you will see a new radio button option on the payment types page allowing you to select whether you want Infusionsoft Payments or your other merchant account to be the default merchant account for your app.

What credit cards can I accept with Infusionsoft Payments? When using Infusionsoft Payments you can accept Visa, Mastercard, American Express and Discover cards. Debit cards backed by Visa or Mastercard are accepted as well.

How do I sign in to manage my Infusionsoft Payments account? After completing the setup of your Infusionsoft Payments account you will see a link titled 'manage account' in the Infusionsoft Payments section of the Payment Types page in Infusionsoft. Clicking this link will take you to a login page where you will use your Infusionsoft Payments login email and password to access your account. Remember, these login credentials are separate from your Infusionsoft login credentials.



When will my funds be available for withdrawal? Our goal is to release your money for withdrawal as soon as possible. Once your payments have been fully processed they will be released for withdrawal.

Does Infusionsoft Payments have a required risk reserve minimum balance? Reserves are sometimes held to protect your business against chargebacks or disputes. We do not have a set reserve amount for our customers, instead any possible reserves will be set automatically based on the transaction history in your account as well as the information you provide in your profile, your industry, and how you're using Infusionsoft Payments.

I have an upcoming product launch which will result in a spike in sales, do I need to notify Infusionsoft first? We expect your business to grow! Which is why Infusionsoft Payments takes into consideration product launches and other activity that could cause a spike in sales. We treat these occurrences as normal business and as long as your account is active you shouldn't be concerned about having funds frozen due to an increase is sales. Feel free to notify us of any upcoming spikes in sales but it is not required.

Other Questions

Can I set up more than one Infusionsoft Payments account? Only one Infusionsoft Payments account can be set up per Infusionsoft account.

How do I get additional support? Infusionsoft Payments is supported by the Infusionsoft support team. Click here to contact Support.

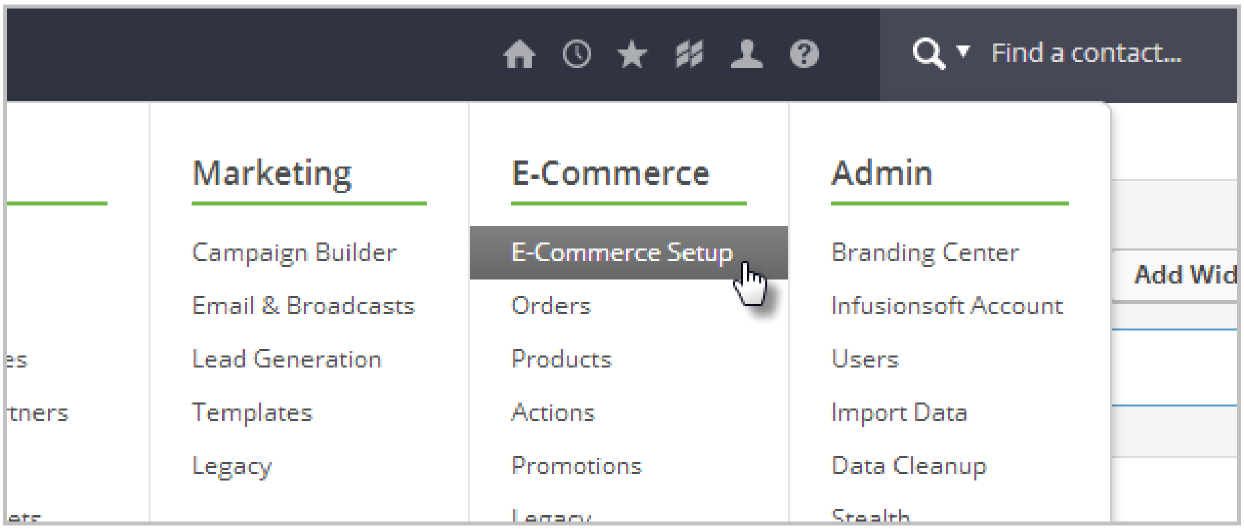
Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments Setup Guide

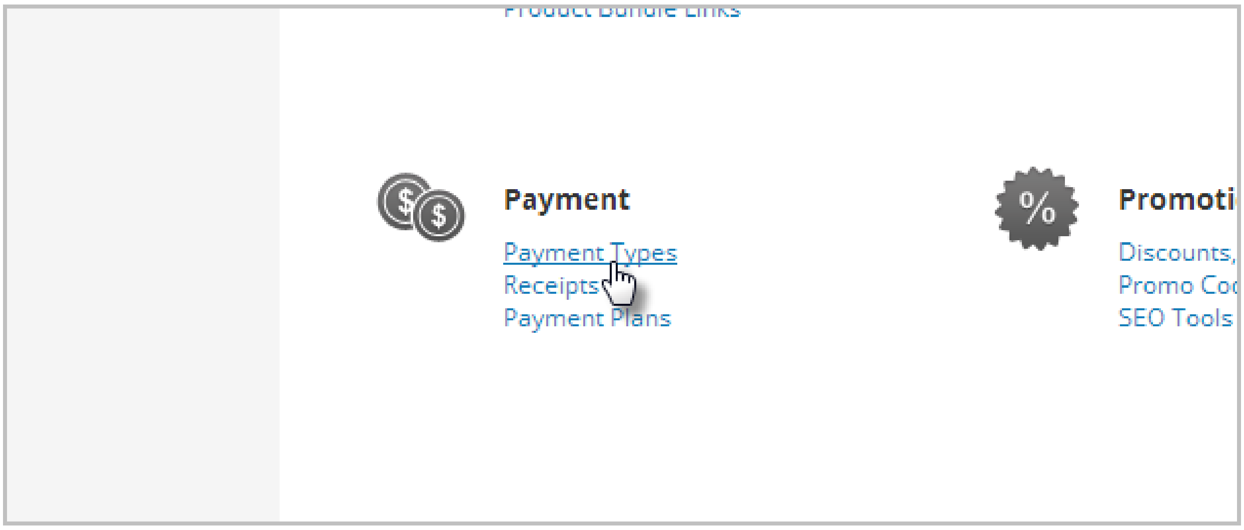
Last Modified on 08/01/2018 3:15 pm MST

Infusionsoft Payments eliminates stress for small businesses needing to accept credit cards. With Infusionsoft Payments, it's easy to accept credit cards in minutes. Infusionsoft Payments offers fast setup, transparent pricing and integrated, painless processing. Take the stress out of getting paid and get back to running your business.

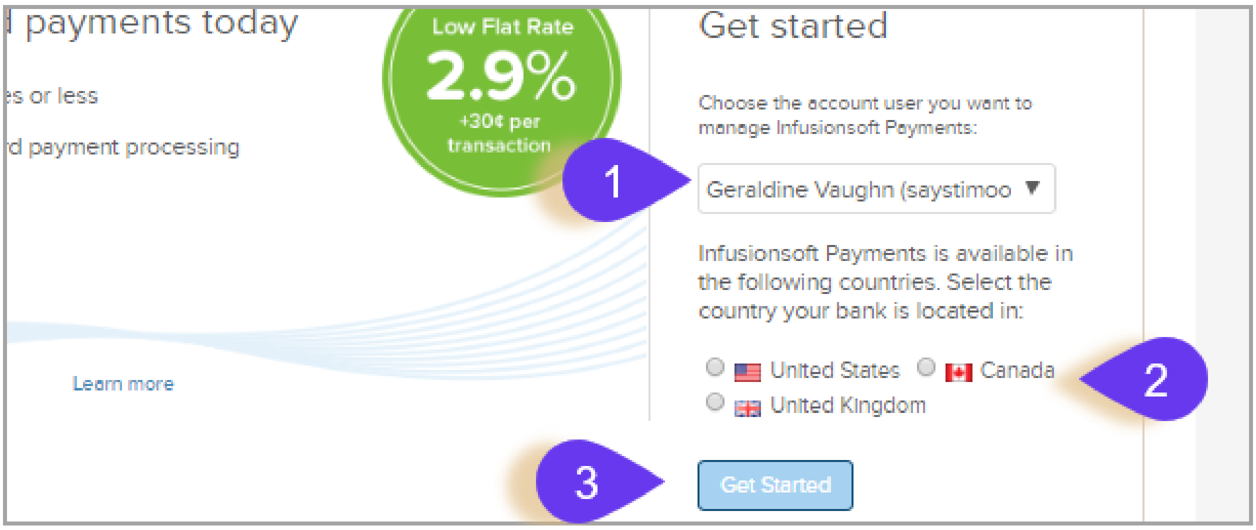
1. Go to **E-Commerce** > **E-Commerce Setup** in the main navigation menu



2. Click on the **Payment Types** link



3. To sign up, select the email address of the financial administrator of your Infusionsoft account, choose your country and click the **Get Started** button

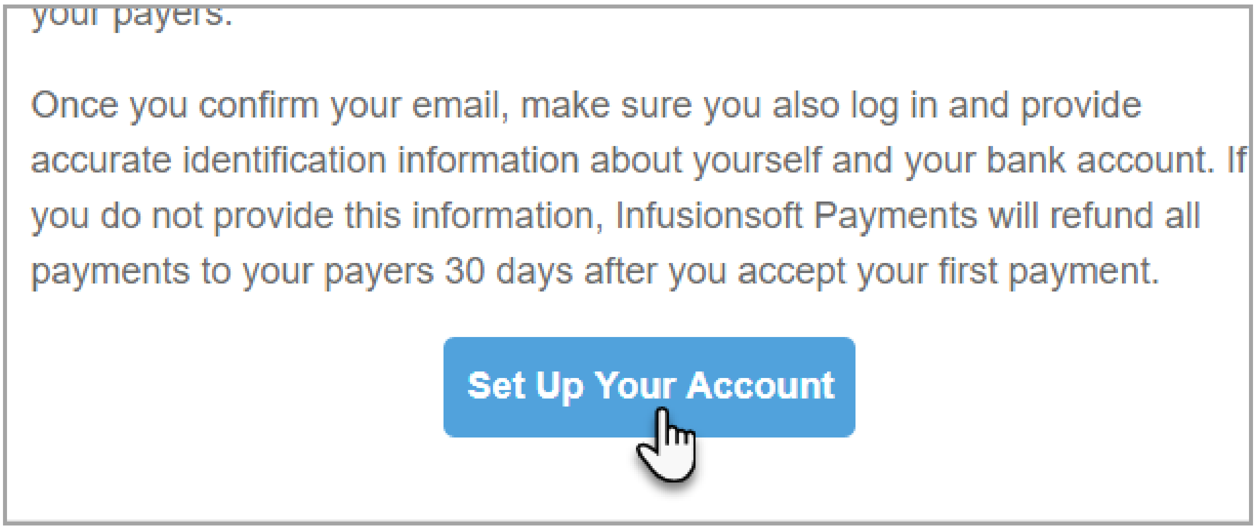


Pro Tip! Check out the Canada and UK FAQ pages

Pro Tip! Only Administrators in your Infusionsoft account have access to sign up with Infusionsoft Payments.

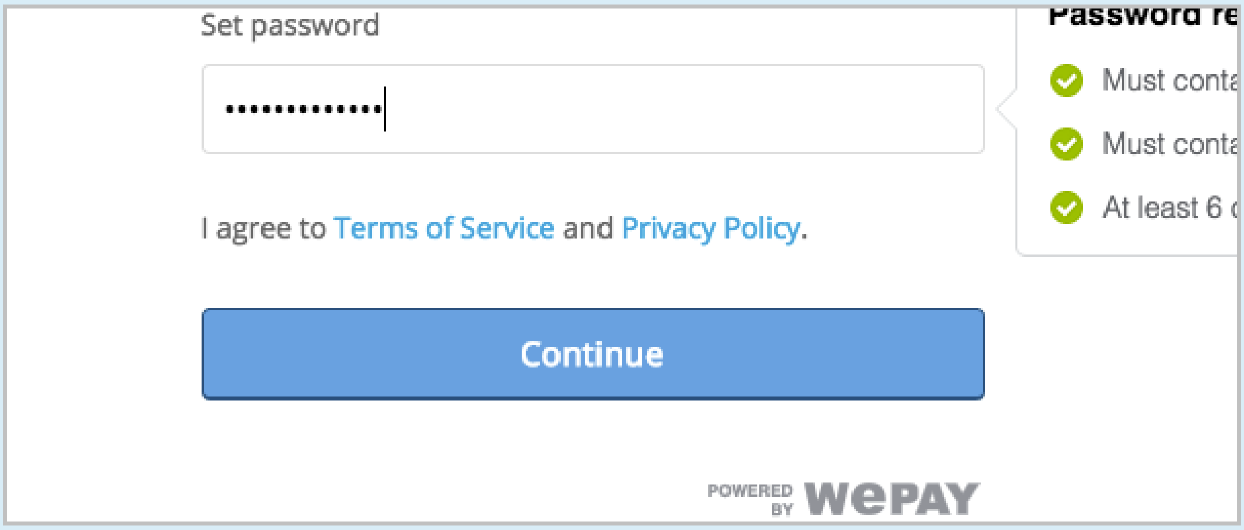
4. You will receive an email titled, *Please set up your Infusionsoft Payments account*

5. Click on the **Set Up Your Account** button



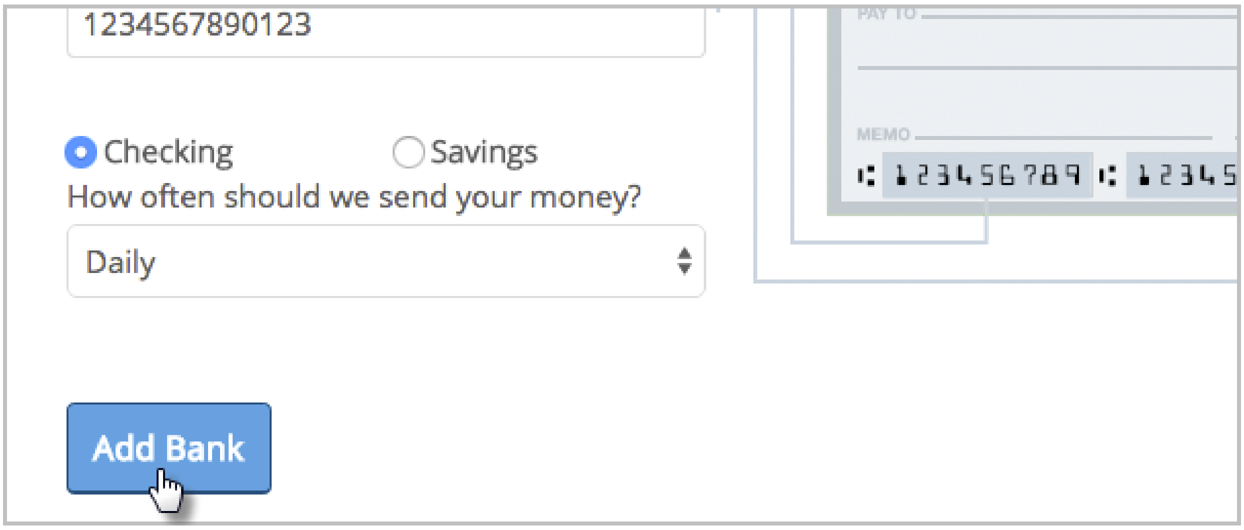
6. Enter a Password and click the **Continue** button. You will now be redirected back to your Infusionsoft account to finish the signup process.

Pro Tip! For increased security, the password you create for your Infusionsoft Payments account is separate from your Infusionsoft account login and password.

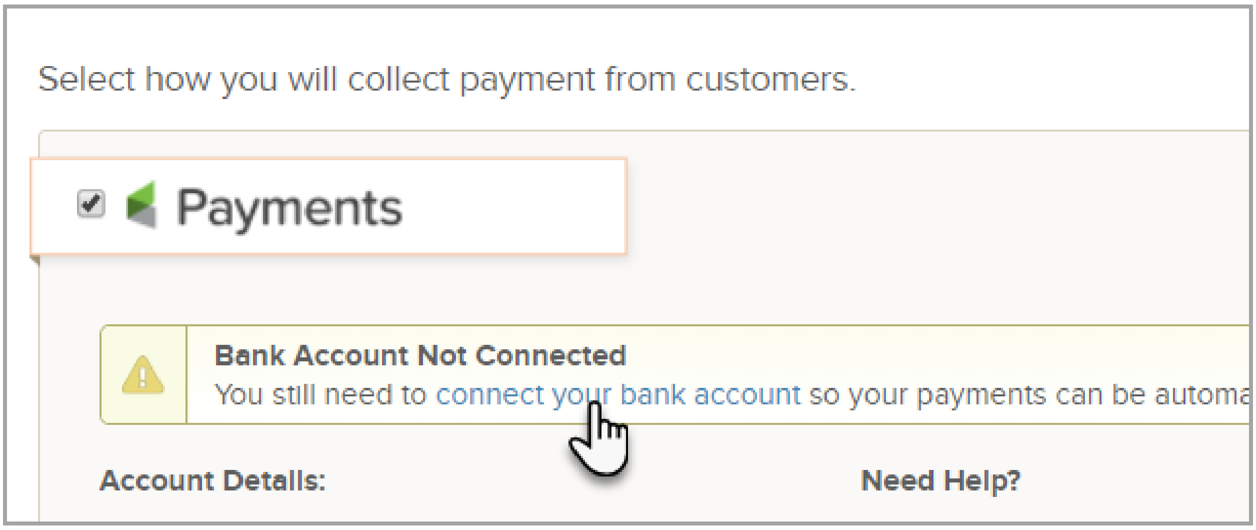


7. Complete the Account Setup section by entering your bank information and click the **Add Bank** button.

   Collect Payments As soon as you add your bank account information, you can start collecting payments; however you will not receive funds until you complete your application.



8. Click the **connect your bank account** link to complete the application process



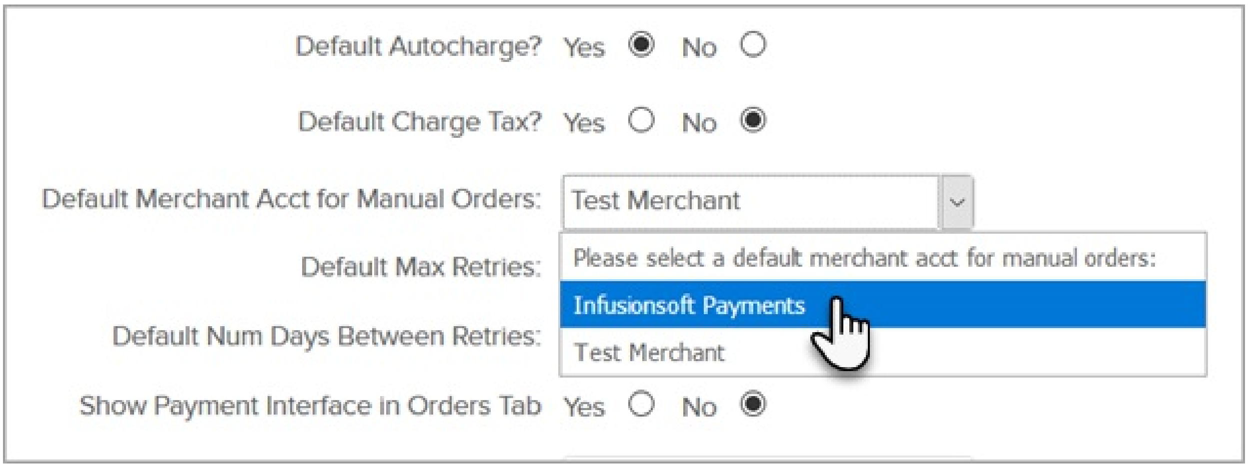
9. Once completed, you will be returned to the Payment Types page to see the details of your account

10. Click **Manage Account** to go to the WePay portal to manage your account. You will use the email and password you used in step #6

11. If you already have a payment gateway set up in your Infusionsoft account, you will

need to set Infusionsoft Payments as your Default.

Go to **E-Commerce** > **Settings** > **Orders and next to "Default Merchant Acct for Manual Orders"** select Infusionsoft Payments from the drop down.



Using a different version of Infusionsoft? Click Here to learn more

Who Is WePay

Last Modified on 08/01/2018 3:15 pm MST

WePay is the payment technology company that Infusionsoft has partnered with to build Infusionsoft Payments. WePay is the most flexible and easy to use payment processing solution designed specifically as a payment enablement solution for platforms like Infusionsoft. You can learn more about WePay here.

I have a question about Infusionsoft Payments, should I contact WePay or Infusionsoft?

Infusionsoft Payments is fully supported by the Infusionsoft Support team. All questions or issues can be directed to the Infusionsoft Payments support team via in-app chat or phone. Click here for Infusionsoft Support contact information.

Why do emails for Infusionsoft Payments come from support@wepay.com?

As our payment technology partner for Infusionsoft Payments, WePay will send you emails on behalf of Infusionsoft Payments in regards to activity on your account and actions that may be required. If you have any questions about these emails, simply contact our support team here .

Where are the WePay terms of service & privacy policy?

Click here to view the WePay terms of service & privacy policy. When signing up for Infusionsoft Payments you are agreeing to the terms outlined on this page.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments Canada FAQ

Last Modified on 08/01/2018 3:14 pm MST

This FAQ is an addendum to the primary Infusionsoft Payments FAQ which can be found here
.

Who is eligible for Infusionsoft Payments Canada?

Here are the requirements for using Infusionsoft Payments in Canada:

- You must have a Canadian tax ID
- You must have a Canadian Social Insurance number
- You must have a Canadian bank account
- You will only be able to accept payments in Canadian dollars (CAD) through Infusionsoft Payments
- Funds can only be settled to your bank account in Canadian dollars

Which credit cards can I accept through Infusionsoft Payments Canada?

Visa and MasterCard can be accepted through Infusionsoft Payments Canada.

Can I accept USD and CAD with Infusionsoft Payments Canada?

At this time, Infusionsoft Payments Canada accounts can only accept and settle funds in CAD. After signing up for Infusionsoft Payments, the default currency will be set to CAD in your Infusionsoft application.

My business is registered in Canada, but I am an American citizen (or visa-versa), can I sign up for Infusionsoft Payments?

Your business tax ID and social insurance/security number must be in the same country to sign up for Infusionsoft Payments in either Canada or US.

More questions?

Check out the primary Infusionsoft Payments FAQ which can be found here.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments UK FAQ

Last Modified on 08/01/2018 3:14 pm MST

This FAQ is an addendum to the primary Infusionsoft Payments FAQ which can be found here .

Who is eligible for Infusionsoft Payments UK?

Here are the requirements for using Infusionsoft Payments in the United Kingdom:

- You must have the country in Infusionsoft's CAN-SPAM address be in the United Kingdom to be eligible for Infusionsoft Payments UK
- Infusionsoft Payments lets you manage payments for UK merchants who:
  - Are domiciled in the UK
  - Have a UK bank account
  - Want to transact and receive settlement in British pounds (GBP)

Which credit cards can I accept through Infusionsoft Payments UK?

Visa and Mastercard can be accepted through Infusionsoft Payments UK.

Can I accept currencies other than GBP with Infusionsoft Payments UK?

At this time, Infusionsoft Payments UK accounts can only accept and settle funds in GBP. After signing up for Infusionsoft Payments UK, the default currency will be set to Pounds in your Infusionsoft application.

More questions?

Check out the primary Infusionsoft Payments FAQ which can be found here .

Can I make a test transaction with Payments UK?

Yes, you can test transactions with Payments UK. Please note that to successfully run a test transaction the order must be greater than £1

How do I manage my Dashboard?

Check out how to manage your Dashboard here .

Using a different version of Infusionsoft? Click Here to learn more

Why Do You Need My Social Security Number

Last Modified on 08/01/2018 3:14 pm MST

Infusionsoft Payments uses your social security number ("SSN") as part of its identity verification program.

Infusionsoft Payments in partnership with WePay verifies the identity of each user of the Infusionsoft Payments service in order to manage risk and to comply with anti-money laundering laws. If you are an individual or sole proprietor, Infusionsoft Payments will also use your SSN for any required tax reporting. If you are acting on behalf of a corporation or other organization with an Employer Identification Number ("EIN"), Infusionsoft Payments will use the EIN for any required tax reporting instead. Check out our article on 1099-K reporting for more detailed information.

Even if you are acting on behalf of an entity with an EIN, Infusionsoft Payments requires your SSN so that Infusionsoft Payments can verify who you are and that you are authorized to act on behalf of the entity. All of the information you enter on Infusionsoft Payments is kept safe by our bank-level security measures.

Will Using Infusionsoft Payments Affect My Taxes

Last Modified on 08/01/2018 3:16 pm MST

Using Infusionsoft Payments does not necessarily affect your taxes. Infusionsoft Payments helps you organize your payments and under certain circumstances will issue you Form 1099-K, a requirement from the IRS. This will be sent from our payments partner WePay.

What is Form 1099-K and what does it contain?

Form 1099-K is the IRS's information return for reporting the movement of funds. It reflects the gross dollar amount that you collected in the previous calendar year. In addition, the IRS 1099-K form should reflect your legal name and Taxpayer Identification Number (TIN). It is up to you (and your tax professional) to determine whether these amounts represent taxable income.

When will Infusionsoft Payments send me the form?

If you collect at least $20,000 and have at least 200 transactions in the calendar year, Infusionsoft Payments will send you the 1099-K form by January 31 of the following year. All payment processors are required to issue the 1099-K form by law. Infusionsoft Payments is also required to file a corresponding tax form with the IRS, which participates in a combined filing program with many state tax agencies.

We are a business or non-profit. Do these thresholds apply to us as well?

Yes, these thresholds apply to all US-based businesses including non-profits and other tax-exempt entities. However, the 1099-K form will be sent with the name and Taxpayer Identification Number (TIN) of your business or non-profit, rather than the Infusionsoft Payments account's administrator's legal name and social security number.

In other words, if you are an administrator of an Infusionsoft Payments account for a business or non-profit, you will not take on any tax liability on behalf of the business or non-profit under your own social security number.

Are refunds and fees included in the $20,000?

The $20,000 threshold does not account for refunds or fees. Gross payment volume is determined by the amount of money your customers originally paid.

How should I use the information from the 1099-K form?

It is up to you (and a tax professional) to determine whether your proceeds represent taxable income. Infusionsoft Payments will not report the funds that you collected as earned income. The 1099-K form is simply intended to track the movement of funds.

I am not a US citizen or a permanent resident. Will I get the 1099-K form from Infusionsoft Payments?

Yes, if you meet the requirements of at least $20,000 collected and at least 200 transactions in a calendar year you will receive the 1099-K form.

Using a different version of Infusionsoft? Click Here to learn more

Why Was My Withdrawal Cancelled Or Charged Back

Last Modified on 08/01/2018 3:16 pm MST

If you've received an email or notification that a withdrawal was cancelled or created a charge-back, this could be for a couple of reasons:

- The username on the Infusionsoft Payments account (the name in the gray bar at the top of the Infusionsoft Payments account homepage) does not match the legal name listed on the bank account.
- The bank account and/or routing number(s) entered do not match what the bank has on file (sometimes from a typo when entered.)

If the bank account had incorrect information, it may have been deleted and the funds would have been returned to your Infusionsoft Payments payment account. To be sure we are able to send the funds back out to you, please be sure to enter your updated bank information as soon as possible.

To add or update the bank account, follow these steps:

1. Login to your Infusionsoft Payments account
2. Go to the right-hand side and click the grey gear icon that says**Settings**
3. Click the **Withdrawals** tab from the left side of the page
4. Click the blue button that says **Link your bank account**
5. Enter in the routing number, account number, and bank name for your account (if you are unsure about any of this information, please reach out directly to your bank to confirm.)
6. Indicate if this is a *checking* or *savings* account
7. Choose how often you want your money sent to you in the future after this withdrawal is corrected and sent

8. Click **Continue** and you’re all set!

9. The new withdrawal will initiate the next business day and takes 2-5 business days to arrive.

Using a different version of Infusionsoft? Click Here to learn more

Why Isn't My Balance Fully Available

Last Modified on 08/01/2018 3:17 pm MST

There can be a few different reasons why an account balance isn't fully available for withdrawal. Below are several reasons, as well as some extra info about each reason:

One or more payments haven't fully processed

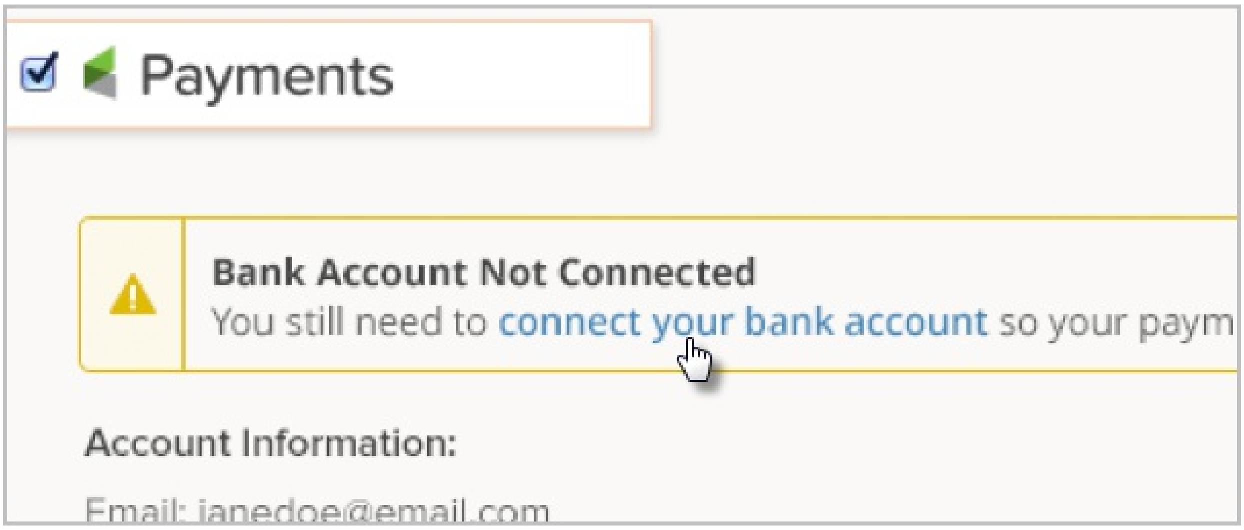
Pending payments are payments that are subject to minor delays from reviews. Payments are reviewed to protect merchants and payers from any malicious activity and ensure they are compliant with the WePay Terms of Service .

It can take up to two business days for us to review a pending payment. Bank payments can take longer to clear because the payer must first verify their bank account information.

Payments may clear faster if the information that we ask for is provided in the Trust Center.

The account holder needs to link their bank account

A bank account must be linked in order to receive funds from Infusionsoft Payments. Visit the payment types page in your Infusionsoft application and click the 'connect your bank account' link to complete the process. Learn more



There are reserves on the account

WePay has a unique reserves system that tries to balance getting merchant's their money as soon as possible while also protecting against risky elements like fraud.

A portions of payments that WePay holds to protect the merchant's business against chargebacks or disputes. Reserves are based on the transaction history in their account as well as the information provided at sign up, including their industry and how the merchant is using Infusionsoft Payments.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments Migration Guide

Last Modified on 08/01/2018 3:17 pm MST

Everything you need to know to migrate from another merchant account you were previously using to start processing payments in Infusionsoft.

Set your default credit card processor to Infusionsoft Payments

If you have another active merchant account setup in Infusionsoft, you will see an additional setting to *Set as default credit card processor*. When you are ready to begin processing your credit card payments through Infusionsoft Payments, make sure to select this option in the Infusionsoft Payments section of the Payment types page.

Set your default account for manual payments

If you process payments manually, meaning you or your team enters payment information manually into Infusionsoft to make payments for your customers, then you'll want to also change that setting to ensure you are processing through Infusionsoft Payments. Navigate to E-commerce > Settings page, then click on the Orders tab (left tabs) and scroll down a bit to the Billing Section. There you'll find the Default Merchant Acct setting where you will select Infusionsoft Payments from the drop-down.

Verify PayPal settings

If you previously accepted PayPal and plan to continue accepting PayPal from your customers on your order forms and in your shopping cart, ensure that the checkbox for PayPal remains checked on the payment types page. If you no longer plan to accept PayPal, un-check the box for PayPal and click the **Save** button at the bottom of the page.

Transfer existing subscriptions & payment plans

If you have active subscriptions or payment plans that you want to transfer from your existing payment processor to Infusionsoft Payments, simply contact the Infusionsoft Support team and put in a request. Your transfer should be processed within 48 hours if made during the week.

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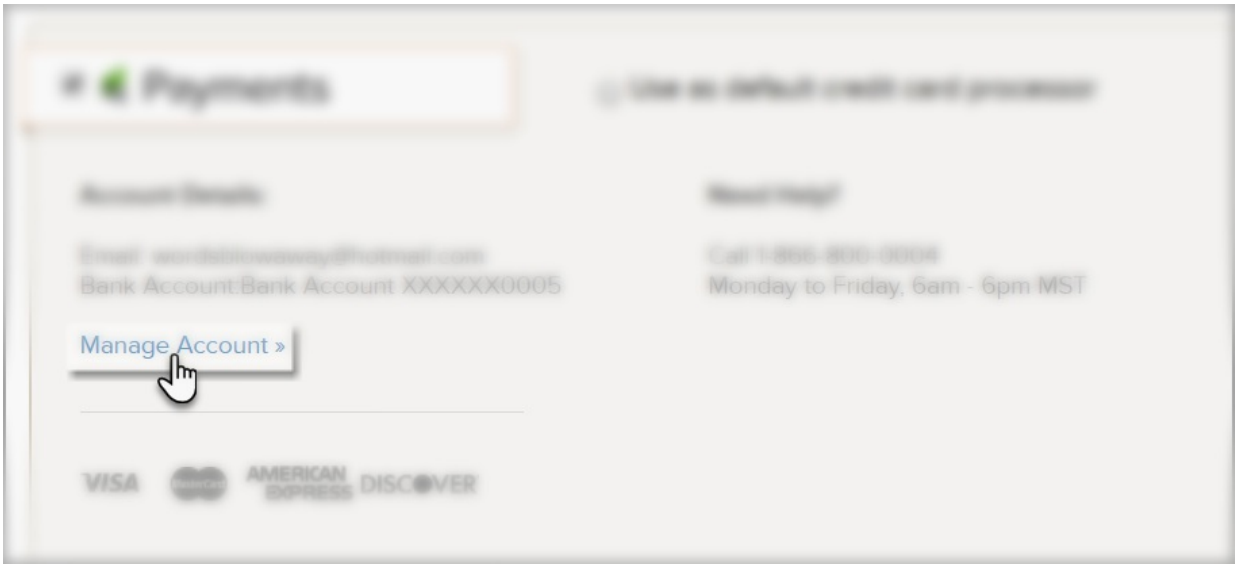
Log In To The Infusionsoft Payments Merchant Center

Last Modified on 08/01/2018 3:17 pm MST

If you utilize Infusionsoft Payments to process payments in Infusionsoft, you will have access to the Infusionsoft Payments Merchant Center. The Infusionsoft Payments Merchant Center lets you generate reports, view activity, process refunds, and address any charge-backs. You will create your log-in credentials during your initial setup of Infusionsoft payments.

To access your WePay Merchant Portal

- Use direct link or navigate in Infusionsoft application:
- E-commerce > E-commerce setup > Payment Types > Under Infusionsoft payments box: Manage Accounts



- Login using the information created when signing up for your Infusionsoft Payments Account.
    - If you are unable to remember your login information, utilize the "Forgot your password?" link.

Important Note! The Email and Password used to log into the Infusionsoft Payments

Merchant Center may be different than the your Infusionsoft login credentials.

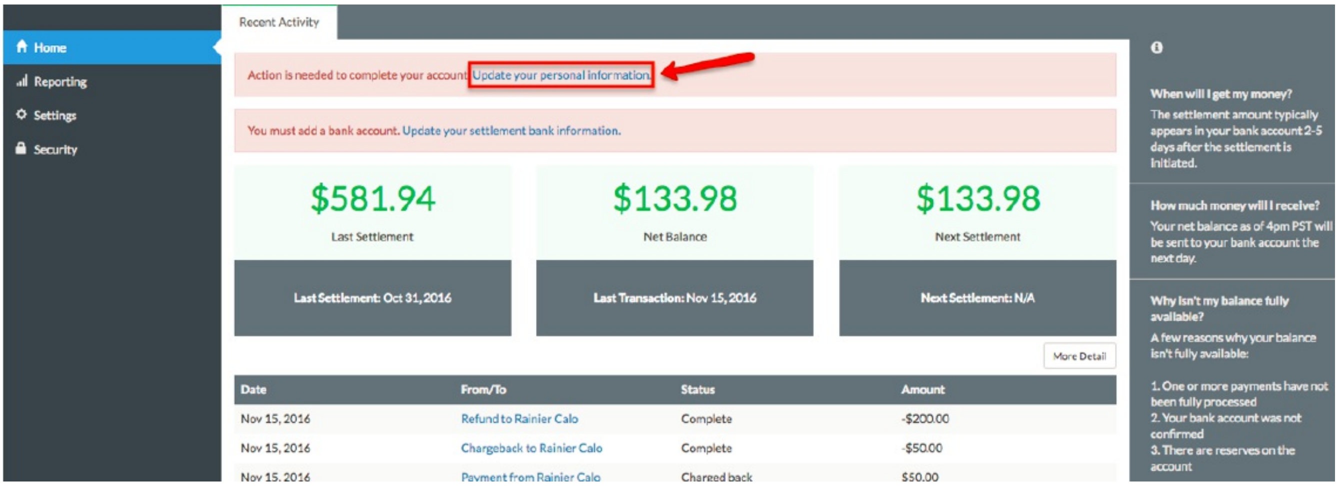
Using a different version of Infusionsoft? Click Here to learn more

Completing Infusionsoft Payments Account Setup

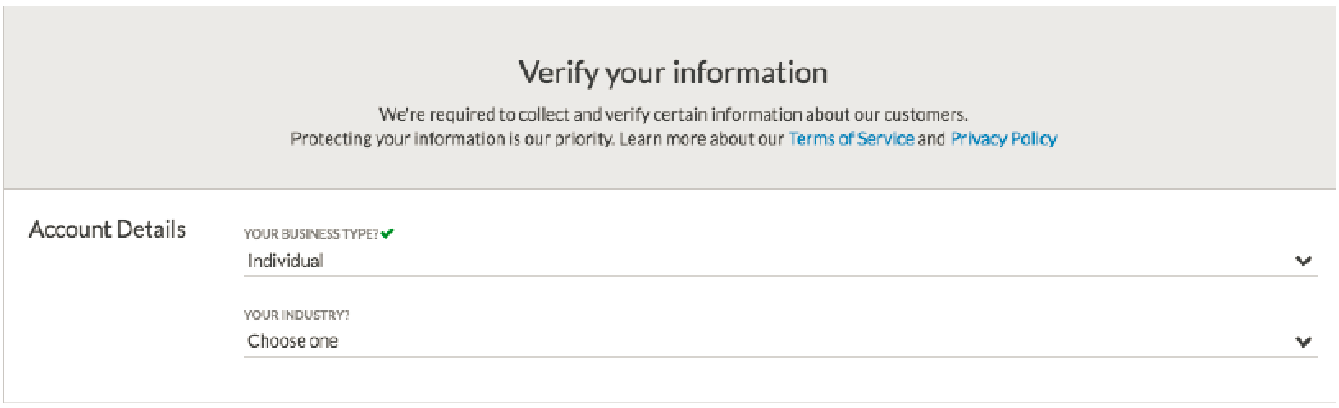
Last Modified on 08/01/2018 3:17 pm MST

When setting up your Infusionsoft Payments account, an admin may receive a notification on their homepage that states "Action is needed to complete your account. Update your personal information." Use the following steps to complete the account setup in the KYC (Know Your Customer.)

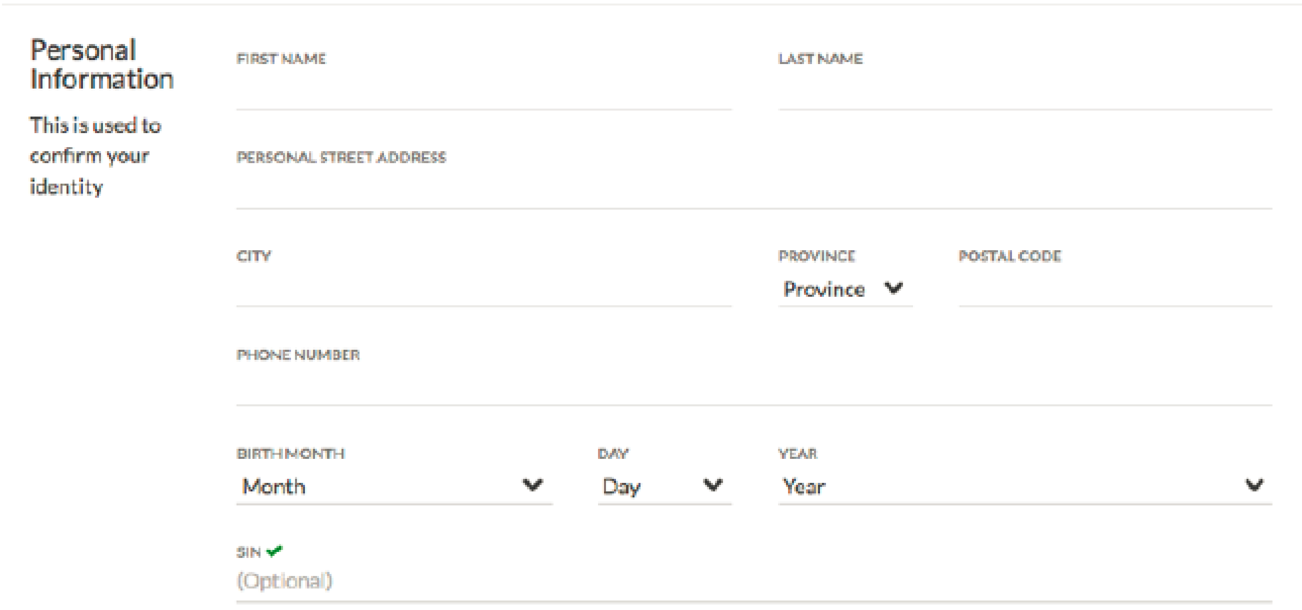
1. In the Infusionsoft Payments Merchant Center Dashboard, click the link to **Update Personal Information**



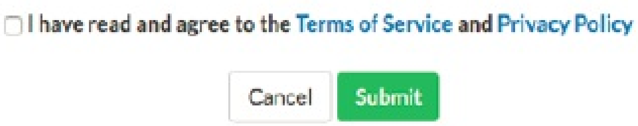
2. Choose your account type under **Account Details**



3. Enter your verification details under **Personal Information**



4. Review and Agree to the Terms of Service and Privacy Policy, and click Submit



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Infusionsoft Payments how to Add/Change Bank Account

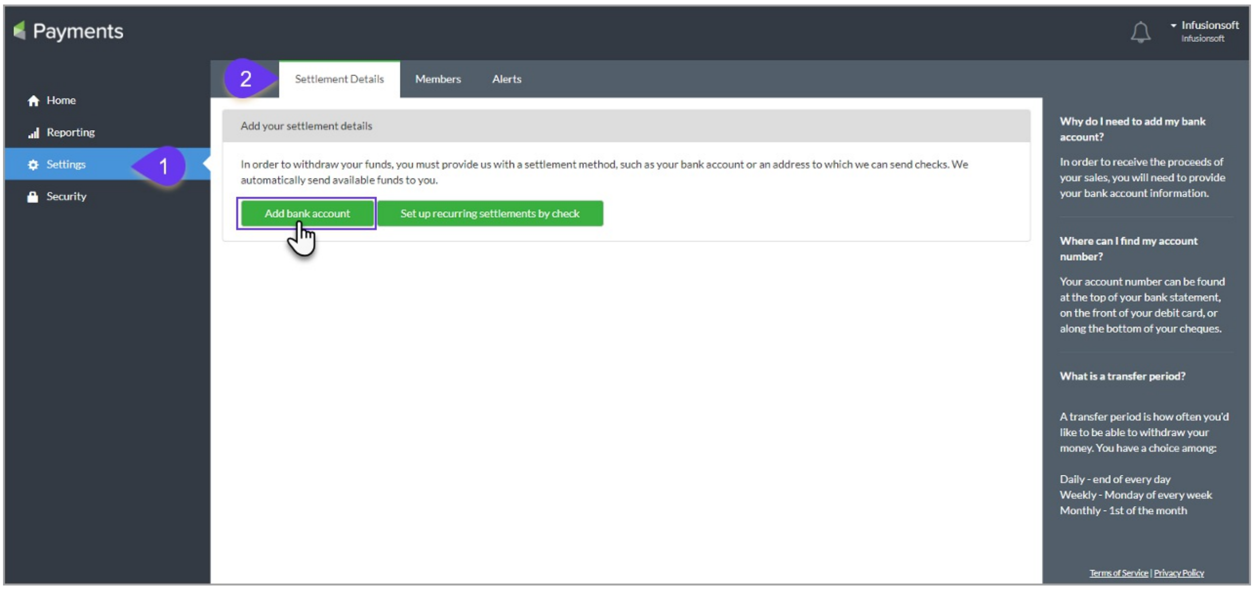
Last Modified on 08/01/2018 3:18 pm MST

With Infusionsoft Payments, you can link a bank account to automatically deposit settlement withdrawals into. US accounts also have the option to request withdrawals to be paid via check.

Pro Tip! Click on images to view larger

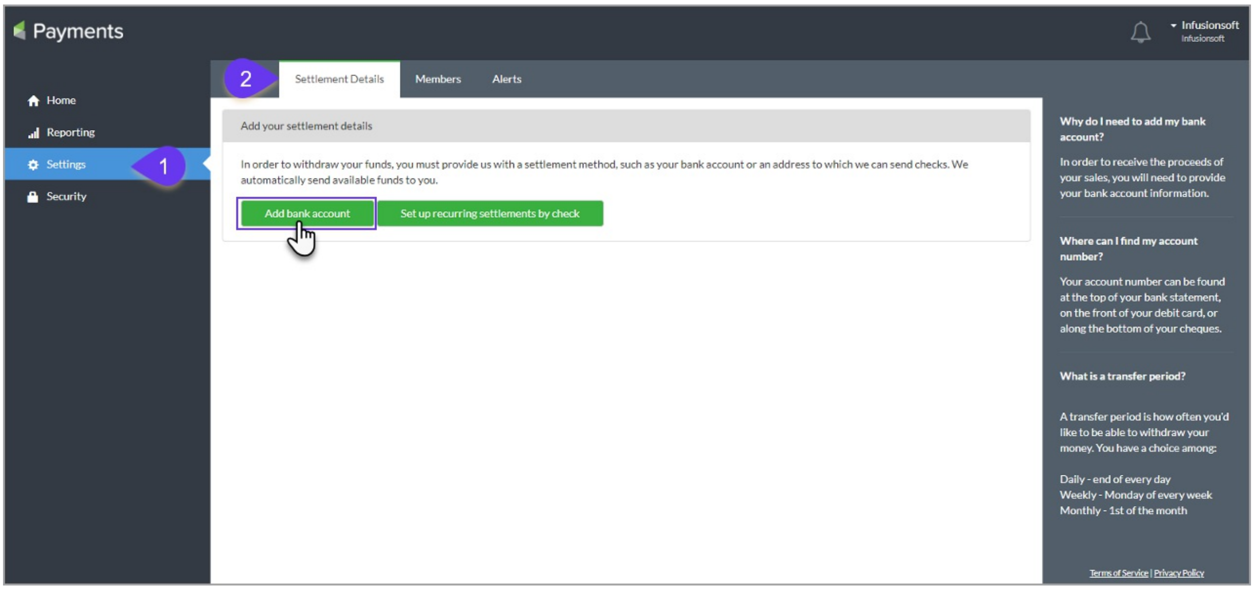
Setting up a new Settlement Option

- Click on "Settings" in the menu on the left-hand side of the page.
- Click on the "Settlement Details" tab.
- Merchant will need to choose if they want to link a bank account for direct transfer or receive a paper check (paper check only available in US and not recommended for fast processing).



Add Bank Account

- Click the "Add Bank Account"



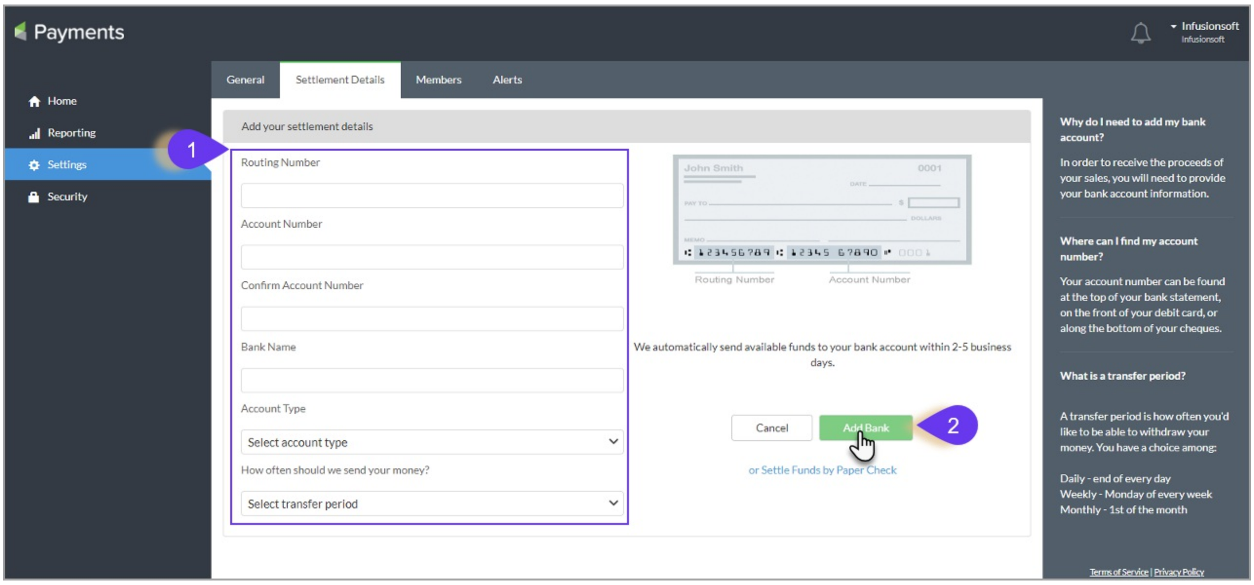
- Enter Routing Number, Account Number, Confirm Account Number, Bank Name, and Account Type (Checking or Savings)

  ***Note**: Canada Merchants will need to enter the Transit Number, Financial Institution

Number, Account Number, and Bank Name

- Select how often the merchant would like to be paid: Daily, Weekly (every Monday), or Monthly (1st of every Month).

- When finished click "Add Bank"

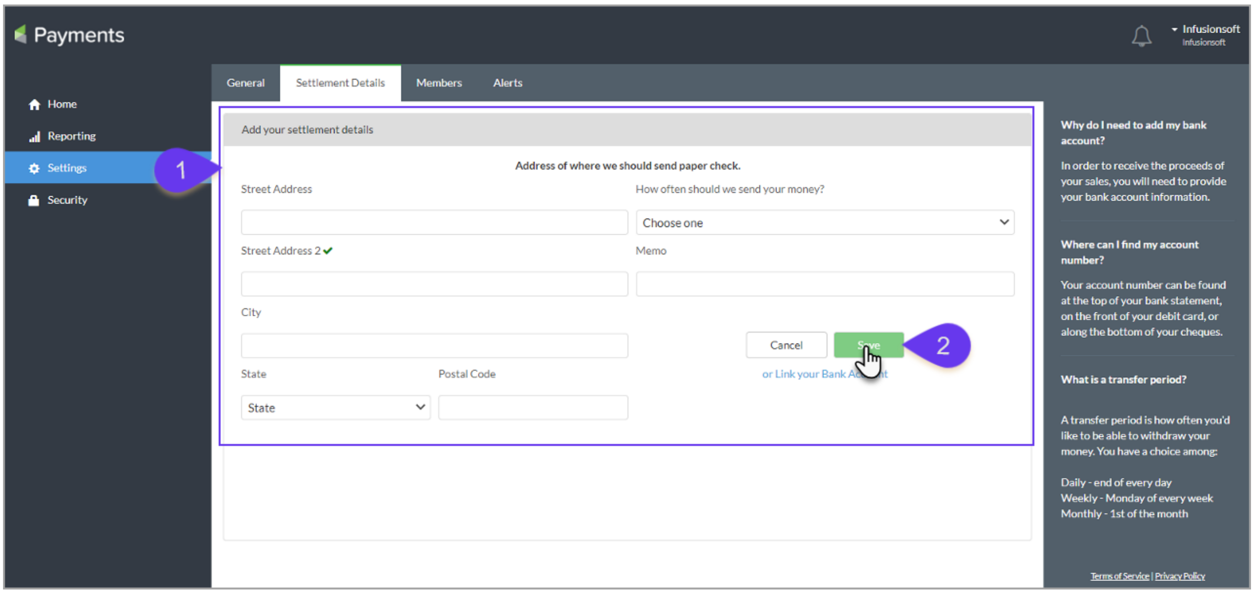


Setup Paper Check

- Click the "Set up recurring settlements by check".

- Enter your full address, fill out the check memo, and select how often the merchant would like to receive checks: Weekly – every Monday or Monthly - 1st of the month

- Click "Save"

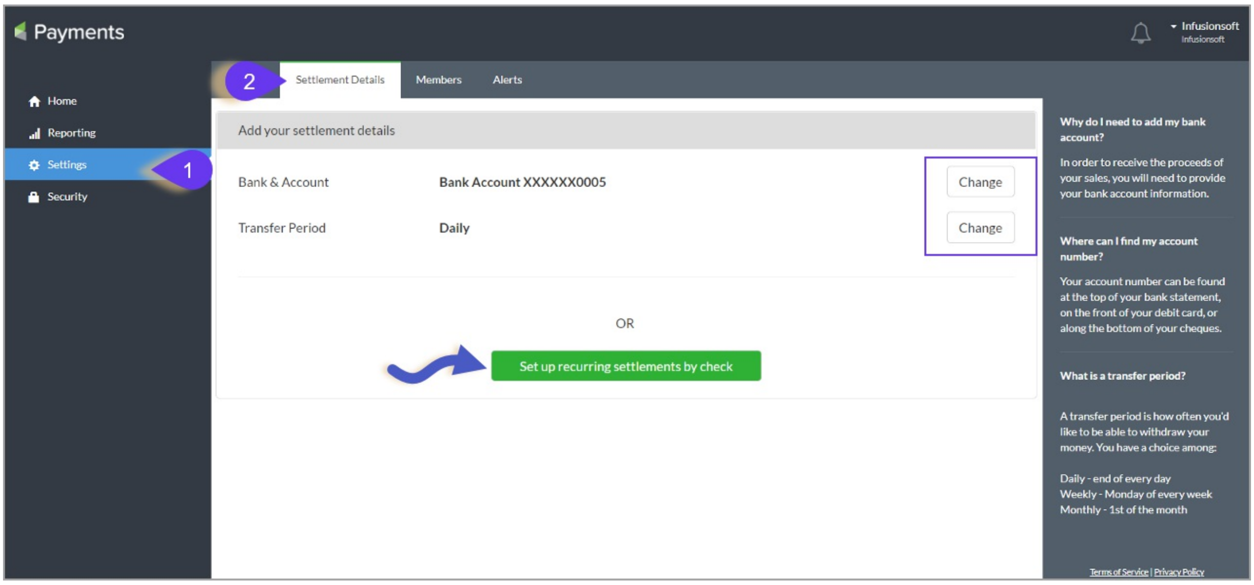


***Note**: This is for USD ONLY

Change Payout

If a bank account is connected and needs to be changed or the merchant would like to change to/from a paper check

- Click on "Settings" in the menu on the left-hand side of the page
- Click on the "Settlement Details"
- Click the "Change" button next to Bank & Account
- If merchant would like to change to a paper check at this point they can click the 'Settle Funds by Paper Check" link and fill out the information as notated in the paper check steps.


Payments
Infusionsoft
Infusionsoft
Home
Reporting
Settings
Security
2
Settlement Details
Members
Alerts
1
Add your settlement details
Bank & Account
Bank Account XXXXXX0005
Change
Transfer Period
Daily
Change
OR
Set up recurring settlements by check
Why do I need to add my bank account?
In order to receive the proceeds of your sales, you will need to provide your bank account information.
Where can I find my account number?
Your account number can be found at the top of your bank statement, on the front of your debit card, or along the bottom of your cheques.
What is a transfer period?
A transfer period is how often you'd like to be able to withdraw your money. You have a choice among:
Daily - end of every day
Weekly - Monday of every week
Monthly - 1st of the month
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Updating Infusionsoft Payments Merchant Center Email And Password

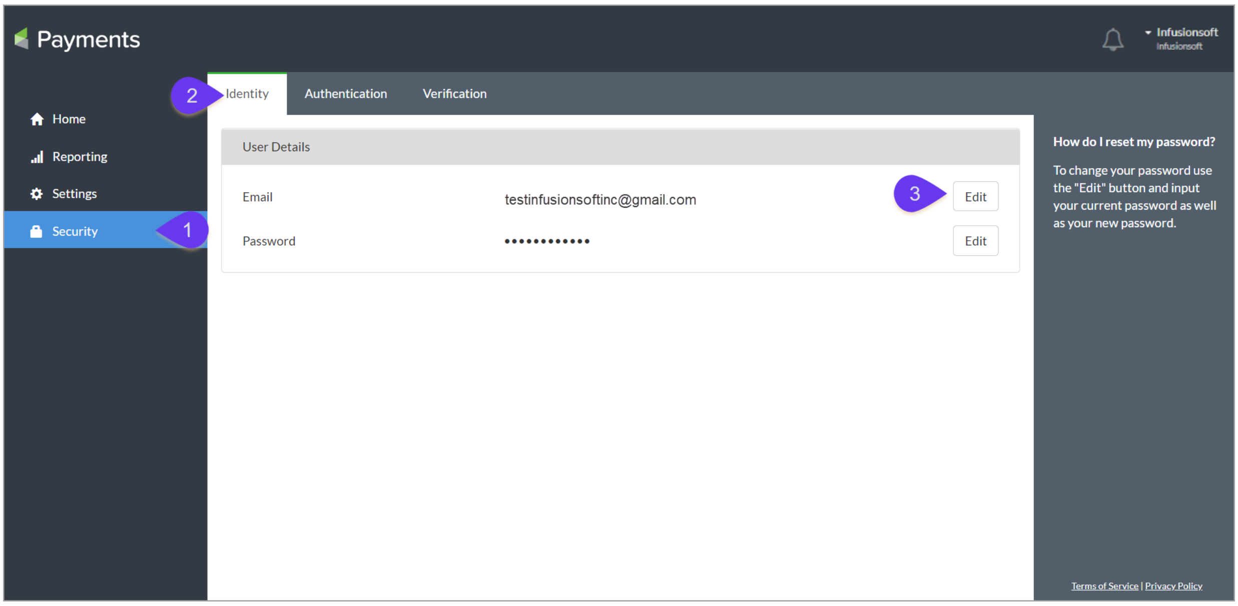
Last Modified on 09/28/2018 9:27 am MST

Updating your Infusionsoft Payments Merchant Center Email and Password is available in your 'Security' section of the Merchant Center.Please note, if you are updating your email address, you will need to utilize an email address that is not currently registered with Infusionsoft Payments / WePay.

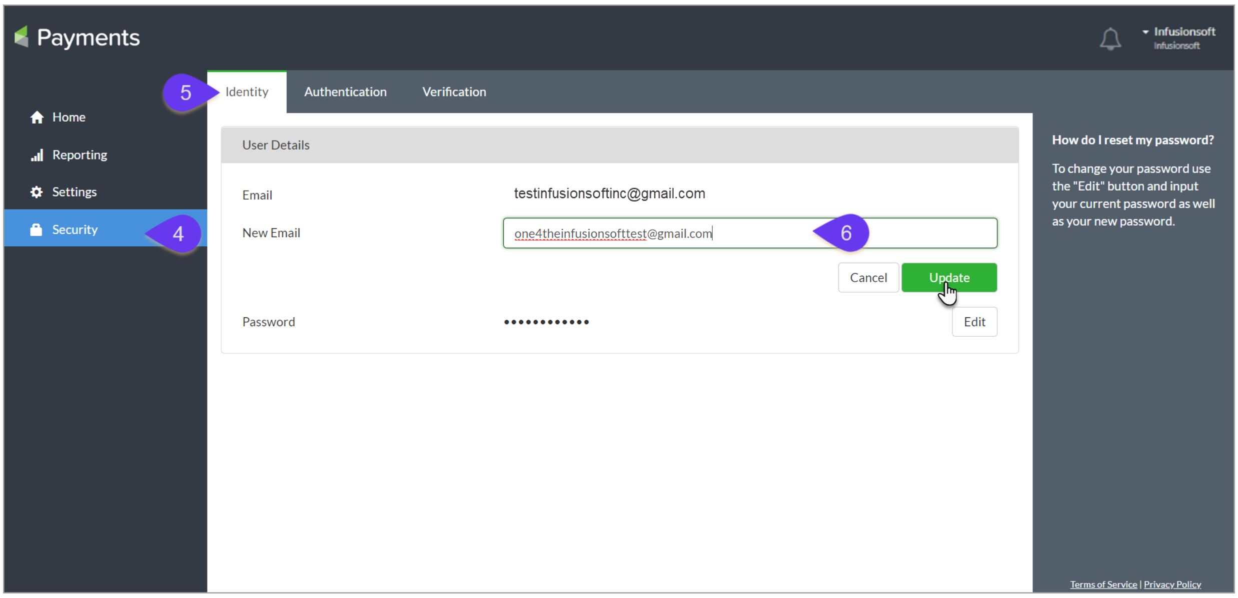
Pro Tip! Click images to view larger

Change Email Address

- Click on "Security" in the menu on the left-hand side of the page.
- Click the "Edit next to the email in the "Identity" tab.



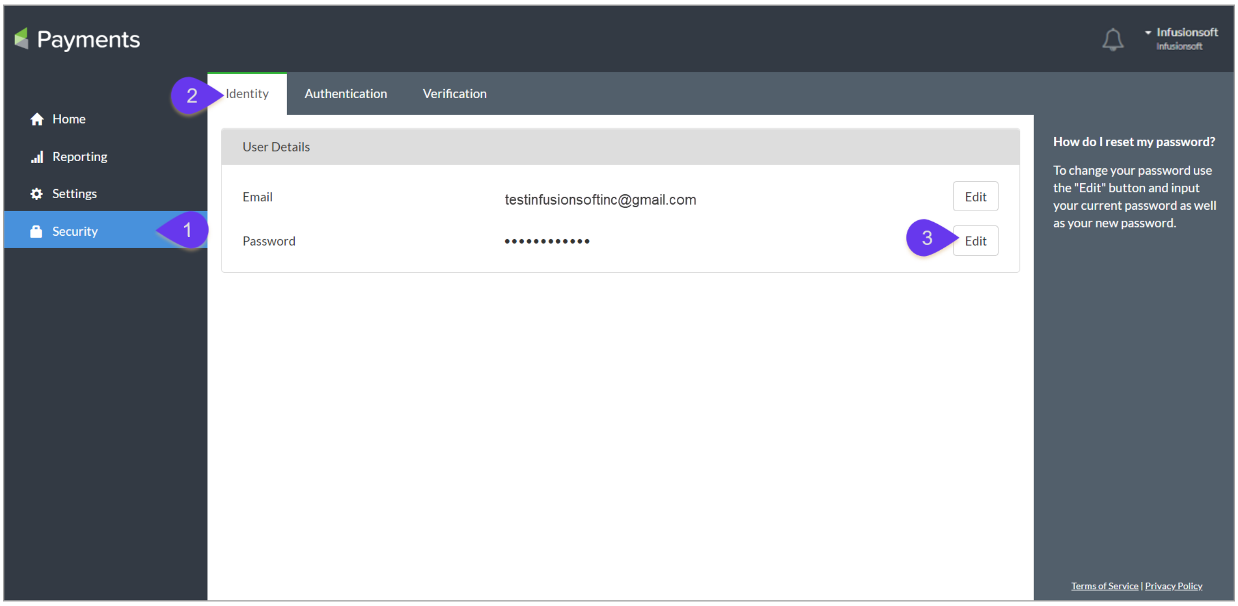
- Enter the New email and click the "Update".



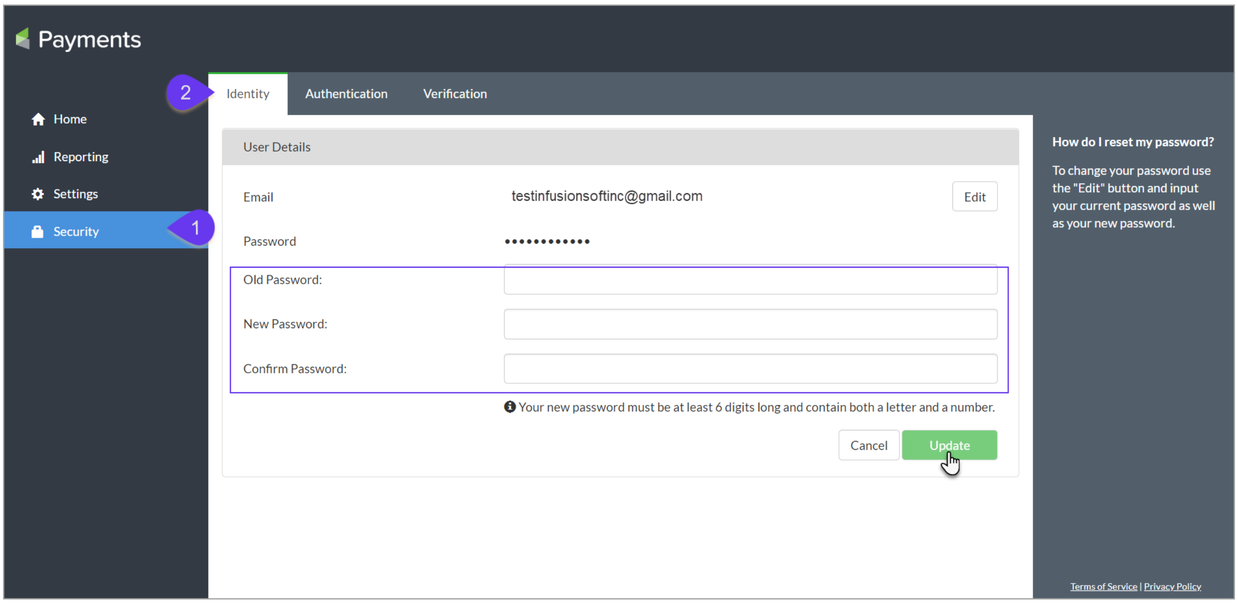
**Please note you will need to use an email that it not currently registered with WePay.

Change Password

- Click on "Security" in the menu on the left-hand side of the page.



- Click the "Edit" next to password in the "Identity" tab.



Issues Changing Password

To reset the password for your WePay account, click on the link below and enter in your email address:

https://www.wepay.com/register/recover

You'll receive a password reset in your inbox within the next few minutes. If the reset password email doesn't arrive, you may need to check your spam folders or add support@wepay.com to your trusted senders list. These steps are located here

If you do not have access to the email that the reset password is sent to, pleasecontact Support to have that email address changed.

Using a different version of Infusionsoft? Click Here to learn more

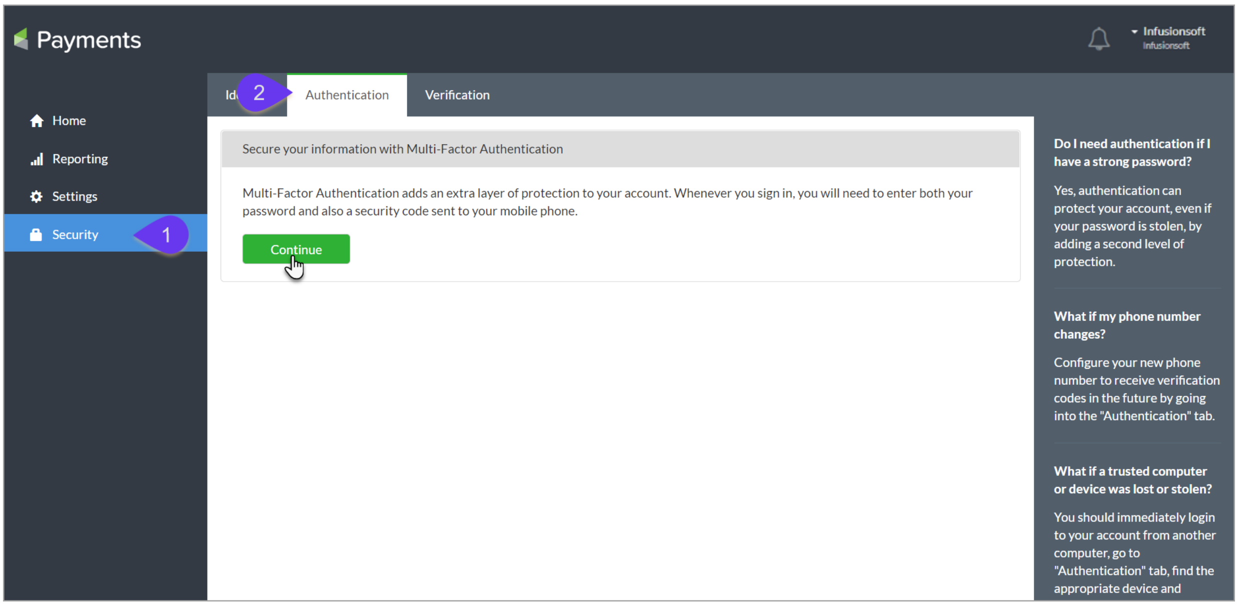
Multi Factor Authentication For Infusionsoft Payments Merchant Center

Last Modified on 08/02/2018 10:43 pm MST

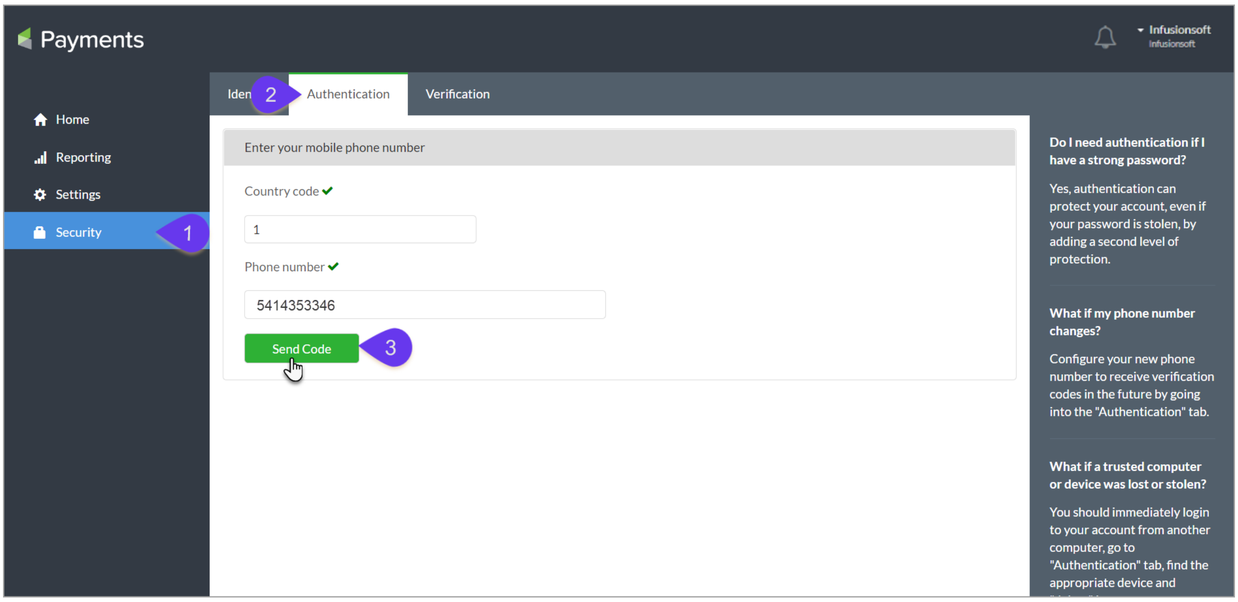
Multi-Factor Authentication for the Infusionsoft Payment Merchant Center allows for you to add an extra layer of security to your Merchant Center. You will be able to set up trusted devices, and a verification code will be sent via test message when attempting to log in on devices that you have not set as a trusted device.

Pro tip! Click images to view larger

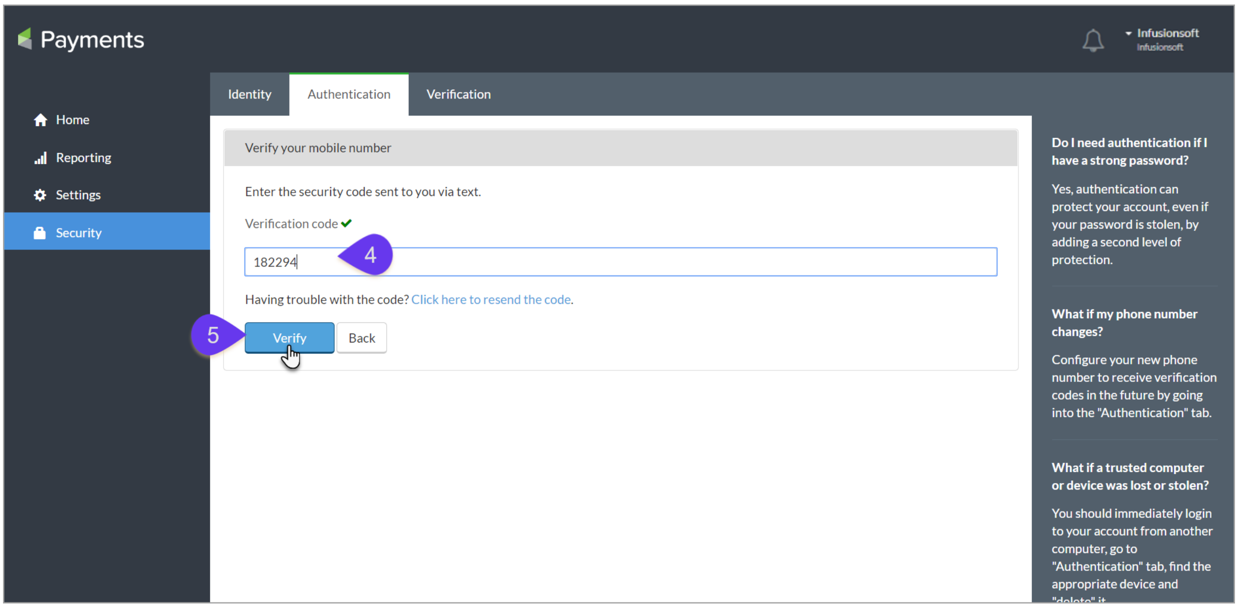
- Click on "Security" in the menu on the left-hand side of the page.
- Click the "Authentication" tab and then click "Continue".



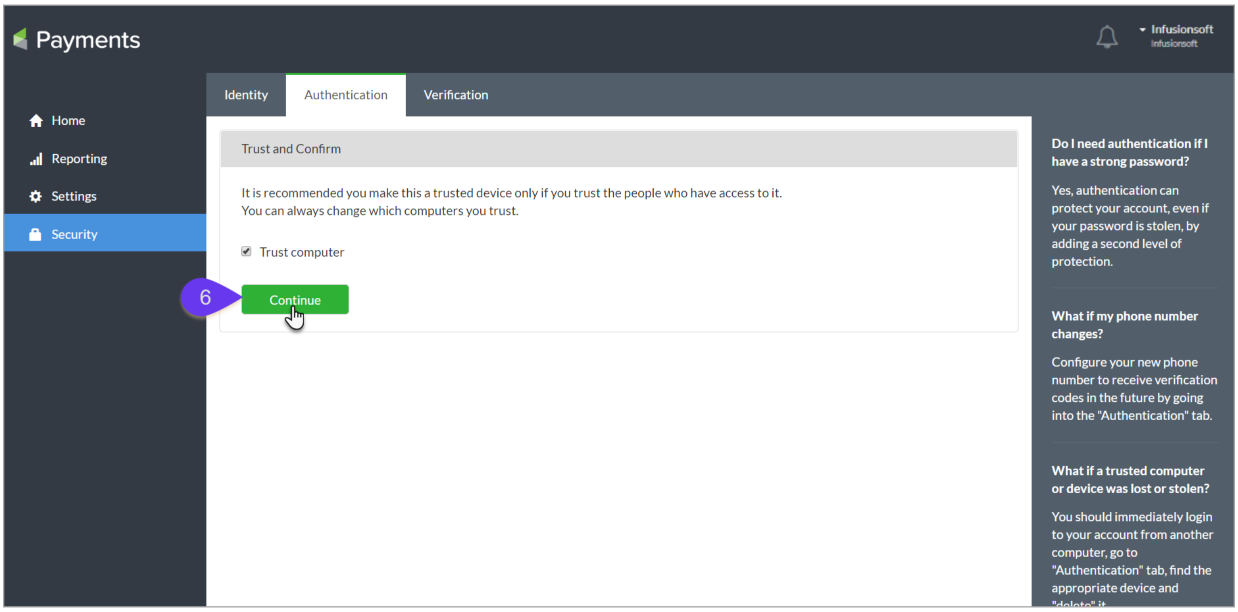
- Enter ""Country Code" and "cell phone number", then click "Send Code".



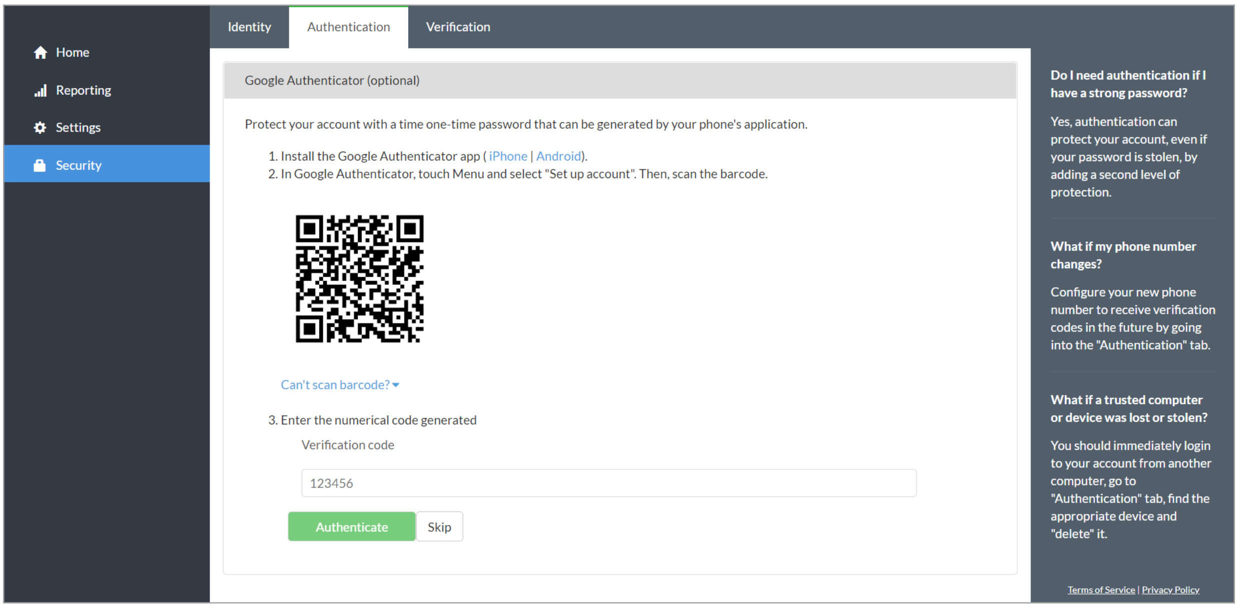
- Once the merchant receives a text with the code, enter the code and click "Verify".



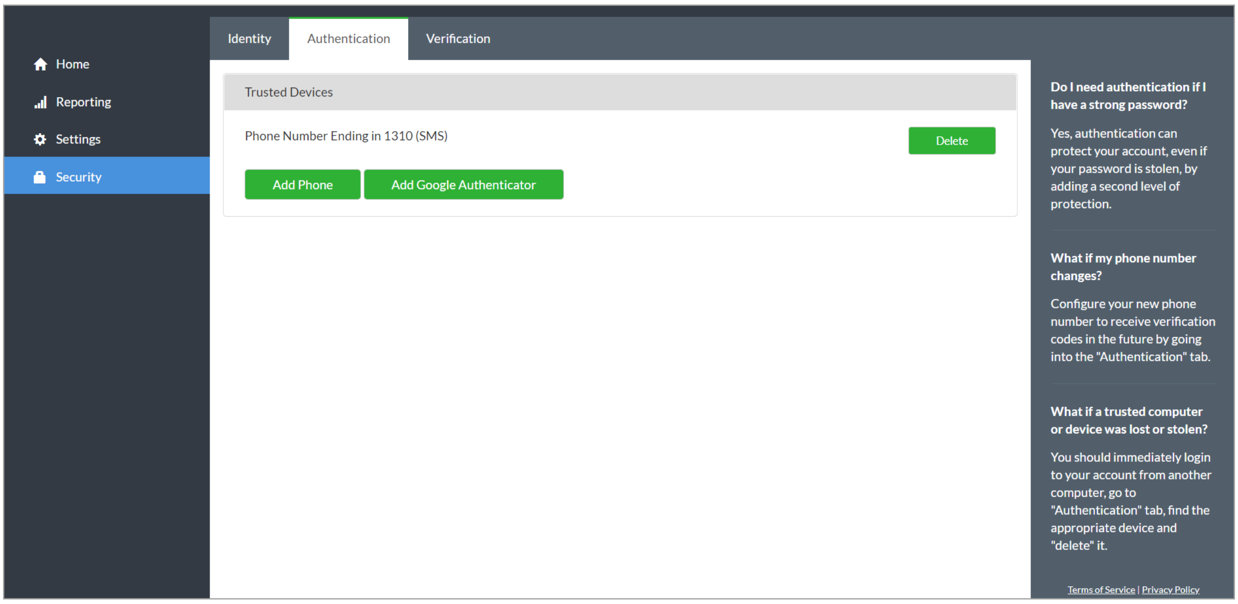
- If applicable, instruct merchant to check the "Trust Computer" box if they are using a personal computer, then click "Continue".



- Follow the steps for "Google Authenticator (optional)"



- Additional "phone numbers" can be added and/or "Add Google Authenticator"


Home
Reporting
Settings
Security
Identity
Authentication
Verification
Trusted Devices
Phone Number Ending in 1310 (SMS)
Delete
Add Phone
Add Google Authenticator
Do I need authentication if I have a strong password?
Yes, authentication can protect your account, even if your password is stolen, by adding a second level of protection.
What if my phone number changes?
Configure your new phone number to receive verification codes in the future by going into the "Authentication" tab.
What if a trusted computer or device was lost or stolen?
You should immediately login to your account from another computer, go to "Authentication" tab, find the appropriate device and "delete" it.
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Download Payment And Settlement Reports In Infusionsoft Payments Merchant Center

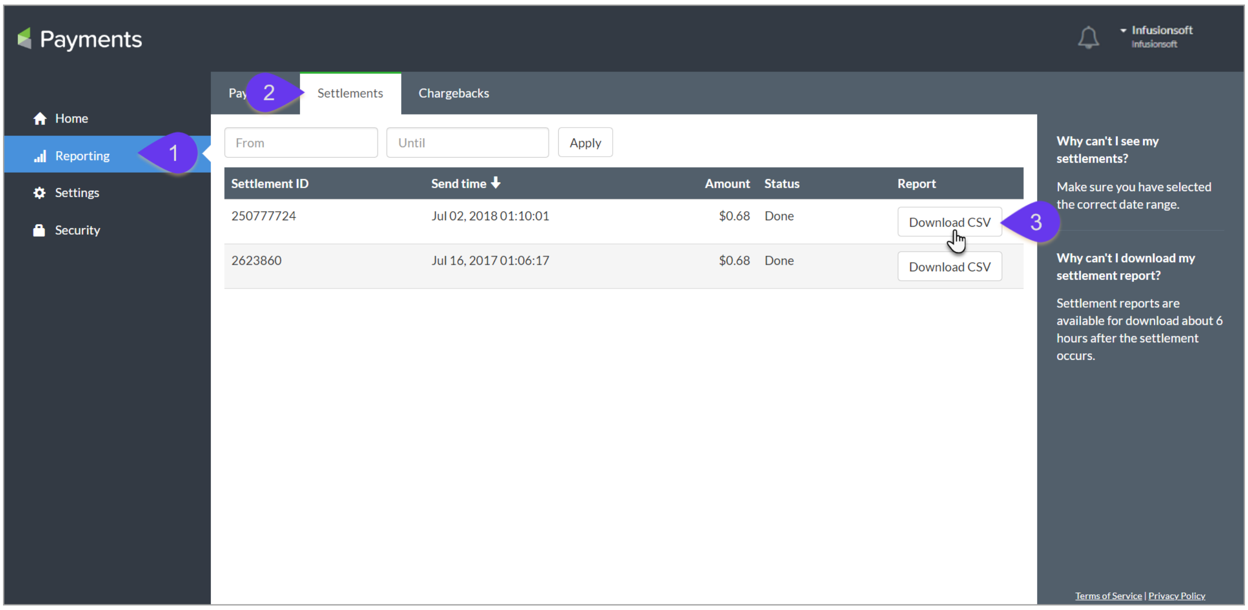
Last Modified on 08/01/2018 3:19 pm MST

With Infusionsoft Payments, you can generate and download Payments and Settlements reports, from within the Merchant Center. An email will be sent with a download link for your report after it is generated. Please note that there is a 24-hour data delay for Transactions reports and a 6 hour data delay for Settlement Reconciliation reports.

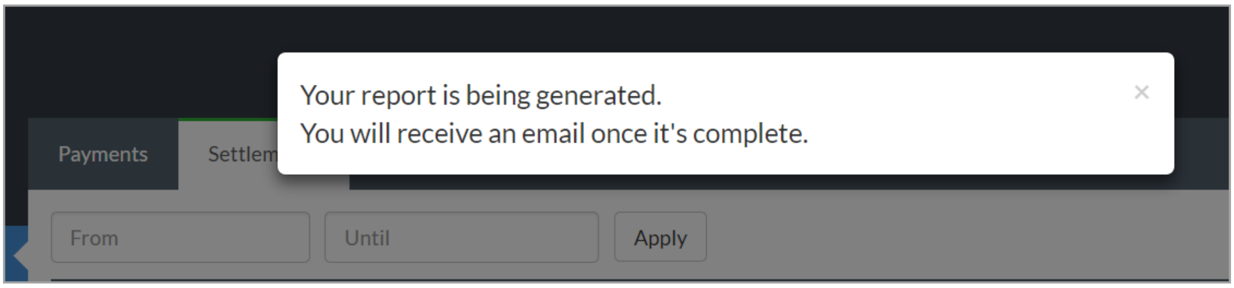
How to download a Transaction Report

1. Click on Reporting in the menu on the left-hand side of the page.
2. Click the Settlements tab.
3. Click the Download CSV button next to the Settlement you want to reconcile.

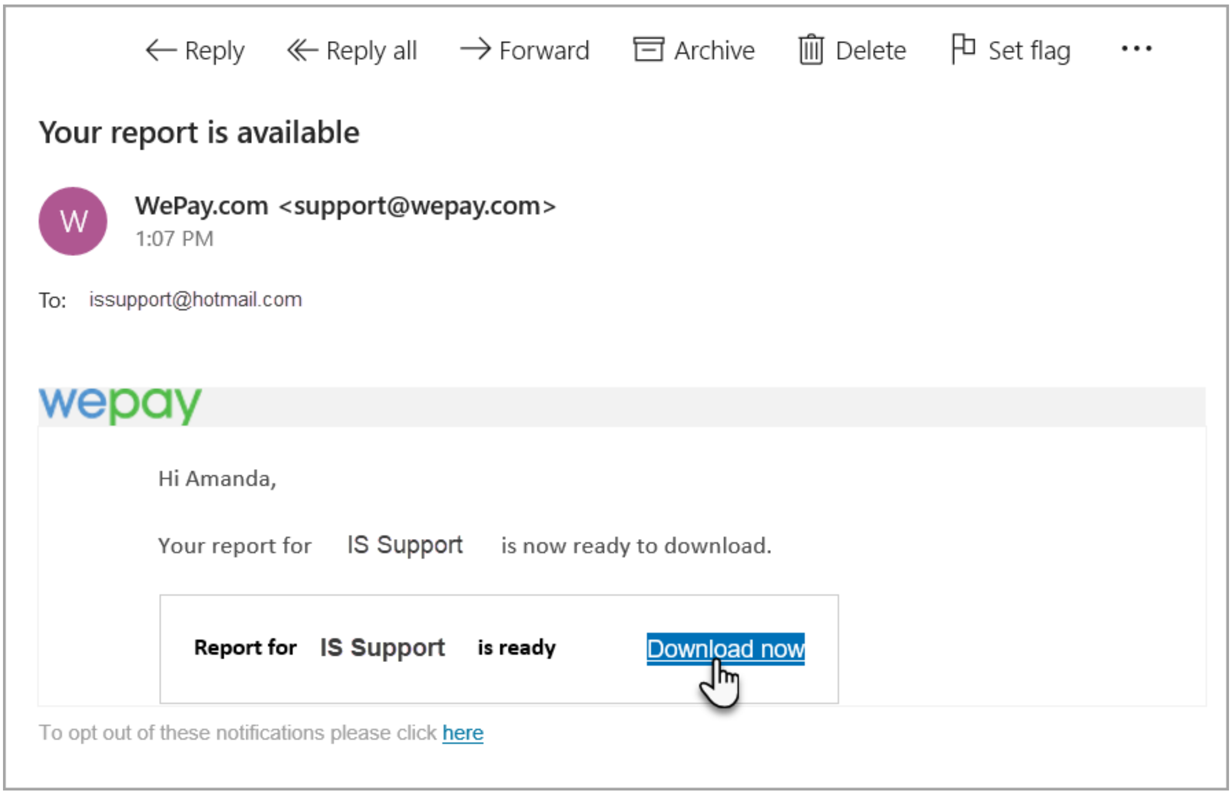
   Please note: Settlement Reports are available 6 hours after the settlement occurs



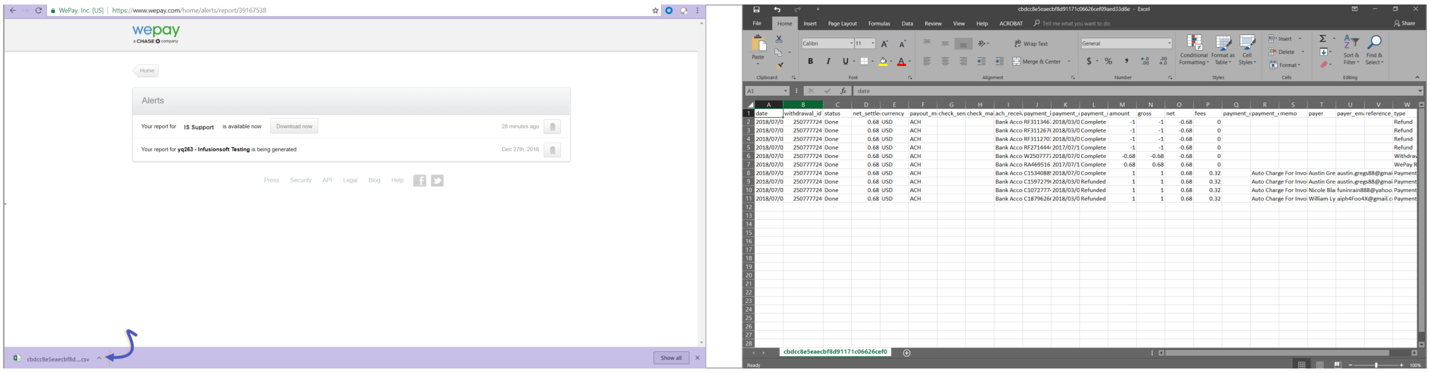
4. Once the Download CSV button is clicked you will see a pop-up that says "Your report is being generated, an email will arrive when it's ready"



5. Once the email arrives, click the Download Now button

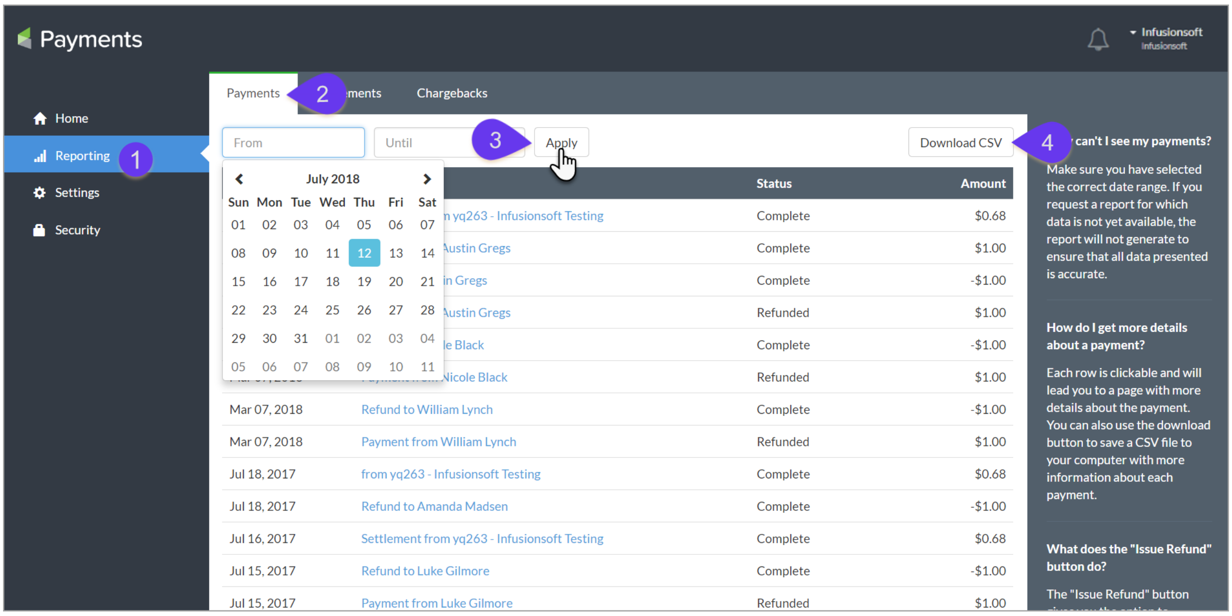


- If you are still logged into your Merchant Portal the report will download automatically
- If you're not logged in, then you will directed to the WePay signin page. Once logged in, the report will automatically download.

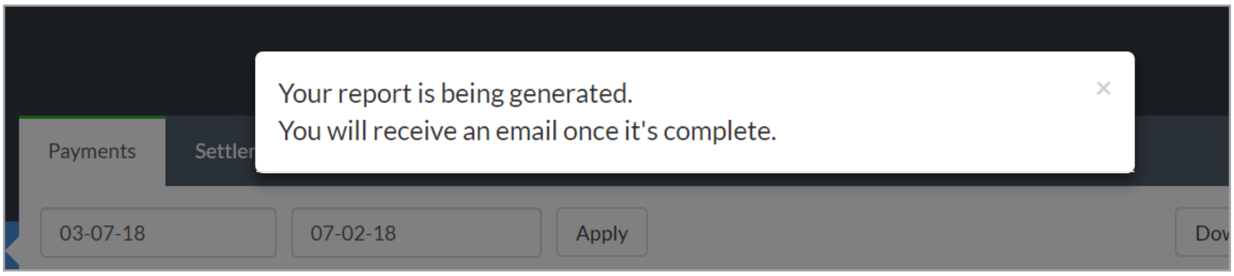


View Transaction History Report

- Click on Reporting in the menu on the left-hand side of the page.
- Click the Payments tab.
- Choose a date range for the transactions the merchant would like to download, then click Apply.
- Click the Download CSV button next to the Date Range.

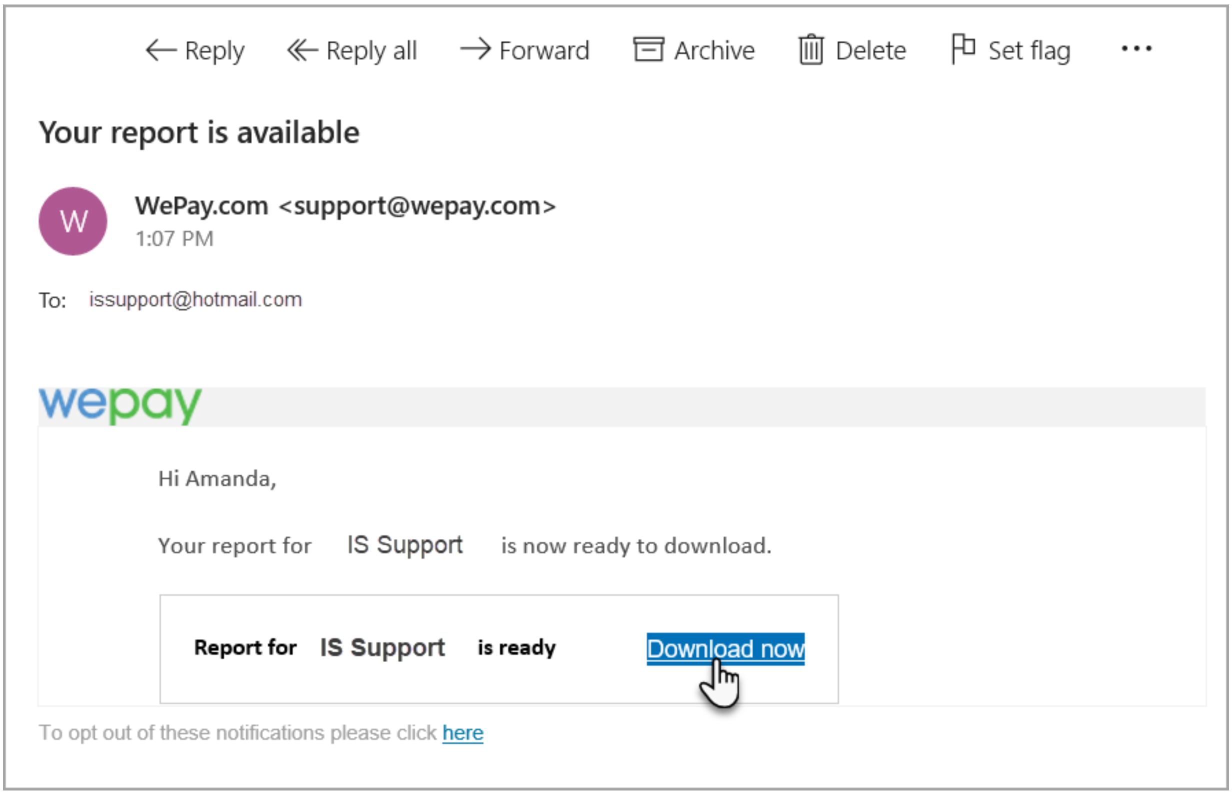


- Once the Download CSV button is clicked they will see a pop-up that says "Your report is being generated, an email will arrive when it’s ready"



Please note: Transaction History Reports will be emailed within 24 hours of request.

- Once the email arrives, click the Download Now button in the merchant’s email notification



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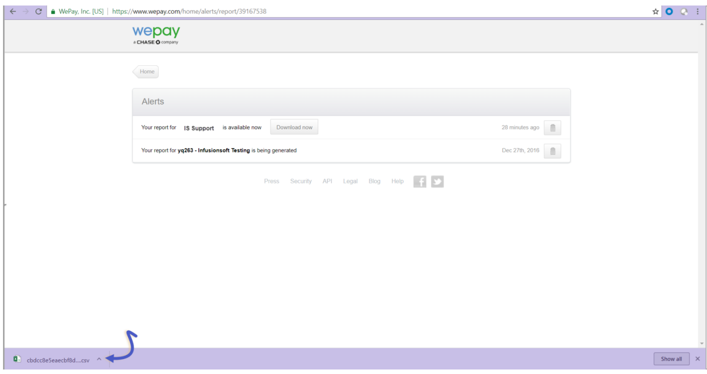
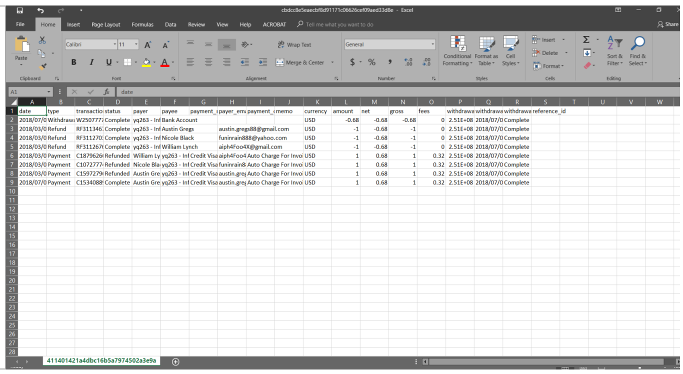
- If you're not logged in, then you will directed to the WePay signin page. Once logged in, the report will automatically download.





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Issuing A Refund Within Infusionsoft Payments Merchant Center

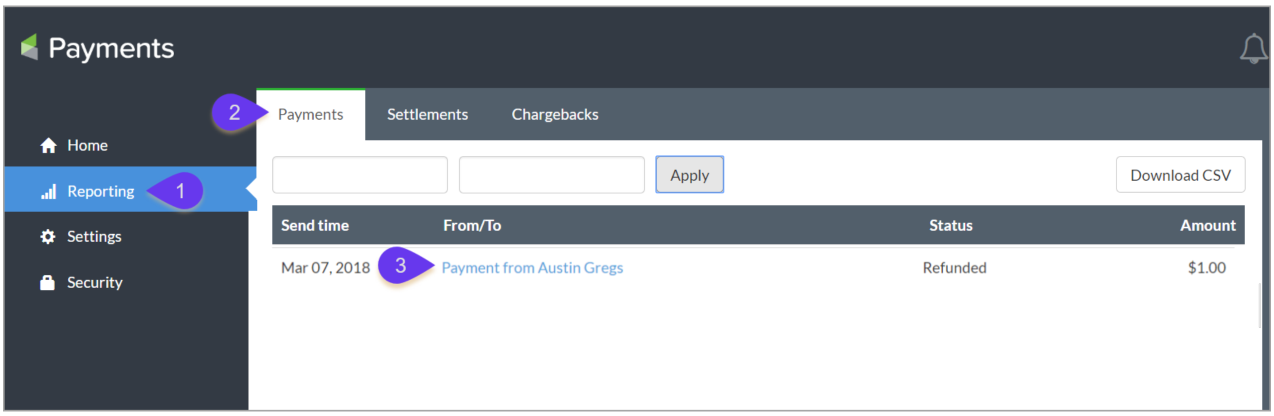
Last Modified on 08/27/2018 11:17 am MST

Below are the steps to issue a refund of payment, directly through the Infusionsoft Payments Merchant Center. Most refunds are able to be processed via the contact's order record in infusionsoft. If for any reason you need to refund a payment through the Merchant center, follow these steps.

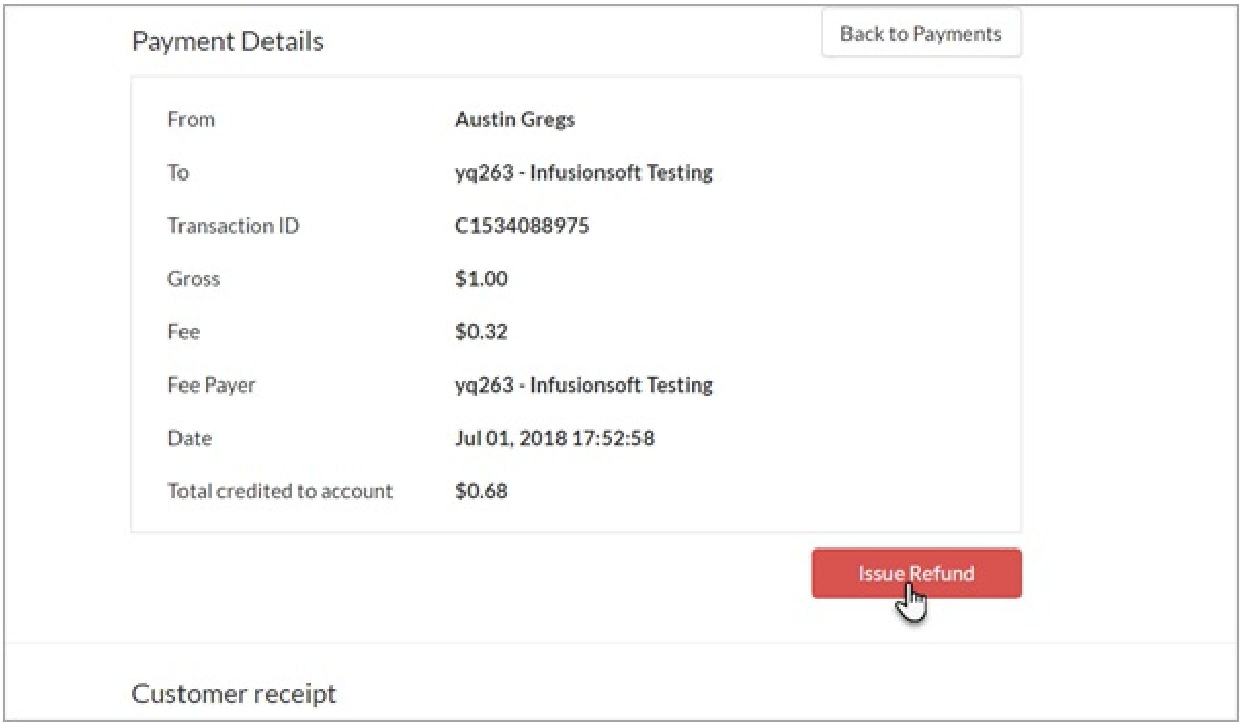
Important Note! If a refund is processed directly through the Infusionsoft Payments, this will not reflect on the contact's order in Infusionsoft. Please review and address any manual adjustments/refunds to the contact's order in Infusionsoft, manually.

Important Note! Refunds that are older than 60 days and/or amounts $5,000 or more cannot be refunded though your Merchant Portal. Please contact support to make a request to process the refund.

- Click on Reporting in the menu on the left-hand side of the page.
- Under the Payments tab locate the payment you wish to refund and click the link under "From/To".

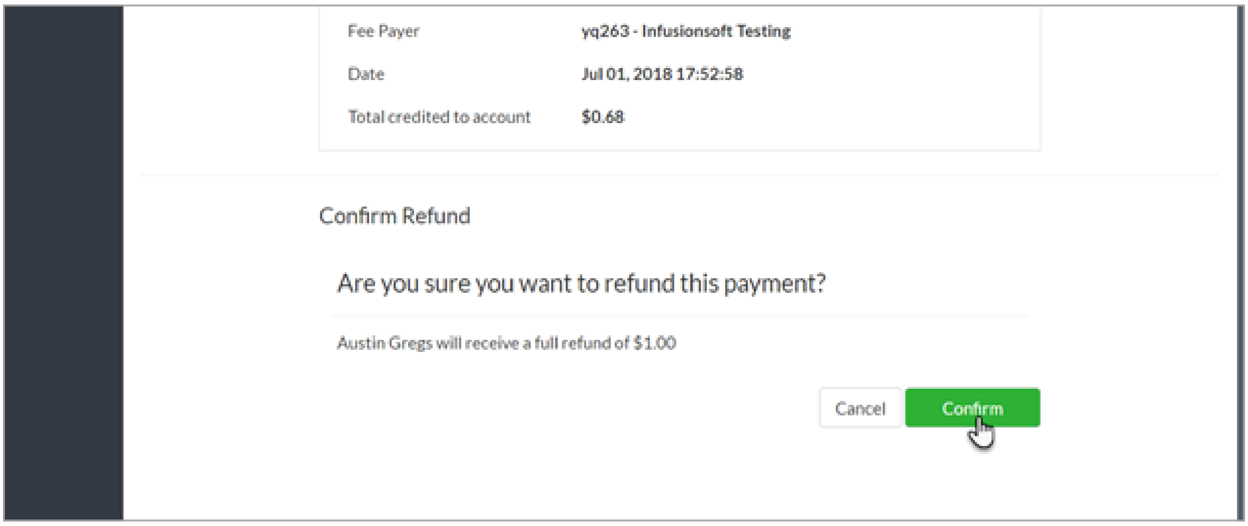


- Click the "Issue Refund" button on the payment details page.



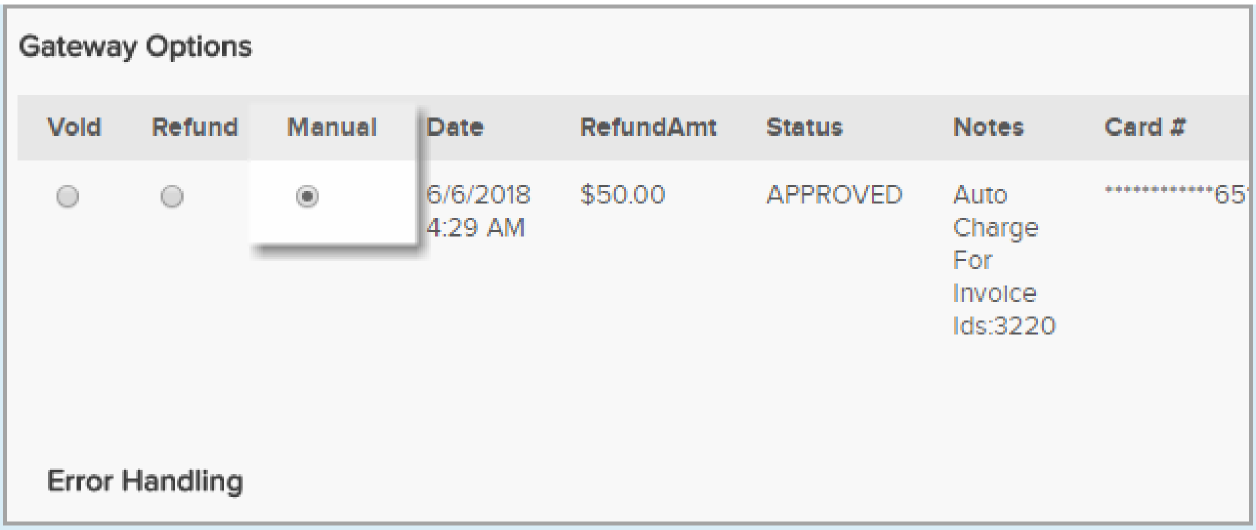
- **Please note:** If the charge is still pending the "Issue Refund" button will not be visible on this page.

- Click the "Confirm" button to process the refund.



- If successful, great you are done!

Pro Tip: issue a manual refund in your Infusionsoft app to balance their account.


Gateway Options
Void
Refund
Manual
Date
RefundAmt
Status
Notes
Card #
6/6/2018 4:29 AM
$50.00
APPROVED
Auto Charge For Invoice Ids:3220
Error Handling

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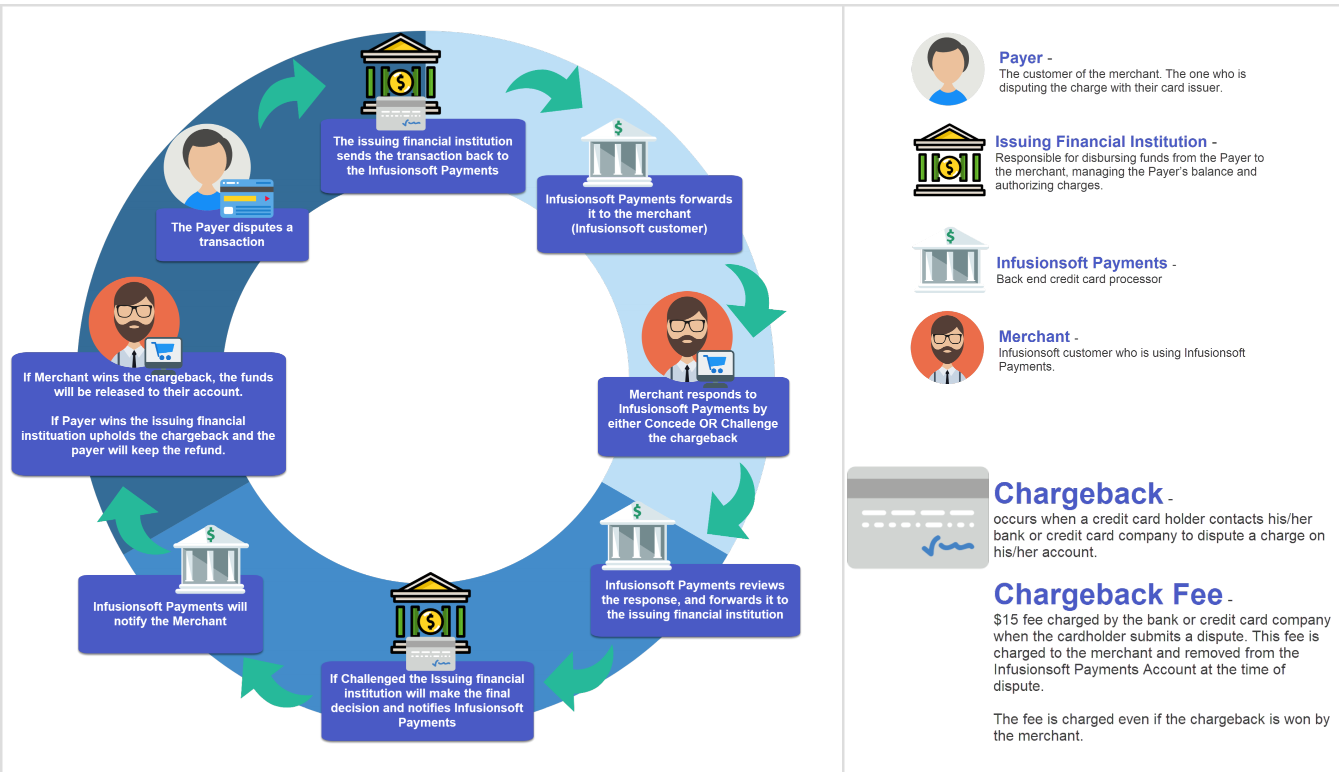
Handling A Charge-back Within Infusionsoft Payments Merchant Center

Last Modified on 08/01/2018 5:16 pm MST

Merchants that use Infusionsoft payments can address any charge-backs via the Infusionsoft Payments Merchant Center. Below are steps to address any charge-backs on payments you have received.

Important Note! Chargebacks need to be responded to within 3 business days. The full chargeback resolution can take up to 45 calendar days

Pro tip! Click on images to view larger



- Concede Chargeback - No further action necessary - customer is refunded a.**Concede** Chargeback - No further action necessary - customer is refunded

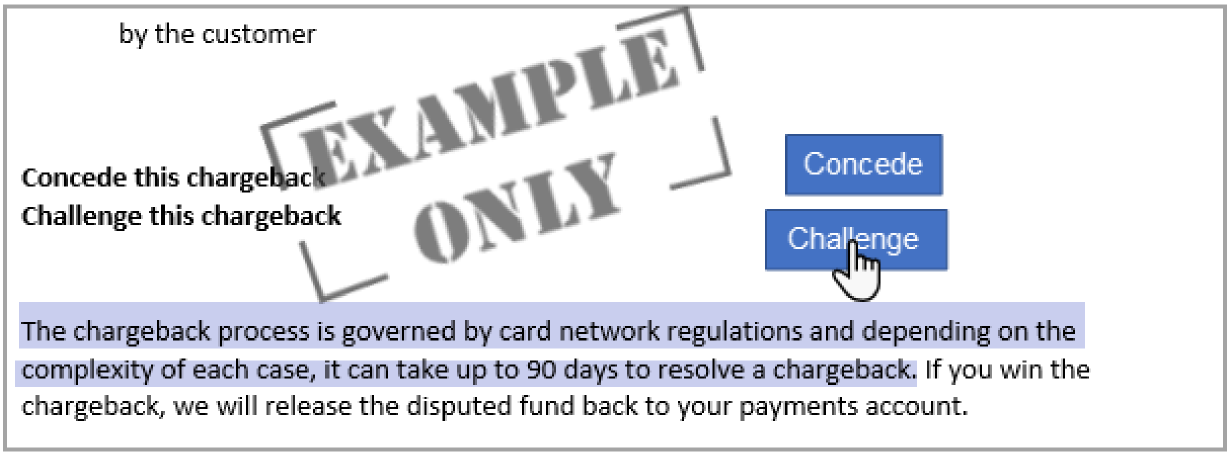
b.**Challenge** Chargeback – Is for disputing the chargeback and that you state the charges are valid.

Submit any documentation to prove charge is valid

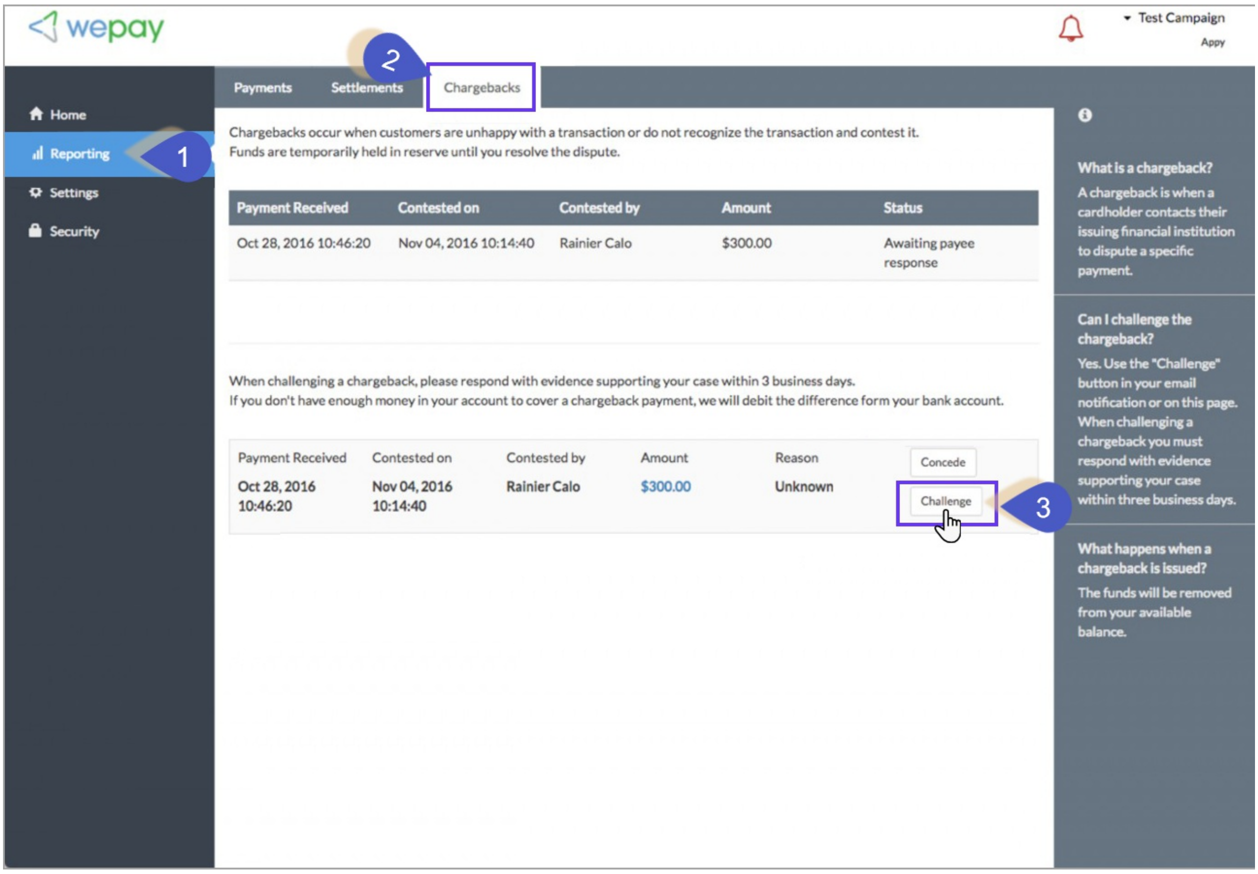
- Shipping receipts
- Signed TOS (Terms of Service)
- Email communications between merchant and customer
- Invoices
- Anything documenting that is a consensual purchase and the customer understood what they were purchasing

How to Challenge the Chargeback

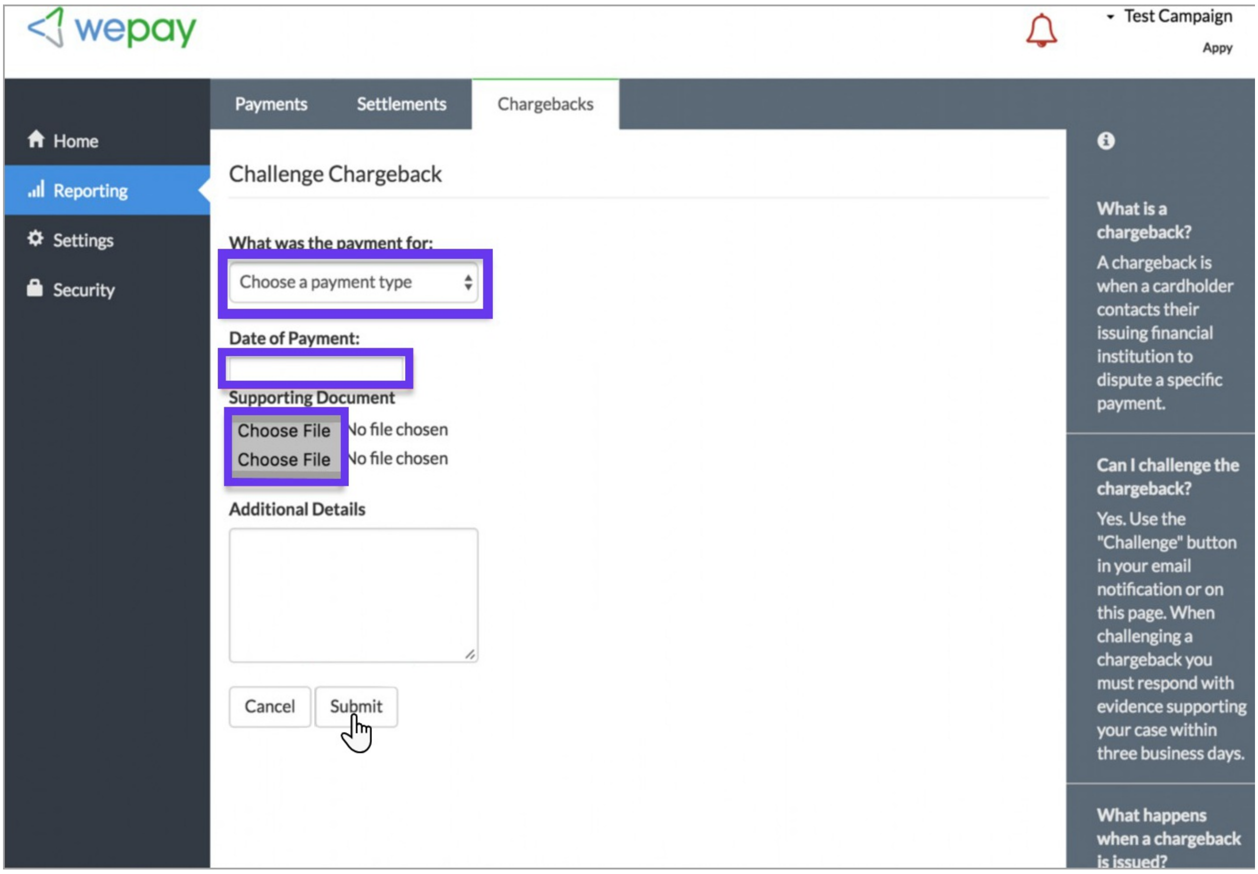
From Email - will take them directly to the file upload



- From Merchant Portal - Click **Reporting** on the left > Choose the **Chargebacks** tab > Click the **Challenge**

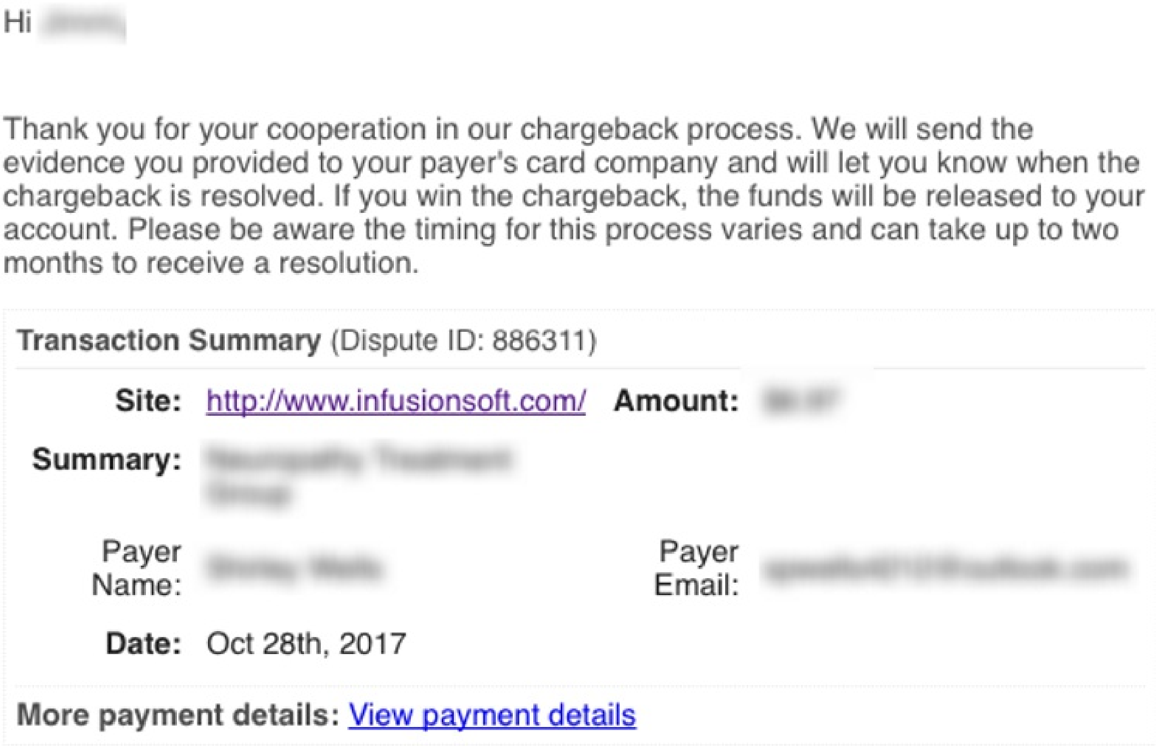


- Both options will end up here:



- Fill in the payment type, date of payment, attach supporting documentation like signed contracts, work orders, and/or the tracking confirmation, and add additional details. Click HERE if you are unable to submit the documentation.

- You will then receive an email that WePay is disputing the chargeback on your behalf.



Hi

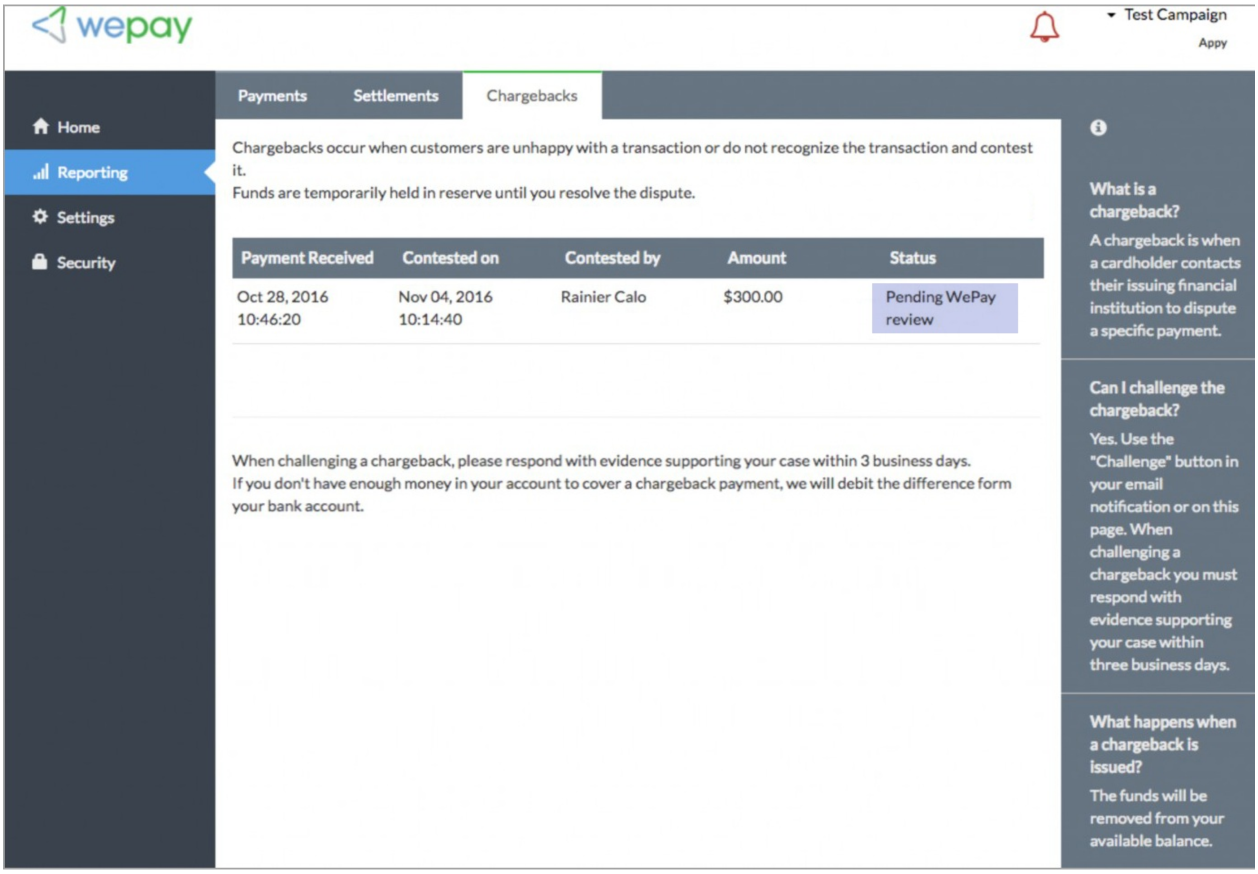
Thank you for your cooperation in our chargeback process. We will send the evidence you provided to your payer's card company and will let you know when the chargeback is resolved. If you win the chargeback, the funds will be released to your account. Please be aware the timing for this process varies and can take up to two months to receive a resolution.

Transaction Summary (Dispute ID: 886311)

Site:	http://www.infusionsoft.com/	**Amount:**	
Summary:			
Payer Name:		Payer Email:	
Date:	Oct 28th, 2017		

More payment details: View payment details

- The Status of chargebacks can be viewed at any time, from the the Chargebacks tab, under their Merchant Center Reporting section. The merchant will see "**Pending WePay review**" as the status.



If you are unable to submit the documentation through the WePay Merchant Center, try the following actions:

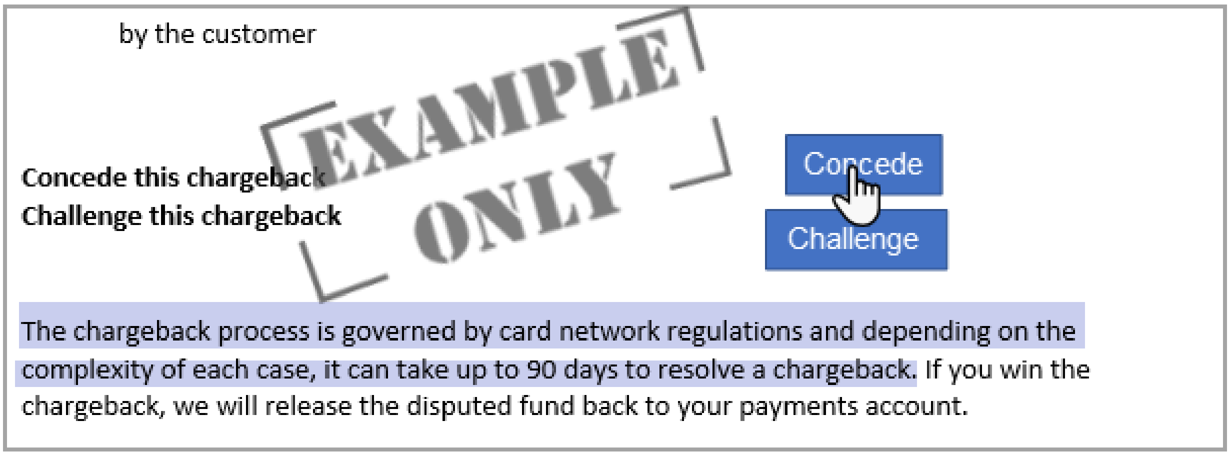
- Clear cached files in web browser
- Reset web browser
- Use another web browser entirely (Google Chrome recommended)
- Use a desktop/laptop instead of a mobile device

If the steps above do not work you can respond to the email you received notifying you of the chargeback. Attach the dispute documentation to the email, which will open a ticket with WePay directly and get them the documentation for submission. WePay Support may respond directly to you through this email exchange.

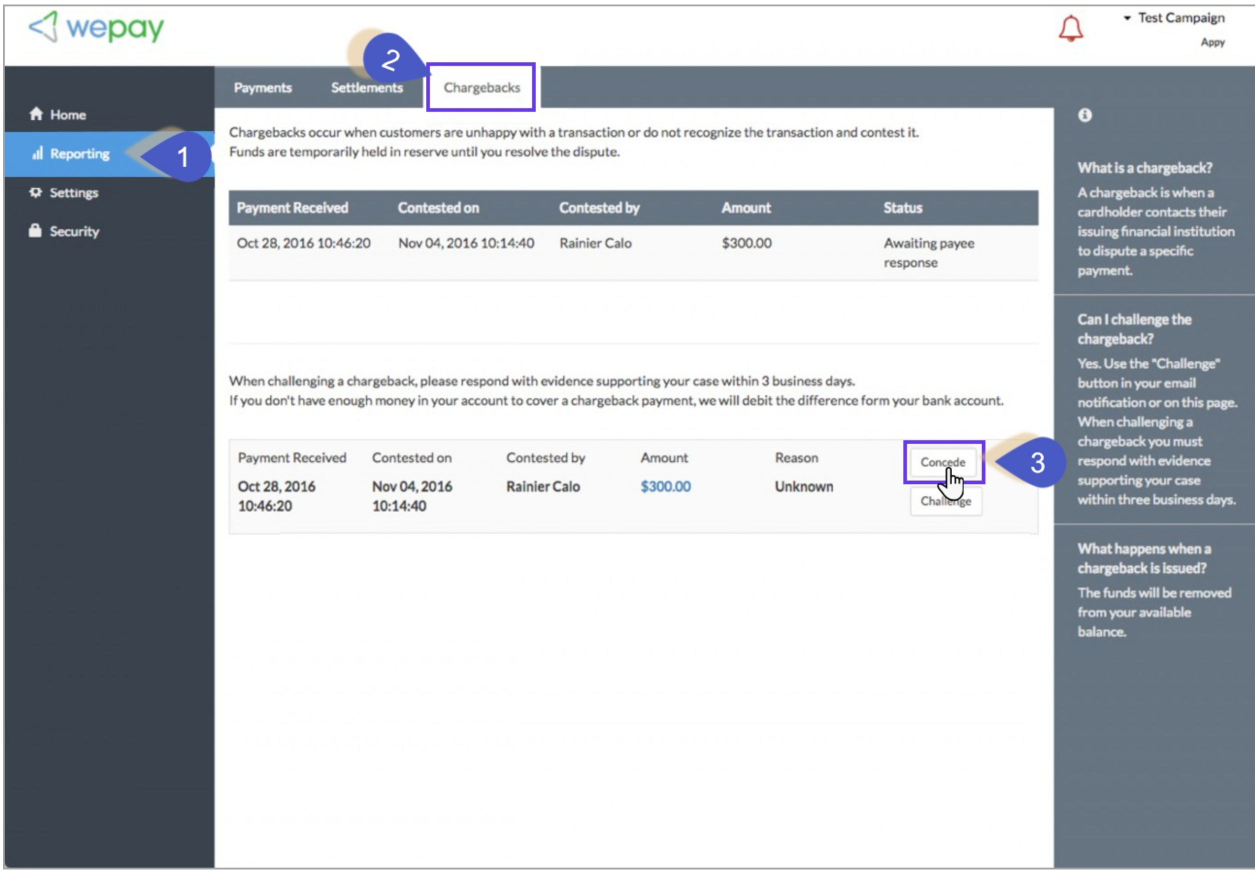
How to Concede

Pro tip! Click on images to view larger

- From Email - will take you directly to the Merchant Portal Chargebacks tab

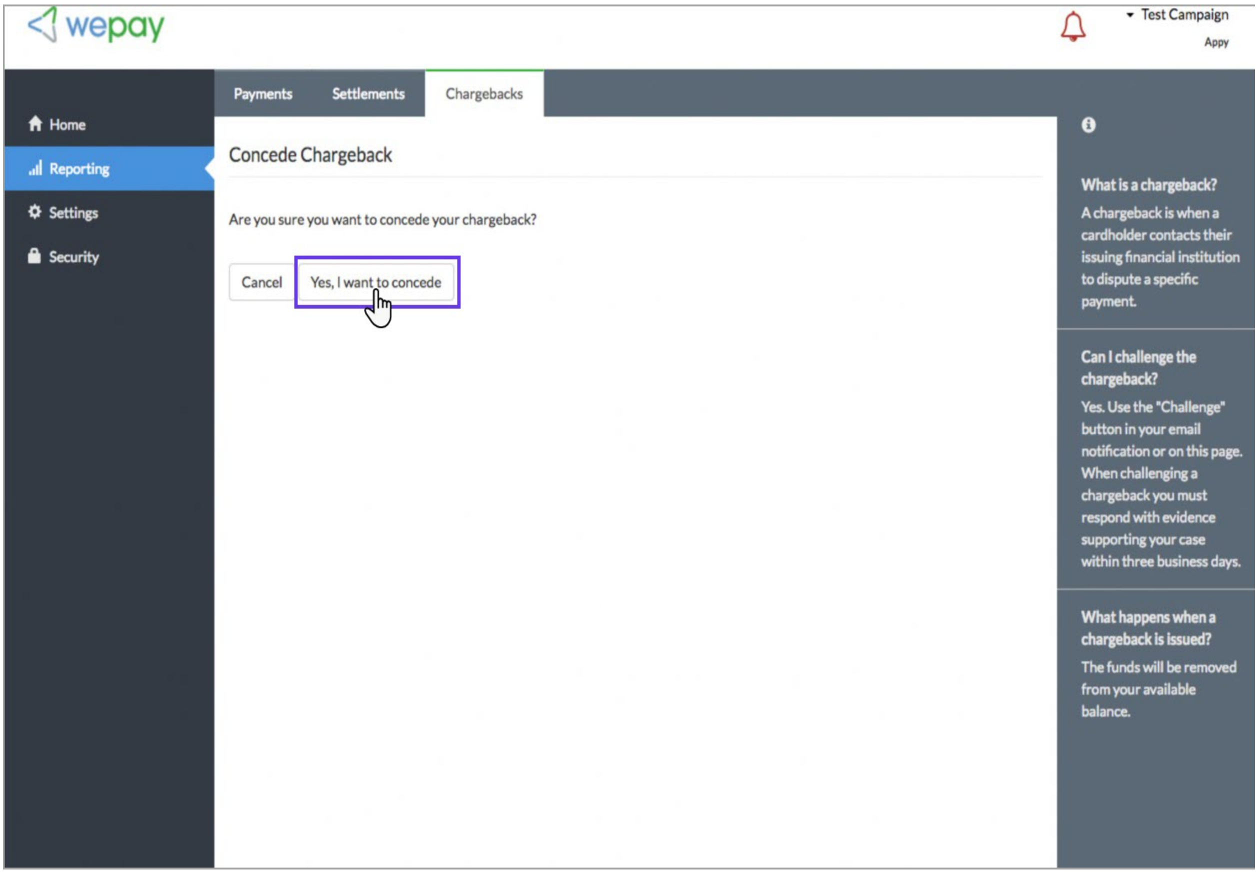


- From Merchant Portal - Click **Reporting** on the left > Choose the **Chargebacks** tab > Click the **Concede**

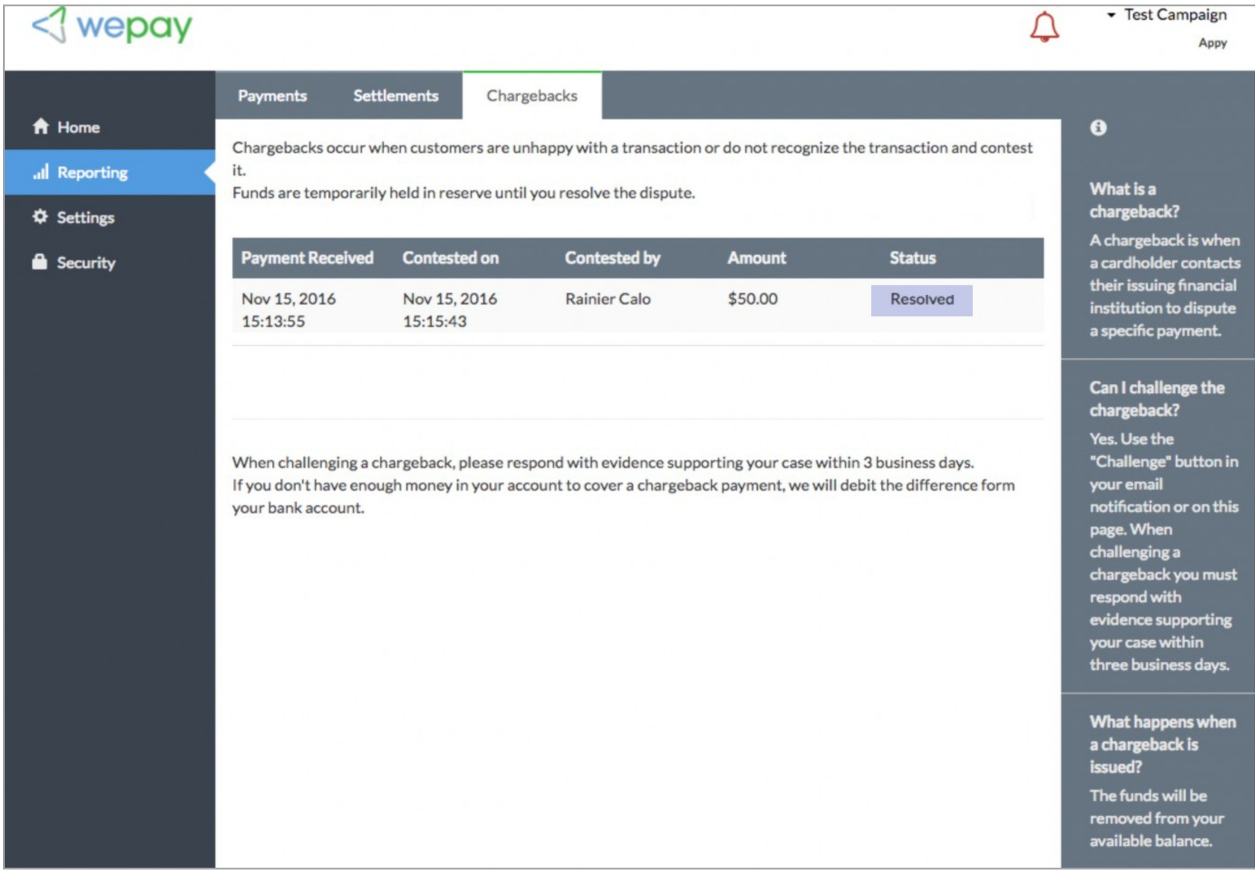


- Both options will end up here:

- Click the **"Yes I want to Concede"** button.



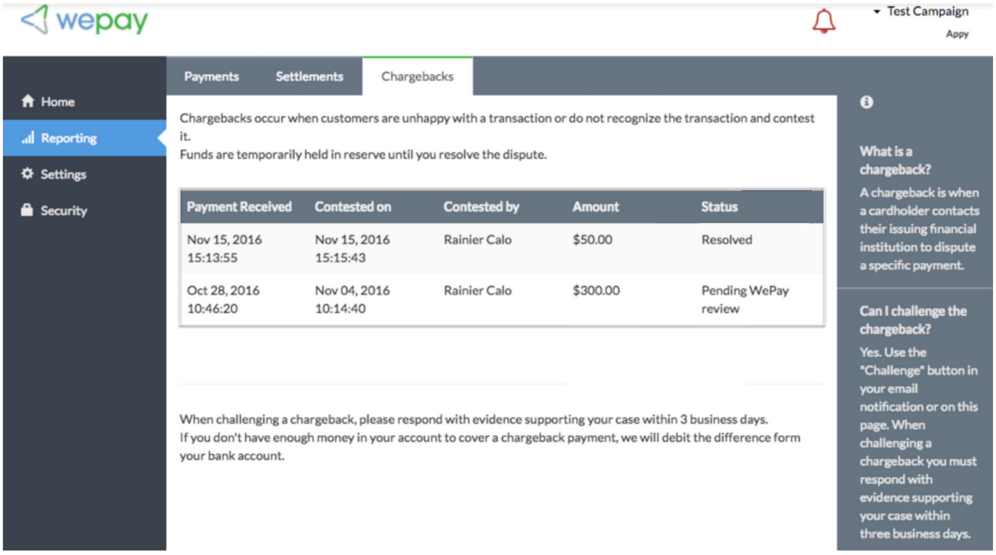
- The Status of chargebacks can be viewed at any time, from the the Chargebacks tab, under their Merchant Center Reporting section. You will see "**Resolved**" as the status.



View Chargeback Status

Once you have **Challenged** or **Conceded** you may see the following statuses.

- **Pending WePay review** – Chargeback has been challenged and WePay is challenging the chargeback on behalf of the customer.
- **In review** – WePay has submitted the chargeback documentation and the card issuing bank is reviewing the documentation to make a decision on the chargeback.
- **Resolved** – A chargeback decision has been made and the merchant either won or lost the chargeback.



- **Unfortunately**, there isn't a great way to see if the chargeback was won or lost. You should check for the resolution email from Infusionsoft Payments titled "**Your chargeback has been resolved**"

    - 

Reply to any of the emails they did receive regarding their chargeback. This sends their request directly to WePay and creates a ticket. It's the fastest and easiest way to get updates.
    - **Review your** funds in your merchant account or your most recent settlement to see if the funds from the chargeback have been added back to your account.

To prevent fraud and the documentation needed to fight a Chargeback

Your website must communicate its refund policy to the cardholder in either of the following locations:

• In the sequence of pages before final checkout, with a "click to accept" or other acknowledgement

button, checkbox, or location for an electronic signature, or

• On the checkout screen, near the “submit” or click to accept button

The disclosure must not be solely on a link to a separate web page.

Refund policy on Receipts
Invoice: As a merchant, you are responsible for establishing your merchandise return and refund or cancellation **Policies**. Clear disclosure of these policies can help you avoid misunderstandings and potential cardholder disputes.

Address Verification Service (AVS) and **Card Verification Value 2** (CVV2) - This is something WePay already requires.

Prepayment. If the merchandise or service to be provided to the cardholder will be delayed, advise the cardholder in writing of the delay and the new expected delivery or service date.

Item Out of Stock. If the cardholder has ordered merchandise that is out of stock or no longer available, advise the cardholder in writing. If the merchandise is out of stock, let the cardholder know when it will be delivered. If the item is no longer available, offer the option of either purchasing a similar item or cancelling the transaction. Do not substitute another item unless the customer agrees to accept it.

Ship Merchandise Before Depositing Transaction. For card-absent transactions, do not deposit transaction receipts with your acquirer until you have shipped the related merchandise. If customers see a transaction on their monthly Visa statement before they receive the merchandise, they may contact their card issuer to dispute the billing. Similarly, if delivery is delayed on a card-present transaction, do not deposit the transaction receipt until the merchandise has been shipped.

Requests for Cancellation of Recurring Transactions. If a customer requests cancellation of a transaction that is billed periodically (monthly, quarterly, or annually), cancel the transaction immediately or as specified by the customer. As a service to your customers, advise the customer in writing that the service, subscription, or membership has been cancelled and state the effective date of the cancellation.

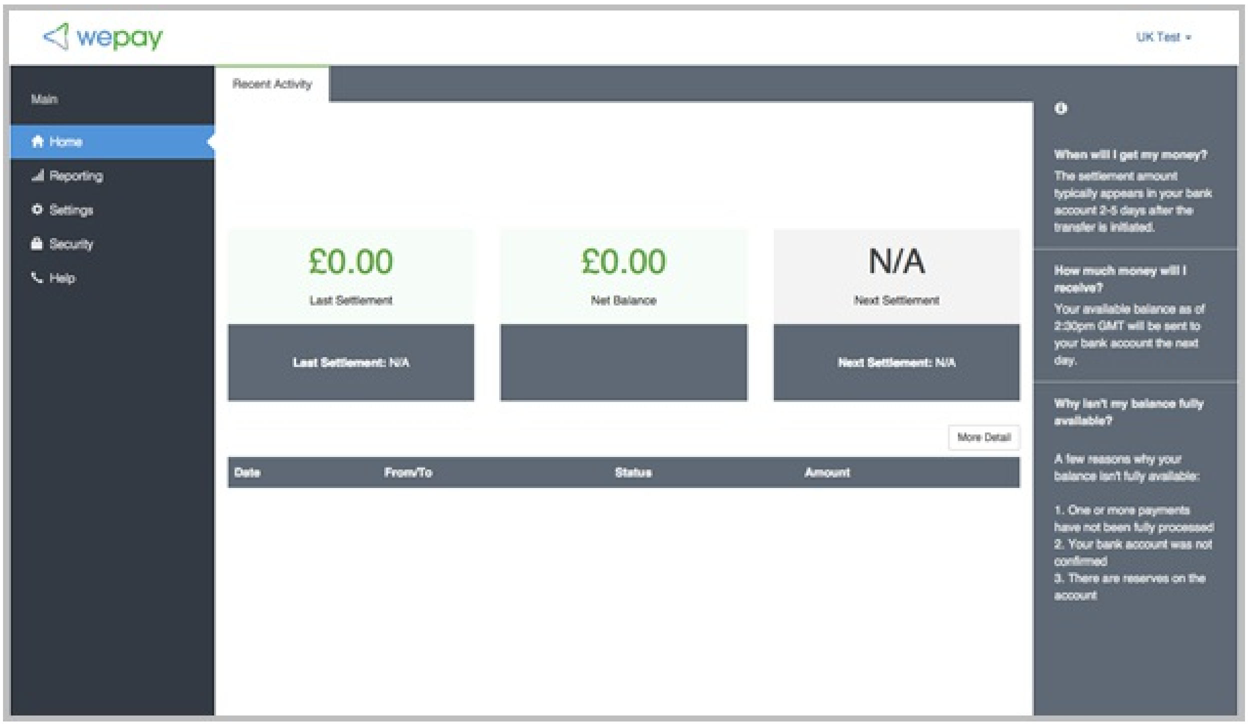
Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Payments UK Dashboard

Last Modified on 08/01/2018 3:21 pm MST

Home Page

When you first sign in to your dashboard, you will see three information boxes on the middle of the page:

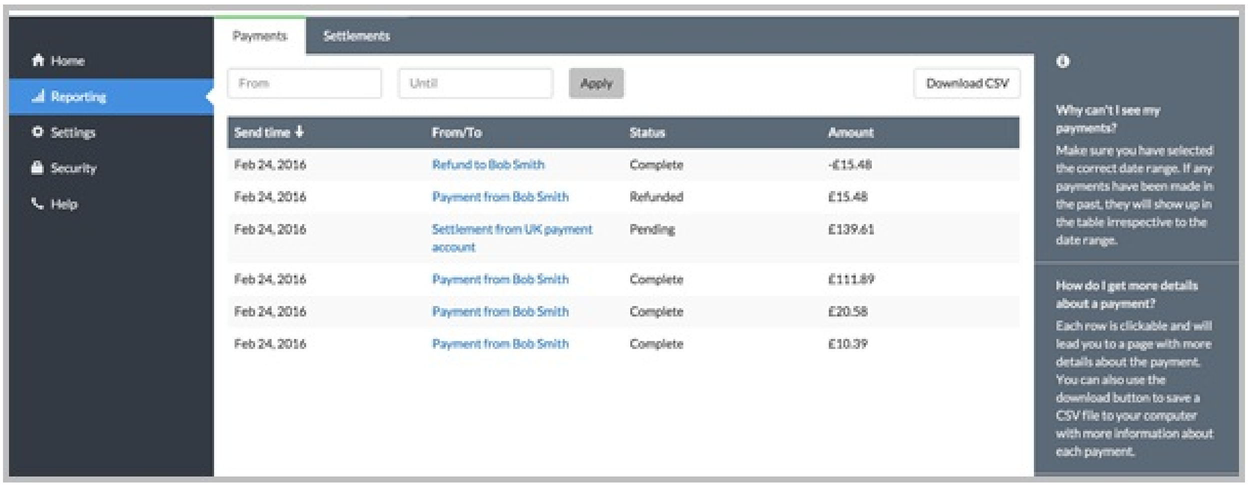


- **Last Settlement**: If there is a value listed here, it will also give a date as well.
- **Net balance**: This will show the current account balance.
- **Next settlement**: This may be different than the Net Balance depending on a few things.

If you would like to view more detailed information (such as fees and other information) click the **More Details** button on the page to gain some additional insight.

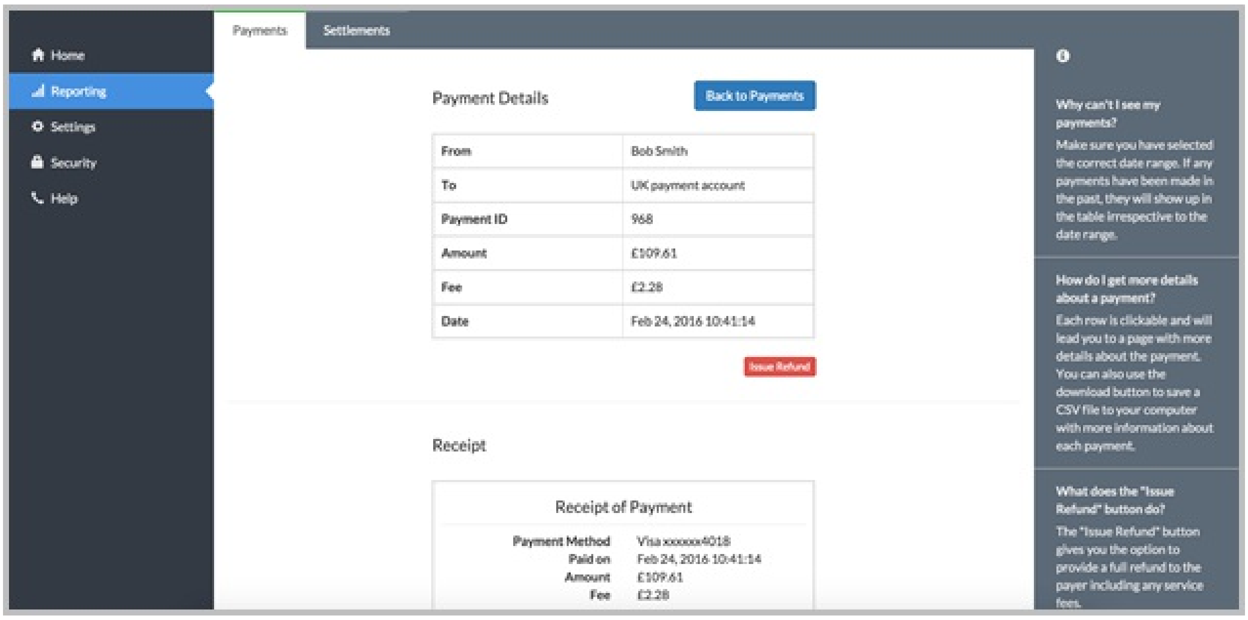
Reporting

Click on the **Reporting** tab to access Payments and Settlements reporting.



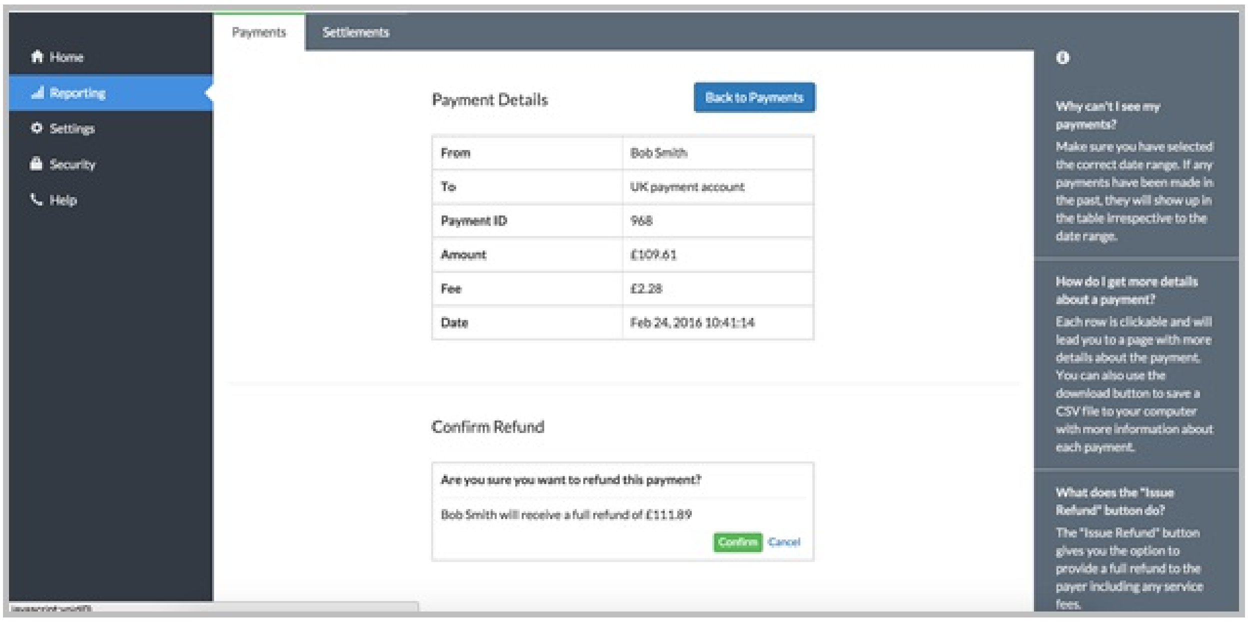
Payments

Under the **Payments** tab, we provide both the payment details and the receipt on the same page.



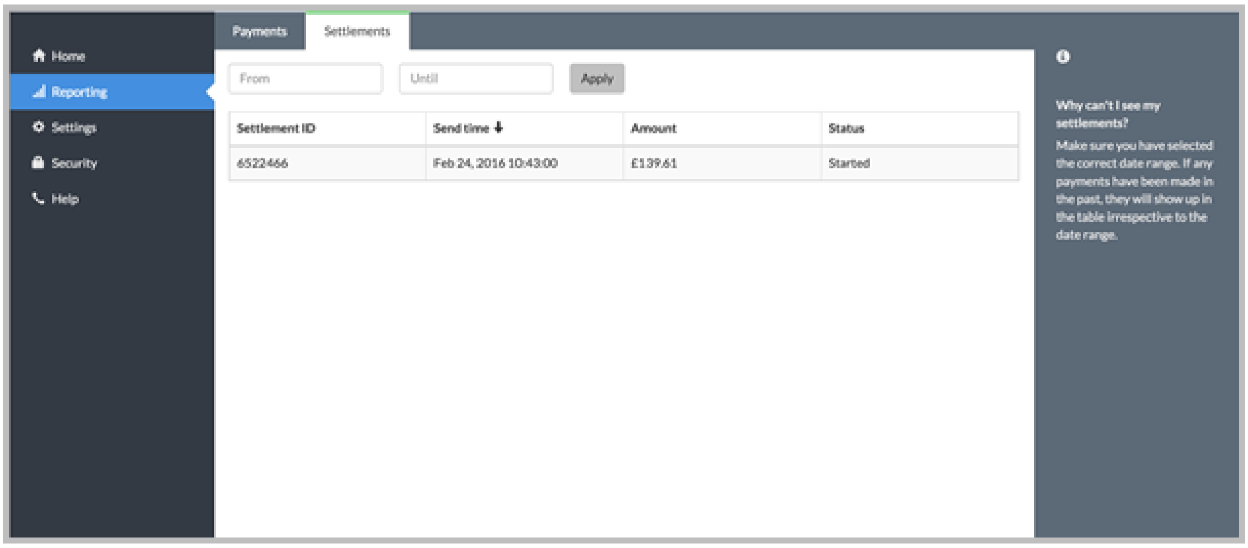
Refunds

Each payment will give you the ability to issue a refund. The refund option will be available for 90 days from the date of the transaction. If your account does not have a balance to support the refund amount request, you will be presented with a screen that will allow you to make the refund by entering in a debit (not credit) card for the payment.



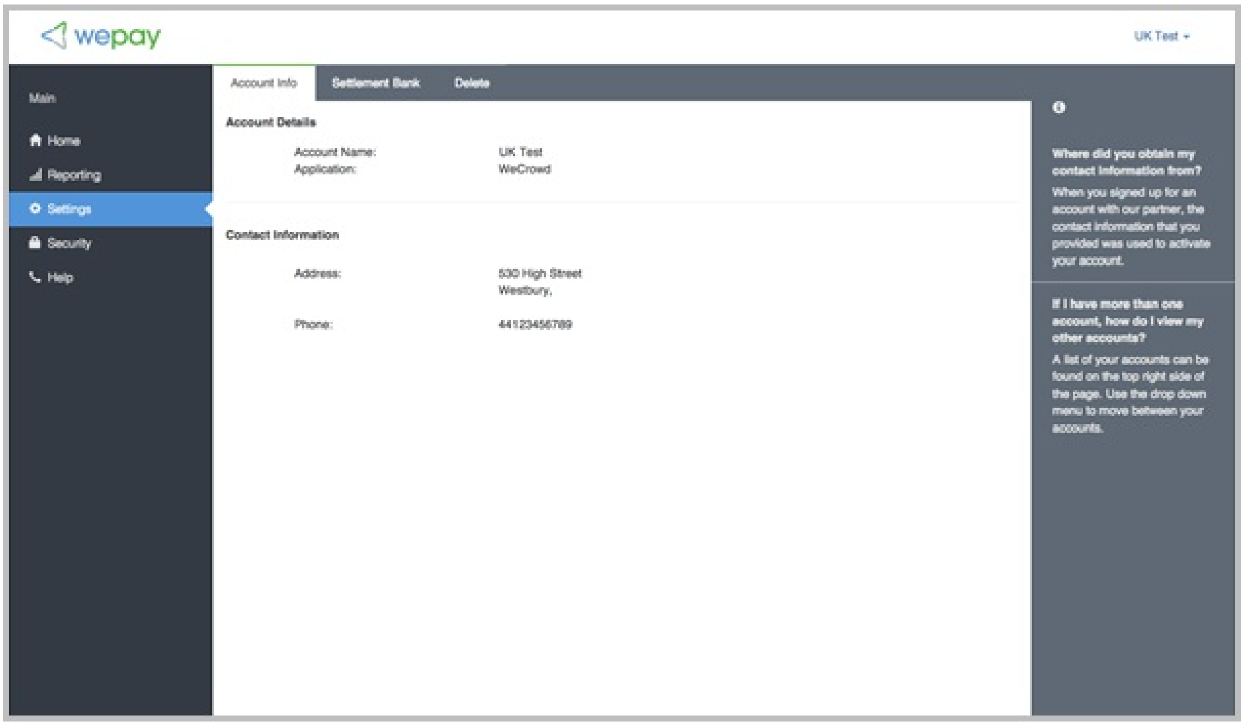
Settlements

This section provides you access to a list of all your withdrawals. You can look for a specific one by changing your date range and applying the changes.



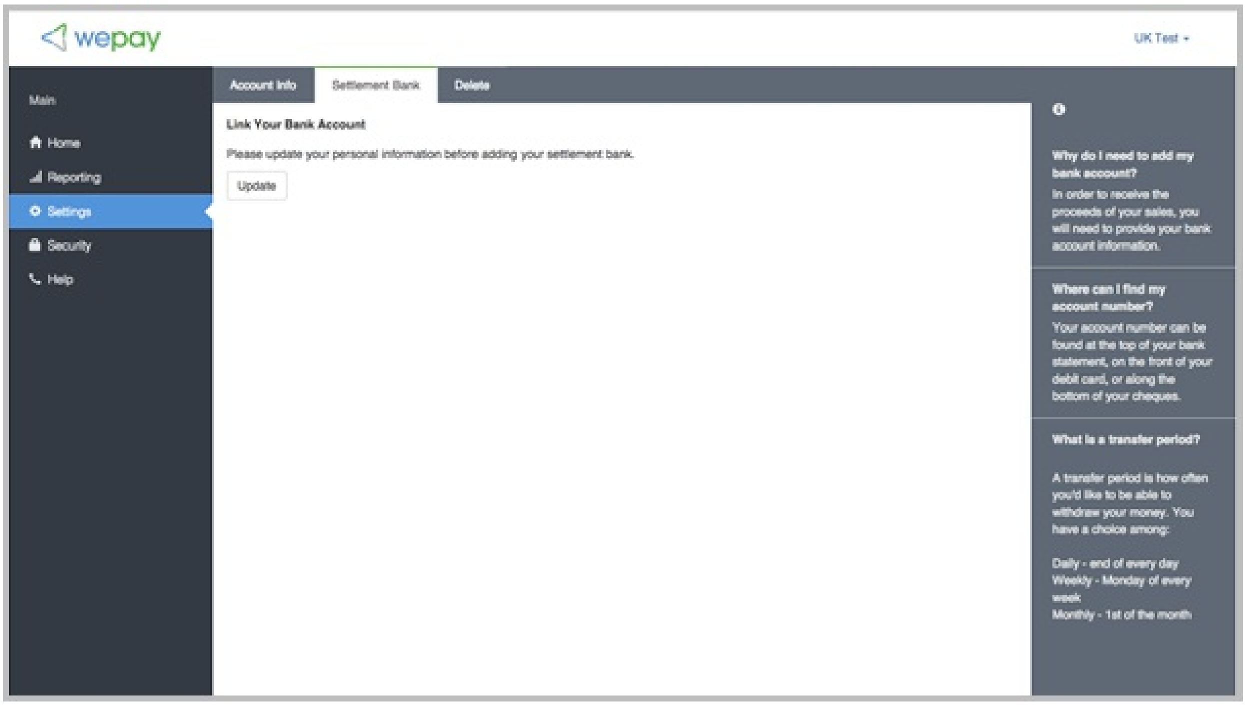
Account Info

Click the **Settings** tab to view your account information. Here, you'll see the account name you're viewing as well as the application that it's tied to.

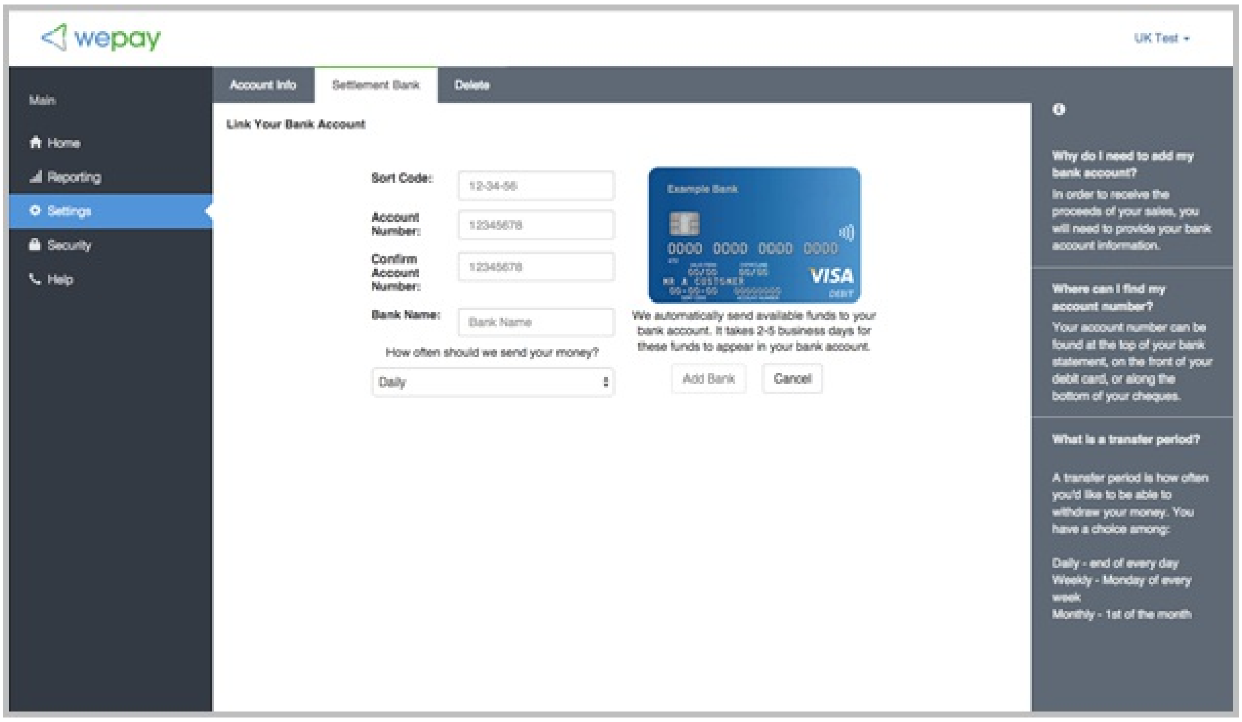


Settlement Bank

On the **Settlement Bank** tab, you have the ability to modify your linked bank account as well as your withdrawal frequency. If you haven't linked your bank account, you'll be prompted with an **Update** button.

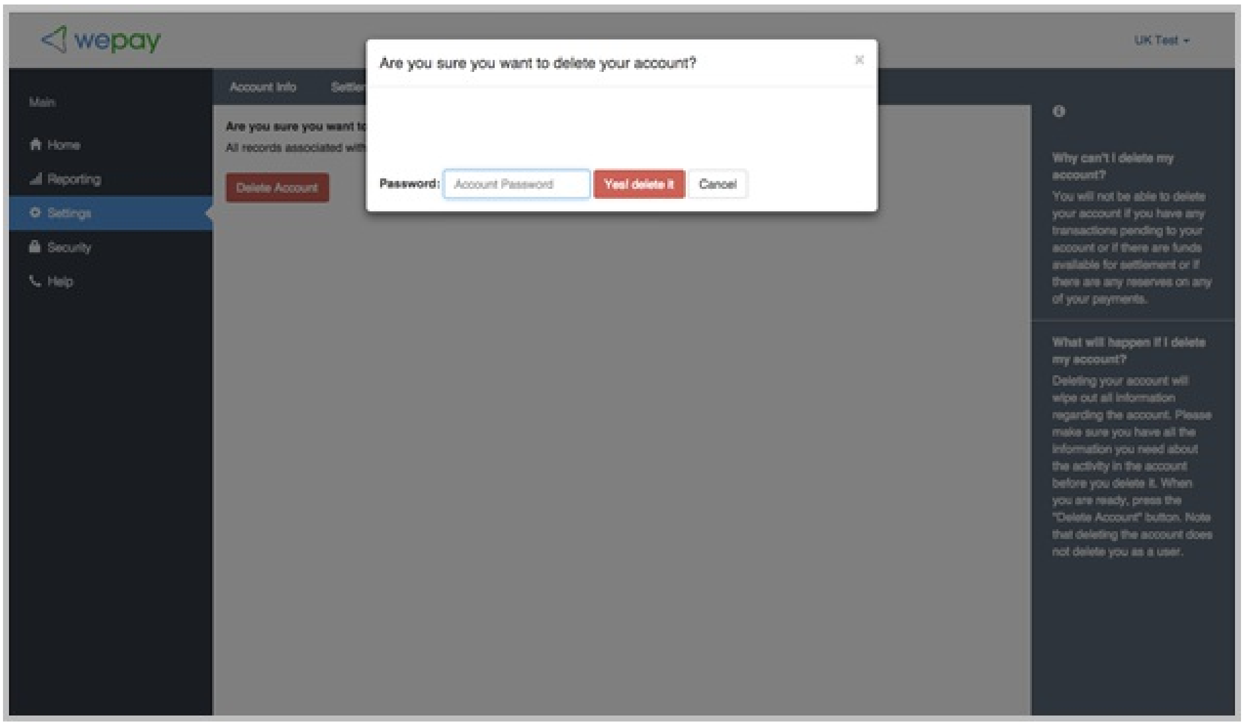


When updating your settlement bank information, you will be asked to enter your account number twice to help to ensure that accidental mistypes are minimized. UK bank accounts are typically denoted by a routing number called a 'sort code' which is six digits split into three groups (i.e. 20-30-40) and an account number that can be between 6 and 9 digits and can begin with zeros. You can find this information on the card itself as well.



Delete

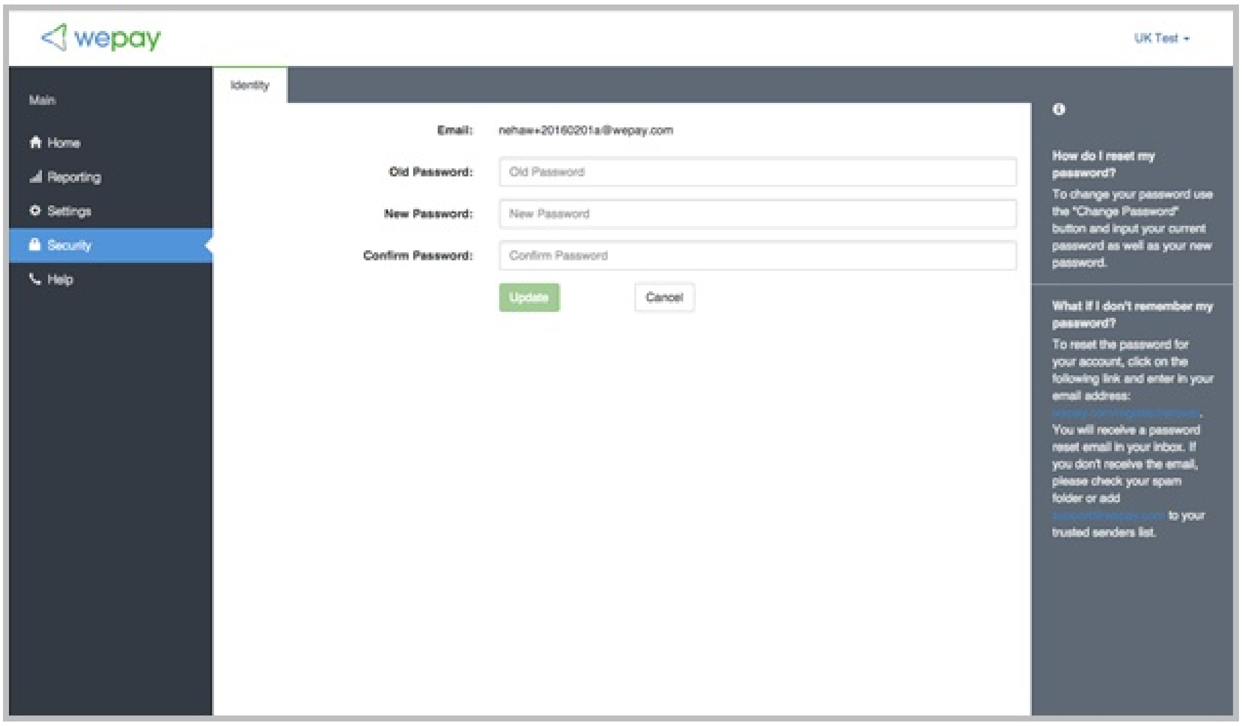
Clicking on the **Delete tab** will provide you access to the **Delete Account** option.



Warning! It's important to note that while you can click the **Delete Account** button, you will be allowed to proceed even if there are funds pending withdrawal. If you should choose to delete, you will be prompted with an additional level of verification. You will need to re-enter your account password and confirm "Yes! Delete it" to complete the action.

Security

Under **Security**, you will find the email and password associated with the account. You can update your password in this section.



More Questions?

- The primary Infusionsoft Payments FAQ which can be found here .
- The Infusionsoft Payments UK FAQ can be found here .

Using a different version of Infusionsoft? Click Here to learn more

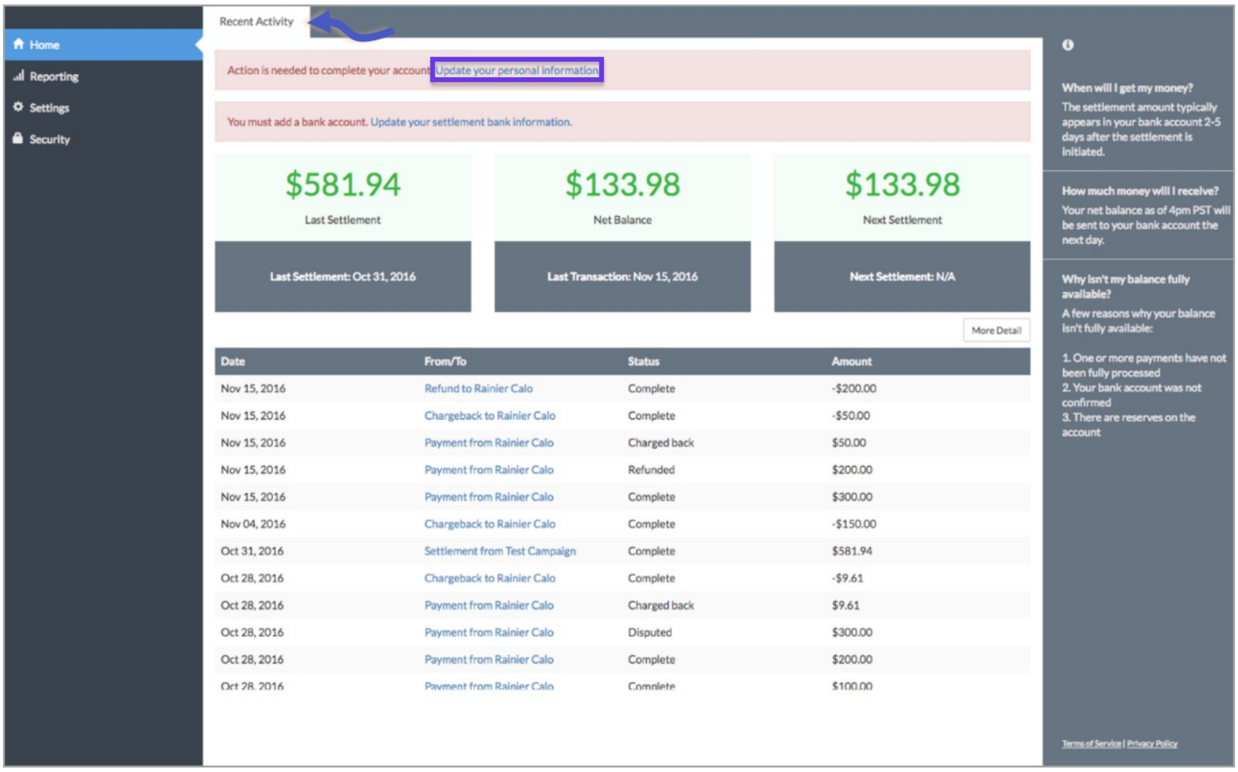
Verifying Customer Identify KYC

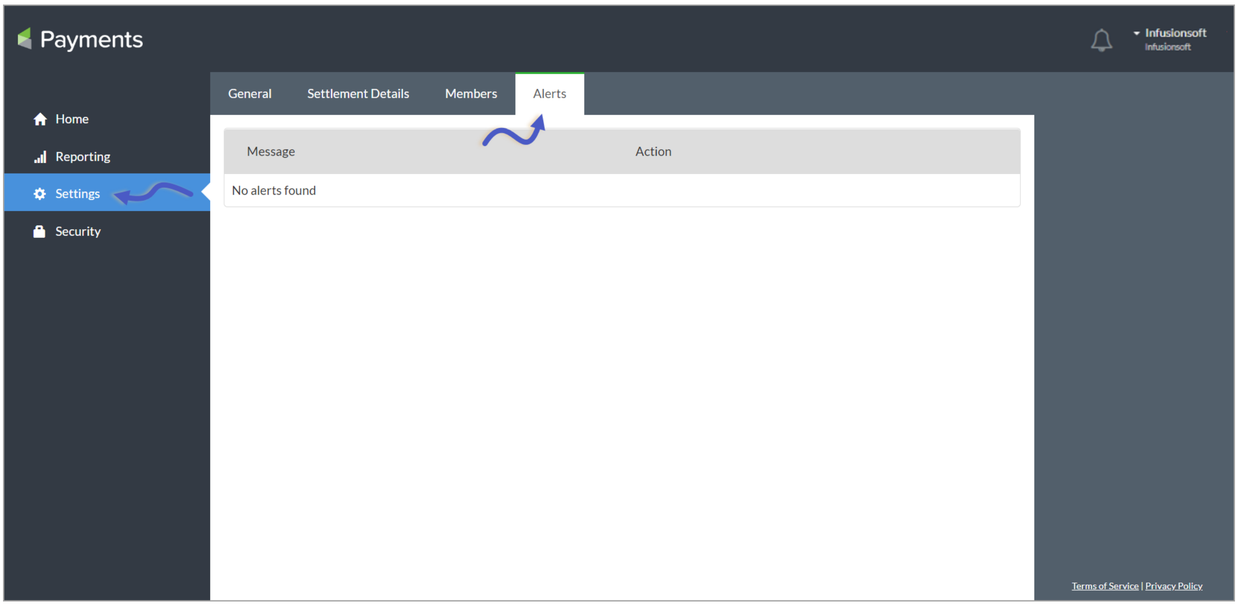
Last Modified on 08/27/2018 12:32 pm MST

If KYC needs to be entered, you will see an alert at the top of your homepage that says "Action is needed to complete your account. Update your personal information."

You'll also see this in the Alerts section of their account. Settings > Alerts

KYC – Know your customer ('KYC') is the process of verifying the identity of a customer/merchant and their business. The term is also used to refer to the bank and anti-money laundering regulations which governs these activities.



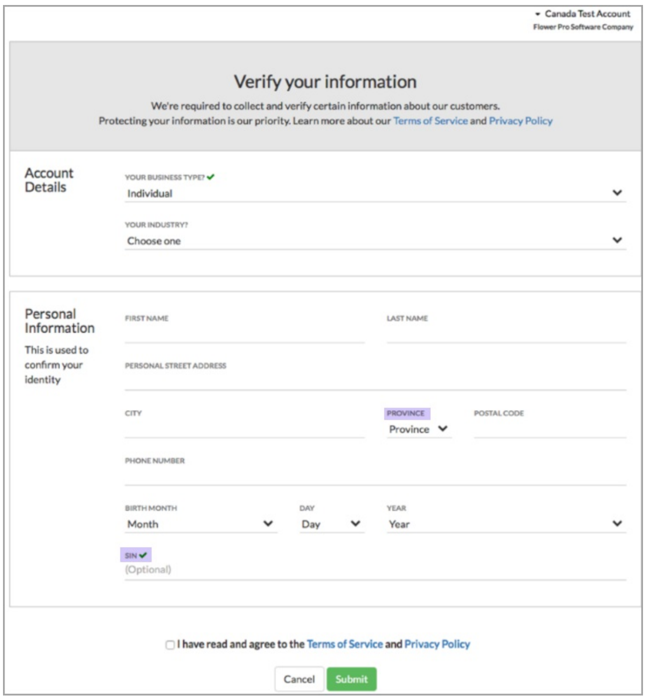


Click the “Update your personal information” link on the homepage.

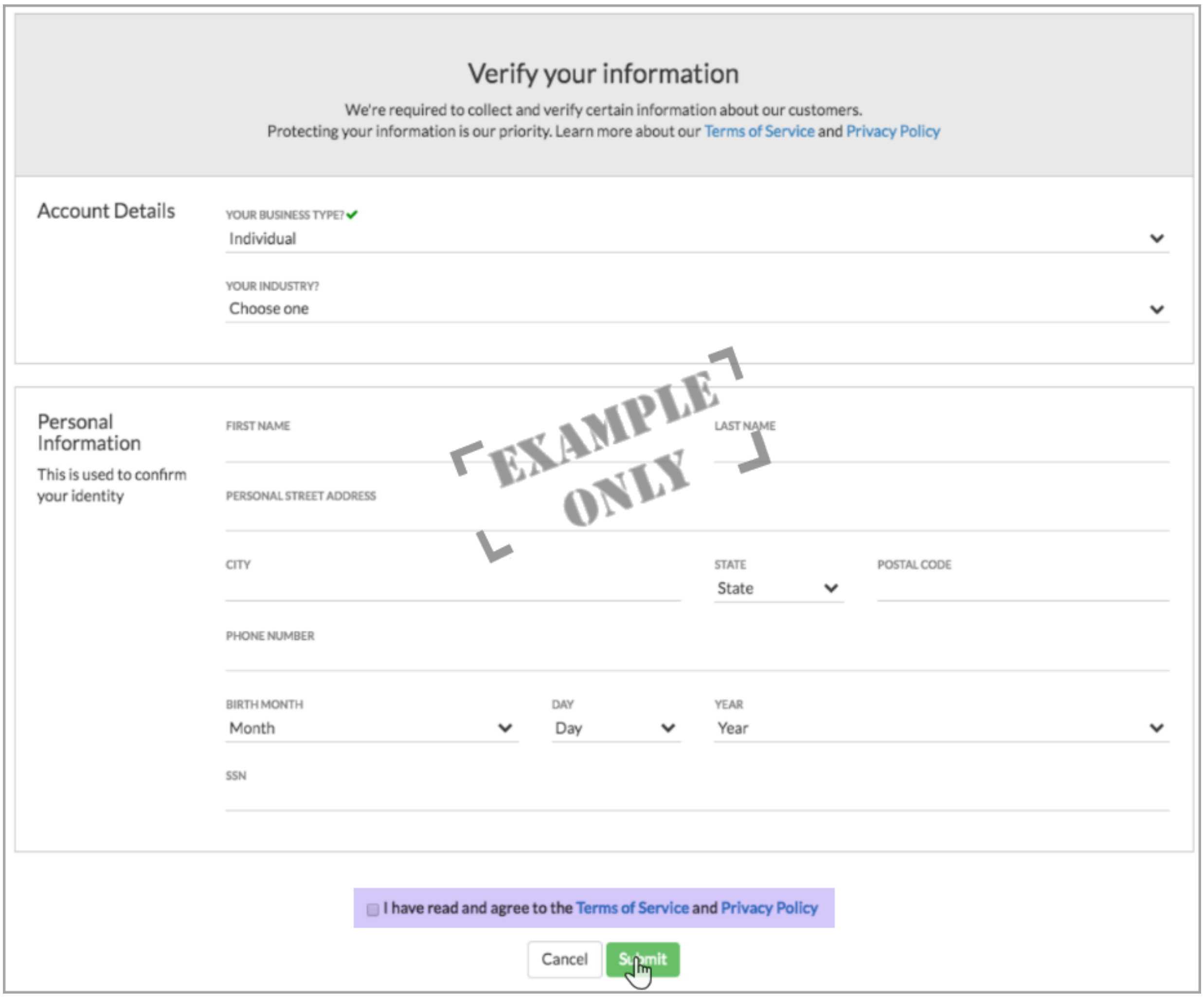
Choose business type and industry under Account Details.

Enter verification details

Please note: For CAD merchants, State is replaced with Province and SSN is replaced with SIN.



- Encourage merchant to read Terms of Service and Privacy Policy and then click to agree.
- Please note: The Terms of Service has important information for merchant types that are unable to process through Infusionsoft Payments.
- Encouraging the merchant to read this now will help eliminate account closures later.
- Click the Submit



Using a different version of Infusionsoft? Click Here to learn more

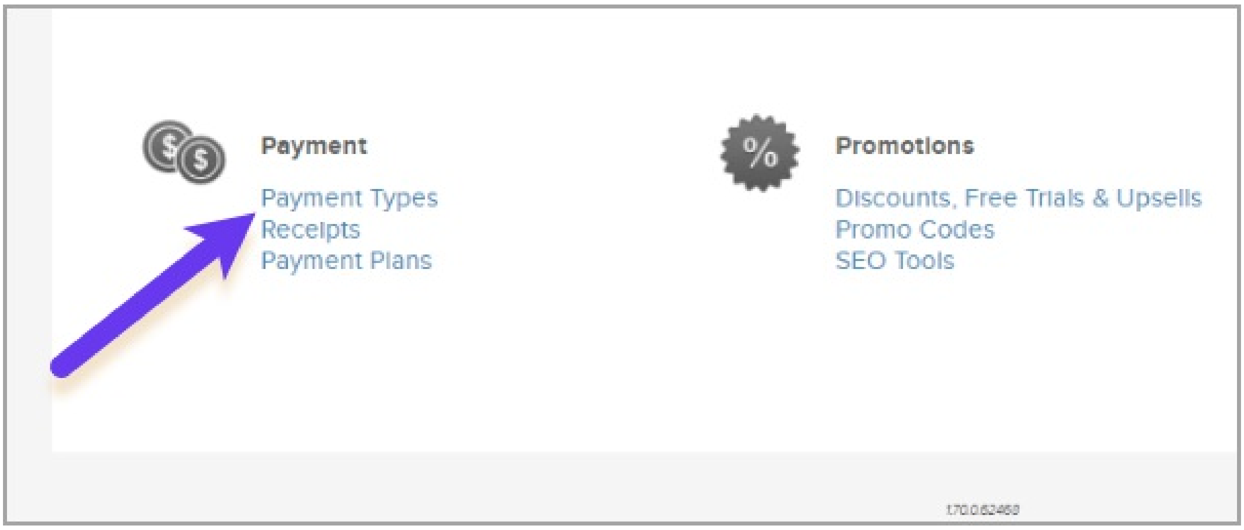
Accept PayPal Payments

Last Modified on 08/31/2018 6:40 pm MST

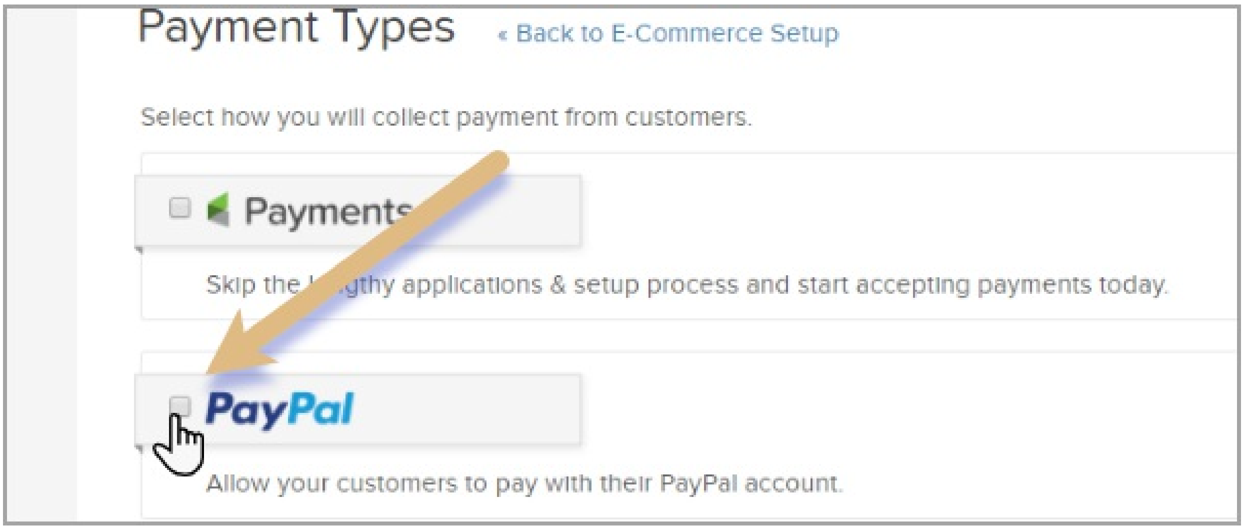
Enable PayPal Express Checkout

1. Navigate to **E-Commerce > E-Commerce Setup**

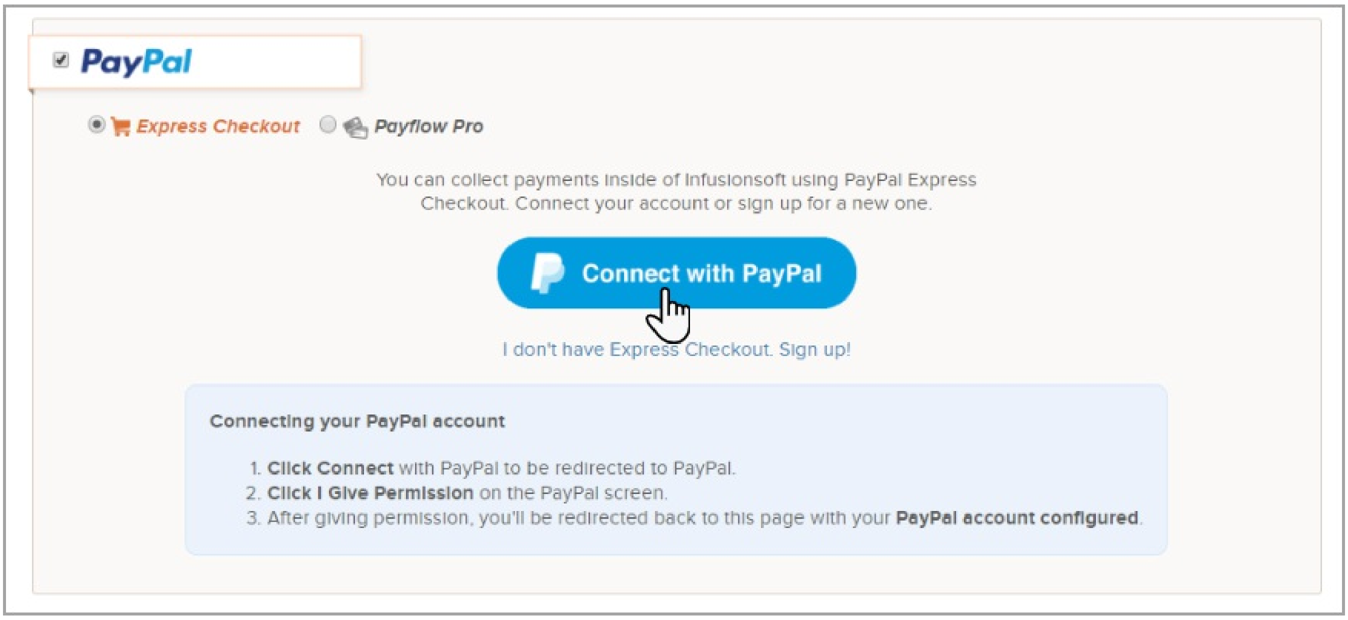
2. Click on **Payment Types** located on the left side



3. Check the **PayPal** option

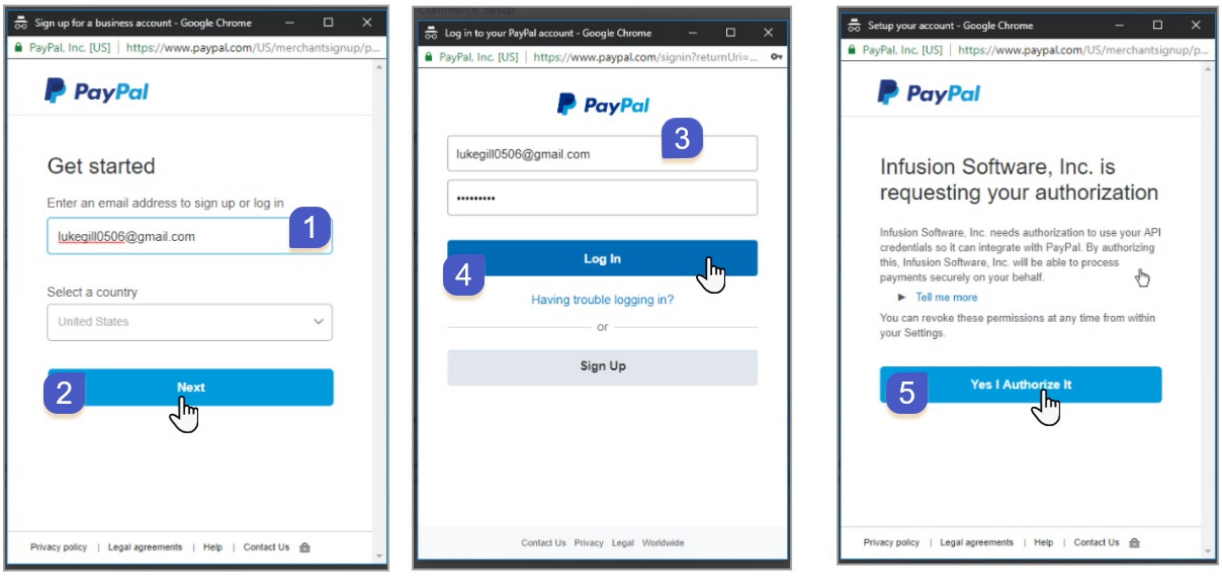


4. Click the **Connect with PayPal** button

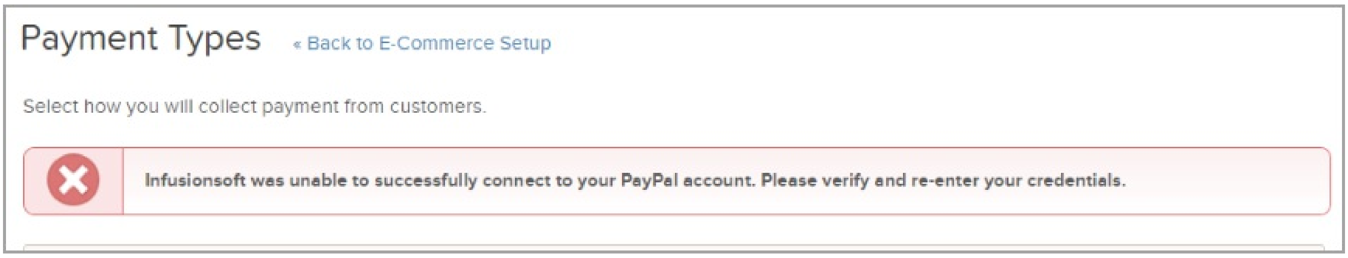


Pro Tip! Make sure you have confirmed your email address with PayPal before connecting. Otherwise, your information wont save.

5. In the pop up window, sign in to PayPal using your business account credentials and authorize the connection between Infusionsoft and PayPal.



6. You may get this message the first time you attempt to Authorize. Simply go through the same steps again and it will connect.



FAQs

What is a PayPal Business Account?

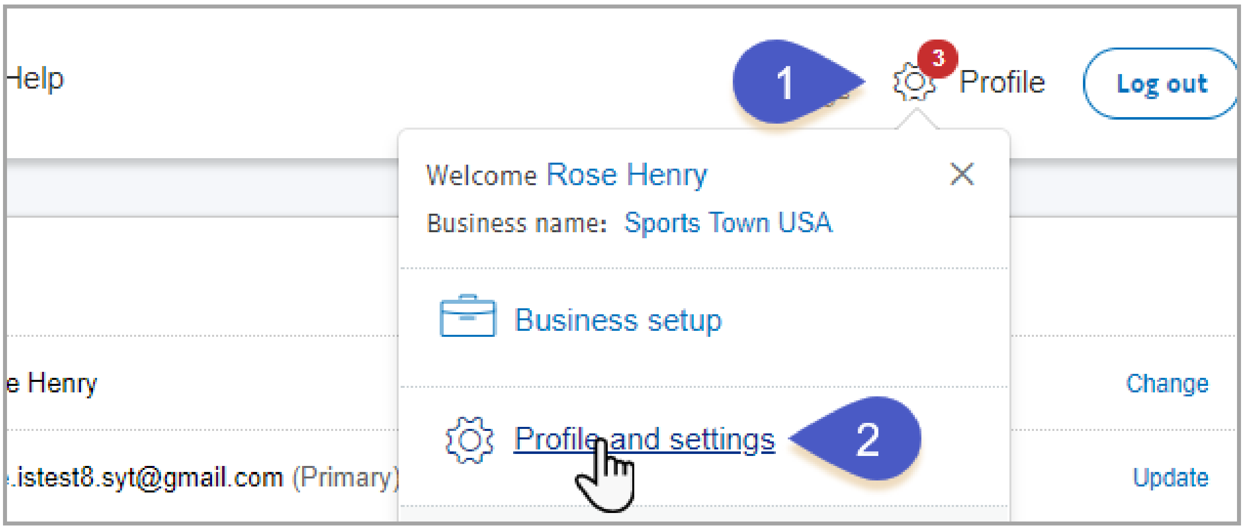
PayPal offers three types of accounts: Personal, Premier, and Business. Click here to learn more information.

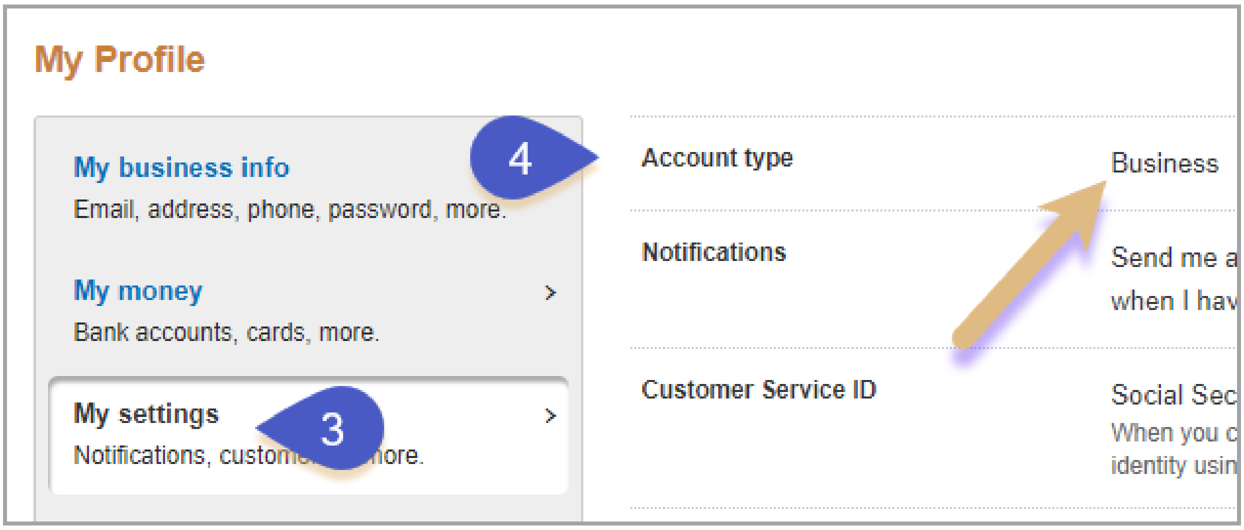
Is a Business Account required in order to offer a PayPal payment option?

Yes. a Business Account and Express Checkout are required in order to process PayPal payments in Infusionsoft.

How do I know what type of PayPal account I have?

Sign in to PayPal, go to **Profile** > **Profile and Settings** > **My Settings** on the left > **Account Type** is shown on the right.



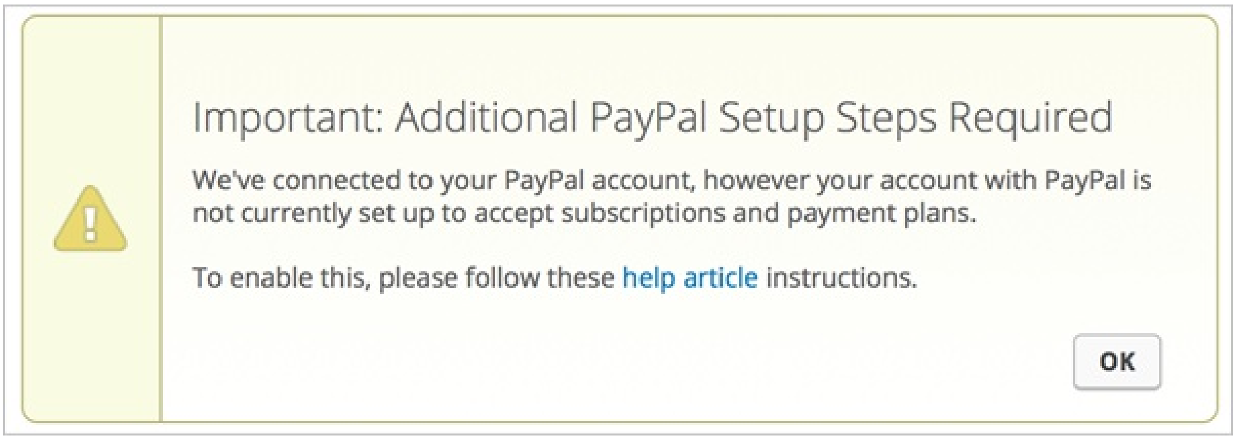


What about international customers?

Overseas customers should still contact 1-844-720-4039 or 1-402-935-2050 (if calling from outside the U.S.) , so the telesales reps can direct you to the appropriate department or click here for more information.

Automatic Billing

If you have received the following alert message while setting up your PayPal account, please follow these instructions:



1. Please contact PayPal via phone at (888) 883-9770 to get **Reference Transactions** enabled on your account.

2. The PayPal Infusionsoft Integration allows you to use **Reference Transactions** for Standard, Advanced, and Pro business accounts.

3. Approval for **Reference Transactions** could take up to 4 days. PayPal will contact you directly to inform you that your request has been approved.

4. After approval, the feature could take up to 24 hours to take effect.
5. After **Reference Transactions** are in effect, the error message in Infusionsoft will go away.

Using a different version of Infusionsoft? Click Here to learn more

PayPal Express Checkout Vs Payflow Pro

Last Modified on 09/04/2018 9:02 pm MST

PayPal Express

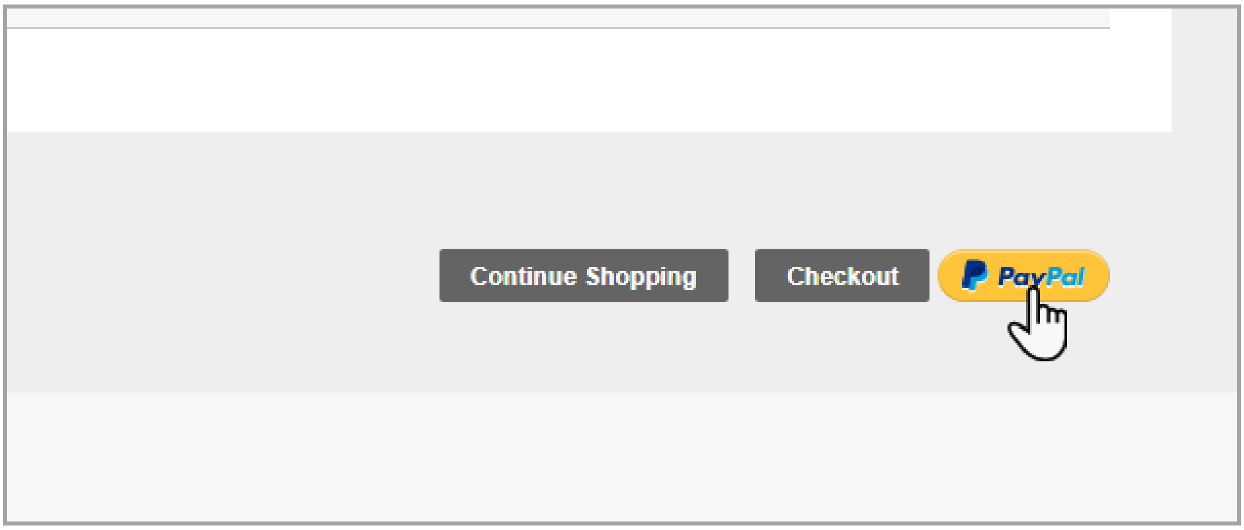
- The first step is to sign up for a PayPal Business account.
- No setup or monthly fees. You only pay when you get paid. Click here for more information.
- The PayPal Express Checkout option is available for the Infusionsoft shopping cart and order forms. It is *not* available for legacy order forms or manual orders.

Pro Tip! You can setup recurring billing with PayPal Express. Click here to find out more information

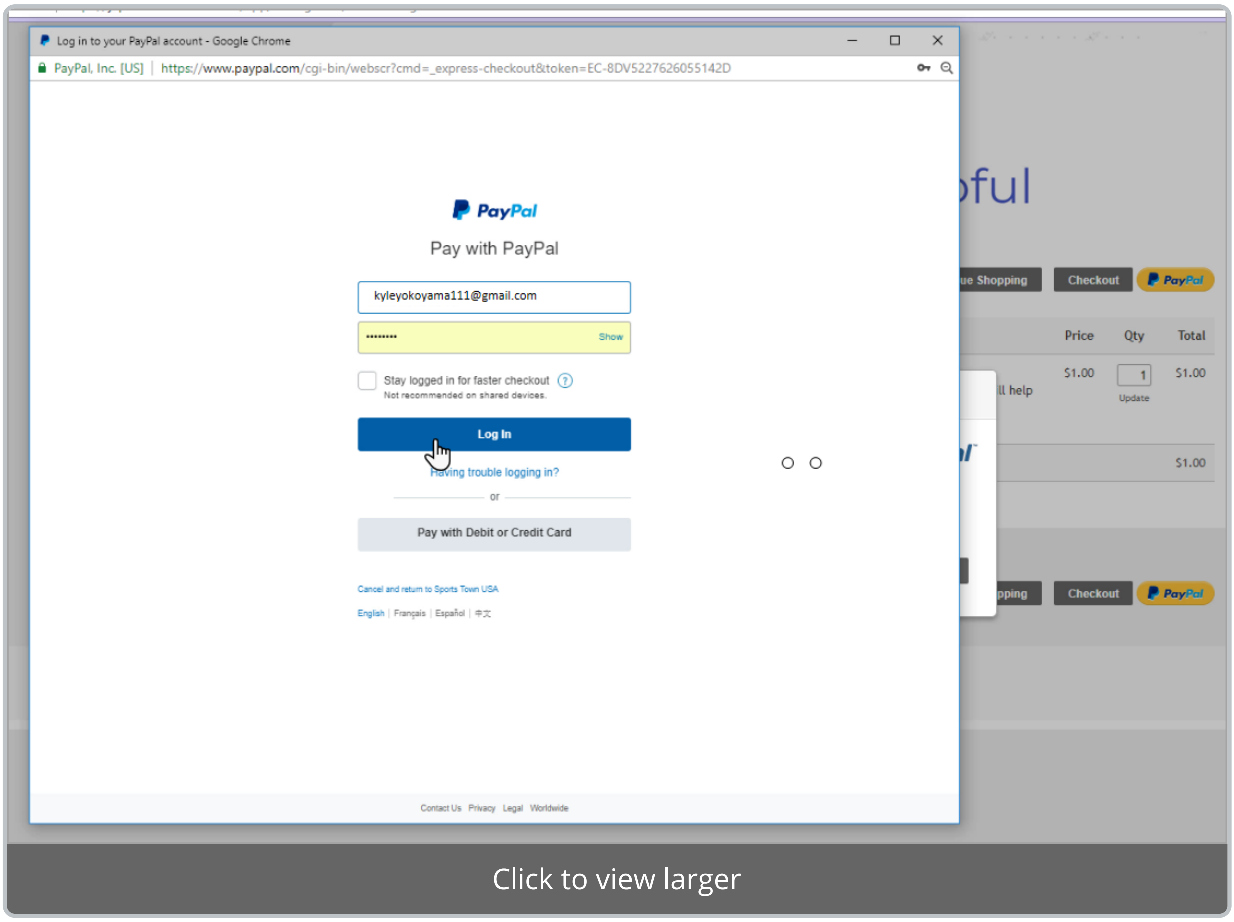
PayPal Express Checkout Process

When your customer checks out with PayPal Express Checkout, they will go through the following steps:

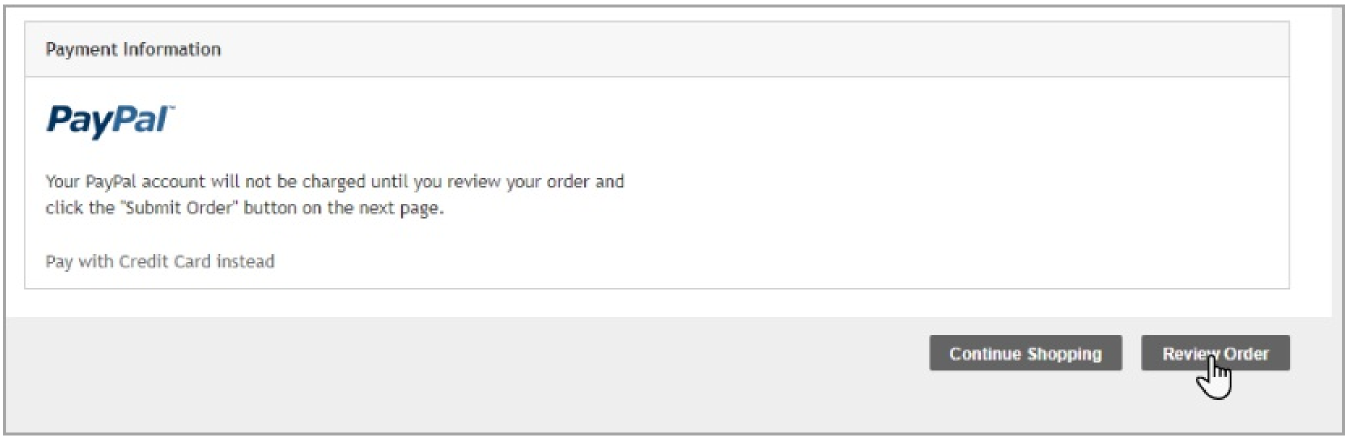
1. They choose the PayPal option through your Infusionsoft shopping cart checkout page.



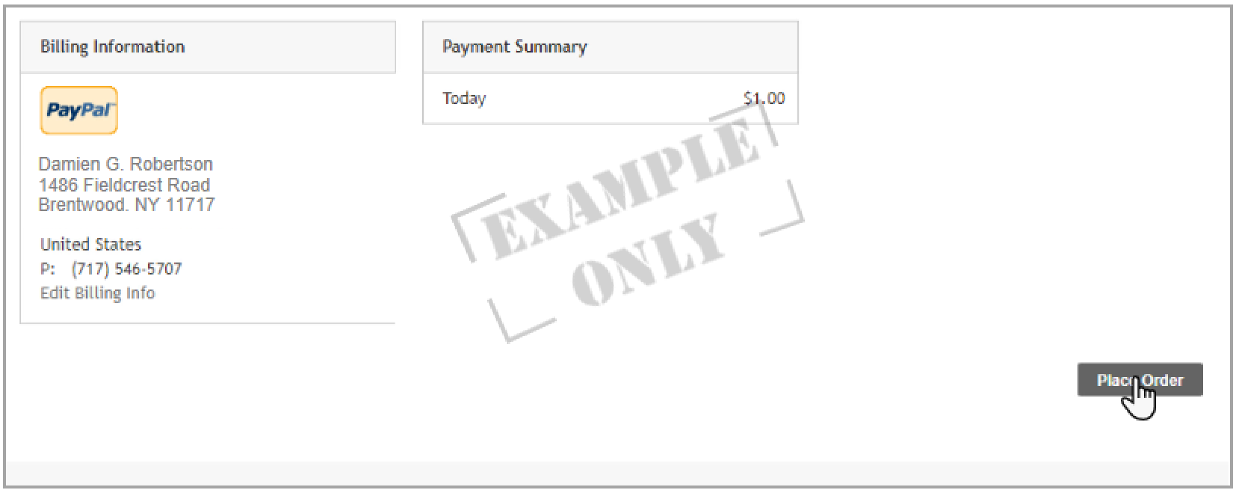
2. Your Customer would than have the option to **sign into PayPal** or to **Pay with a Debit or Credit Card**.



3. The customer then clicks on **Review Order**



4. At this point, the order is created in your Infusionsoft application, but the customer still needs to submit payment. Lastly, click **"Place Order"**.



Payflow Pro Gateway

A payment gateway is a service that sends credit card information from a website to the credit card payment networks for processing, and returns transaction details and responses from the payment networks back to the website.

Unlimited checkout customization.
Payflow Pro is fully customizable, so you can build a checkout experience as unique as your business. Everything is on the table, from language and layout to page sequence and PCI compliance options. You can add a PayPal button to help drive more sales, or use our hosted pages and offer PayPal Credit, too.

When you integrate with the Payflow Pro Gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders).

Optional features - Recurring billing
Recurring payments such as monthly membership fees or annual contract renewals? Get the extra convenience of processing these types of payments automatically. Recurring Billing is a PayPal add-on service, see pricing here .

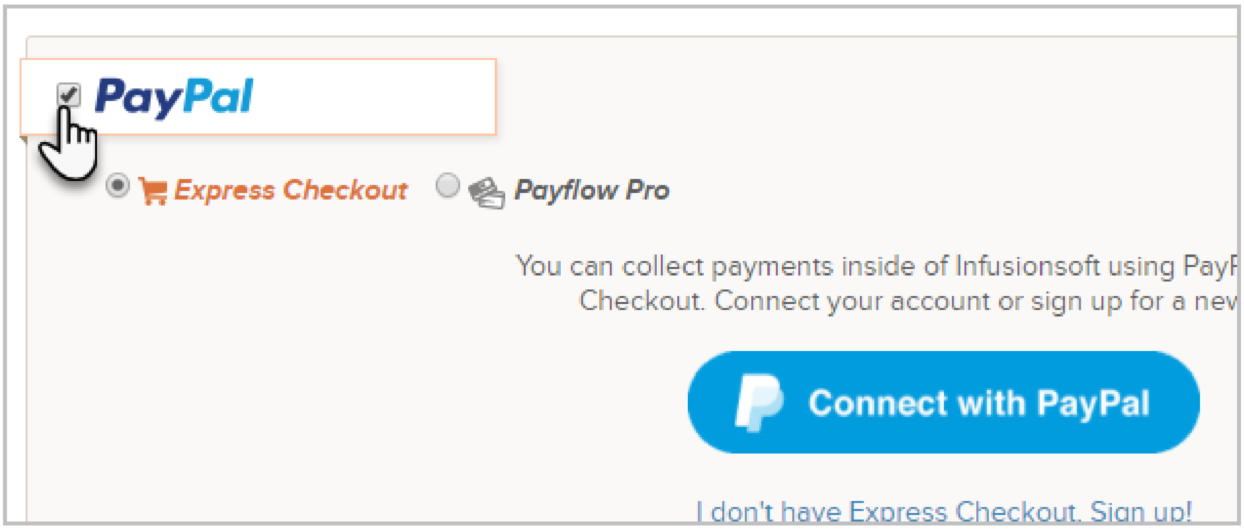
Using a different version of Infusionsoft? Click Here to learn more

Enable PayPal Express Checkout

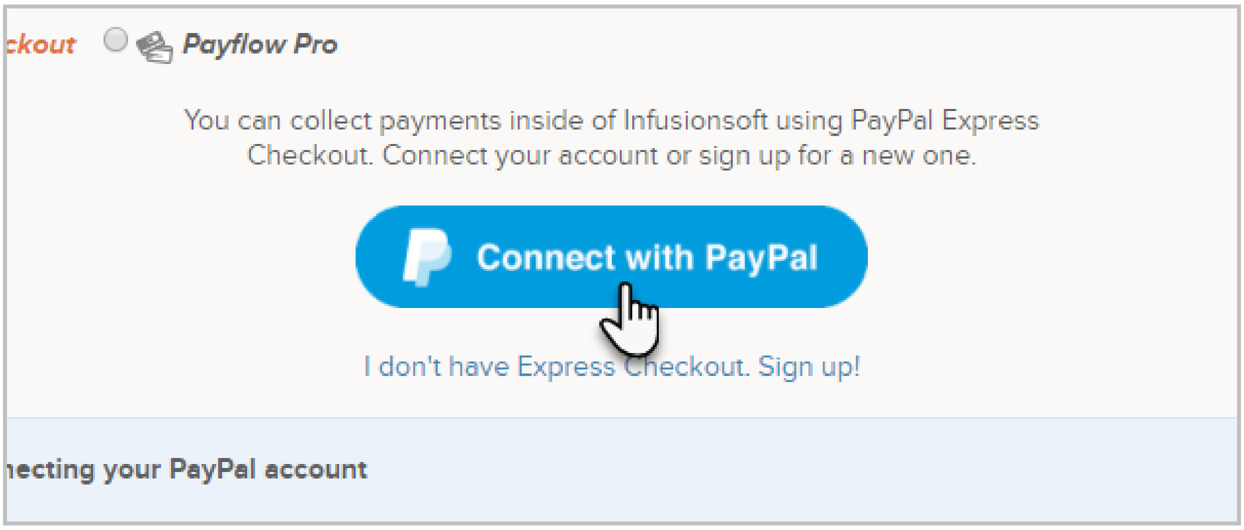
Last Modified on 08/01/2018 3:22 pm MST

1. Navigate to **E-Commerce Setup** from the Infusionsoft main menu
2. Click on **Payment Types** from the **Payment** sub menu in the bottom left corner of the page

3. Click the checkbox to the left of **PayPal** to reveal details for configuring PayPal

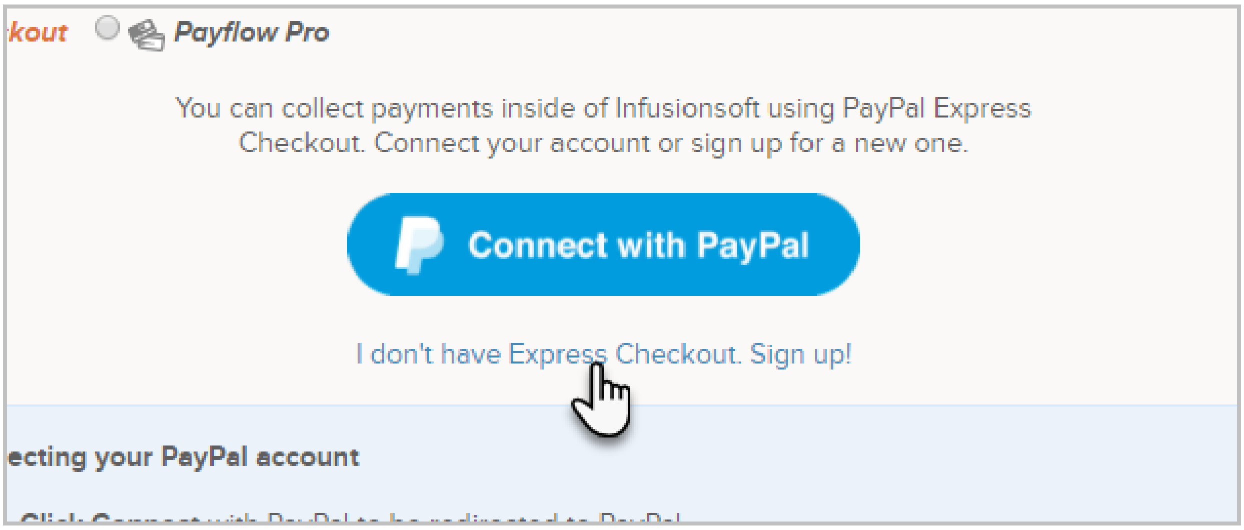


4. If you are an existing PayPal Express Checkout user:
    1. Click the blue **Connect with PayPal** button in the middle of the screen:



2. Authenticate your account by entering your email address, clicking the country associated with your account and click the blue **Next** button.

5. If you are a new user to PayPal Express Checkout...
   1. Click the **I don't have Express Checkout. Sign Up!** URL below the blue **Connect with PayPal** button.



   2. Enter an email address and select the country you are located.

6. Click the blue **Next** button to continue

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PayPal Payflow Pro Merchant Account

Last Modified on 08/10/2018 10:55 am MST

When you integrate with the PayPal Payflow Pro merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscription or payment plans. When a customer submits payment through the Payflow Pro gateway, they never leave your company website. PayPal is only running on the back end to process the payment. The customer never goes to the PayPal website and they only receive an order receipt from you, not one from PayPal.

Note: The Payflow Gateway only supports customer input and API parameter values that are in regular ASCII (English language) characters. Payflow does not support extended ASCII characters or any other character sets other than regular ASCII at this time.

Example of an extended ascii character like á,é,í,ó,ú,ý

Additionally, the Payflow hosted checkout pages and PayPal manager account settings pages are available in English only. For information on a similar PayPal product that offers multi-lingual support, see Website Payments Pro Hosted Solution .

1. Go to **E-Commerce > E-Commerce Setup**
2. Click on **Payment Types**
3. Make sure PayPal is checked and Select the **Payflow Pro** option.
4. Fill in the Payflow Pro Merchant Information.

   Some of this information must be obtained from PayPal. (Visit the PayPal Help Center)
   - **User**: This is your Payflow account login name (This field is usually the same as the Vendor field.)
   - **Vendor**: This is the Payflow account login name (This field is the login ID you created when you signed up for the Payflow service. It is the same merchant ID

used to access PayPal Manager.)

- **Partner**: This contains VeriSign, PayPal or the name (ID) of the reseller company from which you purchased the Payflow Pro service.
- **Password**: Contains your Payflow password, however, this may or may not be the same password you use to access PayPal Manager.
- **Currency**: Select a currency from the dropdown. *Note: This does not change the currency symbol displayed in the shopping cart. It only tells PayPal what currency to process the payment in. You can change the currency symbol through **E-Commerce > Settings > Orders**.*
- Be sure to check the box if you plan on offering recurring billing.

5. Scroll down the to bottom right of the screen and click the **Save** button.

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PayPal Express Recurring Billing Setup

Last Modified on 09/04/2018 6:07 pm MST

Recurring Billing which PayPal refers to as a **Reference Transaction** takes existing billing information already gathered from a previously authorized transaction and reuses it to charge the buyer in a subsequent transaction, both **PayPal Express Checkout** & **PayFlow Pro** can enable **Reference Transactions.**

Reference Transactions is not a standard product and approval is subject to a fully underwritten application. This can include reviewing your business model and finances to determine your suitability.

This FAQ answers common questions about getting your PayPal account approved for **Reference Transactions**

How do I get Reference Transactions Enabled with PayPal?

To request that PayPal turn on **Reference Transactions,** call your local PayPal Support Help Center. Find the phone number at Contact .

Tell PayPal that you are specifically calling so a **PayPal Specialist can enable Reference Transactions** on your account. They may try to help you set up recurring payments with a button — that is *not* want you want. They need to transfer you to a specialist who will ask you for your PayPal account information (email address), and then tell you that they filed a ticket, and you will hear back from PayPal via email on whether Reference Transactions have been enabled or not.

Email Application

You can also contact PayPal via email.

1. Log into your PayPal account.
2. Go to the Email Contact Form .
3. Choose topic: **Business solutions.**

4. Choose sub-topic: **PayPal Payment solutions.**
5. Choose second sub-topic: PayPal Express Checkout
6. Copy and paste the message below, inserting your PayPal email address and name.
7. Wait for a reply.

Example Message to send to PayPal

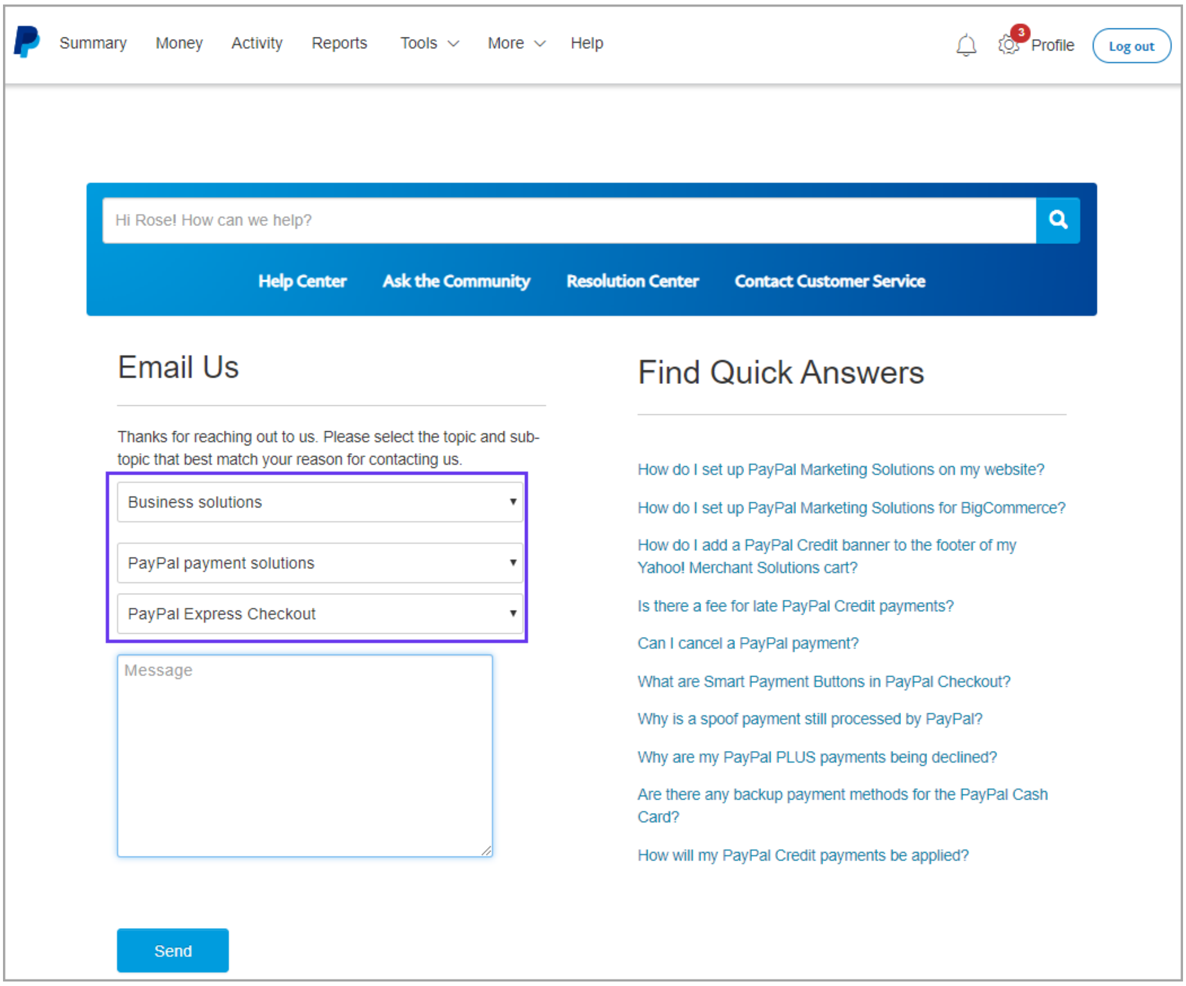
```
Hello,

Could you please enable Reference Transactions on my PayPal account (email: paypal@exa
mple.com)?

I need this feature to sell recurring subscription products via Infusionsoft.

Kind regards,

Your Name
```



Respond to the Autoresponder

In an effort to reduce support, PayPal may send you a response from an auto-response message with some links to documentation.

Hidden in this auto-response is the following:

If we haven't answered your question, please reply to this email and our team will answer you as soon as possible.

You also need to respond to the auto-response before your support ticket is submitted to PayPal.

Will My Account Qualify for Reference Transactions?

PayPal does have a set a requirements that need to be met before they enable support for Reference Transactions on your account.

Unfortunately, PayPal does not publish these requirements and based on anecdotes from customers, the requirements can be different for different businesses.

Some things that store owners have mentioned PayPal require are:

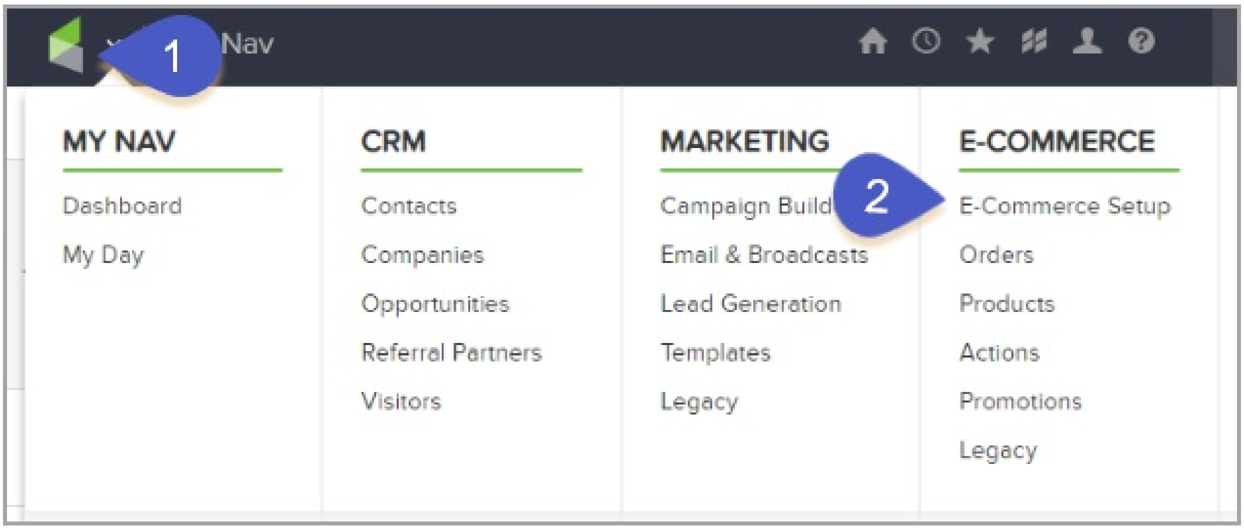
- High personal credit (FICO) score for US based PayPal Business accounts
- Business plan
- Average transaction price
- Number of repeat customers
- Number of Reference Transactions per customer
- Revenue forecast and/or projected total revenue volume from Reference Transactions
- Demonstrate a clear business rationale behind the request
- Show the signup flow for customers in regards to Reference Transactions.
- Proof that you will show clear terms and conditions for customers in regards to Reference Transactions and how to cancel once they sign up.
- Written statement as to why you need Reference Transactions and how you will use it for your business.

In terms of revenue forecasts, we have had reports that UK based PayPal accounts may require minimum forecast of £6,000 month or more revenue.

PayPal had enabled Reference Transactions, is there anything I need to do through Infusionsoft?

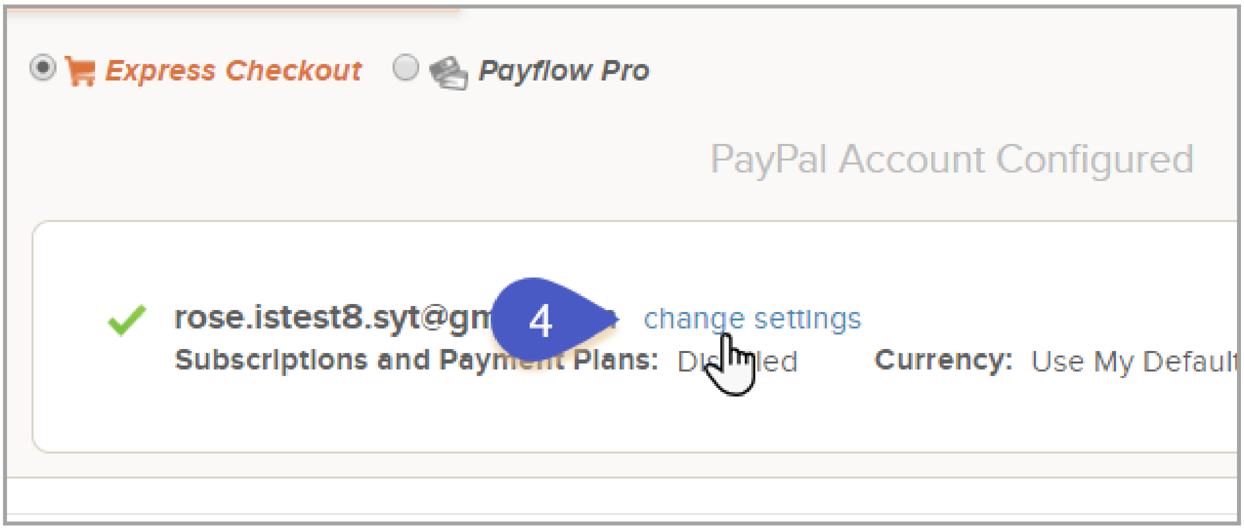
Yes, you need to check the box that you will be using Subscriptions through PayPal. To do this go to

1. E-Comerce Setup > Payment Types

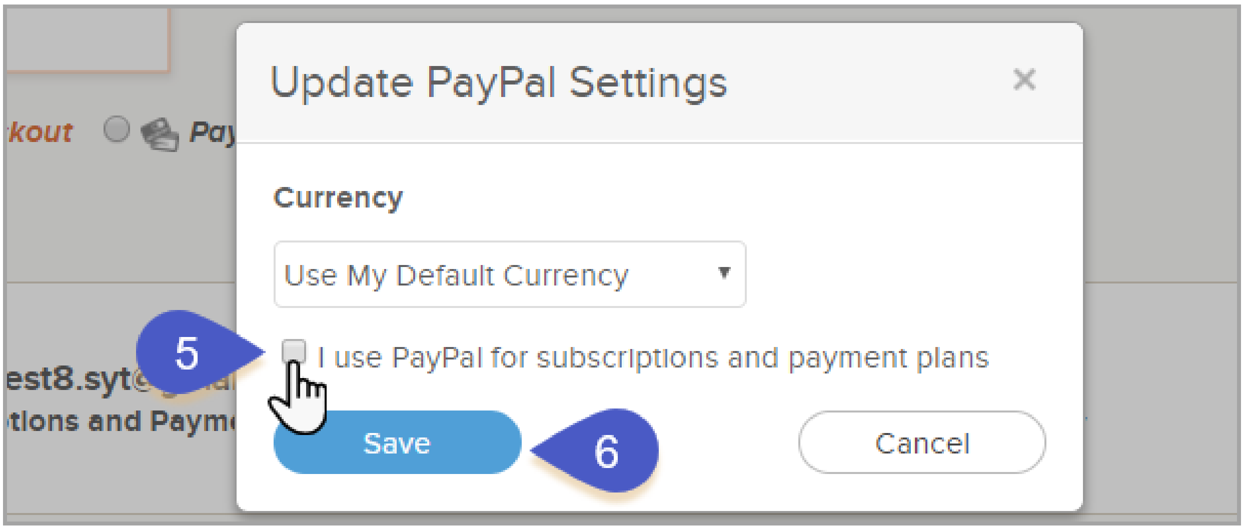


For **Express Checkout**

2. Click "**Change Settings**"

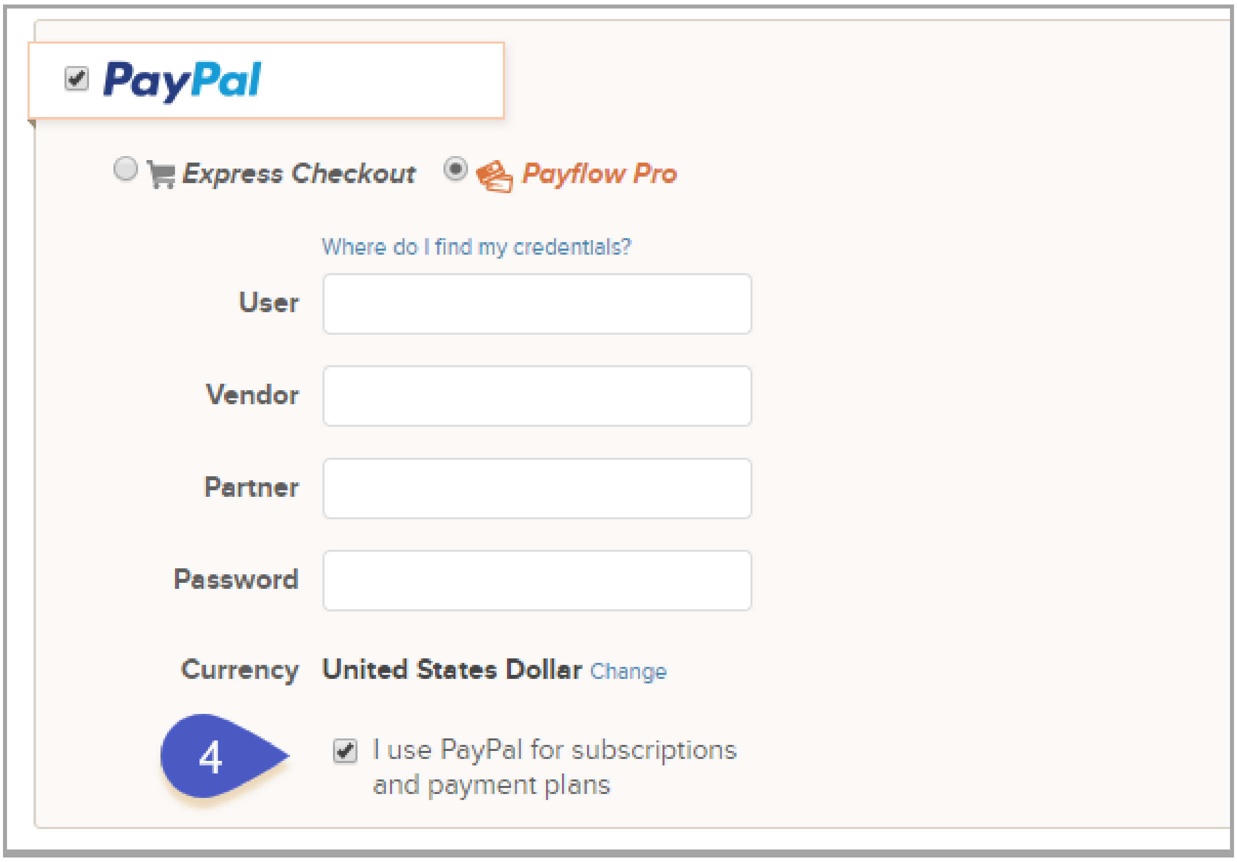


3. Check the box next to "**I use PayPal for subscriptions and payment plans**"
4. Click **Save**

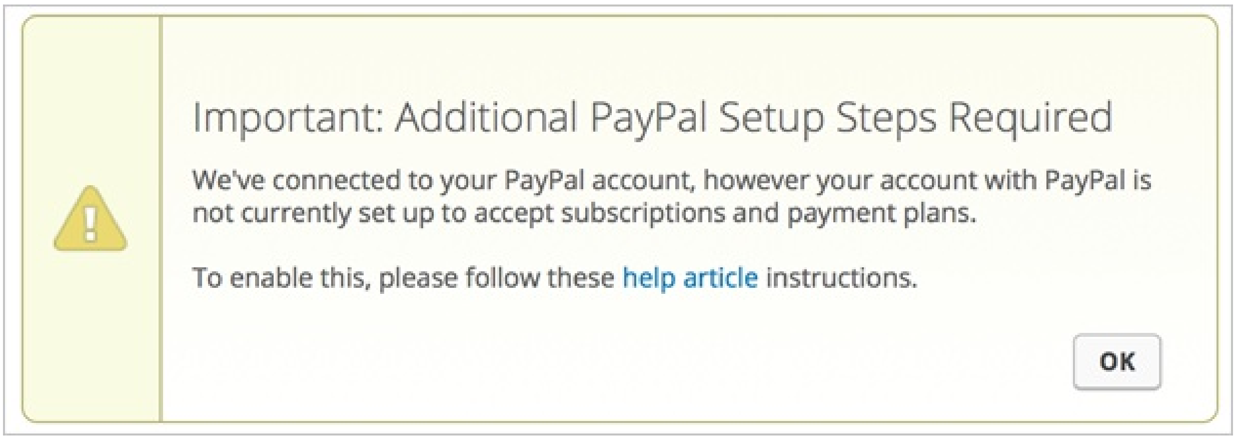


For **PayFlow Pro**

Check box next to **"I use PayPal for subscriptions and payment plans"** > Scroll down and click **"Save"**



If **Reference Transactions** has not been enabled by PayPal you will receive this message



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Create A Product In Infusionsoft

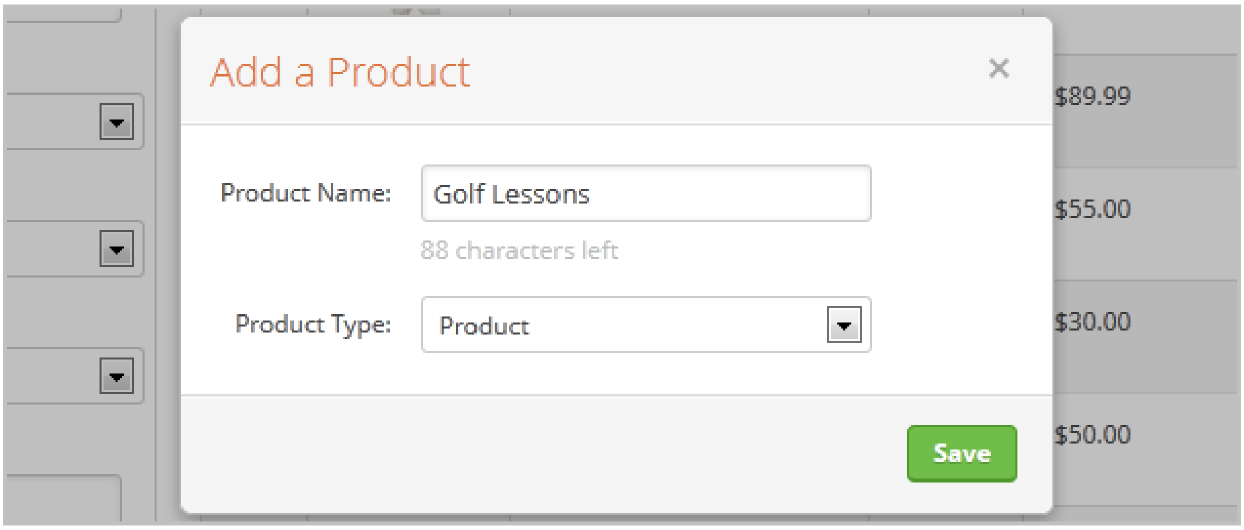
Last Modified on 08/14/2018 1:33 pm MST

If you only have a few products or you're ready to add some new products to Infusionsoft, you can enter each one manually instead of using the import tool to upload a list. These instructions apply to adding any product that is not a digital product.

1. Go to **E-Commerce** > **Products** in the main navigation menu

2. Click on the **Add Product** button at the top right of the screen.

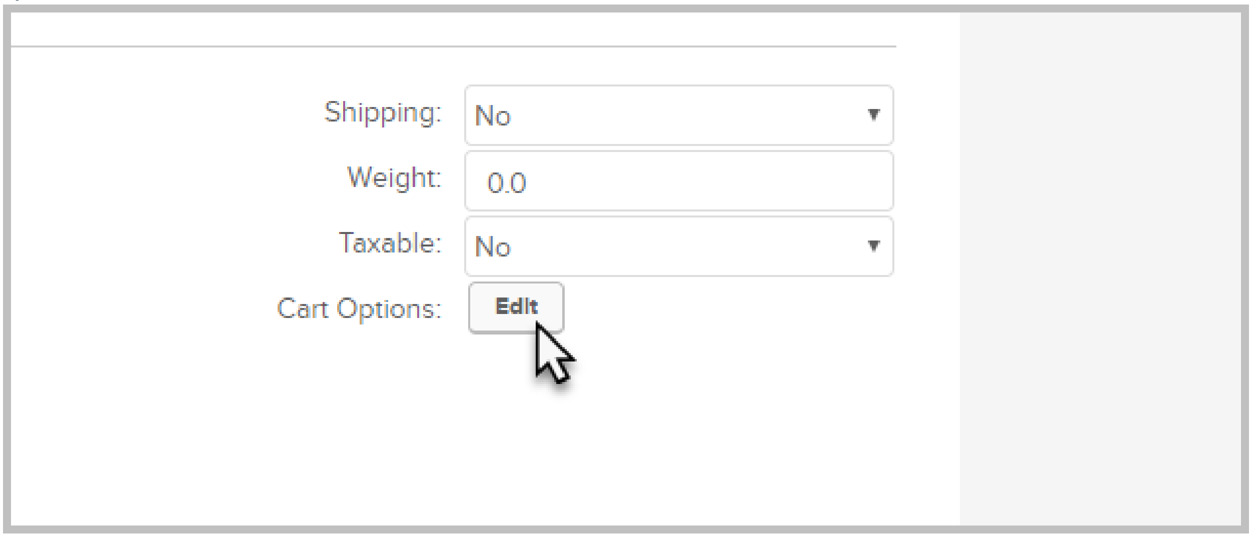
3. Enter a Product Name and click **Save**
   This name is displayed to your customers and on the product list inside of Infusionsoft. Product names are limited to 100 characters.



4. Enter the product information.
    - **Product Name**: This name is displayed inside of Infusionsoft and on the storefront, shopping cart, order forms, and invoices / receipts. You entered the name when you added the product, but can edit it if needed.
    - **Product Type**: You already selected the Product Type when you enter the product. This field is used to hide or reveal the Digital Files tab in the product record.
    - **Short Description**: This description shows up on the storefront, shopping cart, order forms, and invoices / receipts. 250 Characters Max.
    - **Status**: Active products are available for purchase. Set a product to Inactive when it is no longer available for sale (i.e. seasonal product, limited edition product, etc.)
    - **Price**: This is the selling price for the product.
    - **Cost**: Enter your cost for this product. This number is used to keep your profit margin visible as you modify product price and / or receive a refund or credit request after a customer purchases.
    - **Sku**: This is optional. It stands for Stock Keeping Unit and may correlate with an external inventory management system.
    - **Categories**: Mark Category and Subcategory checkbox(es) to determine where this product displays in the Infusionsoft storefront, and to make it easier find when viewing your Infusionsoft product list. Click on the Add button to create new categories and subcategories if the one you need isn't listed.
    - **Shipping**: Set to *Yes* to include this product in the shipping calculations for online or manual orders.
    - (Optional) **Weight**: Enter the weight to be used for weight-based shipping calculations. Note: The default unit is Pound. Go to **E-Commerce** > **Settings** > **Orders** > and scroll down to the **Fulfillment**section to change this to Ounce, Kilogram, or Gram.
    - **Taxable**: Set to *Yes* and designate the sales tax(es) that apply to this product: Country, State, and/or City. Note: The default sales tax applies in the shopping cart and on order forms, but users can override the defaults when creating a manual

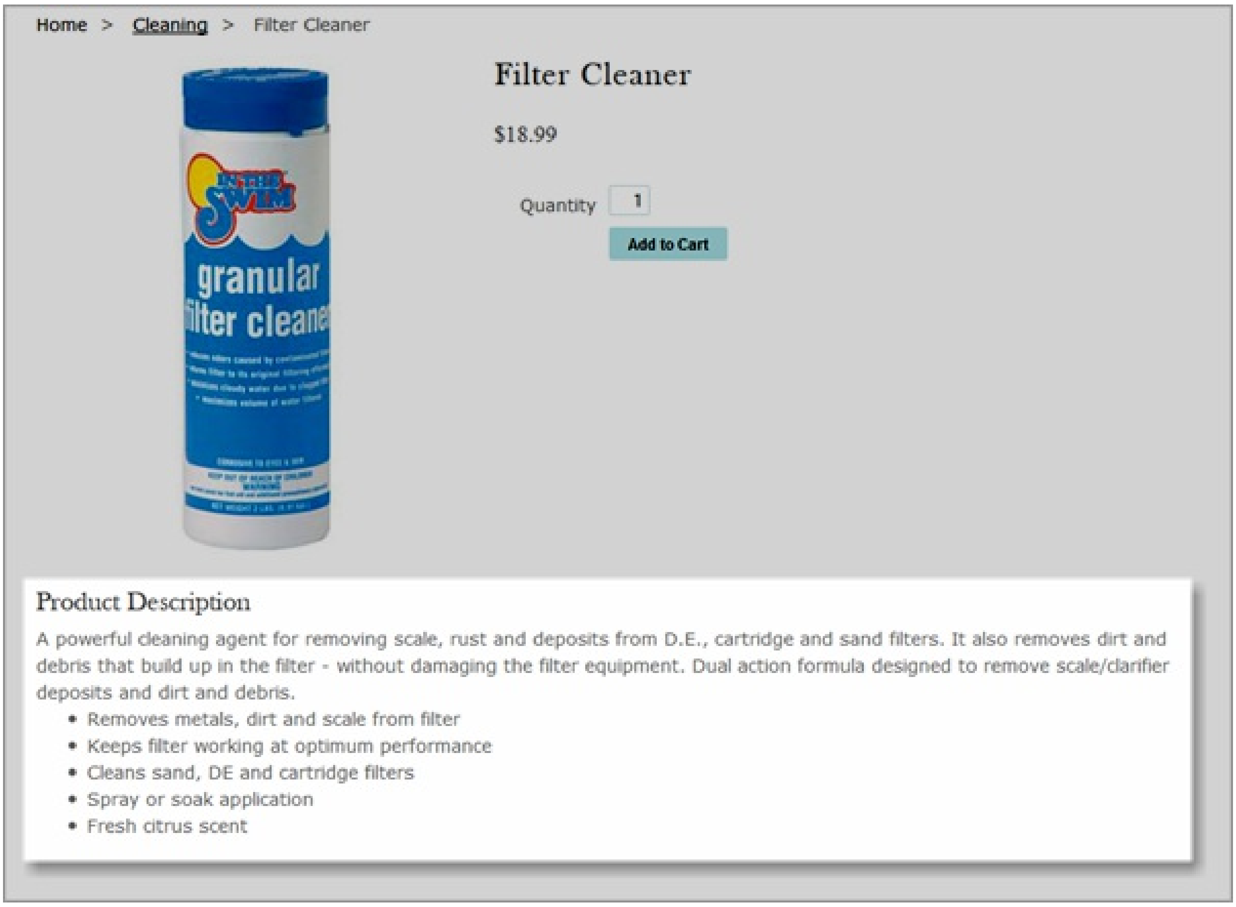
order.

5. (Optional) Click on the **Edit** button to add cart options, and then click **Save** to apply the update(s).



   - **Is hidden in cart**: Mark this checkbox if you are using the Infusionsoft storefront to sell most products, but want to sell this product some other way (i.e. manual order, order form, a different website). The product is still active, but it won't display in the storefront.
   - **Top HTML / Bottom HTML** *(FOR LEGACY SHOPPING CART THEMES ONLY) :* These fields show up on the shopping cart summary page only when a customer chooses to purchase this particular product. It is a great way to add product-specific details or reminders on the checkout page. Click on Edit to use the Infusionsoft WYSIWYG editor or click on Source to paste in HTML code created outside of Infusionsoft.

6. (Optional) **Long Description**: This is a long description that is only displayed in the Infusionsoft storefront.


Home > Cleaning > Filter Cleaner
Filter Cleaner
$18.99
Quantity 1
Add to Cart
granular filter cleaner
Product Description
A powerful cleaning agent for removing scale, rust and deposits from D.E., cartridge and sand filters. It also removes dirt and debris that build up in the filter - without damaging the filter equipment. Dual action formula designed to remove scale/clarifier deposits and dirt and debris.
Removes metals, dirt and scale from filter
Keeps filter working at optimum performance
Cleans sand, DE and cartridge filters
Spray or soak application
Fresh citrus scent

7. Click **Save**

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Import Products

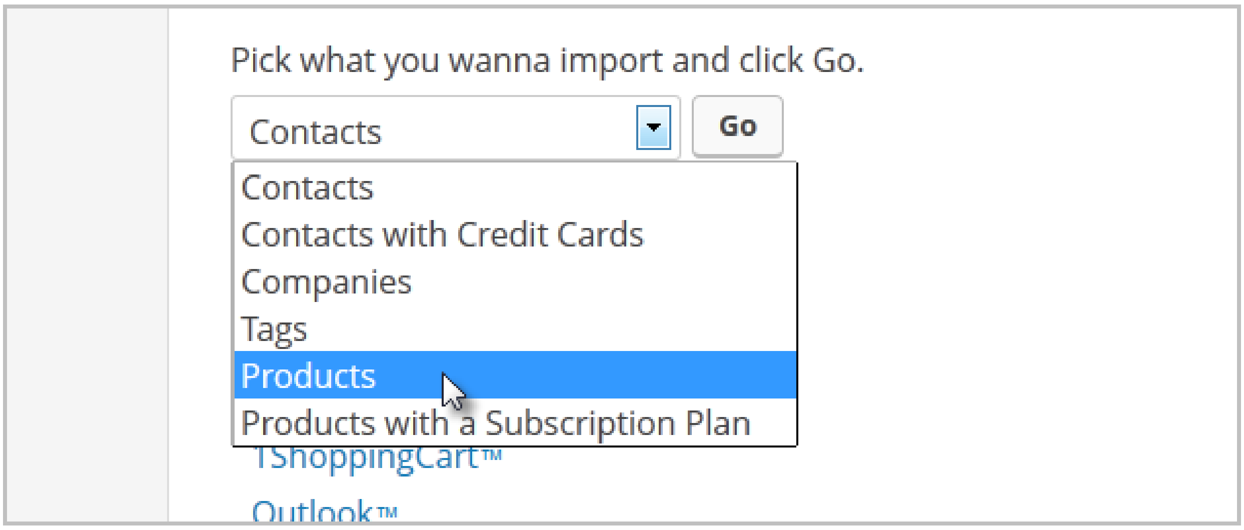
Last Modified on 08/01/2018 3:24 pm MST

Before you can sell products through Infusionsoft, you need to add the products you offer to Infusionsoft. If you have a lot of products, it is faster to add them using the product import tool. If you are transitioning to Infusionsoft from another system, you should be able to export your current product lists from that system and save them in .csv file format.

Products vs. Subscriptions: If you sell both products and products with subscription plans, you will need to divide them into two separate lists and import them separately. The subscription import includes additional fields for recurring billing. The Infusionsoft import tool will create product records and import product details. After the import, you will still need to edit the product records to add images, digital files, product options, assign them to categories, etc.

1. Go to **Admin** > **Import Data** n the main navigation menu.

2. Select **Products** as the import type and click on the **Go** button.



3. Click on **Browse** and select the product file (in *.csv* format) from your computer.

4. Click **Next**.

5. Match the Product Fields in your spreadsheet to the following available Infusionsoft fields:

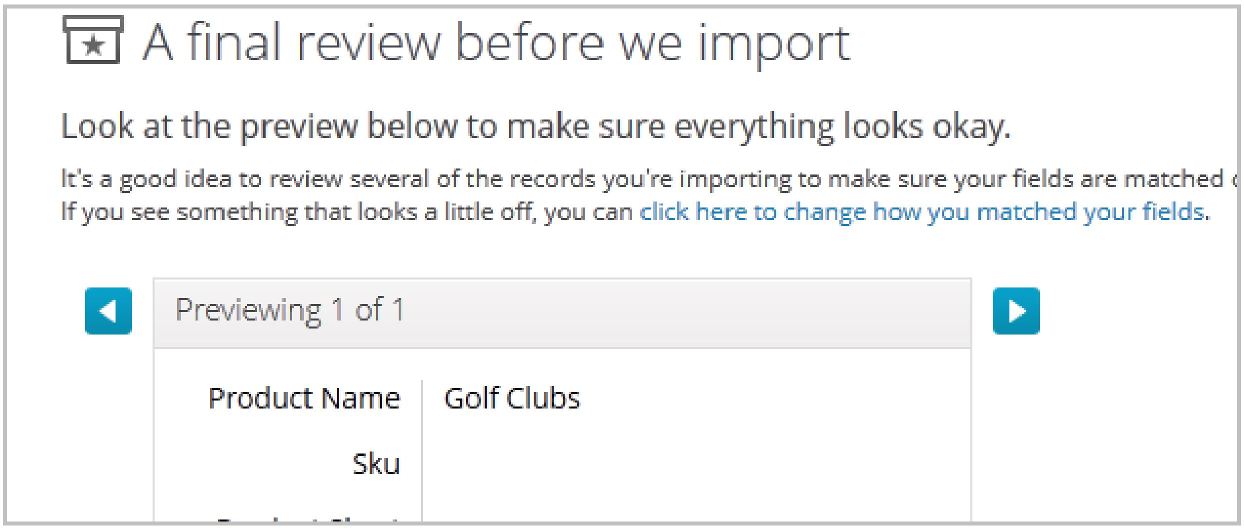
   - **Product Name**
   - **Product Price**
   - **Taxable** (Yes or No)
   - **Charge Shipping** (Yes or No)
   - **Status** (Active or Inactive)
   - **Product Short Description**: This shows up on the Shopping Cart, Order Forms, and on invoices / receipts.
   - (Optional) **Product Description**: This is a long description that shows up when the product is displayed in the Infusionsoft Storefront.
   - (Optional) **Sku**: This is optional. It stands for Stock Keeping Unit and may correlate with an external inventory management system.
   - (Optional) **Weight**: This is used to calculate weight-based shipping.
   - (Optional) **Cost per Unit**: This is used to track profit margins.
   - (Optional) **Hide in Store** (Yes or No): This is used to hide products from the Infusionsoft Storefront.
   - (Optional) **Subscription Only** (Yes or No): This must match up with a column on your import spreadsheet that denotes whether a product is sold by subscription plan only, or not.

6. Click **Next**

7. (Optional) **Match Field Values:** this step will only show up if you are importing fields that have more than one possible value.

8. Click **Next**.

9. Click on the **Previous** and **Next** arrows to preview the import before the final step.



10. Click **Done**.

11. To view your products, go to **E-Commerce** > **Products**

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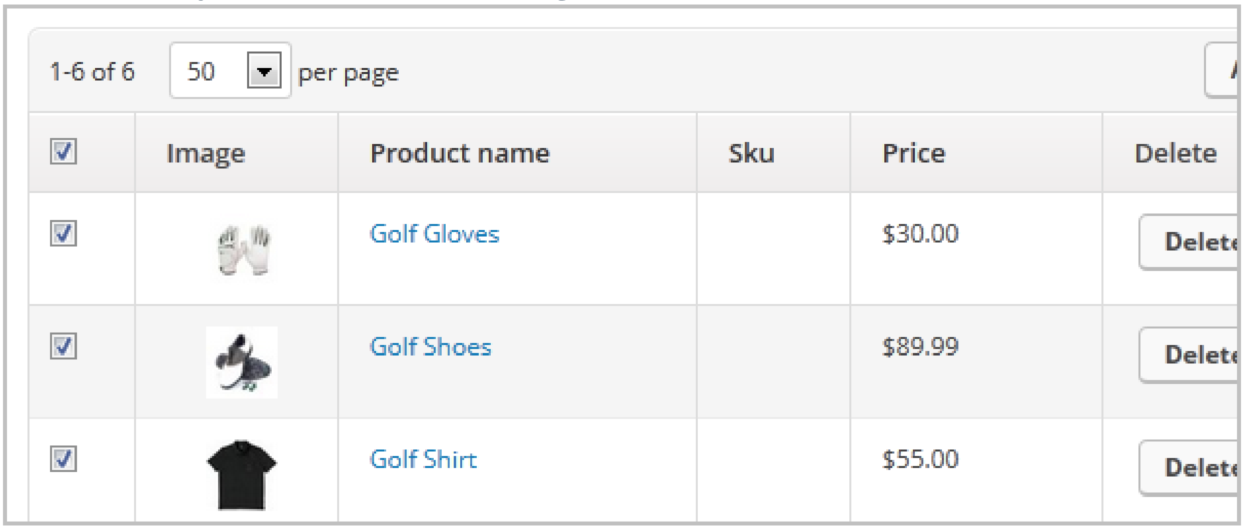
Access And Manage Your Product List

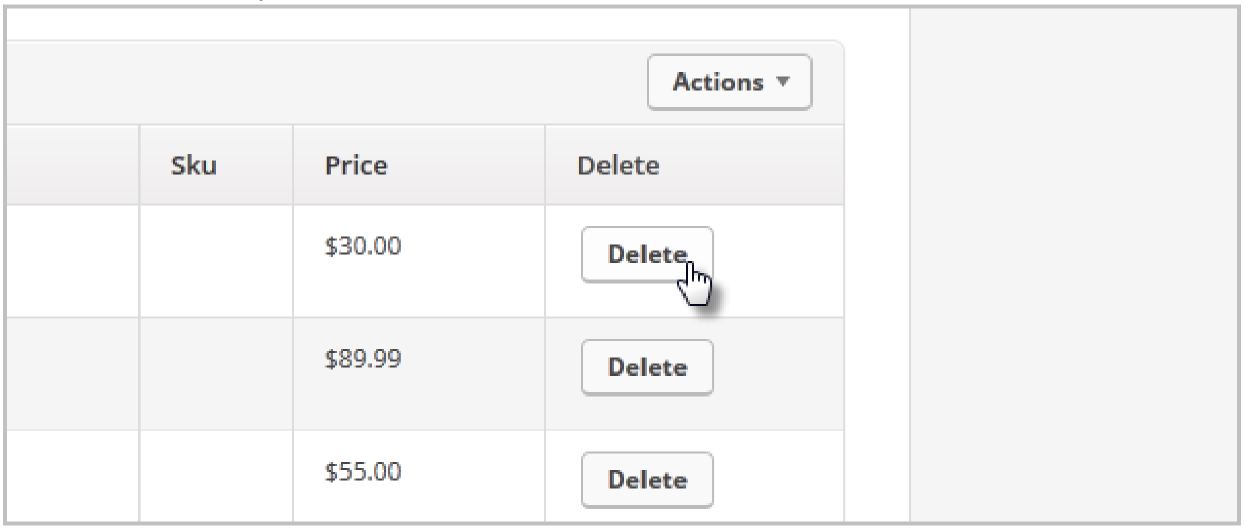
Last Modified on 08/01/2018 3:24 pm MST

1. Go to **E-Commerce** > **Products** in the main navigation menu.

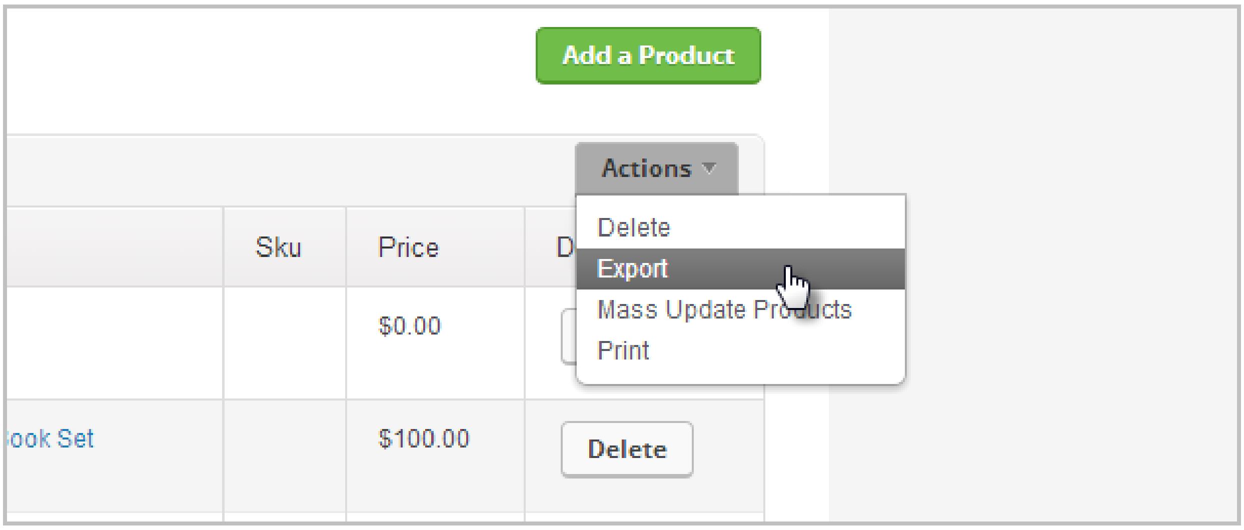
2. From this list you can do the following:



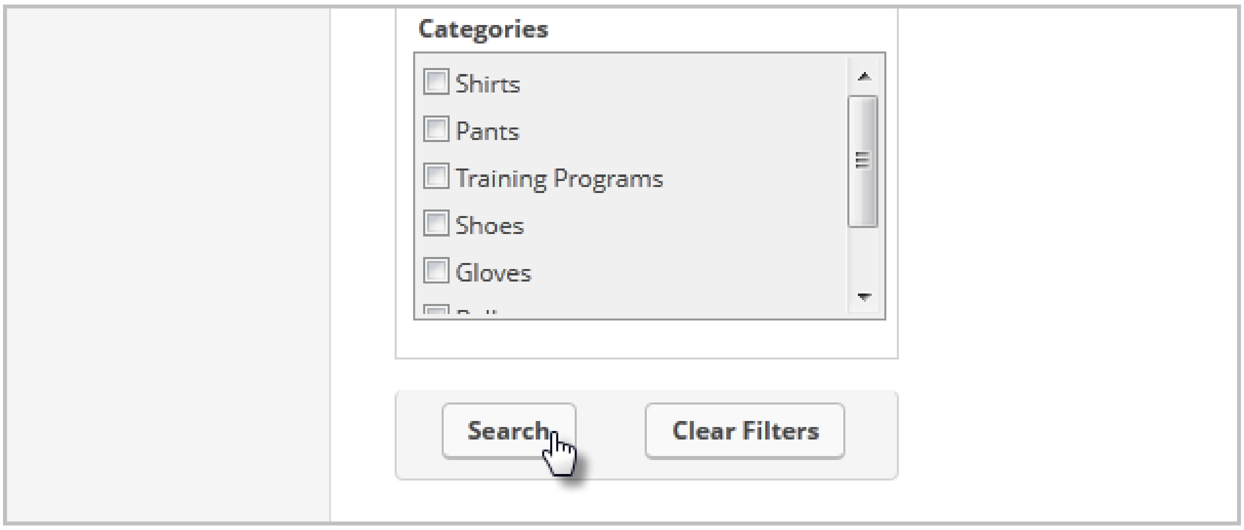
   - Delete individual products.



   - Run actions on the product list: Delete, Export, Mass Update and Print your product list



3. The product search filters allow you to easily find a specific list of products based on one or more criteria so you can efficiently add and update products on an ongoing basis.



- Product Name
- SKU
- Status (Active / Inactive)
- Product Type (Product / Digital)
- Purchase Method (One Time / Subscription)
- Price Range
- Categories

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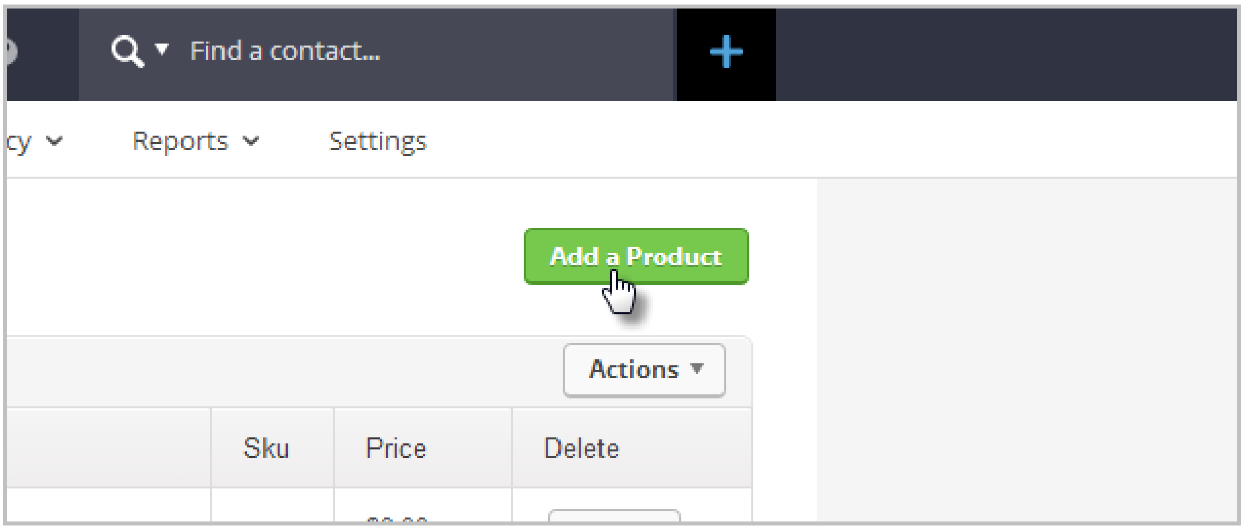
Create A Recurring Subscription Product

Last Modified on 08/01/2018 3:25 pm MST

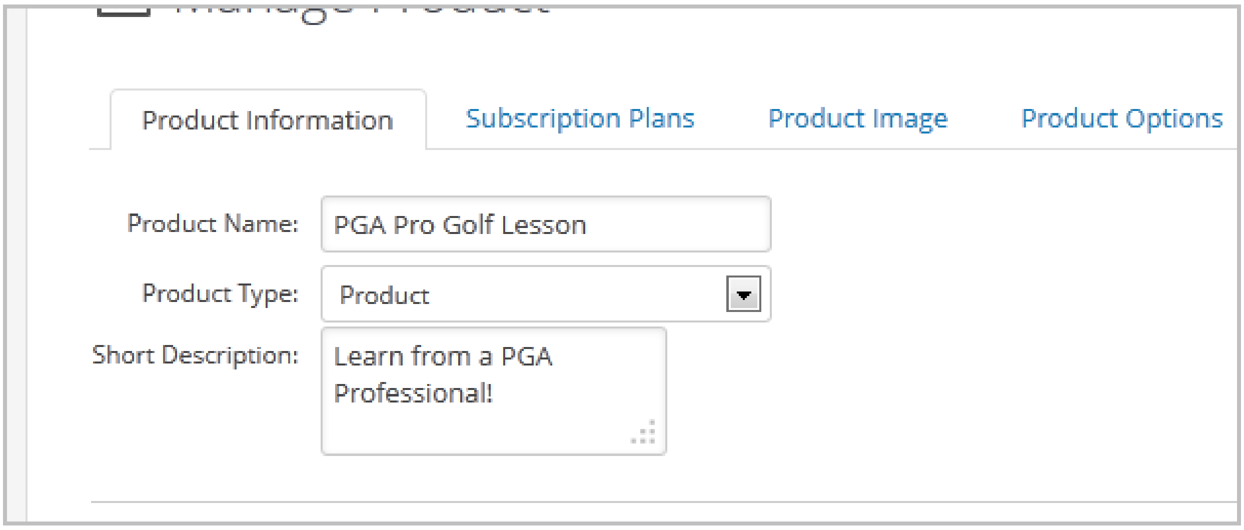
A subscription plan is a purchase method that involves recurring billing intervals (e.g. monthly) as opposed to being a one-time purchase. They are often used in conjunction with a membership program, a recurring service, or a recurring product order (e.g. "book of the month"). A subscription can be set up to bill a fixed number of cycles, or to bill continuously until the customer cancels it. You can create more than one subscription plan for each product, with a choice to bill the same amount for each plan or charge a different amount based on the billing / fulfillment cycle the customer prefers.

1. Go to **E-Commerce** > **Products** in the main navigation menu

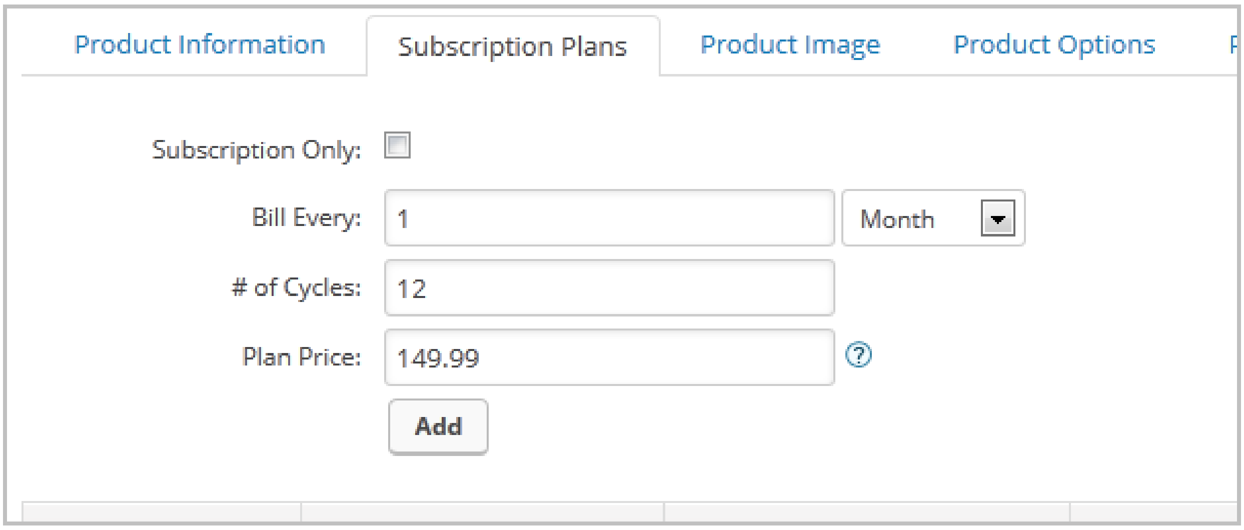
2. Click the **Add a Product** button.



3. Complete the product information. Note: The price is the default price for the product. This price is billed for every one-time purchase (if you allow it) and for each subscription billing cycle. You can override the default when creating individual subscription plans.



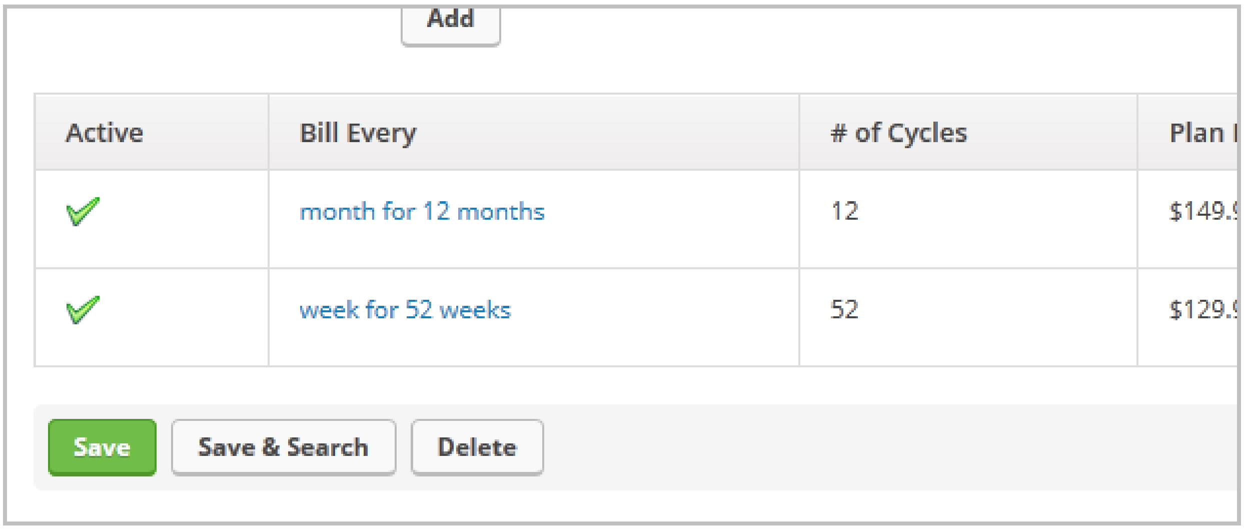
4. Click on the **Subscription Plans** tab to enter the recurring billing options. (Optional) Mark the *Subscription Only* checkbox if this product is not offered for one-time purchase (it is only available through a subscription plan).



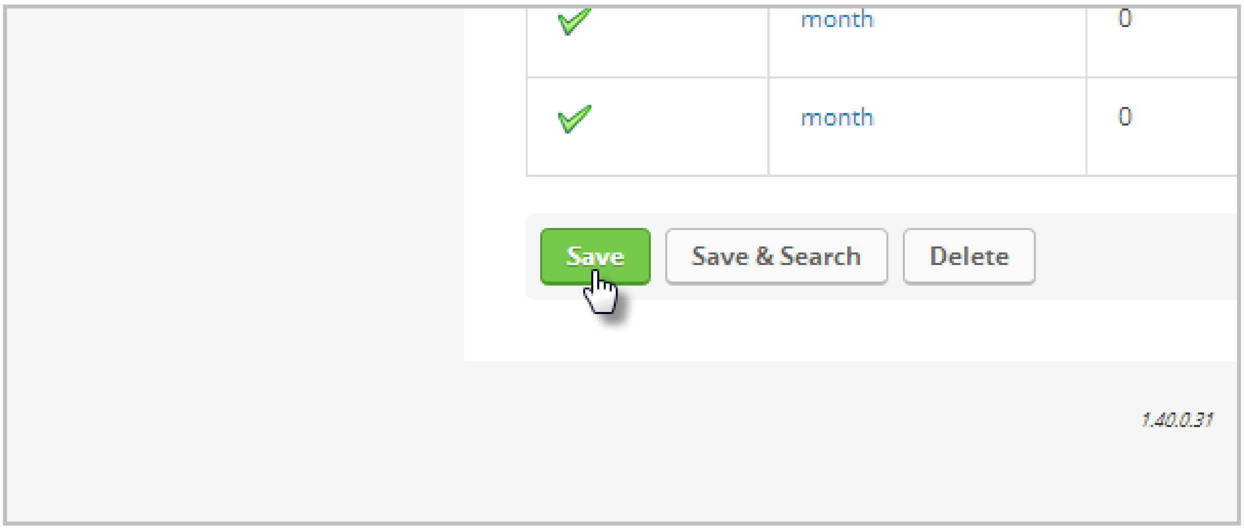
5. Enter the information for the first subscription plan.
   - **Subscription Only**: Check this box if this product can only be sold as a subscription product.
   - **Bill Every**: Enter the frequency and select a time interval (e.g. Every 1 Month).
   - (Optional) **# of Cycles**: Use this field to set an end date for the subscriptions (e.g. If this is a one year program, billed once per month, then the # of cycles is 12) Skip this field if the subscription bills continuously until the customer cancels it.
   - (Optional) **Plan Price**: By default, subscription plans bill the product price you entered when creating the product. Use this field to override the product default for this particular plan.

6. Click the **Add** button. (Optional) Repeat this process to add more subscription plan options for this product. Use the arrows to re-arrange the order the subscription plans

appear in the Infusionsoft storefront.



7. Click the **Save** button.



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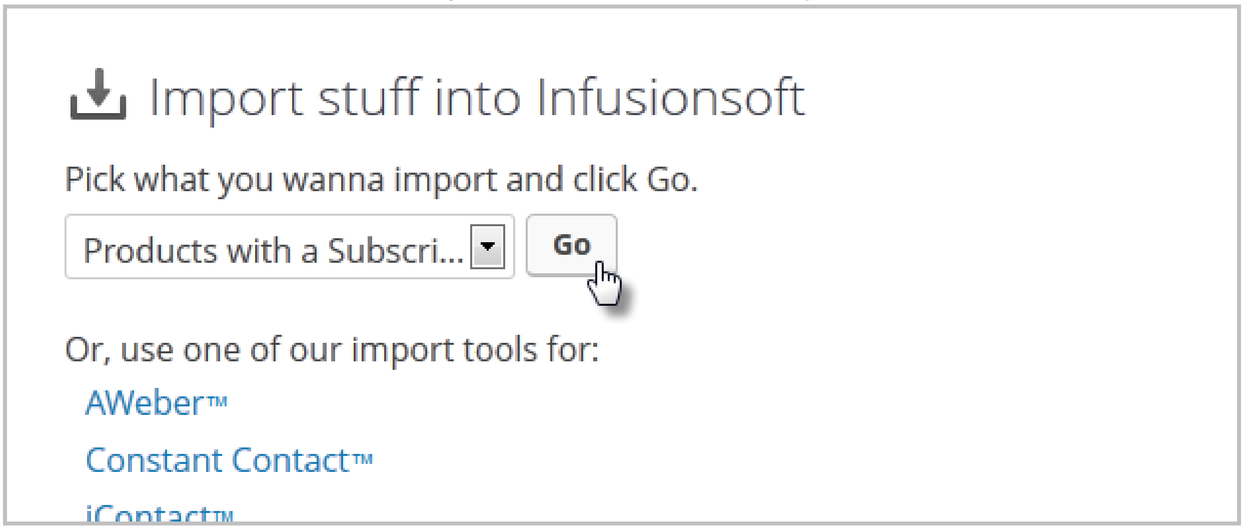
Import A List Of Subscription Products Into Infusionsoft

Last Modified on 08/01/2018 3:25 pm MST

If you have a lot of products or subscriptions, you will want to add them through the import tool. If you are coming from another system, you should be able to export product lists and save them in *.csv* file format.

Note: If you sell both products and subscriptions, you will need to divide them into 2 lists and import the products separately. The subscription import includes additional fields for recurring billing.The Infusionsoft import tool will create the subscription product records with the recurring billing details. After the import, you will still need to edit the product records to add additional description, a product image, and assign the subscriptions to product categories.

1. Go to **Admin** > **Import Data** in the main navigation menu.
2. Select **Products with a Subscription Plan** from the drop-down and click **Go**.


3. Click on **Browse** and select the product file (in *.csv* format) from your computer.
4. Click **Next**
5. Match the Product Fields in your spreadsheet to the following available Infusionsoft fields.

- **Product Name**
- **Product Price**
- **Taxable** (Yes or No)
- **Charge Shipping** (Yes or No)
- **Status** (Active or Inactive)
- **Product Short Description**: This shows up on the Shopping Cart, Order Forms, and on invoices / receipts.
- (Optional) **Product Description**: This is a long description that shows up when the product is displayed in the Infusionsoft Storefront.
- (Optional) **Sku**: This is optional. It stands for Stock Keeping Unit and may correlate with an external inventory management system.
- (Optional) **Weight**: This is used to calculate weight-based shipping.
- (Optional) **Cost per Unit**: This is used to track profit margins.
- (Optional) **Hide in Store** (Yes or No): This is used to hide products from the Infusionsoft Storefront.
- (Optional) **Subscription Only** (Yes or No): This must match up with a column on your import spreadsheet that denotes whether a product is sold by subscription plan only, or not.

6. Match the Subscription Plan Fields in your spreadsheet to the following available Infusionsoft fields.
    - **Frequency**: This will be a number value that, when combined with the cycle, will determine how often the customer is auto-charged for the program. (e.g. 1 per month - 1 is the frequency.)
    - **Cycle**: This is a calendar value that, when combined with frequency, determines how often a customer is auto-charged for the program (e.g. 1 per month - month is the cycle.)
    - **Prorate** (Yes or No): If you set this to *Yes*, the upcoming subscription autocharge amount will automatically adjust when the next bill date is changed for the subscription. This is most commonly used with service subscriptions.
    - (Optional) **Number of Cycles**: This field automatically sets an end date for subscriptions with a limited duration (e.g. 1 year.) If the subscription bills once a month (frequency / cycle) and ends after one year, the number of cycles is 12.
    - **Active** (Yes or No): This shows or hides the subscription option on the product record in the Infusionsoft Storefront and within the Links tab of a product record.

7. Click on the **Next** button.

8. (Optional) Match Field Values
   This step will only show up if you are importing fields that have more than one possible value.

9. Click on the **Next** button.

10. Click on the **Previous** and **Next** Arrows to preview the import before the final step.

11. Click on **Done.**

Create And Organize Product Categories And Subcategories

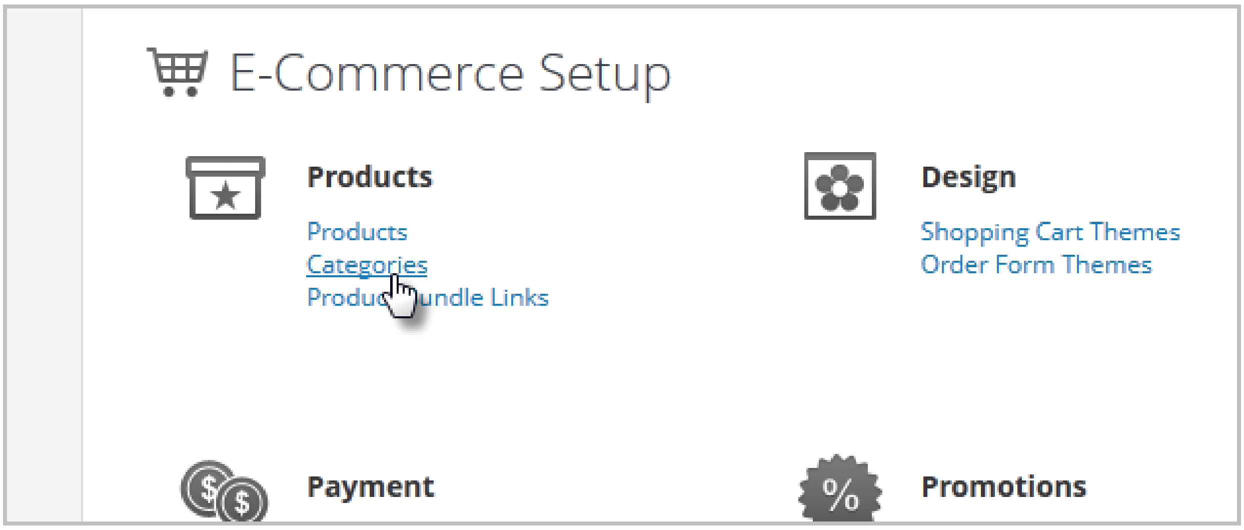
Last Modified on 08/01/2018 3:26 pm MST

Product categories organize the product display in the Infusionsoft storefront. The subcategories organize products within particular categories (e.g. Books = Category, Children's Literature = Subcategory), making it easier for shoppers to find what they are looking for. Product categories and subcategories also organize the product list in the Infusionsoft application (E-Commerce > Products in the master navigation menu). Using categories and subcategories allows you to manage products more efficiently, even if you are not using the Infusionsoft storefront. You can filter the product list by category and create category related discounts.

After creating categories and subcategories, you will need to update products to assign them to one or more category. Note: You are also able to create new product categories "on the fly" as you add or edit a product (shown below.)

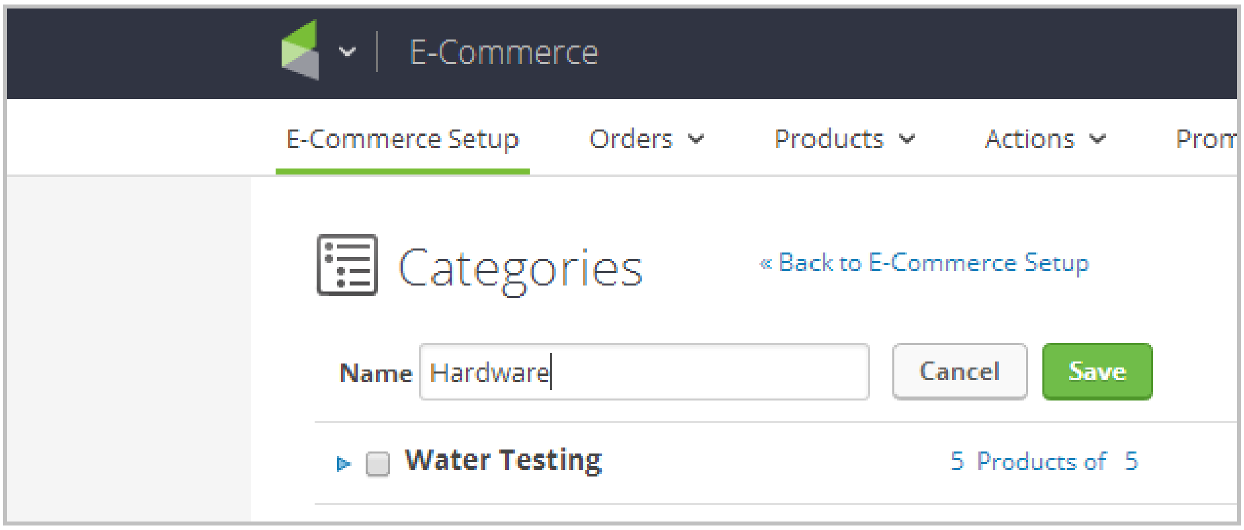
1. Go to **E-Commerce > E-Commerce Setup** in the main navigation menu.

2. Under **Products**, click on **Categories**.



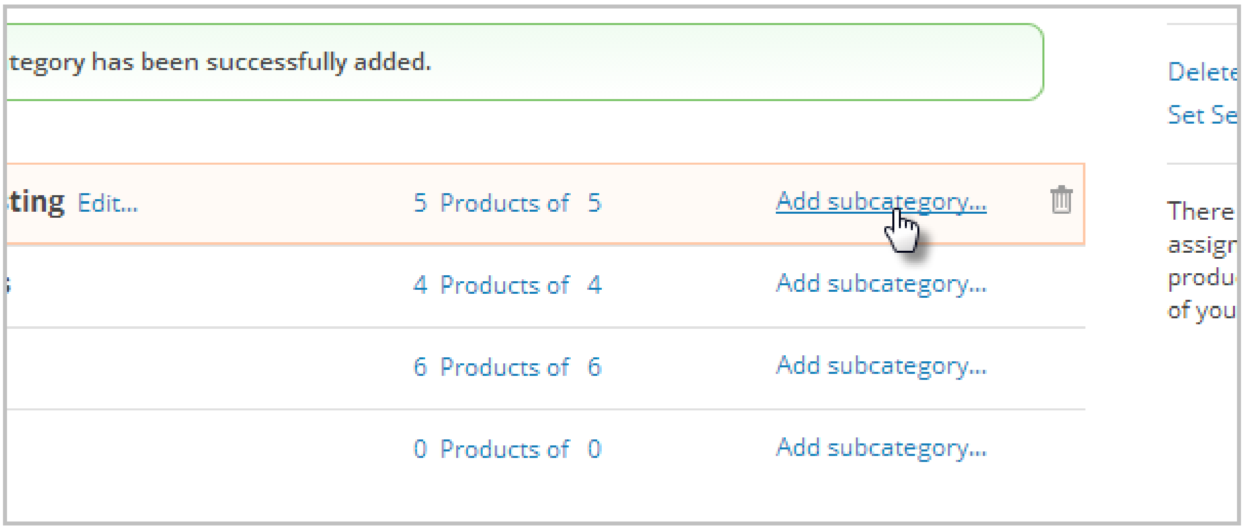
3. Click on the **Add new Category** button.

4. Enter a category name and click on **Save**.

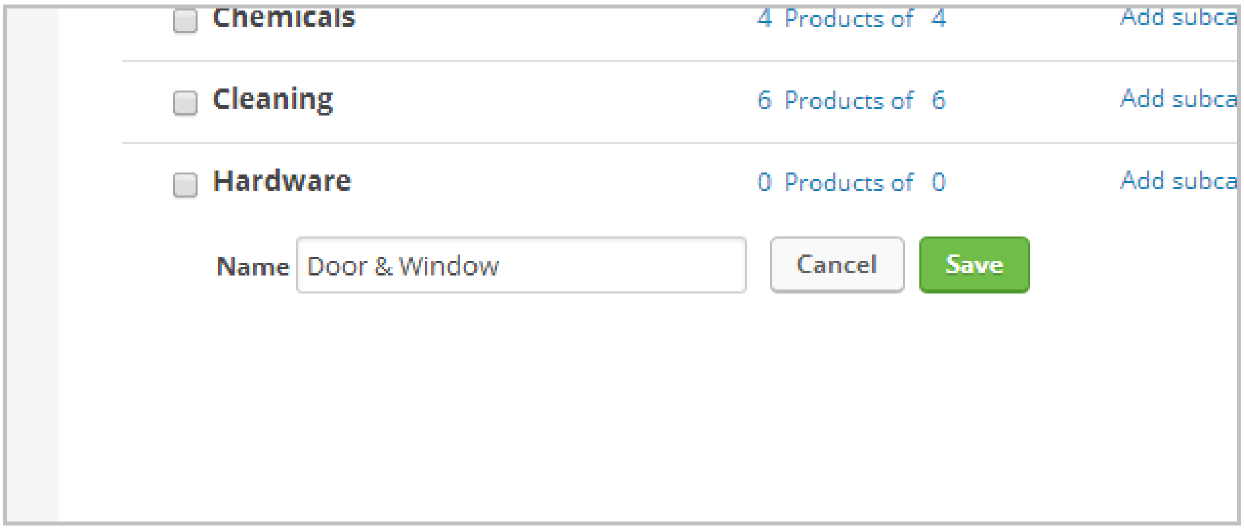


5. Repeat this process to add more product categories.

6. (Optional) Click on the **Add subcategory...** link below one of the categories.



7. Enter the subcategory name and click on **Save**.

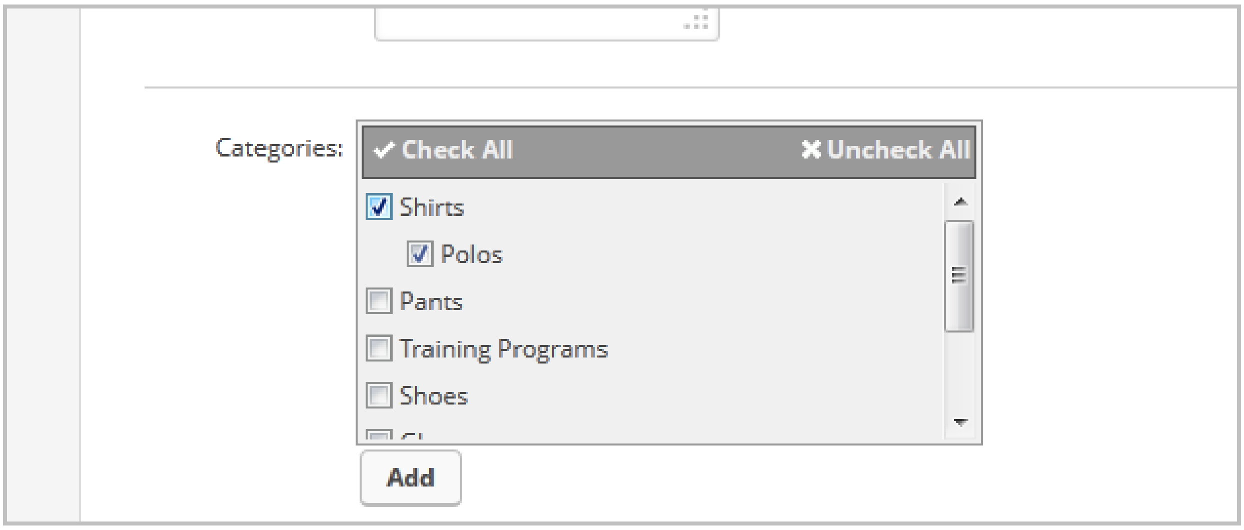


8. Repeat this process to add more subcategories.

Good to know: You can also edit and delete product categories and subcategories from this screen. If you edit a name, it will update everywhere: in the Infusionsoft storefront, in the product list, and in individual product or subscription records. If you delete a category or subcategory, it will be removed from all of these places.

Warning!Before you delete a product category, you should reassign affected products to a new category and/or subcategory, as well as update related product category discounts. Products that are not assigned to a category or subcategory are displayed on the home page of the Infusionsoft storefront.

Pro Tip! You can also manage categories and subcategories while viewing an individual product as well.



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Product Options

Last Modified on 08/01/2018 3:26 pm MST

You are able to add product options to an existing product record. These options give your customers the ability to select preferences when purchasing from an order form or from the shopping cart. You can also adjust pricing based on a product option selected (e.g. Charge $2 more for a large or extra large shirt.)

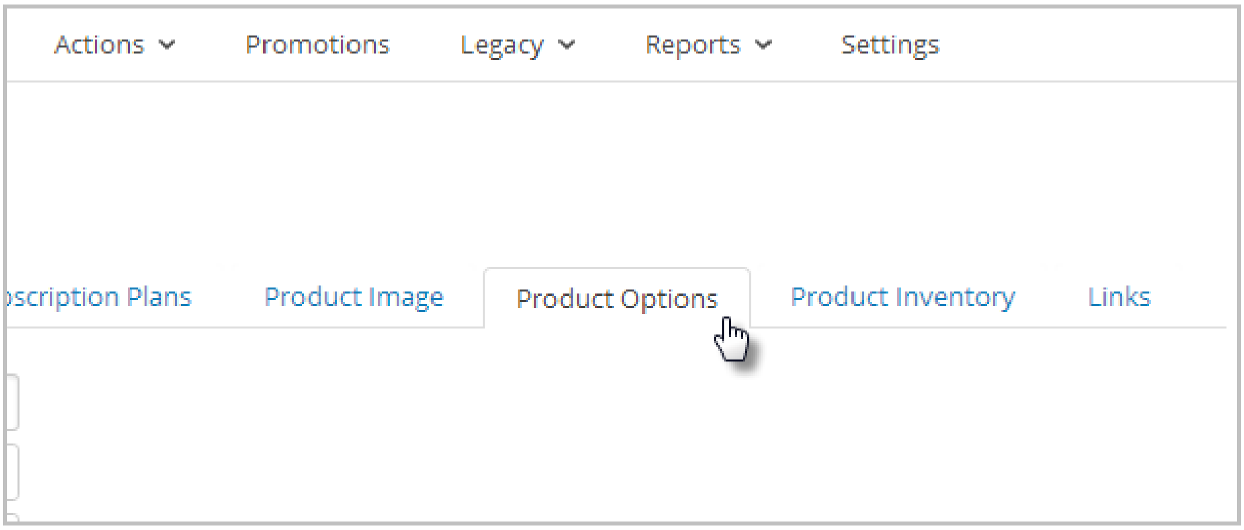
You can pre-define a drop-down list for each option (e.g. a list of colors) or allow the buyer to type in an option (e.g. initials to be embroidered.)

Please note: Product options are only available to your customers when they are browsing your shopping cart or if you use order forms. Product options are not available when sending product purchase links.

Important Note! There can only be up to 3 product options, per product. These options will only be reported in the order itself, and in fulfillment reports.

1. Go to **E-Commerce** > **Products** in the main navigation menu

2. Click on the name of a product to edit it, then click on the**Product Options** tab.



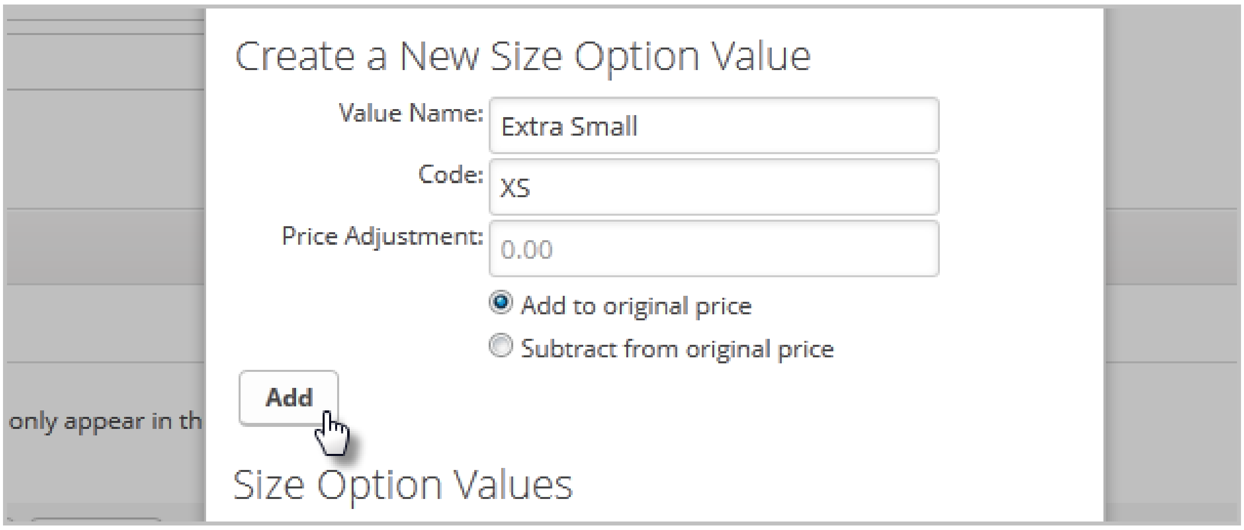
3. Enter the Name (e.g. Size.) The customer will see this name when they view the product in the Infusionsoft storefront.

4. Select the **Option Type**:
    - **Selected from a Fixed List**: This creates a drop-down list and the customer chooses from your list of options (i.e. small, medium, large, extra large.) The customer can't add to or change this list.
    - **Variable (option is typed by the end-user)**: This creates a text field and the user enters information into it that is specific to their situation (e.g. monogram initials.)

5. Set the **Required** field. It is set to *Yes* by default. This means the customer must select a preference before checking out. Select *No* if the product option information is not required.

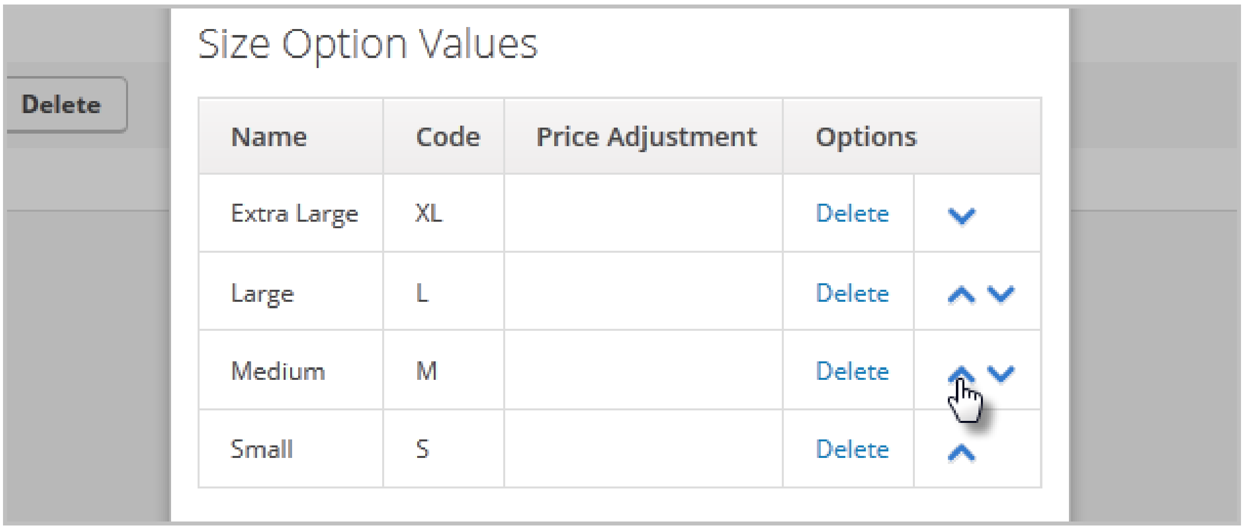
6. Enter the option values and click the **Add** button.
    - For option type **Fixed List**, see **Step 7**.
    - For option type **Variable**, see **Step 8**.

7. If the option type is a *Fixed List*, enter the option values.

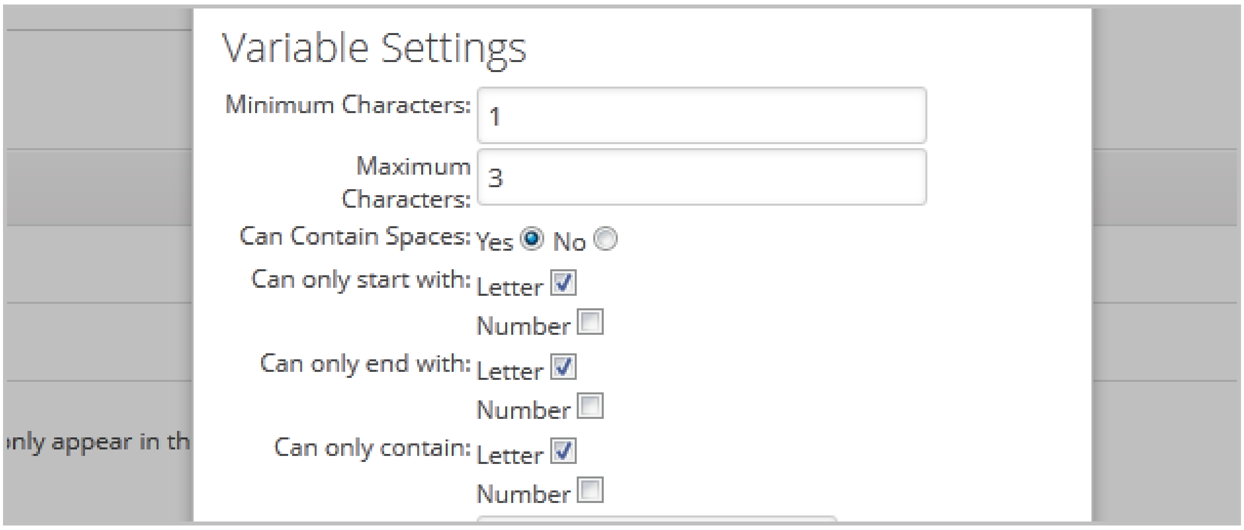


    - The value name appears in the drop-down list your customers see on an order form or on the shopping cart storefront.
    - The *Code* is used as a SKU for that option and appears in the fulfillment report and on the order receipt.
    - (Optional) Enter a dollar amount for the price adjustment if the value (e.g. Extra Large) costs more or less than the standard price. *Note: The amount you enter is added to the standard product or subscription plan price by default. Select Subtract from the original price to lower the price instead.*
    - Once the values have been added, you can use the arrow buttons to reorganize

them on the drop-down list.



8. If the Option Type is *Typed by the end-user*, you will define variable settings instead of values.
   These settings restrict what the customer can enter into the field. The variable settings help you minimize the number of invalid entries. The error message is displayed to customers when the product option entry does not comply with the variable settings.



9. After you enter the variables, click the **Save** button.

10. Repeat this process to add more product options.

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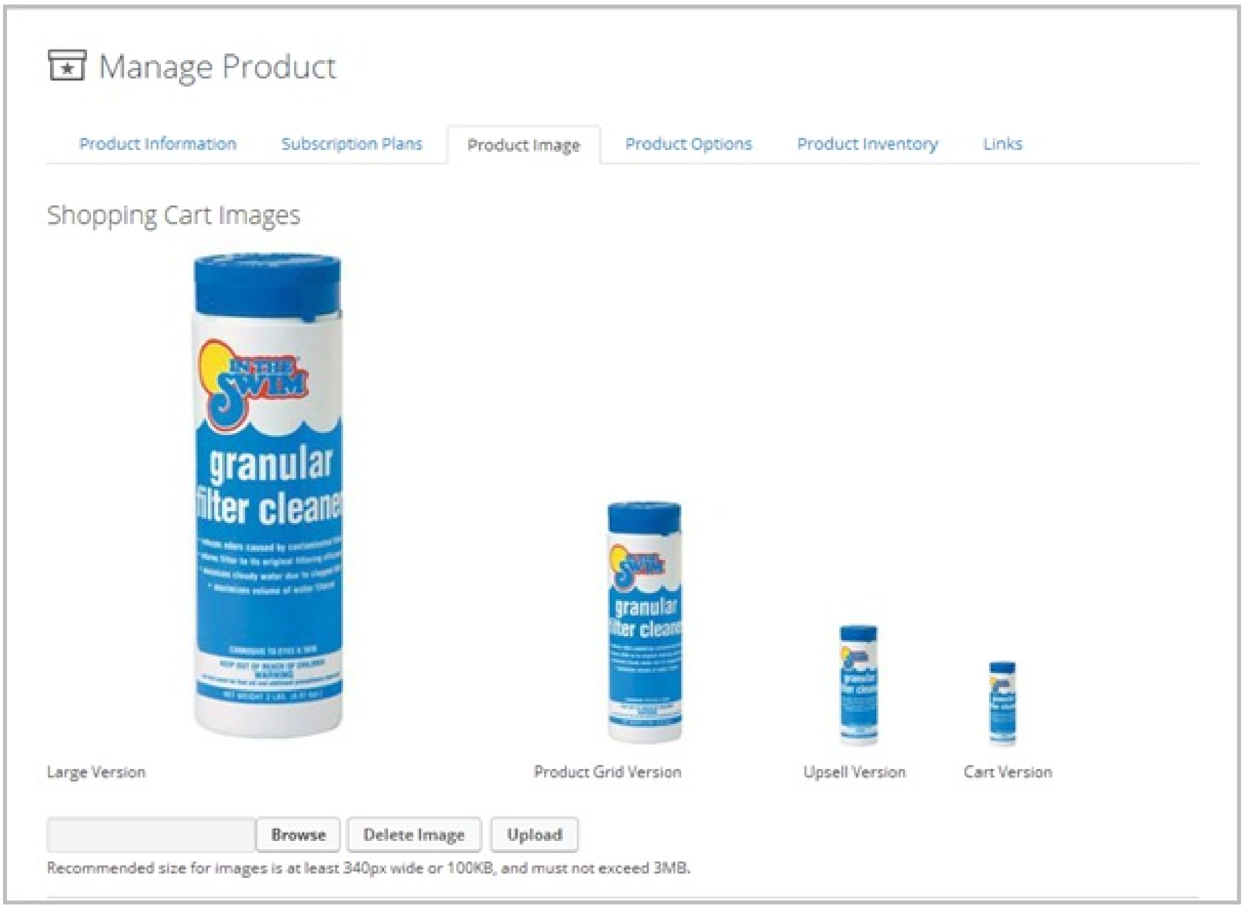
Manage Product Images

Last Modified on 08/01/2018 3:27 pm MST

For the best display, the image must be at least 340 x 340 pixels and no more than 3 MB in size. The image is re-sized to display properly in the storefront, shopping cart, and Infusionsoft product list.



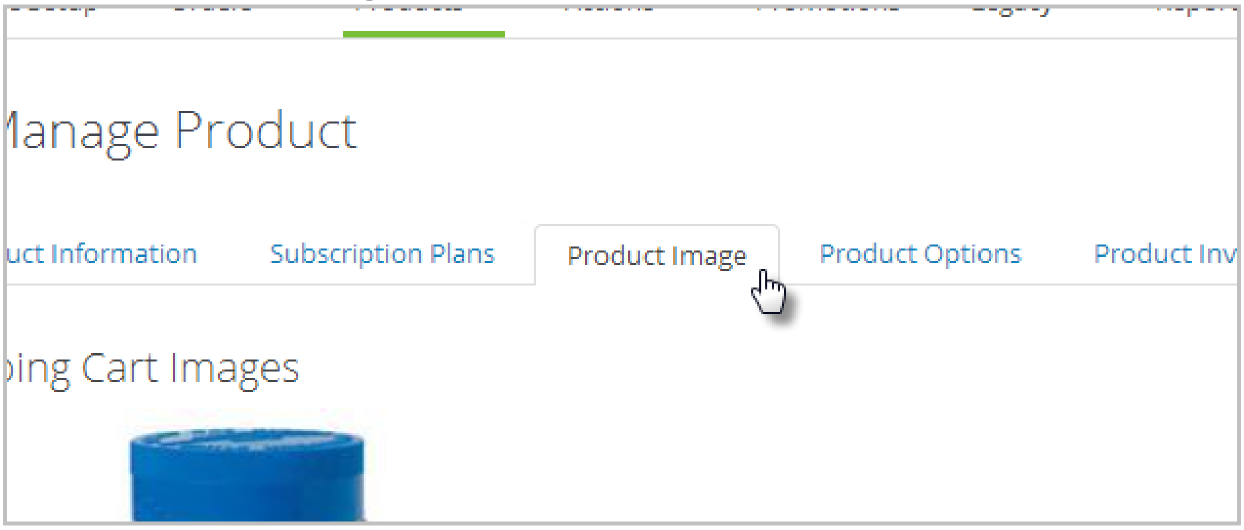
Product images are displayed:

- On the product category page of the Infusionsoft storefront.
- In the product page in the Infusionsoft storefront
- In the checkout summary in the Infusionsoft shopping cart
- In shopping cart upsell promotions
- In the product list inside of Infusionsoft
- On order forms

1. Go to **E-Commerce** > **Products** in the main navigation menu.

2. Click on the name of a product to edit it or click the**Add a Product** button on the top right of the screen to create a new one.

3. Click on the **Product Image** tab.



4. Click on **Browse** to select an image from your computer and then click **Upload** to complete the process.

5. Click **Save** when you are done. Click on **Delete Image** to remove an image completely.

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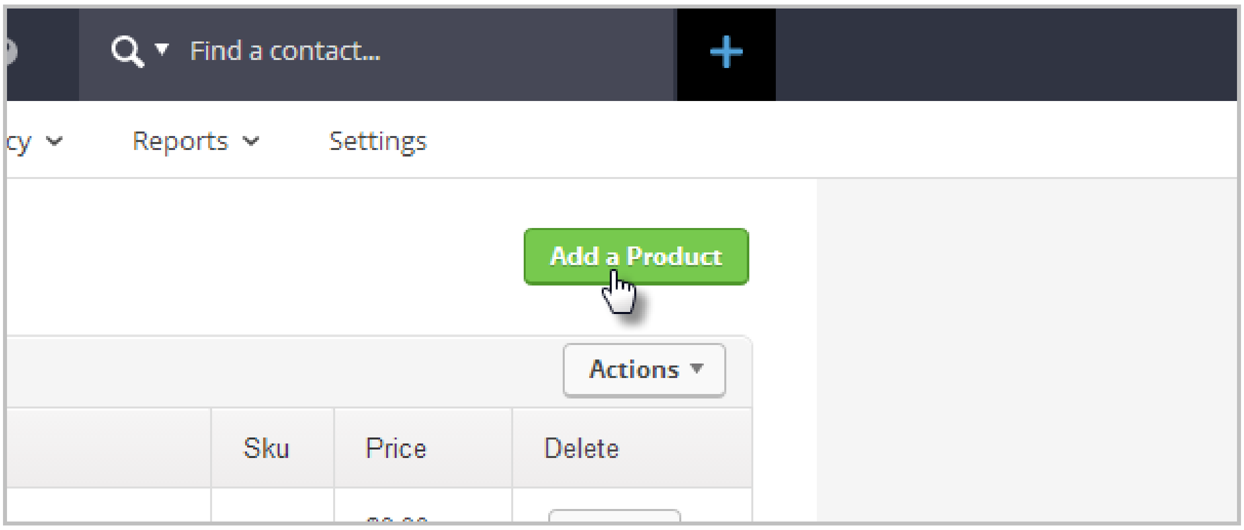
Create Digital Products In Infusionsoft

Last Modified on 08/01/2018 3:28 pm MST

If your company sells digital products, like eBooks or audio downloads, you will need to create digital products in Infusionsoft. A digital product is specially designed to store the product file (under 10 MB), deliver a download link, and enforce download limitations. If you imported a product list, you will need to edit the records for the digital products to set up the delivery details.

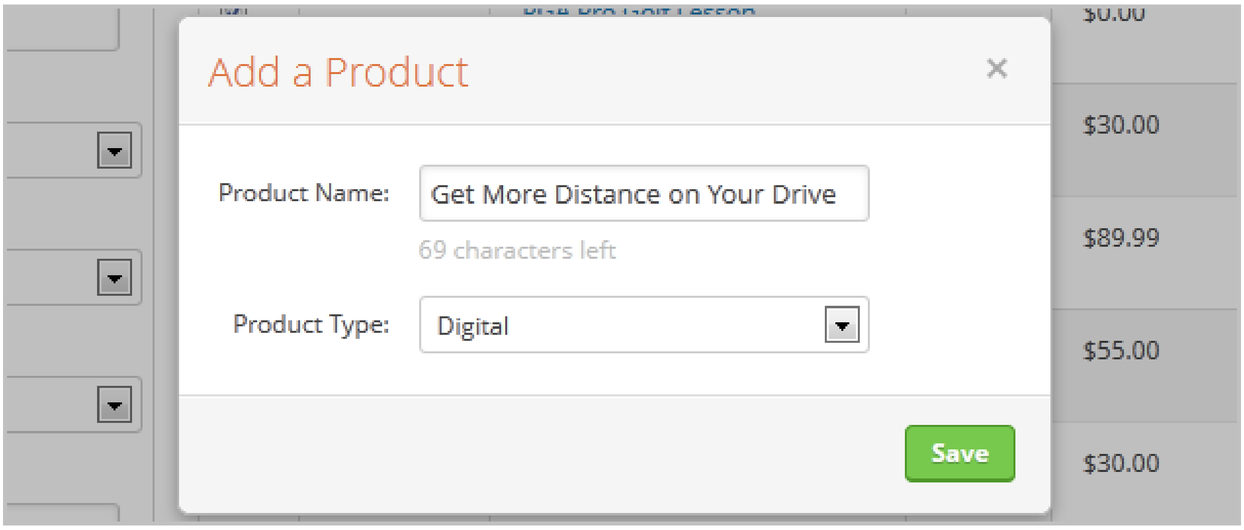
You can add, view, and delete digital product files through individual product records or through the Digital Products area of the company file box.

1. Go to **E-Commerce** > **Products** in the main navigation menu
2. Click on the **Add a Product** button.



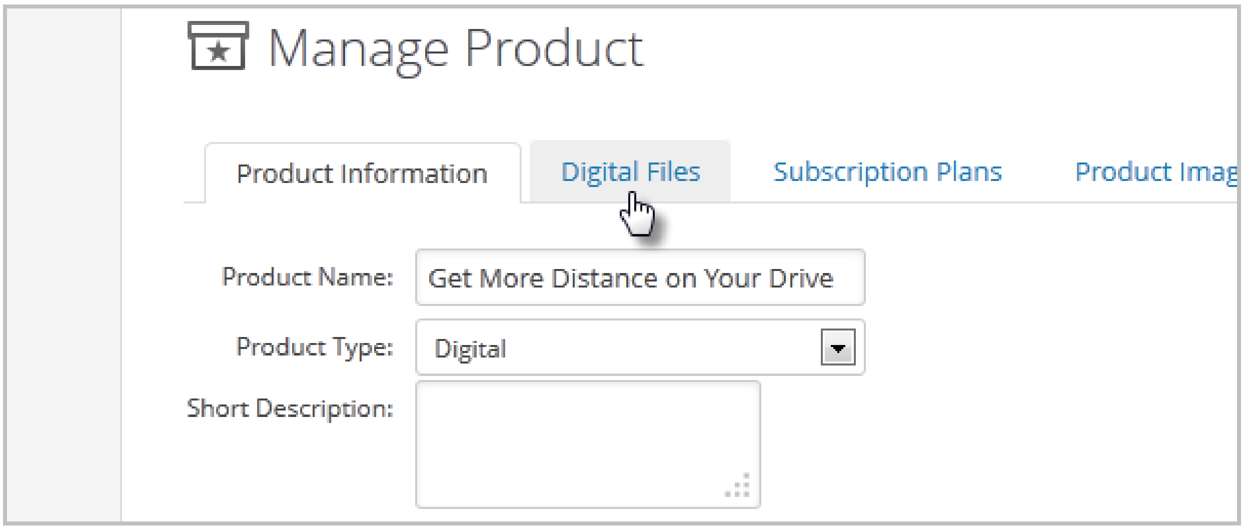
3. Enter a Product Name. This name is displayed to your customers and on the product list inside of Infusionsoft.

4. Select **Digital** from the type drop-down and click on the **Save** button.

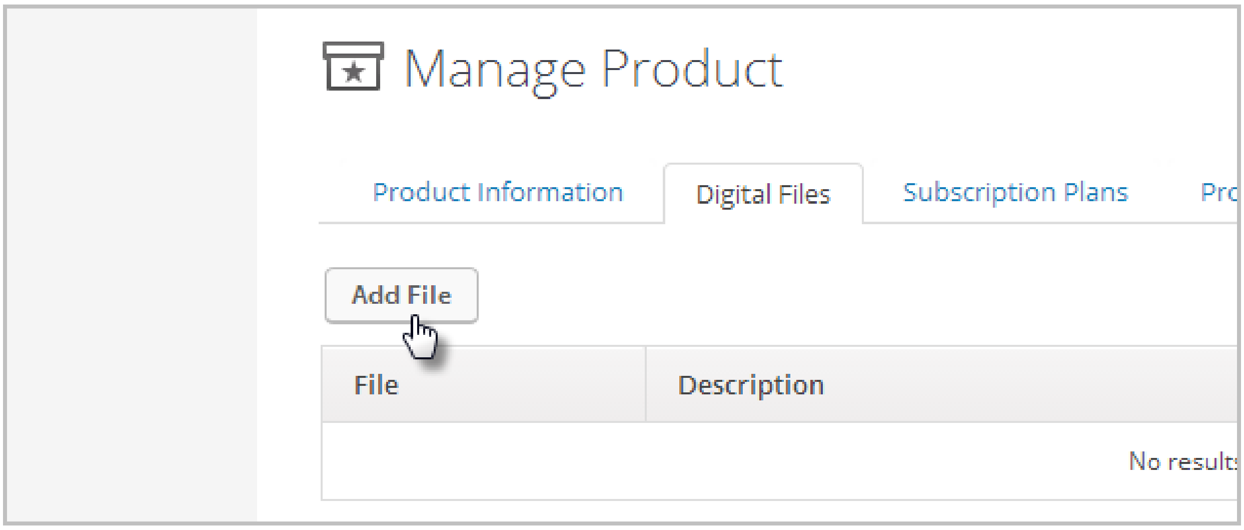


5. Enter the product information and **Save** the product.

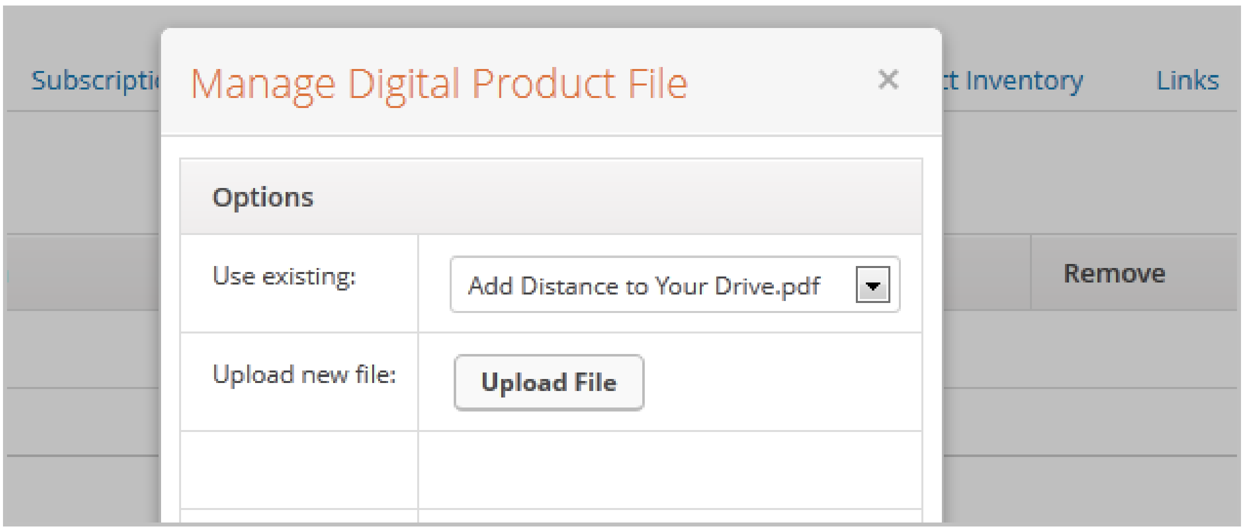
6. Click on the **Digital Files** tab.



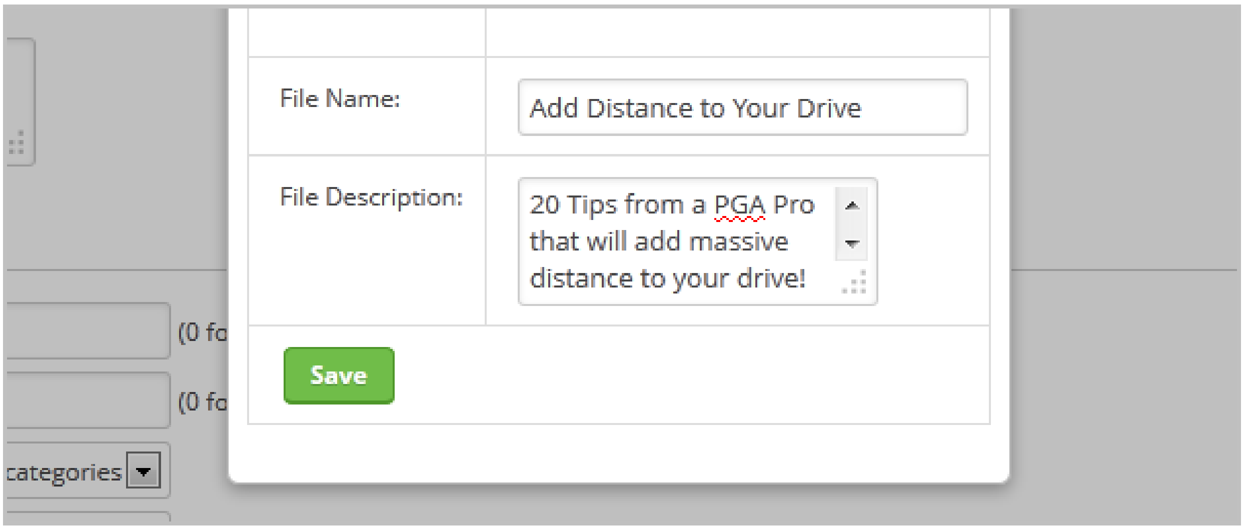
7. Click on the **Add File** button.



8. Select a file from the drop-down or click on the **Upload File** button.



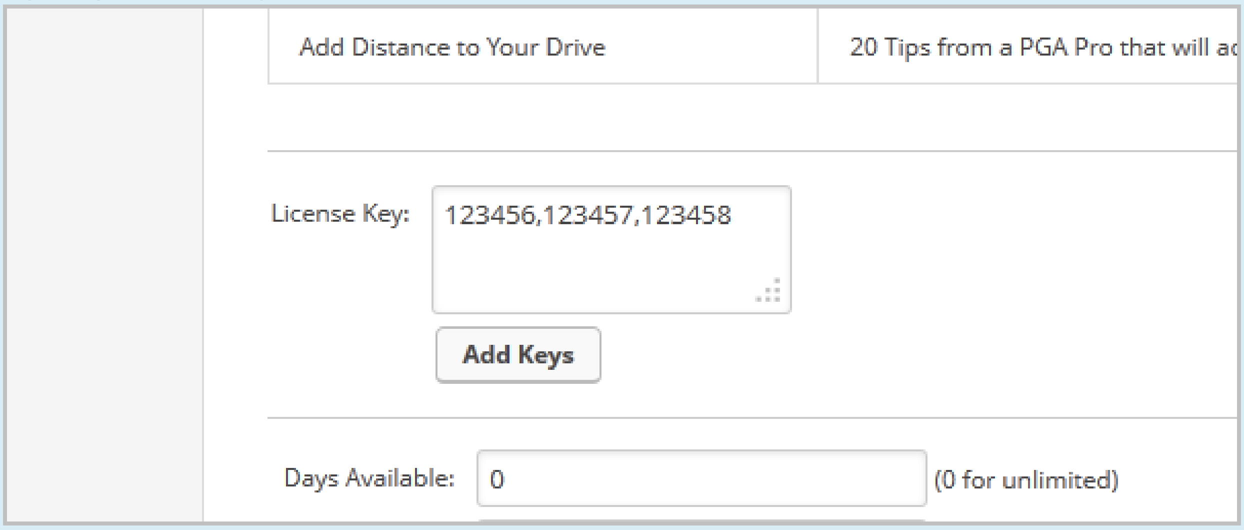
9. Enter the digital file information



- File Name: Enter the name of the product here. Customers will see the name in the product delivery email.
- File Description: Enter a brief internal description of the file context. This shows up in the summary page.

10. (Optional) Repeat the process to add more files for this product.

11. (Optional) License Keys: This feature allows you to insert an "inventory" of unique digital product keys.

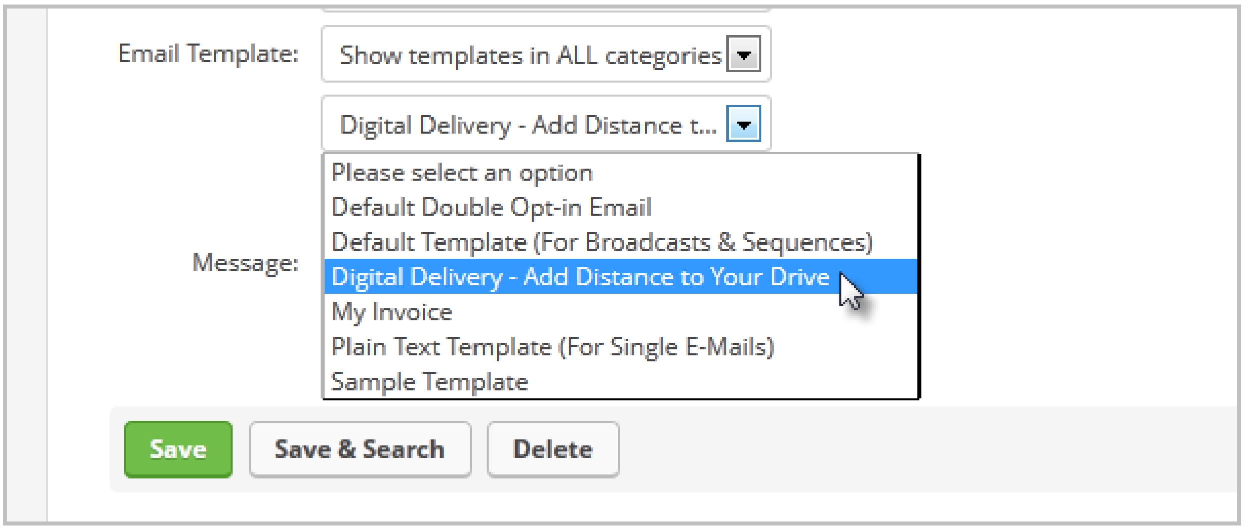


Keys are most often used by software providers whose customers need to insert a key to "unlock" their product. You will use a merge field in an email to insert a unique license key for each customer. You must separate the product keys with commas. Copy and paste the keys into the license key field and then click on the **Add Keys** button.

Pro Tip! You can use the Product Inventory tracking feature to receive an alert when the key codes get low.

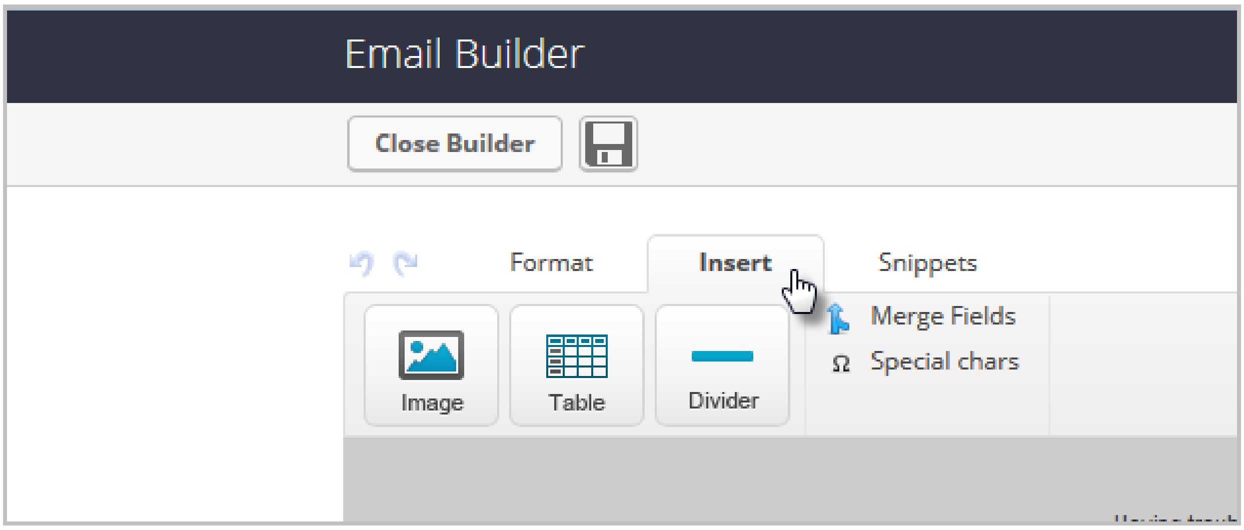
12. Set up download restrictions.
    These restrictions help minimize unauthorized distribution of the digital product.
    - **Days Available:** This option limits the download time frame to a specific number of days. If the customer waits to download the product, this time limit may prevent success. The default is 0, which means there is no time limit.
    - **Download Limit:** This limits the number of times a customer can download the file. It tracks the number of clicks on the download link in the email (not successful downloads). The download link expires when this limit is reached. The default is 0, which means there is no limit to the number of times the customer can download the file.

13. Set up the email delivery template by selecting an existing email template or click on the **Add** button to create a new email template.

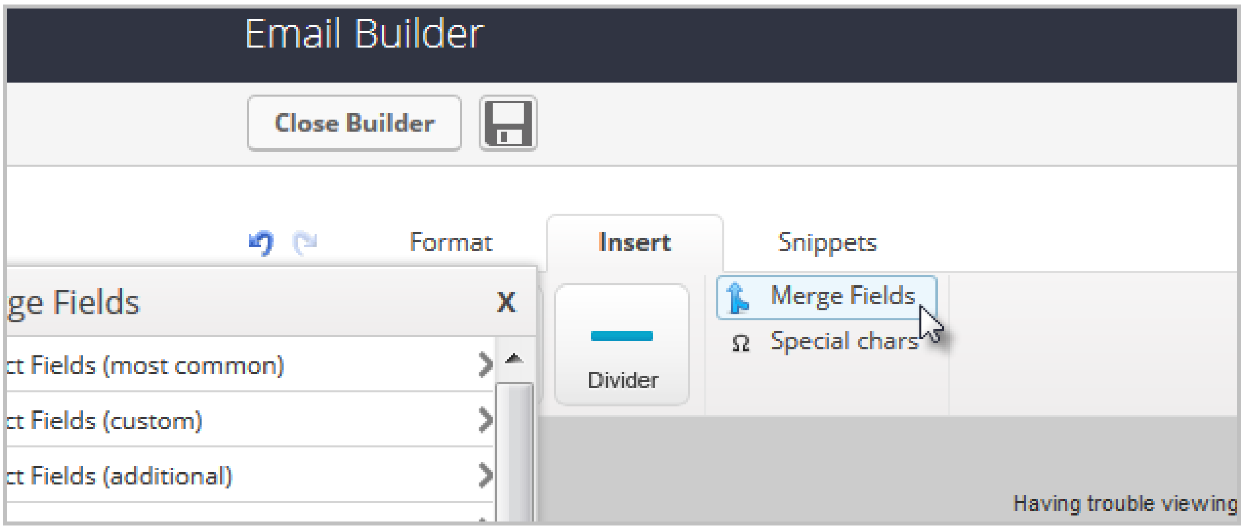


14. Click into the body of the email where you would like to insert the product download link.

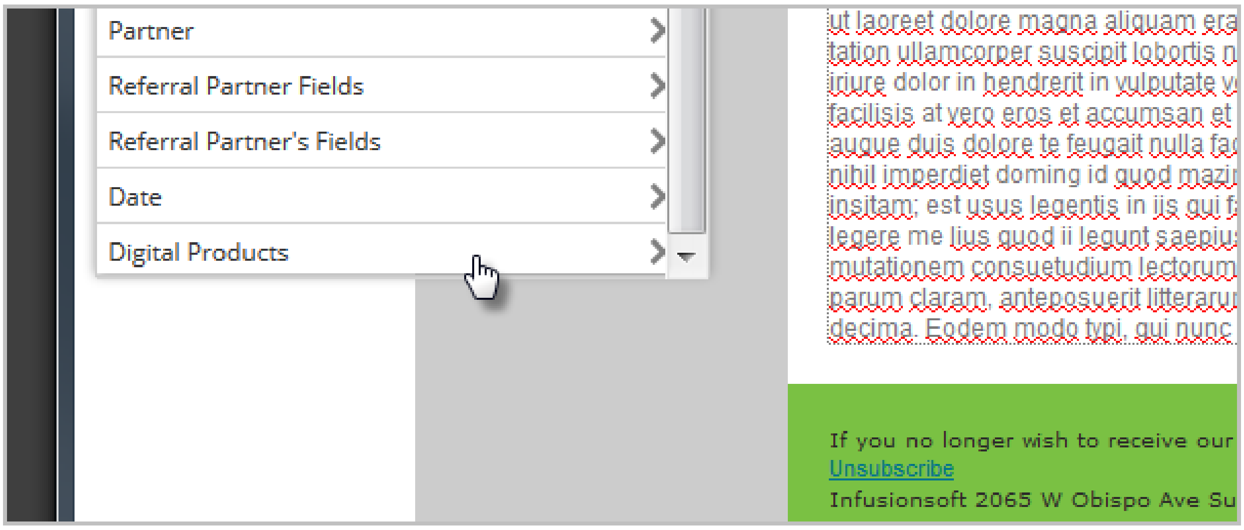
15. Click the **Insert** tab in the email builder



16. Click on the **Merge Field** button



17. Click on **Digital Products** in the merge list and then click on the name of the digital product to insert the digital product information into the email



There are three merge fields for each digital product:

- Digital Product Link: The digital product link is required to download the file(s) for

this product. The download link looks something like this: https://fusebox.infusiontest.com/product.html?code=842f30
- (Optional) Digital Product Code: The code is the number at the end of the download link. It is not required to download the digital product, but can be useful if you need to troubleshoot a customer's download issue. Your customer can give you the code, and you can add it to the link (above) to test the download on your end.
- (Optional) Digital Product Keys: Keys are most frequently used with a software product. The key is not required to download the digital product file, but may be required to unlock the software.

18. Finish editing the email and save the email body changes.
Scroll to the bottom of the email template and set the *Email Readiness* to **Yes**, then click on the **Save** button.

19. Click on the **Save** button to apply the digital product updates.

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How To Create A Paid Trial Subscription

Last Modified on 06/18/2018 2:05 pm MST

Create a pricing plan for a subscription to have an initial price (i.e. a start up price) and a recurring amount that differs.

Please Note! Promotions/discounts can be used in some cases but not all. This does not work for PayPal orders (Infusionsoft does not capture credit card details to bill for the upsell order.)

High-Level Overview:

- Create two separate products, one for initial amount as a one-time purchase, and the other a subscription only.
- Set up automation that creates a subscription order. Two ways to do this: **Campaign Builder** or **Purchase Action**

Important Note! After creating two products, as instructed in the step below, follow **only** "Steps for Campaign Builder Method", or "Steps for 'Purchase Action Method", based on your setup preference. Following both methods for the same subscription will result in duplicate subscriptions being created when a contact triggers the actions!

Create two different products

- The first product will be for a one time product at the “one-time rate.” (i.e. 7 day trial for $7) Do not know how to create a product? Not a problem, follow the steps in this article .
- The second product will be your subscription for the recurring amount (i.e. $49 monthly payment after 7 day trial) Follow this article to know how to create a subscription plan.

Steps for Campaign Builder Method

1. Navigate to **Marketing** > **Settings** > **Action Set**
2. Click **Add an Action Set** Button
3. Give your Action Set a name that would reference what it does
4. Select **Create and Order** in the drop down
5. Click **Save this Action** link
6. Type name of the subscription product created in step 1 then click **Add**
7. Change "free trial days" to desired delay for this subscription to start billing (e.g. for a 7 day trial of $7, set free trial days to "7")
8. Create a Campaign
    - Navigate to **Marketing** > **Campaign Builder** and click the 'Create New Campaign' button.
    - Start campaign with a Purchase Goal . Configure goal to the first product, or the initial product
9. Create a new Campaign Sequence
    - Drag out "Action Set (Legacy)" snippet from Process tab
    - Select the Action Set created in previous steps
    - Set all elements to Ready, Connect your purchase goal to your sequence, and publish the campaign.

Steps for Purchase Action Method

1. Create a Product Specific Purchase Action for one-time purchase product. Remember to create this purchase action for the initial product or first product.
2. Select action to "Create an Order" and click "Save this Action" link.
3. Type the name of the subscription product and click "Add" button.
4. Change "free trial days" to desired delay for this subscription to start billing (i.e. for a 7 day trial of $7, set free trial days to "7")

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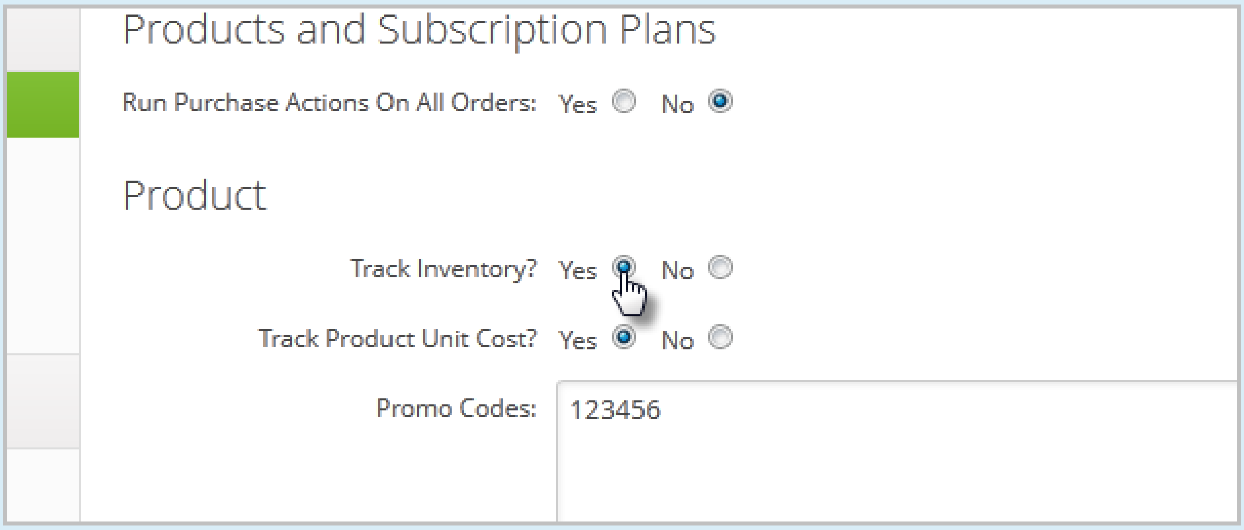
Inventory Notifications And Sold Out Automation

Last Modified on 08/01/2018 3:30 pm MST

Important! Inventory tracking is disabled by default. You must turn it on through **E-Commerce > Settings > Product.**



Basic inventory tracking is integrated with each product record. This feature allows you to put an inventory number into Infusionsoft that is decreased with each purchase made through the shopping cart, an order form, or as part of a manual order. When the quantity reaches a specified threshold, Infusionsoft automatically sends a notification email so that you can re-stock and update the inventory amount in Infusionsoft. This simply alerts you that you need more inventory.

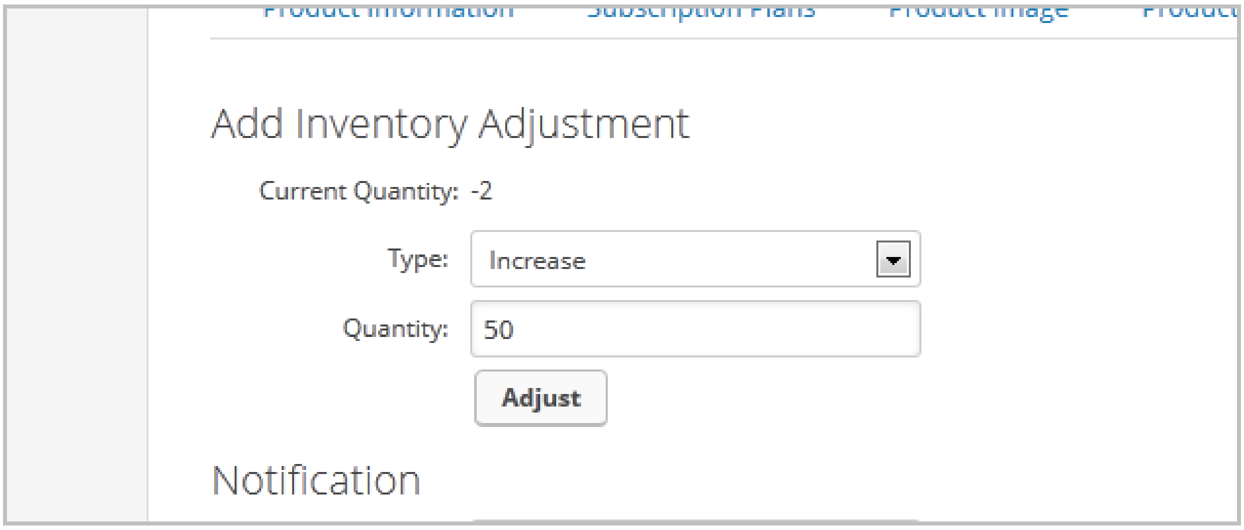
The inventory function can't track orders that are processed outside of Infusionsoft unless you are using a 3rd-party Shopping cart integration like BigCommerce, but you can manually decrease the inventory amount to account for outside sales.

If you check the box (see step 5) the item will no longer be available on order forms or the shopping cart when the inventory amount reaches zero.

1. Go to **E-Commerce** > **Products** in the main navigation menu

2. Click on a **Product**

3. Click on the **Inventory** tab

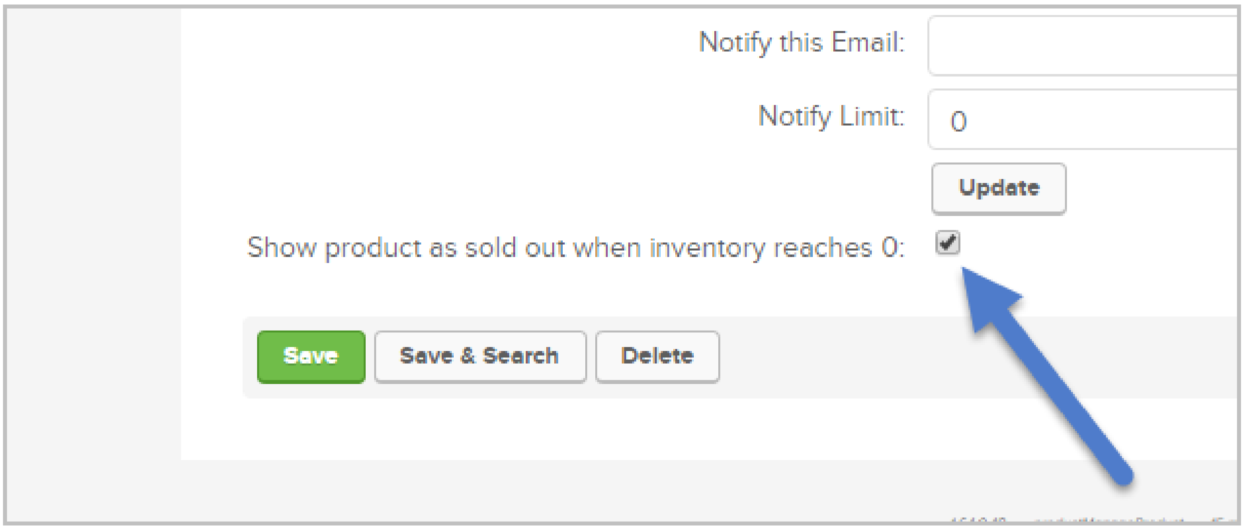


Type: Increase inventory when you've re-ordered items and need to increase the inventory amount recorded in Infusionsoft. Decrease the inventory to manually account for sales made outside of Infusionsoft.

Quantity: Enter a number. If you choose to increase the inventory, this number will be added to the Current Quantity. If you choose to decrease the inventory, this number will be subtracted from the Current Quantity.

4. Click on the **Adjust** button to apply the change

5. Set up a notification email



- **Notify This Email:** Enter the email address that will receive an alert when the

  inventory gets low.
  - **Notify Limit**: Enter the threshold the system will use to trigger the email notification. (e.g. If you enter 10, the system will send the email when the Current Quantity drops to 10.)
  - **Show product as sold out when inventory reaches 0**: Make sure this box is checked so that the item will no longer be available on order forms or the shopping cart when your inventory drops to zero!

6. Click on the **Update** button to apply the change

7. Click on **Save**

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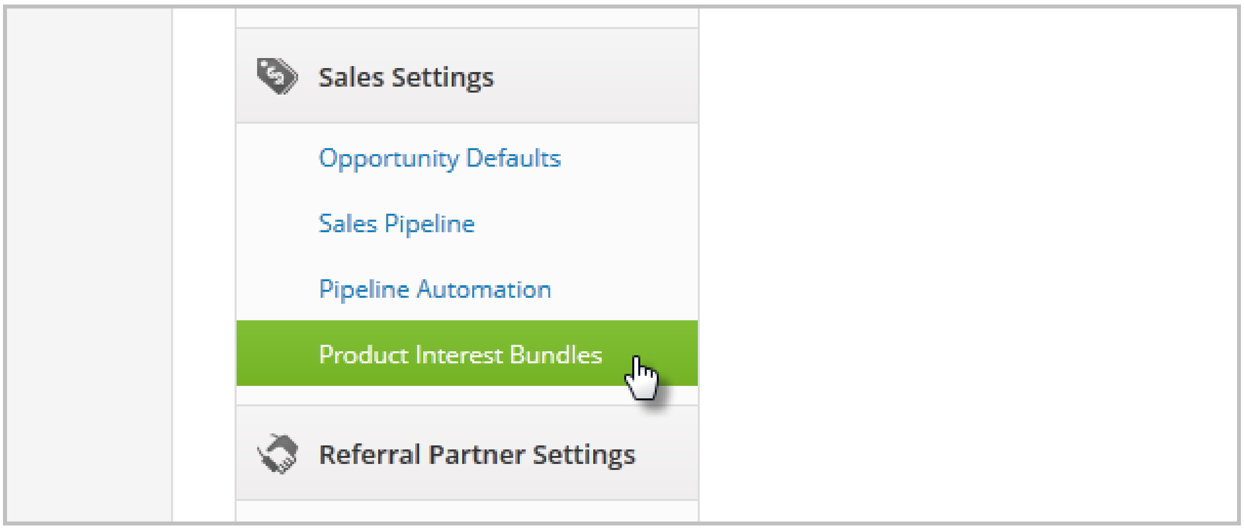
Product Interest Bundles

Last Modified on 08/01/2018 3:30 pm MST

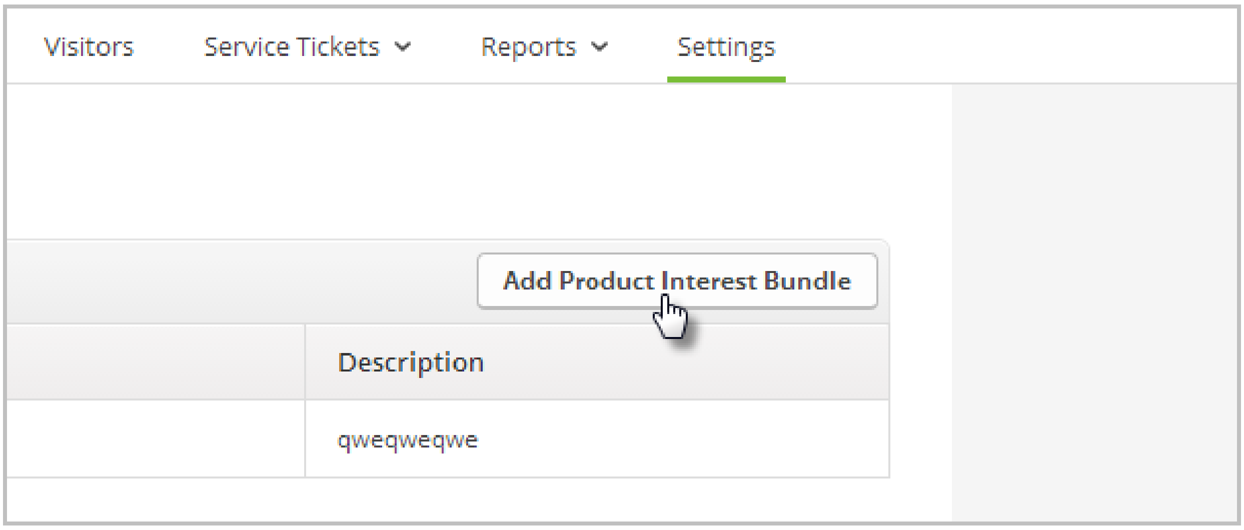
Product interest bundles are groups of products that are commonly purchased together. They can be used to automatically generate the product/subscription program when an opportunity is created through an action, or a sales rep can manually add a product Interest bundle to an opportunity record after talking with a prospect. Using product interest bundles is an alternative to adding products and subscriptions to an opportunity record one at a time. You must add products and subscription program records to Infusionsoft before you create product interest bundles.

You need to enter product and subscription program names while creating the bundles. Before you start, you may want to print a list of products (**E-Commerce** > **Products**) to reference.

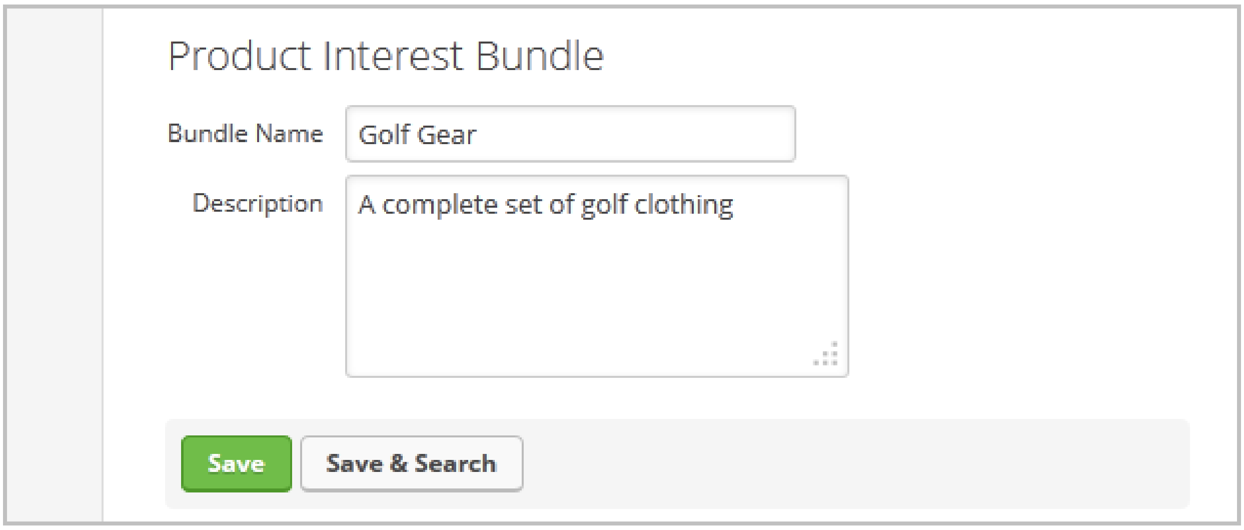
1. Go to **CRM** > **Settings** in the main navigation menu.
2. Click on **Product Interest Bundles** in the *Settings* menu.



3. Click on the **Add Product Interest Bundle** button.



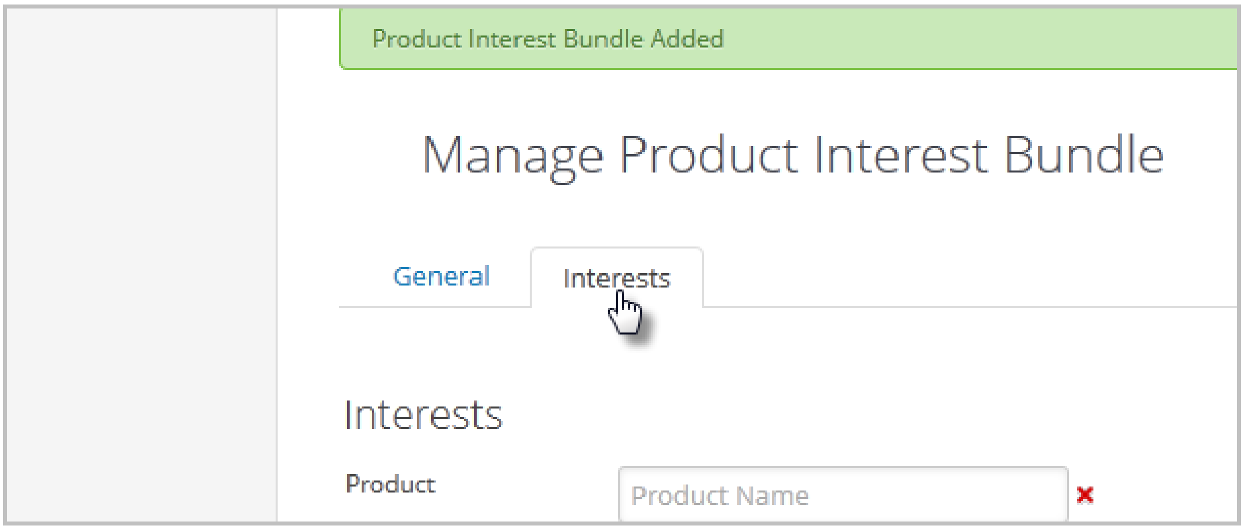
4. Enter the Bundle Name and Description.



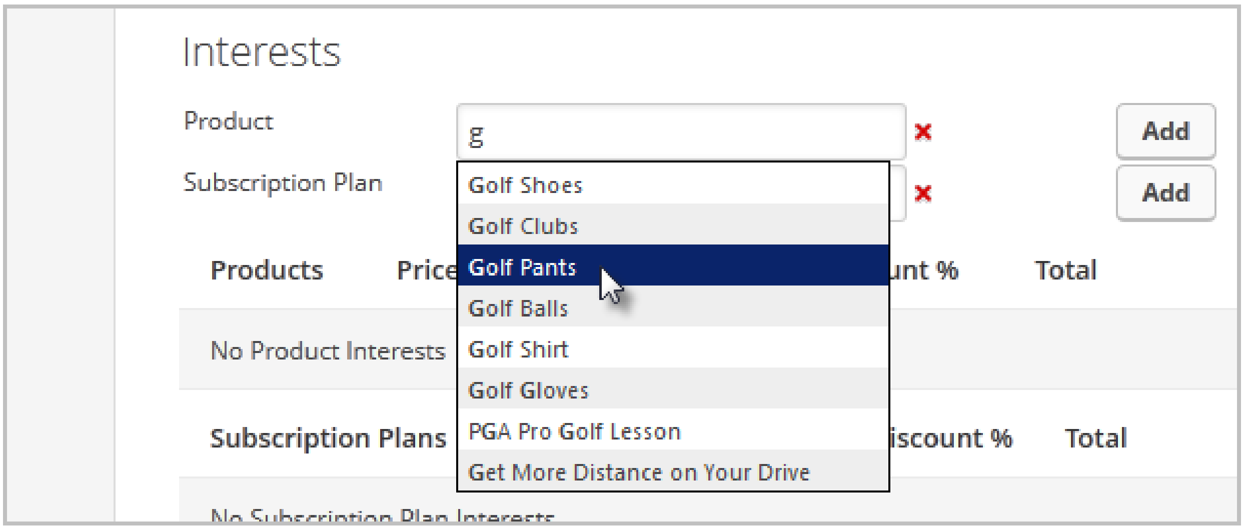
5. **Bundle Name**: Sales reps will need to recognize the bundle by name when adding it to an opportunity record. It should be short but descriptive. The customer will not see this information.

   Description: This is a note to yourself about why you created this bundle and when it should be used. It might also include a date to remove the bundle so that sales reps can no longer use it.

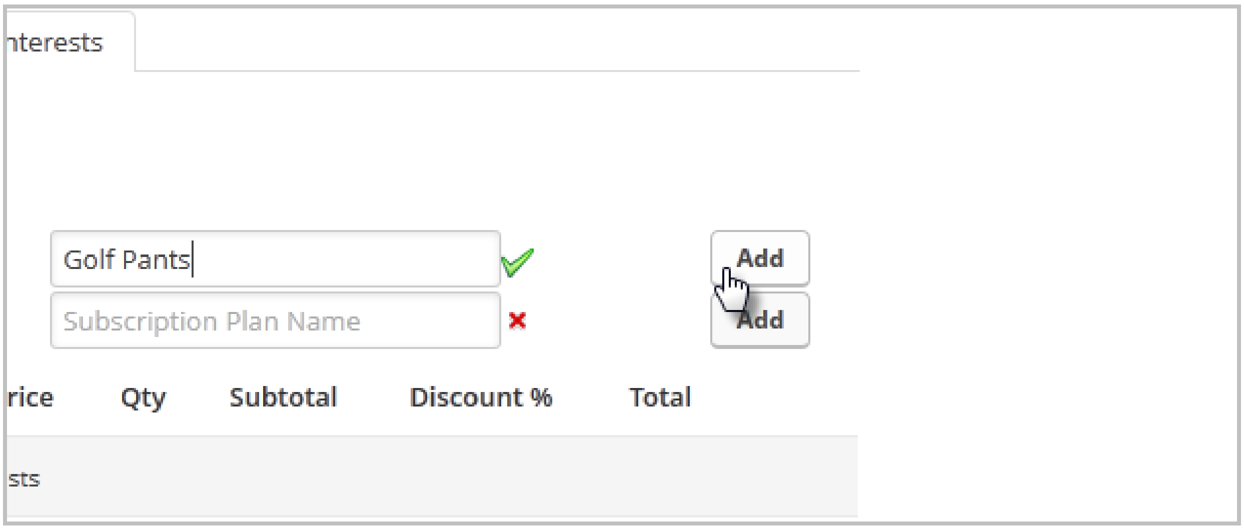
6. Click on the **Save** button. Click on the **Interests** tab to add products to the bundle. You will add one time products and products with subscription plans separately.



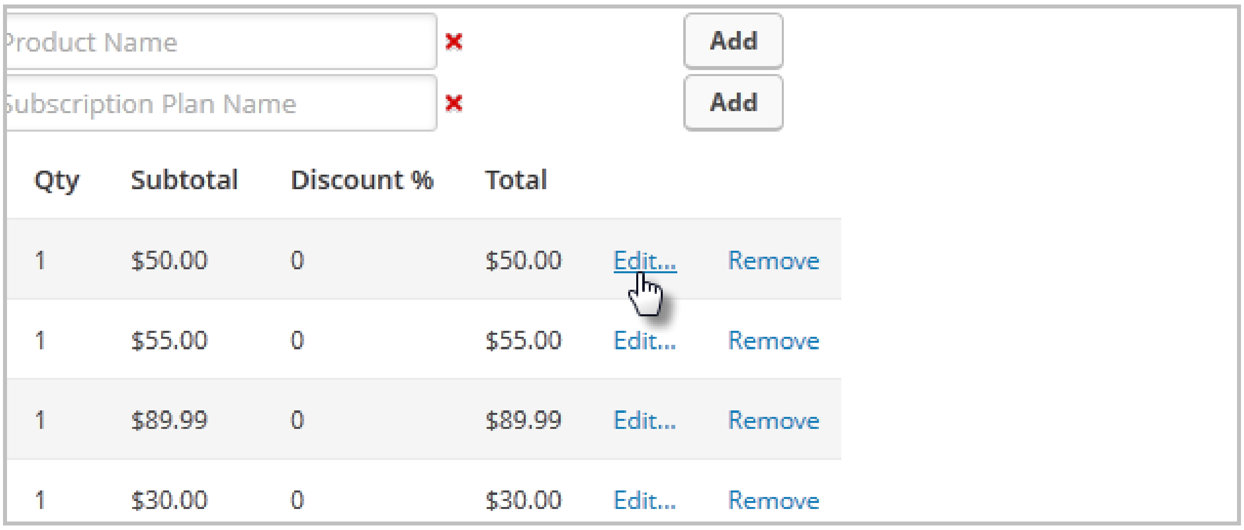
7. Type in the name of a product or subscription program to find possible matches, then click the name of the product in the drop-down to select it.



8. Click on the **Add** button to add the product or subscription to the bundle. Repeat this process to add more products and/or subscription programs.



9. Click on **Edit** to change the quantity and/or apply a discount to an item in the bundle.



10. Click on the **Save** button when you are finished.

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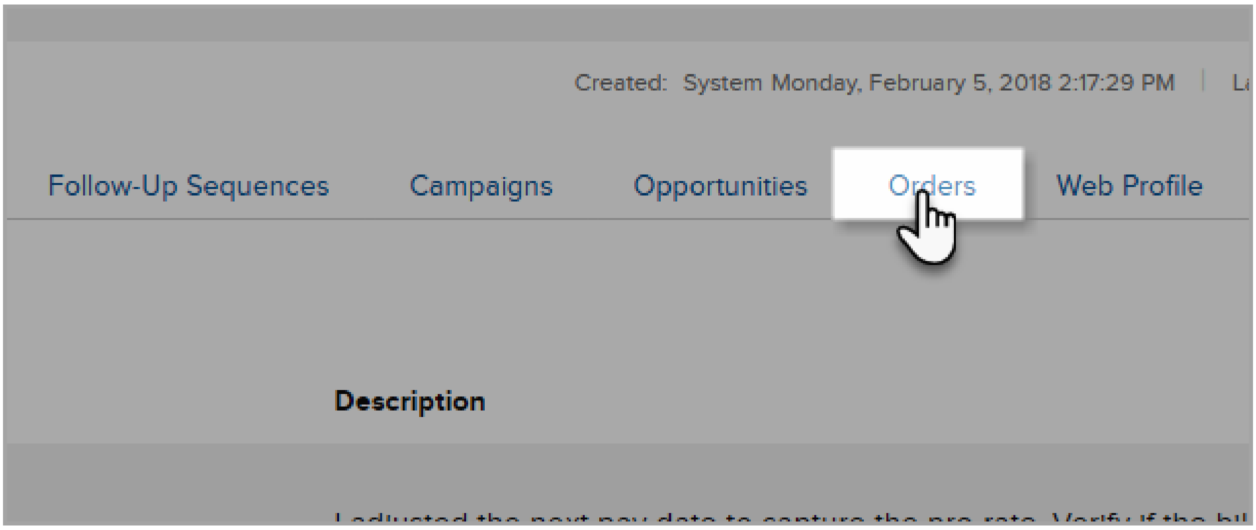
Manage Subscription Record

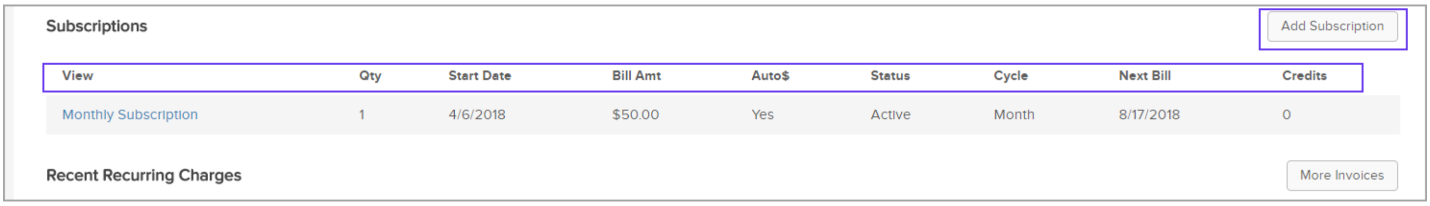
Last Modified on 08/01/2018 3:32 pm MST

After you have created a Subscription Record you can manage it from the Contact's Record.

Within the Contact Record click the '**Orders**" tab which is located on the bottom sections of tabs.



Scroll down to "**Subscriptions**"



View	Qty	Start Date	Bill Amt	Auto$	Status	Cycle	Next Bill	Credits
Monthly Subscription	1	4/6/2018	$50.00	Yes	Active	Month	8/17/2018	0

View - The Subscription product which you would click to access the Subscription record

QTY - The number of items purchased

Start Date - When the Subscription Record was created

Bill Amt - Recurring Billed Amount

Auto$ - Indicator if the auto pay is Active or Inactive

Status - Indicator if the Subscription Record is Active or Inactive.

Cycle - The billing Cycle i.e. Daily, Weekly, Monthly, etc

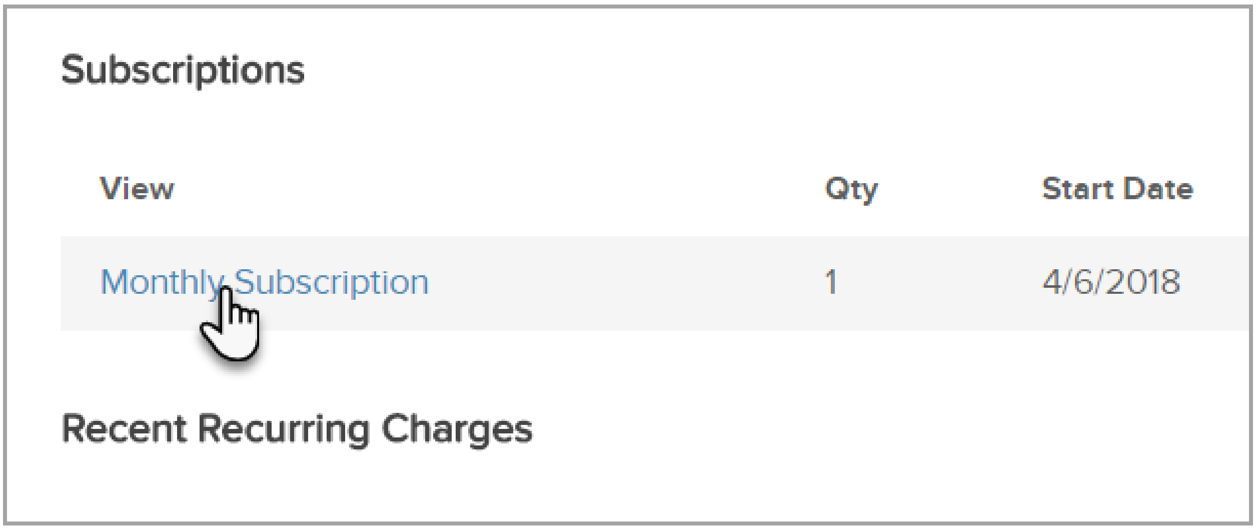
Next Bill - The date the next invoice will be generated and if auto pay is active process payment

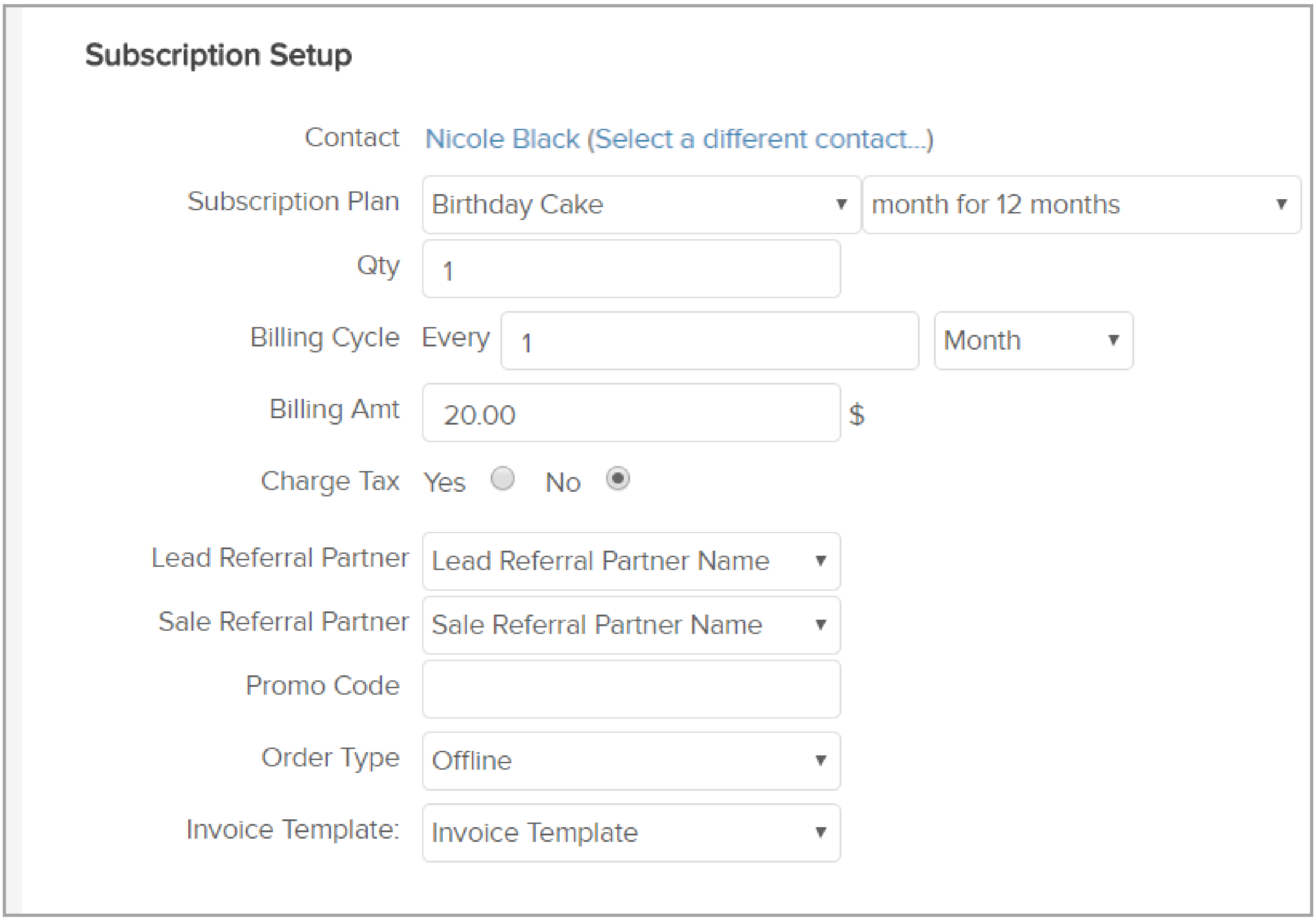
Credits - Number of credits saved to the Subscription record

Add Subscription - Allows you to manually create a Subscription Record

Subscription Setup

Click the **Product Name** of the Subscription located under "View"





Contact: Customer attached to Subscription Record

Subscription Plan: Subscription product and cycle

Qty: Amount purchased

Billing Cycle: How many times the Subscription is billed during the cycle

Billing Amt: The amount billed each cycle

Charge Tax (Optional): Indicator if tax is applied to Invoice

Lead Referral Partner (Optional): Name of Referral partner to receive credit if applicable.

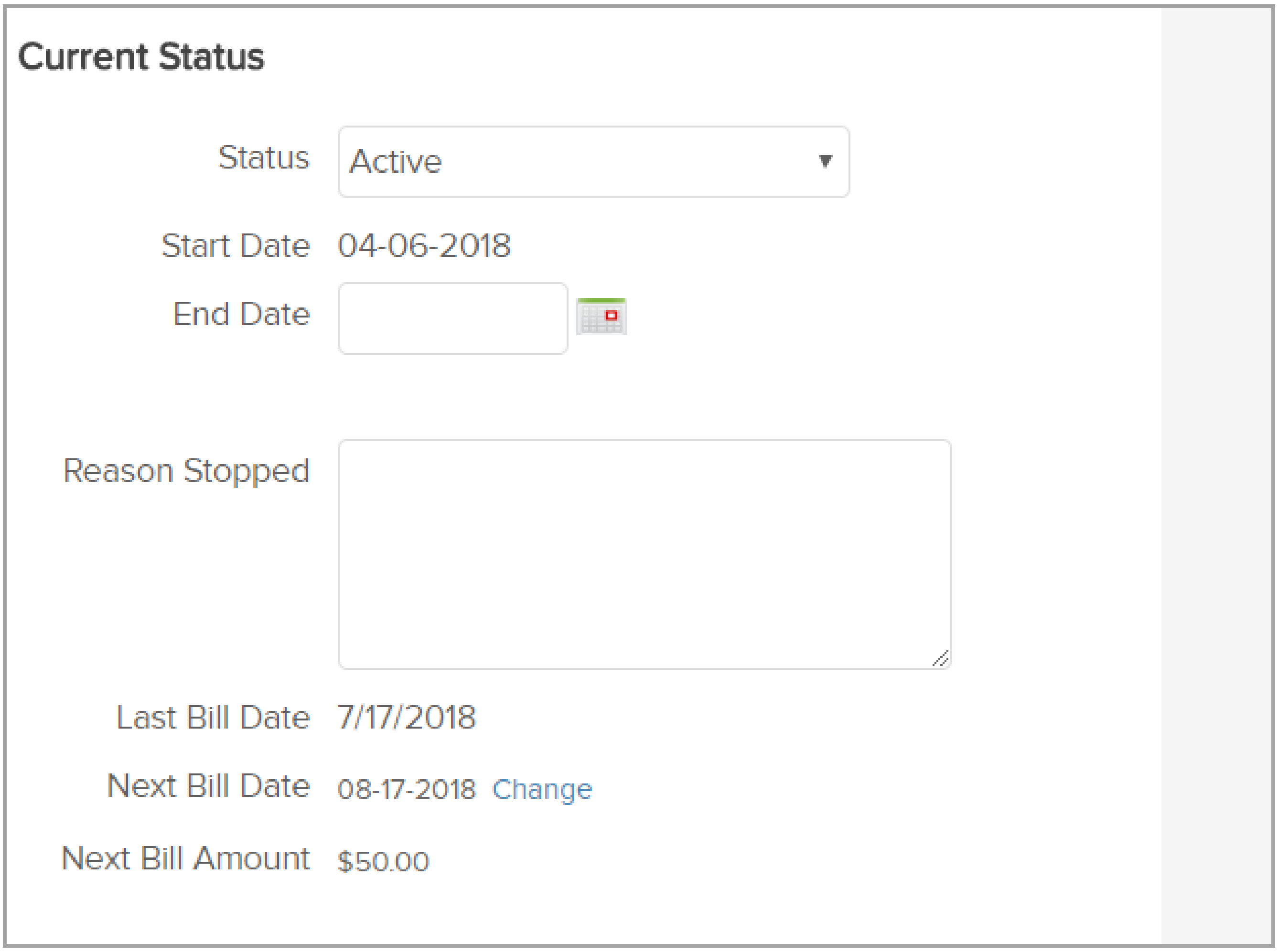
Sales Referral Partner (Optional): Name of Referral partner to receive credit if applicable.

Promo Code (Optional): Save any promo code used for a discount

Order Type (Optional): The type of order either Online or Offline

Invoice Template (Optional): Select a Legacy Template that is generated

Current Status



Status - Indicates if the Subscription Record is Active or Inactive . Subscriptions records will always be in an Active Status and can only be manually changed to Inactive.   Once saved in the Inactive status no further invoices will be created or charged.

Start Date - Date the Subscription was created

End Date - Date the Subscription stops billing. The End date is configured when there is a # of Cycles in the Subscription. Once the Subscription reaches the **End Date** no further invoices will be generated or charged but the Subscription Status will remain Active.

Reason Stopped (Optional) - Leave a note explaining why the Subscription was canceled. If the Subscription was created with a specific amount of Cycles it will automatically have "**Subscription ends on the above date based upon the number of cycles set. You may choose a different date as needed.**" saved in this field.

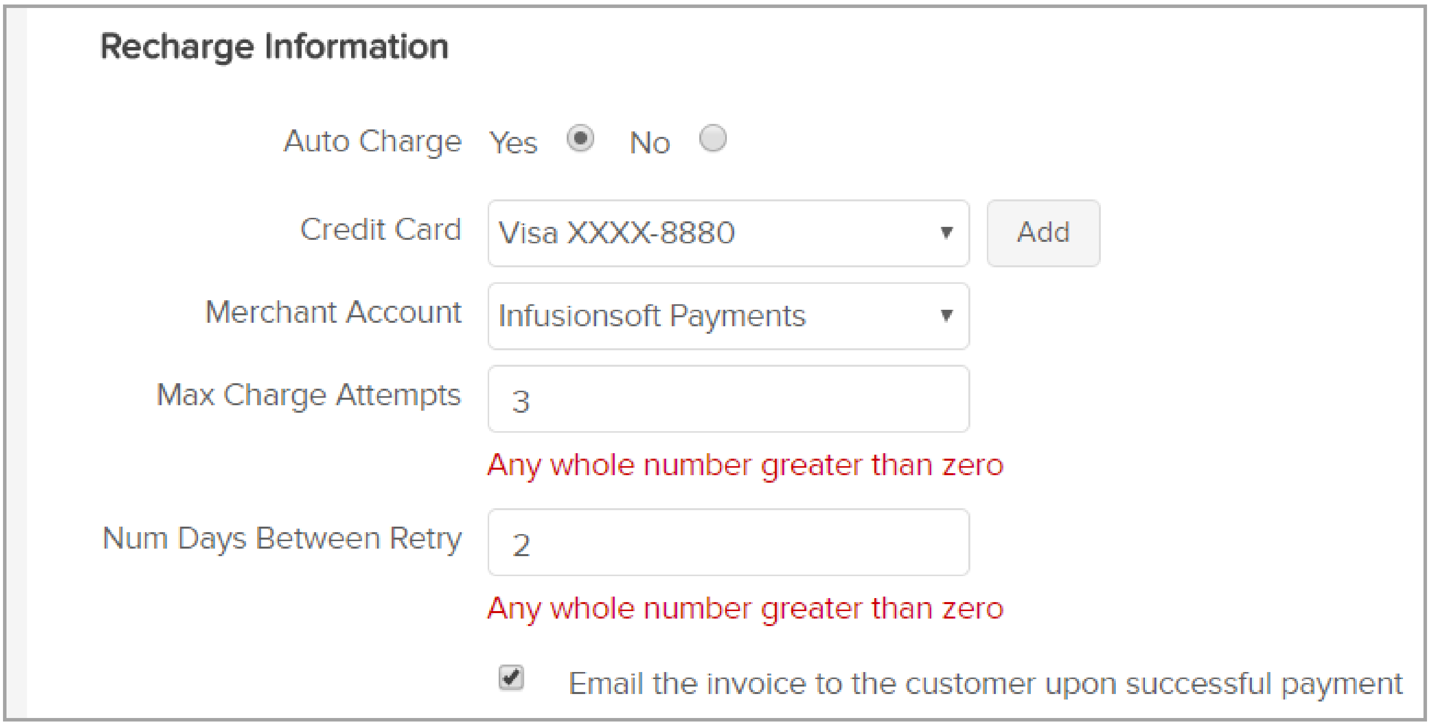
Last Bill Date - Date that the last Invoice was created

Next Bill Date - Date the next Invoice will be generated

Change - Change the Next Bill Date. This will only allow you to change the Next Bill date within a specific time frame.

Next Bill Amount - Amount that will be due on next Invoice. This will not accumulate if previous invoices were missed.

Recharge Information



Auto Charge - Indicates if the Credit Cards will be Automatically charged. If the Auto Charge is set to No but the Subscription is in the Active Status and no End Date is listed, then an invoice will be generated but will have a balance due.

Credit Card - Credit Card that the Subscription will bill

Add - Click "Add" to add another credit card to the Subscription record

Merchant Account - The merchant that processes the credit card payment

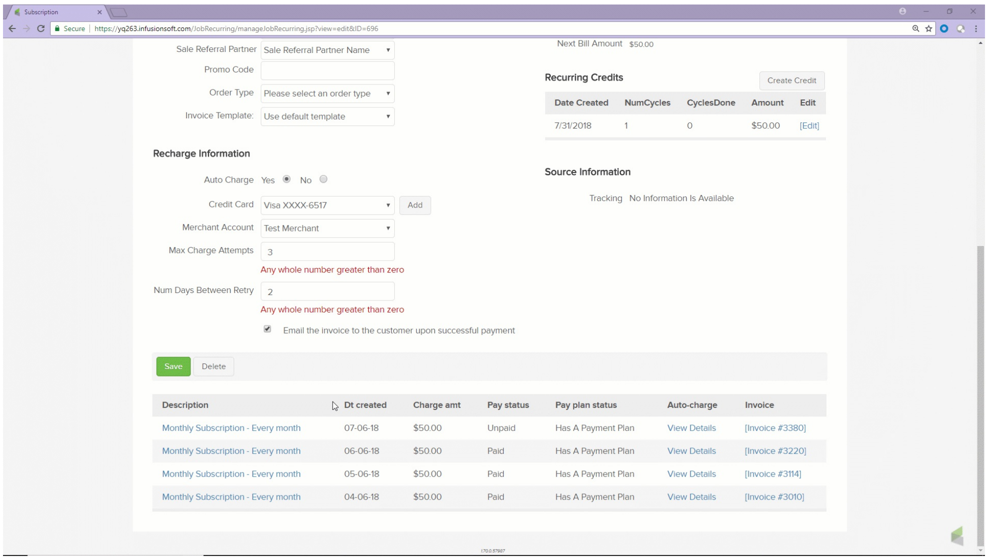
Max Charge Attempts - Amount of times the card will be attempted after the initial payment fails

Num Days Between Retry - The amount of days between bill attempts after the initial payment fails

Email the invoice to the customer upon successful payment - If checked an email with the invoice will be sent each Successful Payment

New Credit Card

- Click Add > Enter new card information
- Then click the outstanding Order Record or Invoice
- Click Payment Plan on the right
- Select the new card from the drop down
- Click Save



If the max attempts have been reached you will need Click "Reset Failed Attempts"

Unless you have E-commerce > Settings > Orders > "Reset Failed Auto Charge Attempt Counters When Credit Card Changes:" set to **Yes**.

If the max attempts have **NOT** been reached and the following is true then the payment will automatically run.

- The Auto Charge is marked Yes
- The outstanding invoices are within the time frame indicated under E-Commerce > Settings > Orders > Don't auto charge invoices that have x months been outstanding. Click here to see more information .

*This is not immediately but it will automatically process payment

Updated Card

If the Credit Card is updated all Invoices attached to that Credit card with outstanding balances will automatically process unless the Auto Pay is marked No and/or the max attempts have been reached.

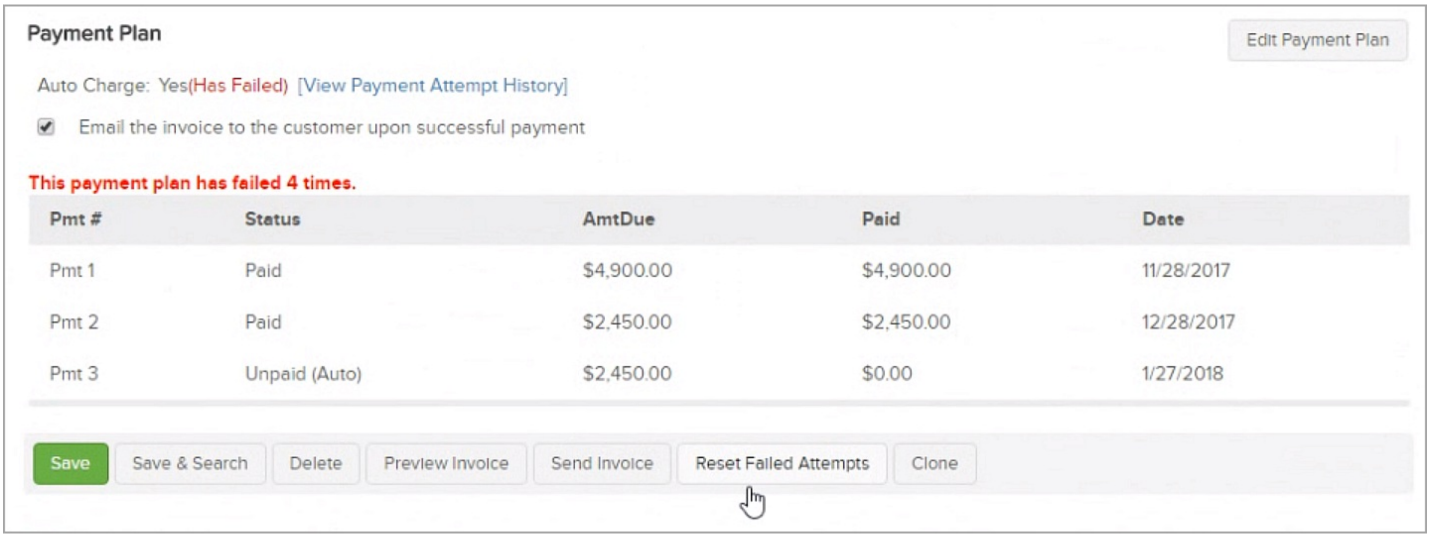
If the max attempts have been reached you will need to go into the **Invoice** > Click "Reset Failed Attempts"

If the max attempts have **NOT** been reached and the following is true then the payment will automatically run.

- The Auto Charge is marked Yes
- The outstanding invoices are within the time frame indicated under E-Commerce > Settings > Orders > Don't auto charge invoices that have x months been outstanding. Click here to see more information .

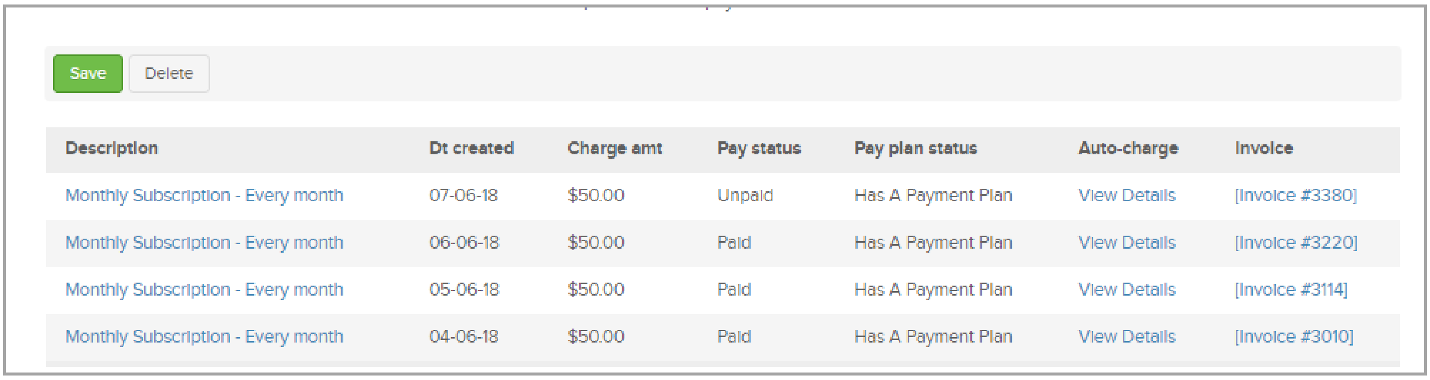
*This is not immediately but it will automatically process payment

Reset Failed Attempts



Past Subscription Invoices

Located at the bottom of the Subscription Record



Save Delete

Description	Dt created	Charge amt	Pay status	Pay plan status	Auto-charge	Invoice
Monthly Subscription - Every month	07-06-18	$50.00	Unpaid	Has A Payment Plan	View Details	[Invoice #3380]
Monthly Subscription - Every month	06-06-18	$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3220]
Monthly Subscription - Every month	05-06-18	$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3114]
Monthly Subscription - Every month	04-06-18	$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3010]

Description - The subscription product and cycle > When clicked it will open the full Order Record which includes the Contact Information, Order Information, Shipping, Source Information, Order Items, Payments, Commissions, Total Commissions, Payment Plan, save button, delete button, preview invoice, send invoice, clone, and reset failed attempts when applicable.

Dt Created - Date the invoice was generated

Charge amt - Amount Billed

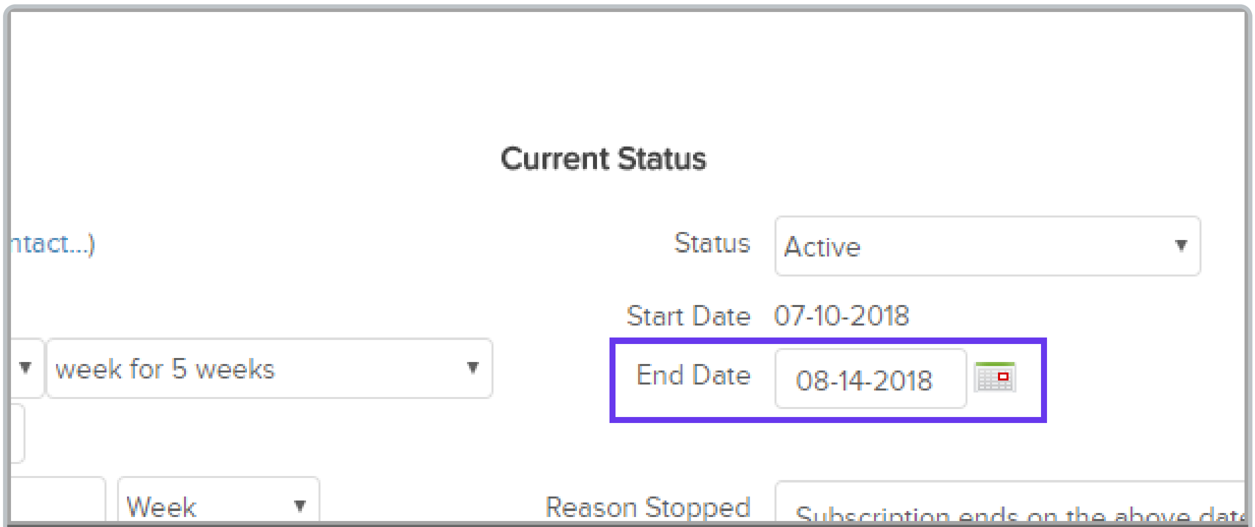
Pay status - Indicates if the invoice is paid or Unpaid

Pay plan status - Indicates if a Payment plan is used

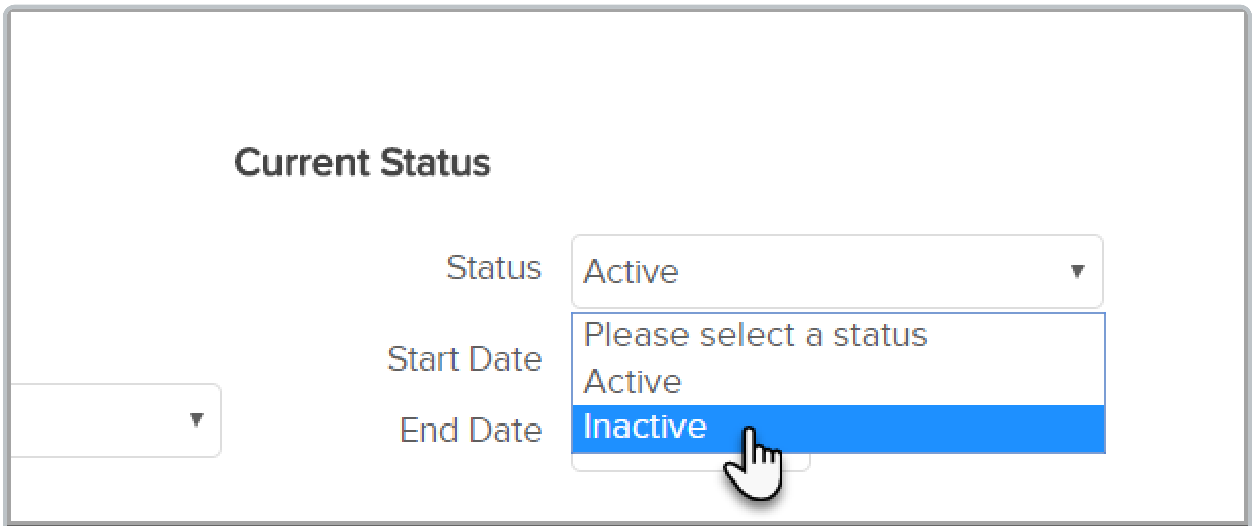
Auto-charge - View Details will show the "Credit Card Charge Attempt History"

Invoice - Contains payments, Commissions, Payment Plan, Preview Invoice button, Send Invoice button

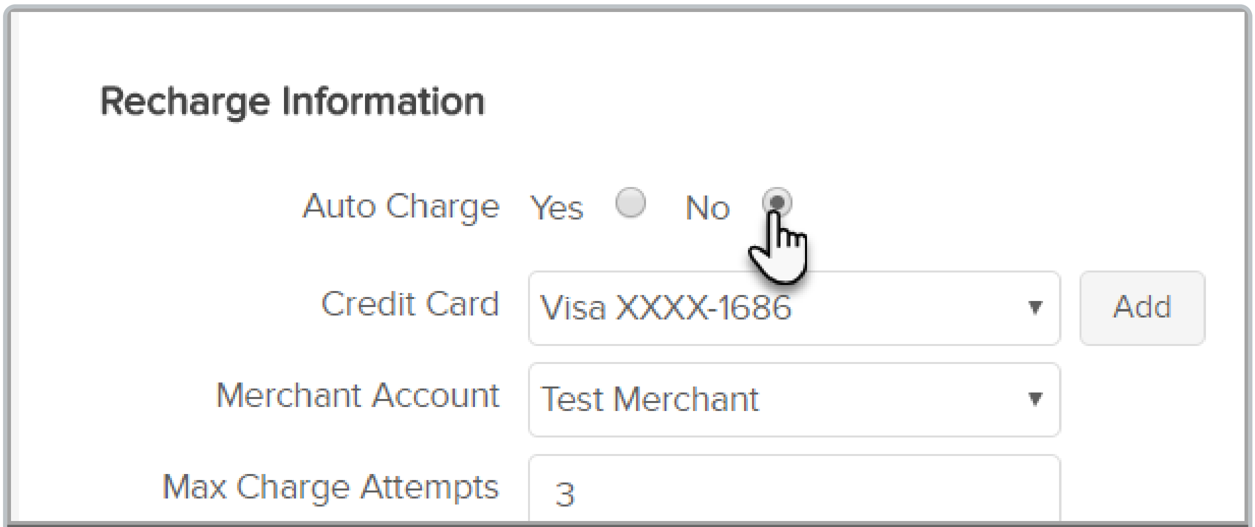
How to Cancel a Subscription



If you need to cancel a Subscription on a Specific date, enter that date in the "End Date" field and click "Save".

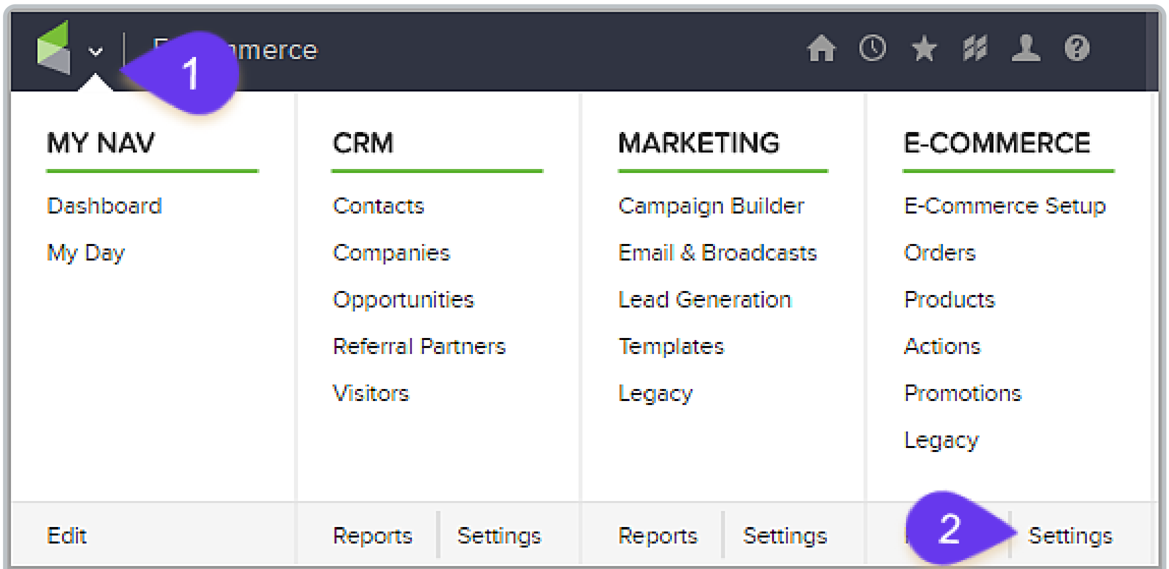


If you need to cancel a Subscription immediately do so by changing the Status to "Inactive" and click "Save"



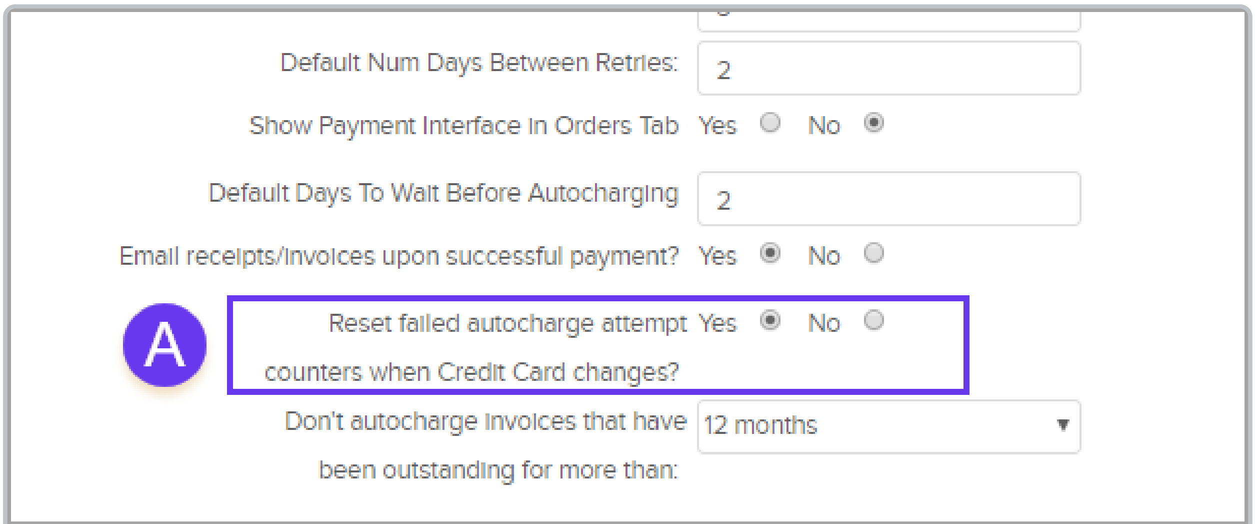
Pro Tip! Change the Auto-Pay to "No" to prevent any accidental billing if the Subscription is re-activated.

Auto Charge Settings

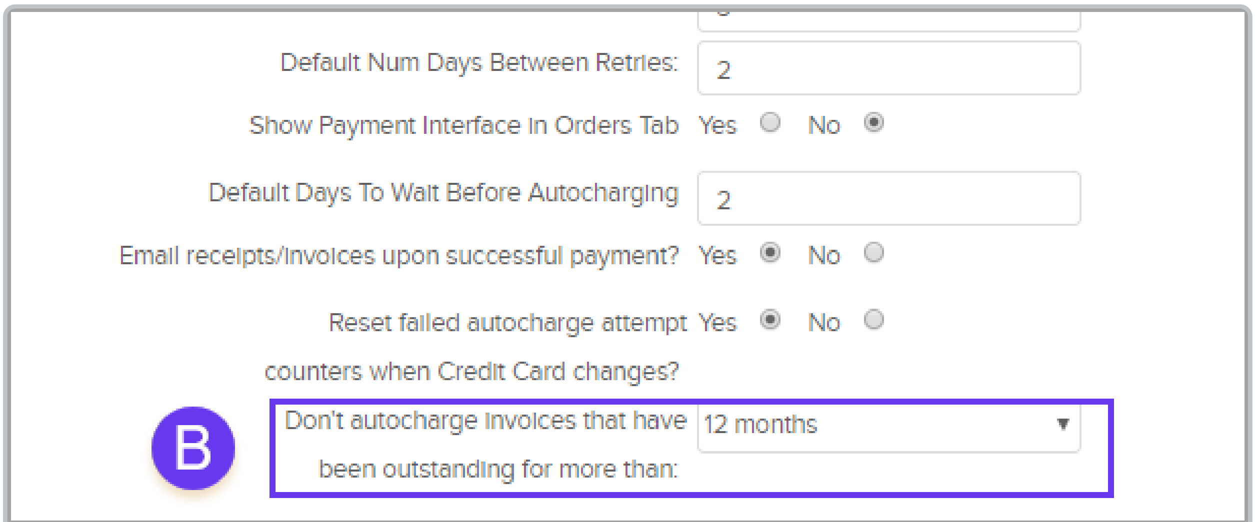


Go to E-Commerce > Settings

Click Orders from the left and scroll down



Select "Yes" to have the failed autocharge reset when a New Credit Card is added



Select the time frame for Outstanding invoices

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Create A Manual Order

Last Modified on 08/01/2018 3:33 pm MST

1. While viewing a contact record, click on the **Order** tab.

2. Click on the **Add Order** button.

3. Go to the *Order Information* section.
   - (Optional) **Order Title**: By default, this field is populated with order date. but you can edit it. The title is displayed in the person's order history as a hyperlink to access the order details.
   - (Optional) **Order Date**: By default, this field is populated with the current date, but you can edit it.
     Order Type: Select offline from the drop-down.
   - (Optional) **Order Notes**: Add order-specific notes if needed. These notes are only visible to your Infusionsoft users.
   - (Optional) **Lead / Sale Referral Partner**: Type in the name of a referral partner to credit their partner commissions for this sale. This field is automatically populated if a referral partner is already associated with the customer's contact record.
   - (Optional) **Invoice Template**: Select a custom invoice template from the drop-

down.
  - (Optional) **Promo Codes**: Click on the Edit Promo Codes link to select a promo code for the order. The promo code can be used to track ad effectiveness. It does not automatically apply a discount.

4. Click the **Save** button.

5. Click on the **Add Order Item** button to enter the first product for this order. Each product is added separately.
   - **Product ID**: Enter a product name to search for a product in your database. Infusionsoft will display a list of possible matches. Click on a product to select it.
   - **Type**: Select a type from the drop-down.
   - **Item Name**: This defaults to the product name, but you can edit it. This name is displayed on the order invoice.
   - **Item Description**: This defaults to the product's short description, but you can edit it. The description is also displayed on the order invoice.
   - (Optional) **Charge Inventory**: This defaults to Yes, meaning Infusionsoft will deduct this item from the inventory entered in the product record. This setting only applies if you are using Infusionsoft to track inventory levels and receive low inventory alerts.
   - **Qty**: The default quantity is 1. Change this number if the customer is buying more than one of an item.
   - **Price/Unit**: This defaults to the regular product price, but you can edit it to change the price of the product. This may be needed if you offer variable pricing.
   - (Optional) **Cost/Unit**: This defaults to the cost recorded in the product record, but you can edit it. This is your cost for creating and delivering the product.
   - (Optional) **Notes**: Add product-specific notes here. These notes are only visible to Infusionsoft users.

6. **Save** the first item. Repeat this process to add more items to the order.

7. **Save** the order. It has been created as an unpaid order.

8. Click on the **Preview Invoice** button to view the order invoice and send it to the customer.

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Add A Payment To An Existing Order

Last Modified on 08/01/2018 3:33 pm MST

When someone pays you offline, you may need to manually record and /or process a payment for an existing order. You can do this in one of two ways: By navigating to the contact record first and making a payment, or using the Enter a Payment feature.

To record a payment from the contact record...

1. While viewing the contact record, click on the **Order** tab
2. Click the **Add Payment** button
3. Choose the invoice to pay. *Note: Only invoices with a balance due will appear in the drop-down.*
4. Enter the payment details
    1. **Amount**: Enter the payment amount. This can be a partial payment or the total balance due.
    2. **Date**: Enter the payment date (usually today's date.)

    3. **Payment Type**: Select a payment type from the drop-down. Note: Select credit card (charge now) to process the credit card payment through Infusionsoft when you record the payment.
    4. (Optional) Enter **Notes** about this payment.
    5. (Optional) **Apply to Commissions**: This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partners are not eligible for commissions on this order.
5. Click the **Apply Payment** button to save the payment and apply it to the invoice.

To record a payment using the Enter a Payment feature...

1. Go to **E-Commerce** > **Orders**
2. Hover over *Orders* and click on **Enter a Payment**.
3. Enter the name of the contact and click **OK**.
4. Choose the invoice to pay. *Note: Only invoices with a balance due will appear in the drop-down.*
5. Enter the payment details.
    1. **Amount**: Enter the payment amount. This can be a partial payment or the total balance due.
    2. **Date**: Enter the payment date (usually today's date.)
    3. **Payment Type**: Select a payment type from the drop-down. Note: Select credit card (charge now) to process the credit card payment through Infusionsoft when you record the payment.
    4. (Optional) Enter **Notes** about this payment.
    5. (Optional) **Apply to Commissions**: This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partners are not eligible for commissions on this order.
6. Click the **Apply Payment** button to save the payment and apply it to the invoice.

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Manually Create An Order For A Subscription

Last Modified on 08/01/2018 3:34 pm MST

Before you can create a manual order, you must create a contact record for the customer. After you create a contact record, there are two ways you can enter the person's order: you can add the order from the main navigation menu, or from the order tab in the 2nd row of tabs in the contact record.

Note: These instructions apply to subscription orders. You will need to create a separate order for any products.

1. While viewing the contact record, click on the **Order** tab.

2. Click on the **Add Subscription** button.

3. Go to the *Subscription Setup* section.
    - **Program**: Select a subscription program from the dropdown.
    - **Qty**: The default quantity is one. Change this number if the customer wants to purchase more than one of the same program.
    - (Optional) **Billing Cycle**: This defaults to the billing cycle you defined when you set up the subscription program, but you can change it.
    - (Optional) **Billing Amt**: This defaults to the price you defined when you set up the subscription program, but you can change it.
    - (Optional) **Charge Tax**: This defaults to the tax setting in the subscription program record. If the default is Yes, you can change it to No to override the default.
    - (Optional) **Lead / Sale Referral Partner**: Type in the name of a referral partner to credit their referral partner commissions for this sale.
    - **Order Type**: Select offline from the dropdown.
    - (Optional) **Invoice Template**: Select a custom invoice template from the drop-down.

4. Go to the *Recharge Information* section.
    - **Auto Charge**: The default auto charge setting is *Yes*. This means the system will

charge each recurring fee automatically, based on the billing cycle you defined. Set this to *No* if you want to manually charge and record each payment.
    - **Credit Card 1**: Select an existing credit card from the drop-down, or click on the **Add** button to enter a new one. This is the primary credit card.
    - (Optional) **Credit Card 2**: Select an existing credit card from the drop-down, or click on the **Add** button to enter a new one. *Note: This is a backup credit card. It will be billed if Credit Card 1 fails.*
    - **Merchant Account**: Select a Merchant Account from the dropdown.
    - (Optional) **Max Charge Attempts**: This number is the maximum number of times the system will try to run a charge if the first attempt fails. The default you defined under **E-Commerce** > **Settings** > **Orders** is displayed, but you can change it.
    - (Optional) **Num Days Between Retry**: This is the number of days the system will wait before trying to run a charge again, when the previous attempt fails. The default you defined under **E-Commerce** > **Settings** > **Orders** is displayed, but you can change it.
    - (Optional) **Email Invoice to customer upon successful payment**: When this checkbox is marked, the customer will receive an email notification for each successful recurring subscription charge. The default invoice you defined under **E-Commerce** > **Settings** > **Orders** is displayed, but you can change it.

5. Go to the *Current Status* section.
    - (Optional) **Status**: This defaults to active, which means the customer will get charged. You would only select Inactive to cancel a subscription and stop the automatic billing.
    - (Optional) **Start Date**: This defaults to the current date. You can change this date to represent the true start date.
    - **First Bill Date**: Enter the date for the first subscription charge. Enter the current date to charge it immediately or enter a future date to delay billing (i.e. free trial, arrears billing.)
    - (Optional) **End Date**: Enter an end date if this is a micro-continuity program that has a limited duration (like 6 months). Leave this blank if the customer remains in the program until asking to cancel.
    - **Reason Stopped**: This field is only relevant when canceling a subscription. Leave it blank when you create a new one.

6. Click the **Save** button to create the subscription. Saving generates the last bill date, next bill date, and next bill amount.

7. Click on the **Invoice** button to generate the first charge. This will initiate one of the following scenarios:
    - **If Auto Charge is set to Yes and Email Invoice is checked**: The customer's credit

card is billed and the system will automatically email the customer a paid invoice.

- **If Auto Charge is set to Yes and Email Invoice is unchecked**: The customer's credit card is billed, but you must click on the Invoice link to manually generate / send an invoice to the customer.
- **If Auto Charge is set to No and Email Invoice is unchecked**: You must click on the **Invoice** link to manually enter the payment and generate / send an invoice to the customer.
- **If Auto Charge is set to No and Email Invoice is checked**: You must click on the **Invoice** link to manually enter the payment. When the payment is recorded, the system will automatically send an invoice to the customer.

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Create A Quick Sale Order

Last Modified on 08/01/2018 3:35 pm MST

Once you understand the manual order process, you may want to use the quick sale option to quickly create a single-item order for a one time only product (no subscriptions.)

This option gives you control over the following:

- Adjusting the product price
- Payment Option: No Payment, Auto Charge, Manual Payment (e.g. check)
- Payment Plan: Create a custom payment plan for the order
- Shipping: This method uses the order form shipping groups
- Applying referral partner commissions
- Actions: Quick sales do NOT trigger purchase actions. You will be able to select an action set to run.

1. While viewing a contact record, click on the **Order** tab.

2. Select a product from the quick sale drop-down.

3. Enter Sale Details:
    - (Optional) **Adjustment**: Use this field to adjust the product price based on your agreement with the customer.
    - (Optional) **Sale Notes**: Add order specific notes to maintain a record of any non-standard order requests or the reason for the price adjustment.
    - (Optional) **Promo Code**: Select a promo code from the dropdown. These promo codes are used to track advertising effectiveness. They do not apply a discount.
    - (Optional) **Order Type**: The order type is set to offline by default. You should not need to change this for a manual order.
    - **Charge Sales Tax**: The default setting is *Yes* or *No* based on the choice you defined under **E-Commerce** > **Settings** > **Orders**. Select *Yes* to apply sales tax. Select *No* to exclude sales tax from the order.

4. Enter Payment & Auto-charge Details
    - Choose a Payment Option from the following:
        - **I don't want to record a payment at this time**
        - **Pay with Credit Card**: Select an existing card or Add a new one to charge the

credit card when you complete the order.
        - **Make a Manual Payment**: Choose a Payment Type from the dropdown that is not Credit Card (Charge Now). You will use this option to record cash, check, and credit card payments processed outside of Infusionsoft. No payment processing will take place when a manual payment type is selected, as this is only recording payment in the order.
    - Enter the **Payment Amount**. This amount will be applied to the order total and, if the customer is paying with a credit card, charged automatically when you complete the order.
    - (Optional) Add a **Note** about the payment.
    - (Optional) **Apply to Commissions**: This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partner are not eligible for commissions on this order.

5. (Optional) Enter Payment Plan Details. You only need to use these settings if the customer is going to pay for the purchase in multiple installments.
    - **Initial Payment Amount**: This amount generally includes up front fees, shipping, and taxes.
    - **Initial Payment Date**: Enter the payment date (usually today's date.)
    - **Plan Start Date**: Enter the date for the first charge of the remaining installments.
    - **# Payments**: Enter the number of remaining payments, excluding the initial payment amount you've already recorded (e.g. For a total sale of $1200, the customer might pay an initial payment of $500. The remaining $700 may be broken into 2 payments of $350 each.)
    - **Days Between Payments**: Enter the number of days to wait between the remaining payments. This defaults to 30 days, but you can change it.

6. (Optional) If this is a shippable product, enter **Shipping**
    - **Shipping Group**: Select an existing group from the dropdown or click on Create to add a new shipping group.
    - **Shipping Option**: Select a Shipping Option from the choices assigned to the Shipping Group you selected.

7. (Optional) Assign Commissions
   Select the Lead and / or Sale Referral Partner who are eligible for commissions on this order.

8. (Optional) Apply Actions
   Select an action set from the dropdown. *A quick sale does not trigger purchase actions or order form actions. You must manually select an action set.*

9. Click the **Save** button to complete the order.
   Note: If the customer is paying by credit card, the charge will be applied when the order is saved or auto-charged in the future on the initial payment date.

Add A Payment Plan To A Manual Order

Last Modified on 08/01/2018 3:35 pm MST

After an order is created a payment plan can be added or altered. The payment plan allows a customer to pay for a purchase in one or several installments. Infusionsoft will automatically charge the card on file as long as a merchant account is set up.

1. While viewing a contact record, click the **Order** tab.

2. Click on the name of the order to open it.

3. Go to the *Payment Plan* section and click on the **Edit Payment Plan** button.

4. Enter the Auto Charge Settings
    - **Auto Charge**: Set this to 'Yes' if the credit card should automatically be charged through a Merchant Account.
    - **Credit Card**: Select a credit card from the drop down or click on the Add button to enter a new Credit Card. The system will attempt to charge the credit card on file when the next batch of charge attempts processes (Could take up to 6 hours).
    - **Max Charge Attempts**: Enter the maximum number of times the system should try to auto-charge a credit card.
    - **Num Days Between Retry:** Enter the number of days the system should wait between auto-charge attempts.

5. Enter the Payment Plan Details
    - **Initial Payment Amount**: This amount generally includes up front fees, shipping, and taxes.
    - **Initial Payment Date**: Enter the payment date (usually today's date, but can be set to a future date.)
    - **Plan Start Date:** Enter the date for the first charge of the remaining installments after the initial payment. If the Plan Start Date and Initial Payment Date are the same then the first payment will include the Initial Payment Amount and the first payment amount. (Example: For a total sale of $1200, the customer might pay an initial payment of $500. The remaining $700 may be broken into 2 payments of $350 each. The first payment would be $850 if the Plan Start Date and Payment Date is the same.)

- **# Payments**: Enter the number of remaining payments, excluding the initial payment amount entered already (Example: For a total sale of $1200, the customer might pay an initial payment of $500. The remaining $700 may be broken into 2 payments of $350 each.)
- **Days Between Payments**: Enter the number of days to wait between the remaining payments. This defaults to 30 days, but can be changed.

6. Click the **Save** button to save the payment plan.
   Note: A charge that should be taken on the day the payment plan is setup can take up to 6 hours before attempting to charge automatically.

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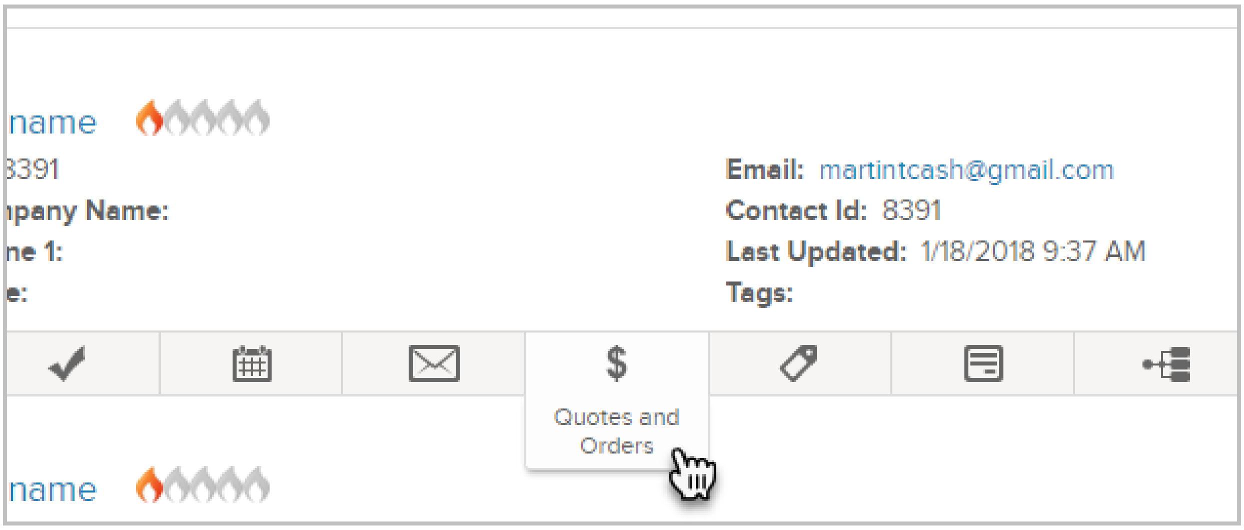
Create A Quote

Last Modified on 08/01/2018 3:36 pm MST

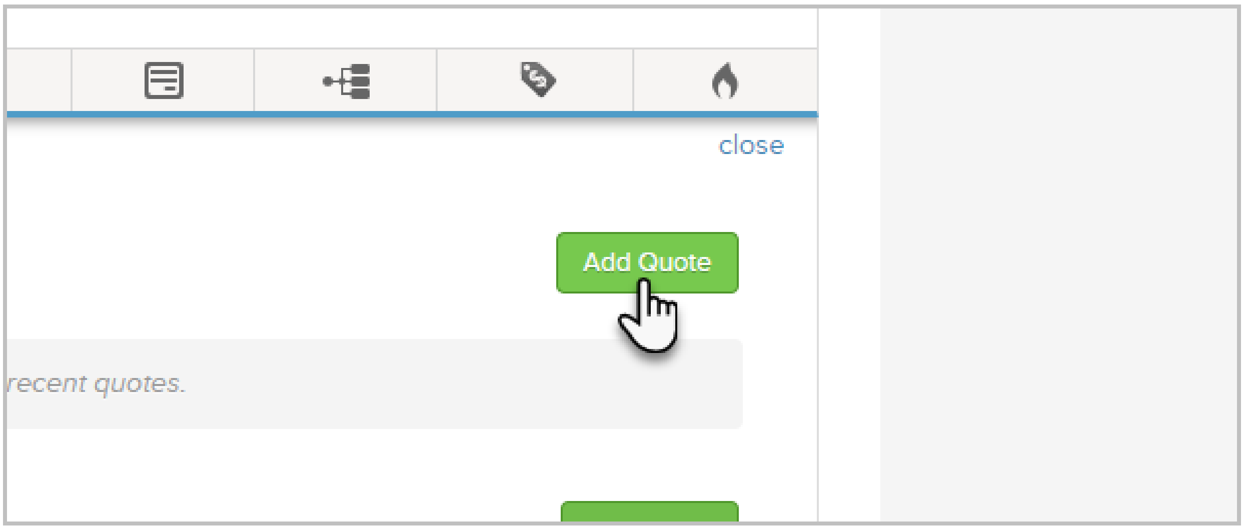
The quoting tool makes it easy to create, manage and share quotes and proposals with potential buyers directly from a contact search. To take payments online, check out the Infusionsoft Payments Setup Guide .

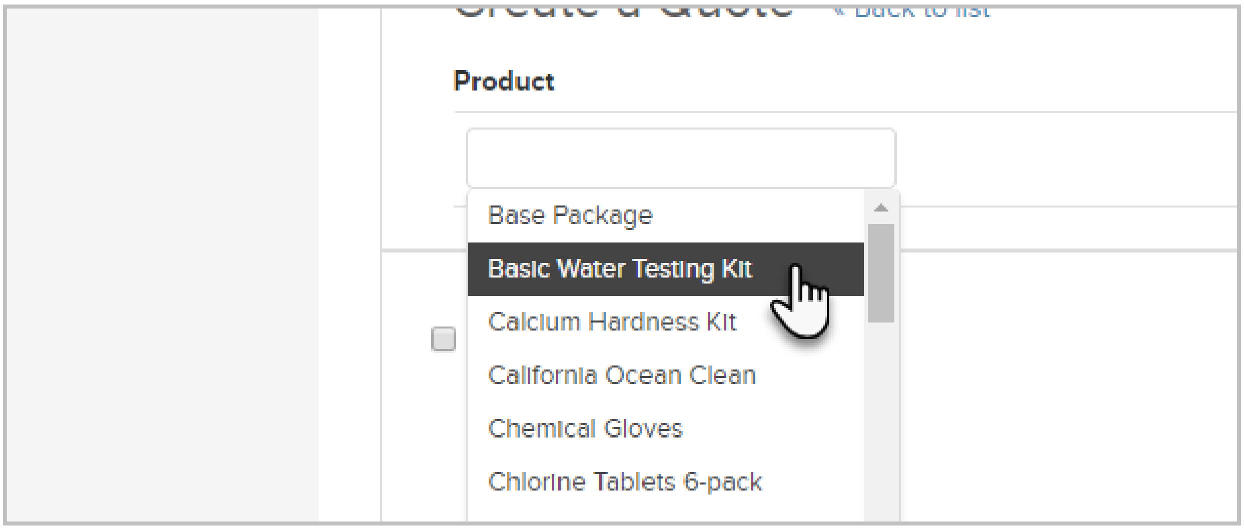
Creating Quotes

You can access quoting tools from My Day and Interactive List View by clicking the **$** icon within the task tool bar.



1. To create a new quote, click **add quote** and use the auto-complete box to search for and add products and/or subscriptions to the quote. Once a product is selected, you can edit the description, quantity and price. Subscriptions can be edited to include a free trial period.



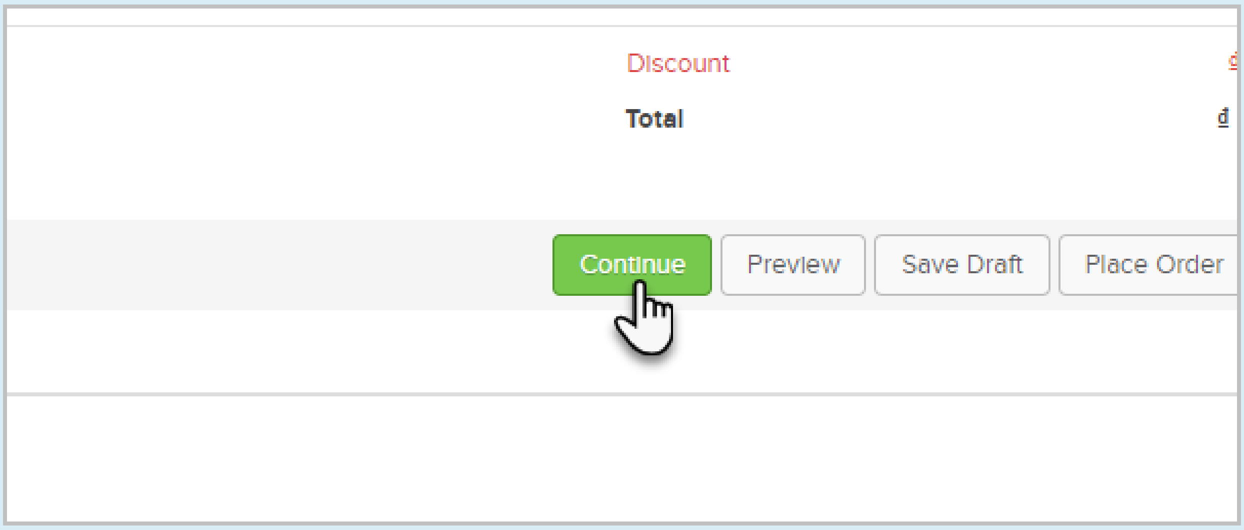


2. You can apply a percentage discount or flat rate price reduction to any quote by clicking

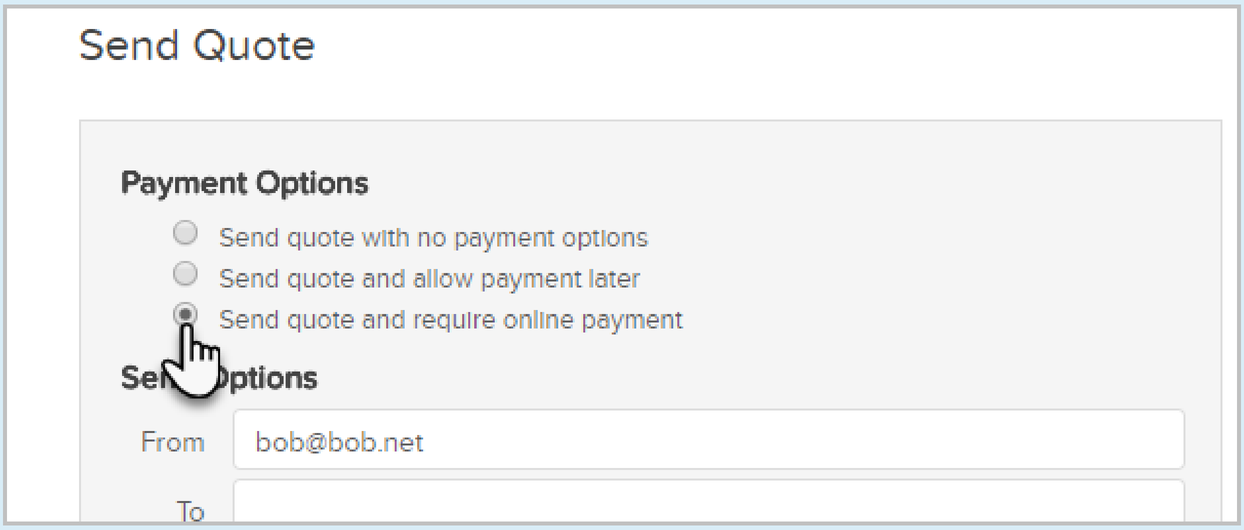
the red discount field. If a product qualifies for shipping, you can click the Shipping link to select a preconfigured shipping option. If no shipping options exist, a pop-up will direct you to the e-commerce setup page.

3. When taxable products are added to a quote, tax will be automatically calculated and applied. If no tax tables are configured, a pop-up will direct you to the e-commerce setup page.

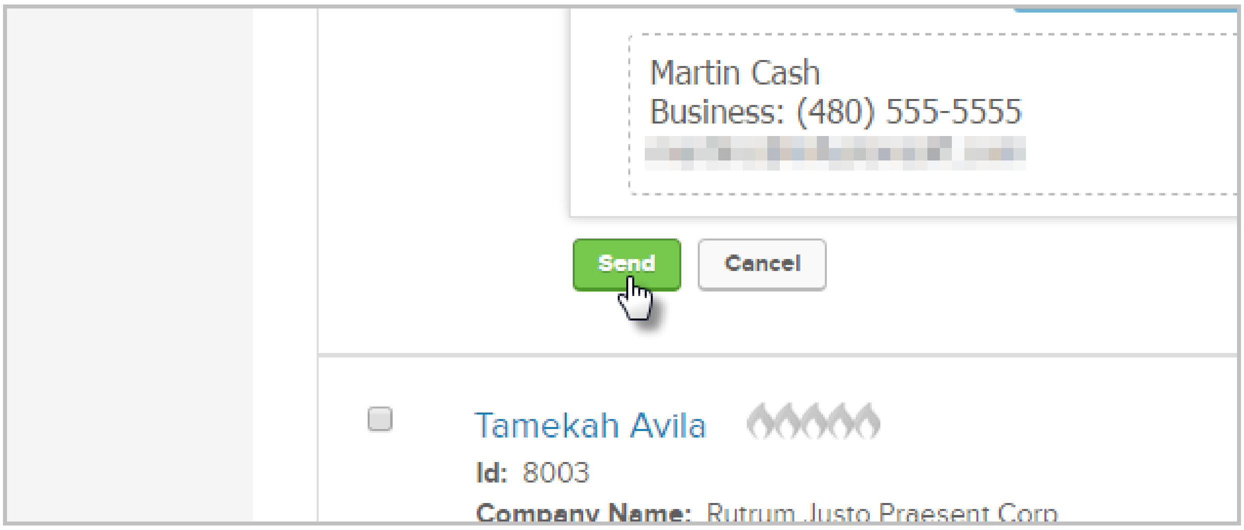
4. Click **Continue** and the quote template will pop-up allowing you to specify payment options (Send quote with no payment options, Send quote and allow payment later, or Send quote and require online payment.)



Important! Be sure to select the last radio option if you want to require the quote be paid online. If you don't have a merchant account, check out Infusionsoft Payments Setup Guide .



5. Once you've edited your quote template, click the **Send** button.



View & Share Quotes

You can preview a quote by clicking the **Preview** button, which will open a PDF quote. Clicking **Send Quote** will open an email dialog box with options to edit the recipient address, subject line and email body, which includes a company logo, your HTML signature and link to access the quote.

After clicking the link, a recipient is taken to a web page that contains a quote. The quote can be accepted or declined with the click of a button. If the recipient declines the quote, the page is refreshed, and the word “DECLINED” is stamped in red. If the quote is accepted, the customer will see the word “ACCEPTED” stamped in green. A notification email will automatically also be sent to the sales person.

Accepted quotes are automatically converted into orders, and a balance is created within Infusionsoft. Payments must be recorded manually. Any action taken on a quote will update the status, which include: draft, sent, viewed, accepted and declined. Once a quote is accepted, it cannot be changed.

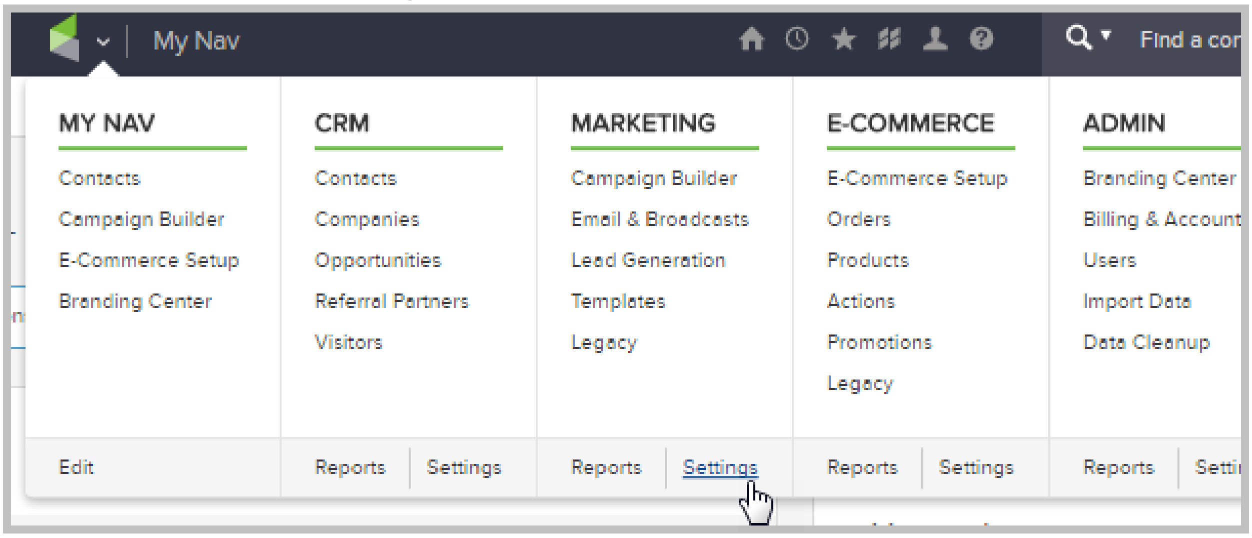
Every quote has a version history so you can track the negation history.

Add Product And Service Fulfillment Notes To Orders

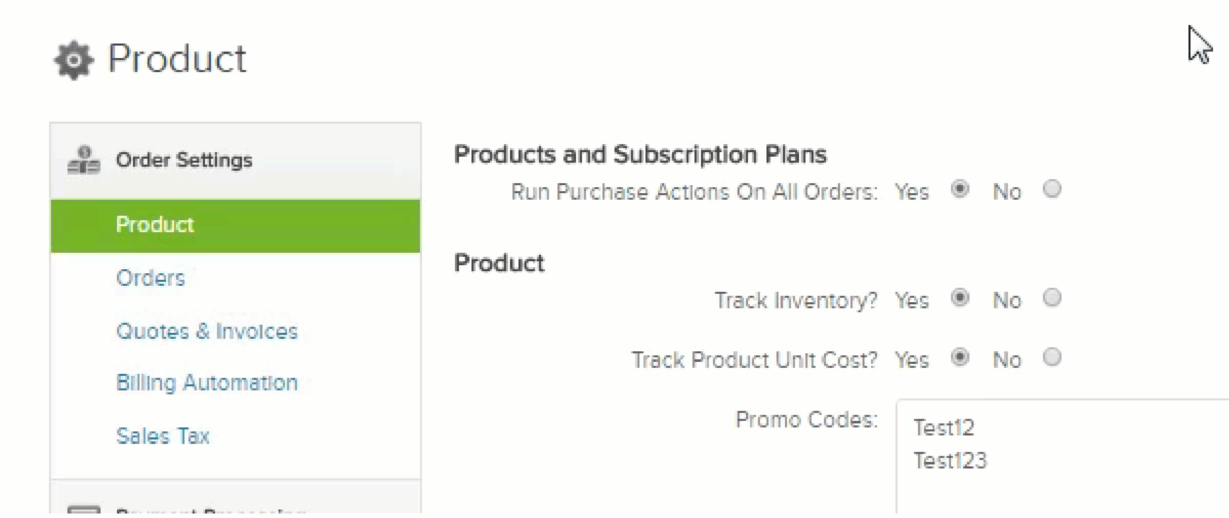
Last Modified on 08/01/2018 3:37 pm MST

Infusionsoft does not include automated order fulfillment tracking. However, you can manually track this information on individual orders. You can add shipping and service notes to each line-item of an order. These are internal notes that you can reference if a customer inquires about their order.

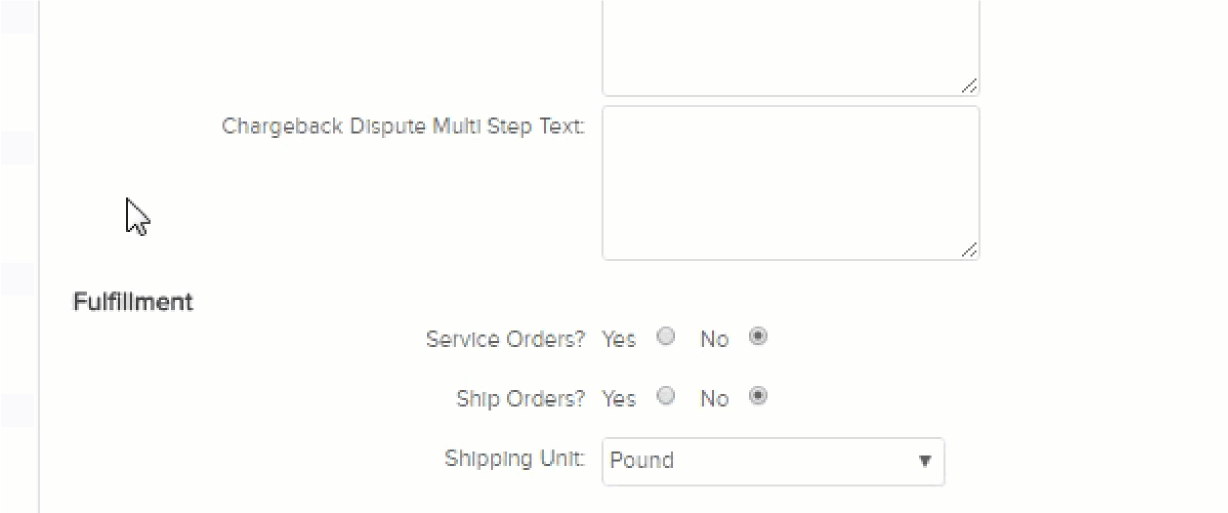
1. Go to **E-Commerce** > **Settings**



2. Click on **Orders** in the **Settings** menu



3. Scroll down to the **Fulfillment** section and enable **Service Orders** and/or **Ship Orders**



4. Now, when you click on an item in an order, you will have the ability to add notes concerning the order item

Add A New Credit Card To A Contact Record

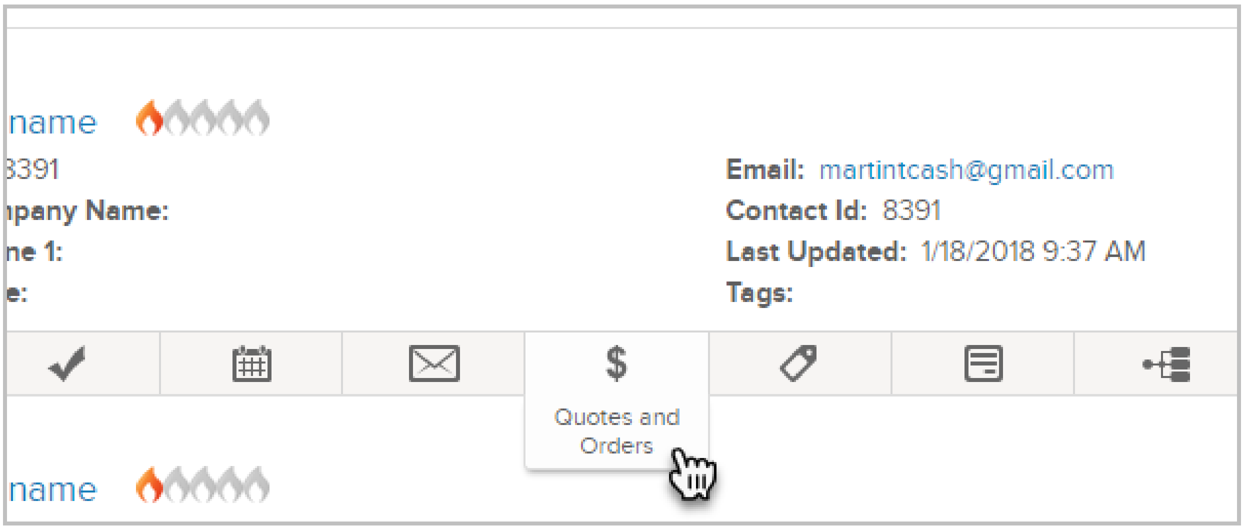
Last Modified on 08/01/2018 3:37 pm MST

When a customer responds to a billing issue related to a failed auto-charge for a payment plan or an expired credit card, you will need to:

- Add a new credit card
- Update the order or subscription to transition the billing to the new card

Note: If the credit card on file is expired, you can update the expiration date from the **Order** tab in a contact record. Click on the credit card link to change the expiration date and month.

1. While viewing the contact record, click on the **Order** tab.



2. Click on the name of an order to view it.

3. Click on the **Edit Payment Plan** button.

4. Go to the Auto-charge section and select the new credit card from the drop-downs or click on the **Add** button to enter a new credit card.

5. Click the **Save** button to save the payment plan and initiate any past due billing in one

of the following ways:

- If the card has not reached the maximum number of autocharge retries, the next autocharge attempt will run all current and past due charges
- If the maximum number of autocharge retries has been reached, you need to manually run the past due charges. All future charges will run automatically using the new card.

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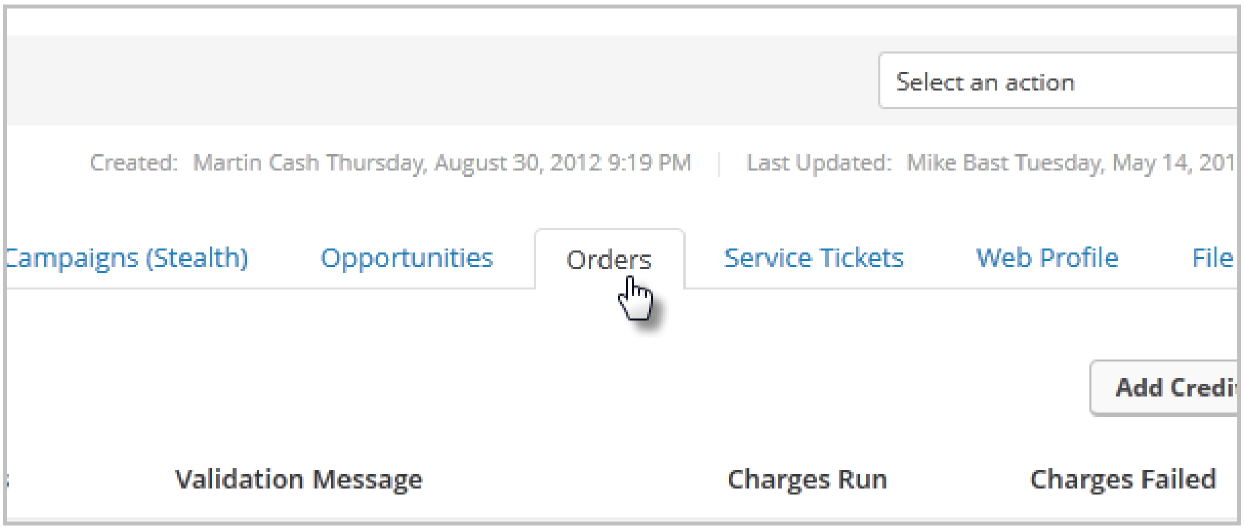
Update The Credit Card On A Subscription

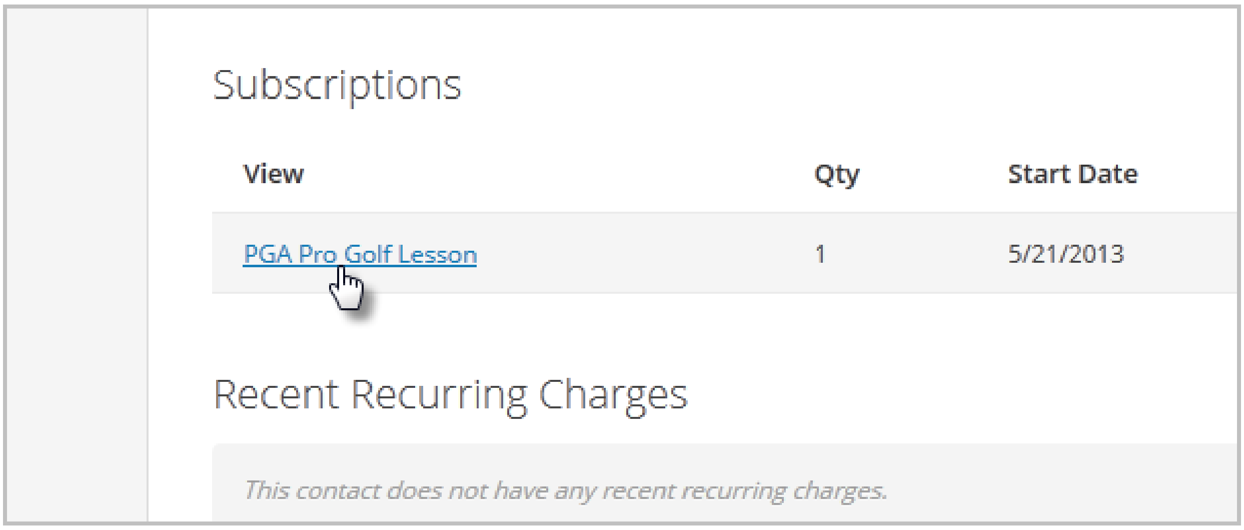
Last Modified on 08/01/2018 3:39 pm MST

1. Find the customer's contact record

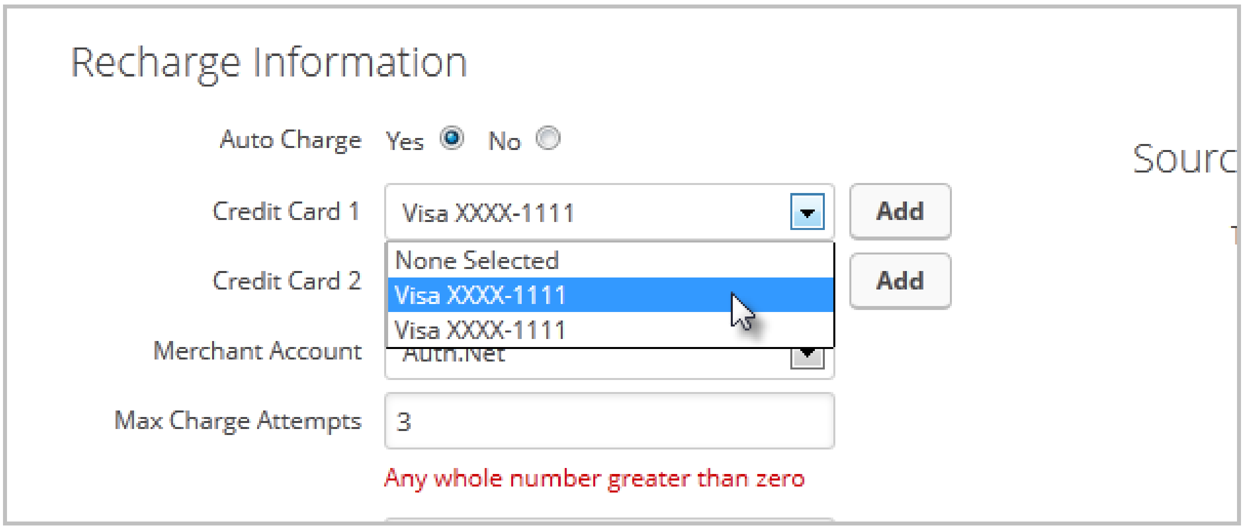
2. Go to the **Order** tab in the bottom row of tabs on the contact record



3. Click on the name of a subscription to open it



4. Go to the *Recharge Information* section and select the new credit card from the drop-downs or click on the **Add** button to enter a new credit card



5. Click **Save** to update the subscription. The past due billing will be handled in one of the following ways:
    - If the card has not reached the maximum number of autocharge retries, the next autocharge attempt will run all current and past due charge.
    - If the maximum number of auto-charge retries has been reached, you need to manually run the past due charges. All future charges will run automatically using the new card.

6. **Save** the updated subscription

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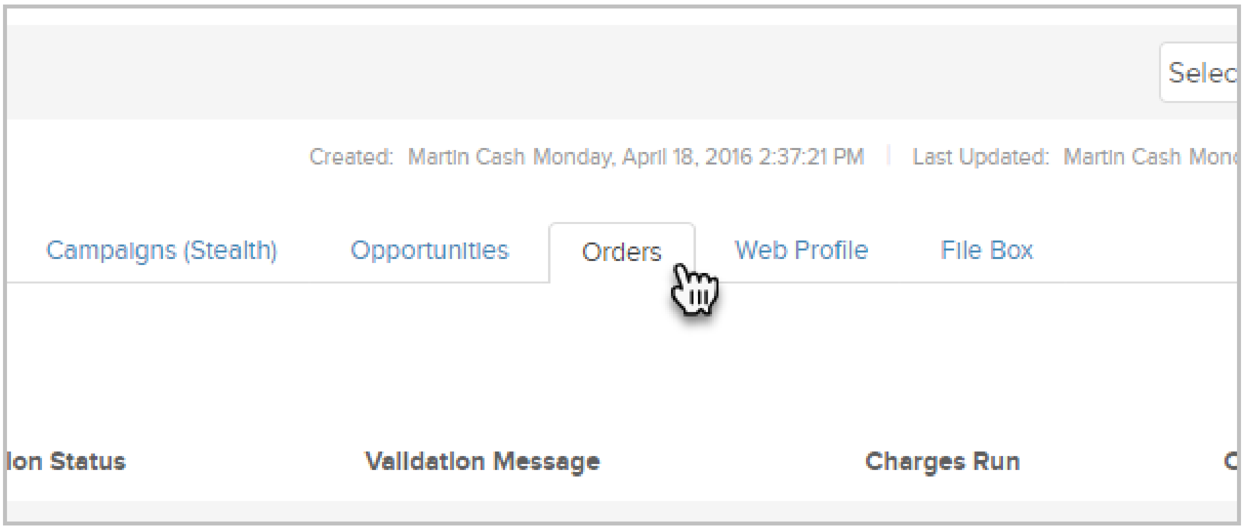
Update The Credit Card Expiration Date

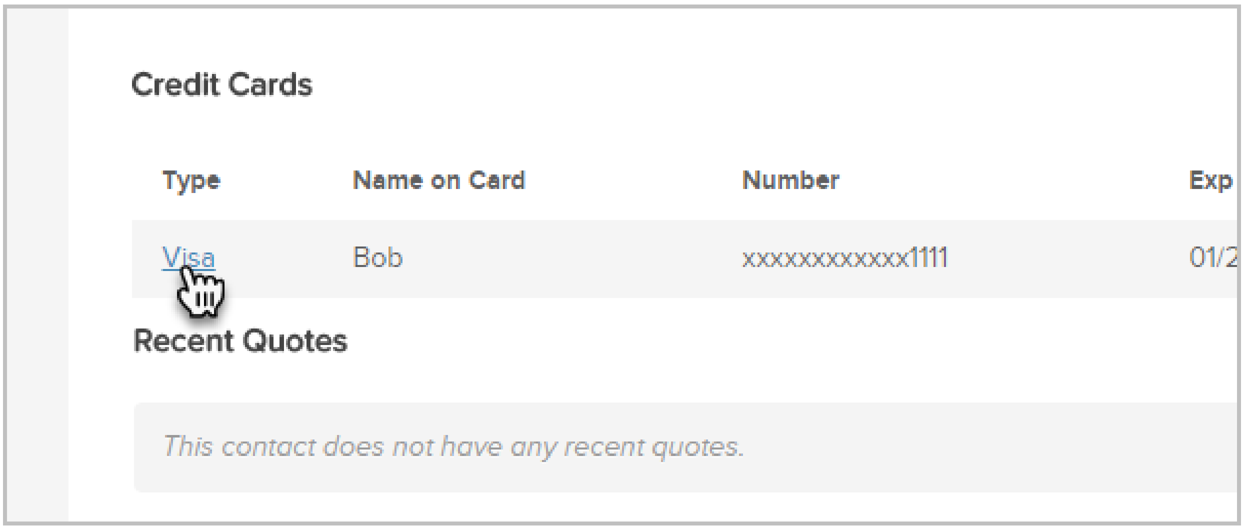
Last Modified on 08/01/2018 3:39 pm MST

When the expiration date for a customer's credit card needs updated, you can edit the card on file. You do not need to add a new credit card.

1. Open the contact record, and click on the **Order** tab.



2. Click on the credit card link.



3. Update the expiration date.

4. Click the **Save** button.

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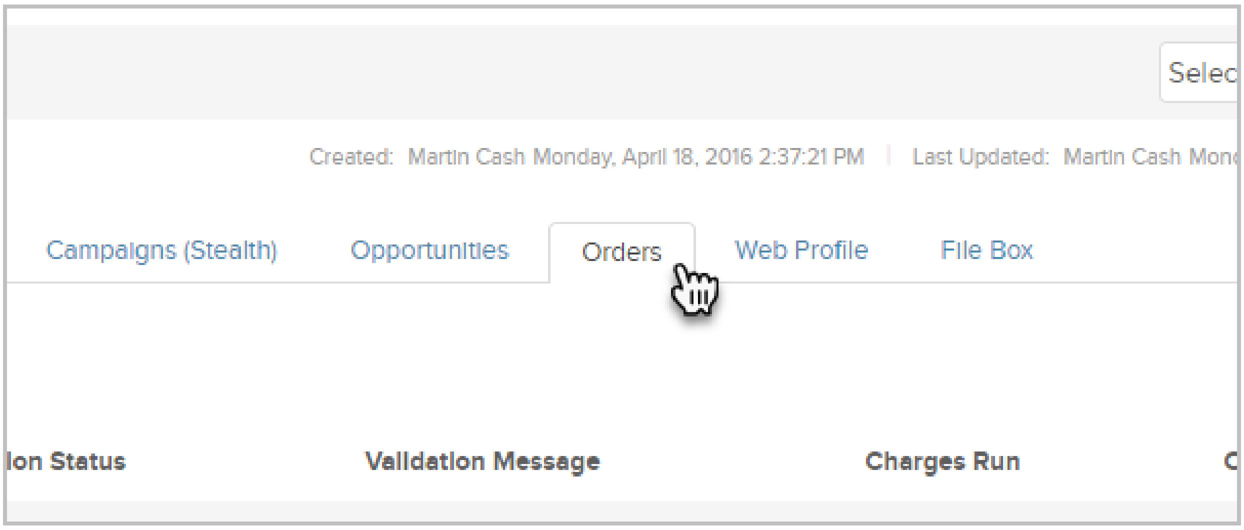
Make A Credit Card Inactive

Last Modified on 08/01/2018 3:39 pm MST

1. While viewing a contact record, click on the **Order** tab.



2. Click on the credit card link.

3. Click on the **Make Inactive** and then click on **OK** to continue.

4. Review the credit card information to confirm it is the correct card and to view the automatic billing currently linked to the card. Go to the *Other Cards* section to reassign billing from the current card to another card on file.

Be Careful! You have the option NOT to reassign billing to a new card. However, if you do not reassign active subscription billing to a new card, the customer will not be billed.

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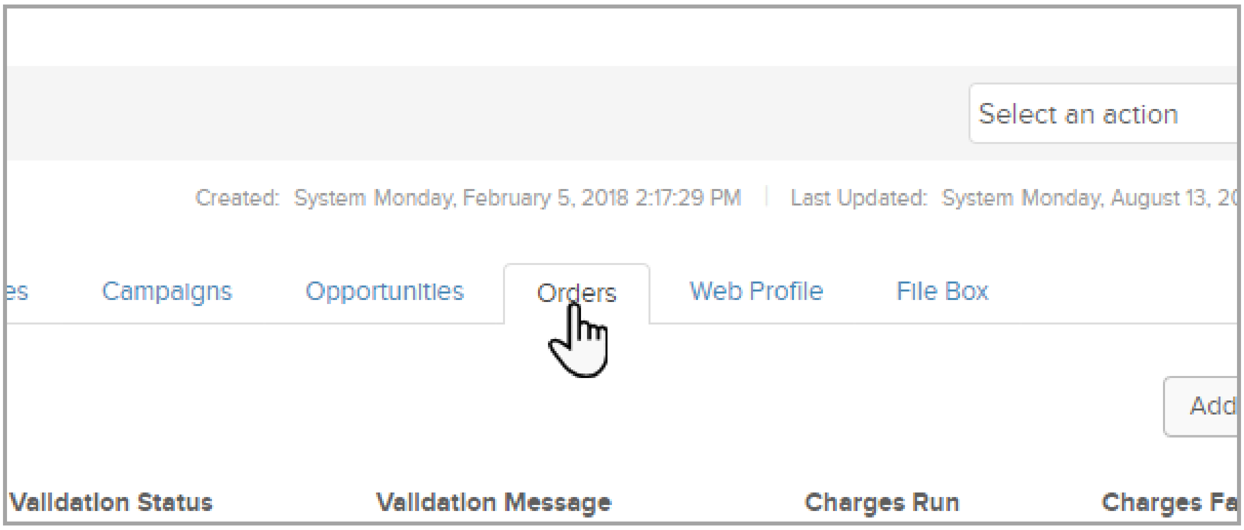
Viewing A Credit Card Number

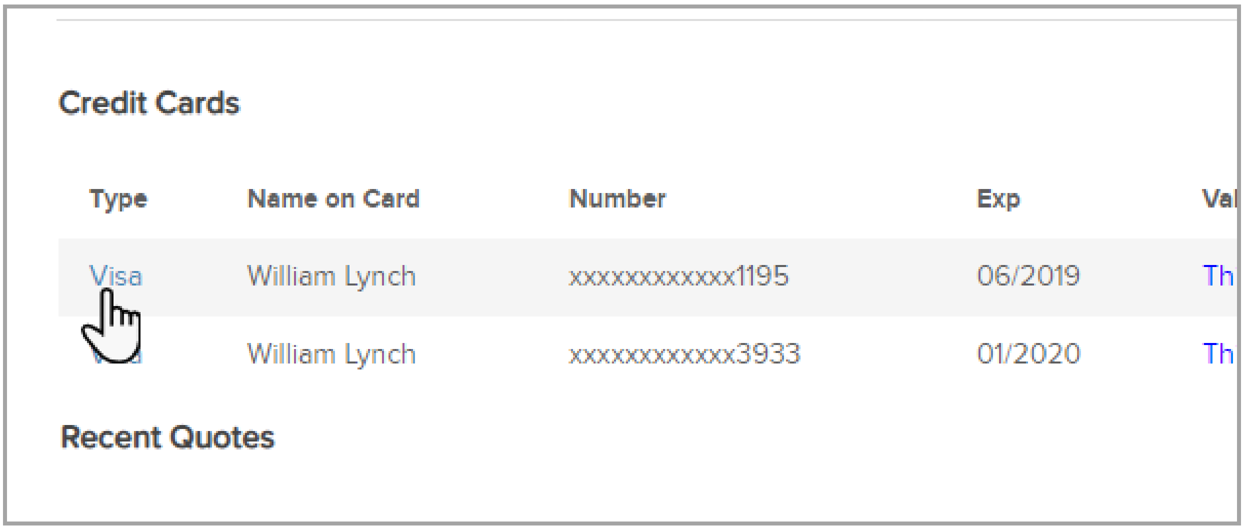
Last Modified on 09/20/2018 5:54 pm MST

The credit card data stored in Infusionsoft is encrypted by default. This is required by the Payment Card Industry Security Standard (PCI DSS). This protects your customers from credit card fraud and protects you from related legal issues. Users must have the "Can reveal credit card data" permission in order to view credit card data. Your company's Infusionsoft system administrator will need to grant you this permission.

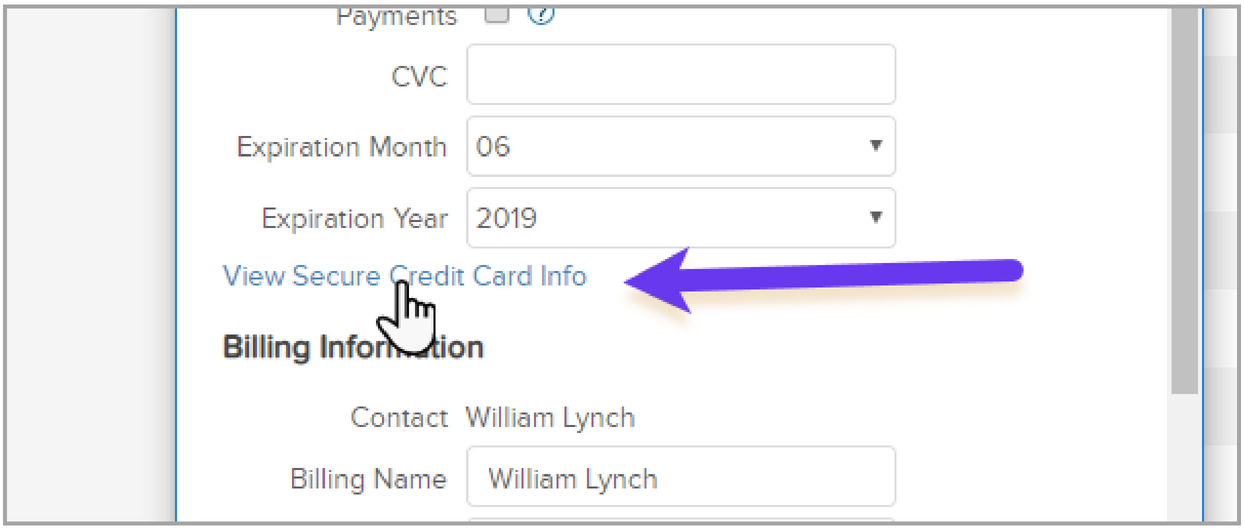
1. While viewing a contact record, click on the **Order** tab.



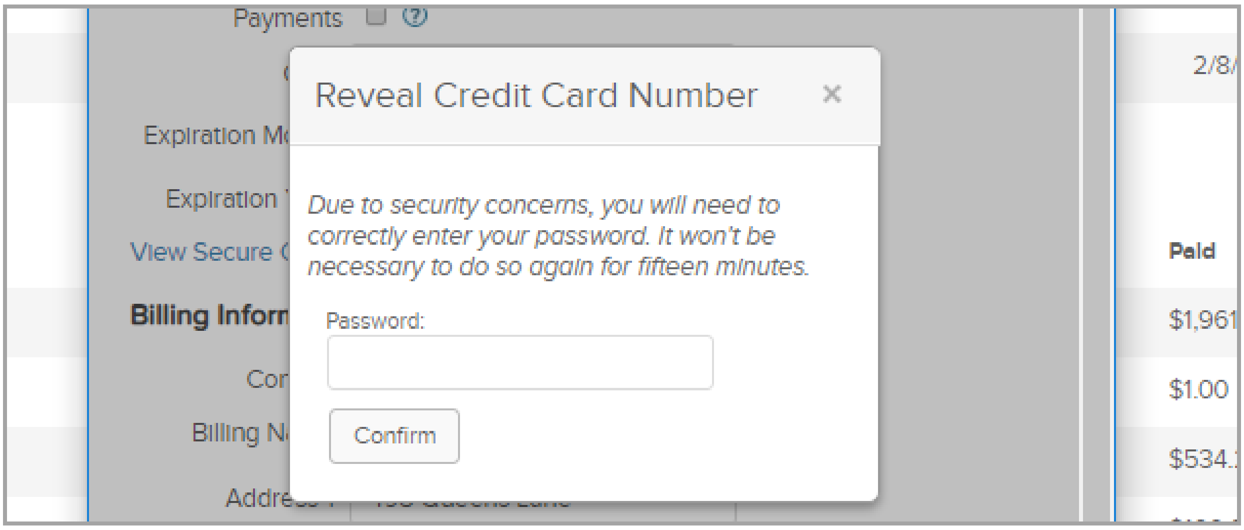
2. Go to the *Credit Cards* section and click on the credit card link.



3. Go to the *Credit Card Information* section and click on **View secure credit card information**. Note: If you don't see this link, you don't have permission to view credit card information.



4. Enter your Infusionsoft password to confirm your identity. The system will give you access to credit card data for up to 15 minutes. After 15 minutes, the system will automatically disable access, and you will need to re-confirm your identity to access the information again..



Default Credit Card Settings

Last Modified on 08/01/2018 3:41 pm MST

The Credit Card Settings allow you to customize the style on the Infusionsoft credit card update portal, create credit card update related actions, and more.

1. Go to **E-Commerce** > **Settings**

2. Click on **Orders** in the *settings* menu.

3. Go to the *Credit Card* section to edit the following defaults.
    - **CC Types**: This list shows up on Order Forms and the Shopping Cart checkout page. Customers select a credit card type from a dropdown list. Edit this list so that it only displays the types of credit cards you're willing to accept.
    - (Optional) **Allow UK Maestro Cards**: Set to *Yes* if you want to accept Maestro Cards (UK Only) and then add Maestro Card to the CC Types list.
    - **Update Credit Card Page Header, Footer, and Thank You Message**: If you use the Infusionsoft Credit Card Update portal to request updated information when a card is expiring or has an issue, then you'll want to customize these areas to match your brand. This portal is accessed through an email merge link sent through an Order Trigger. The Header and Footer display above and below the secure update form. The Thank You Message displays after the form is submitted.
    - Credit Card Update Actions:
        - **Clicked Update Credit Card Link** - Click on Actions to tag a customer or send an internal notification email when someone clicks on the credit card update merge link in a billing email. This automation can help you identify people who clicked to update, but may not have been successful.
        - **Updated Credit Card via Link** - Click on **Actions** to set up automation when a customer successfully updates their credit card through this link. This Action should send an internal notification to view the order and attach the new credit card to it. Note: The credit card update interface collects the new credit card information, but does not update the card associated with the order - this must be done manually.

4. Scroll to the bottom of the settings and click on **Save** to apply the updates.

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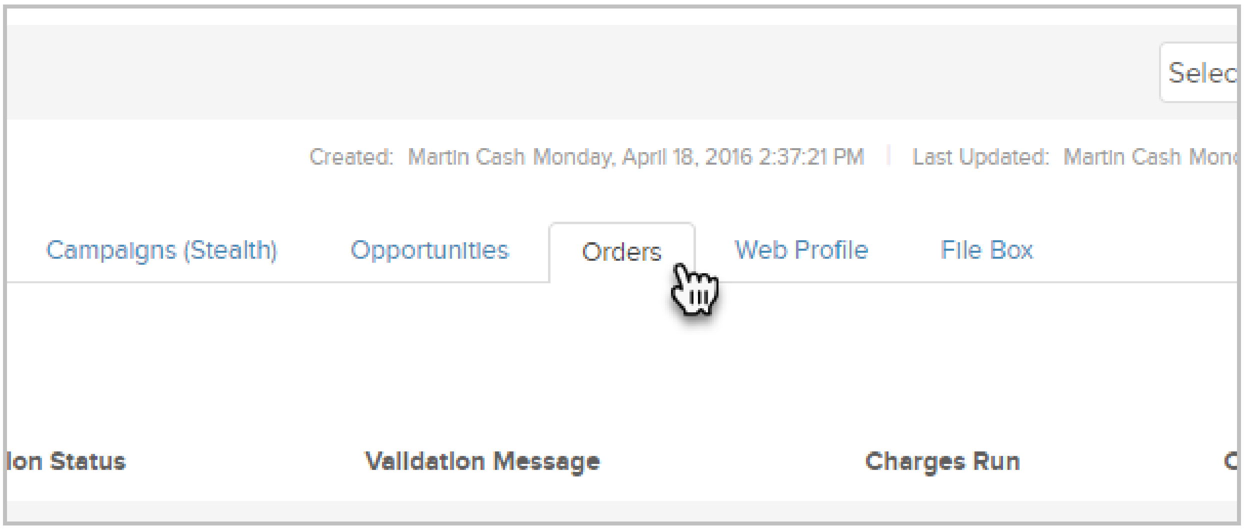
Canceling Your Customer's Subscription

Last Modified on 08/01/2018 3:45 pm MST

You are able to cancel and deactivate subscriptions manually when a customer contacts you by phone, email, or in person and asks to discontinue a service or upgrade to another service.

Automation Warning! These instructions will help you turn off the billing for a subscription program. However, inactivating a subscription does not stop any fulfillment processes or follow-up sequences. You may need to stop these processes manually or notify others to stop fulfilling.

1. While viewing a contact record, click on the **Order** tab.



2. Click on the name of the subscription to open it.

3. Go to the *Current Status* section to...
   - Change the **Status** to Inactive. Setting the status to inactive means that the customer canceled a subscription before the original purchase term expired.
   - Enter the **End Date**.
   - Enter the **Reason Stopped**.

4. Go to the **Recharge Information** section and set auto charge to **No**.

5. Click on the **Save** button to inactivate the subscription. The customer will no longer be billed for the subscription.

Void A Payment

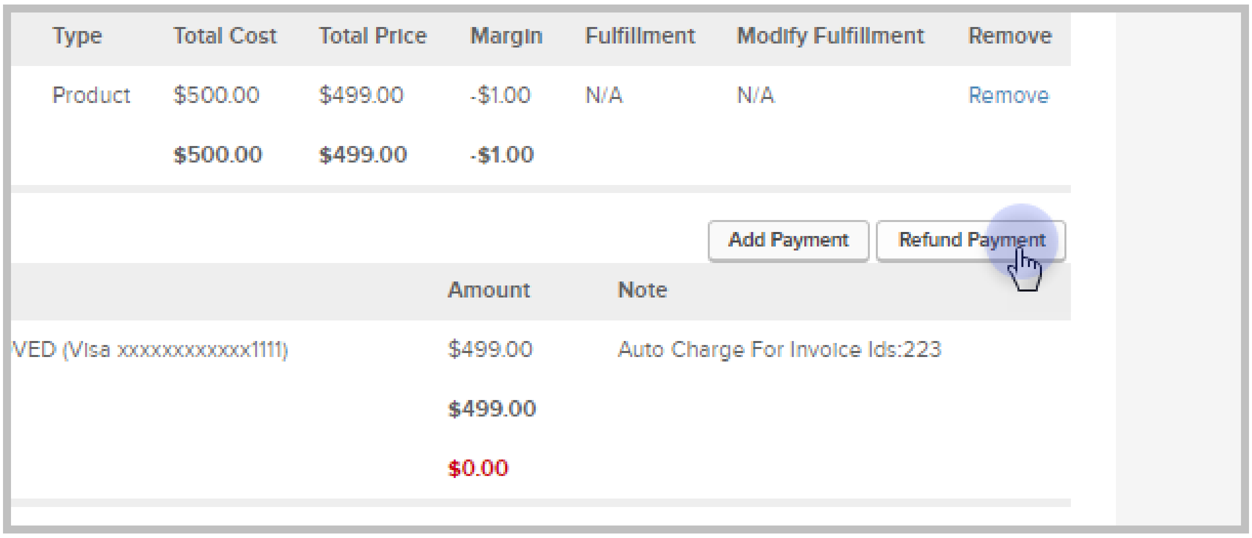
Last Modified on 08/01/2018 3:46 pm MST

You generally void a transaction when a customer cancels an order right away, makes duplicate purchases in error, or asks to change their method of payment. You can only void pending transactions - the ones that have not yet been settled by your merchant account (which usually happens the same business day as the original charge). You can verify the payment's status by logging into your merchant account and searching for unsettled transactions. An unsettled transaction is a charge that the customer can currently view on their account transactions as a pending charge, but it will be removed (normally by the next business day) when you void the payment.

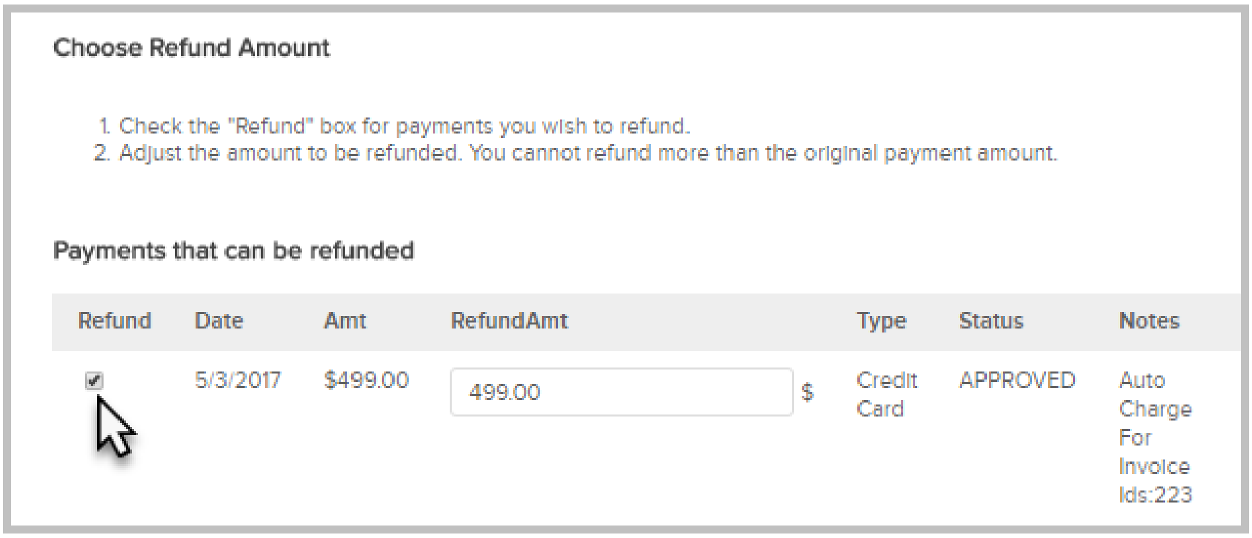
1. While viewing a contact record, click on the **Orders** tab.

2. Click on the name of the order to open it.

3. Click the **Refund Payment** button

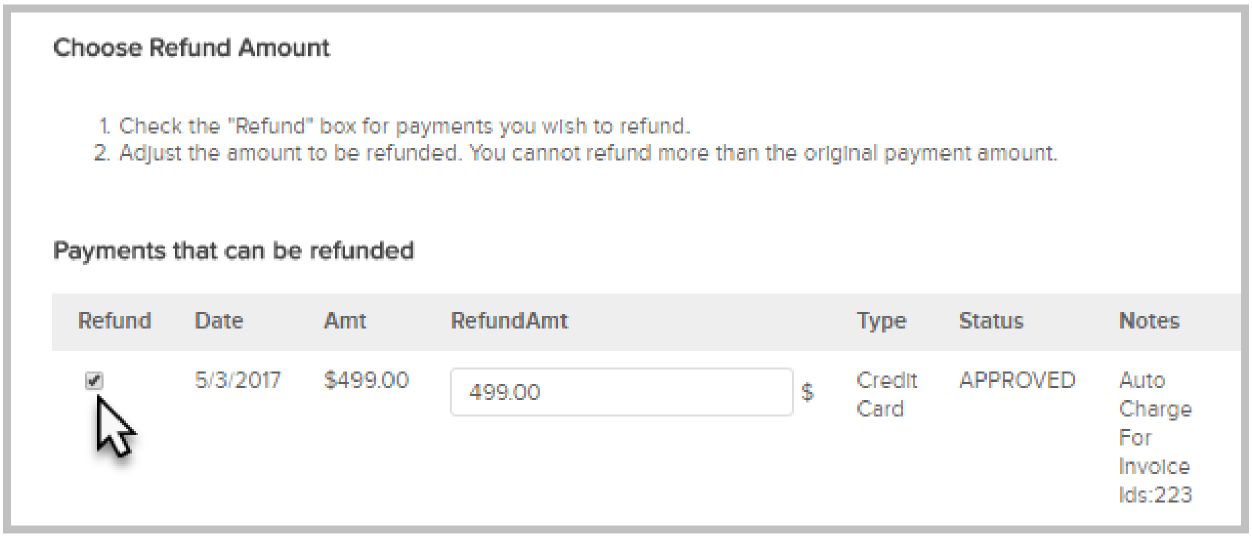


4. Mark the checkbox beside the payment you wish to void and enter the reason for the void.

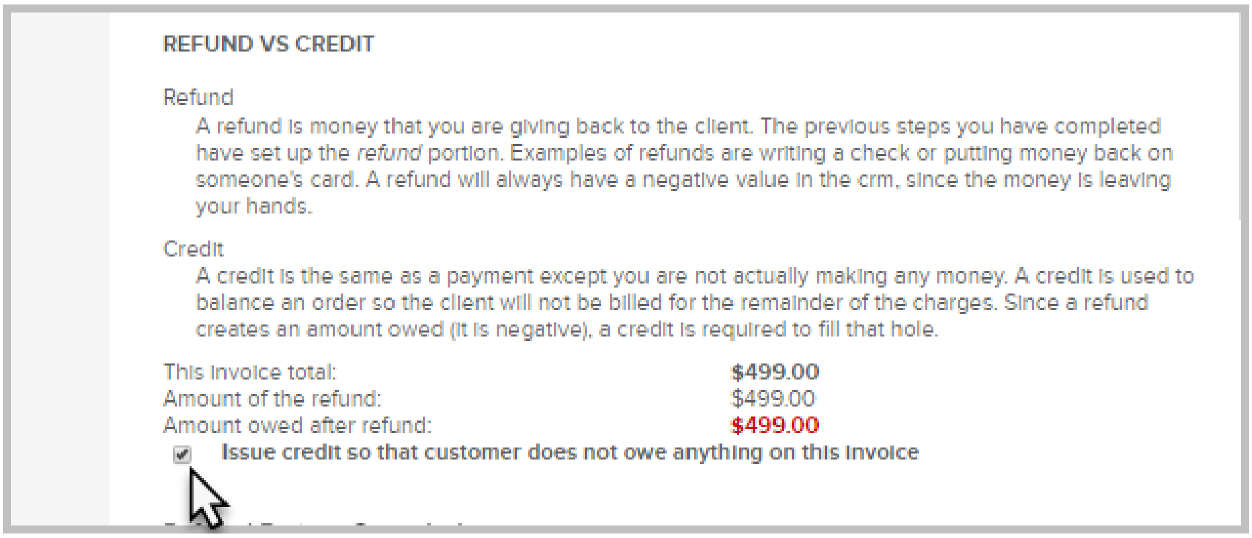


5. Click the Next Button to Proceed. Note: When you void a payment, you will cancel the entire amount. You cannot adjust the refund amount.

6. Choose **Void** from the *Gateway Options* and click on the **Next** button to proceed. A void cancels a pending charge in the merchant account so that it never appears on the customer's credit card statement. Note: If the gateway does not show up on the list, then you must log into the merchant account separately to void the transaction.



7. In the **Issuing a Credit** section select the check box to **Issue credit so that customer does not owe anything on this invoice** if the voided balance should not return the owed balance. If the contact will still need to pay this voided balance, leave the box un-selected.



8. (Optional) Go to the **Referral Partner Commissions** section to tell Infusionsoft how to adjust referral partner commissions after the void is processed.
   - **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Infusionsoft will retract or take back the commissions that the partner earned for this sale, based on the refund amount.
   - **Apply Credit to Referral Partner Commissions:** If you mark this checkbox, Infusionsoft will retract or take back the commissions that the partner earned for this sale, based on a credit applied to a future balance due. *Note: This does not apply to voids.*

9. Click on the **Next** button to confirm you want to complete the void. The customer will receive an invoice confirming that the void has been processed. Review the status messages on this screen. They will tell you if the charge was refunded automatically or if you need to log into your merchant account to complete the financial end of the refund process.

10. Click on **Next** again to review the adjusted order record.

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Issue A Refund

Last Modified on 08/01/2018 3:46 pm MST

You will refund a customer payment when these 2 circumstances are true:

- The payment was processed through one of the merchant accounts you have linked to Infusionsoft
- The payment has settled and is no longer a pending charge in the merchant account

Because the payment settled, the funds will be deposited into your account. The subsequent refund will be debited from your account. The refund option will return funds to the customer after they were previously charged. Both the charge and the refund will appear on the customer's account transaction history.

Pro-tip! If the customer paid a partial payment for the order, you can issue a credit for the remaining balance due as you go through the refund process.

1. While viewing the contact record, click the **Order** tab.

2. Click on the name of the order to open it.

3. Click the **Refund Payment** button

4. Mark the checkbox beside the payment you wish to refund, enter the reason for the refund, then click on the **Next** button.

5. Choose Refund. This will initiate the refund process for a charge that has already fully processed in the merchant account. Note: If the gateway does not show up on the list, then you must log into the merchant account separately to issue the refund.

6. Go to *Error Handling* to tell the system what to do if the automatic refund fails.
    - **If an automatic refund fails, record the refund anyway**: this option records the refund as completed, even if the merchant gateway does not automatically issue the refund.
    - **If an automatic refund fails, skip that payment**: this option does not record the

refund unless the gateway successfully completes the automatic refund.

7. Click on the **Next** button.

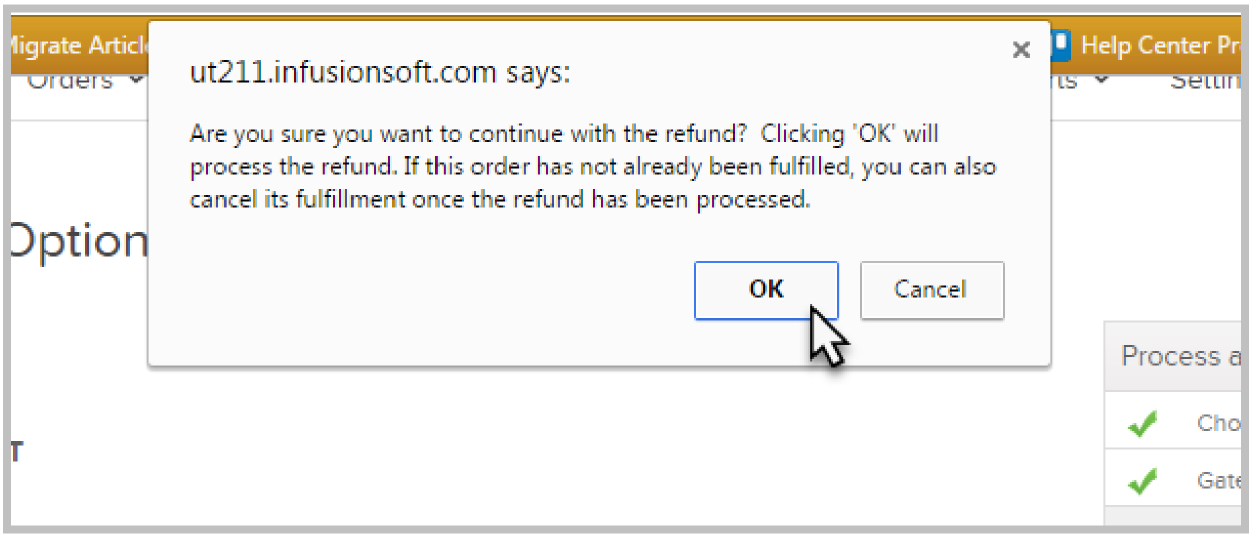
8. Go to the **Issuing a Credit** section to enter a balance due beside **How much should the client owe you after this transaction is complete?**
    - If you enter a *$0.00* as the balance due, Infusionsoft will record a refund for the amount indicated AND a credit for any remaining balance due.
    - If you enter a positive value, the customer will have a pending balance after you void the transaction. This might be necessary if the customer asks you to refund a credit card transaction, but the customer technically still owes the order balance.

      Warning! Make sure to keep this at $0.00. This will charge the customer whatever is entered with in this field.

9. (Optional) Go to the **Referral Partner Commissions** section to tell Infusionsoft how to adjust Referral Partner Commissions after the void is processed.
    - **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Infusionsoft will retract or take back the commissions that the referral partner earned for this sale, based on the refund amount.
    - **Apply Credit to Referral Partner Commissions**: If you mark this checkbox, Infusionsoft will retract or take back the commissions that the referral partner earned for this sale, based on a credit applied to a future balance due.

10. Click on the **Next** button to confirm you want to complete the refund. If the order has the option to 'Email the invoice to the customer upon successful payment' is enabled, the customer will receive an invoice confirming that the refund has been processed. Review the confirmation screen to check the status of the refund and confirm the refund amount and credit amount are correct.

11. Review your work before clicking **OK** to process the refund.



12. Click on the **Next** button again to review the adjusted order record.

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Issue A Credit Or Apply A Price Adjustment To An Order

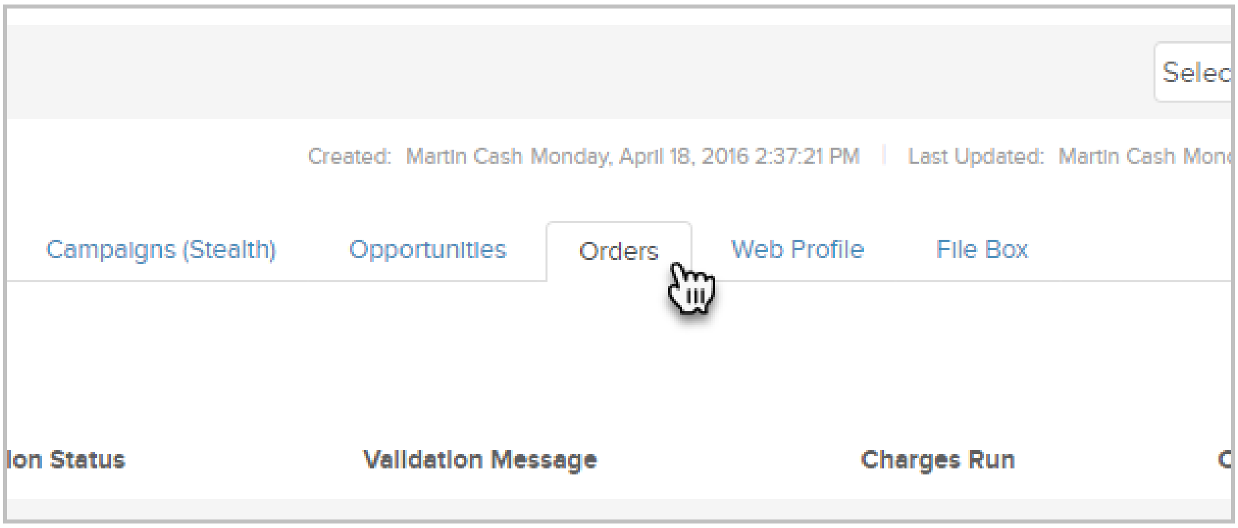
Last Modified on 09/20/2018 4:43 pm MST

You will generally issue a credit or apply a price adjustment against an unpaid order balance. If the customer has already submitted a full or partial payment, then you will need to issue a void, refund, or manual refund. For info on how to "Issue a Refund", click here . If the credit or adjustment is part of a refund request, then you will apply the credit as you go through the refund process.

> **Note:** Void ONLY if it is **PENDING** in the Merchant account. For more info, click here

Credits/adjustments are recorded as payments. You can pull up a list of them through the payments report (**E-Commerce > Reports >Payments Report.**)

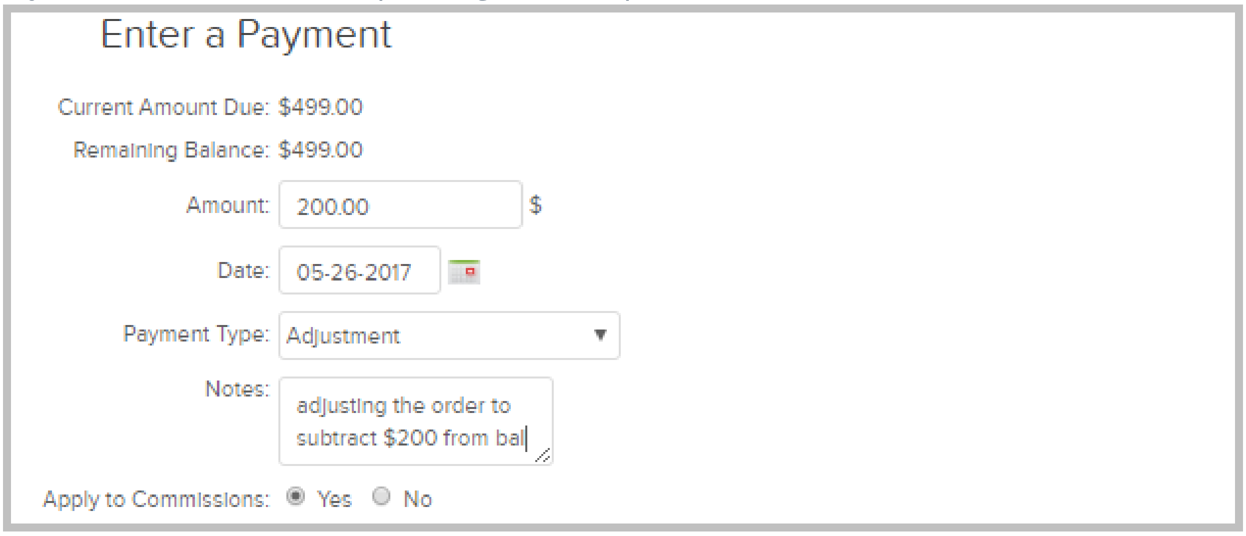
1. While viewing a contact record, click on the **Orders** tab.



2. Click on the name of the order to open it.

3. Click the **Add Payment** button

4. Enter the Payment Information:
    - **Amount**: (Enter the credit / adjustment amount). This amount will be deducted from the remaining balance due amount.
    - **Date**: Enter the date (usually today's date.)
    - **Payment Type**: Select Adjustment, Credit, or Refund from the dropdown.
    - (Optional) Enter **Notes** about the reason for the adjustment. Common reasons may include a price adjustment, a courtesy credit for a service issue, etc.
    - (Optional) **Apply to Commissions**: Choose *No* to prevent the price adjustment/credit from updating referral partner commissions.



5. Click on the **Save** button to apply the adjustment to the invoice. Note: If you automatically email invoices upon successful payments (**E-Commerce** > **Settings** > **Orders** > **Billing** section), then the customer will receive an invoice notification when you save the adjustment.

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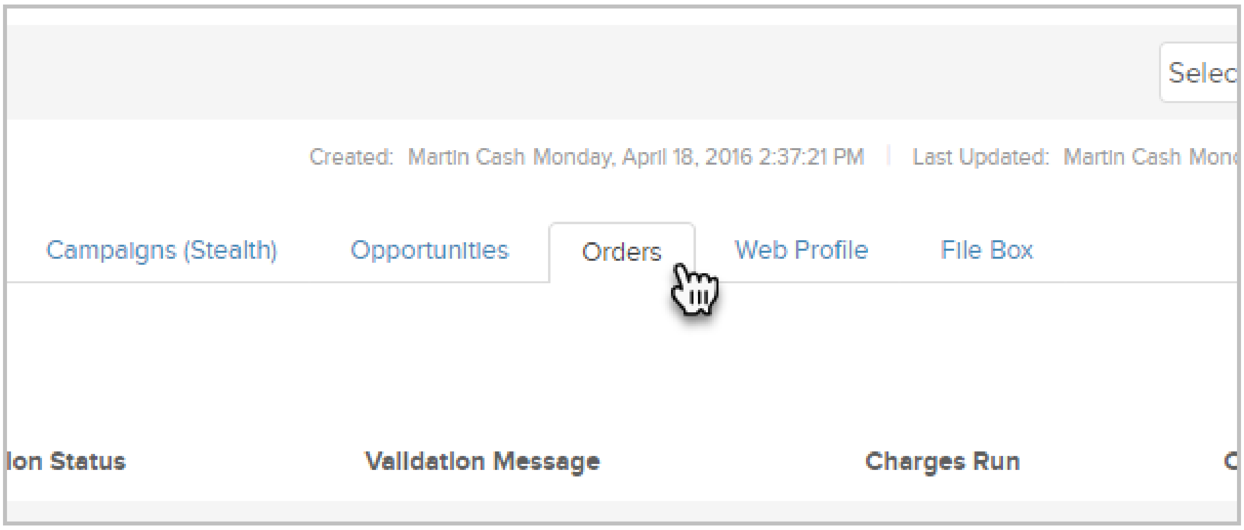
Issue A Credit For A Recurring Payment

Last Modified on 10/02/2018 9:44 am MST

You may need to issue a credit against future recurring subscription billing as part of a special incentive to customers or as part of your subscription program retention efforts. Issuing a credit will decrease the amount of a future payment or cause the system to skip the auto-charge because there is a zero current balance due.

1. While viewing a contact record, click on the **Orders** tab.



2. Click on the name of the subscription to open it.
3. Click the **Create Credit** button.
4. Enter the credit Information.
   - **Cycles**: By default, the system will apply this credit to one billing cycle. Change this number to apply the credit to more than one cycle.
   - **Credit Amount Per Cycle**: Enter the amount of credit to apply to each billing cycle. The credit can be any amount up to the recurring value for one billing cycle.
   - **Credit Notes**: Enter notes to document the reason for the credit.
5. Click on the **Save** button to apply the credit.
   The credit summary will show up in the Recurring Credits section of the subscription record.

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Manage Chargebacks

Last Modified on 08/01/2018 3:48 pm MST

A customer may initiate a chargeback when they think you have charged their credit card in error. The dispute may be the result of a stolen credit card, service issue, fulfillment error, or the customer just forgot. It's also possible that the customer didn't recognize the company name displayed on the line-item charge on their credit card statement.

When this happens, the credit card company will investigate the issue and ask you to provide documentation that validates the charge. Infusionsoft automatically captures a screenshot of each order placed through the shopping cart that can be sent to a credit card company when a chargeback dispute occurs. These settings help you customize the message you send to the credit card company.

The Chargeback Dispute documentation will show:

- Order Date.
- IP Address for the computer where the order was placed
- Billing and Shipping information
- Order Details - products, discounts, shipping, and tax

Important! This feature is only available for one-time orders. It is not available for subscriptions.

Customize the Chargeback Dispute Message

1. Go to **E-Commerce** > **Settings**
2. Click on **Orders** in the *settings* menu.
3. Scroll down to the *Chargeback Dispute* section to edit the following defaults:
    1. **Top Text**: Enter the message that will display at the top of the chargeback dispute message (e.g., your company's address and contact information.)
    2. **Single Step Text**: Enter the message that will display at the bottom of the chargeback dispute message when the purchase was placed through a single-step shopping cart. Note: The single-step cart is most common.

   3. **Multi Step Text:** Enter the message that will display at the bottom of the chargeback dispute message when the purchase was placed through a multi-step shopping cart. The multi-step carts require the buyer to sign in and are less common.
4. Scroll to the bottom of the settings and click **Save** to apply the update.

To Print the Chargeback Dispute Documentation

1. Find the customer's contact record.
2. Go to the **Order** tab in the bottom row of tabs on the contact record.
3. Click on the name of the order to open it.
4. Go to the bottom of the order and click on **Chargeback Dispute**.
5. (Optional) Customize the Header and Footer text that shows up above and below the invoice.
6. Click on **Save & View** to print the order documentation to send it to the card holder's credit card company.

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Change The Next Bill Date For A Subscription

Last Modified on 08/01/2018 3:48 pm MST

A subscription product involves recurring billing based on the cycle you established when creating the product record. The next bill date is established based on this billing interval. Customers may occasionally ask you to change the next bill date so that the timing of the autocharge is more convenient. When you change the next bill date, the amount of the upcoming autocharge may also adjust if the "prorate" setting is enabled on the product's subscription plan. This setting is most often used for service products that involve access to a membership program or personal consulting / coaching because the service continues to be fulfilled, even though the bill date is changed.

The fulfillment of a physical product is not centered around time investment, so these types of products generally do not need to be prorated.

For Example: You run a marketing agency that charges clients a monthly fee of $1000 that includes up to 3 hours of work each month. You have a small business customer whose autocharge generally takes place at the beginning of the month. This customer contacts you and asks you to adjust the bill date so that the autocharges come after the 15th of the month. This change does not impact their access to your services - you continue to fulfill as normal, even though the date is changed.

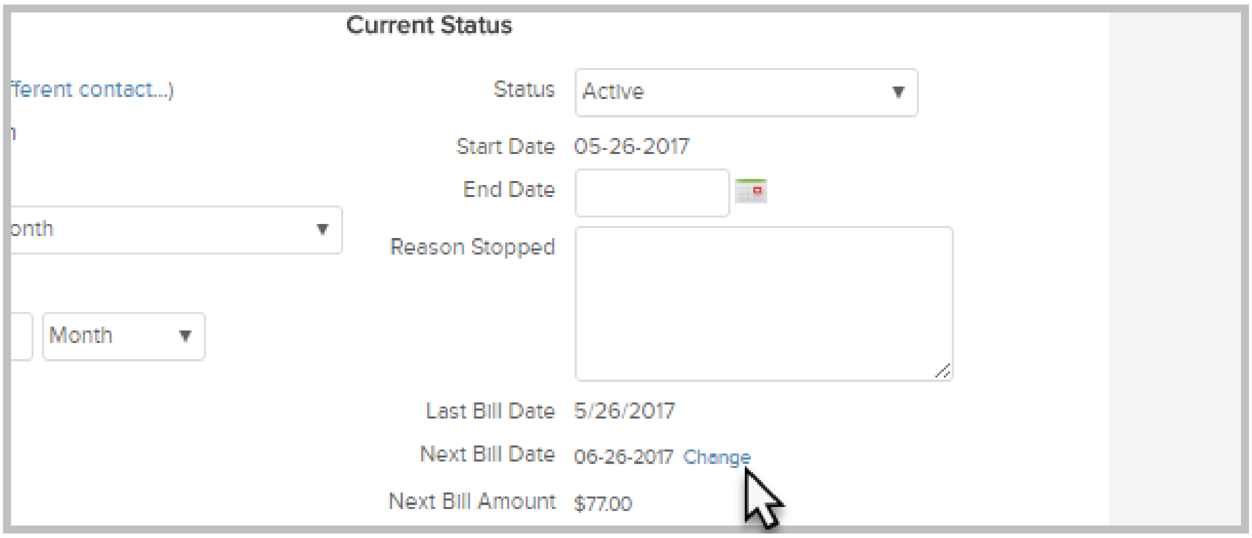
If you move the next bill date forward (and the prorate setting is enabled), the system will automatically increase the amount of the next autocharge.

After the next autocharge takes place, the amount billed will return to normal.

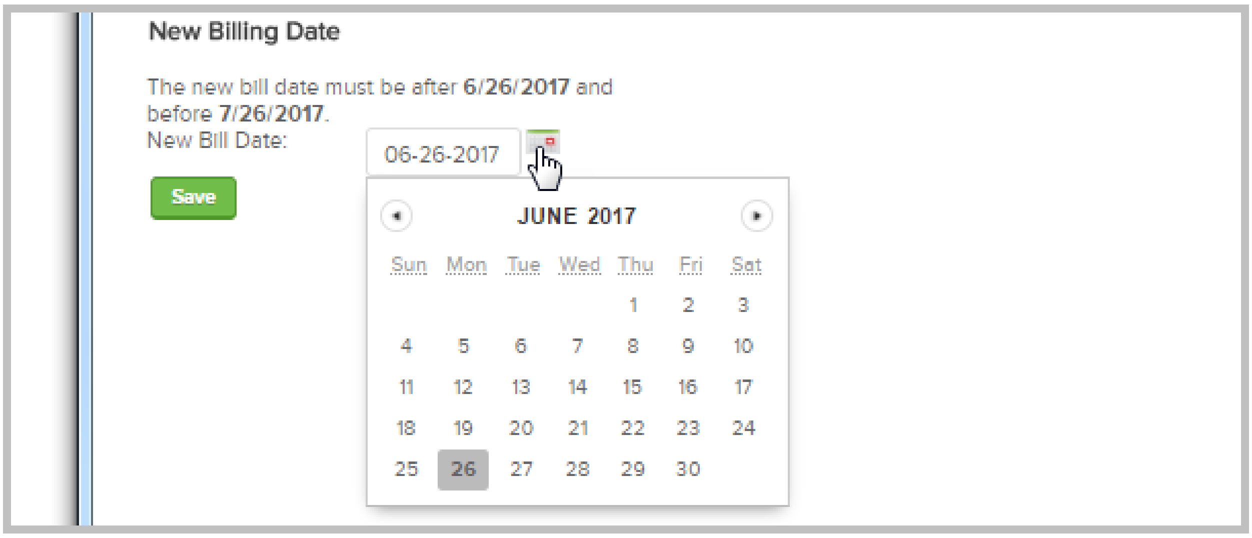
1. While viewing a contact record, click on the **Order** tab, and scroll to the Subscriptions section.

2. Click on the name of the subscription to modify it.

3. Go to the **Current Status** section and click on *Change* beside the next bill date.



4. Click the calendar icon to choose a new date for the next billing cycle.



5. Verify the new bill date is correct and click **Save**.

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Balance A Customer's Account That Was Refunded Outside Of Infusionsoft

Last Modified on 08/01/2018 3:48 pm MST

When you manually refund a payment, the refund is recorded in Infusionsoft, but you must handle the financial end of the transaction outside of Infusionsoft. You will need to manually record the refund if:

- The refund has been issued from the merchant account already
- The customer paid with cash or check and the refund is being issued by check or cash
- The customer paid with a credit card, but the charge was processed outside of Infusionsoft

If the customer paid a partial payment for the order, you can apply a credit for the remaining balance as you go through this manual refund process.

1. While viewing the contact record, click on the **Order** tab.

2. Click on the name of the order to open it.

3. Click the **Refund Payment** button

4. Mark the checkbox beside the payment you wish to refund, enter the reason for the refund, and click the **Next** button.

5. Choose **Manual** if the order was originally processed through your merchant account. A Manual refund records the fact that the refund took place, but does not process the financial end of the transaction. Note: If the purchase was made by check, cash, or an outside credit card processing system, you will not see a gateway listed.

6. Click on the **Next** button.

7. Go to the **Issuing a Credit** section to enter a balance due beside **How much should the client owe you after this transaction is complete?**
    - If you enter a *$0.00* as the balance due, Infusionsoft will record a refund for the amount indicated AND a credit for any remaining balance due.

    - If you enter a positive value, the customer will have a pending balance after you void the transaction. This might be necessary if you issue a refund, but the customer technically still owes the order balance.

8. (Optional) Go to the **Referral Partner Commissions** section to tell Infusionsoft how to adjust commissions after the refund is processed.
    - **Apply Refund to Referral Partner Commissions (Clawback):** If you mark this checkbox, Infusionsoft will retract or take back the commissions that the partner earned for this sale, based on the refund amount.
    - **Apply Credit to Referral Partner Commissions:** If you mark this checkbox, Infusionsoft will retract or take back the commissions the commissions that the partner earned for this sale, based on a credit applied to a future balance due.

9. Click on the **Next** button to confirm that you want to complete the manual refund. The customer will receive an invoice confirming that the refund has been processed. Review the confirmation screen to check the status of the refund and confirm the refund amount and credit amount are correct. Make sure you manually process the financial end of the refund transaction by issuing a check or manually issuing a refund through your merchant account.

10. Click on the **Next** button again to review the adjusted order record.

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Refunding Options In Infusionsoft

Last Modified on 08/01/2018 3:49 pm MST

The three available refund options are: **Void**, **Refund**, and **Manual Refund**.

In Summary:

- Void the payment when the transaction took place on the same day of the refund request.
- Refund the payment when you want to return funds from your account to the customer's account.
- Issue a Manual Refund when you've already refunded the customer outside of Infusionsoft and simply need to balance the customer's account in Infusionsoft.

Void

You generally void a transaction when a customer cancels an order right away, makes duplicate purchases in error, or asks to change their method of payment. You can only void pending transactions. A pending transaction is one that has not yet been settled by your merchant account (which usually happens the same business day as the original charge). You can verify the payment's status by logging into your merchant account and searching for unsettled transactions. An unsettled transaction is a charge that the customer can currently view on their account transactions as a pending charge, but it will be removed (normally by the next business day) when you void the payment.

Refund

You can issue a refund when the payment has settled and is no longer a pending charge on the customer's account transactions. Because the payment settled, the funds will be deposited into your account and the subsequent refund you issue to the customer will be debited from your account. Whereas no funds are actually exchanged in the void option, the refund option will return the funds to the customer after they were previously charged. Both the charge and the refund will appear on the customer's account transaction history.

Manual Refund

The purpose of this option is to simply balance the customers account in Infusionsoft without actually processing a refund. You may need to issue a manual refund when you've already processed the refund through your merchant account or when you refund a cash, check, or credit card payment that was not processed through the merchant account.

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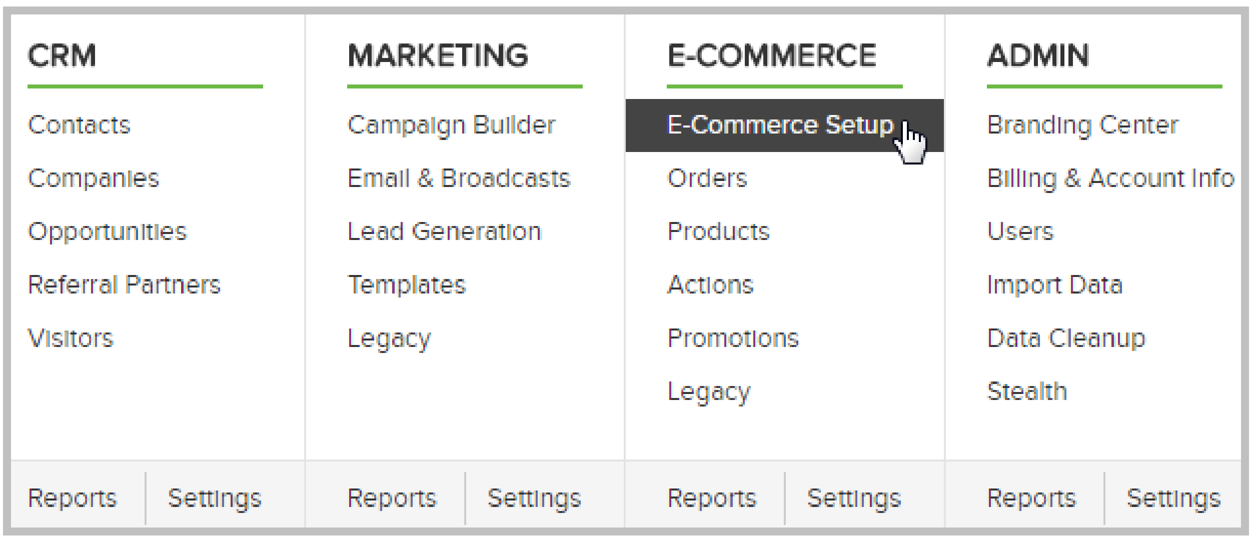
Set Up An Order Form

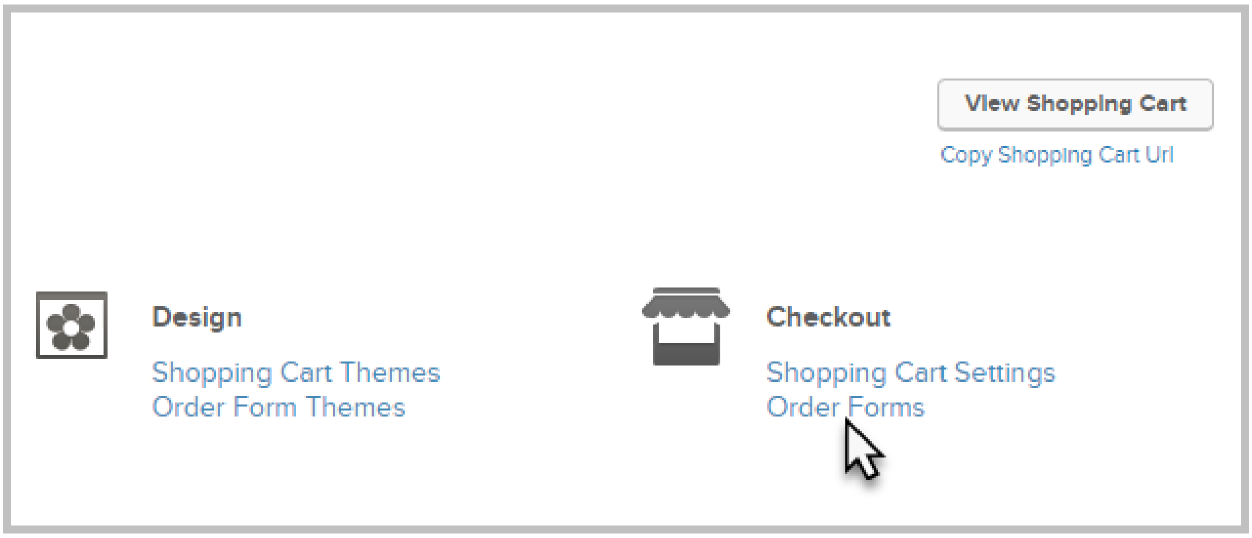
Last Modified on 08/01/2018 3:49 pm MST

Pro-Tip: Order forms can hold up to 15 total products and/or services per form.

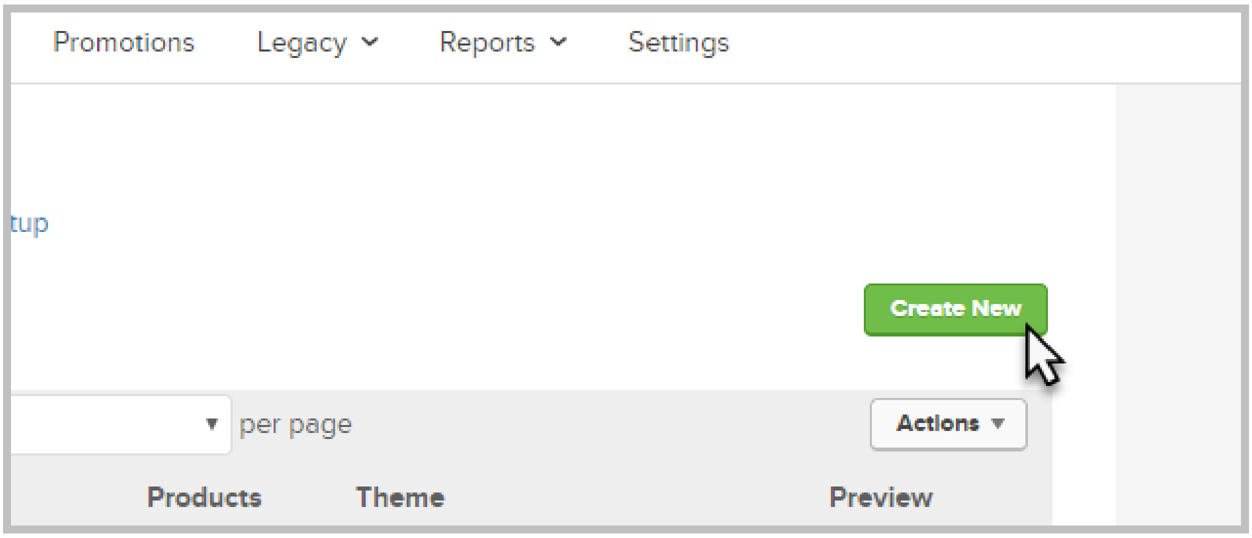
1. Go to **E-Commerce > E-Commerce Setup**



2. Click **Order Forms**

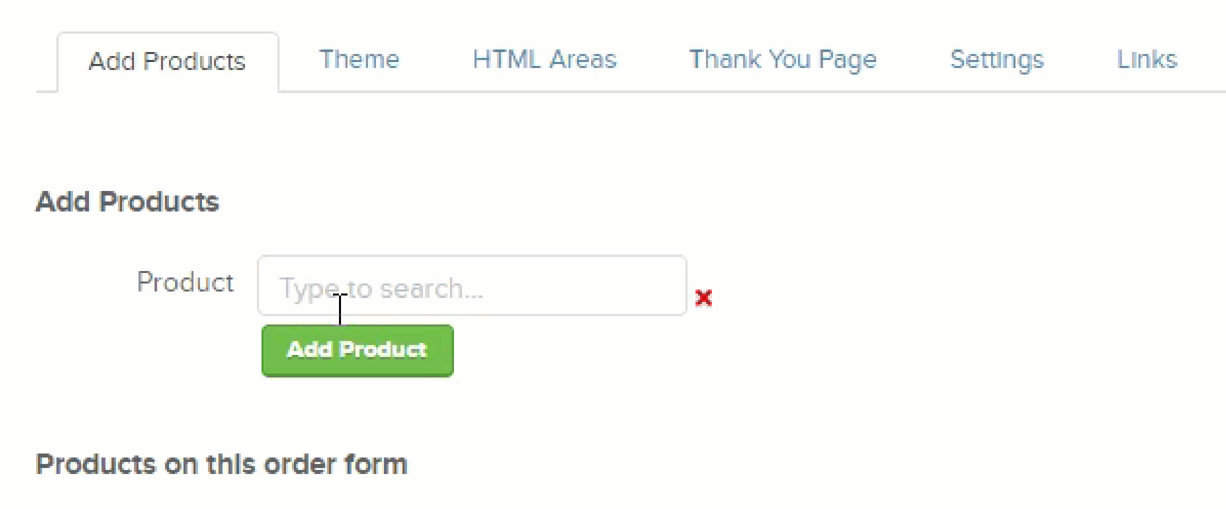


3. Click the **Create New** button



4. Name your order form and click **Save**.

5. Begin typing the name of the product in the text box and select it from the drop-down.



6. Click the **Add Product** button. You can add up to 15 products and subscriptions per order form. You have the option to change the name of the product in the *Label* column. You may also change the quantity of each item. Check the box at the bottom to lock your quantities so a buyer cannot change them on the order form.

7. Click on the **Themes** tab. This tab allows you to preview the current active theme for this order form or choose a different theme.

8. Select the order form theme you would like to use and click **Make Active**.

9. (Optional) Click the **HTML Areas** Tab. HTML Areas are containers that allow you to add HTML to various locations on the order form. Each area is accompanied by a thumbnail image illustrating the exact location, as well as a *Preview* and *Save* button.

10. Click the **Thank You Page** tab. After a successful purchase, the customer will need to be redirected to a Thank You page. You can create a custom Thank You page using the built-in Thank You Page builder. It's best practice to create this in the Branding Center. You can also choose to send them to a custom web address.

11. Click the **Settings** tab. This section allows you to:
    - Change the name of the order form
    - Select the merchant account to use.
    - Change the duplicate checking setting
    - Send an email to yourself when an order is placed
    - Hide live promo codes.

12. Click the **Links** tab. Both of these links will take you to the hosted order form. The custom URL can be modified by clicking the **Edit** button next to it.

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Create An Order Form Theme

Last Modified on 08/31/2018 10:00 am MST

Order form themes allow you to customize the appearance of an order form to match your style and branding. There are several pre-designed themes to choose from or you can create and modify your own themes.

Warning! If the CSS is changed for one theme, those changes will apply to all order forms using that theme!
The **Edit CSS** tab is divided into two sections: **Appearance CSS** and **Layout CSS**.

1. Go to **E-Commerce > E-Commerce Setup**

2. Click on **Order Form Themes** in the **Design** section.

3. Click the **Create New Theme** button.

4. Choose a one-column or two-column layout. You can hover over the thumbnail to see

more information.

5. Choose an existing theme to use as your base theme.

6. Click on the **Use This Theme** button to select the theme to use.

7. Name your theme and click **Save**.

8. Upload your company logo image that will be present in the top banner area of the order form. Please note that banners will display a maximum width of 960 pixels.

9. Click **Edit** then **Browse**. Once you have chosen the image you would like to use, click **Save**.

10. (Optional) Click over to the **HTML Areas** tab. The HTML Areas allow you to customize different locations of the order form with your own custom HTML. Each area is accompanied by a thumbnail image illustrating the exact location, as well as a Preview and Save button. Each HTML area is referenced in *Layout.css*. This section requires advanced knowledge of HTML. If you require a professional to help you modify the theme to fit your style and branding, take a look at our Marketplace for an Infusionsoft certified design consultant.

    Pro Tip! Certain themes will include sample images that are pre-loaded into the design. Go to the HTML areas to either change out the images via code or delete the code entirely to remove the sample images.

11. (Optional) Click on the **Labels** tab. This gives you the flexibility to change the default label names on the order form.

12. (Optional) **Click the Edit CSS** tab. This section allows a web developer to customize the layout to match your website. It also allows for more custom and complex designs. This section requires advanced knowledge of CSS. If you would like to learn more about CSS, check out W3schools for instructions and tutorials. If you would like to hire a professional to help you modify the theme to fit your style and branding, take a look at our Marketplace for an Infusionsoft certified design consultant.
    - **Appearance.css** controls colors, fonts, borders, background images and background colors. It contains the following subsections:
        - Product Grid

        - Forms
        - Upsells
        - Typography
        - Links and Buttons
        - Misc
    - Layout.css controls margins, padding, width, height, positioning, floats and alignment. It contains the following subsections:
        - Product Grid
        - HTML Areas
        - Forms
        - Form fields and labels
        - Tables
        - Upsells
        - Typography
        - Links and Buttons

13. You can change the font to another Google Web Font by replacing the link, or delete this line entirely and choose a standard web font such as Georgia or Verdana. This can be accomplished by changing the fonts specified throughout Appearance.css. Follow the link for more information on web safe fonts . The order form contains a header, content area and footer. It might also contain a right column depending on the layout chosen. You can create your own custom header either by inserting the appropriate HTML under *Custom Header* in the *HTML Areas* tab, or replacing the current header image in the Images tab.

This is the basic code structure for an order form:

```

(wraps around the entire order form and centers it)
```

(contains header image from images tab)

(contains all the content of the order form)

(contains anything entered in 'Right Column' HTML area)

(Contains anything entered in 'Footer' HTML area)

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Accept Donations Of Varying Amounts

Last Modified on 08/01/2018 3:50 pm MST

Use case: Non-profit organization or a special event that needs a solution for accepting donations of varying amounts from the storefront.

There are two methods of accepting donations of varying amounts:

1. A $0 non-shippable product with product options as donation amounts
2. A $1 dollar non-shippable product with an option to change the quantity

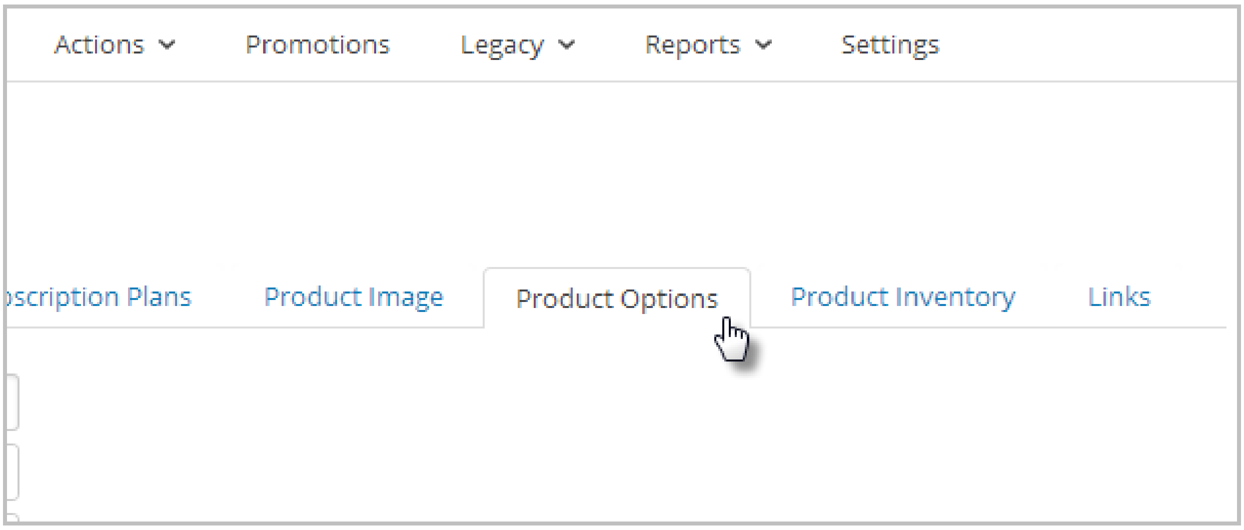
High Level Steps:

- Create a product that is priced at 0 dollars and set product options that act as donation amounts.
- Or create a product that is priced at 1 dollar with the option to increase the quantity of the donation product to increase their donation.

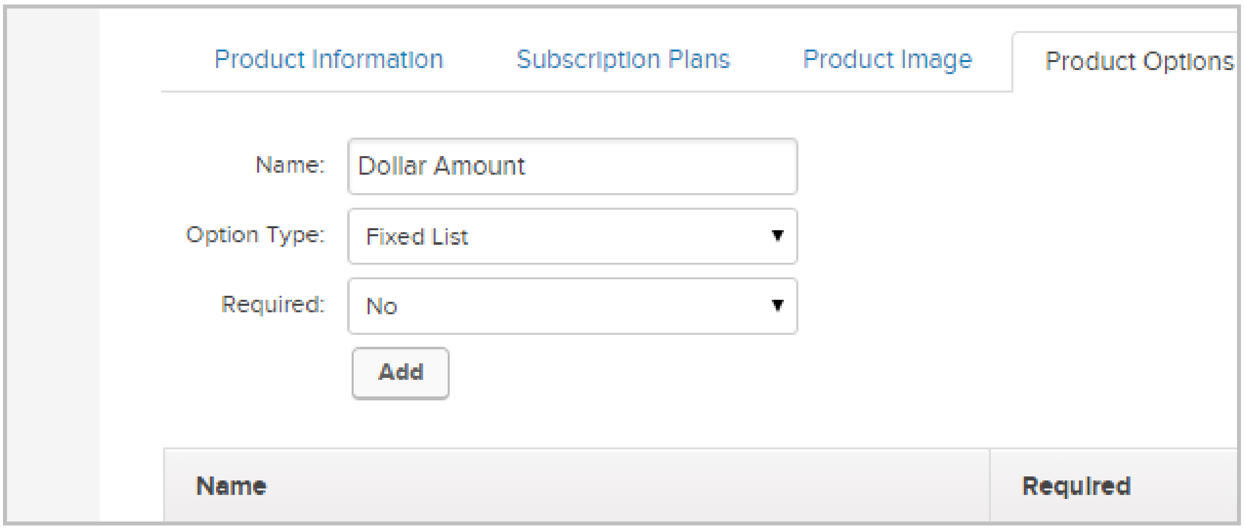
Steps for creating a $0 priced product and adding product options

1. Create a $0 product (i.e. $0.00). Don't know how to create a product, follow the steps in this article

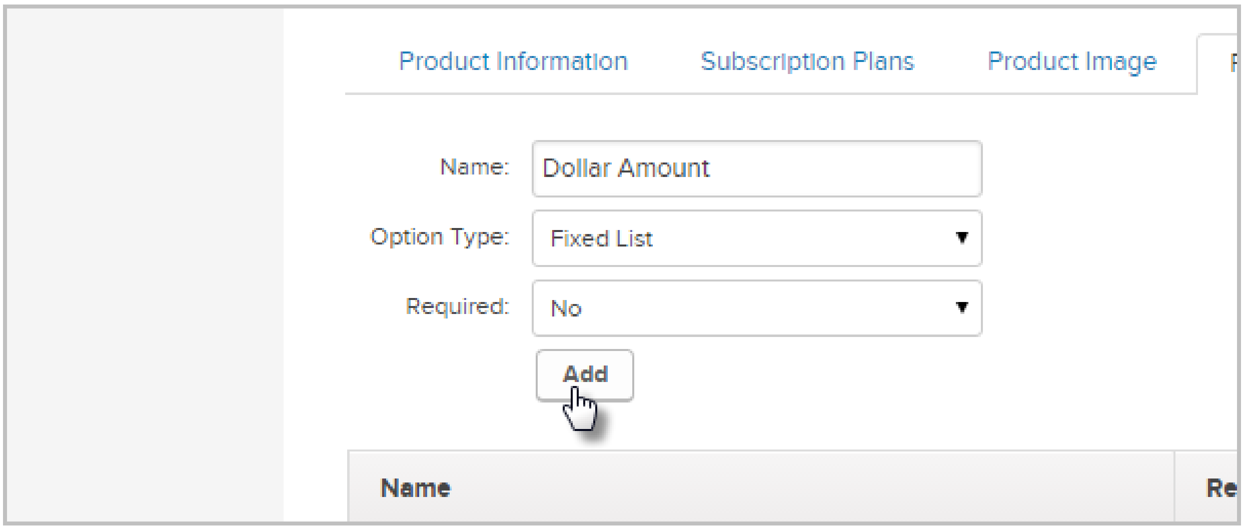
2. Go to **Product Options** Tab



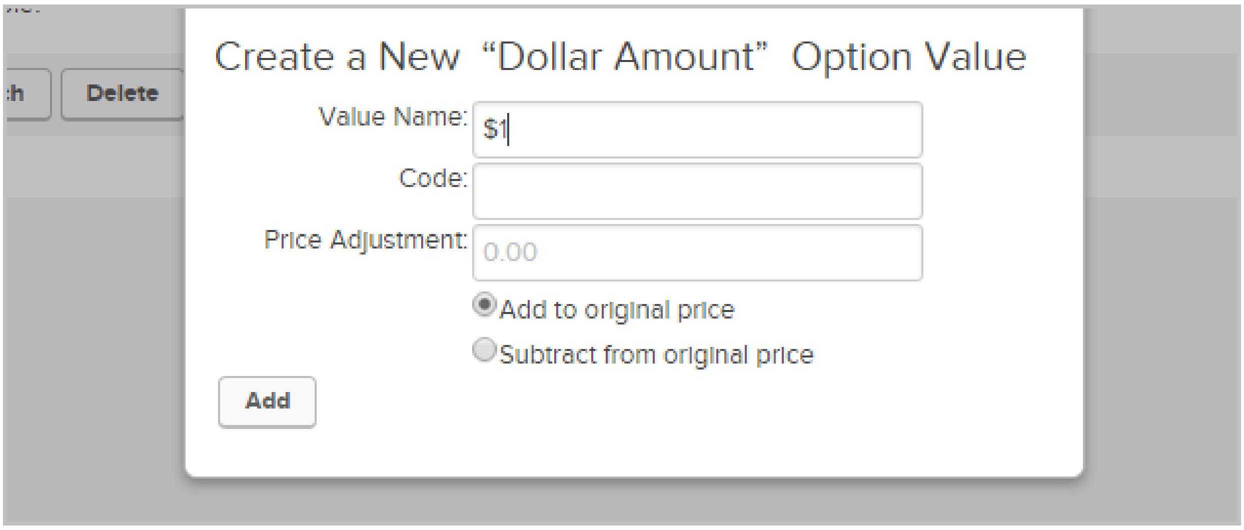
3. Type **Dollar Amount** for the name. Leave "Option Type" and "Required" unchanged



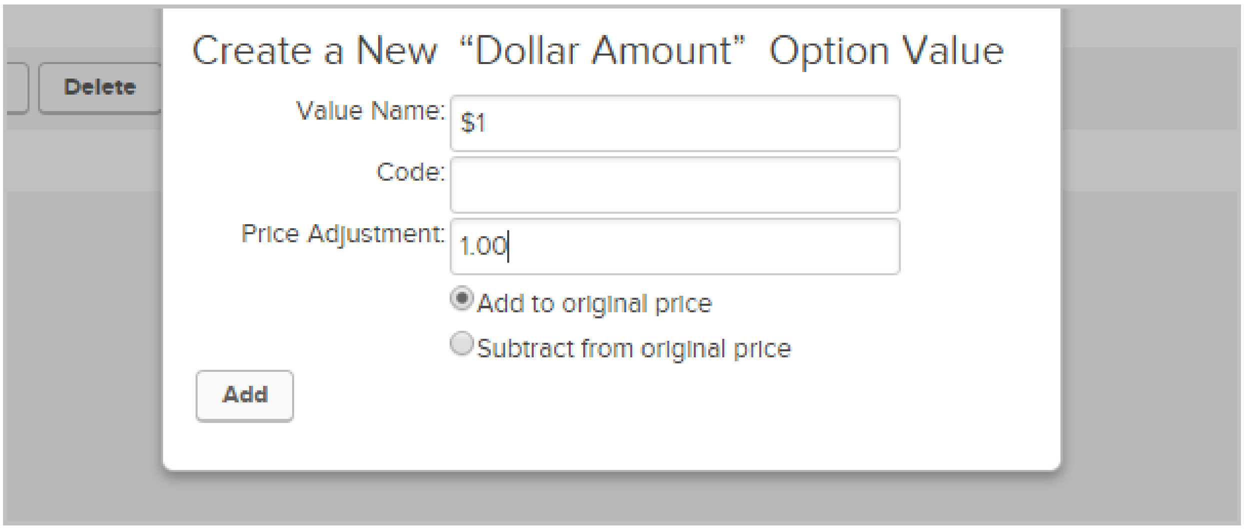
4. Click **Add**



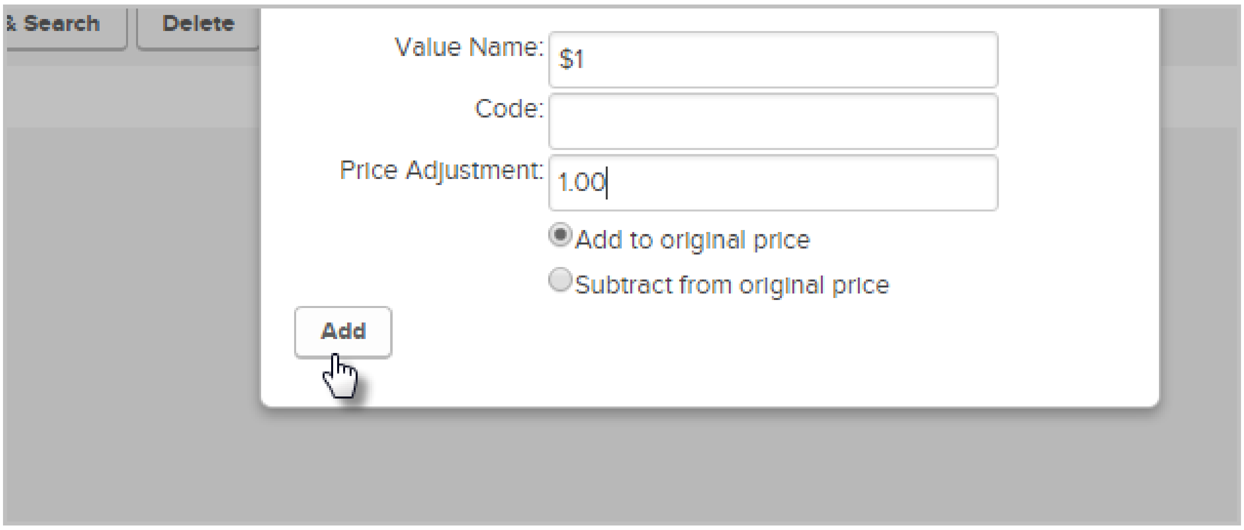
5. For "Value Name" type the actual price amount



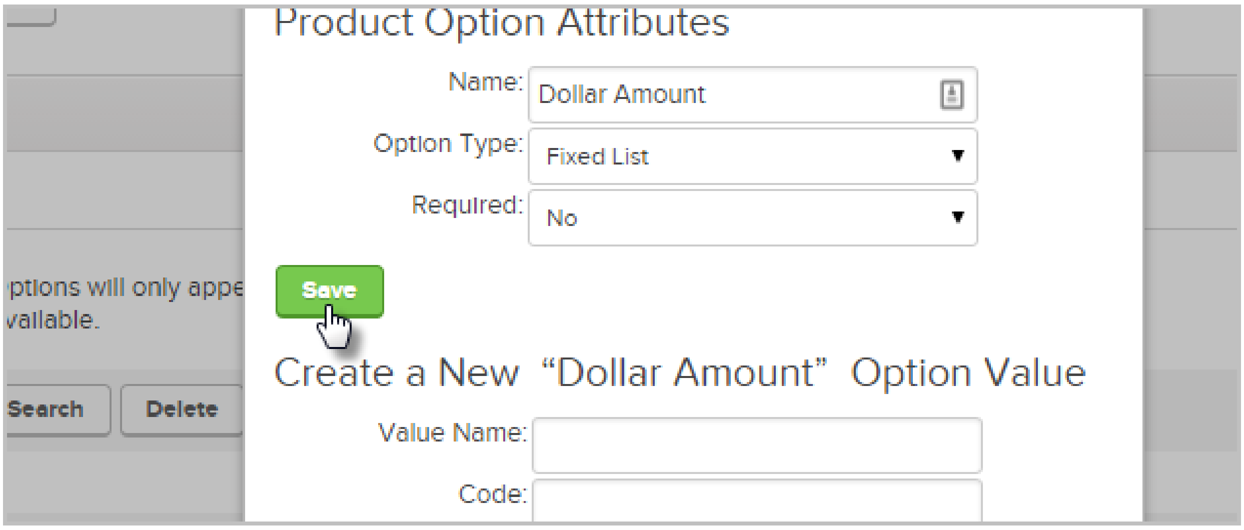
6. Type in the corresponding value for "Price Adjustment"



7. Click **Add**



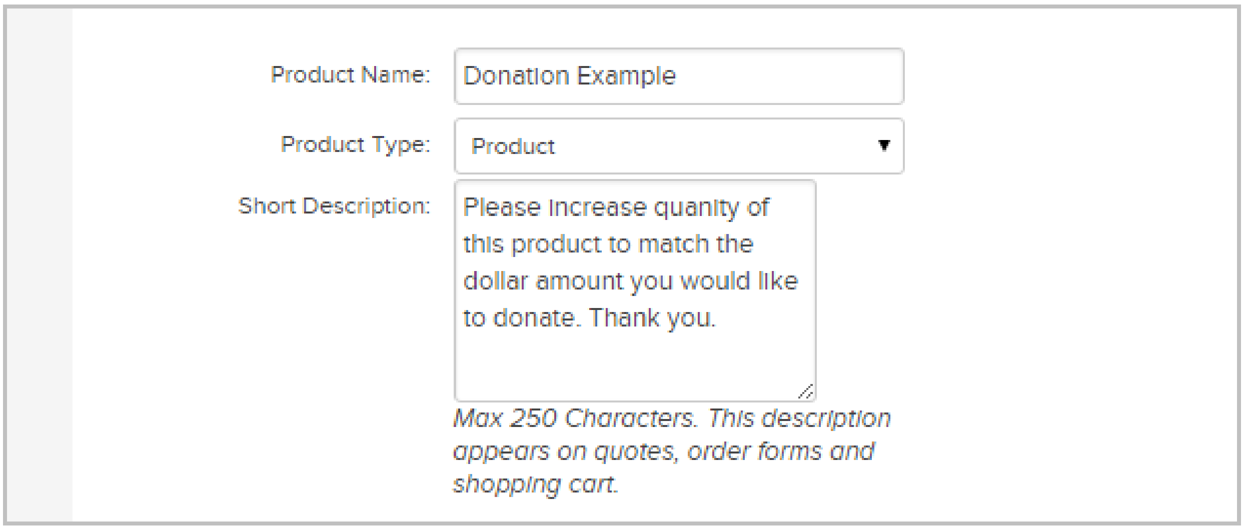
8. Click **Save** when all amounts have been added



Steps for creating a $1 product

1. Create a product and set the price to 1 (i.e. $1.00). Don't know how to create a product, not a problem, follow the steps in this article

2. Add to the product's short description box with instructions for the customer to update the quantity to be the dollar amount they would like to donate. For example "Please increase quantity of this product to match the dollar amount you would like to donate. Thank you" This will then show on the check out page for the customer to see.



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Understand The Shopping Cart And Storefront

Last Modified on 08/01/2018 3:50 pm MST

The Infusionsoft Shopping Cart is a method of selling products and / or services online. It has 2 components: a storefront and a shopping cart. The shopping cart functions independently of the storefront, giving you the option to create your own custom storefront on your website.

The Storefront

The storefront organizes and displays the goods you have for sale. The storefront includes navigation links so that potential customers can easily browse through your products to read descriptions and view pricing before they select an item for purchase. You can choose from several storefront themes to get you started. You can also customize the theme to match your branding. Using it is completely optional. You can also build a custom storefront on your website that links to the Infusionsoft shopping cart for checkout.

The Shopping Cart

The shopping cart provides an order summary, subtotal pricing (without tax or shipping), and collects the billing and shipping information. The shopping cart does not include storefront navigation, but does include an option to "continue shopping" that takes the buyer back to the store to select more products.

The shopping cart works well when you offer a variety of products and a customer is likely to purchase more than one at a time. A customer can purchase an unlimited number of items before checking out. It is also used to process orders initiated by your direct sales team through opportunities.

The shopping cart integrates with online payment processors. These companies handle the financial end of the transaction - validating the credit card, charging the order, and depositing the funds into your merchant bank account.

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Multi-Step Shopping Cart Option

Last Modified on 08/01/2018 3:50 pm MST

The Infusionsoft shopping cart has single-step and multi-step capabilities.

Single-step cart

This is the most common shopping cart type. It generally provides the easiest way for customers to check out quickly. Single-step purchase process:

1. Customers browse the storefront and add items to their cart.
2. They go to the checkout page to submit their order.
3. They enter their credit card and address information.
4. They preview and submit their order.

Multi-step cart

A multi-step cart requires the customer to sign in prior to checking out items in their cart. After they sign in, they will be able to use an existing card on file and will not need to re-enter their billing and shipping information. This could be beneficial if the majority of your customers are repeat buyers. Most people will not want to use a multi-step setup because it introduces friction in the purchasing process and may increase shopping cart abandonment rates.

Multi-step process:

1. Customers browse the storefront and add items to their cart.
2. Then they go to the checkout page to submit their order.
3. They sign in or create a new account.
4. If this is a new account, they enter their credit card and address information. If it's an existing account, they can skip this step
5. They preview and submit their order.

To switch between single-step and multi-step shopping carts...

1. Go to **E-Commerce > E-Commerce Setup** and click on the **Shopping Cart Settings** link.
2. Now, just select which checkout type you prefer.

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Set Up A Shopping Cart Theme And Thank You Page

Last Modified on 08/01/2018 3:51 pm MST

1. Go to **E-Commerce** > **E-Commerce Setup**
2. Go to **Design** and click on **Shopping Cart Themes**.
3. Click the **Create New Theme** button.
4. Choose the one or two column layout.
5. Choose from one of the default themes by clicking **Use this theme**. You can click on the image thumbnail to preview each theme.
6. Name your theme and click **Save**.
7. Now you can customize your theme by navigating to the various tabs.
    - **Images**: All of the default themes have a custom banner area. This is often used to

display a company logo in your Infusionsoft storefront and shopping cart. Click on edit to replace the default image with a custom image that is up to 960 pixels wide. The image is aligned to the left by default and displays above the cart header.

  - **HTML Areas**: Click on the HTML Areas tab to insert images and text into predefined areas of the storefront and shopping cart. HTML areas include header, footer, sidebar navigation, and more. View the diagrams to see where the area shows up on the storefront or cart and see code examples below for basic HTML directions. Click on the Preview button to view the change, and the Save button when you are finished.
  - **Labels**: Click on the Labels tab to customize the text labels in the storefront and shopping cart. Enter new label text, then scroll to the bottom of the page and click Save. In the example below, we change the word, "Products" to "Golf Accessories."

8. Click on the **Edit CSS** tab for more advanced customization. If you have a basic knowledge of CSS, the comments throughout the code will help you change the colors of the cart to match your branding. If you need help, you may need to contact your webmaster or check out the marketplace for a design consultant . Click Preview to view your changes and **Save** when you are finished.

9. The Appearance CSS controls the look and feel of the navigation, background, fonts, and more.
   - Top navigation and header
   - Left sidebar and main navigation (2 column layout)
   - Navigation (1 column layout)
   - Font color, size, and type
   - Background images and/or colors
   - Link behavior (e.g. color change on hover)
   - Category and product pages in the storefront
   - Cart and checkout pages in the shopping cart
   - Upsell boxes
   - Typography in the storefront and shopping cart
   - Link and button appearance throughout the storefront and cart
   - Footer display

10. The Layout CSS allows you to customize the size and positioning of the various storefront and shopping cart elements, including:
    - Top navigation and header
    - Left sidebar and main navigation (2 column layout)
    - Navigation (1 column layout)
    - Category and product pages in the storefront

- Cart contents in the shopping cart
- Form fields and labels
- Table displays
- Containers
- Forgot Password
- Upsells
- Typography in the storefront and shopping cart
- Link and button appearance throughout the storefront and cart
- Footer
- HTML Areas
- Settings

11. Click on the **Settings** tab to configure optional settings.
    - **Hide Promo Code**: If you do not offer promo code discounts, mark this checkbox to hide it from the shopping cart checkout page.
    - **Hide "Continue Shopping" Label**: Mark this checkbox if you do not want customers to go back to your storefront during the purchase process.
    - (Optional) **Continue Shopping URL**: The continue shopping button takes customers back to the Infusionsoft storefront by default. Enter a custom storefront URL if you created a storefront on your website instead of using the Infusionsoft storefront.
    - (Optional) **Thank You URL**: Infusionsoft provides a default thank you page with a purchase confirmation summary. Enter a custom web page URL if you have created a custom thank you message on your own website.
    - **Finished URL**: This setting only applies if you are using the Infusionsoft default thank you page (above.) Enter a finished URL to direct customers back to your website after the purchase process is completed.

12. After you save the custom theme, it will show up in the *Shopping Cart Themes* area. Click on the **Use Theme** link under the theme thumbnail to set it as the default shopping cart theme.

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Integrating The Infusionsoft Storefront With Your Website

Last Modified on 08/01/2018 3:51 pm MST

There are two methods of integrating the Infusionsoft shopping cart with your existing website:

- You can utilize Infusionsoft's storefront and shopping cart checkout for a quick, end-to-end solution. You will just need to style your shopping cart theme to match your website.
- If you have a custom storefront, you can utilize Infusionsoft's product links. Just add the product links to your existing storefront and let Infusionsoft take care of the checkout process.

1. To get your storefront link, go to **E-Commerce > E-Commerce Setup**
2. Go to the *Design* section and click on **Shopping Cart Themes**.
3. Click on a thumbnail to preview the theme; this is the URL of your shopping cart storefront.
4. Copy the URL from the browser address bar and use it in your website or send it to your webmaster along with instructions about where you want to use it.

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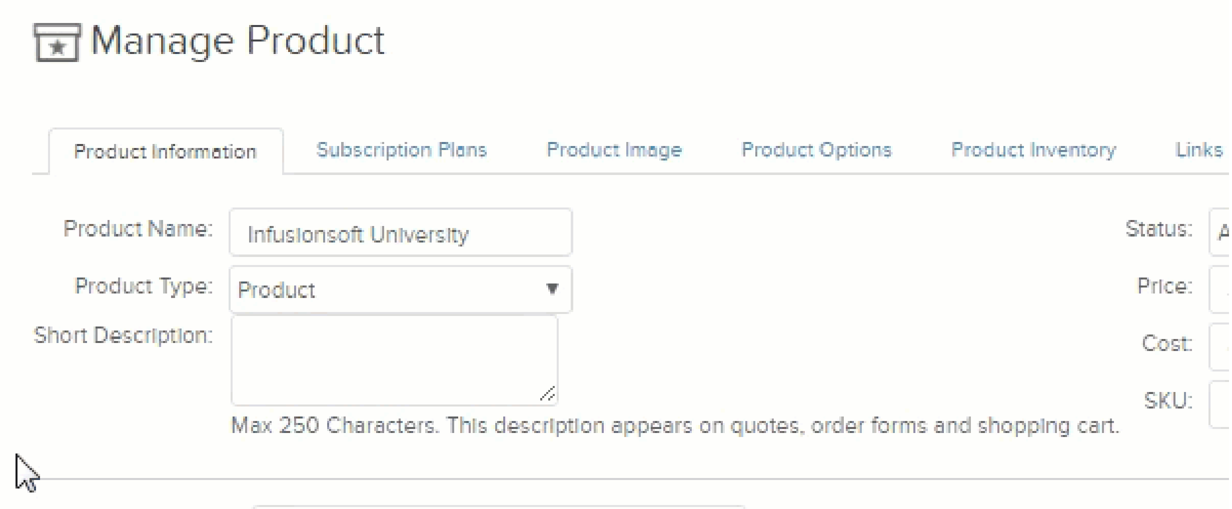
Add Shopping Cart Purchase Links To Your Website

Last Modified on 08/01/2018 3:51 pm MST

If you build a custom storefront on your website instead of using the Infusionsoft storefront, you will use product links to send customers to the Infusionsoft shopping cart to check out page. The product links are used with "Buy Now" or "Add to Cart" buttons or links. They can also be used in emails and posted to social media. Product links use the default shopping cart theme you selected through **E-Commerce Setup** > **Design**.

1. To get your product links, Go to **E-Commerce** > **Products**
2. Click on the name of a product.
3. Click on the **Links** tab. There is a separate link for each purchase method (one-time and / or subscription plans.)



4. The Link URL looks something like this... https://yourapp.infusionsoft.com/app/manageCart/addProduct?productId=119&subscriptionPlanId=33
   - The Product ID changes for each individual product.
   - The Subscription Plan ID shows up when the product is billed on a recurring interval (eg. monthly subscription, annual subscription.)

5. Click on the link to preview the product in the shopping cart.*(Optional)*

6. Click on the **Copy** button to save a product link to your clipboard. Send this link to your webmaster or use it to create a product link in your website.

7. Example Website Code

When you add the link to the HTML code in your website, it will something like this:

```
Add to Cart
```

The buyer only sees the Add to Cart hyperlink.

When using an image, the code will look something like this:

```
▫
```

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Create A Product Bundle Link

Last Modified on 08/01/2018 3:52 pm MST

If you commonly sell groups of products together, you can create product bundle links to make it easier for customers to purchase the product package. The product bundle links add multiple items to the shopping cart with one click; however, they do not apply a discount by default (the price is the sum of the prices of the products in the package). You will need to set up a promo code discount to use in conjunction with the product bundle links if you want to offer a discount. Product Bundle Links can be put on your website or can be included in an email you send to prospects.

Please note! The Product Bundle Links that you create are not saved in Infusionsoft for future reference. If you stop using one and forget the link URL, you'll need to rebuild the Product Bundle Link in Infusionsoft.

1. Go to **E-Commerce > E-Commerce Setup**
2. Go to *Products* and click on **Product Bundle Links**.
3. Type the name of a product into the search box and click on its name to select it. Note: If the product is sold as a one time product and a subscription or has multiple subscription plans, select the purchase method from the Subscription Plan drop-down.
4. Click the **Add To Bundle** button. Repeat these steps to add more products to the bundle.
5. Review the items in the bundle and increase the quantity if the bundle includes more than one of any products.
6. (Optional) Checkout Type. The bundle uses the default cart checkout type (Single-Step or Multi-Step.) Select a checkout type from the drop-down if you want to override the cart default. Note: Single step has lower cart abandonment rates.
7. (Optional) Promo Code. Select a promo code from the drop-down to apply a discount to the product bundle link. Note: The promo code discount must be setup through **E-**

Commerce > Promotions.

8. (Optional) Don't allow these products or subscriptions to be removed from the cart. Mark this checkbox if you want to hide the remove links on the checkout page. This means the customer cannot remove any of the products in the bundle and checkout with a partial order.

9. (Optional) Remove all other products from the cart when this link is clicked. Mark this checkbox if you want to clear all of the current items in the cart if the link is clicked. This might apply if you sell 3 products individually or as a bundle. If the customer clicks on the bundle link, you'd want to remove all of the individual items from the cart to avoid duplication.

10. The product bundle link is displayed at the bottom of the page.

11. Click on it to verify it is correct.

12. Click on **Copy** to save the URL to your clipboard.

13. Send this link to your webmaster or add it to your website yourself.

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Shopping Cart SEO

Last Modified on 08/01/2018 3:52 pm MST

You are able to use Google Webmaster Tools to monitor search, click-through, and incoming link activity for your Infusionsoft Shopping Cart. When you set up Google Webmaster Tools, you will need to verify site ownership. Google will provide you with a meta-tag that you must paste into Infusionsoft prior to completing the verification process.

Read more about Google Site Verification .

1. To verify site ownership, go to **E-Commerce** > **E-Commerce Setup**
2. Go to the *Promotions* section and click on **SEO Tools.**
3. Go to the *Google Webmaster Tools Verification* section.
4. Click on **Take me there** to log into your Google Webmaster account and get the Google Meta Tag.
5. In the Google Webmaster Tools site, click on **Add a Site**.
6. Enter the URL of your shopping cart storefront. Just change the part highlighted in yellow to your Infusionsoft account name: https://qg106.infusionstest.com/app/storeFront/showStoreFront/
7. Click on the **Alternate Methods** tab and select **HTML tag.**
8. Keep the Google Webmaster Tools site open, but go back to Infusionsoft and paste the Meta Tag code into the *Google Provided Meta Tag* field.
9. **Save** the change.
10. Go back to the Google Webmaster Tools site and click on **Verify** to complete the process.
11. To publish a storefront/shopping cart sitemap. (Optional) If you are using the

Infusionsoft Storefront, you can publish a site map to Google, Yahoo, and Bing. The sitemap includes both storefront and shopping cart links. If you are not using the Infusionsoft storefront, you should skip this step since you do not want to drive search traffic to those pages. Go to the Sitemap section and click on the link provided to publish the sitemap.

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Shopping Cart URL Parameters

Last Modified on 08/01/2018 4:12 pm MST

Add a product to a cart

Just change the highlighted portion to point to your app and to set your parameters. You can combine parameters with "&" as shown in the URL below.

Example: https://martyc.infusionsoft.app/app/manageCart/addProduct?productId=125&quantity=2

Parameter Name	Description	Required
productId	The id of the product to add the cart.	Y
subscriptionPlanId	The id of the subscription plan that is being sold.	N
quantity	The quantity of the product being added.	N (defaults to 1)
productOptionId	A comma separated list of all of the product options that are being added.	N
productOption	The selected options, this is the id of the option value for fixed list and the text for a variable option. Must match the productOptionId parameter in length and order.	N

Processing a bundle through the cart

Just change the highlighted portion to point to your app and to set your parameters. You can combine parameters with "&" as shown in the URL below.

URL:
https://martyc.infusionsoft.com/app/manageCart/processBundle?clearCart=true&executionMode=PRODUCT_TARGETED&productId=90

Parameter Name	Description	Required
productId	A comma separated list of all of the product ids that are being added to the cart.	Y (if no subscriptions)
productQuantity	A comma separated list of the quantities for the products being added. Must match the order and number of product ids submitted.	Y (if products are submitted)
productOptions	Supports legacy links that submit product options. A comma separated list that matches the following format (productId_productOptionId_productOption)	N
subscriptionPlanId	A comma separated list of subscription plans that are being added to the cart. This list is separate from the product ids,	Y (if no products)
subscriptionPlanQuantity	The quantities for the subscription plans being submitted. Must match the order of the subscription plan ids being submitted.	Y (if subscriptions are submitted)
promoCode	A promo code to apply to the cart.	N
checkoutMethod	The checkout method to use (singleStep vs multipleStep)	N
executionMode	Used to lock down certain parts of the cart.	N
clearCart	Whether or not to clear the settings in the cart. (true vs false)	N (defaults to false)

Parameter Name	Description	Required
cartSkinId	The id of the cart skin to use when rendering the cart. If it is omitted than the default cart look and feel is used (either style or cart skin)	N
styleThemeId	The id of the style to use when rendering the cart. If it is omitted than the default cart look and feel is used (either style or cart skin)	N

Fields that are captured by the shopping cart and will populate the shipping and billing information

Note: All of the Contact0 files are translated automatically to match the below listed parameters. So Contact0FirstName is translated to: inf_field_FirstName.

Parameter Names

- inf_field_FirstName
- inf_field_MiddleName
- inf_field_LastName
- inf_field_Company
- inf_field_StreetAddress1
- inf_field_StreetAddress2
- inf_field_City
- inf_field_State
- inf_field_PostalCode
- inf_field_Country
- inf_field_Phone1
- inf_field_Email
- inf_field_Address2Street1
- inf_field_Address2Street2
- inf_field_City2
- inf_field_State2
- inf_field_PostalCode2
- inf_field_Country2

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Promo Codes and Other Discount Criteria

Last Modified on 08/02/2018 1:51 pm MST

In most cases, you want to set up a set of conditions a customer or an order must meet to qualify for a discount, trial, upsell, or pay plan. The criteria options are the same for each type of promotion and can be used in combination with one another. When you set up more than one criteria, they **all** must be met for the customer to be eligible for the promotion.

First, you will define a set of criteria for each promotion and define how they work together to apply the discount, trial, upsell, or pay plan.

Example:
Goal: Get customers to spend at least $90 net on each purchase during the month of June. Make the offer feel exclusive for the people on my newsletter list by offering a promo code.
Promotion: Order Total Discount - receive 10% off of the total purchase after other discounts have been applied (Net.)
Criteria: (all must be true)

- Purchase between June 1, 2011 and July 1, 2011 (Date Range)

AND
- Order Total is greater than $100
  AND
- NLCUST promo code is entered during checkout

Date Range

This criteria sets a fixed date range during which the customer must purchase in order to qualify for a promotion or pay plan. You set up a start date and end date. The promotion automatically expires after the end date passes. Date range criteria help you increase urgency, which can often lead to faster purchase. This option does not set up a rolling date range (e.g., within the next 30 days.)

Promo Code

This criteria requires a customer enter a specific promo code while checking out through your shopping cart or order form. Promo codes can be a great way of tracking where the purchase originated (i.e. email offer, print ad, mailer, etc.) and foster a sense of exclusivity. Note: Promo codes are text-case sensitive.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

Product / Qty

This criteria requires a customer purchase a certain number of a specific product. You can use this option to set up volume pricing discounts and / or to run a special on overstocked or discontinued products.

Subscription Program

This criteria requires a customer sign up for a specific subscription program. This can increase interest in a subscription program, and /or encourage the customer to purchase a recommended product/subscription program combination.

Order Total

This criteria requires a customer to spend a minimum amount of money on products (not including taxes, shipping, or subscription programs). It can be used to increase the dollar value of each purchase by encouraging customers to purchase products with a larger profit margin.

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Order Total Discount

Last Modified on 08/20/2018 3:28 pm MST

Order total discounts deduct a percentage of the purchase total (e.g. 20% off) or a fixed dollar amount (e.g. $10.00 off). Order total discounts apply to all products in the cart excluding tax and shipping.

When there are multiple discounts in force, you can determine whether the system applies the discount to the gross total (before other discounts) or to the net total (after other discounts have been deducted).

Note: *If you also want to require a minimum dollar value for the purchase, you will set that up as a criteria.*

Order total discounts are displayed as an additional discount in the Infusionsoft shopping cart and order forms.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to **E-Commerce** > **Promotions**

2. Select **Order Total Discount** from the drop-down.

3. Enter the following details...
   - **Name**: The name shows up for customers and Infusionsoft users. It should be short but descriptive (e.g. 20% off June Purchases.)
   - **Description**: The description shows up for customers in the order summary section of the shopping cart and order forms. It can further describe the discount benefits.
   - **Payment Type**: This determines the total used to calculate the discount.
     - Select **Gross** if you want to apply the discount on the total purchase BEFORE other applicable discounts have been applied.
     - Select **Net** if you want to apply the discount to the remaining total AFTER other discounts have already been applied.
   - **Type**: This determines the method of calculation.
     - Select **Percent** if you want to set up a variable discount that is calculated by multiplying the order total by a percent (e.g. .20 for 20%.)
     - Select **Amount** if you want to set up a fixed discount that does not change based on the dollar value of the order. The discount is the same for every purchase, as long as they meet your specified criteria.
   - **Amount**: This is the numerical value for the percent or fixed amount discount.
   - **Discount Referral Partner Commissions**: Set to *Yes* if you want to base referral partner commissions on the discounted pricing instead of calculating the referral payout on the full price of the product. This only applies if you are using the Referral Partner component and have set up percent commissions for one or more commission program.

4. **Save** the discount.

5. Enter Criteria. The criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

6. Select a criteria type from the drop-down: Date Range, Promo Code, Product / Qty, Subscription Program, Order Total

7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

8. **Save** the criteria.

9. **Save** the discount.

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Product Specific Discount

Last Modified on 08/02/2018 1:52 pm MST

The Product Specific discount is applied to the price of a specific product. It can be applied as a percentage or fixed dollar amount. By default, a customer is eligible for a Product Specific discount as long as the sale product is in the shopping cart, but you can also set up additional criteria to define more eligibility requirements.

The product discount will be displayed below the product in the Infusionsoft Shopping Cart and order forms.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to **E-Commerce > Promotions**
2. Select **Product Specific Discount** from the drop-down.
3. Enter the following details...
    - **Name**: The name shows up for customers and Infusionsoft users. It should be short but descriptive (e.g. Lil Slugger Bat Discount.)
    - **Description**: The description shows up for customers in the order summary section of the shopping cart and order form. It can further describe the discount benefits.
    - **Product**: Select a product from the drop-down. This product will be discounted when it is added to an order, and any additional criteria are met.
    - Type: This determines the method of calculation.
        - Select **Percent** if you want to set up a variable discount that is calculated by multiplying the order total by a percent (e.g. .20 for 20%.)
        - Select **Amount** if you want to set up a fixed discount that does not change based on the dollar value of the order. The discount is the same for every purchase, as long as they meet your specified criteria.
    - **Amount**: This is the numerical value for the percent or fixed amount discount.
    - **Discount Referral Partner Commissions**: Set to *Yes* if you want to base referral partner commissions on the discounted pricing instead of calculating the referral

payout on the full price of the product. This only applies if you are using the Referral Partner component and have set up percent commissions for one or more commissions program.

4. Click **Save** to save the Discount.

5. Enter Criteria. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

6. Select a criteria type from the drop-down: Date Range, Promo Code, Product / Qty, Subscription Program, Order Total

7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

8. **Save** the criteria.

9. **Save** the discount.

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Shipping Discount

Last Modified on 08/02/2018 1:52 pm MST

The shipping discount is applied to the shipping price for an order. It applies a percentage or fixed dollar discount to the shipping total, when specific criteria are met.

Shipping discounts are displayed on the order summary page, after the customer selects a shipping preference.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to **E-Commerce** > **Promotions**

2. Select **Shipping Discount** from the drop-down.

3. Enter the following details...
    - **Name**: The name shows up for customers and Infusionsoft users. It should be short, but descriptive (e.g. 10% Off Shipping Special.)
    - **Description**: The description shows up for customers in the order summary section of the shopping cart and order forms. It can further describe the discount benefits.
    - **Type**: This determines the method of calculation.
        - Select **Percent** if you want to set up a variable discount that is calculated by multiplying the order total by a percent (e.g. .20 for 20%.)
        - Select **Amount** if you want to set up a fixed discount that does not change based on the dollar value of the order. The discount is the same for every purchase, as long as they meet your specified criteria.
    - **Amount**: This is the numerical value for the percent or fixed amount discount.

4. **Save** the discount.

5. Enter Criteria. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

6. Select a criteria type from the drop-down: Date Range, Promo Code, Product / Qty, Subscription Program, Order Total
7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)
8. **Save** the criteria.
9. **Save** the discount.

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Create a Free Trial Promotion

Last Modified on 08/02/2018 1:53 pm MST

A subscription free trial delays the first charge of a recurring billing program so you can use a free trial period to eliminate the purchase barrier by providing a "try before you buy" offer. The customer does not get billed immediately, but is required to enter credit card information during the purchase. When the trial expires, Infusionsoft will automatically bill the first charge and every charge thereafter, until the program is canceled. You define the number of free trial days along with any other eligibility criteria.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to **E-Commerce > Promotions**
2. Select **Subscription Free Trial** from the drop-down.
3. Enter the following details...

- **Name**: The name only shows up for your users. It should be short but descriptive (e.g. 30 Day Free Trial.)
- **Description**: The description shows up for customers in the order summary section of the shopping cart. It can further describe the discount benefits.
- **Subscription Plan**: Select a subscription plan from the drop-down.
- **Free Trial Days**: Enter a number of days to delay the first billing for the subscription program. This number will show up on the shopping cart summary.
- **Hide Price**: Choose Yes if you do not want the subscription program price and billing cycle displayed in the shopping cart order summary along with the free trial days.

4. Click **Save**.

5. Enter Criteria. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

6. Click on the **Add Criteria** drop-down.

7. Select a criteria type: Date Range, Promo Code, Product / Qty, Subscription Program, Order Total

8. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

9. **Save** the criteria.

10. **Save** the discount.

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Product Category Discount

Last Modified on 08/02/2018 1:53 pm MST

The product category discount is applied to an entire product category(e.g. books) or combination of categories (e.g. books and cds). It applies a percentage discount to the total price of the eligible products in the shopping cart and order form, when specific criteria are met.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

Before you can offer a product category discount, you must:

- Add product categories and (optional) sub categories
- Assign each product to a category and (optional) sub category

1. Go to **E-Commerce >Promotions**

2. Select **Category Discount** from the drop-down.

3. Enter the following details:
    - **Name**: The name shows up for customers and Infusionsoft users. It should be short but descriptive (e.g. 20% Book Purchases.)
    - **Description:The** description shows up for customers in the order summary section oft he shopping cart and order form. It can further describe the discount benefits.
    - **Percent**: Enter a numerical value for the discount percentage (e.g. 20%.)
    - **Discount Referral Partner Commissions**: Set to Yes if you want to base partner commissions on the discounted pricing instead of calculating the referral partner payout on the full price of the product. This only applies if you are using the Referral Partner component and have set up percent commissions for one or more commission programs.
    - **Categories**: Mark the checkbox(es) beside one or more product category and/or sub category to include them in this discount.

4. **Save** the Discount

5. Enter Criteria. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

6. Select a criteria type from the drop-down: Date Range and Promo Code.

7. Enter the specific criteria parameters (i.e. start/end date or code)

8. **Save** the criteria.

9. **Save** the discount.

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Create an Upsell

Last Modified on 08/02/2018 1:53 pm MST

An upsell offer is used to encourage a customer to add more products before they check out. The upsell may highlight a companion product to one the customer has already selected, or draw attention to related products. An upsell offer appears when specific criteria are met. The upsell product most often has a discounted price designed to prompt the customer to "buy today." The criteria you define when you set up the upsell determines when customers see the upsell offer in the cart.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

1. Go to **E-Commerce > Promotions**
2. Select **Upsell** from the drop-down.
3. Enter the following details...

- **Name**: The name shows up Infusionsoft users. It should be descriptive, summarizing the offer details.
- **Upsell Product**: Select a product from the dropdown. This is the product you want to highlight on the checkout page, based on the criteria you set up.
- **Type**: Select the link type from Checkbox or Add to Cart Button. This determines what the customer will click to add the product to the cart.
- **Description**: The description shows up in the order summary. Please note that this feature is only available if you are using legacy e-commerce features.
- **Upsell Price**: Enter the special offer price. The upsell will display both the regular price and the special price.
  Save the Upsell.

4. Enter Criteria. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount.

5. Select a criteria type from the drop-down: Date Range, Promo Code, Product / Qty, Subscription Program, Order Total

6. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

7. **Save** the criteria.

8. **Save** the upsell.

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Testing Your Promotions And Upsells

Last Modified on 08/02/2018 1:54 pm MST

It is a good idea to test your discount, trial, upsell and pay plan promotions after you set them up. If a promotion is not working as you expect, check its criteria. Remember ALL of the criteria you create must be true for the promotion to work. In some cases, you may need to create multiple versions of the same promotion to achieve your goals.

Before you test a shopping cart promotion, you should write down the following information about each promotion:

- Type of Promotion: Discount (order total, product, subscription, category, or shipping), free trial, upsell, or pay plan.
- Name of the eligible Product, Subscription, or Category (if applicable).
- Criteria: What must be true for the customer to be eligible to receive the promotion (i.e. date range, promo code, product / qty, etc.)
- Expected Result. (e.g. "When the customer spends 100.00 and enters the NLCUST promo code, they will get 10 % off their order total.)

1. Go to **E-Commerce > E-Commerce Setup**

2. Go to the *Products* section and click on **Product Bundle Links**.

3. Create various bundle links to add a product, a subscription, or various combinations to your cart.
    - If there is a minimum order total involved, increase the number of products in the cart to get to that total.
    - If there is a promo code criteria, enter the promo code and then click on Apply.
    - If there is a date range criteria, the offer won't show up unless the day you test falls within the date range. You will have to temporarily modify the date range to test.

4. Remove items from the cart before testing another promotion.

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One Click Upsell After A Purchase

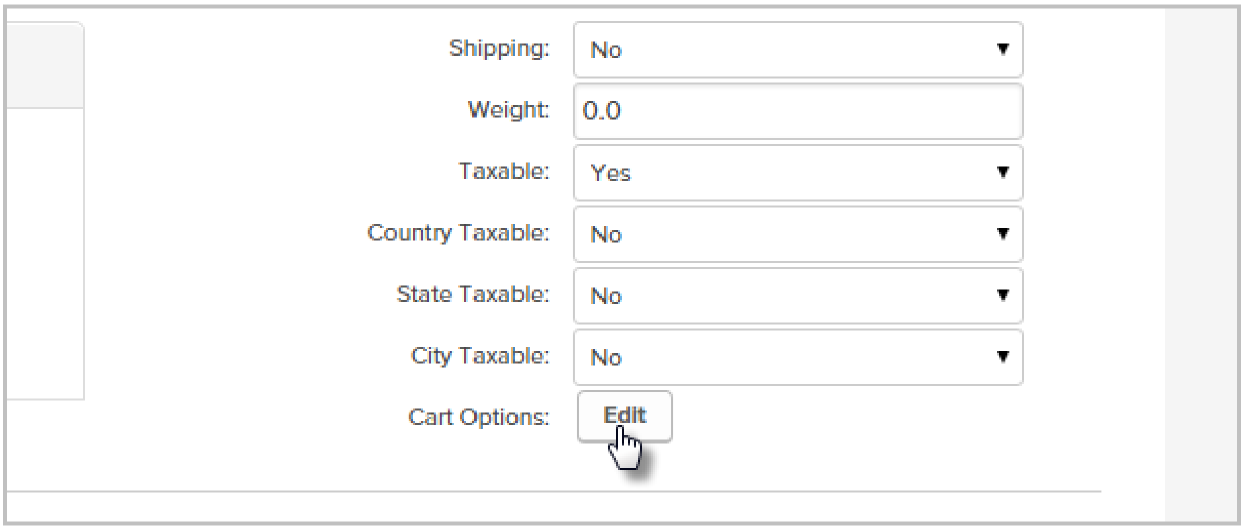
Last Modified on 08/02/2018 1:54 pm MST

There are two methods for creating a one-click upsell after a purchase is made:

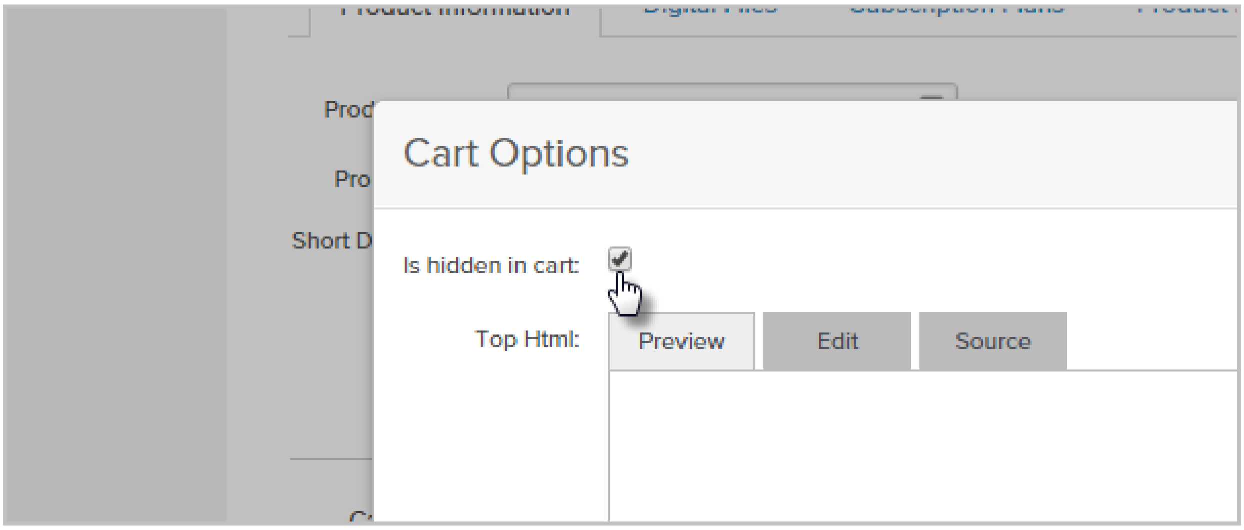
- You can purchase a one-click upsell add-on product from one of our marketplace vendors. Click this link to view all one-click upsell addons.
- Follow the instructions in this article. Please note that setting up a one-click upsell after a purchase is made is not an inherent feature in Infusionsoft and requires more intensive setup procedures

Please Note! This does not work for PayPal orders. This only works with Order Forms.

1. First, create all of the necessary products (including the upsell product.) You can reference this article to walk you through the process. If you use the shopping cart storefront, you may want to make your upselll product hidden.
   To do this, click the **Edit** button on the Product Information tab

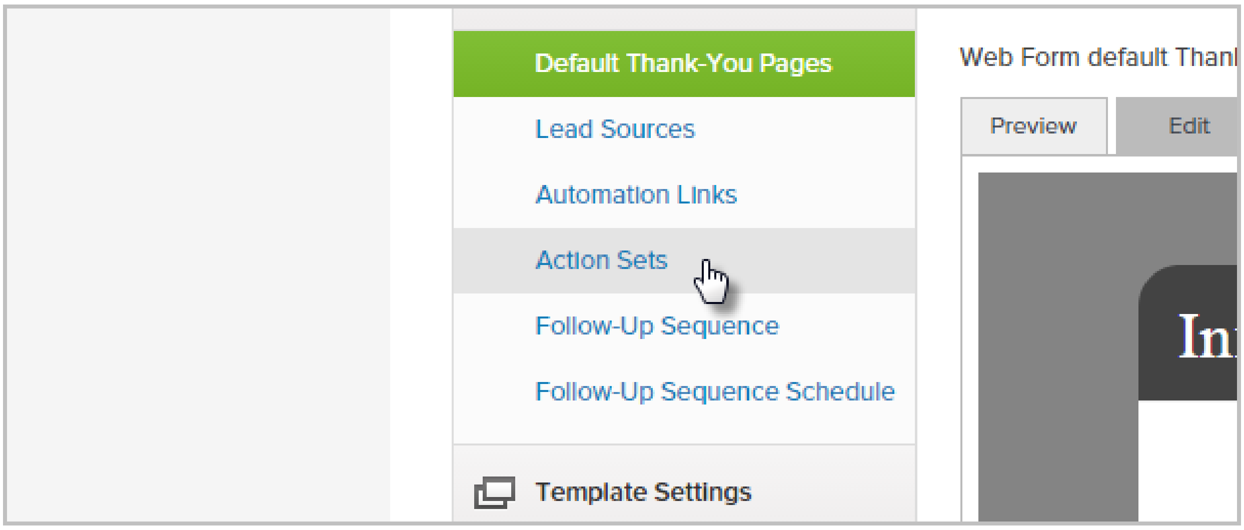
   Then check the **Is hidden in cart** box.



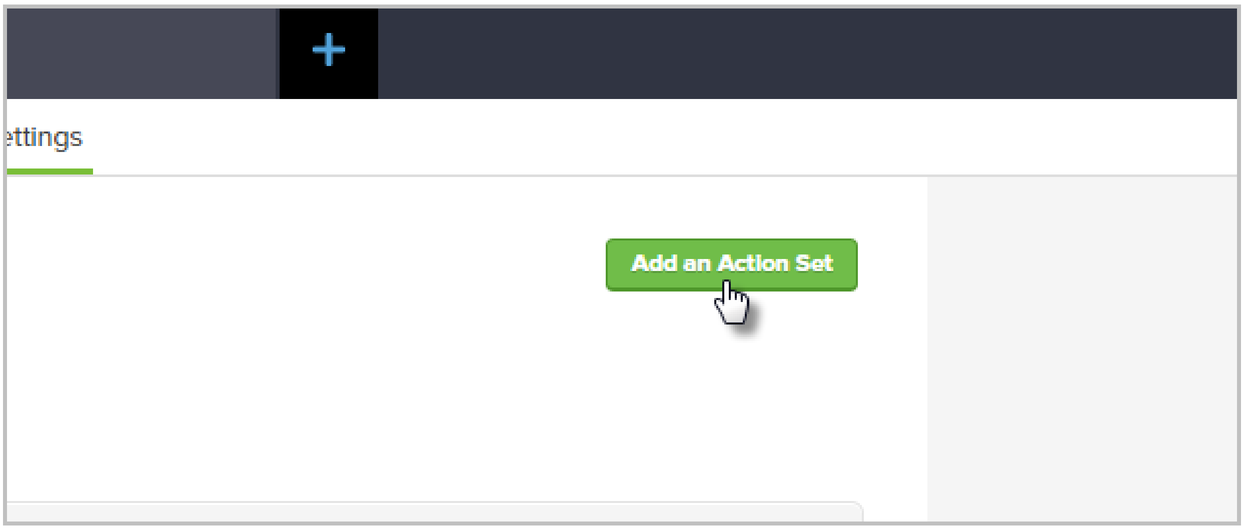
2. Set up the order form for the initial purchase. If you need help setting up an order form, click here . Those articles have setup videos that will show you how to set up an order form and order form theme.

3. Set up the legacy action set that will create the order. This is a legacy feature and is not documented in the Help Center. Below you'll find step-by-step instructions.
    1. Go to **Marketing** > **Settings**

    2. Click **Action Sets**

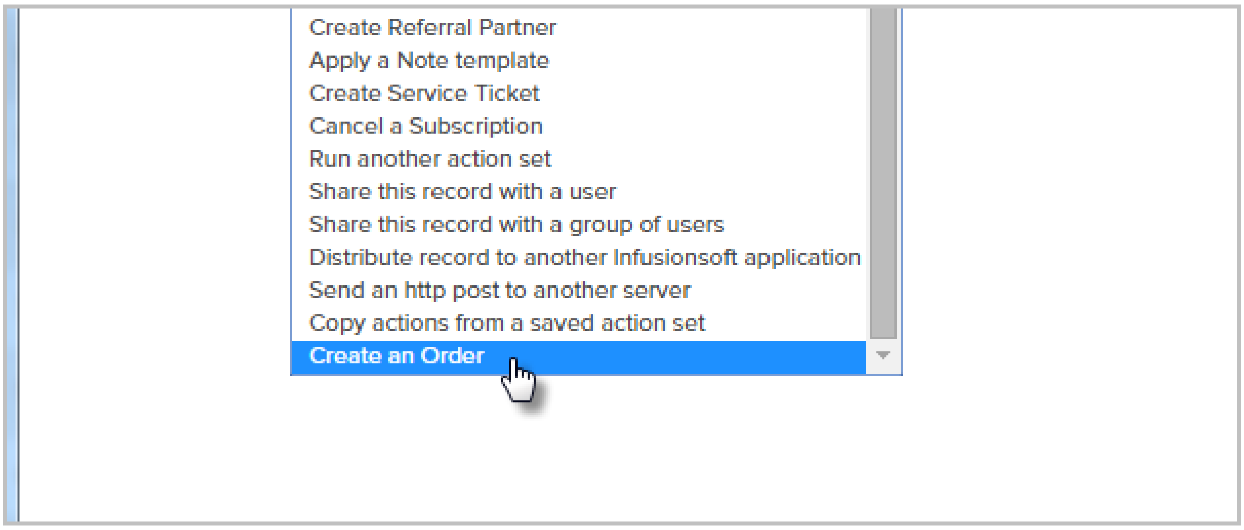


    3. Click **Add an Action Set**

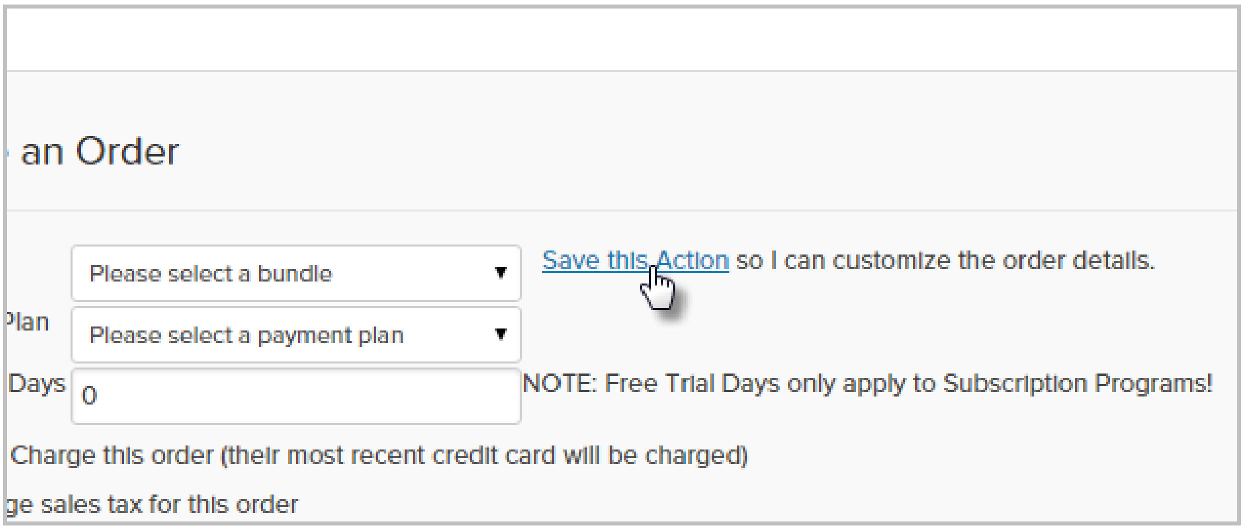


4. Name the Action Set whatever you wish (e.g., "Upsell Purchase")

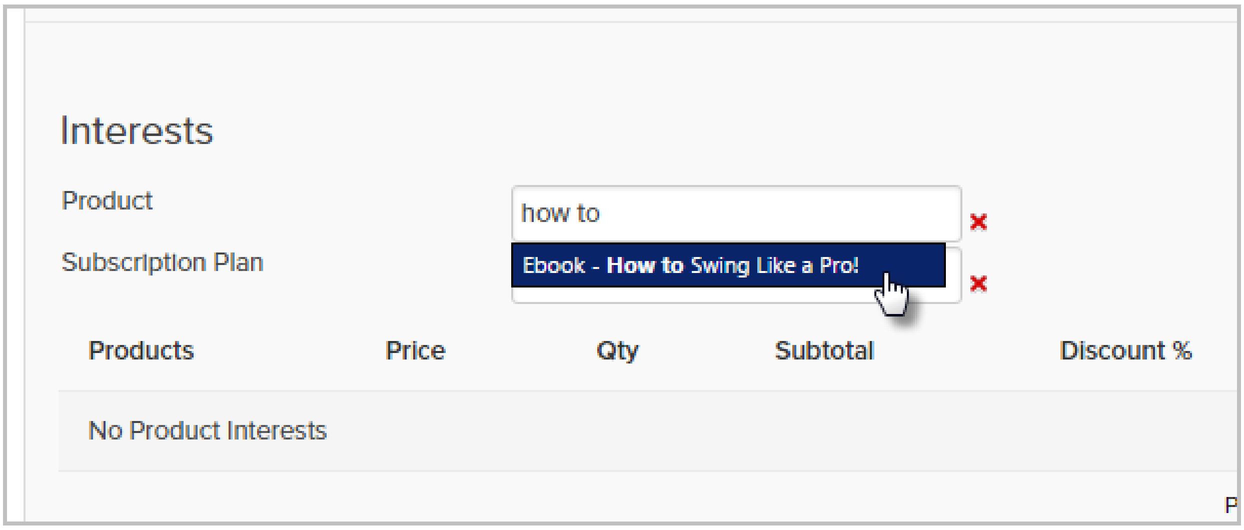
5. Select the **Create an Order** action from the drop-down (it's the last option in the menu)



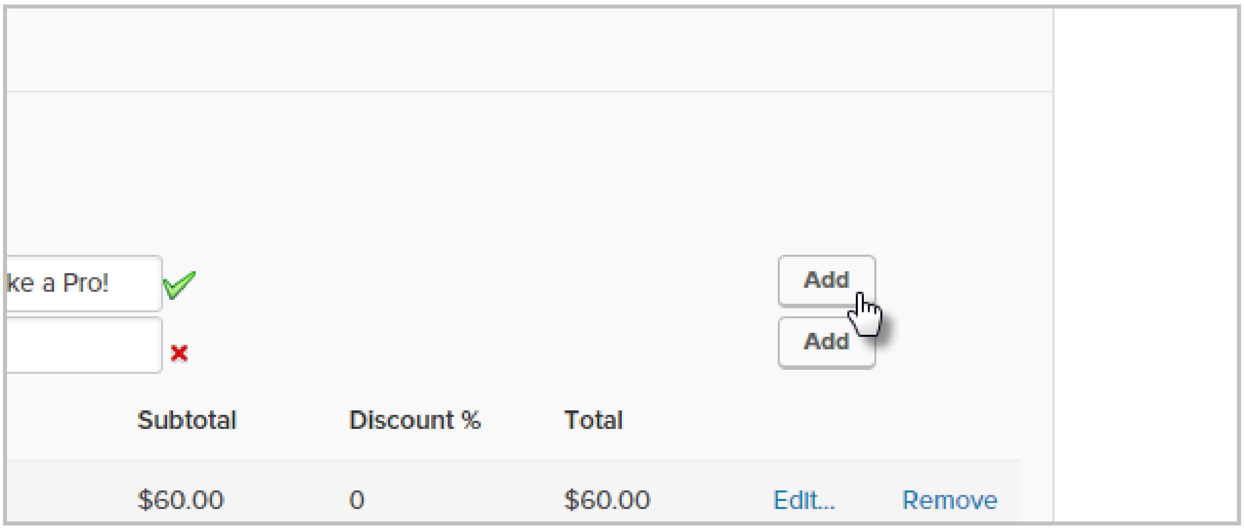
6. Click the **Save this Action** link.



7. Start typing the name of the product and select it from the drop-down.

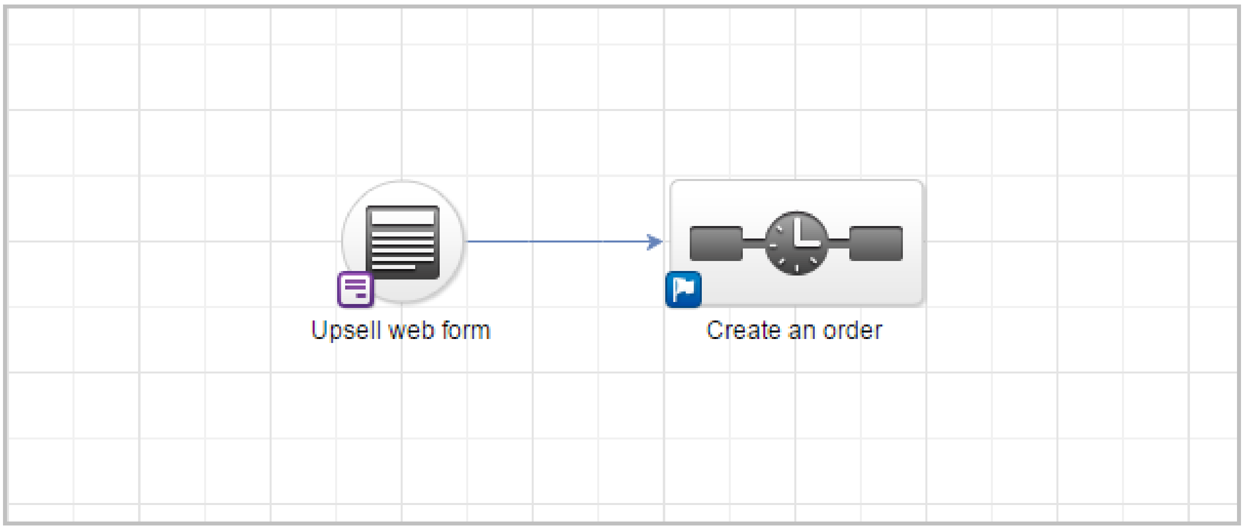


8. Click **Add** next to the product



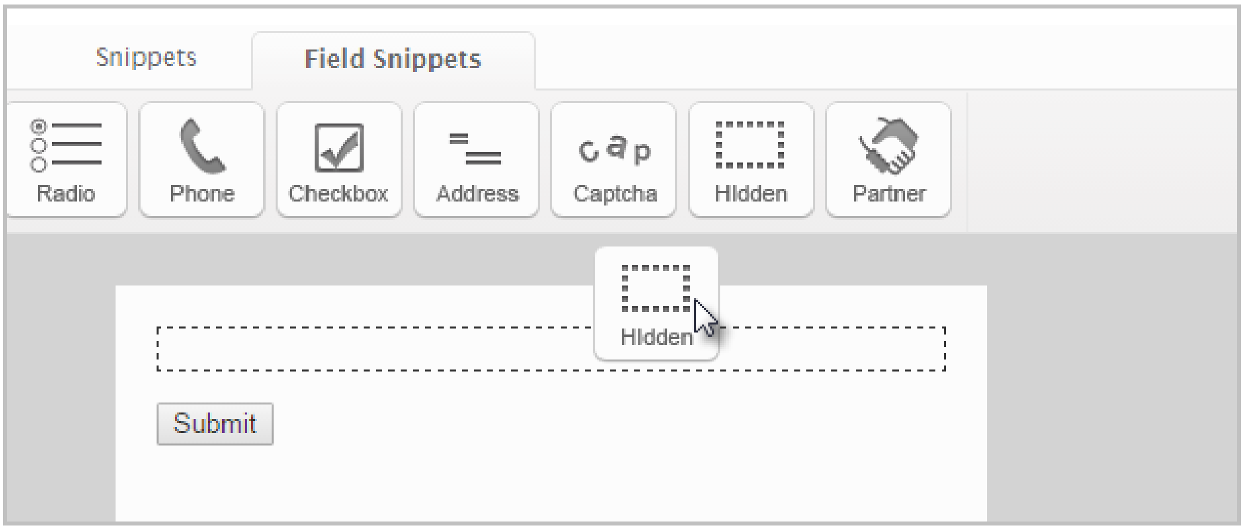
9. Click **Save,** then **Save** again

4. Create a new campaign. You can name it "Upsell Campaign" if you wish. The campaign will only need a web form goal attached to a campaign sequence as shown below:

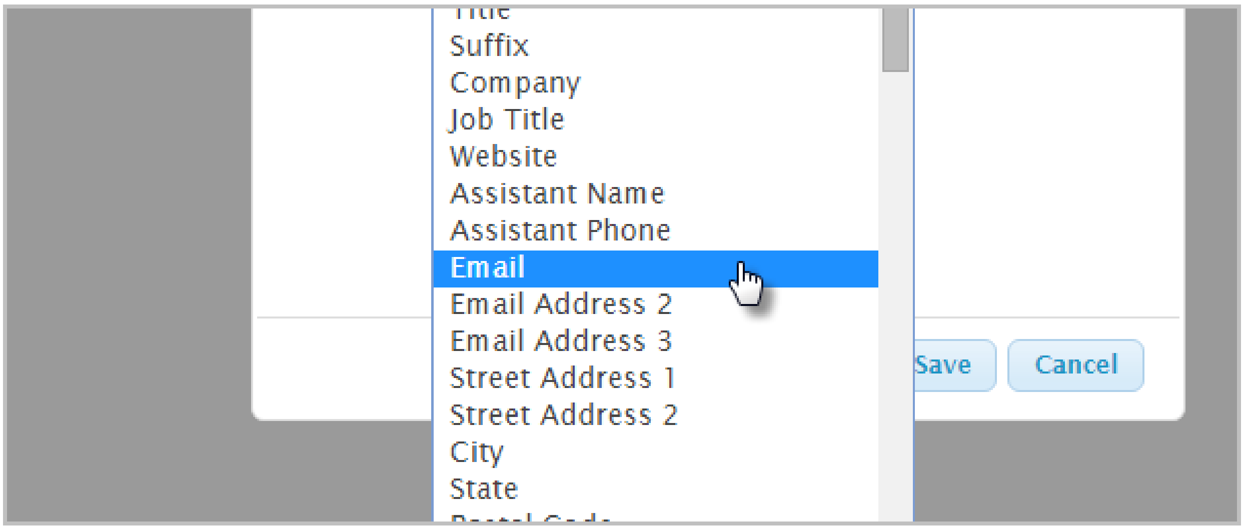


5. Configure the web form following the steps below. Note that this form will only contain one hidden email address field
   1. Delete all default fields on the form so that you only have a *Submit* button

   2. Click on the **Field Snippets** tab and drag a **Hidden** object onto the form



   3. Select **Email** from the drop-down and click **Save**.

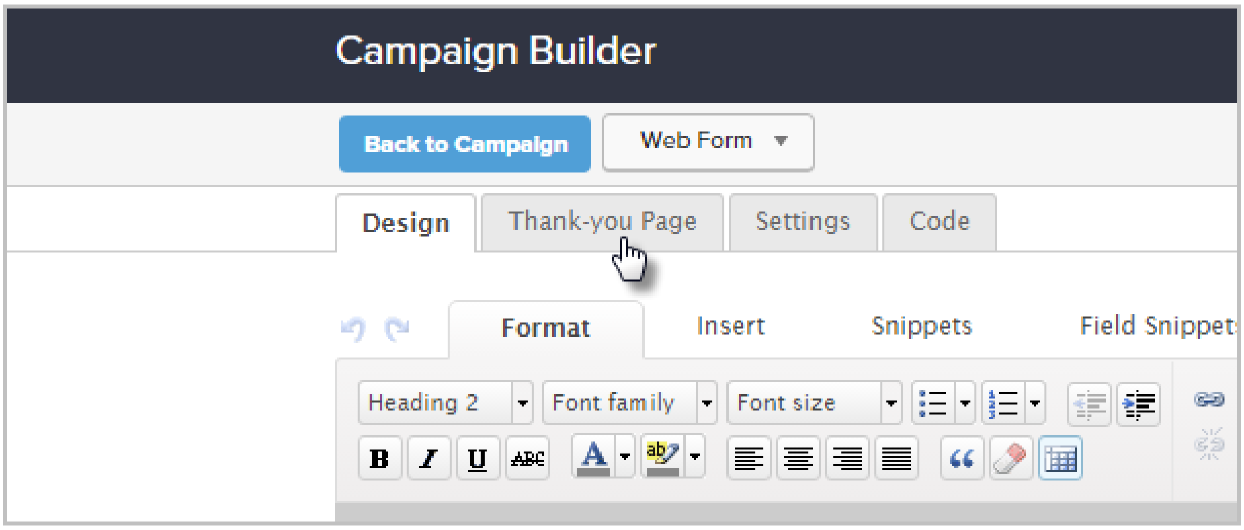


4. Now, modify the web form to look like an upsell. In the example below, I added a paragraph snippet to the form, then inserted a 2X1 table into the paragraph with an image on the left and a description on the right.

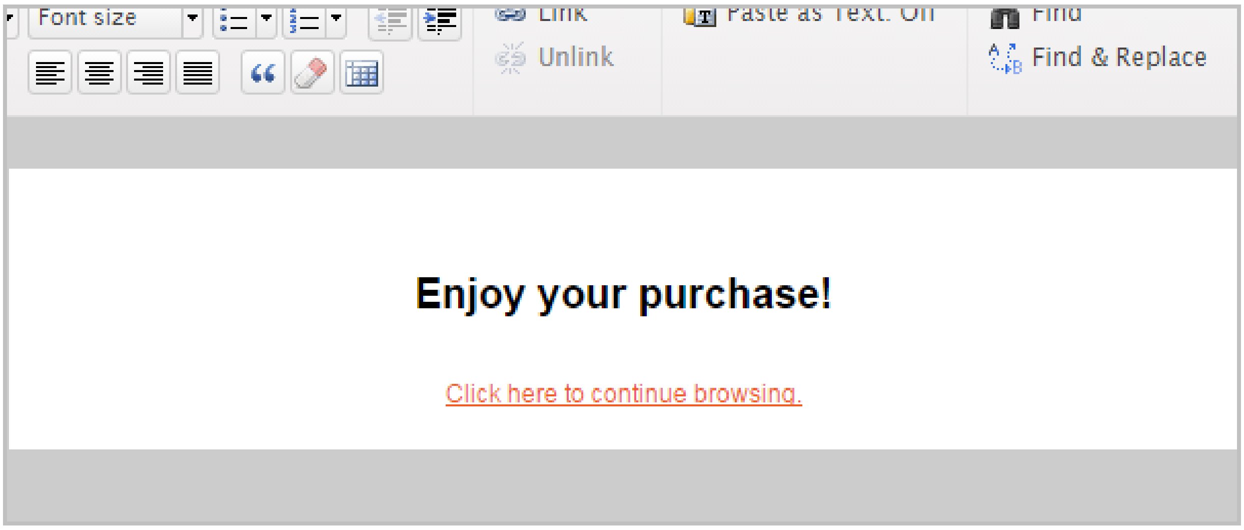
5. Modify the submit button to be the purchase button. I changed the text to "Add to Order" as seen above.
Please Note! This will only work when using the Infusionsoft hosted version of the web form. The web form can be added to you web site and hosted by you using the HTML or JavaScript embed code, but doing this requires that custom code be added to your web site that auto populates the hidden fields for email address so the web form can identify who to add the order to. This custom

code is not provided by Infusionsoft.

6. Configure the Thank You page to thank the customer for purchasing the upsell
    1. Click the Thank-You page tab

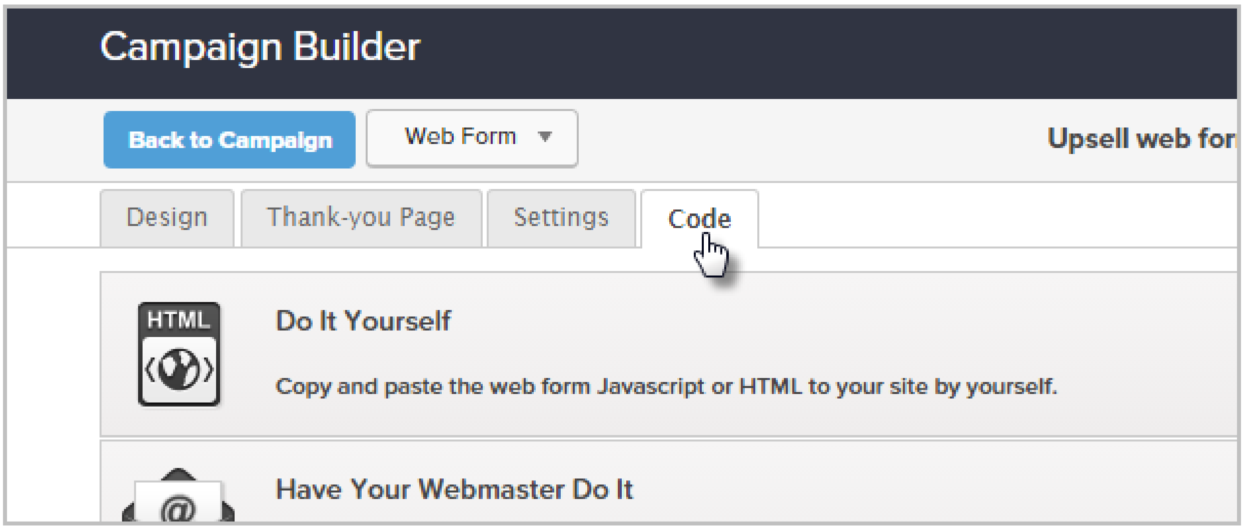


    2. Style the page as you wish

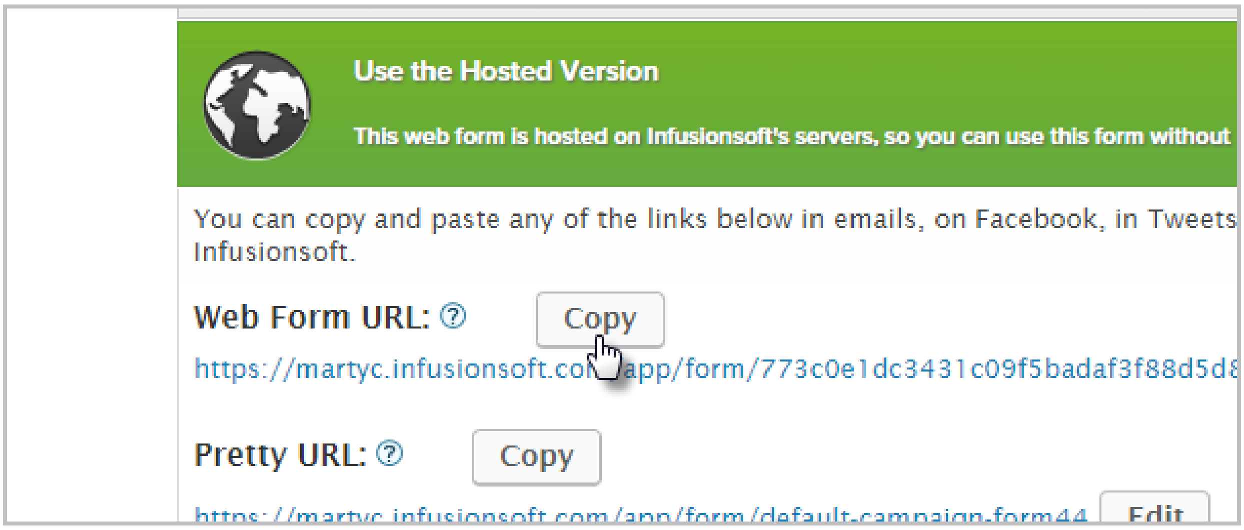


    3. Now, grab the URL of the web form. We will need it for later.

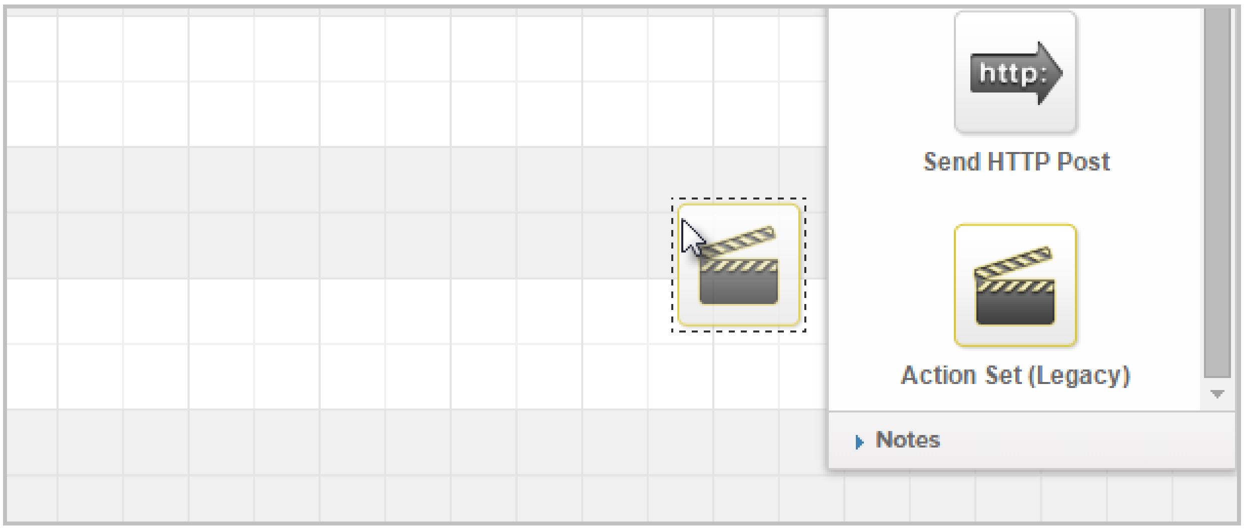
    4. Click on the **Code** tab



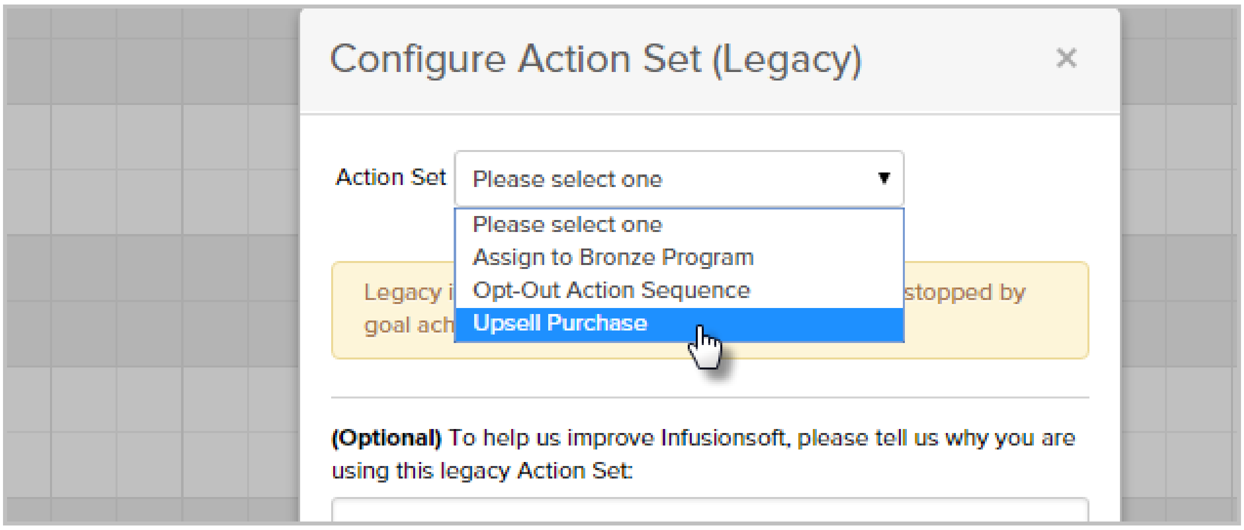
5. Click on **Use the Hosted Version**, then copy the url. Paste it somewhere so that you can get to it later (like Notepad or TextEdit...or just paste it in a new web browser tab for now.)



7. Now, let's configure the connecting sequence to create an order when the form is submitted
    1. Double-click the sequence to set it up
    2. Drag an **Action Set (Legacy)** object onto the sequence canvas to the right of the **Start** icon.



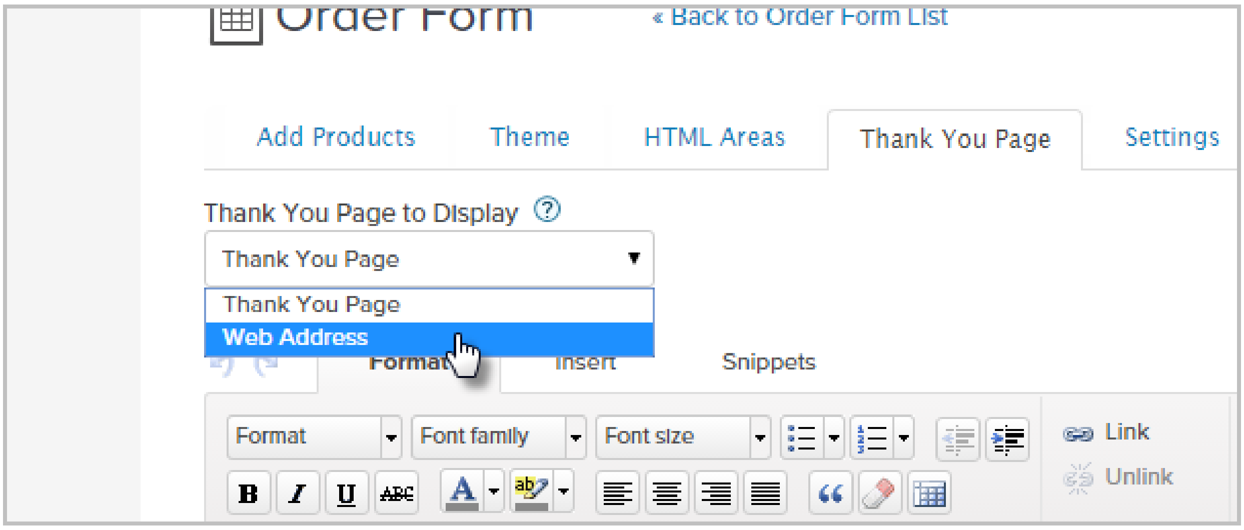
3. Double-click the **Action Set (Legacy)** object and select the action you created earlier that creates the order.



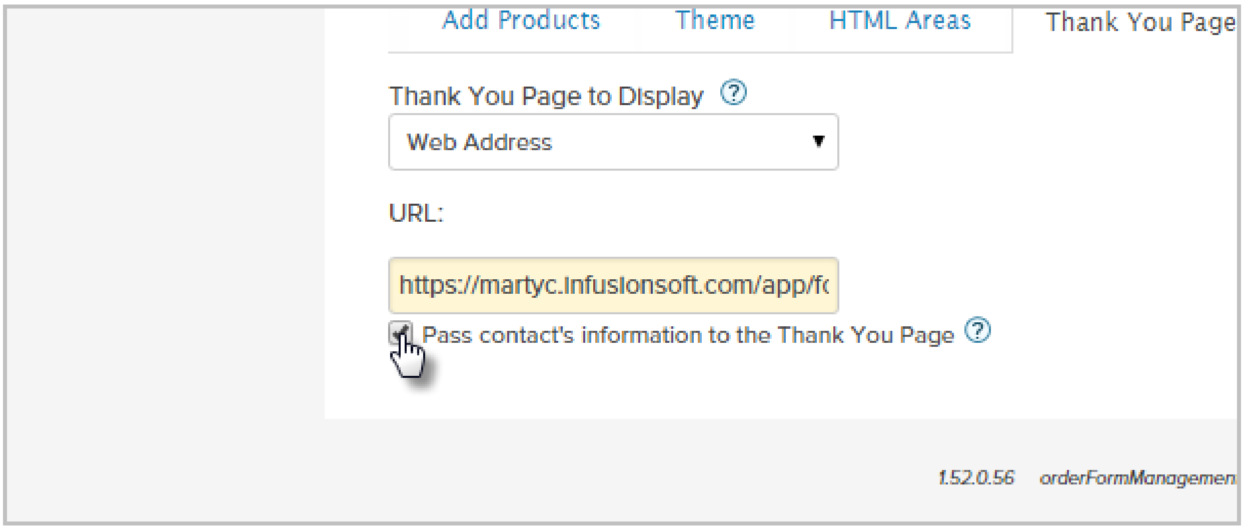
4. Click **Save**

8. Your almost done! Set all the campaign objects to Ready and **Publish** it.

9. Go back to the order form you created in step 2
   1. Click on the **Thank You page** tab, then change the drop-down to **Web Address**



2. Paste the web form URL you copied earlier into the text field.



3. Make sure to check the box, "Pass contact's information to the Thank You Page". If this checkbox is not selected, the upsell won't work!

4. Click **Save**

10. You're done! Test out the order form and see it in action.

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Available Shipping Options

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After you configure the default shipping options, you will need to create the shipping methods customers choose from when checking out through the Infusionsoft Shopping Cart. You can choose from the following calculation methods. Within each method, you can designate several options with different price and delivery time frames (i.e. Standard, Priority, Overnight, International.)

You are able to use a combination of the fixed shipping methods, however, they will all show up during checkout. You cannot set up if/then rules to show or hide them based on the products or customer location.

Real Time Shipping Rates

UPS (United Parcel Service): This method calculates shipping in real time as customers check out through the shopping cart. These shipping fees are determined by customer location, delivery type, and current UPS rates. You can include several different UPS options with different levels of pricing (e.g. Next Day, Ground.) The customer chooses their preference based on price and urgency. You can only use this option if you have a shipping account with UPS or register for a new account . After you create the My UPS account, you'll need to create a UPS Shipping Account.

Fixed Shipping Rates

- **Specific Price per Product**: This method charges a specific shipping fee for each "shippable" product in the cart. You set up a separate price for each product, and the system adds the per-product shipping fees together to provide a total at checkout. In most cases, you will create more than one price-per-product option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)
- **Ship by Weight**: This method calculates shipping fees based on the total weight of the products in the cart. To use this method, you will need to add product weights to each "shippable" product. The system compares the weight total to the weight-range pricing structure you've set up and charges the corresponding fee. If the weight total of the products does not fall into one of the ranges you've defined, the system will charge a default shipping fee. In most cases, you will create more than one ship by weight option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)
- **Ship by Order Total**: This method calculates shipping fees based on the total cost of the "shippable" products in the cart. The system compares this total to the dollar ranges you've set up on your shipping table and charges the corresponding fee. If the order sub-total does not fall within one of the ranges you've defined, the system will charge the default shipping fee. In most cases, you will create more than one ship by order total option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)
- **Ship by Order Quantity**: This method calculates shipping fees based on the total number of "shippable" products in the cart. It is a good solution for companies whose products are similar in weight and size since the actual shipping cost for each product should not vary much. The system sums up the number of products in the cart and multiplies it by the shipping price per item. This can then be added to a base price to come up with a total. You can also set up a minimum shipping price that will override the actual shipping calculation if the actual fee is less than the minimum price you've defined. In most cases, you will create more than one ship by order quantity option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.
- **Flat Rate Per Order**: This method charges the same shipping fee for every order, regardless of the number, price, weight, or type of products in the cart. It does not

perform any calculations at all. It will charge shipping as long as there are "shippable" products in the shopping cart. In most cases, you will create more than flat rate option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)

Note: If you do not charge shipping fees, then you do not need to set up these options. You can disable shipping for each product by setting the "shippable" option in the product record to "No".

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Configure Shipping Options

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1. Go to **E-Commerce > E-Commerce Setup**
2. Go to the *Shipping Options* section and click on **Shipping Options**
3. Review and update the *Ship From* Location. This information is copied from your company profile. Any information changed here will not update your company profile.
4. Click on the **Options** tab
    - **Tax shipping amounts:** Mark this check box to apply tax to the order total, including the shipping fees.
    - **Allow shipping outside the United States:** Mark this check box to enable international shipping. If you do not allow for shipping outside of the United States, customers can only enter a U.S. address when checking out through the shopping cart.
    - **Countries considered domestic:** Select the countries that qualify for domestic shipping rates. Hold down the Ctrl key on your keyboard to select more than one. Note: This option is only available when the Allow shipping outside the United

States checkbox is marked.

5. Click **Save**

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UPS Integration

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The UPS (United Parcel Services) shipping method calculates shipping in real time as customers check out through the shopping cart. These shipping fees are determined by customer location, delivery type, and current UPS rates. You can include several different UPS options with different levels of pricing (e.g. Next Day, Ground). The customer chooses their preference based on price and urgency.

You can only use this option if you have a shipping account with UPS or register for a new account . After you create the My UPS account, you'll need to create a UPS Shipping Account .

Weight Restrictions. Make sure your products fall within the 150 lb / 70 kg UPS weight restrictions. Read more here .

Get the Access Key and Shipping Account number from UPS

Log on to your My UPS Account to request an access key. You will use this key in Infusionsoft.

For your convenience, we've provided brief instructions below. Please contact UPS directly to request more detailed assistance.

1. Go to **Support** > **Technology Support**
2. Click on the **Use the Developer Resource Center** link.
3. Get the following information to use in Infusionsoft.
    1. Access Key
    2. Shipping Account Number
4. Enter a weight for each shippable product in Infusionsoft.
    1. Go to E-Commerce > Products
    2. Click on the **Add a Product** button to add a new product or click on a product link to edit an existing one.
    3. Go to the *Product Information* section.
        1. **Shippable**: Choose *Yes*
        2. **Weight**: Enter the product weight. The default unit is Pound. Go to **E-Commerce** > **Settings** > **Order Settings** > **Fulfillment** section to change the unit. *Note: UPS calculates shipping based on pounds or kilograms. If you use ounces or grams, product weights will be converted to pounds or kilograms when passed to UPS. The ship from address (see below) must be in a metric system country to use kilograms.*
    4. Click **Save** and repeat for additional products.

Set up UPS Shipping

1. Go to **E-Commerce** > **E-Commerce Setup**
2. Go to the *Shipping Options* section and click on **Shipping Options**.
3. Verify or Update the *Ship From* information on the *My Location* tab. The *Ship From* location influences the shipping rates.
4. Click on the **Shipping Methods**.
5. Click on the **Add a Method** button
6. Click on **UPS**
7. Enter the Shipping Method Settings:
    1. **Display Name and Description**: Your customers will see this information during checkout (e.g. UPS/United Parcel Service.)
    2. **Enable this Shipping Method**: New shipping methods are enabled by default, which means they show up for customers. Unmark this checkbox to hide the shipping option.
    3. **International Shipping Method**: Mark this checkbox to offer this shipping to international customers, those outside your default country (**E-Commerce** > **E-Commerce Setup** > **Shipping Methods** > **Other**tab.)

Enter the UPS Settings

1. **Access Key**: Enter the key you obtained from UPS
2. **My UPS Username / ID**: Enter the username you use to log into your My UPS account. This is case sensitive and must exactly match the username you set up in UPS (e.g. MyUsername is not the same as myusername.)
3. **My UPS Password**: Enter the password you use to log into your My UPS account.
4. **Shipping Account Number**: Enter the UPS Shipping Account number you obtained from UPS
5. **Destination Type**: Select the Destination Type you designated when you set up your My UPS account.
6. **Pickup Type**: Select the Pickup Type you designated when you set up your My UPS account.
7. **Packaging Type**: Select the Packaging Type you designated when you set up your My UPS account.
8. **Delivery Types**: Mark the checkbox beside each type you want to offer. Customers will choose their preferred type during checkout based on the shipping price they are willing to pay.
9. Mark the checkbox to *calculate shipping on the total weight of an order*.
10. Click **Save**

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Shipping Fees Per Product

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The Specific Price per Product shipping method charges a specific fee for each "shippable" product in the cart. You set up a separate price for each product, and the system adds the per-product shipping fees together to provide a total at checkout. In most cases, you will create more than one price-per-product option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)

1. Go to **E-Commerce > E-Commerce Setup**
2. Go to the *Shipping Options* section and click on **Shipping Options**
3. Click on the **Shipping Methods** tab
4. Click on the **Add a Method** button
5. Click on **Specific Price Per Product** to select it
6. Enter the Shipping Method Settings
    - **Display Name and Description:** Your customers will see this information during checkout (e.g. USPS Standard Shipping / Standard Postal Service 3-5 Business Days.)
    - **Enable this Shipping Method:** New shipping methods are enabled by default, which means they show up for customers. Unmark this checkbox to hide the shipping option.
    - **International Shipping Method:** Mark this checkbox to offer this shipping method to international customers, those outside your default country.
7. Click **Save**
8. Enter the Ship By Product Prices. Each shippable product is listed here. Enter the shipping price for each one. The system will add up the prices for the individual products to determine the shipping total.
9. Click **Save**

10. Repeat the process to create additional Specific Price Per Product options (i.e. Standard, Priority, Overnight, International, etc.)

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Shipping Fees Based On Product Weight

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The ship by weight shipping method calculates fees based on the total weight of the products in the cart. To use this method, you will need to add product weights to each "shippable" product. The system compares the weight total to the weight-range pricing structure you've set up and charges the corresponding fee. If the weight total of the products does not fall into one of the ranges you've defined, the system will charge a default shipping fee. In most cases, you will create more than one ship by weight option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)

1. Go to **E-Commerce** > **E-Commerce Setup**
2. Go to the *Shipping Options* section and click on **Shipping Options**
3. Click on the **Shipping Methods** tab
4. Click on the **Add a Method** button
5. Click on **Ship by Weight**
6. Enter the Shipping Method Settings
    - **Display Name and Description**: Your customers will see this information during checkout (e.g. USPS Standard Shipping / Standard Postal Service 3-5 Business Days.)
    - **Enable this Shipping Method**: New shipping methods are enabled by default, which means they show up for customers. Uncheck this checkbox to hide the shipping option.
    - **International Shipping Method**: Mark this checkbox to offer this shipping method to international customers, those outside your default country.
7. Enter the **Ship By Weight** Settings
    - **Default Price**: The default price is charged when the weight of an order does not fall within the defined weight ranges. It is a safety net that prevents a zero dollar shipping charge.
    - **Calculate shipping cost based on the total weight of the order**: By default the

system totals the weight of the products in the cart and then checks your shipping rate table to identify the correct order shipping fee. Uncheck this checkbox if you want the system to check the rate table on a per-product basis and then add the individual shipping fees together to calculate the order shipping fee. *Note: The second calculation process generally charges a higher (and possibly unreasonable) shipping fee.*

  - **Weight Ranges**: Create your shipping rate table.
    - Enter a weight range (e.g. 0 pounds up to 5.0 pounds, 5.0 pounds up to 10 pounds). Note: The lower value in the range is included. The top number in the range is not. It becomes the lower value in the next range.
    - Enter the price for that range (e.g. $2.50)
    - Click on the **Add Ranges** link to repeat the process for additional weight ranges.

8. Click **Save**

9. Repeat the process to create additional ship by weight options (i.e. Standard, Priority, Overnight, International, etc.)

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Shipping Fees Based On The Order Total

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The Ship by Order Total shipping method calculates fees based on the total cost of the "shippable" products in the cart. The system compares this total to the dollar ranges you've set up on your shipping table and charges the corresponding fee. If the order sub-total does not fall within one of the ranges you've defined, the system will charge the default shipping fee. In most cases, you will create more than one ship by order total option to give your customers a choice of price and delivery type (e.g. Standard, Priority, Overnight, International, etc.)

1. Go to **E-Commerce** > **E-Commerce Setup**
2. Go to the *Shipping Option*s section and click on **Shipping Options**
3. Click on the **Shipping Methods** tab.
4. Click on the **Add a Method** button
5. Click on **Ship by Order Total**
6. Enter the **Shipping Method Settings**
    - **Display Name and Description:** Your customers will see this information during checkout (e.g. USPS Standard Shipping / Standard Postal Service 3-5 Business Days.)
    - **Enable this Shipping Method:** New shipping methods are enabled by default, which means they show up for customers. Uncheck this checkbox to hide the shipping option.
    - **International Shipping Method:** Mark this checkbox to offer this shipping method to international customers, those outside your default country **(Setup** > **Shopping Cart** > **Checkout section** > **Other Settings** link.)
7. Enter the **Ship By Order Total Settings**
    - **Default Price:** The default price is charged when the total cost of an order does not fall within the defined order total ranges. It is a safety net that prevents a zero dollar shipping charge.

- **Order Total Ranges:** Create your shipping rate table.
    - Enter a price range (e.g. $0 up to $20.00, $20.00 to $50.00). Note: The lower value in the range is included. The top number in the range is not. It becomes the lower value in the next range.
    - Enter the price for that range (e.g. $3.00)
    - Click on the **Add Ranges** link to repeat the process for additional weight ranges.

8. Click **Save**

9. Repeat the process to create additional Ship By Order Total options (i.e. Standard, Priority, Overnight, International, etc.)

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Shipping Fees Based On Order Quantity

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The Ship by Order Quantity shipping method calculates fees based on the total number of "shippable" products in the cart. It is a good solution for companies whose products are similar in weight and size since the actual shipping cost for each product should not vary much. The system sums up the number of products in the cart and multiplies it by the shipping price per item. This can then be added to a base price to come up with a total. You can also set up a minimum shipping price that will override the actual shipping calculation if the actual fee is less than the minimum price you've defined. In most cases, you will create more than one ship by order quantity option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)

1. Go to **E-Commerce > E-Commerce Setup**

2. Go to the *Shipping Options* section and click on **Shipping Options**

3. Click on the **Shipping Methods** tab

4. Click on the **Add a Method** button button

5. Click on **Ship by Order Quantity**

6. Enter the **Shipping Method Settings**
   - **Display Name and Description:** Your customers will see this information during checkout (e.g. USPS Standard Shipping / Standard Postal Service 3-5 Business Days.)
   - **Enable this Shipping Method:** New shipping methods are enabled by default, which means they show up for customers. Uncheck this checkbox to hide the shipping option.
   - **International Shipping Method:** Mark this checkbox to offer this shipping method to international customers - This will present a list of countries, allowing you to choose countries considered "Domestic", where an International Shipping Method would not apply.

7. Enter the **Quantity Settings**

- **Base Shipping Price**: The Base Shipping Price is the starting point. It may represent a handling fee. The calculated quantity fee is added to the Base fee to determine the total shipping fee.
- **Price Per Items**: This is the shipping fee for each item. The system will multiply the number of items in the cart by this amount to calculate the quantity fee.
- **Minimum Shipping Price**: The Minimum Shipping Price overrides the Base + Quantity fee for orders falling below this minimum price.

  Example:
  Base Price=$5.00 / Price Per Item=$1.00 / Minimum=$7.00
  Scenario 1: There are 10 items in the cart. The Shipping Fee will be calculated by Base ($5.00) + Price Per Item (10 x $1.00=$10). The total shipping fee is $15.00, which is more than the minimum. The system will charge the calculated fee, $15.00.
  Scenario 2: There is 1 item in the cart. The Minimum Shipping Fee ($7.00) will override the calculated fee. The calculated fee falls below the minimum threshold, Base ($5.00) + Price Per Item (1 x $1.00) is only $6.00.

8. Click the **Save** button

9. Repeat the process to create additional Ship Order Quantity options (i.e. Standard, Priority, Overnight, International, etc.)

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Flat Rate Shipping Fees

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The flat rate per order shipping method charges the same fee for every order, regardless of the number, price, weight, or type of products in the cart. It does not perform any calculations at all. It will charge shipping as long as there are "shippable" products in the shopping cart. In most cases, you will create more than one flat rate option to give your customers a choice of price and delivery type (i.e. Standard, Priority, Overnight, International, etc.)

1. Go to **E-Commerce > E-Commerce Setup**
2. Go to the *Shipping Options* section and click on **Shipping Options**
3. Click on the **Shipping Methods** tab
4. Click the **Add a Method** button
5. Click on **Flat Rate Per Order**
6. Enter the **Shipping Method Settings**
    - **Display Name and Description:** Your customers will see this information during checkout (e.g. USPS Standard Shipping / Standard Postal Service 3-5 Business Days.)
    - **Enable this Shipping Method:** New shipping methods are enabled by default, which means they show up for customers. Uncheck this checkbox to hide the shipping option.
    - **International Shipping Method:** Mark this checkbox to offer this shipping method to international customers, those outside your default country (**Setup > Shopping Cart > Checkout section > Other Settings** link.)
7. Enter the **Flat Rate Per Order. Shipping Price:** This shipping price is offered for every order.
8. Click **Save**

9. Repeat the process to create additional flat rate per order options (i.e. Standard, Priority, Overnight, International, etc.)

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Automate Order Fulfillment With Fulfillment Reports

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Infusionsoft helps you streamline the order fulfillment process through the use of fulfillment reports. When an order is placed, Infusionsoft can automatically notify the person or company responsible for shipping the item(s). This person may be an internal team member who has user access to your Infusionsoft system, a third-party fulfillment company, or a combination of both. You are able to create multiple fulfillment reports - one for each fulfillment provider and the group of products they are responsible for shipping.

The fulfillment report displays the customer's contact information, shipping information, and the quantity and name of product(s) ordered. You are not able to control the fields displayed on the fulfillment report. The data is automatically populated based on order data.

Note: The fulfillment report triggers on the initial purchase and when a recurring subscription order autocharge is processed.

1. Go to **E-Commerce > Settings**

2. Click on **Fulfillment Reports** in the **settings** menu

3. Click on the **New Fulfillment Report** button to create a new report
    - **Enter a Name**. The name is a way for you to easily identify what's going on with this report at a glance. In most cases, you should use the name of the responsible fulfillment person or company.
    - Select a fulfillment time frame from the drop-down:
        - **Immediately**: Select this option to ship the product immediately, regardless of the payment status.
        - **Invoice Paid Current**: Select this option to ship the product as long as the amount due has been paid, even if there are additional payments due as part of a payment plan.
        - **Invoice Paid Full**: Select this option to delay shipping until the entire invoice is paid in full (meaning the customer has paid all of the installments due as part of a payment plan.)

4. Click **Save** to reveal additional fields

5. Add Products to the report. Start typing a name of the product and it will appear in the drop-down. If you can't remember the name of the product, just tap the space bar on your keyboard. Repeat the process to add more products. Remember, only select products that this particular fulfillment provider is responsible for shipping.

6. Set up the Schedule. Select the **Schedule Type** you and your fulfillment provider have agreed upon.
    - **Every X number of days**: Schedule the report to go every day or every few days (when there are more to ship) at a specific time of day.
    - **On the same day(s) each week**: Schedule the report to go out on a specific day of the week at a specific time of day.
    - **When there are X to process**: Schedule the report to go out when a specific number of items have been ordered. Make sure you add a top limit to the number of days to wait - you don't want customers waiting too long!

7. Set up the report Delivery options. Select a Delivery Method from the drop-down:
    - **Manually Processed**: Choose to assign the shipping responsibility to one of your Infusionsoft users.
        - **Managed By**: Select the user in your Infusionsoft account that is responsible for shipping. This creates a Fulfillment job on their home page. They can also see the **Cancel** and **Resume** fulfillment links in the order record.
        - (Optional) **Approved By**: Select the user responsible for approving order

fulfillment before it takes place. The job will show up for this user until it is approved, and then will be assigned to the user responsible for shipping.

- **An email will be sent with an attachment**: Choose this to send the shipping list to an outsourced fulfillment company.
    - Enter the outsourced fulfillment company email information in the fields, including fulfillment instructions in the email body. This email should come from the person from your company who is responsible for overseeing fulfillment and responding to the provider's questions.
    - **Managed By**: This person can also see the Cancel and Resume Fulfillment links in the order record.
    - (Optional) **Approved By**: Select the user responsible for approving order fulfillment before it takes place. The job will show up for this user until it is approved, and then a notification will be sent to the outsourced fulfillment company to initiate the fulfillment process.

8. Click **Save**

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QuickBooks Integration Overview

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The QuickBooks integration is disabled by default. Please contact Customer Service by phone or chat to request that it be enabled. You will be asked to read and sign a legal disclaimer, then email it back to them.

Pro-Tip! It is suggested that you contact support via normal business hours when making this request. After-hours support may not have access to send you the appropriate documentation without escalating your request to a higher-level team member.

Important! This tool only syncs data *from* Infusionsoft *to* QuickBooks. For a more complete solution, check the Infusionsoft Marketplace for a vendor.

Infusionsoft integrates with the desktop version of QuickBooks. It gives you the ability to export invoice and payment data (cash payments, returns, refunds, & credits) from Infusionsoft and use it to update QuickBooks.

Important! Please review the QuickBooks integration documentation thoroughly before you begin using this feature and back up your QuickBooks Data before each import. Follow the QuickBooks setup instructions in order. Do not skip or re-order any of these steps!

Infusionsoft has made this feature available; however, Infusionsoft employees are not able to access your QuickBooks data or offer any advice, suggestions, or ideas about accounting practices or processes.

FAQs

Here are some additional tips and the answers to the questions our users most frequently ask about the QuickBooks integration:

- Always back up your QuickBooks data before each import.
- Your accounting expert should be in charge of mapping QuickBooks accounts to Infusionsoft products.
- Test the Import using an EXACT copy of your working QuickBooks file before you import into your actual QuickBooks file.
- This process moves data from Infusionsoft to QuickBooks only. It does NOT move any data from QuickBooks to Infusionsoft.
- Infusionsoft employees do not support QuickBooks and cannot advise you about managing QuickBooks data or about accounting best practices.
- QuickBooks does NOT support payment plans. Invoices you import into QuickBooks will appear as a single invoice, even if there is a payment plan attached to the order.
- Product Items in QuickBooks are the QuickBooks accounts.
- The IIF file does not import "classes."
- The Payment Credit Account and the Credit Credit Account are both accounts receivable. The Payment Credit Account is for actual funds received. The Credit Credit account is for credits, comps, freebies, etc. that you've given to customers.

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QuickBooks Integration Setup

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Prepare Products for import into QuickBooks

1. Go to **E-Commerce** > **Products** and click on a product's name to edit it.
2. Go to the **QuickBooks Information** tab to enter:
    1. **QuickBooks Product Name**: The QuickBooks Product Name must exactly match the name or number you've assigned to the product in QuickBooks. It does not need to match the name of the product in Infusionsoft. The QuickBooks Name must have fewer than 31 characters.
    2. **QuickBooks Account Name**: The QuickBooks Account Name must exactly match the Account Name on your QuickBooks Profit & Loss report. Separate the Account and sub-account with a colon, no space (e.g. Initial Licenses:Infusionsoft - Initial Licenses is the Account, Infusionsoft is the sub-account). In some cases, you may have more than one sub-account (e.g. Services:Training:Classes - Training and Classes are both sub-accounts). *Note: Sub-accounts are optional in QuickBooks. Your business may not use them.*
3. **Save** the product
4. Repeat this process for the remainder of your products.

Map Infusionsoft to QuickBooks: Accounts & Non-standard Product Types

Be Careful! You are responsible for the accuracy of the information you enter into these fields based on a good understanding of your QuickBooks program. The Infusionsoft service and support teams cannot instruct or advise you in this area.

1. Go to **E-Commerce** > **Settings** and click on **QuickBooks** in the *settings* menu.
2. Enter **QuickBooks Account Names** into Infusionsoft. These names must exactly match the account and sub-account names on your QuickBooks Profit & Loss Report. Separate the Account and sub-account names with a colon, no space (e.g., Initial Licenses:Infusionsoft.)

1. **Invoice Debit Account**: Enter the name of the QuickBooks Account (and applicable sub-account(s)) that updates when a debit account is invoiced (e.g. Accounts Receivable). This account may differ based on your accounting method.
2. **Payment Debit Account**: Enter the name of the QuickBooks Account (and applicable sub-account(s)) that updates when a payment is made to a debit account (e.g. Undeposited Funds or a Bank Name.)
3. **Payment Credit Account**, **Credit Credit Account**, and **Refund Credit Account**: Enter the names of the QuickBooks Accounts that update when there is a credit to Accounts Receivable. These fields determine what updates in QuickBooks when someone pays you (Payments Credit), you issue a credit to a customer (Credit Credit), or you issue a refund (Refund Credit.)
4. **Credit Debit Account**, **Refund Debit Account**: Enter the names of the QuickBooks Debit Accounts that update when there is a credit or refund to Accounts Receivable.

3. Map the additional Infusionsoft Product Types (for Manual Orders) to QuickBooks. The default type is "Product." This type maps to QuickBooks according to the information you entered into individual Product and Subscription records. When your team enters a manual order, they can choose from the following additional types: Unknown Type, Program, Shipping, Tax, Service & Misc. Upsell Product, Finance Charge, and Special.
4. Use the remainder of the fields on this screen to map the additional product types. Each additional product section (e.g. Tax) has the following fields:
    1. **Item Name Default**: This will be assigned to all items that do not have a product item name in the actual line item of the order. (e.g. Shipping.)
    2. **Pass Item Description as the Name**: Set to Yes if you want to override the Product Name and pass the item description to QuickBooks instead of the item name.
    3. **Item Account Default**: This field maps the item type (e.g. Shipping) to a QuickBooks Account. The account names must exactly match the account and sub-account names on your QuickBooks Profit & Loss Report. Separate the Account and sub-account names with a colon, no space.

Train Your Manual Order Entry Team

Important! Your order entry team must properly classify the line items (e.g. product, program, shipping, tax, etc) during manual order entry so that QuickBooks maps them to the correct QuickBooks Account during IIF file import. If you do not properly classify products in orders, then they will be mapped to a generic QuickBooks account.

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Export An IIF File To Update QuickBooks

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The Infusionsoft All Sales Report produces a list of orders based on the search criteria you set and the All Payments Report produces a list of all payments (e.g. check, credit card, etc.) and credits applied manually or during a refund process. You need to export both reports to update QuickBooks. The Sales Reports creates debits in QuickBooks. The All Payments Report applies credits in QuickBooks. If you only import the All Sales Report, your Accounts Receivable will be too high since payments and credits will not be applied.

Export Sales and Payment IIF Files from Infusionsoft

1. Go to **E-Commerce** > **Reports**
2. Click on **All Sales Report** and enter a specific date range. *Note: You may need to click on the **Start Over** button to clear past search criteria.*
3. Click on the **Search** button to view the orders placed within that date range.
4. (Optional) Unmark the checkbox beside the orders you want to exclude from the export.
5. Click on the Actions button located at the top left of the page and select **Export in IIF Format** from the drop-down.The export takes longer when there are a large number of order records. Click on **OK** to continue.
6. Open the IIF file. Review it to make sure accounts receivable, QuickBooks accounts and sub-accounts are accurate. If this data is not accurate, do not proceed. Review your QuickBooks settings in Infusionsoft and correct the errors first.
7. If the file is accurate, save it to your computer as an *.iif* file.
8. Repeat this process for the Payments Report, setting the same date range used to export the All Sales Report.

Import the Sales and Payment IIF Files into QuickBooks

Note We provide these instructions as a courtesy to our customers. If you have specific questions, please contact QuickBooks support for assistance.

1. Log in to QuickBooks.

2. Go to **File** and choose **Switch to Single User**.
3. Go to **File** > **Utilities** > **Import** > **IIF Files** and browse for the file you saved on your computer.
4. Select the file on your computer and click on **Open**. A window will open confirming that your data has been imported.
5. For Payment data imports: You must manually match each payment in the import file to a QuickBooks invoice and then apply the payment manually. This is required by QuickBooks and aligns with standard accounting rules.

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Find A List Of Sales By Their QuickBooks Status

Last Modified on 08/02/2018 1:59 pm MST

You can filter the **All Sales Report** and **Payments Report** by QuickBooks status.

Filter the All Sales Report by QuickBooks Status...

1. Go to **E-Commerce** > **Reports** and click on **All Sales Report**.
2. Click the **Start Over** button to reset the search criteria.
3. Click on the **QuickBooks Status** tab to select QuickBooks related search criteria.
4. Select your Criteria
    1. **Export Status:** Choose from Downloaded (Exported to IIF), Imported (Uploaded to QuickBooks) and Error (Unsuccessful Export.)
    2. **Has been Exported**: Select Yes or No.
    3. **Export Date**: Set a specific date range.
5. Click the **Search** button to view the results.

Filter the Payments Report by Quickbooks Status...

1. Go to **E-Commerce** > **Reports** and click on **Payments Report**.
2. Click on the **Start Over** button to reset the search criteria.
3. Click on the **QuickBooks Status** tab to select QuickBooks related search criteria.
4. Select your criteria:
    1. **Export Status:** Choose from Downloaded (Exported to IIF), Imported (Uploaded to QuickBooks) and Error (Unsuccessful Export.)
    2. **Has been Exported**: Select *Yes* or *No*
    3. **Export Date**: Set a specific date range.
5. Click on the **Search** button to view the results.

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Gross Sales Reports

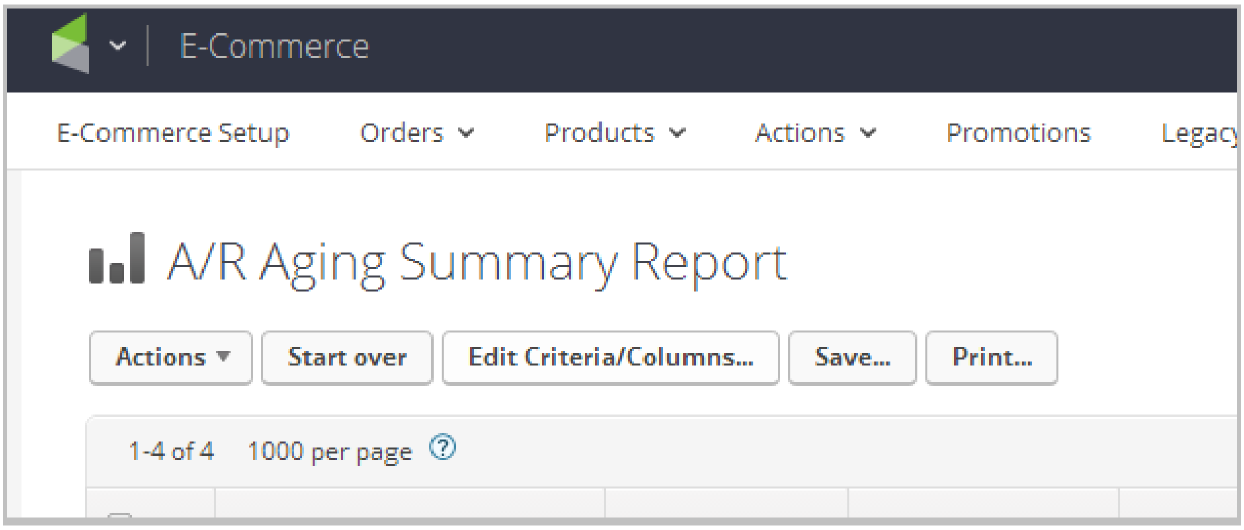
Last Modified on 08/02/2018 2:00 pm MST

There are several order reports **E-Commerce** > **Reports** that will help you see what and how much you are selling.

In Infusionsoft, **sales totals represent gross sales.** In order to see net sales, you will need to export a sales totals report along with the credits issues report. The credits issued report will contain any manual credits you have recorded along with any refunds you have made through Infusionsoft.

If you issue a refund or credit outside of Infusionsoft, be sure to record this in Infusionsoft if you are using Infusionsoft for bookkeeping purposes.

To Customize the search criteria while viewing a report:



1. Go to **E-Commerce** > **Reports** and select the report you would like to create.
2. Click on the **Start over** button to clear past search criteria to create a new report.
3. Click on the **Edit Criteria/Columns** button to adjust search filters or add/remove columns from a report.
4. Click on the **Save** button to save the report to your Dashboard.
5. Click the **Print** button to send the report to your printer.

6. Click on the **Actions** button to export, apply tags , and many more options

Daily Sales Totals

Accounting Area: Sales

How it helps you: This report helps you see what and how much you are selling.

How it works: The Daily Sales Totals report shows you gross sales grouped by day.

Monthly Sales Totals

Accounting Area: Sales

How it helps you: This report helps you see what and how much you are selling.

How it works: The Monthly Sales Totals report shows you gross sales grouped by month.

All Sales Report

Accounting Area: Sales

How it helps you: This report helps you see what and how much you are selling.

How it works: The All Sales Report has more robust search criteria, including Tags and Products. You can use it to create a customized sales summary report. This report displays results by invoice. Click on a Sale link to view the details for a specific invoice.

All Sales (Itemized) Report

Accounting Area: Sales

How it helps you: You might use this report to analyze the percentage of sales with discounts or pay plans.

How it works: The All Sales (Itemized) Report gives a more detailed sales breakdown, including information like product, shipping, discounts, finance charges, and more.

Sales Totals (By Product)

Accounting Area: Sales

How it helps you: This report will help you identify your top selling products by month.

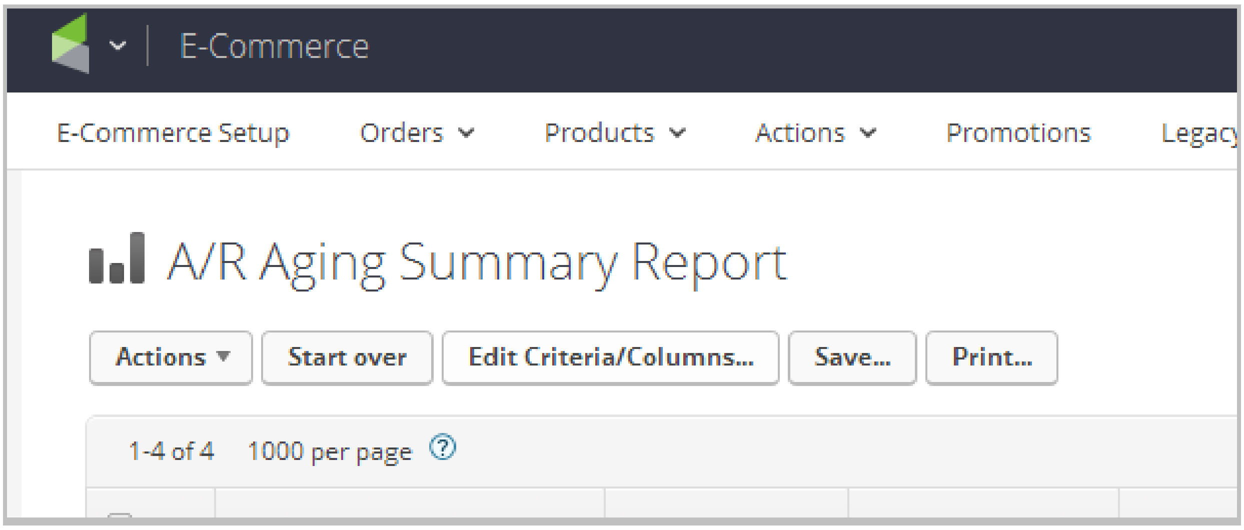
How it works: The results will show the number of orders per product, the total number of individual products ordered, the amount sold (amount sold = number sold X retail product price - This total does not include shipping or discounts), and more. Note: This report does not include subscription plan products. Click on a Product to view additional details for a specific product. The detail view will show invoice total, amount due at checkout (this total does not include future pay plan payments), balance due, and can include Promo code used. Click on Edit Criteria/Columns to add/remove columns from the detail report.

Cash And Credits (Net Sales) Reports

Last Modified on 08/02/2018 2:01 pm MST

There are several order reports (E-Commerce > Reports) that will detail payments received and forecast future payments so that you can manage your revenue/cash flow. You can view these reports in Infusionsoft or click on the Actions drop-down to export a report to your favorite spreadsheet program. If your primary role is bookkeeping/accounting, you may want to add a report to your dashboard.

To Customize the search criteria while viewing a report:



1. Click on the Start over button to clear past search criteria to create a new report.
2. Click on the Edit Criteria/Columns button to adjust search filters or add/remove columns from a report.
3. Click on the Save button to save the report to your Dashboard.
4. Click the Print button to send the report to your printer.
5. Click on the Actions button to export, apply tags , and many more options.

Monthly Payments

Accounting Area: Net Sales (Revenue)

How it helps you: This report helps you see the actual operating revenue (net sales) earned per month.

How it works: The Monthly Payments report displays a breakdown of payments received by month. This report shows how many payments have been received, the monthly total, and credit totals. You can filter this report by month, year, payment type, product, payment amount, and more.

Important notes: Click on **Show Details** to view payment details broken down by day.

Daily Payments

Accounting Area: Net Sales (Revenue)

How it helps you: This report helps you see the actual operating revenue (net sales) earned per day.

How it works: The Daily Payments report displays a breakdown of payments received per day. This report shows how many payments have been received, the daily total, and credit totals. You can filter this report by month, year, payment type, product, payment amount, and more.

Important notes: Click on a Date to view payment details broken down by day.

Payments Report

Accounting Area: Net Sales (Revenue)

How it helps you: This report helps you see the actual operating revenue (net sales.)

How it works: The Payments reports detail all of the actual payments received along with any credits issued within a date range. By combining payments with credits, you are able to view your net sales within a given date range. This is a detailed report, displaying the Sale (Order Name), the customer name, date, payment amount, and more. You can filter this report by month, year, payment type, product, payment amount, and more. Note: This report combines payments and credits. If you need a breakdown, use the Monthly or Daily Payments Report.

Cash Forecast Report

Accounting Area: General Financial Management

How it helps you: You can use this information to evaluate future cash on hand and to manage expenses.

How it works: The Cash Forecast Report shows you future product and subscription payments and how they are distributed over a specific date range.

Important notes: Click on the Details link to view the customer name and a description.

Credits Issued Report

Accounting Area: Net Sales (Revenue)

How it works: The Credits Issued Report shows you credits applied to subscription program payments. It displays date issued, total number of cycles, number of cycles already credited, credit amount per cycle, and credit notes.

Important notes: You can filter this report by date range, user, number of cycles, and credit amount.

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Money Owed To You (Accounts Receivable)

Last Modified on 08/02/2018 2:01 pm MST

There are several Accounts Receivable reports that will tell you which customers owe you money, how much they owe you, and total receivables due within a specific date range. You can use these reports to guide and analyze collection efforts.

You can find these reports by going to **E-Commerce > Reports** in the main navigation menu.

A/R Aging Summary Report

Bookkeeping Area: Accounts Receivable

How it helps you: The A/R Aging Summary Report helps you monitor past-due accounts, stay up to date on collections, and maintain a positive cash flow. Simply put, it helps you stay on top of delinquent accounts.

How it works: It shows you the number of invoices that are currently due (less than 30 days old) and the past due amounts in 30 day intervals, showing you how many accounts are overdue by the number of days. You can filter this report by current balance amount, total amount due (current + past due), and past-due interval (e.g. 90 days) Click on a person's name to view the amount paid and balance due in the Account Summary section of their Person Record.

Important notes: With some fancy billing automation in place, you can notify yourself (or your staff) as soon as a subscription or payment plan declines. With this information, you can reach out to the customer as quickly as possible to reduce churn rate (attrition.)

Monthly Receivables

Bookkeeping Area: Accounts Receivable

How it helps you: The Monthly Receivables report helps you monitor past-due accounts so you can maintain a positive cash flow.

How it works: The Monthly Receivables report shows you a summary of orders with payments due for each month. This report helps you monitor money owed to you by others. It displays the number of payments due and the total amount due. You can filter this report by lead source, year, month, product, and more. Click on Show Details to view a list of the individual orders included in these totals. Click on the Date link to view a summary of daily receivables.

Important notes: You can access the Daily Receivables report by clicking on a specific month in the Date column. To filter the report or edit the column layout, click the Edit Criteria/Columns button.

Daily Receivables

Bookkeeping Area: Accounts Receivable

How it helps you: The Daily Receivables report helps you monitor past-due accounts so you can maintain a positive cash flow.

How it works: The Daily Receivables report shows you a summary of orders with payments due on a specific date. This report helps you monitor money owed to you by others. It displays the number of payments due and the total amount due. Click on a Date link to view a list of the individual orders included in these totals.

Important notes: To filter the report or edit the column layout, click the Edit Criteria/Columns button. You can filter this report by lead source, year, month, product, and more.

Receivables

Bookkeeping Area: Accounts Receivable

How it helps you: The Receivables report shows you a detailed list of orders with a balance due on a specific date. This is a detailed report, displaying the Sale (Order Name), the customer name, sale total, payment due, and more. You can filter this report by date, balance due, Tag, lead source, products, and custom fields. You can also look up a specific invoice by ID number. This report is intended to help you keep a positive cash flow.

How it works: This is a detailed report, displaying the Sale (Order Name), the customer name, sale total, payment due, and more. You can filter this report by date, balance due, Tag, lead source, products, and custom fields. You can also look up a specific invoice by ID number.

Failed Invoice Report

Bookkeeping Area: Accounts Receivable

How it helps you: You can use this report to personally contact customers to resolve credit card issues, to manually initiate a billing Follow-Up Sequence (if you are not using Purchase and Billing Automation), or to investigate potential issues with your merchant account. You are able to filter this report by invoice total, balance due, date range, product, and more.

How it works: The Failed Invoice Report displays all failed auto charge transactions for subscription programs and payment plan installments. It only lists the charges processed through a merchant account linked to your Infusionsoft system. It will not show manually processed transactions (e.g. swiped credit cards, check payments, etc.)

Important notes: Click on the Actions button and select Manage Failed Invoices to void (write off) the listed invoices, remove the voided invoices from the Subscription Program, and (optional) select an Action Set to run. You can add a Failed Invoice Write-off Action Set through Setup > Action Sets. This action set may need to remove tags, cancel the subscription, and send internal / external notification emails.

Credit Card Report

Bookkeeping Area: Accounts Receivable

How it helps you: You can use this report to monitor credit card expiration dates and manually follow up with customers whose cards are due to expire (if you are not using the Credit Card Expiration Order Triggers.)

How it works: The Credit Card Report allows you to look up a person using the last 4 digits of their credit card number. This report will also show you credit cards that have an error status, as well as review total charges and refunds for a specific credit card. You can filter this report by Tag, status, card type, charge date, expiration date, and more.

Important notes: The Credit Card Expiration Trigger mentioned above is a critical piece in automating your business. Take a look at the Purchase and Billing Automation section to see a list of powerful tools you can use to make your life easier and your bottom line larger.

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View Income (Net Income)

Last Modified on 08/02/2018 2:01 pm MST

There are several order reports (**E-Commerce > Reports**) that will tell you how much money you are making after paying commissions. Note: These numbers are based on sales rep and partner commissions tracked through the Infusionsoft Referral Partner component.

Net Income by Invoice

The Net Income by Invoice report shows the amount of income generated per invoice, after paying commissions. This report displays the order date, invoice ID, customer name, affiliate name, invoice total (TotalInvestment), unpaid balance, total of payments received (InvestmentReceived), lead & sale commission, and net income (income minus commissions). Use this report to monitor affiliate commission programs. You can filter this report by order date, customer name, affiliate name, and invoice total.

Net Income by Product

The Net Income by Product report shows the amount of income generated per product, after paying commissions. This report displays the order date, product description, total amount of revenue generated, total of payments received, total of potential commissions, actual commission earned (based on payments received), net sales amount (payments received minus earned commissions), and net sales percentage (earned commissions divided by payments received). Use this report to monitor commission amounts for each product so you can maintain a reasonable per-product profit margin. You can filter this report by order date, customer name, affiliate name, and invoice total.

Leadsource Income

The Leadsource Income report shows the total contacts, orders, and income generated by each lead source, as well as average income per order. You can use it to identify your most profitable lead sources. This report can be filtered by lead source, date range, and sales totals.

Customer Lifetime Value Report

The Customer Lifetime Value Report shows a summary purchase history by customer. It displays the total purchased, total paid, number of order invoices, average transaction size, lead source, and more. Use this report to identify your most loyal customers, evaluate company health (repeat business), and monitor efforts to increase average transaction size. You can filter this report by invoice date range, average transaction range, location, Tags, products, date created, and more.

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View Failed Credit Card Transactions

Last Modified on 08/02/2018 2:02 pm MST

1. Go to **E-Commerce > Reports**
2. Click on **Credit Card Report**
3. Click on **Start Over** to reset the search results
4. Click on **Misc Criteria**
5. Choose the failed criteria you want to search for.
6. Scroll down to the bottom and click the **Search** button.

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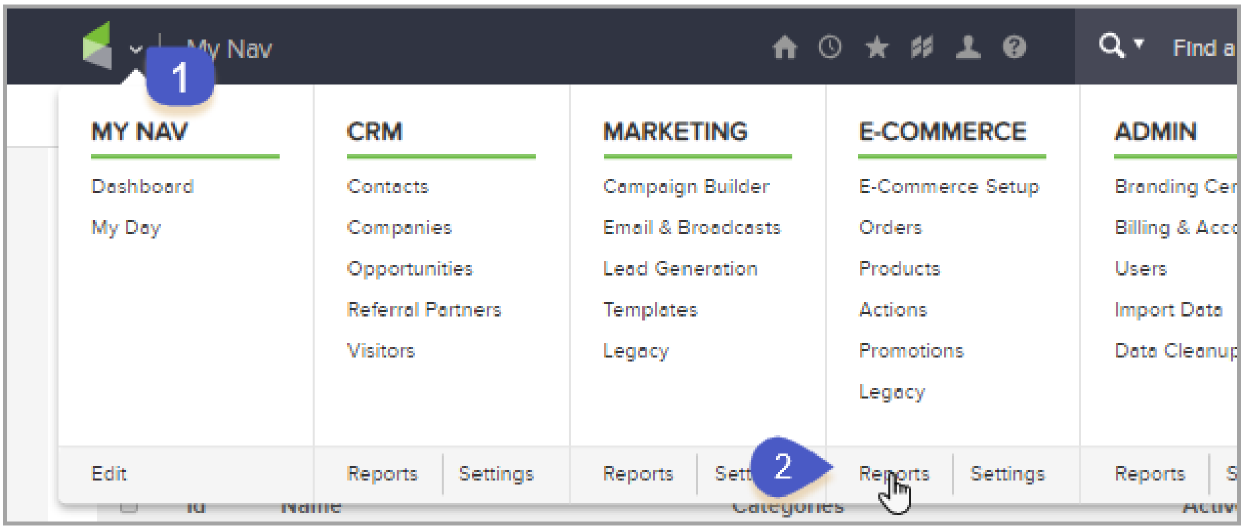
How Can I Be Notified For Failed PayPal Orders

Last Modified on 09/07/2018 1:53 pm MST

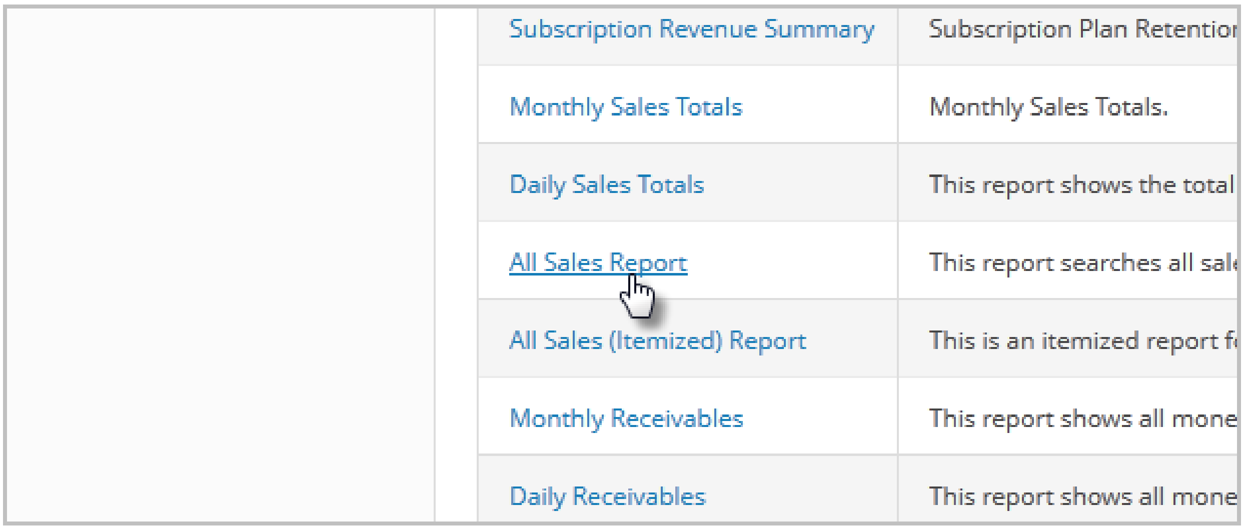
Billing automation triggers do not currently run on failed PayPal payments. Clients can cancel payments via their PayPal account, remove their billing information, or have payments decline with no feedback into Infusionsoft for automation. To remedy this, here is how to create a report that shows failed orders for review.

Note! There isn't specific criteria for PayPal since the credit card information is stored directly within your PayPal account. This process is to locate **all** failed orders.

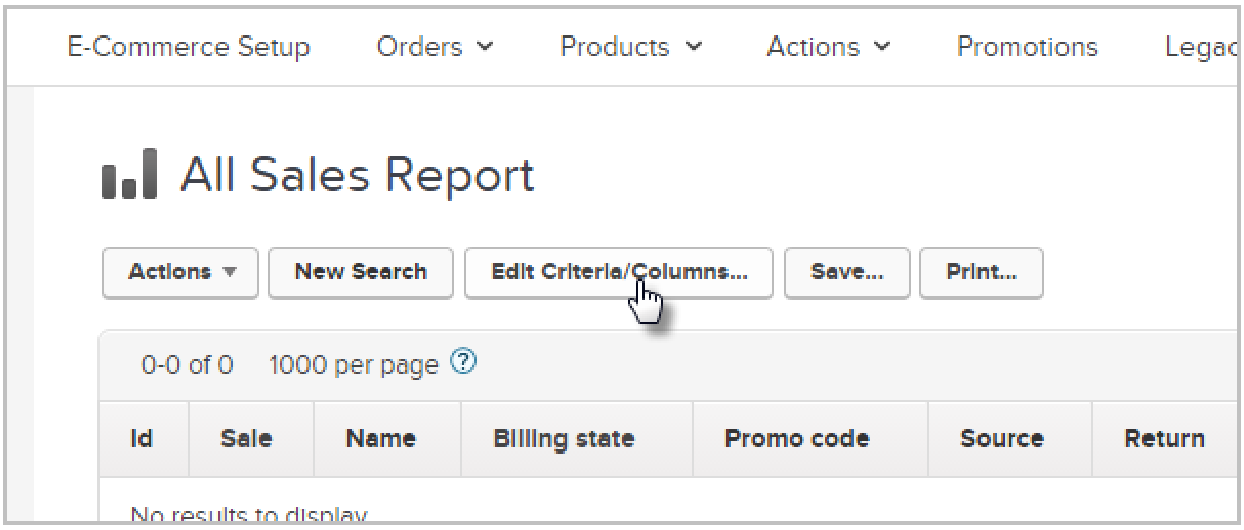
1. Navigate to **E-Commerce** > **Reports**



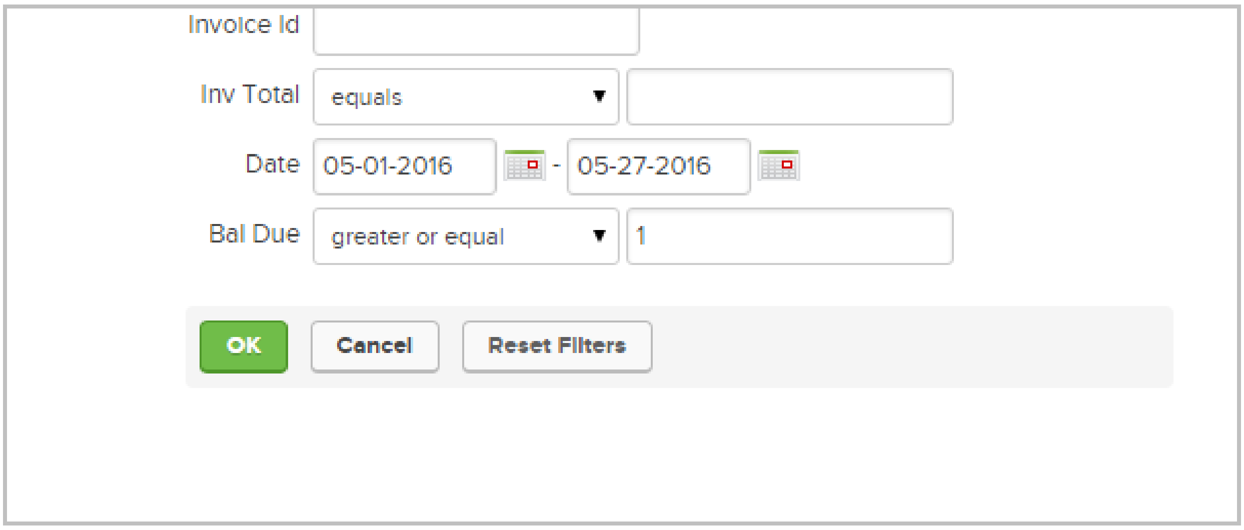
2. Click On **All Sales Report**



3. Click on **Edit Criteria/Columns** or **New Search**

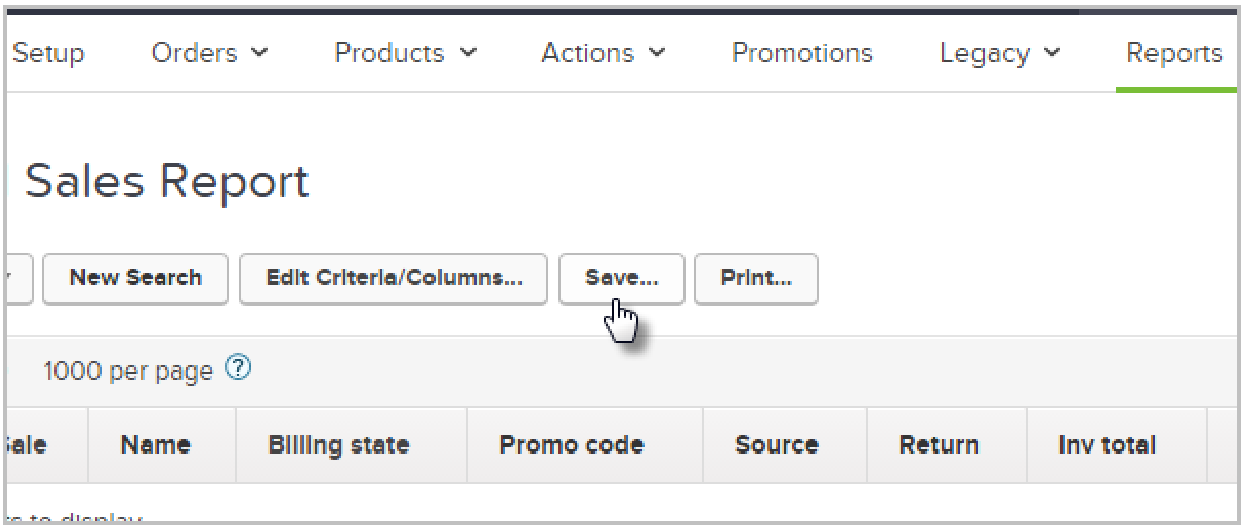


4. Set Balance Due to **greater or equal** to **1** and Click **OK**



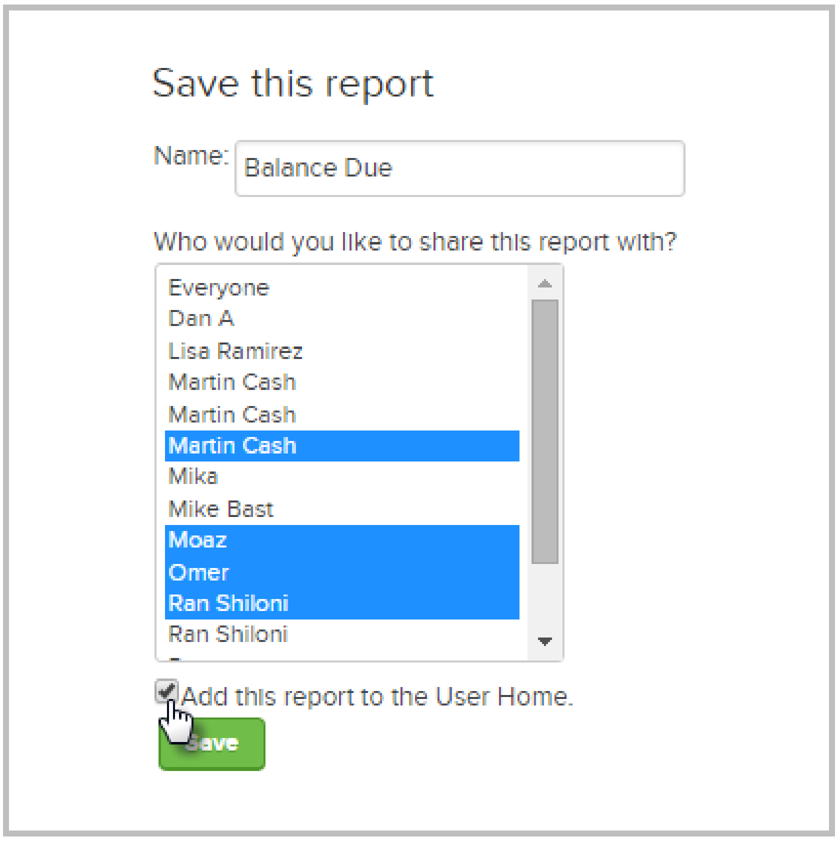
5. Click **OK**

6. Click **Save.** Type a new name for this report and click **Save**



Pro-Tip! You can also add this report to your home page dashboard and have the report emailed to you automatically.

Follow the steps in this Article to have this new report emailed to you and other users.



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Tax Reporting

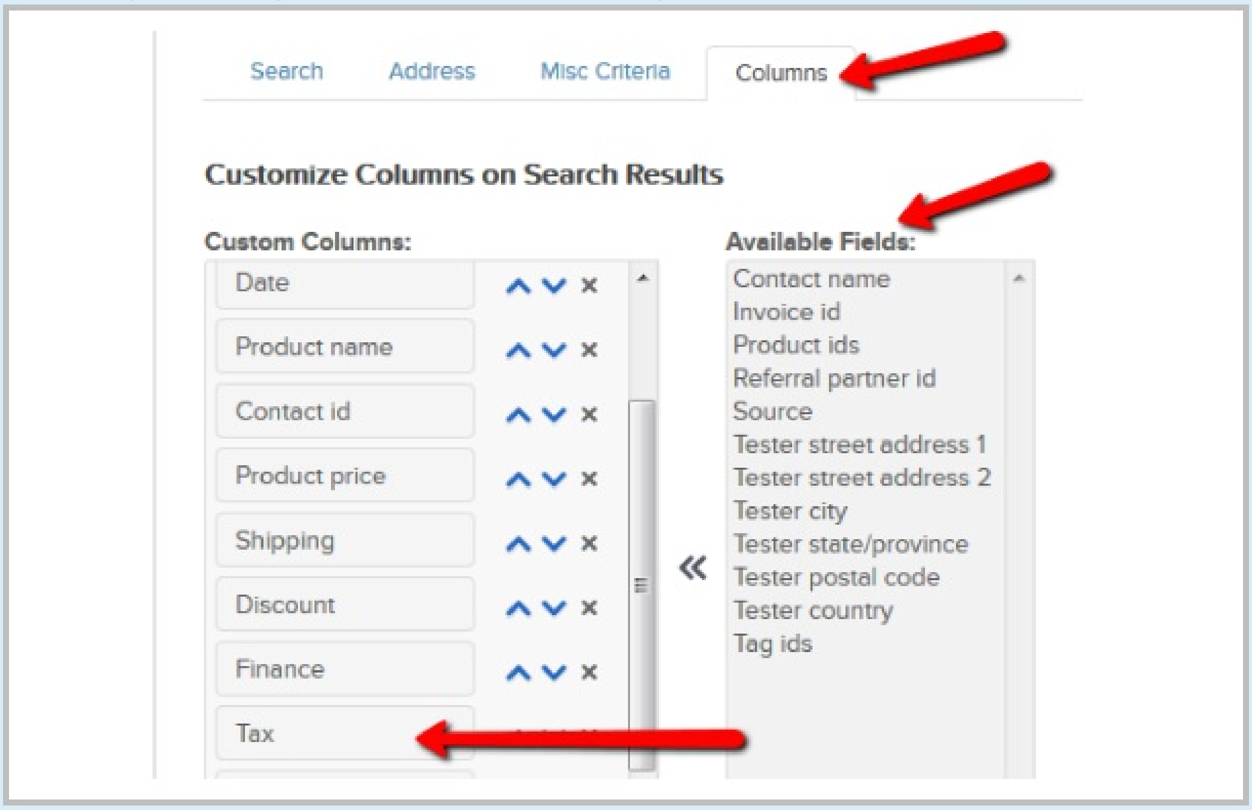
Last Modified on 08/02/2018 2:02 pm MST

Pull a report that shows the amount of sales tax charged on your orders. The **All Sales (Itemized) Report** can display that amount in one column.

1. Navigate to **E-Commerce** > **Reports** and click the **All Sales (Itemized) Report**

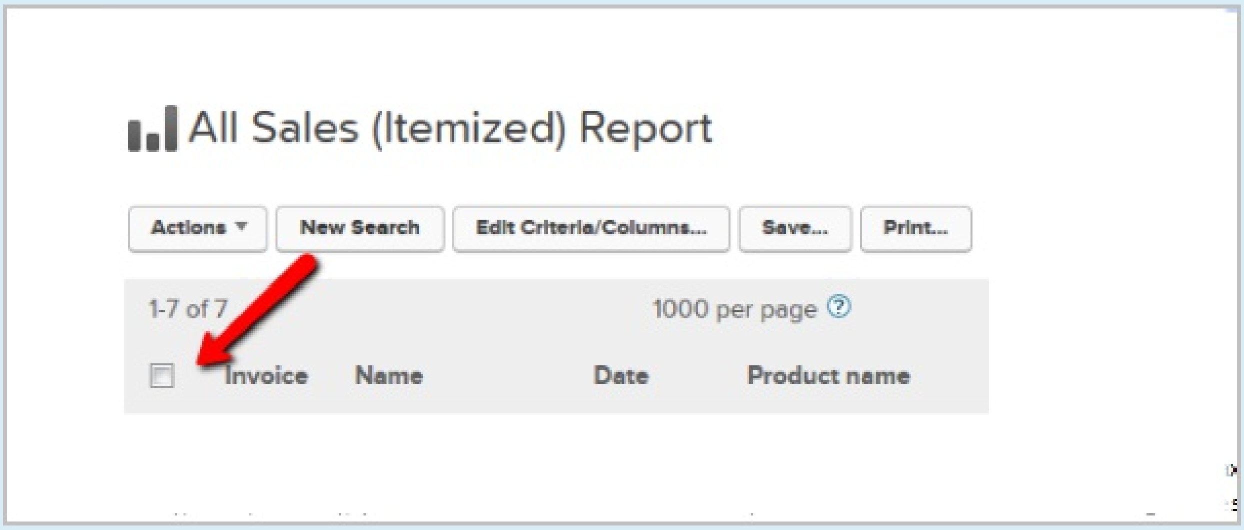
2. Enter in the specific date range for the report you wish to run

   Pro-Tip! Before clicking on the **Search** button, click on the Columns tab and move the **Tax** field from the list of **Available Fields** to the left side of **Customer Columns**. Do this by selecting the **Tax** field and clicking the double arrows.

3. Click **Search** to view the results, and see tax listed in a column on the report

   Pro-Tip! You can export a copy of this information to Excel via a CSV file to better filter the report and to use for your own records. To export, first make sure to click the “Check All” button on the report in Infusionsoft. After all data is selected, click on Actions and select “Export”. Choose the fields you want to export to Excel (make sure Tax is selected) and scroll to the bottom to “Process” the export.



Pro-Tip! The total of the tax charged is listed in the Tax Column. If you are charging multiple types of tax ex. City/State/Country, you can use Filters in Excel to sort by locations. Be sure to add the Billing Address columns to your output.

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Custom Fields Vs Tags

Last Modified on 08/02/2018 2:03 pm MST

I'd like to address an issue that has plagued Infusionsoft users since the dawn of time (I suspect it has anyways.) "When do I use a custom field, and when do I use a tag?" There has always been an air of ambiguity surrounding this question, with vague definitions and unique use cases and a long list of exceptions; but today I'd like to provide some information that will help you decide which is appropriate for your specific scenarios.

First, I'll discuss what each of these have in common, and then I'll outline a few of their key differences and lastly I'll leave you with a few guidelines for deciding what you need.

Tags and Custom fields are both great ways to store information about a contact. Tags and Custom fields are both easily searchable, and can make filtering through your list to find a targeted audience much easier. Both can also be used in a campaign decision diamond to route contacts down the appropriate path and create a more customizable experience for that customer.

Now, where do they differ? Well, first and foremost there are no limits to the number of tags you can create. There are however limits on custom fields. You can create up to 100 Custom Fields for each of the different types of records. You can also apply an unlimited number of tags to a contact record. Whereas, generally you can only store one piece of information in a custom field (the exception being list box fields.) This means, tags will accumulate over time, but a custom field will only retain the most recent piece of information supplied.

Another key difference is that Tags can be used to trigger automation. By applying a tag, you can trigger a campaign builder goal, therefore firing off automation. Yes, if a custom field is filled out via a webform, or internal form , either of those can also achieve campaign goals, but simply populating a custom field on a record cannot inherently fire off a campaign builder sequence.

The last difference to discuss here is that values placed in custom fields can be merged into emails and tasks to personalize the email content or task details on a per contact basis. Tag information can be used to route contacts to send the appropriate email or task, but cannot be used to personalize the content itself like the other merge field s.

So, those are the similarities and differences, but how do I decide which one to use? Well, the hard truth is it's going to be a unique case by case decision for you; but let me give you some guidelines to help make that decision easier.

After reading the steps below, hopefully you'll get a good foundation of information to arm you in making decisions as you set up, or refine your CRM. These are primarily suggestions to give you some guidance, but you may find that you need to deviate from one of these rules for a one-off type scenario and that's okay.

Remember, each business is unique, but using these guidelines will give you a head start in designing an efficient CRM that is easy to search, grow, and scale!

- If the information is unique to that particular contact record, then you should use a custom field. (i.e. Dog's name, license plate number, favorite ice cream flavor) However, if the information helps segment them into a group of like individuals, you should can use a tag. (i.e. Dog Owners, BMW Drivers, Ice Cream Fans.)
- If you will need to merge this information into an email at some point, you'll want it in a custom field. For example, if you tag them as "ice cream fan", you won't be able to start your email "For an 'ice cream fan' like you…". However, if you have a custom field that lists their favorite ice cream flavor, you can start your email "Since I know you love 'mint chocolate chip' ice cream, I thought you'd enjoy this…".
- If more than one piece of information can be true, you will want a tag. This one can be tricky to wrap your head around, but if you're creating a custom field for "Supporter of" and you list Liverpool, Manchester U and Arsenal, they can only be a supporter of one of those teams. However, if you use tags, then you open the possibility that someone might support more than one club (in this scenario it's probably less than likely, but you get the idea.)
- If you need to trigger automation as a result, you'll want a tag. If you need something to happen based on the new knowledge you have, you will likely want to create a campaign starting when a specific tag is applied. You can trigger a campaign to start when a custom field is populated, but there are some limitations regarding what the value of the field is, and how it was populated.

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Choose Custom Field Types

Last Modified on 08/02/2018 2:03 pm MST

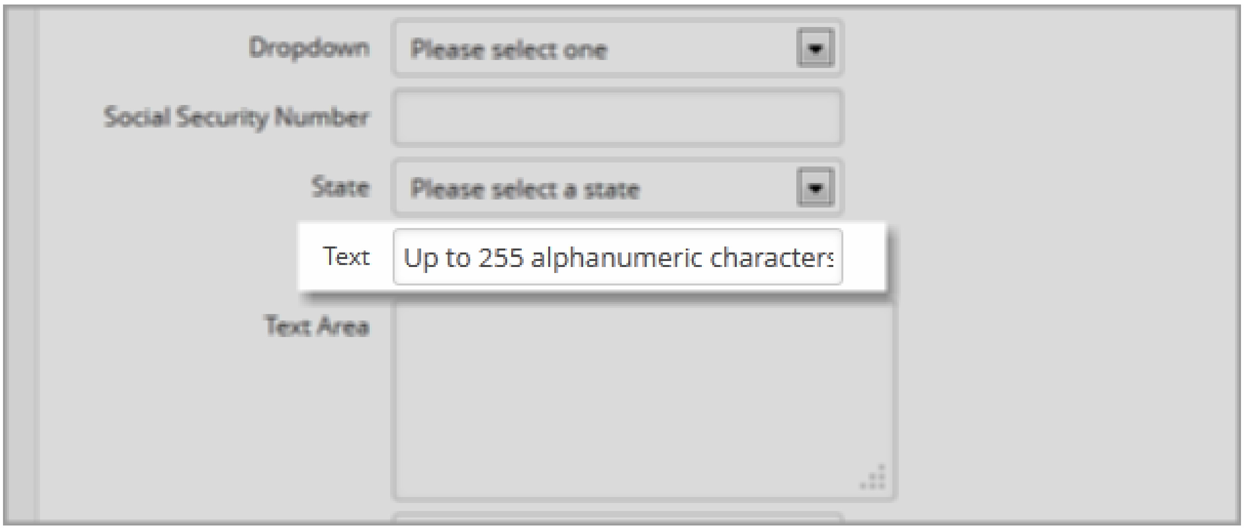
You can add up to 100 custom fields per record type in Infusionsoft (contact, referral partner, company, task, opportunity, order, subscription.) The field type you choose should correspond with type of data you want to store in a field that satisfies your end goal for the data (i.e. reporting, merge field, etc.)

Changing a Custom Field Type! Please note that you cannot change an existing field type to another type. For example, if you create a radio button and then later decided you want a drop-down box instead, you will have to create a new drop-down field and remove the old one. In many cases, however, you can export data out of your old fields into a csv and then re-upload the data into the new field.

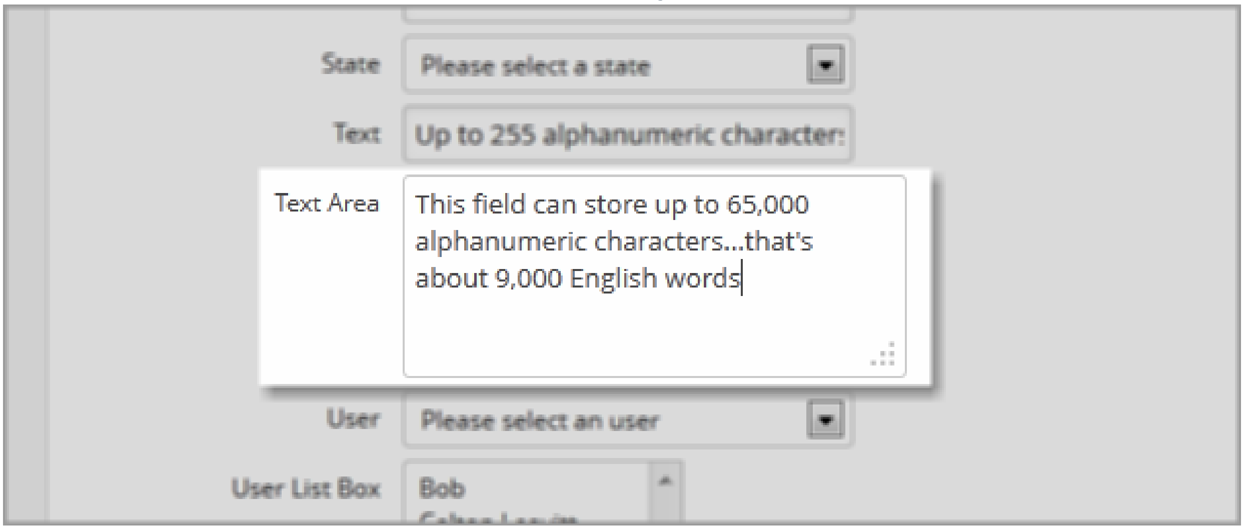
Free Form Text and Number Fields

Use the free form fields to store variable information that is custom for each person (i.e. favorite restaurant.) These types of fields are not as useful for reporting; they are most commonly used as reference fields and merge fields in emails, letters, and task templates. The number fields can also be used to calculate sums and averages when a report is exported from Infusionsoft or created with the little box o' stats home page widget.

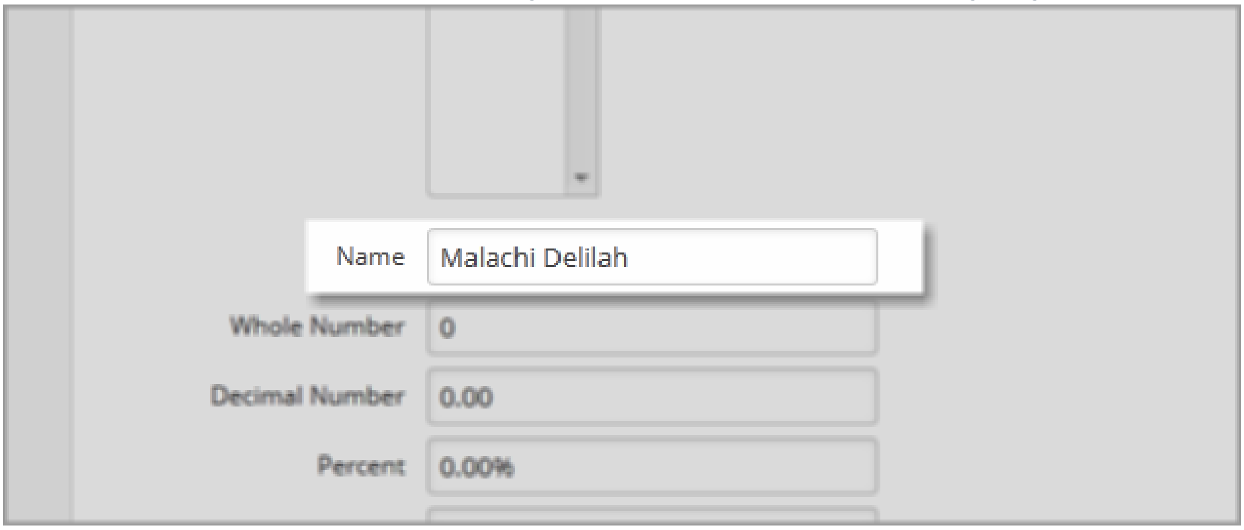
- **Text**: Stores all types of data (letters, numbers, and symbols), but is limited to 255 characters. It is best used for short-answer input.



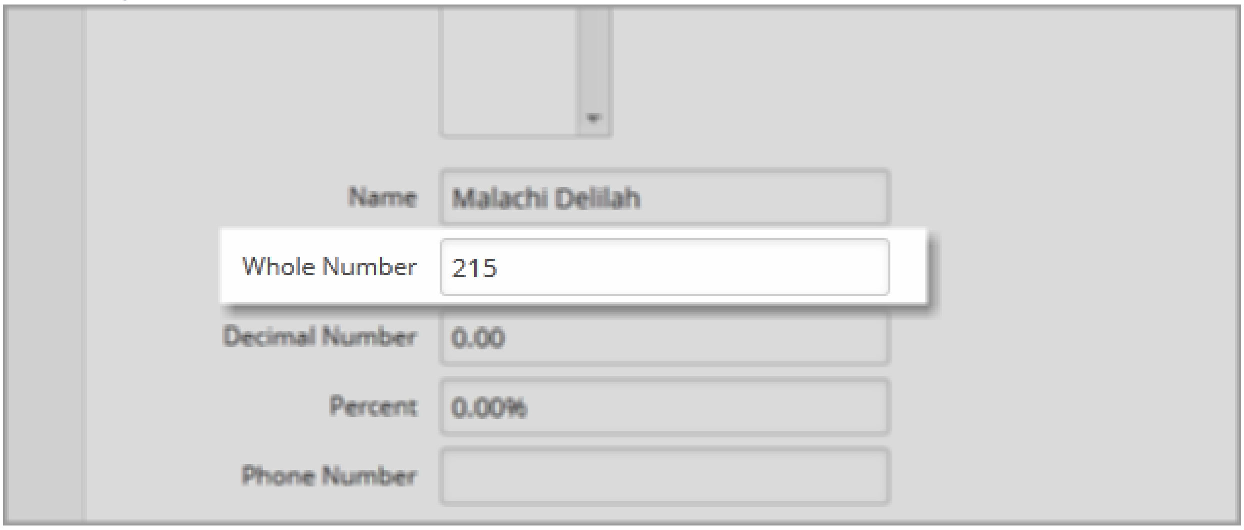
- **Text Area**: Stores all types of data (letters, numbers, and symbols). Allows for about 65,000 characters, which is about 9,000 English words. It is often used to capture open ended feedback from a web form (i.e. survey or contact us.)



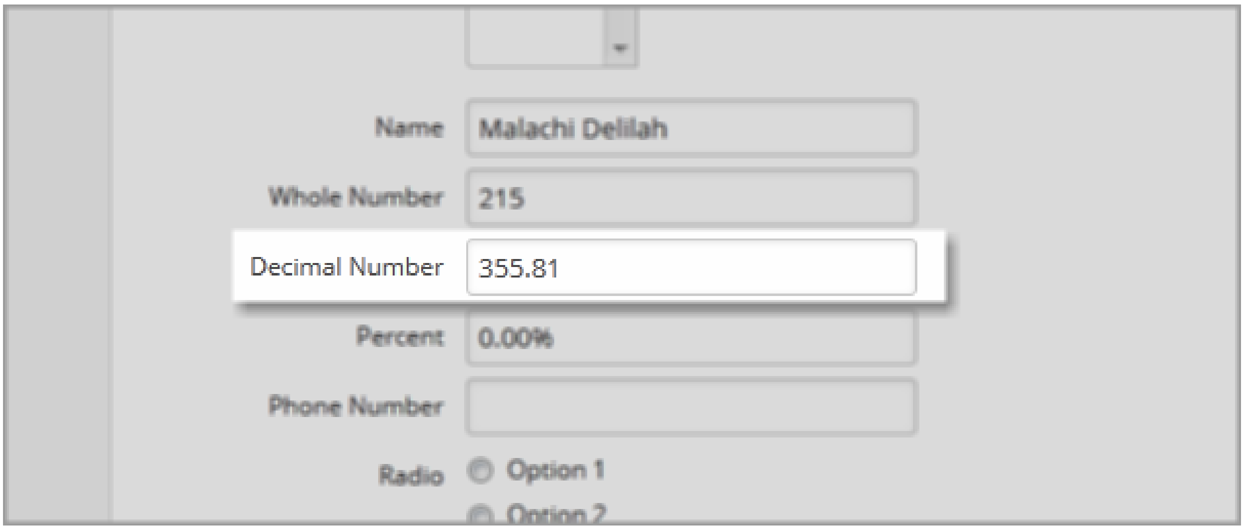
- **Name**: Similar to a text field, but designed to be like the standard first and last name fields. It allows you to search by first or last name. You can create two of these; one for first name and one for last name if you want even more flexibility in your search.



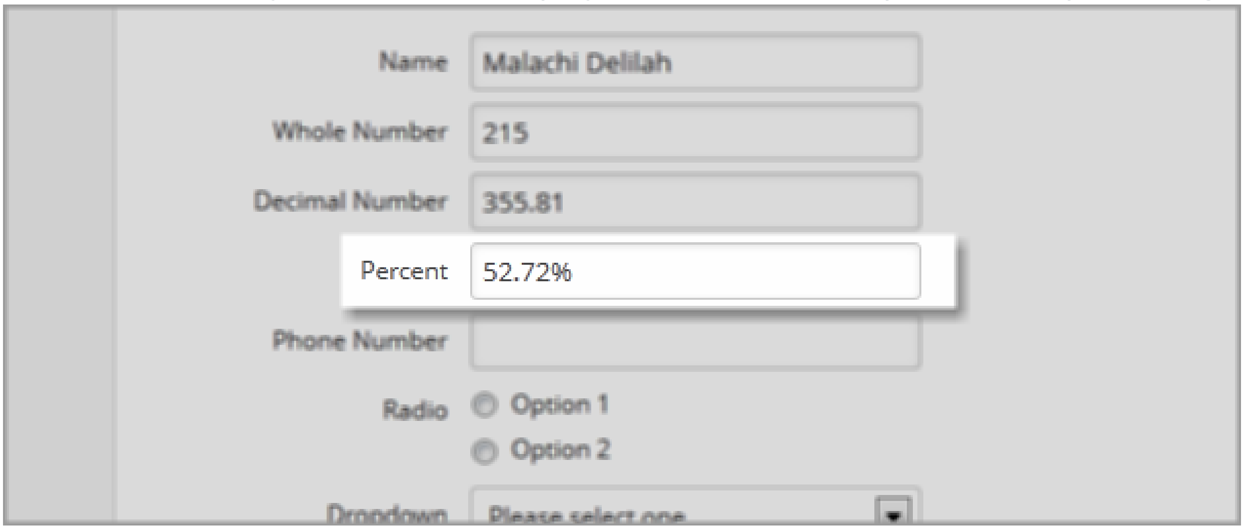
- **Whole Number**: Stores whole numbers only. It will not accept letters, symbols, or decimal points.



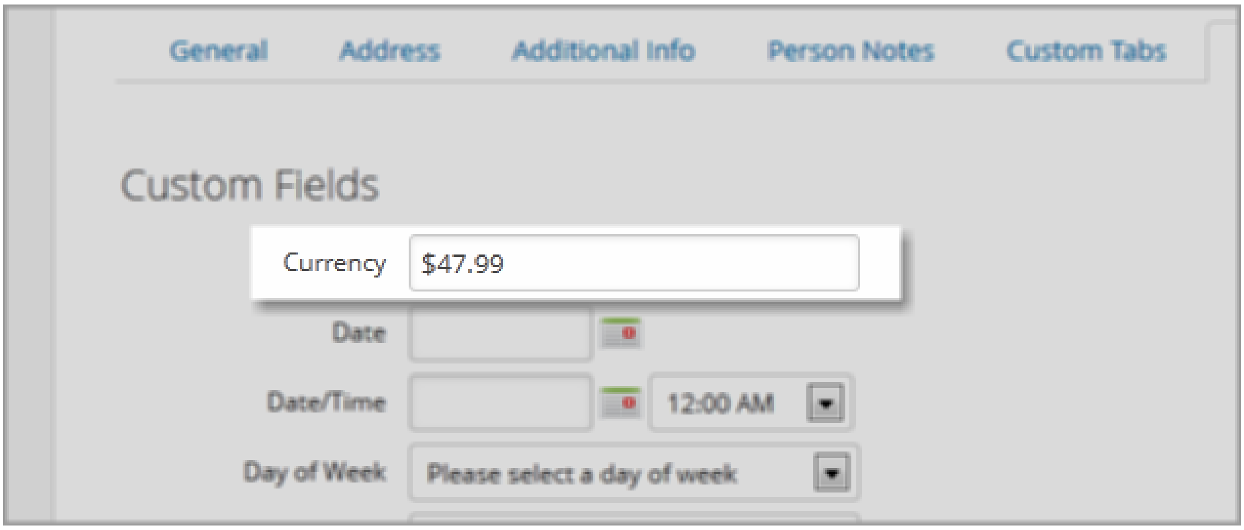
- **Decimal Number**: Stores decimal numbers. It will not accept letters or symbols. The decimal will round to the hundredths.



- **Percent**: Stores any number, but displays it with a decimal point and a percentage (%).



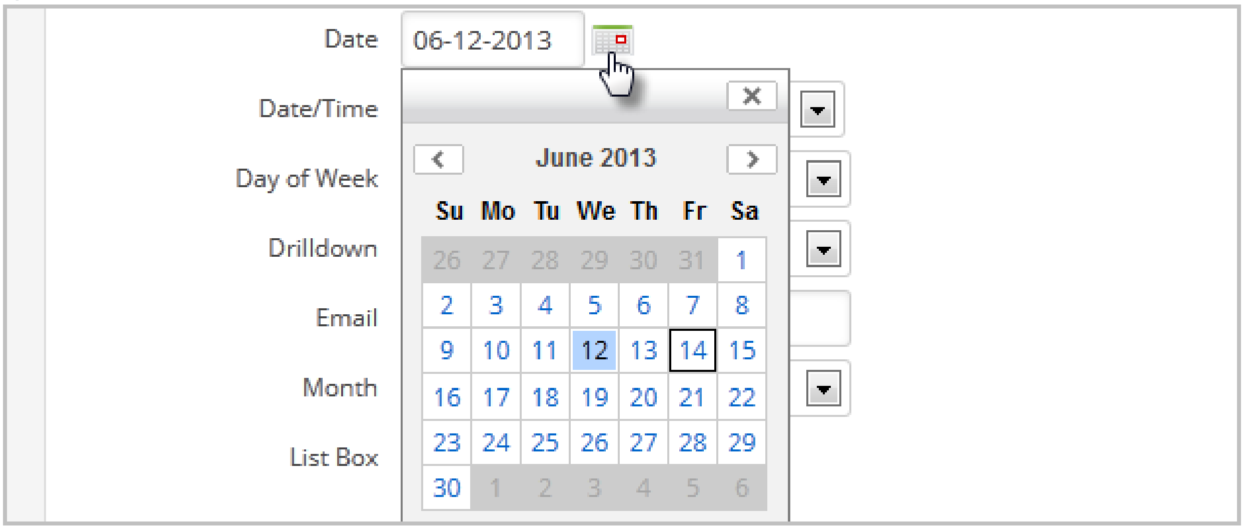
- **Currency**: Stores any number, but displays it with a decimal point and a dollar sign ($).



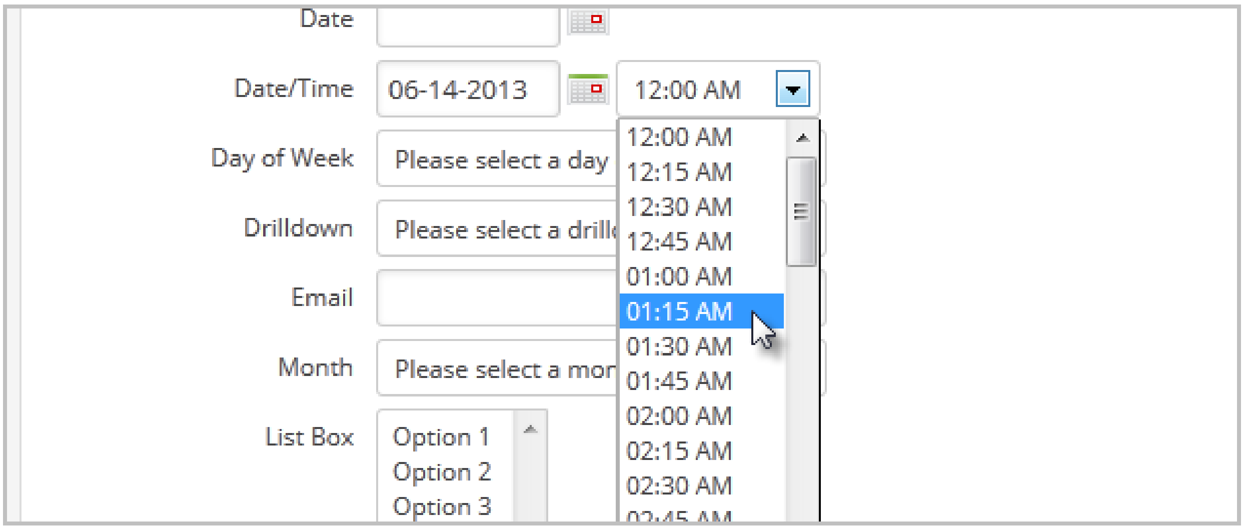
Date Fields

Use date fields to store custom date information like birthdays, special events, renewal dates, etc. The dates can be merged into emails, letters, and task templates to personalize them and to use them as event reminders.

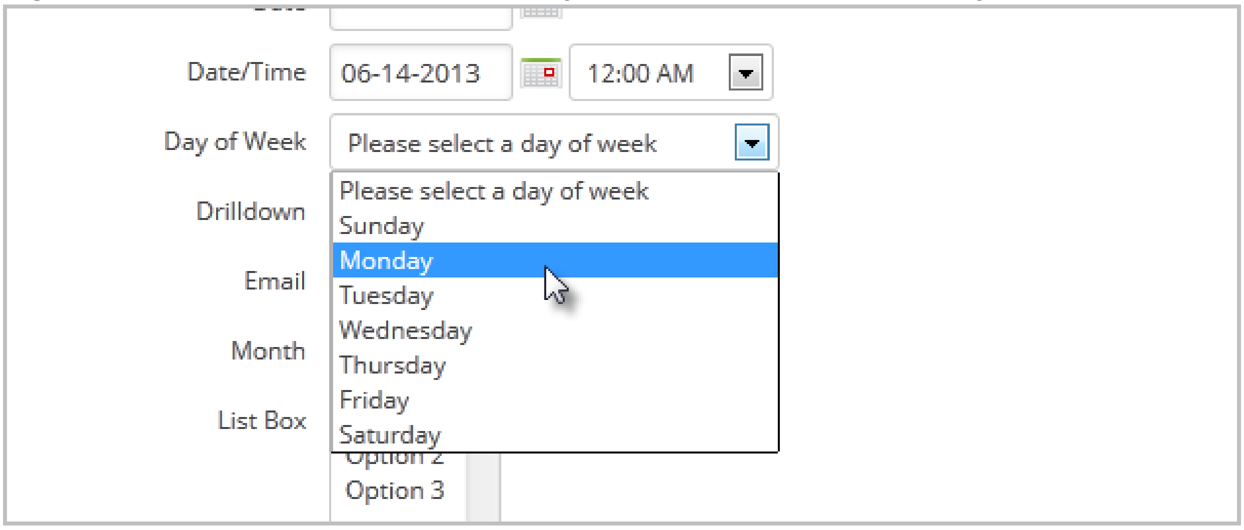
- **Date:** Stores a custom date. Use date fields to track event dates (i.e workshop, appointment, renewal), merge the date into follow-up communications, and to schedule steps within a campaign sequence. Note: The date picker calendar icon does not show up on web forms.



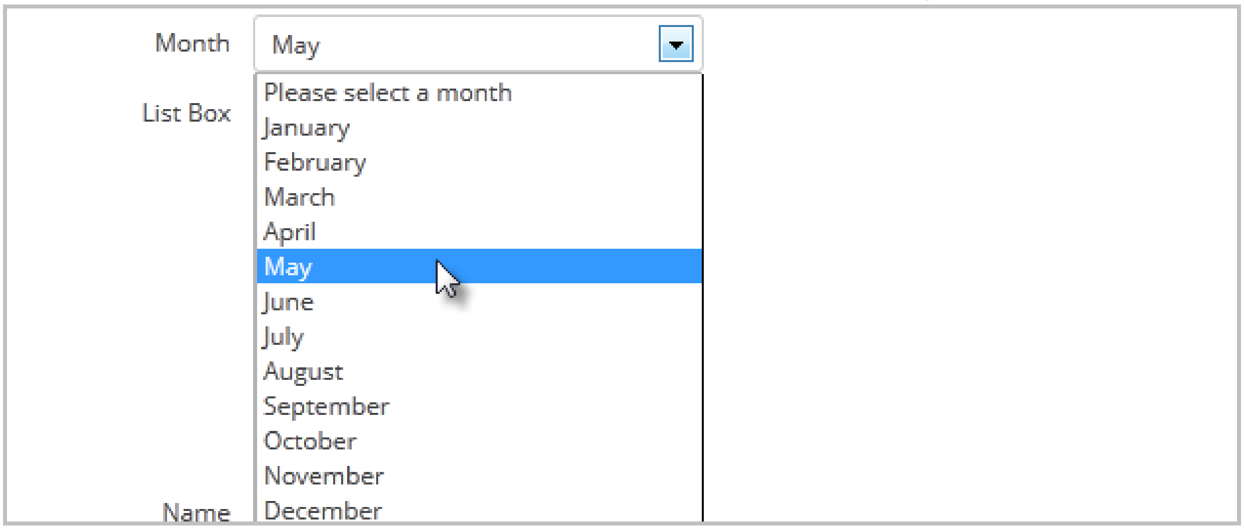
- **Date and Time:** Stores a custom date and time that can be merged into follow-up email, letter, and task templates. It is also used to schedule steps within a sequence.



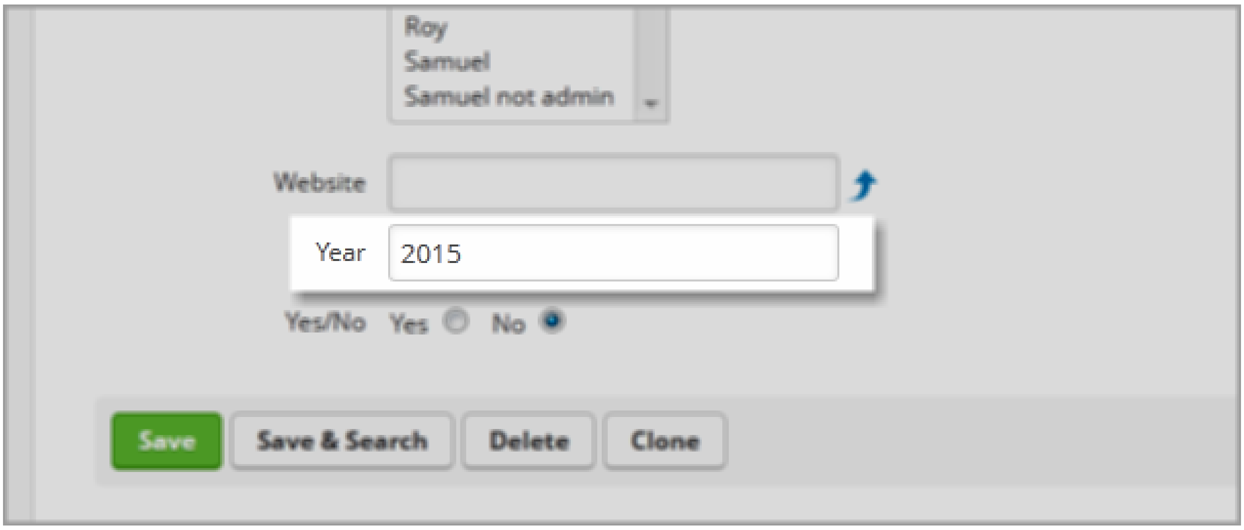
- **Day of Week**: Stores the name of a day in text format (i.e. Monday.)



- **Month**: Stores the name of a month in text format (i.e. January.)



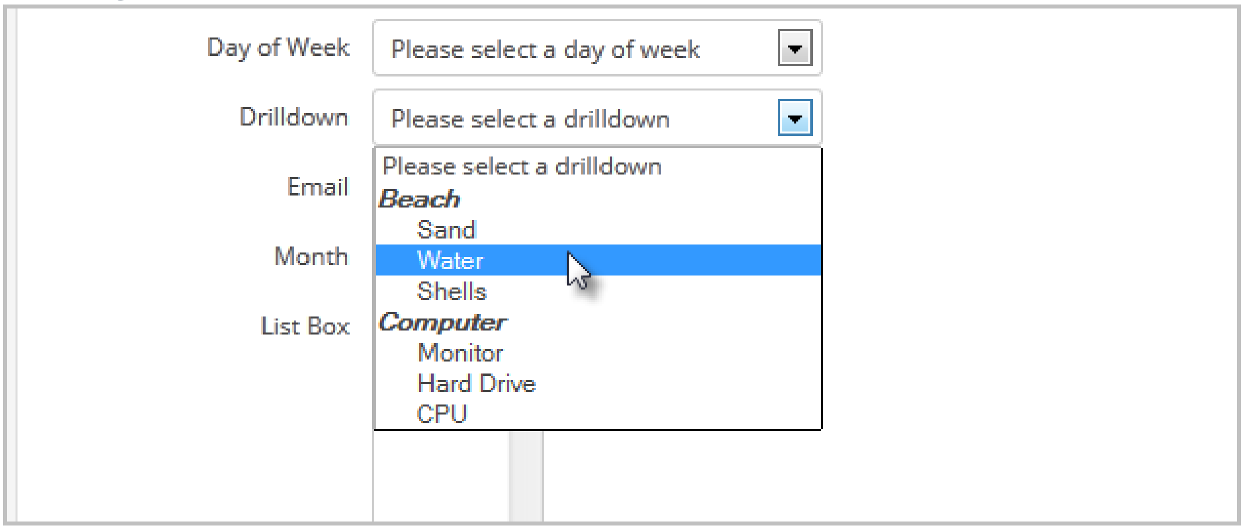
- **Year**: Enter a year in numerical format (i.e. 2016.)



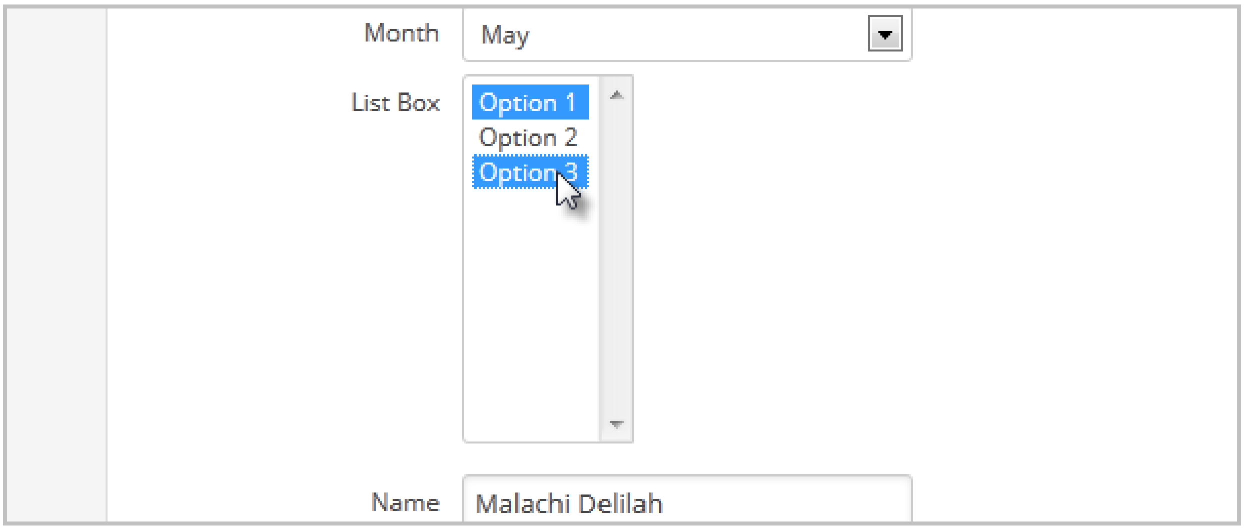
Option Lists

Use option list fields to create solid criteria for searching and reporting in Infusionsoft. You predefine a limited number of options for each field instead of allowing users and website visitors to enter whatever they want.

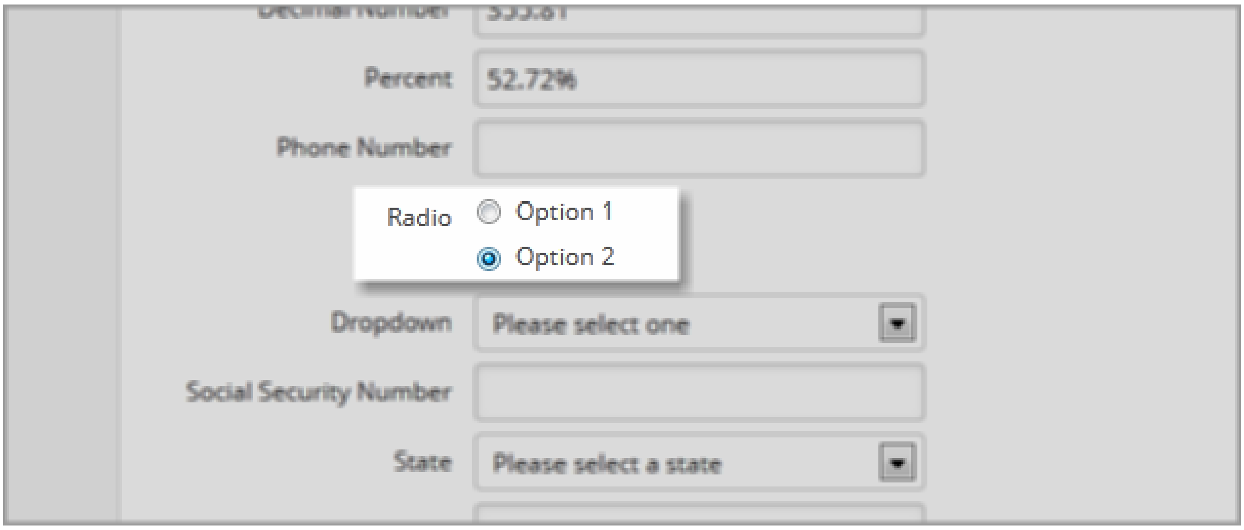
- **Drill-down:** Creates a drop-down list that has multiple main categories with multiple subcategories.



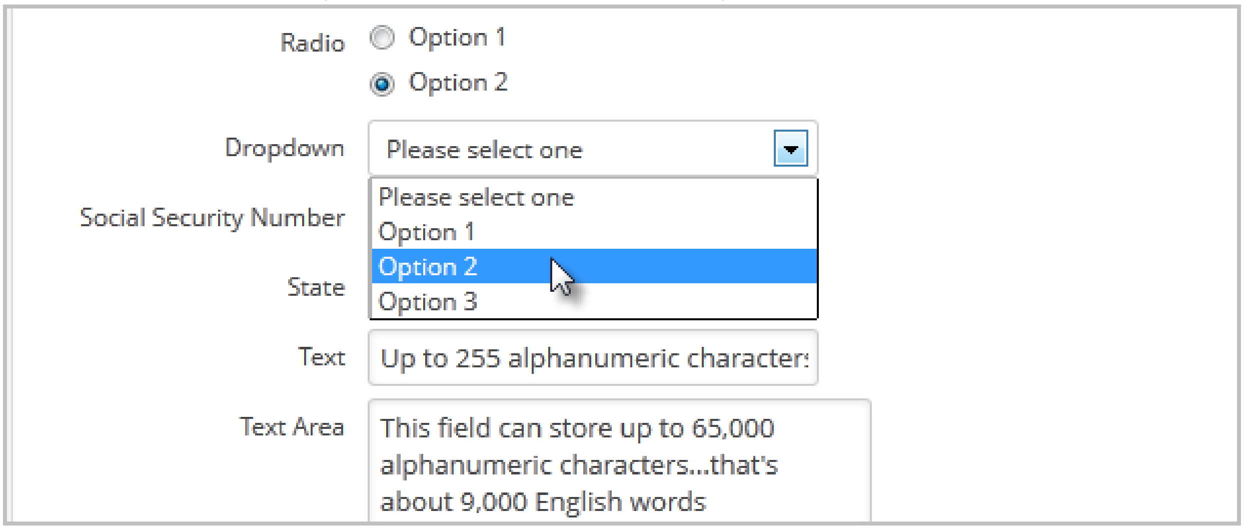
- **List Box:** Creates a list of options. The list box permits multiple selections when a user or website visitor holds down the CTRL key on their keyboard.



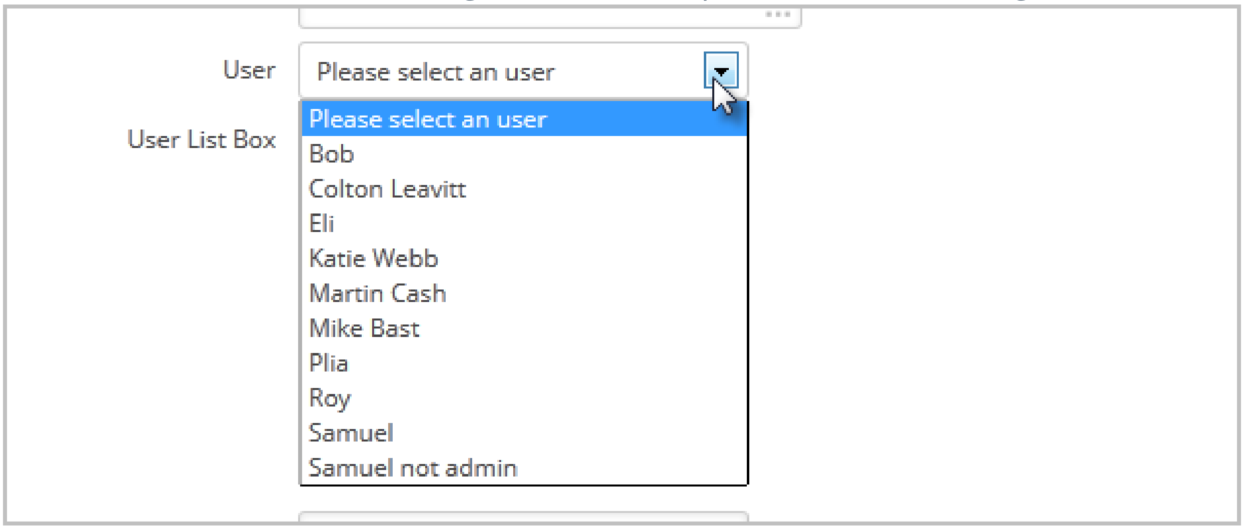
- **Radio**: Creates radio button options that all display at once. Only one option can be selected at a time.



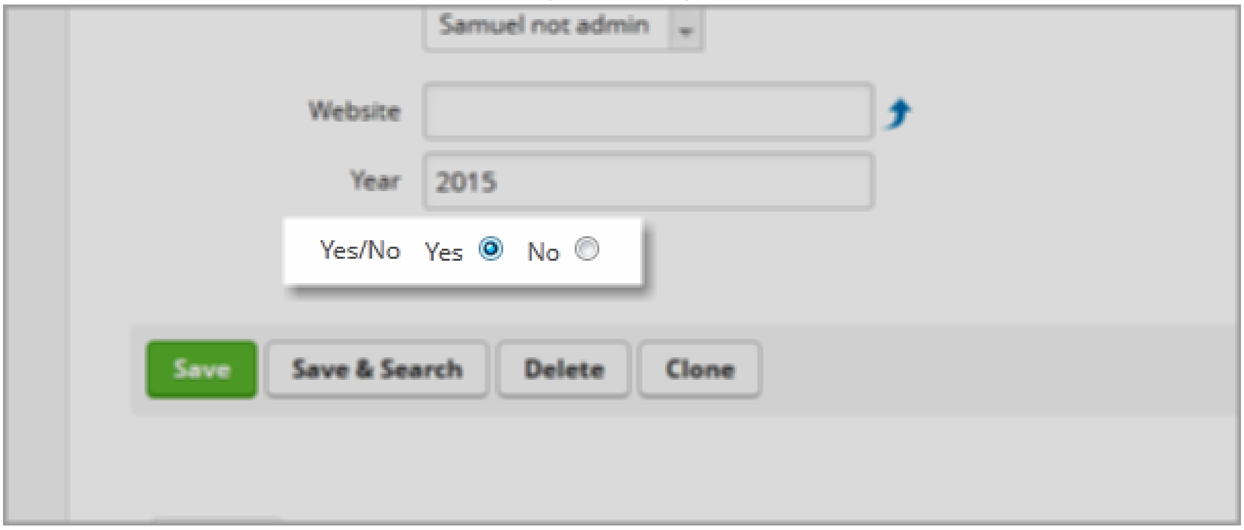
- **Drop-down**: Creates a drop-down list with a limited number of options. The user must click on the list to view and select from the options. Only one option can be selected at a time. You can add up to 499 items in each drop-down list.



- **User**: Lists the names of your Infusionsoft users. This can be used to merge in multiple user's names into email messages (i.e. sales rep and account manager.)



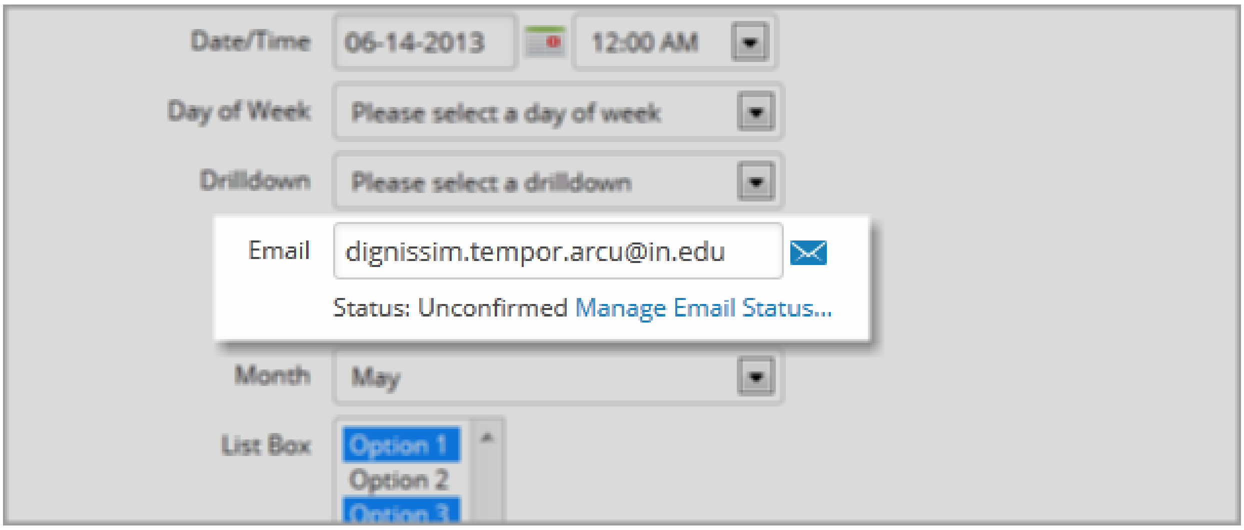
- **Yes / No**: This is a radio field that only has 2 options: *Yes* or *No*.



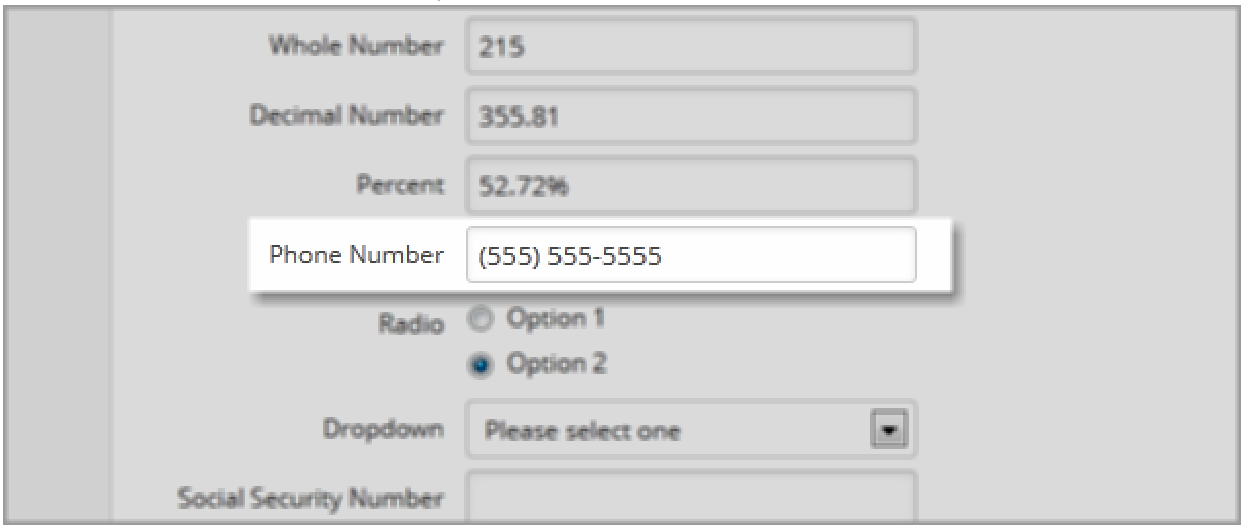
Specially Formatted Contact Fields

Use the specially formatted contact to expand the number of standard contact fields.

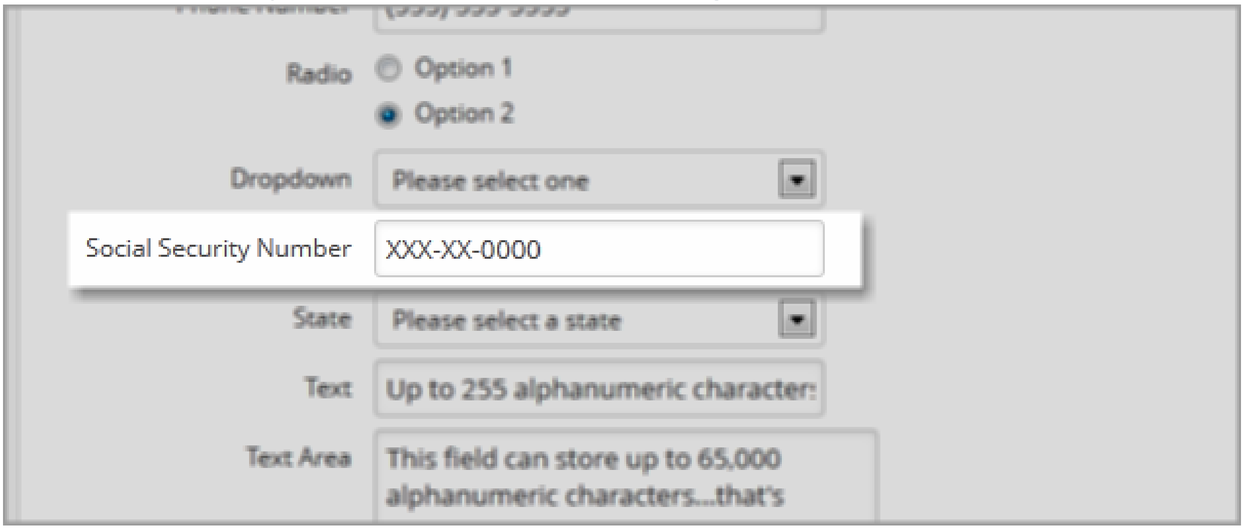
- **Email Address:** Stores an additional email address with a "send email" icon. Use this field to add more than 3 email addresses to a contact record.



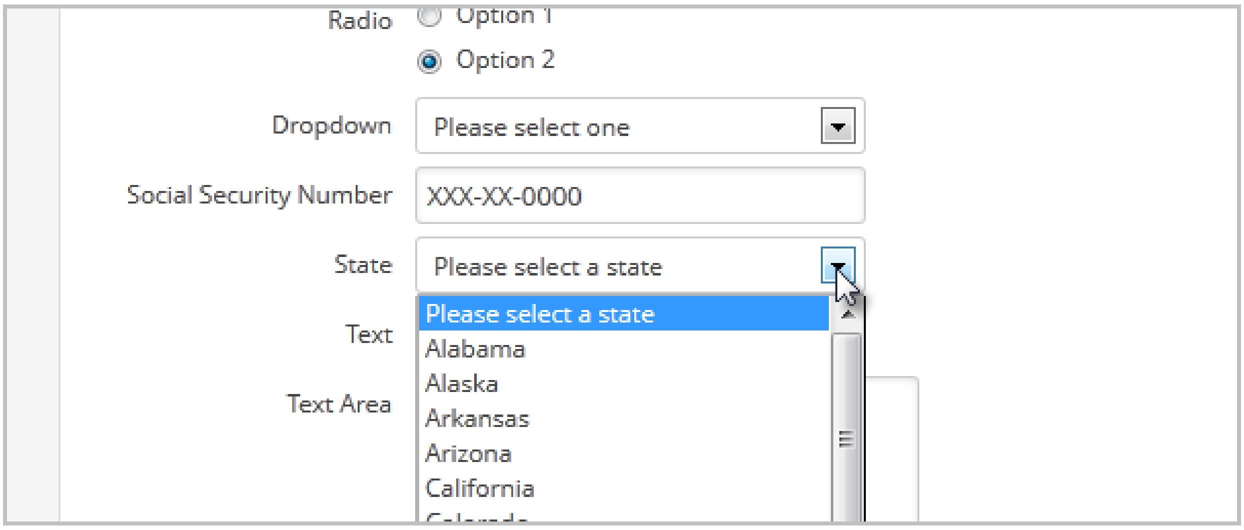
- **Phone Number**: Converts a number to U.S. phone number format - (XXX) XXX-XXXX. Use this field to add more than 5 phone numbers to a contact record.



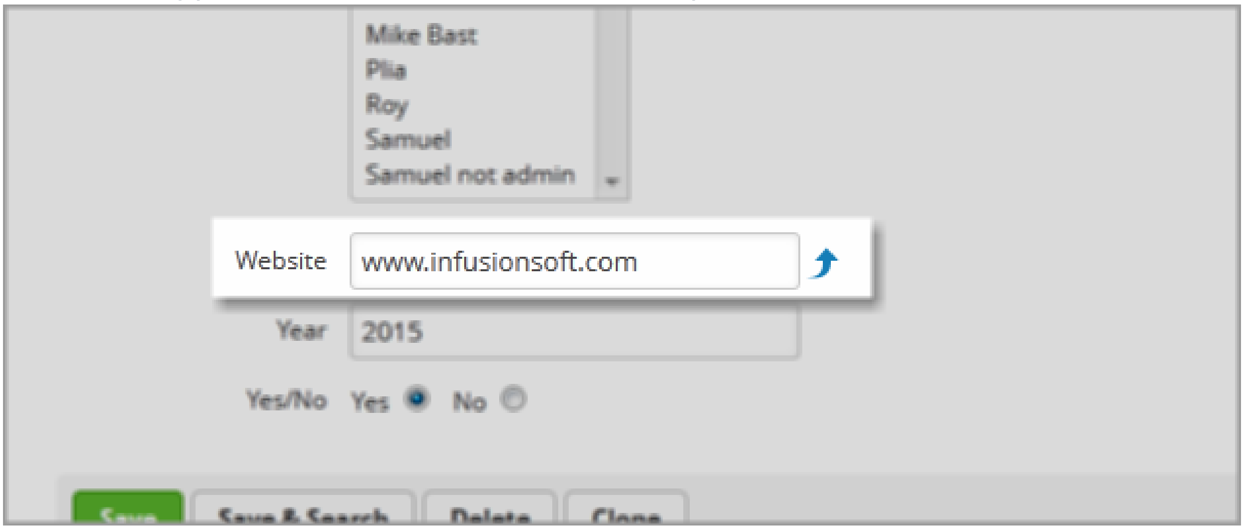
- **Social Security Number**: Converts a number to the U.S. Social Security number format - XXX-XX-XXX. The Social Security number field is encrypted. After the number is added, your users will only be able to view the last 4 digits.



- **State**: Creates a U.S. state drop-down in the contact record.



- **Website**: Converts a website address into a hyperlink for one-click access to the website listed. The hyperlink works with or without *http://*.



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Create Custom Fields

Last Modified on 10/03/2018 2:13 pm MST

If you need to store information that is specific to your business or industry, you'll create custom fields. Custom Fields are located in records. You are able to add up to 100 custom fields per record type.

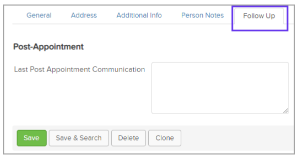
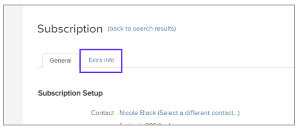
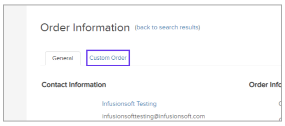
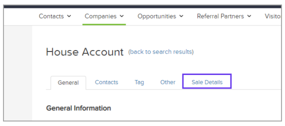
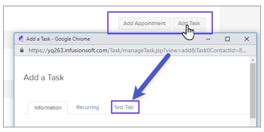
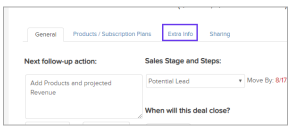
Unfortunately, we are not able to add additional custom fields if you exceed 100. However, you can look into FieldSpace , which can archive old information from Infusionsoft or simply create new fields inside of FieldSpace and store information directly.

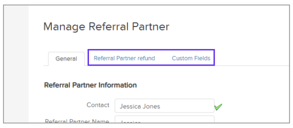
Record Types

Record types are different areas of business within the application. They indicate where the custom fields are located. For example, if you create a custom field for an Order Record, you would go to any Order to see the Custom field tab.

- **Reports**: Fields can be accessed through search criteria and added as a column for the results. For more information regarding Search reports, click here .
- **Merge Fields**: A placeholder used to insert personalized content into a marketing piece such as an email. For example, ~Contact.FirstName~ is a "**Merge Field**" that inserts the value stored in the **First Name field** of the contact record into the email. For more information, click here .
- **Automation**: Automate actions through web forms, landing pages, internal forms, timers, and appointments. For more information, click here . Only Contact records are available for automate actions. The other records are manually added/updated.

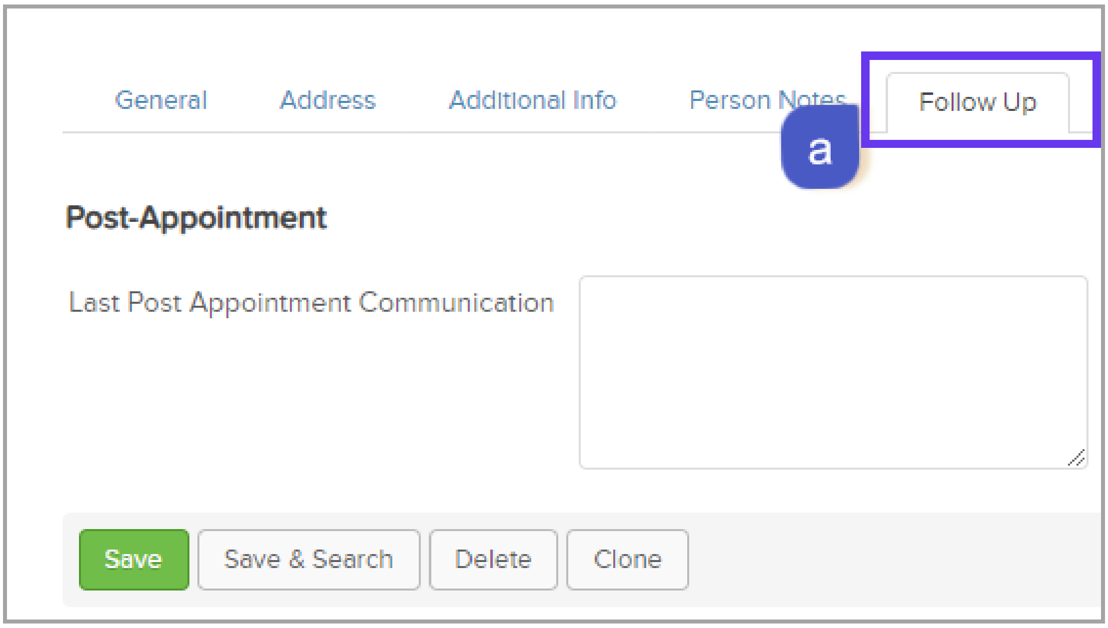
Pro Tip! Click images in the table to view larger.

Record Type	Reports	Merge Fields	Automate Actions
Contact 	X	X	X
Subscription 	X		
Order 	X	Legacy Invoice	
Company 	X		
Task/Appt/Note 	X		
Opportunity 	X		
Referral Partner			

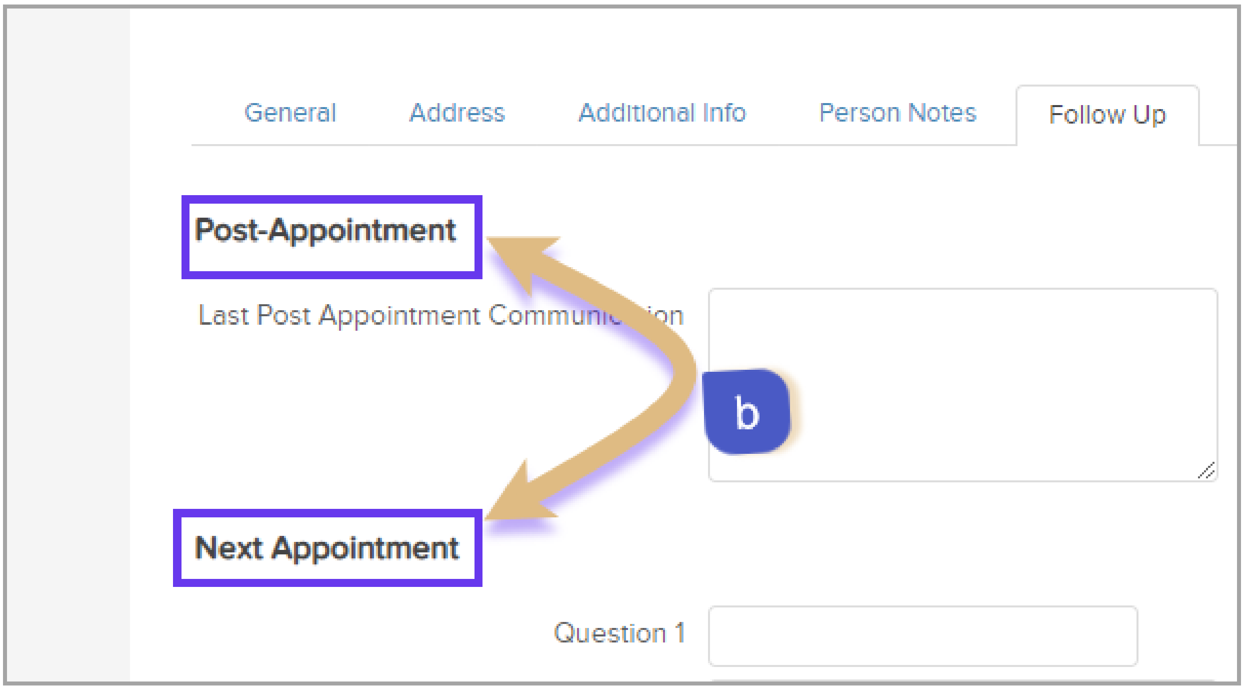
	X		

Custom fields consist of

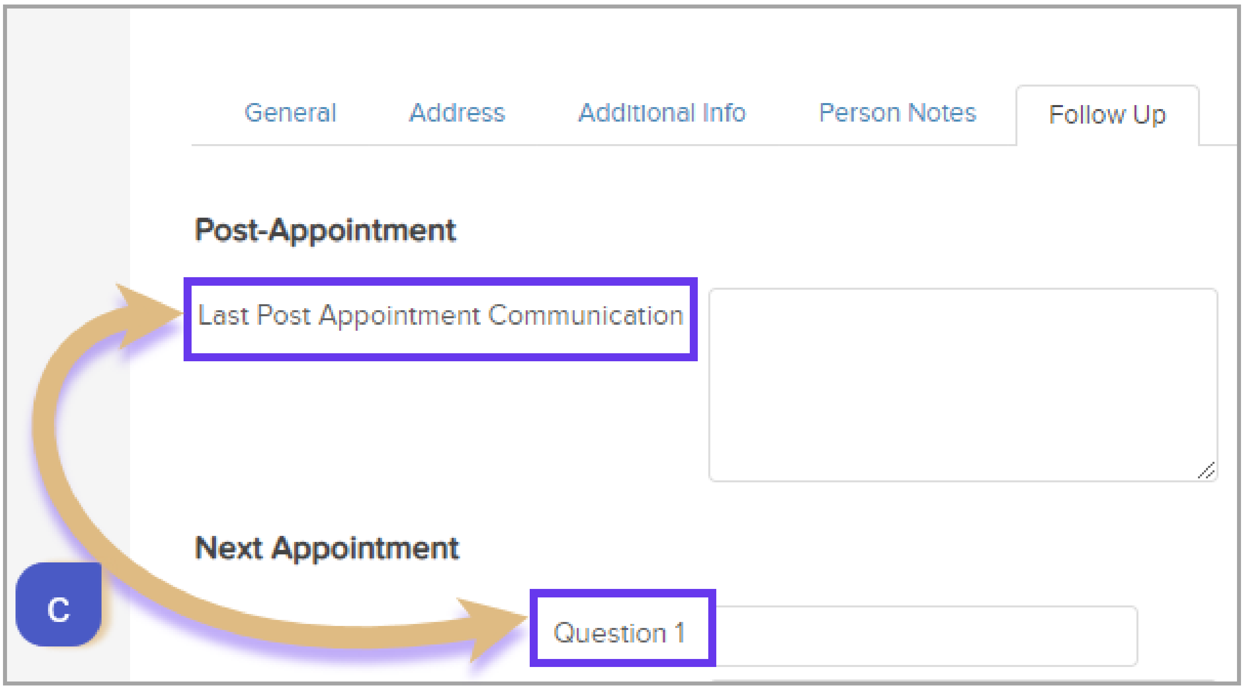
a. **Tab** - Contains a collection of fields that share a common type or purpose.



b. **Headers** - The header groups fields within the tab. There may be multiple headers under one tab.



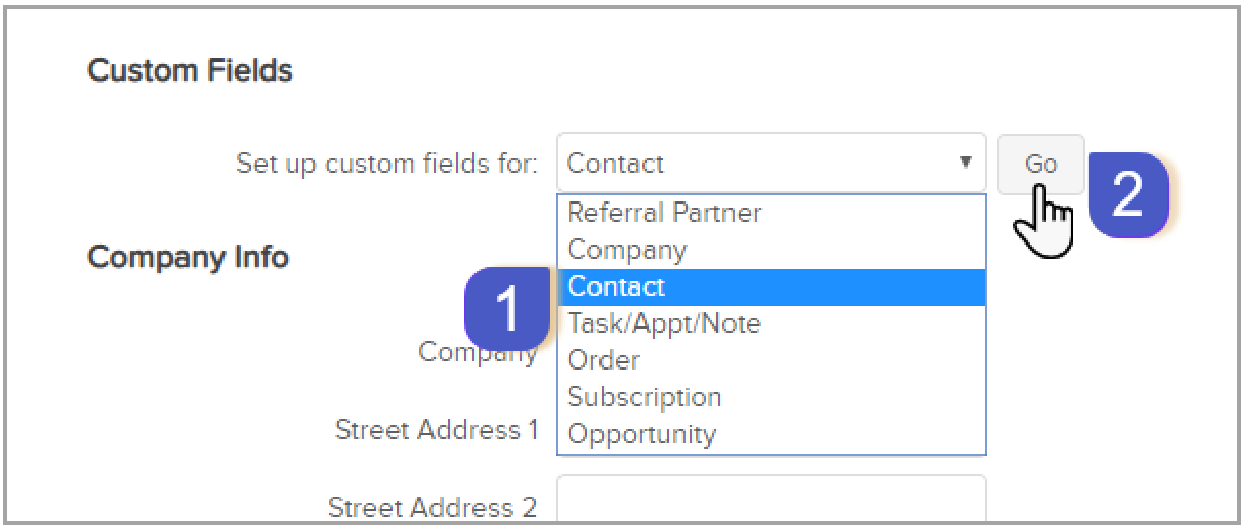
c. **Field** - Holds information about a contact. There may be multiple fields within one header. The "**Field Name**" should be short, descriptive, include at least one alphanumeric character, and be unique.



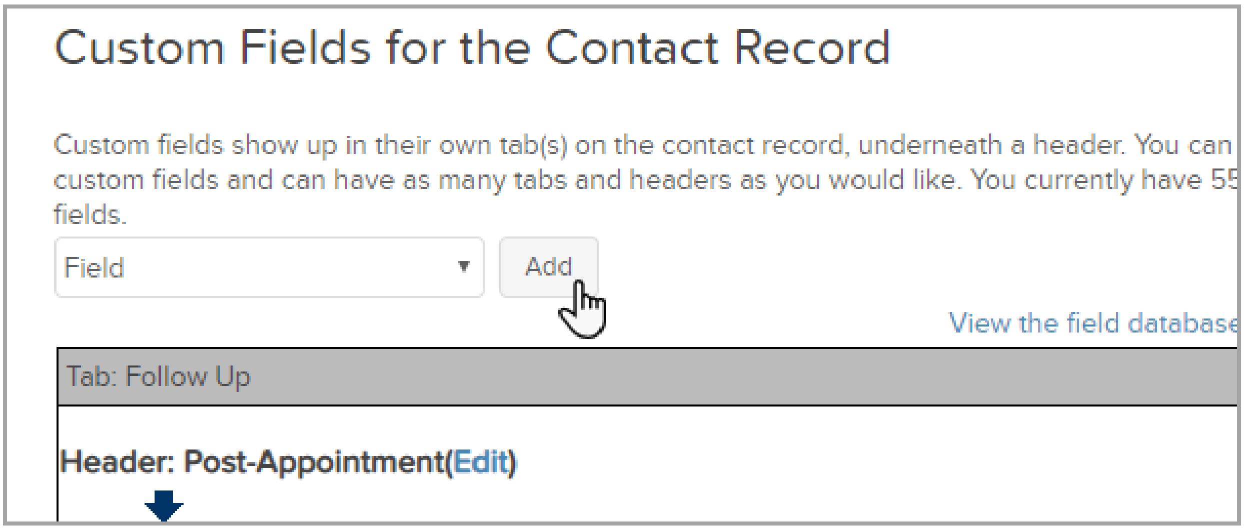
How to create a custom field

1. Go to **Admin** > **Settings**

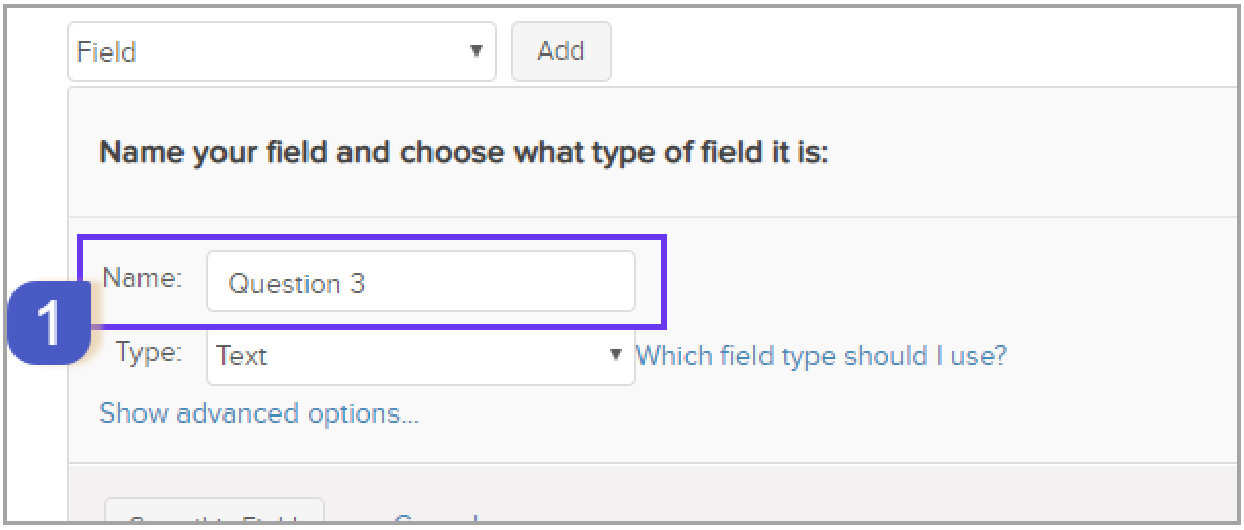
2. Select a record type from the drop-down list and click on **Go.**

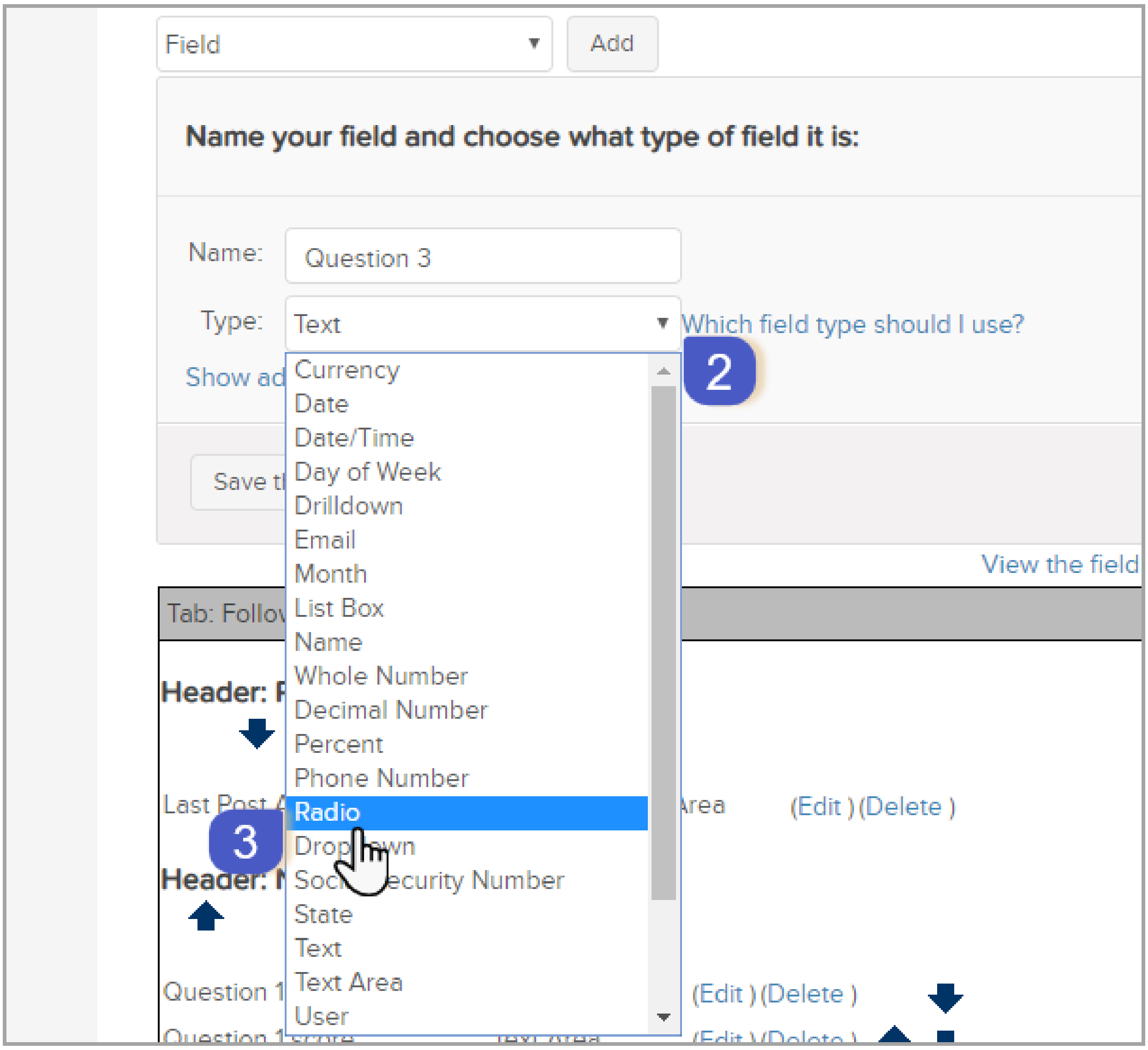


3. Select "**Field**" from the drop-down and click **Add**



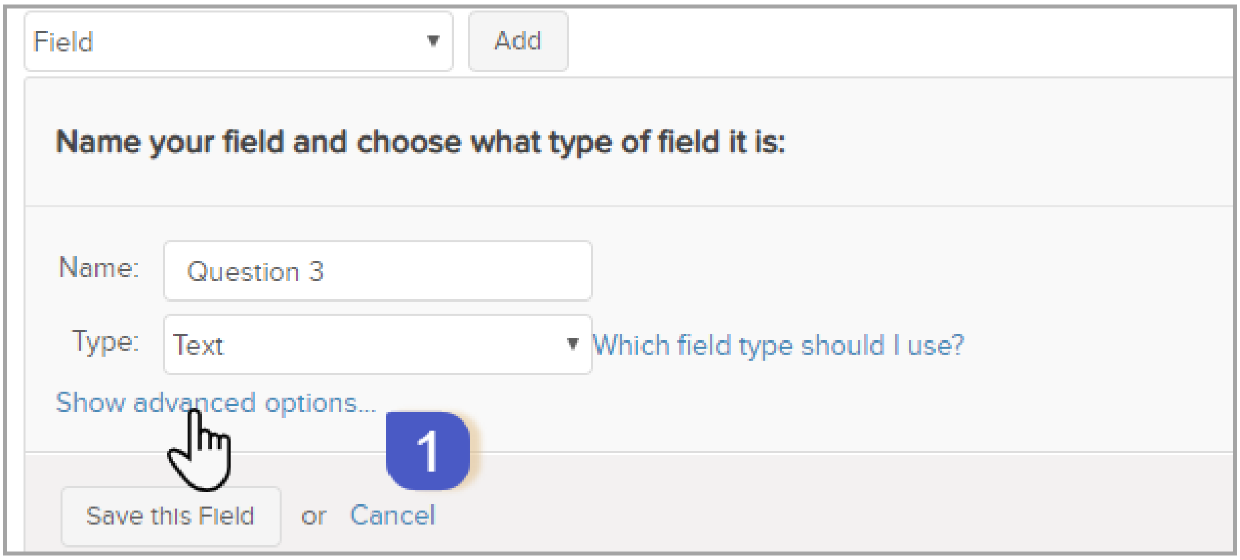
4. Enter the **Field Name** and select the Field Type



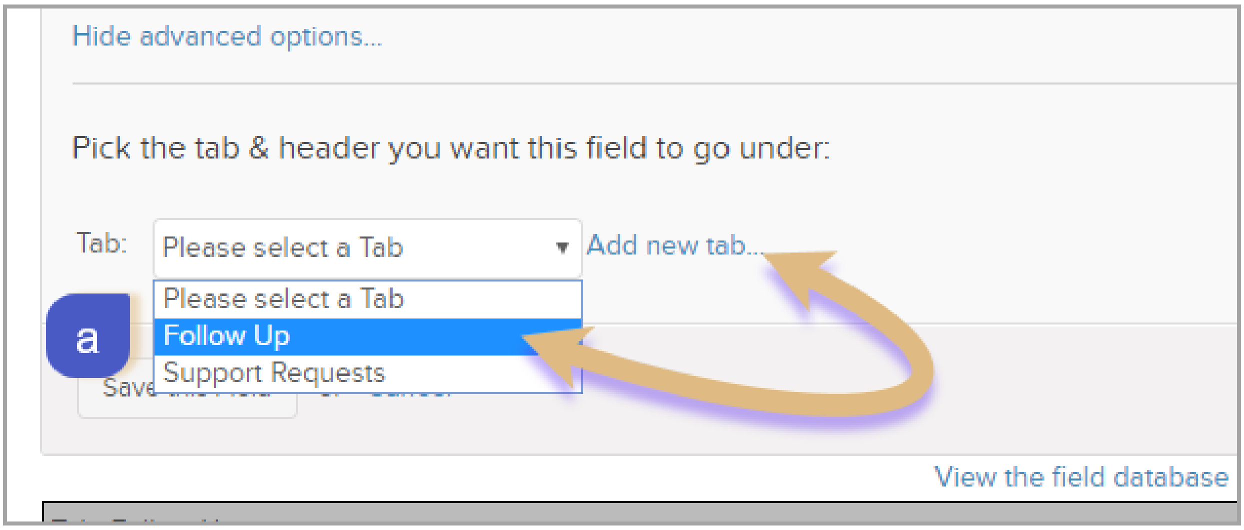


Warning! Once you save a custom field, you will not be able to change its field type. In the case that the wrong field type is used, you will need to either create a new field or delete the incorrect custom field and restart the creation steps. When you **delete** a custom field, all data contained in the field will be removed forever. **This process cannot be undone**!

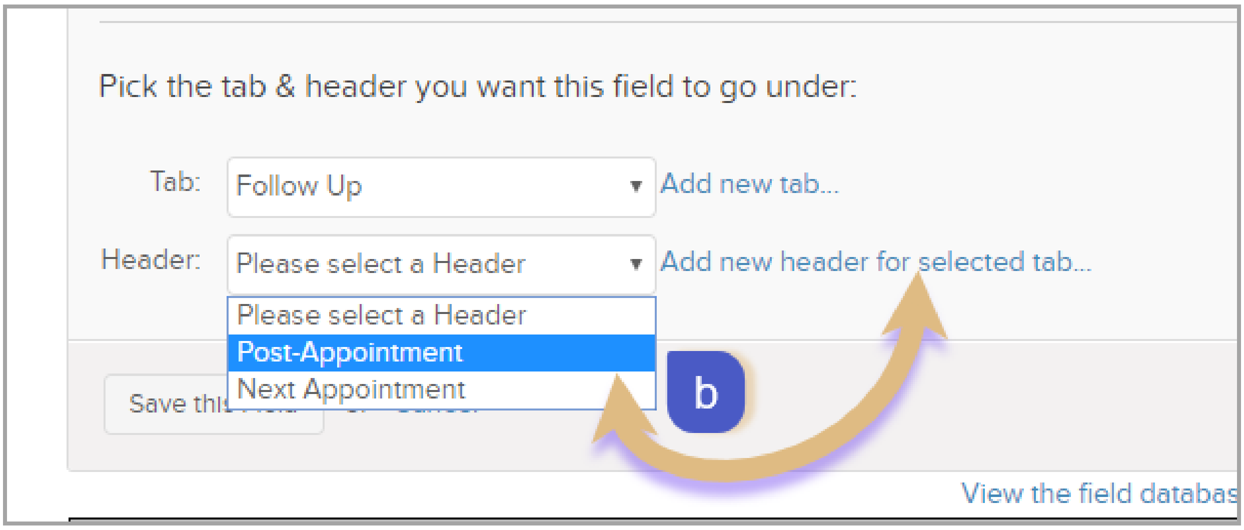
5. Click on the **Show advanced options** to organize this field by tab and header



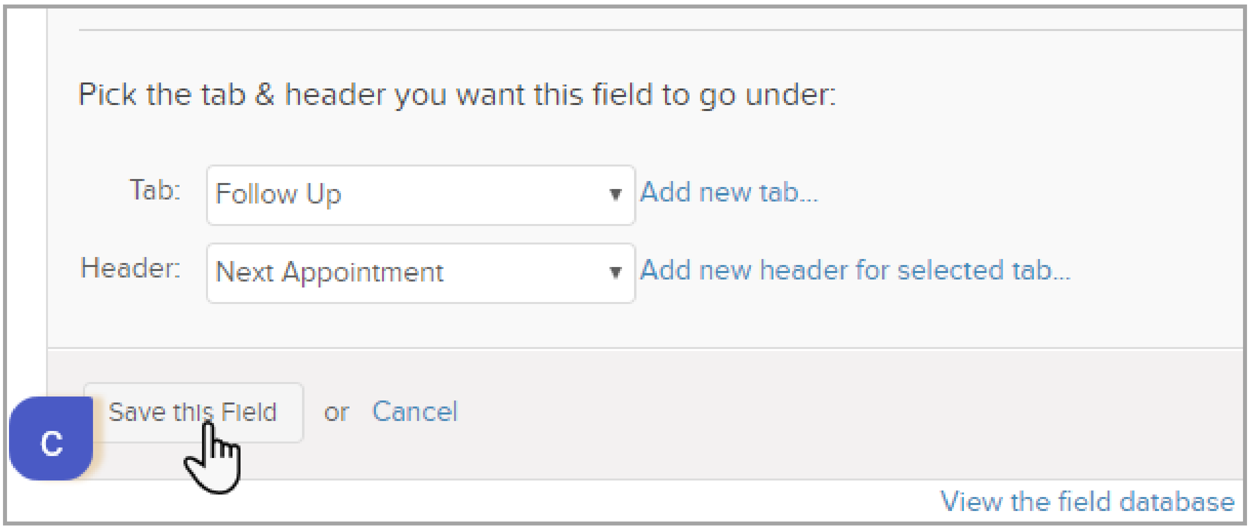
a. **Tab**: Choose a tab from the drop-down list or add a new tab.



b. **Header**: Choose a header from the drop-down list or add a new header.



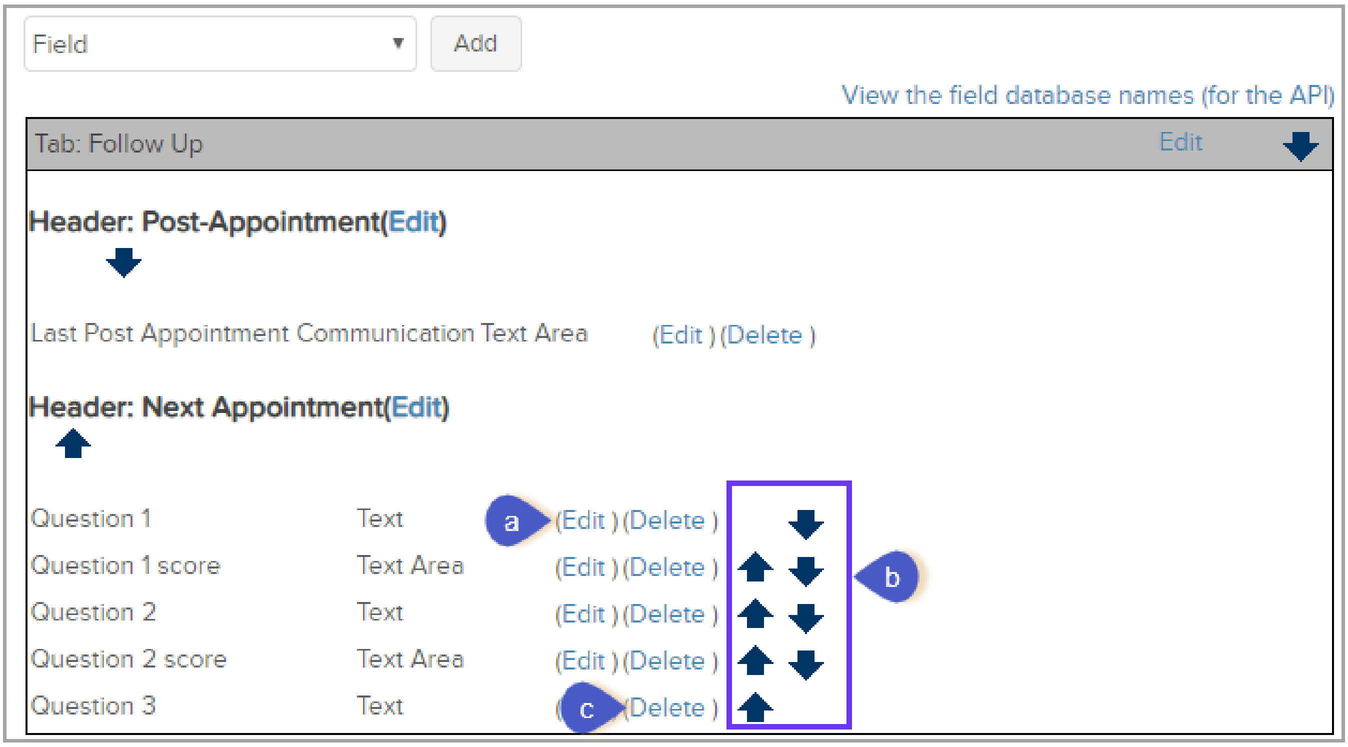
c. Click on **Save this Field**



Custom Field Summary - edit, arrange, and delete

The new tab, header, and field are now displayed in the custom field summary

- Click on **Edit** to change the tab, header or field names.
- Click on the **arrows** to change the order of headers and fields.
- Click on **Delete** to completely remove the field from the database.



Warning! When you delete a custom field, all data contained in the field will be removed forever. This process cannot be undone!

Any links we provide from non-Infusionsoft sites or information about non-Infusionsoft products or services are provided as a courtesy and should not be construed as an endorsement by Infusionsoft.

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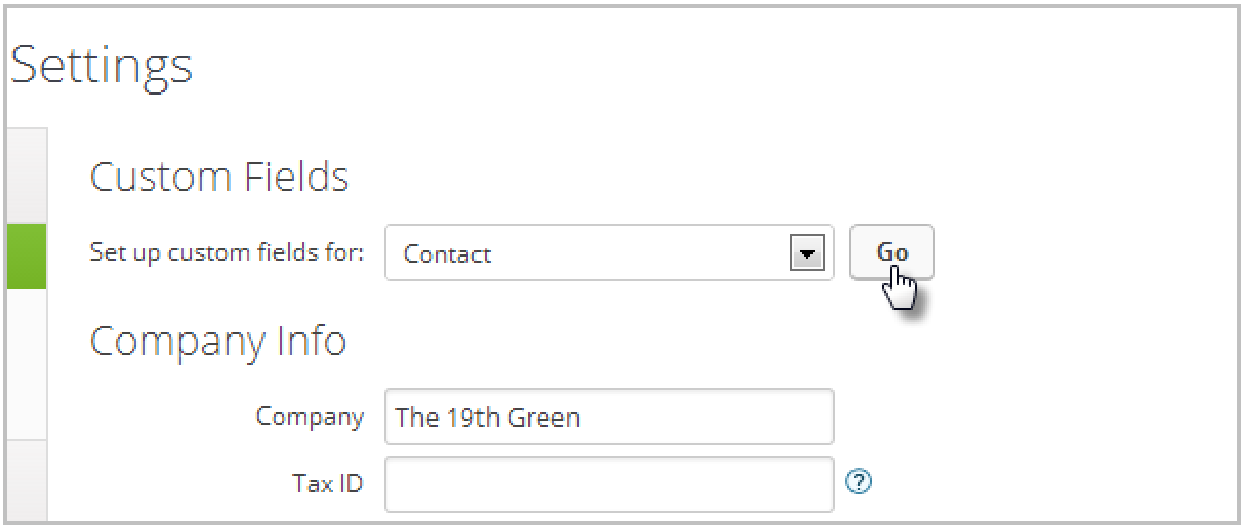
Backend Database Names For Custom Fields

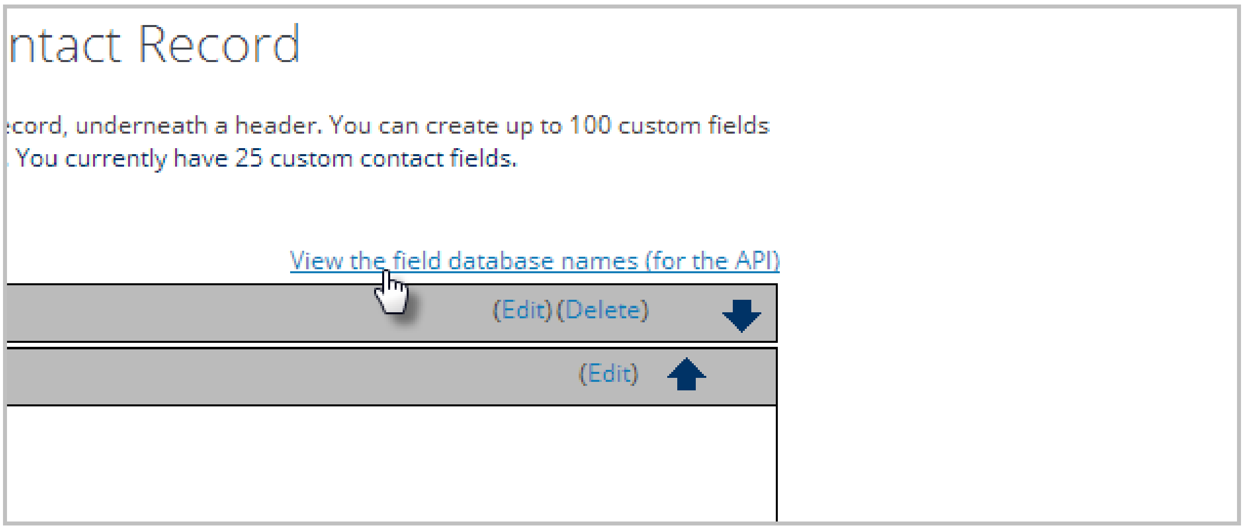
Last Modified on 08/02/2018 2:04 pm MST

1. Go to Admin > Settings in the main navigation menu

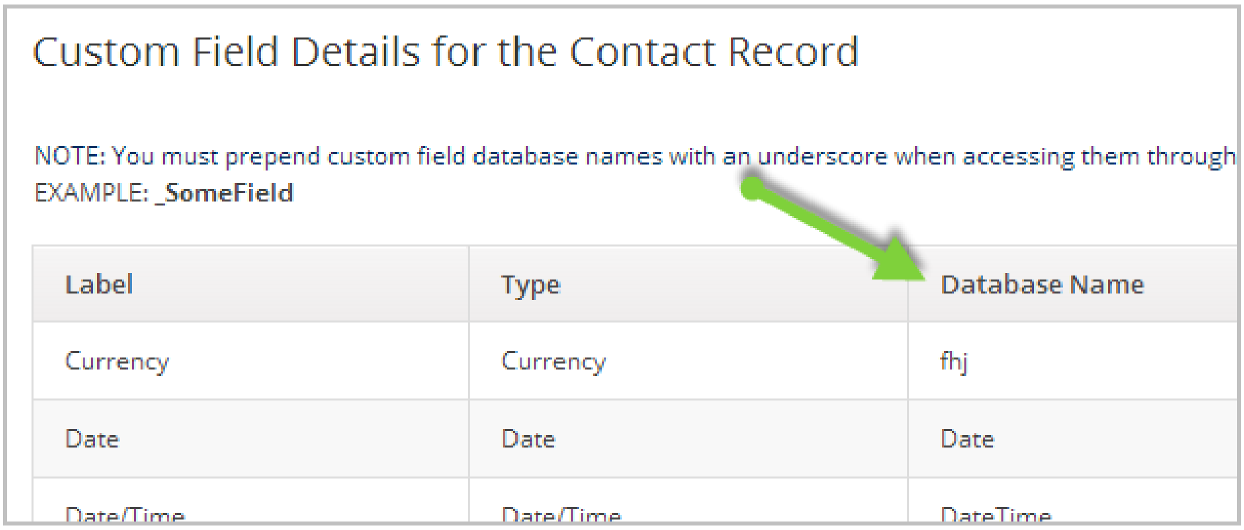
2. Go to the custom field section, select a field type from the drop-down, and then click on **Go**.



3. Click on the **View the field database names (for the API)** link.



4. The database field names will be listed in a new window.


Custom Field Details for the Contact Record
NOTE: You must prepend custom field database names with an underscore when accessing them through
EXAMPLE: _SomeField
Label
Type
Database Name
Currency
Currency
fhj
Date
Date
Date
Date/Time
Date/Time
DateTime

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Modify Existing Records

Last Modified on 08/02/2018 2:05 pm MST

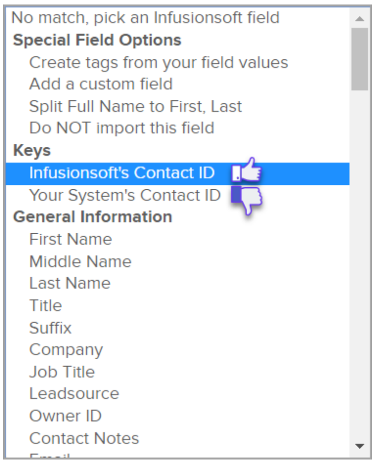
You can use the Infusionsoft Import tool to mass update a specific list of contacts. For example, you may need to add different country information to all of your existing contacts.

You can export a list, add each person's country information to it, and then import it back into Infusionsoft to update your existing contact list. **The Infusionsoft Contact ID must be included in the export and the updated import file.**

WARNING! The new information will permanently overwrite existing information in the updated field(s). The only exception is the Contact Notes field; this field can only be appended to. Updates performed through the Import tool cannot be reversed. Make sure you preview the field matching before you complete the import.

Important things to know

- You can NOT use a Modify Existing Records to delete information. Empty fields will be skipped
- **Never match fields to the "Your Systems Contact ID"**



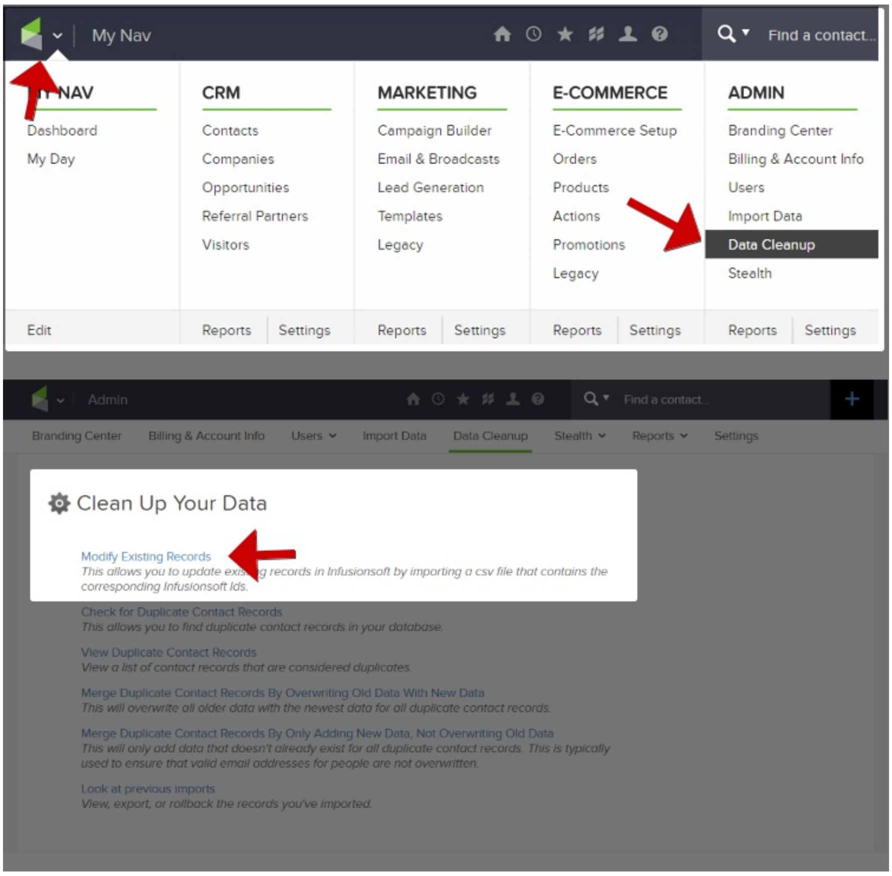
Instructions

1. Go to **Admin** > **Data Cleanup** in the main navigation menu.

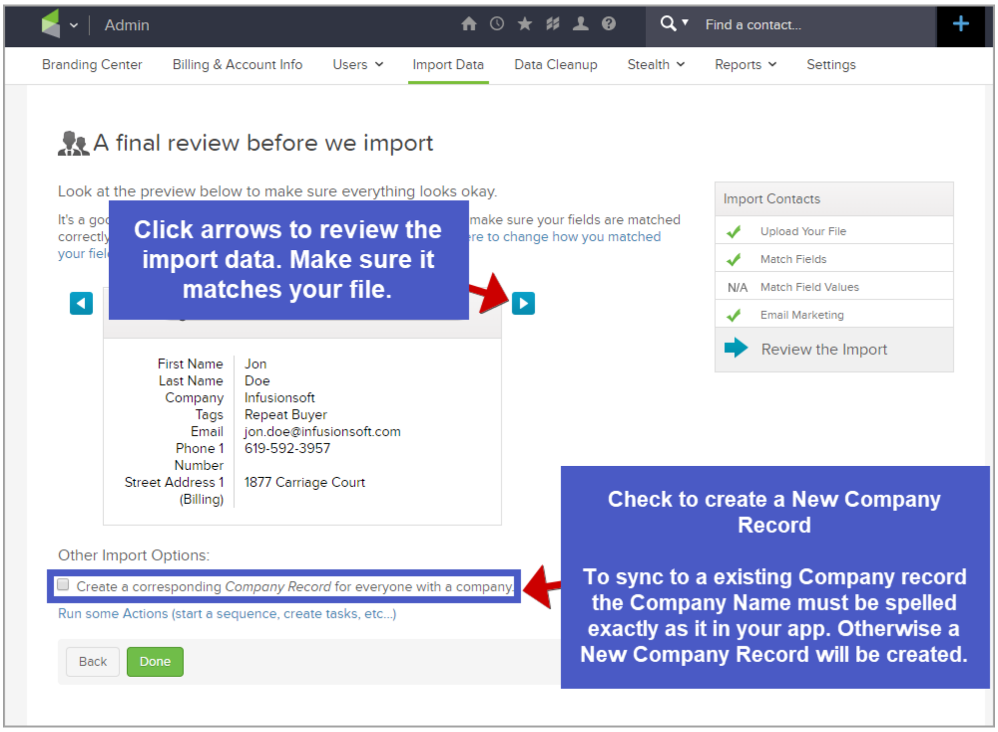
2. Click on **Modify Existing Records.** Select the data type and click on **Go**.

3. Click on **Browse** to find the revised CSV file on your computer, and then click **Next**.

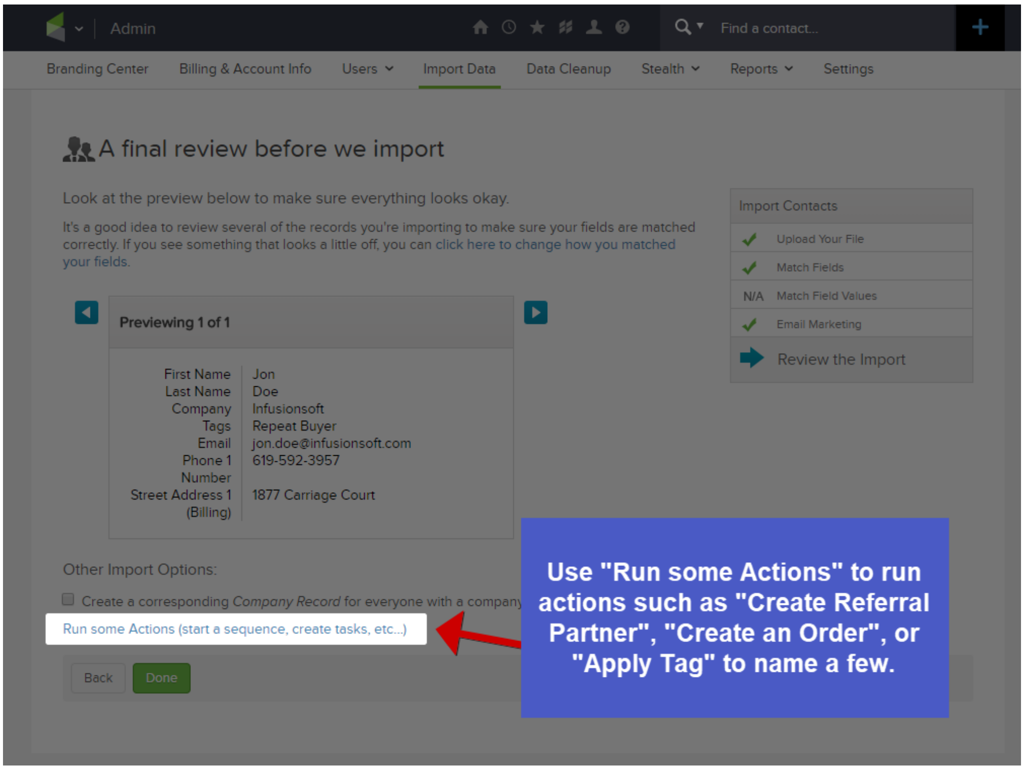
4. Match the Fields. The ID Field must match with the Infusionsoft ID Field.



- **Infusionsoft Contact ID**: Make sure NOT to match the Infusionsoft Contact ID to the System Contact ID. This will not update any records but will only skip the import.
- **Tags**: Use **Create tags from your fields values** even if the tag already exists in your app.
- **Create a Corresponding Company Record**: You can mark the checkbox to create company records for every contact that has a company name in the company field. Please note that any spelling variation in a company name will create multiple companies records. For example, Infusionsoft and Infusionsoft Software would create two separate companies



- Run some Actions: Apply/Create multiple tags and other Actions Sets



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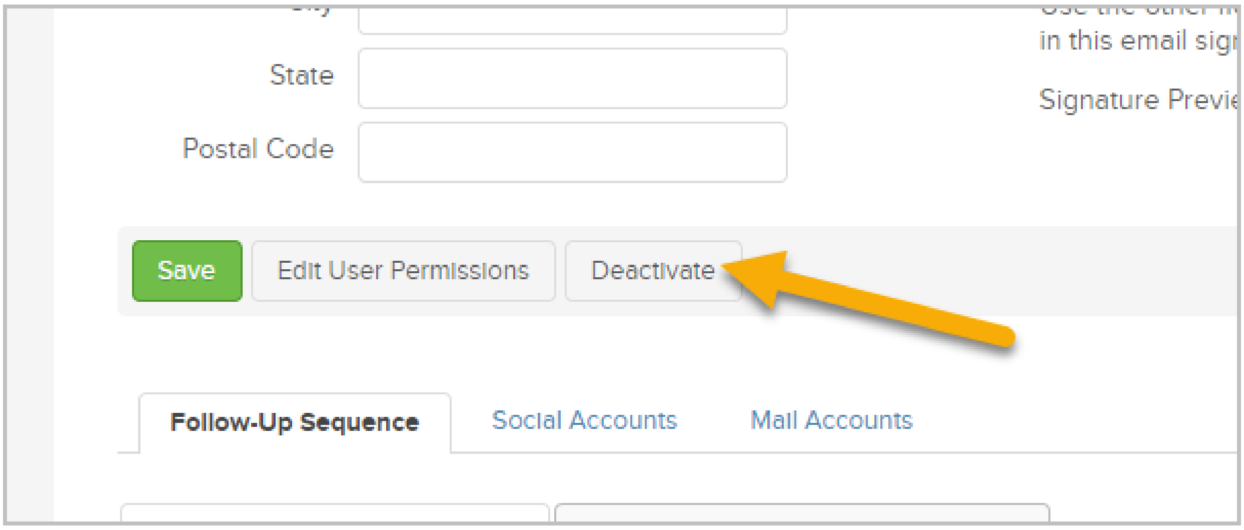
Add or Delete a User

Last Modified on 08/21/2018 12:52 pm MST

Delete a User

You don't "delete" a user from Infusionsoft, you deactivate their account. Note that you must be an Admin in order to deactivate a user. To do this, go to **Admin** > **Users** > Click on the name of the user, scroll down the the bottom of the user record and click the **Deactivate** button. Click here for more information.

Note: Once the ownership from the Deactivated User is reassigned it cannot be undone. You can manually reassign if done in error. Click here for more information.



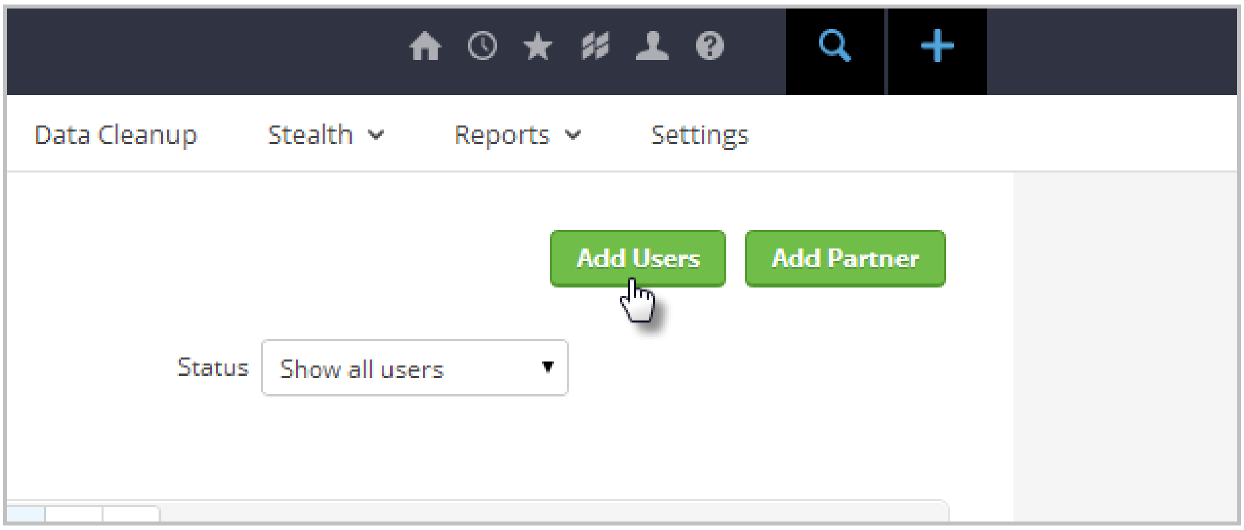
Add a New User

When you invite a new user, they will receive an email with a link to set up their Infusionsoft profile.

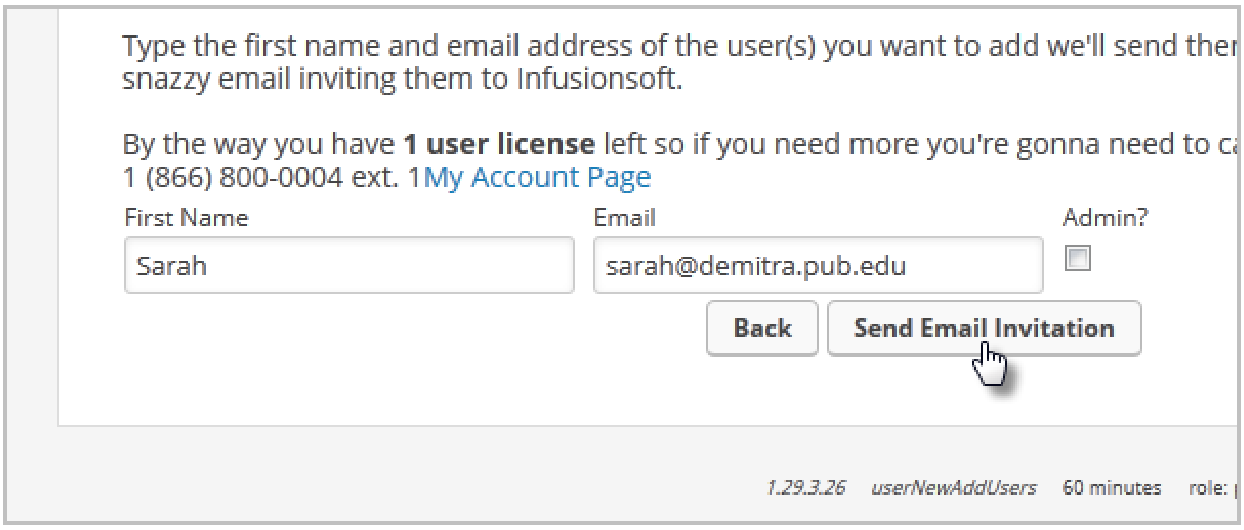
Each edition of Infusionsoft comes with a limited number of users. When you reach the limit, you will need to purchase additional user licenses through the My Account area. Before purchasing more user licenses, you might want to review and update your existing users. The limit is based on the number of active users. You can deactivate users who no longer need access to your system to free up space.

1. Go to **Admin** > **Users** in the main navigation menu

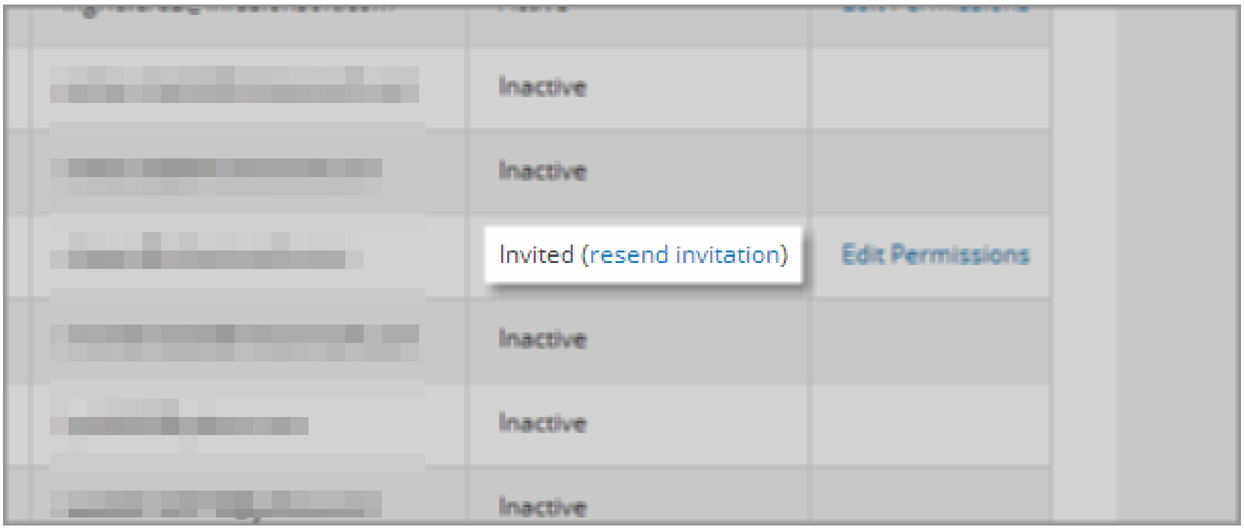
2. Click on **Add Users**



3. Enter the First Name and Email and click the **Send Email Invitation** button.



4. The person will receive an invitation to create their profile. If they do not see the email in their inbox, their email system may have put it into their junk mail box, or the email address you used may not be correct. If you need to resend the invitation, just click the **Resend Invitation** link.


Inactive
Inactive
Invited (resend invitation)
Edit Permissions
Inactive
Inactive
Inactive

Using a different version of Infusionsoft? Click Here to learn more

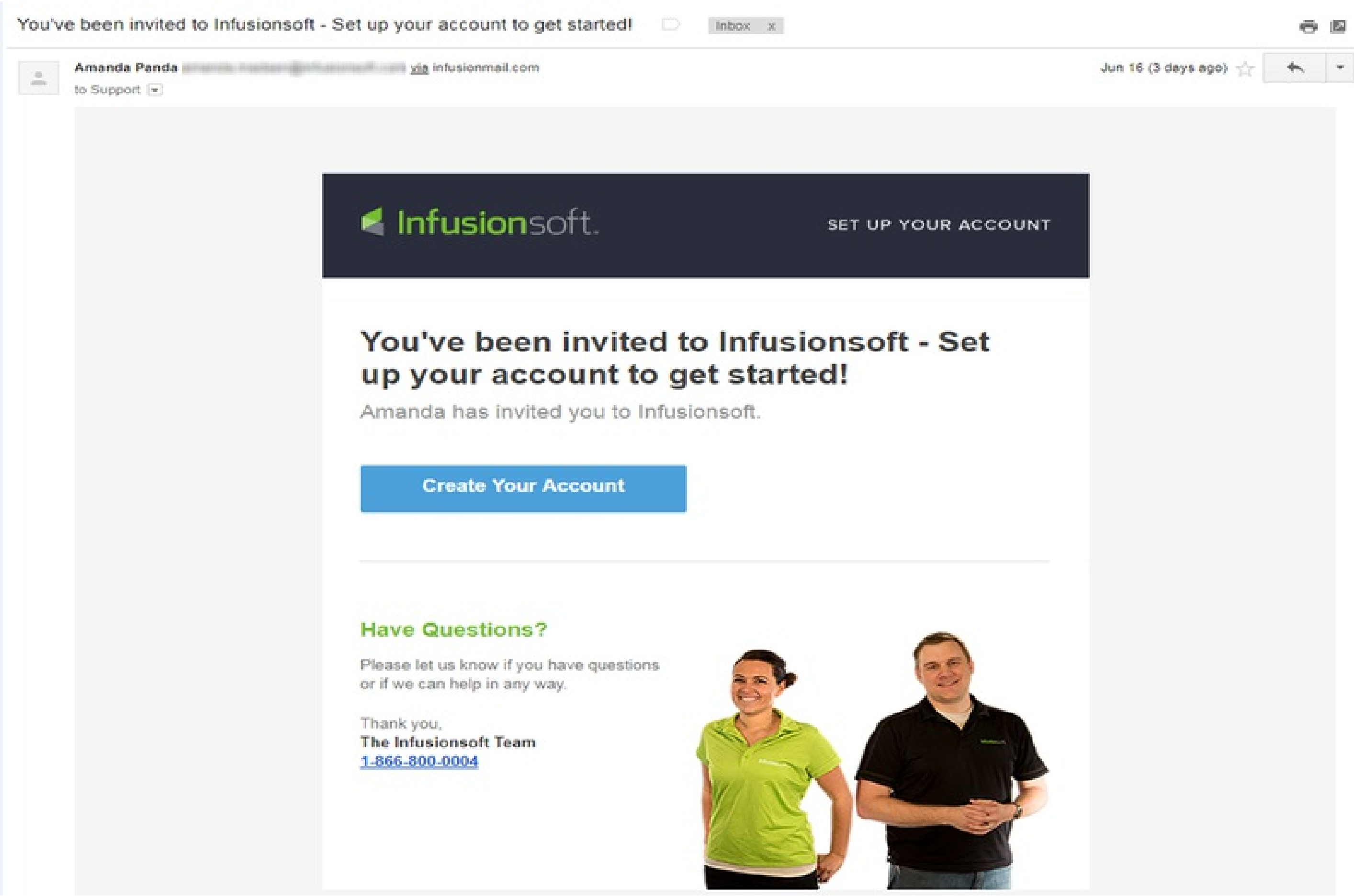
New User Invite Process

Last Modified on 08/02/2018 2:06 pm MST

This is the experience your users will have when being invited to your Infusionsoft account. If you need to learn how to invite a new user, check out this article . This includes brand new users and those users that already have an Infusionsoft ID on another Infusionsoft account.

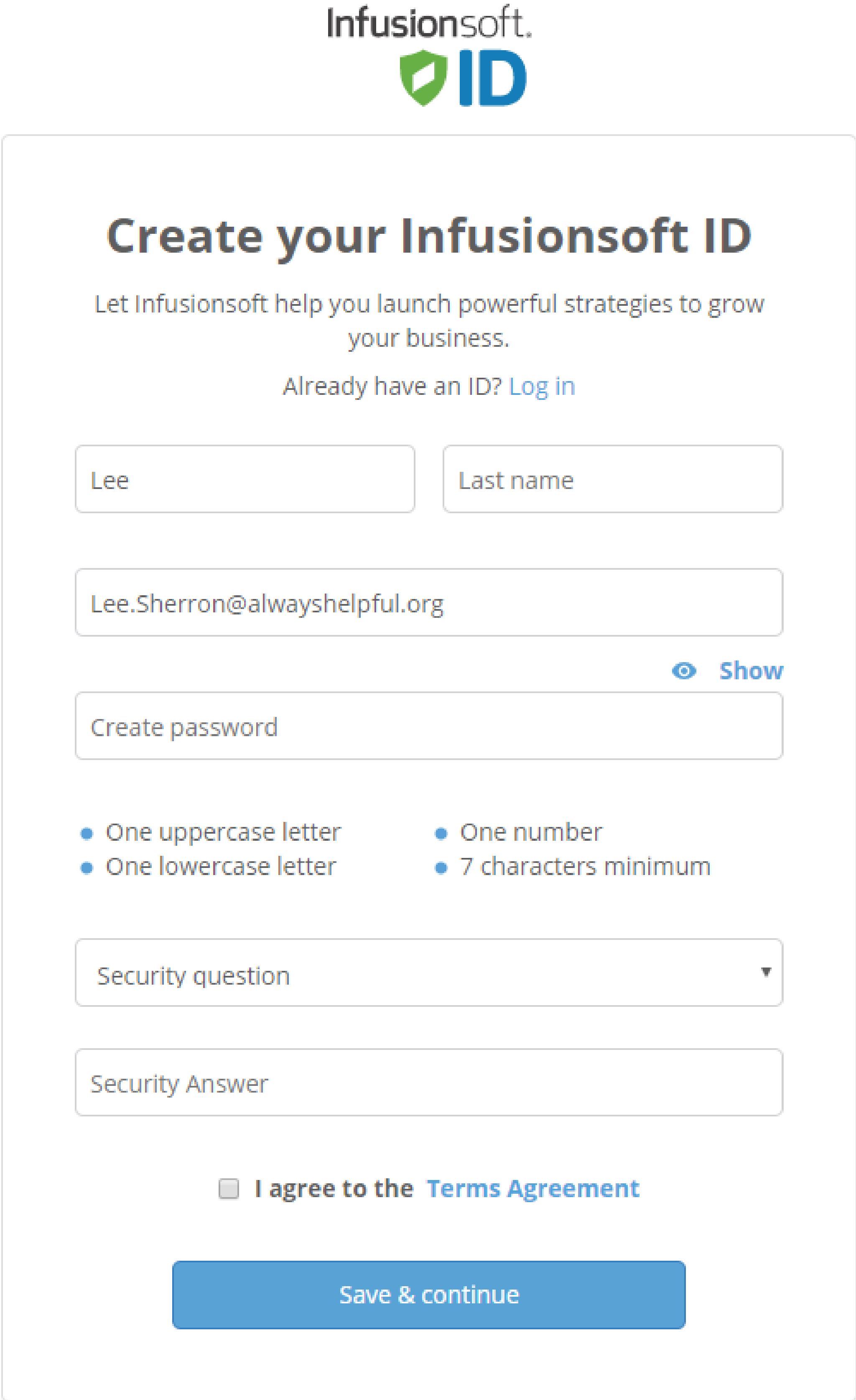
Invite Email

Be sure that they check their junk/spam folder if they don't see it in their inbox



Create Your Infusionsoft ID

If this is your first time creating a Infusionsoft ID continue to complete the form.


Infusionsoft.
ID

Create your Infusionsoft ID

Let Infusionsoft help you launch powerful strategies to grow your business.

Already have an ID? Log in

Lee | Last name

Lee.Sherron@alwayshelpful.org

Show

Create password

- One uppercase letter
- One lowercase letter
- One number
- 7 characters minimum

Security question

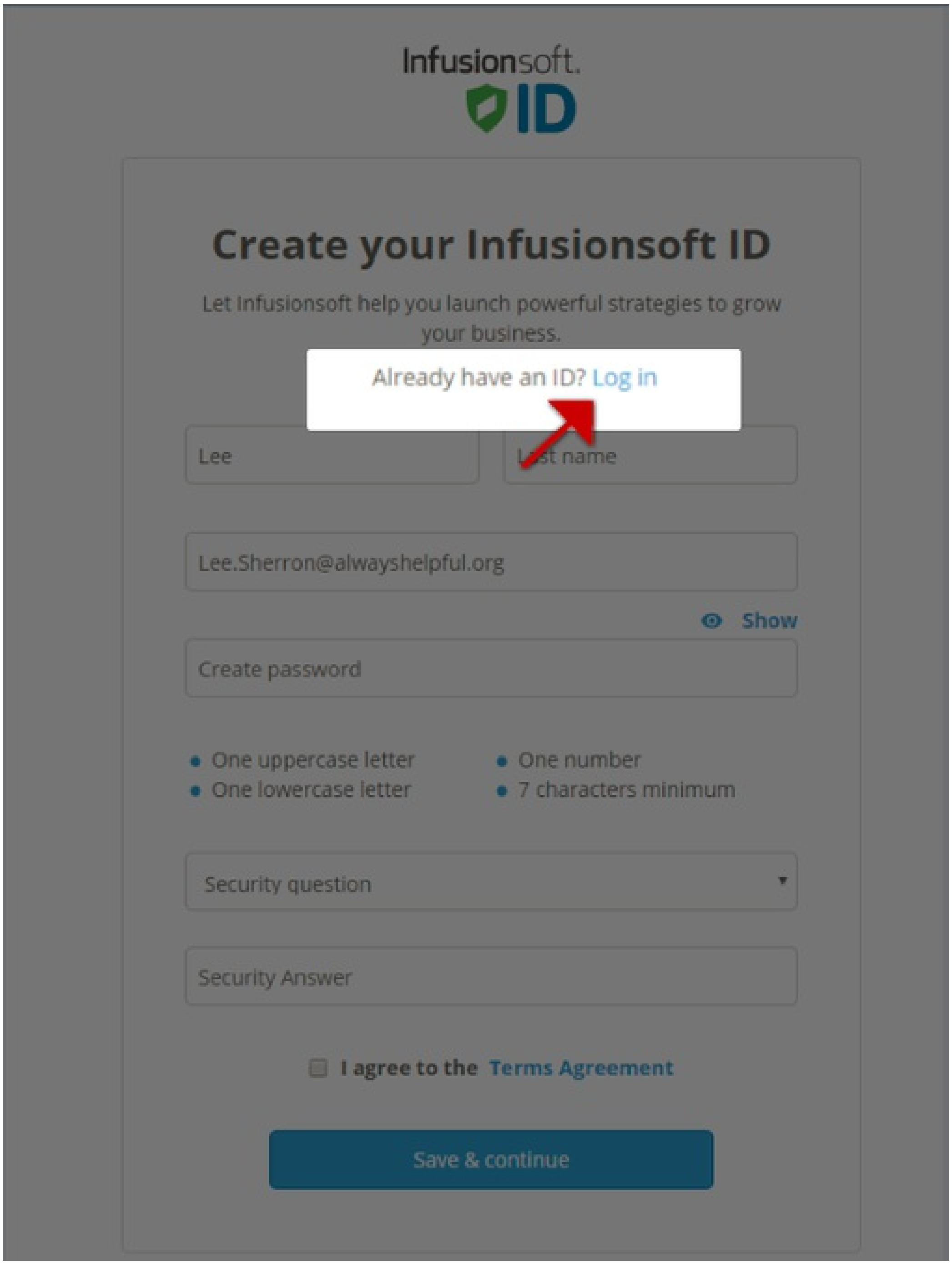
Security Answer

I agree to the **Terms Agreement**

Save & continue

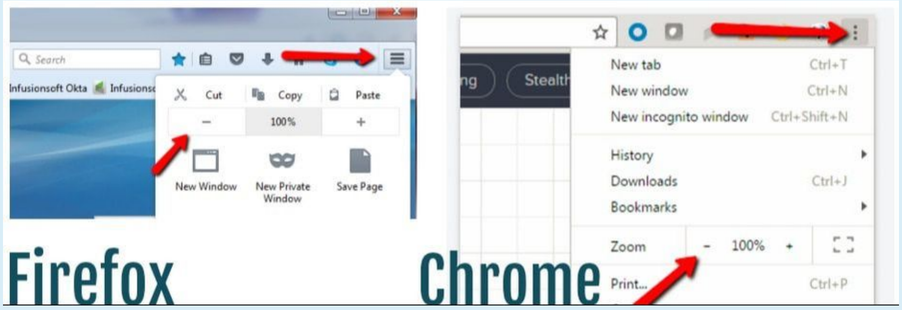
Sign in With an Existing ID

If you already have an Infusionsoft ID click the "Log in" next to the "Already have an ID?" and then login with your existing password.

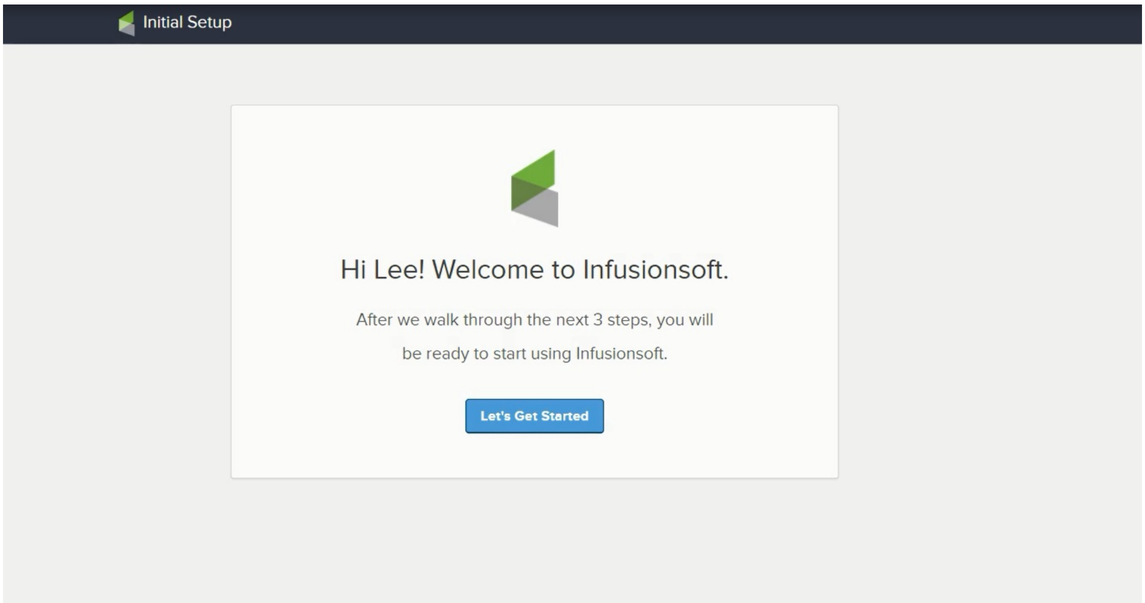


Pro-Tip: If you are not able to see the **Save & Continue** button after you click the **Terms**

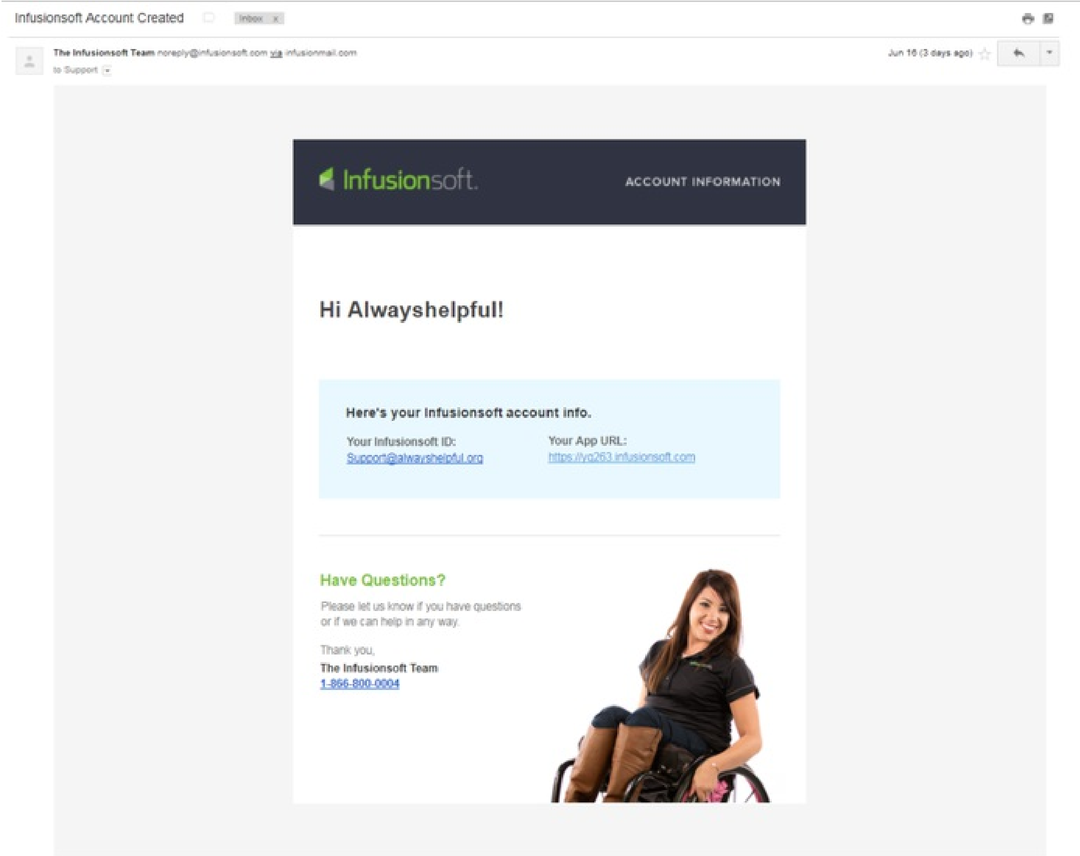
Agreement and **Accept** scroll down or decrease your browser zoom. Even if your page looks normal decreasing your browser zoom will allow you to locate the **Save & Continue** button.



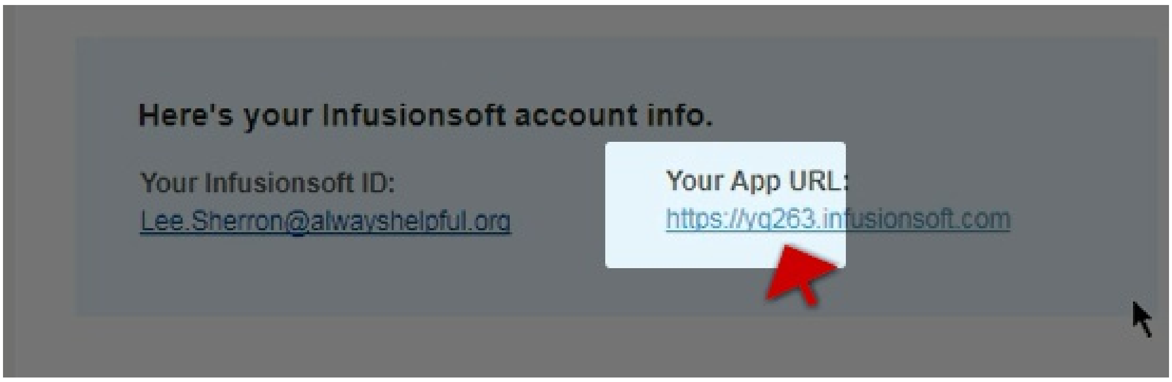
Once you click **Save & Continue** you will be logged into your New Account and prompted to create your User Profile. This includes creating an Email Signature, add a Logo, and more.



Don't forget to check your email for your Account Information. Your Infusionsoft application is referred to as an **App** not to be confused with a mobile app.



In the URL, you have your APP ID which is just like an Account Number. Support will ask for this number to locate your Account. It's also used when connecting plugins.



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How to Deactivate User

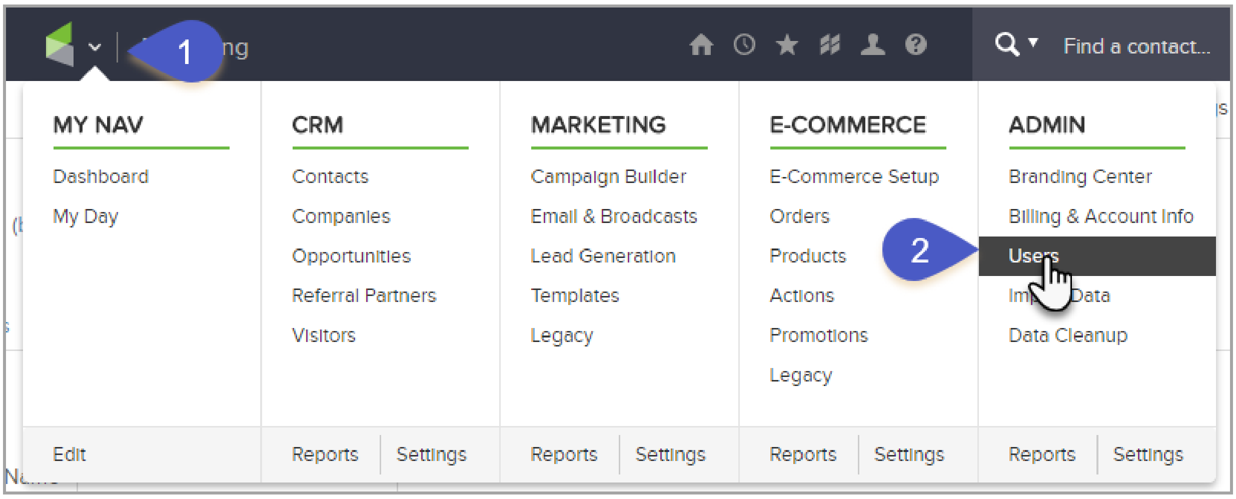
Last Modified on 08/21/2018 12:24 pm MST

You aren't able to completely delete a User but here are the steps to deactivate them. Deactivating a User will remove their access.

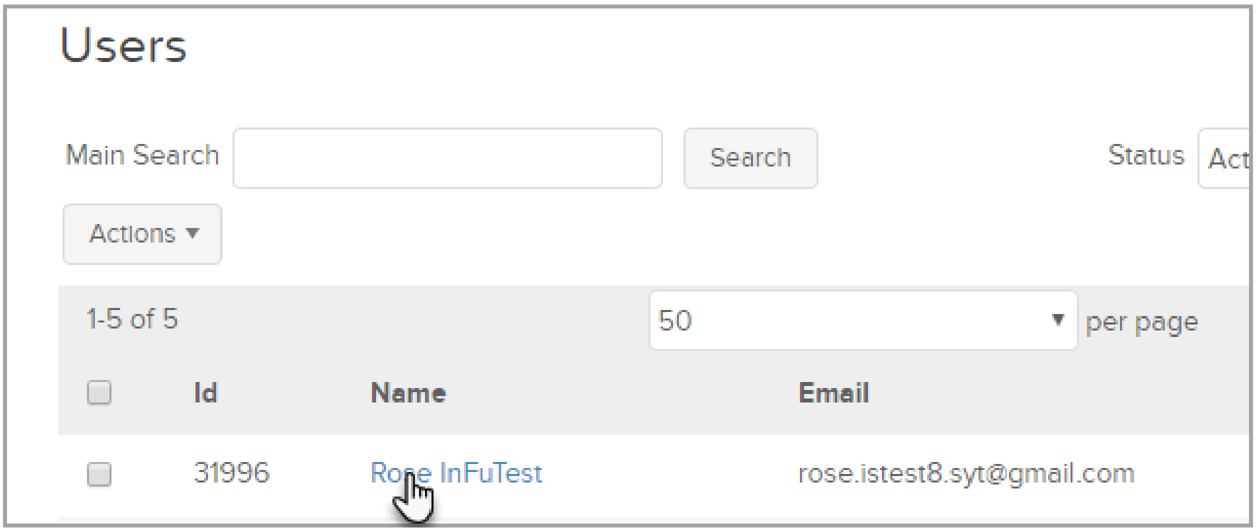
Pro Tip! Reach out to Support and they can Unlink the Deactivated Users Infusionsoft ID and therefore you can replace with a new User when needed.

Deactivate Steps

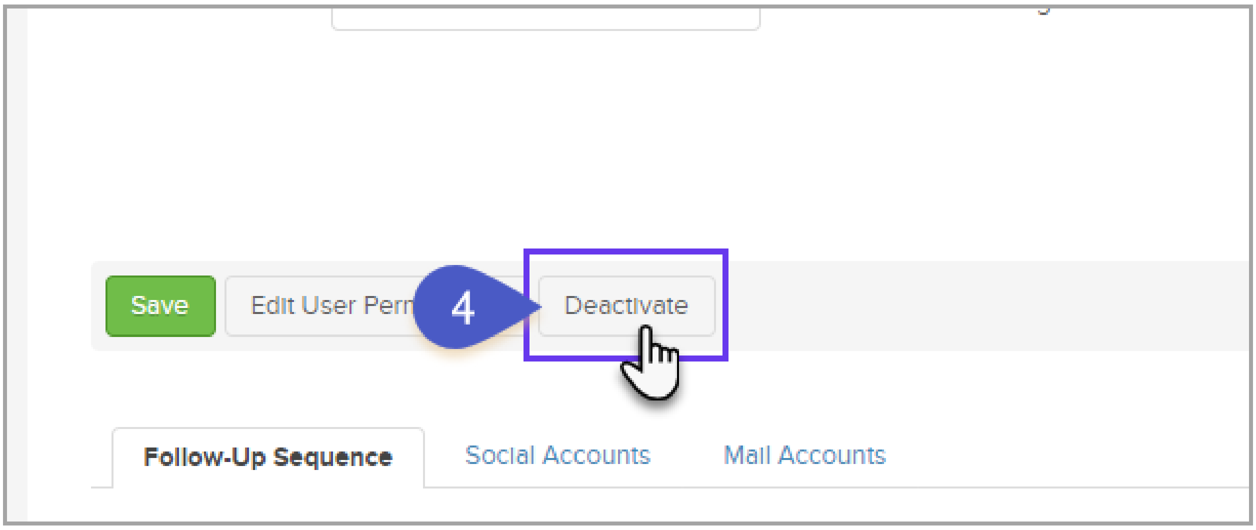
1. Go to Admin > Users



2. Click Users Name in Blue > Scroll Down

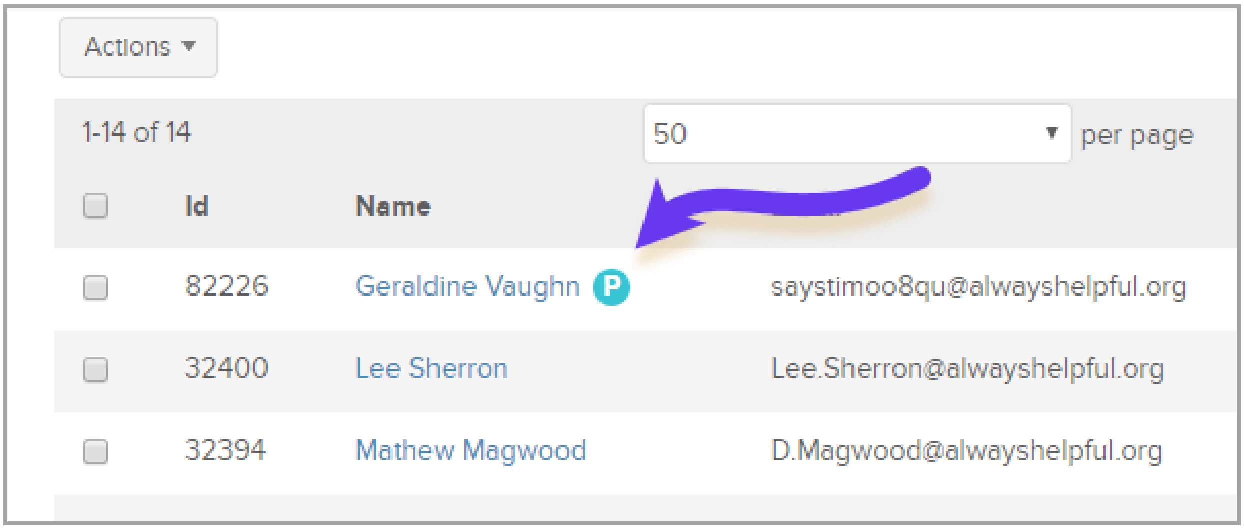


3. Click "Deactivate"



User License

Deactivating a User will make a User license available. The only exception is when a Partner (Users with a blue P next to their name) is Deactivated, since a Partner doesn't use any User license when they are Deactivated no User license will become available.



Reassign Ownership

What happens to the contacts, tasks, opportunities, and notes assigned to a Deactivated user?

When a User is deactivated the completed task will be removed. It will only ask who to assign the **PENDING** Tasks. However, notes will **not** be affected when a User is deactivated.

What happens if I reassign to the wrong User?

Make sure you are assigning to the correct User because once the action is processed there isn't a way to Undo. However, you can manually reassign to another User.

Video Walk through

Note: Video has no sound

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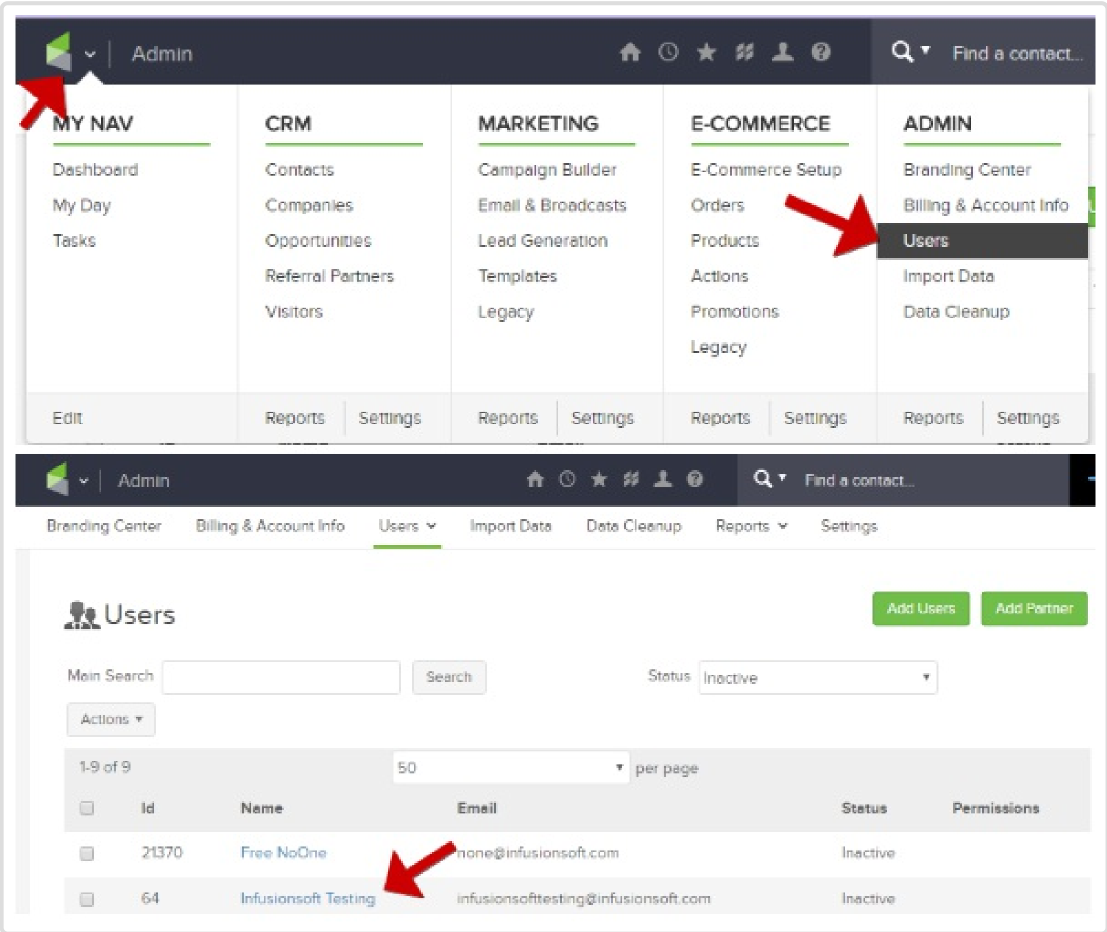
How to Reactivate a User

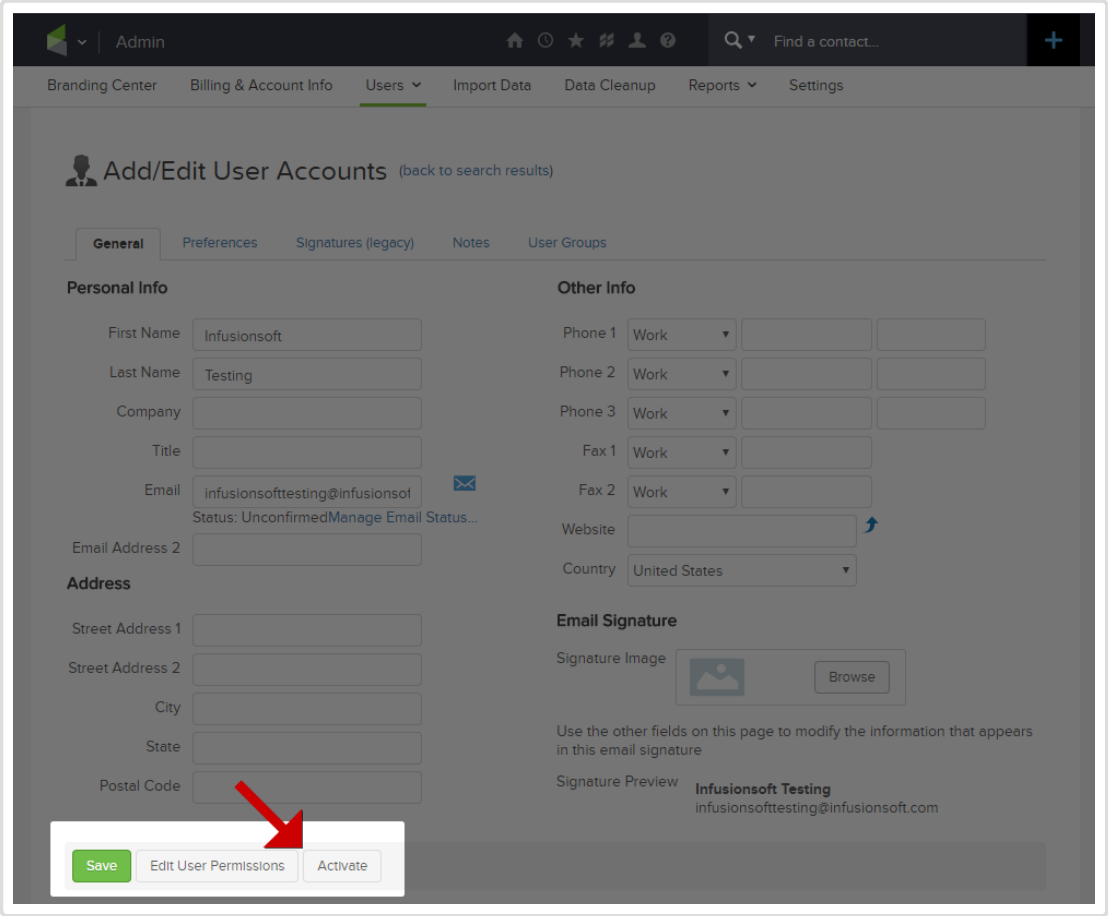
Last Modified on 08/02/2018 2:07 pm MST

1. Go to **Admin** > **Users**

2. Click Users Name in Blue

3. Scroll Down > Click **Activate**




Admin
Find a contact...
Branding Center
Billing & Account Info
Users
Import Data
Data Cleanup
Reports
Settings
Add/Edit User Accounts
(back to search results)
General
Preferences
Signatures (legacy)
Notes
User Groups
Personal Info
First Name
Infusionsoft
Last Name
Testing
Company
Title
Email
infusionsofttesting@infusionsot
Status: UnconfirmedManage Email Status...
Email Address 2
Address
Street Address 1
Street Address 2
City
State
Postal Code
Other Info
Phone 1
Work
Phone 2
Work
Phone 3
Work
Fax 1
Work
Fax 2
Work
Website
Country
United States
Email Signature
Signature Image
Browse
Use the other fields on this page to modify the information that appears in this email signature
Signature Preview
Infusionsoft Testing
infusionsofttesting@infusionsoft.com
Save
Edit User Permissions
Activate

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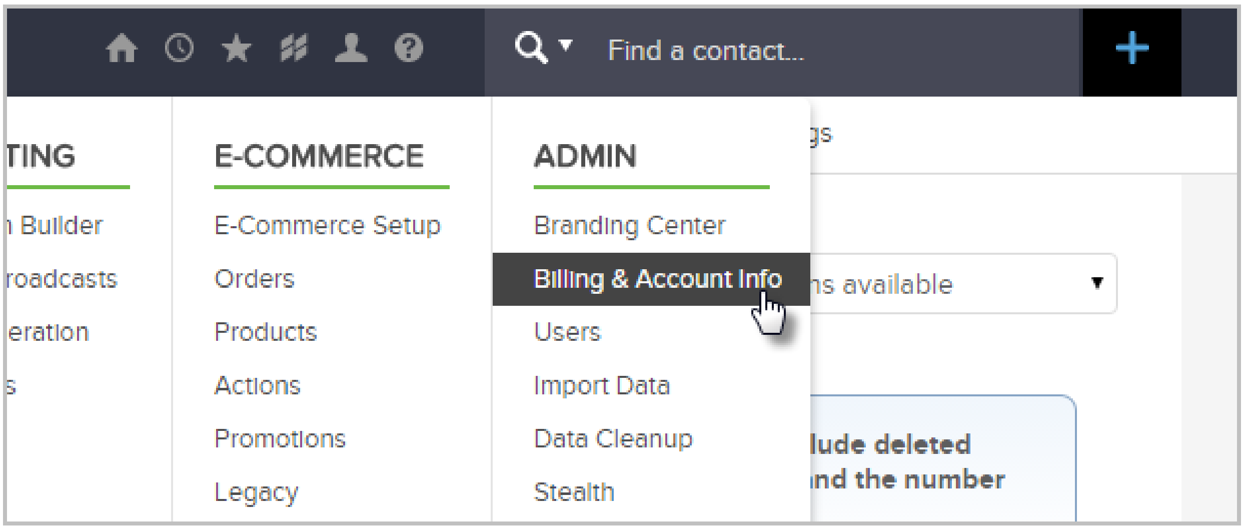
Update Your Billing Information & Make a Payment on Your Account

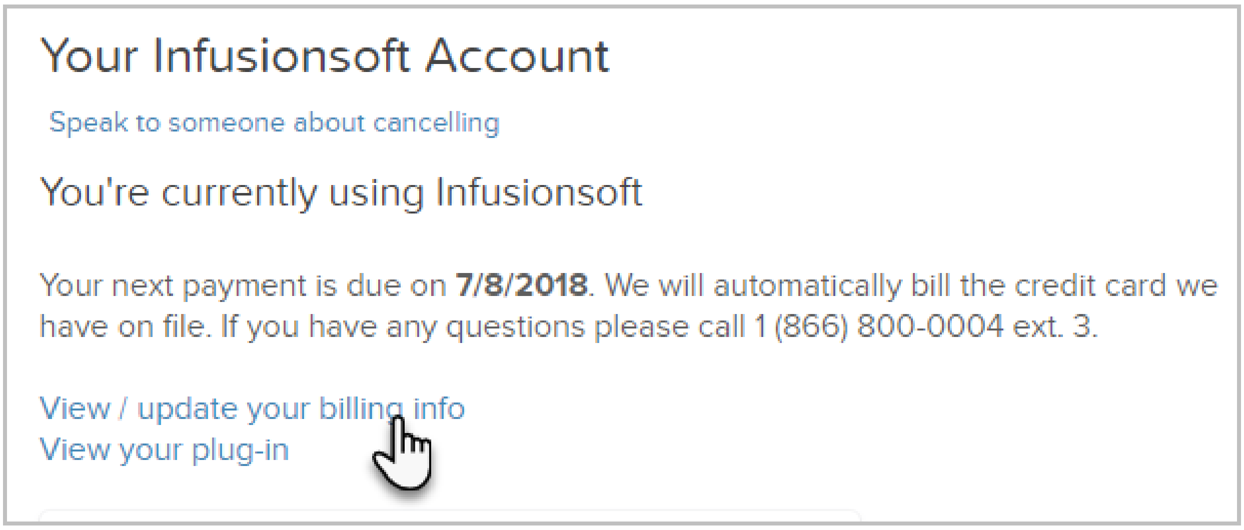
Last Modified on 08/08/2018 1:43 pm MST

View your transactions, print statements, update your credit card, billing address, or make a payment on your account.

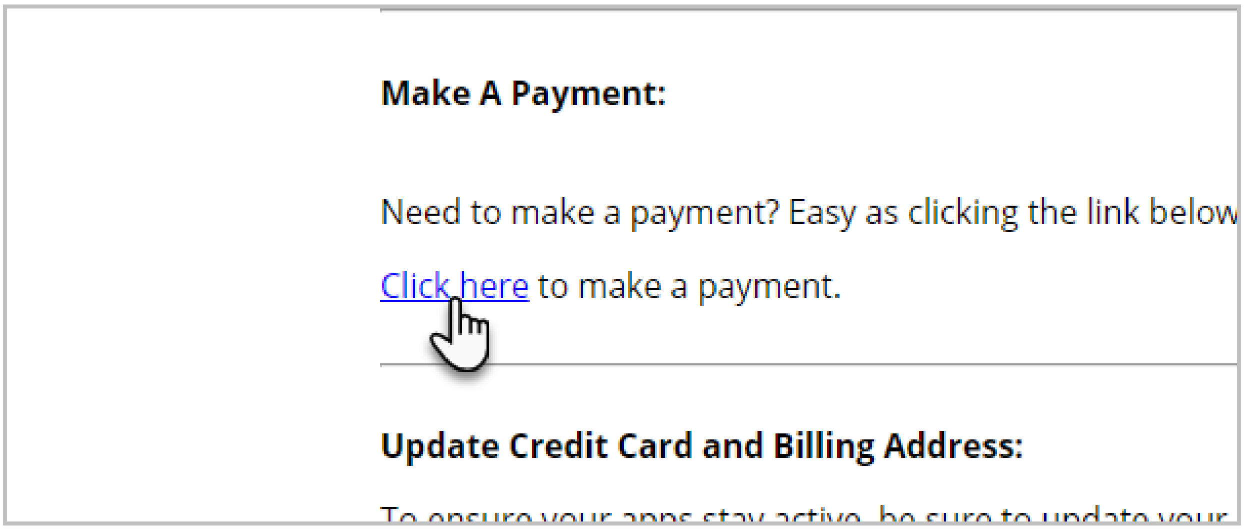
1. Go to **Admin** > **Billing & Account Info**



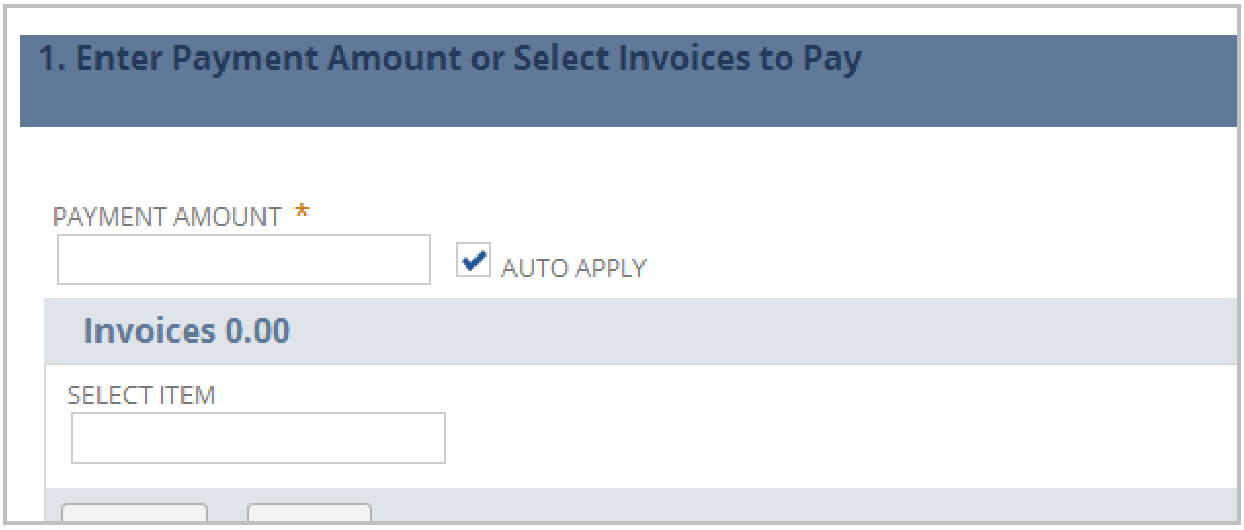
2. Click View / update your billing info



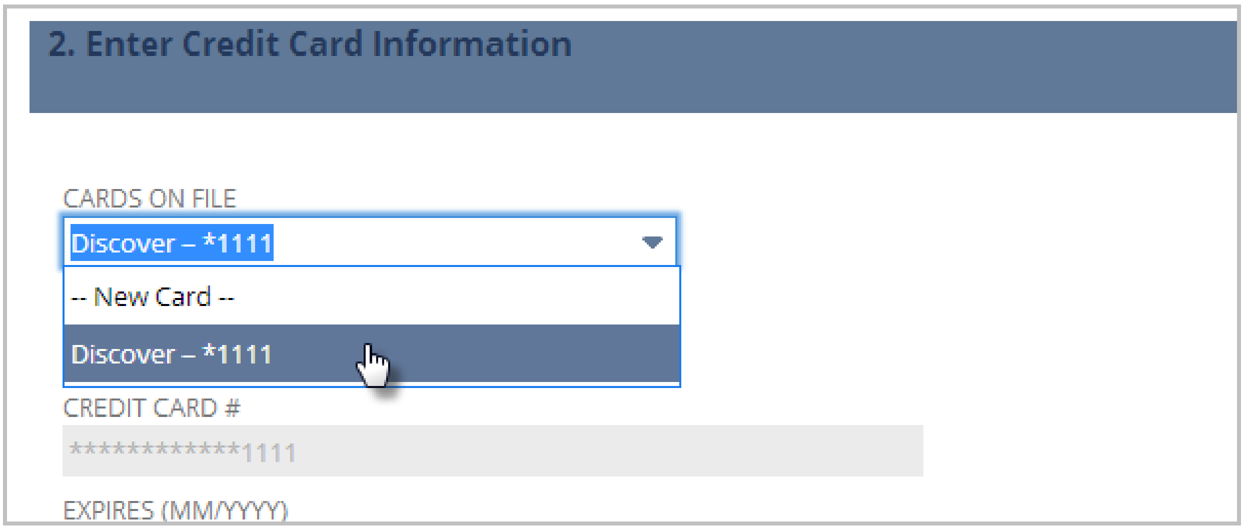
3. Click **Make a Payment**



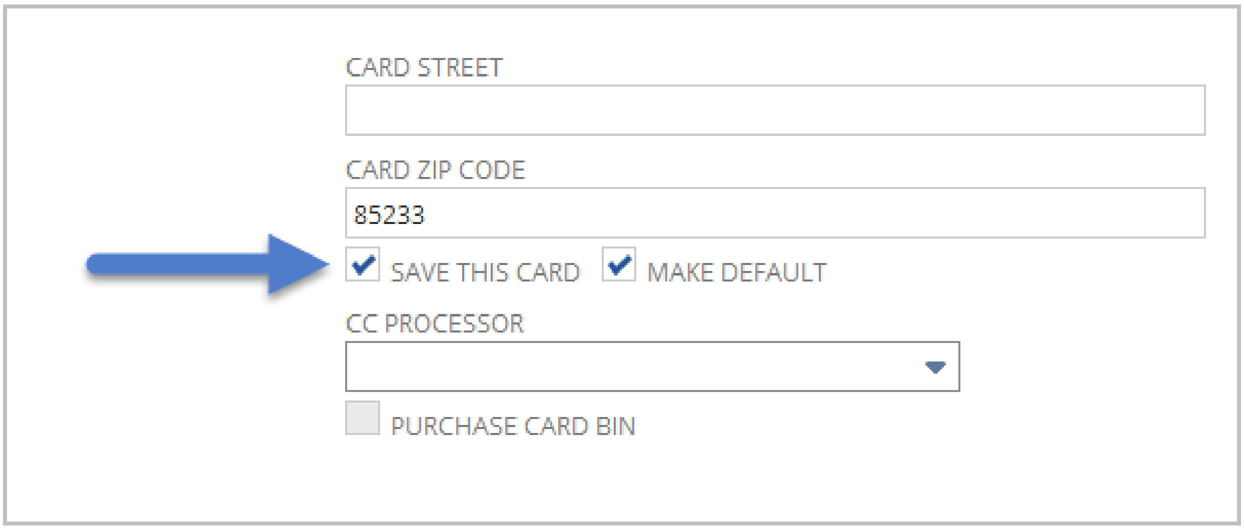
4. Enter the Payment Information



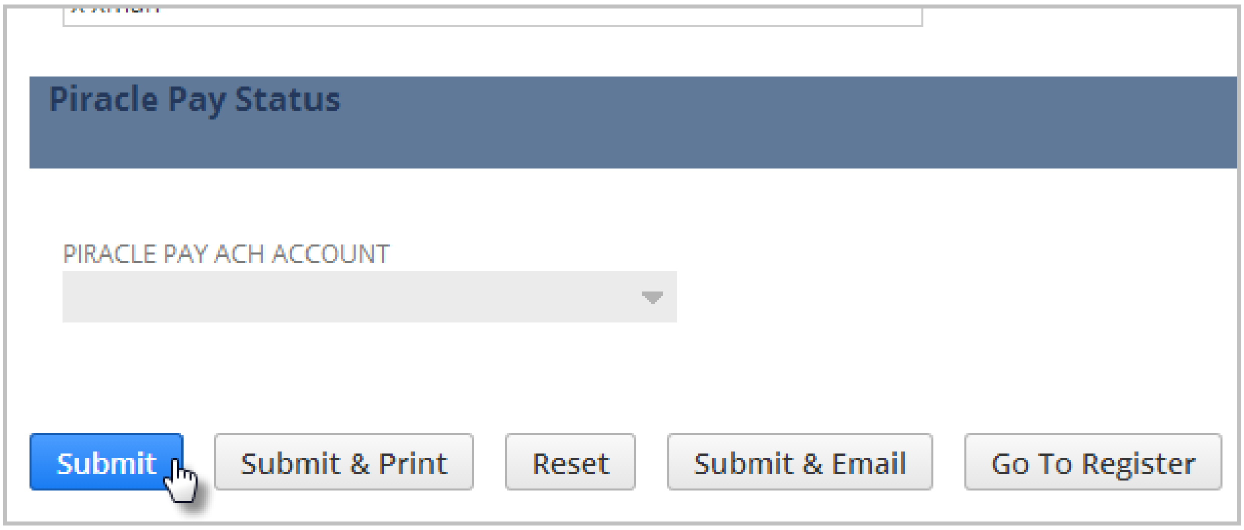
5. Scroll down to Step 2 and select the card you'll use from the *Cards On File* dropdown menu



6. Ensure the billing address is correct at the right side of the screen and, to ensure uninterrupted service, check both boxes for *Save This Card* and *Make Default.*

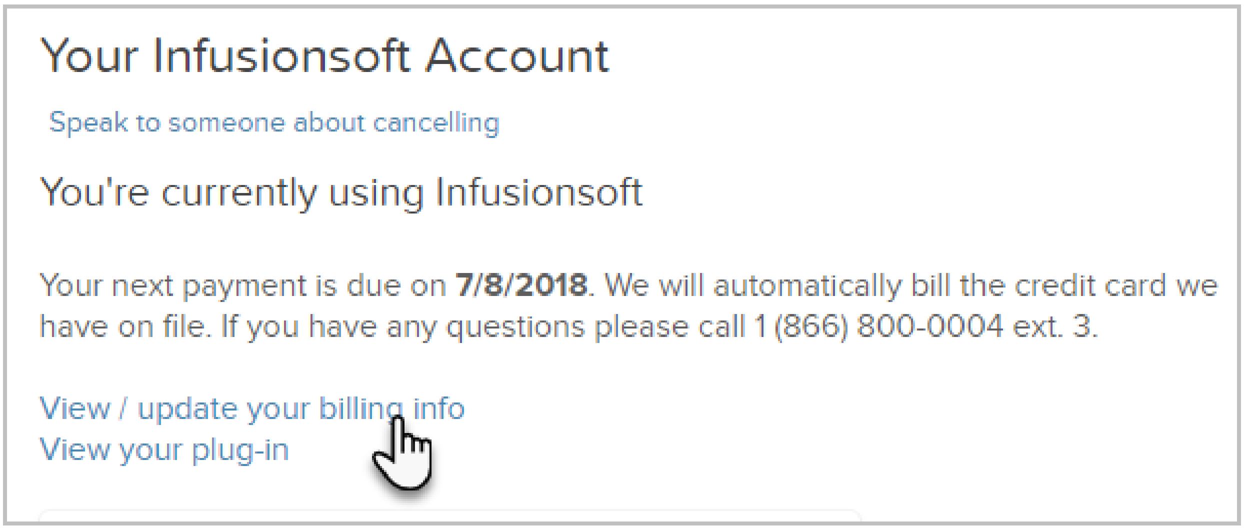


7. Choose any of the Submit buttons at the bottom of the page and that's it! You've successfully made a payment.

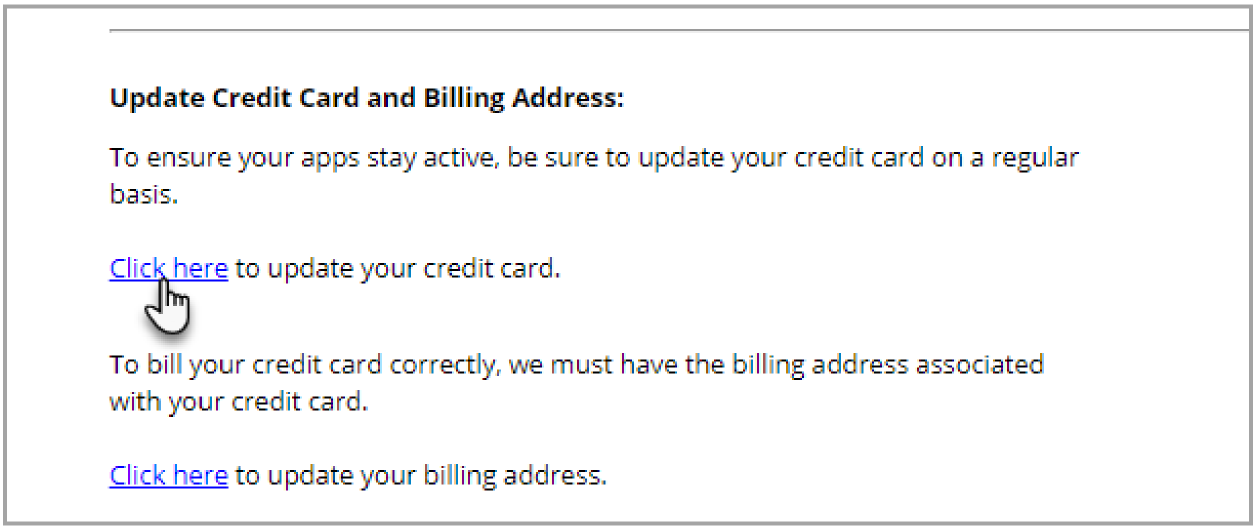


Update Credit Card

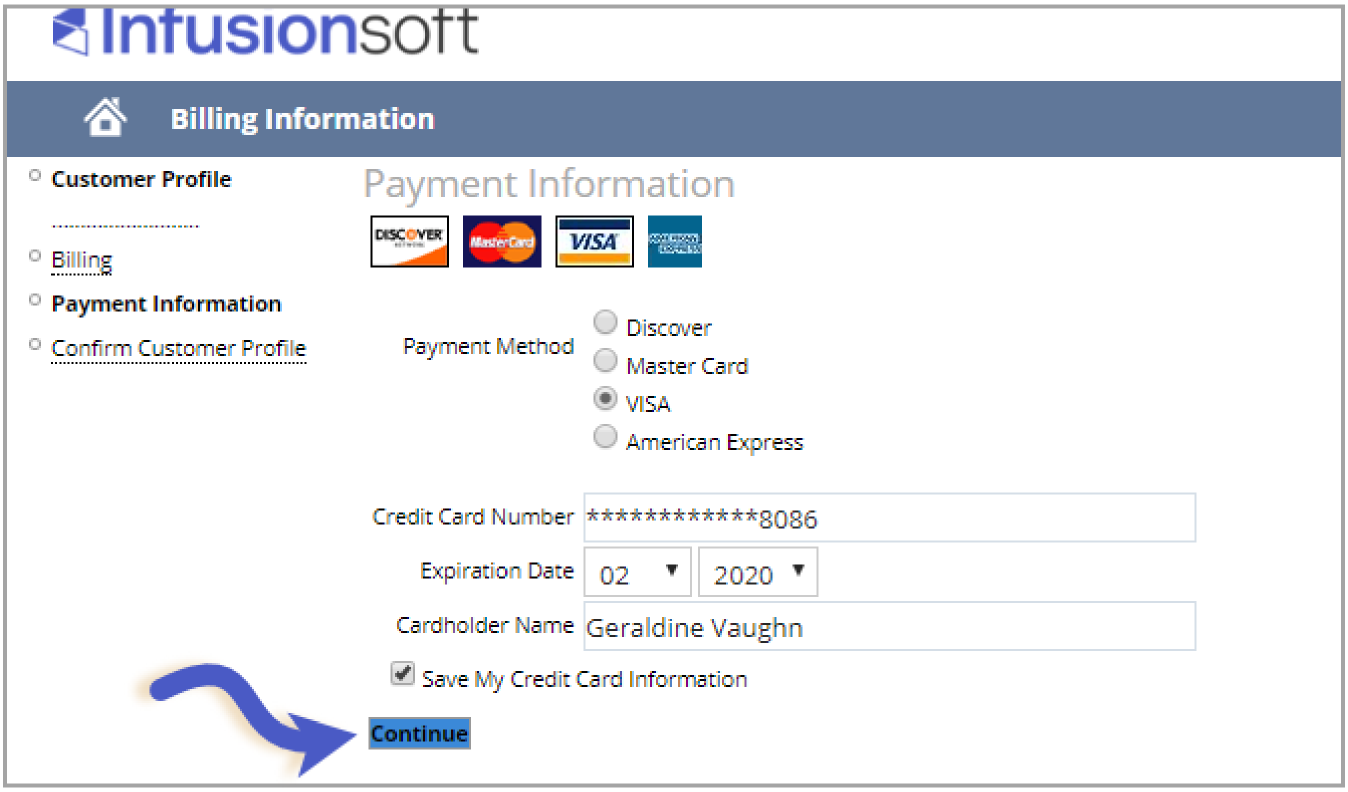
1. Go to **Admin** > **Billing & Account Info** and click **View / update your billing info**



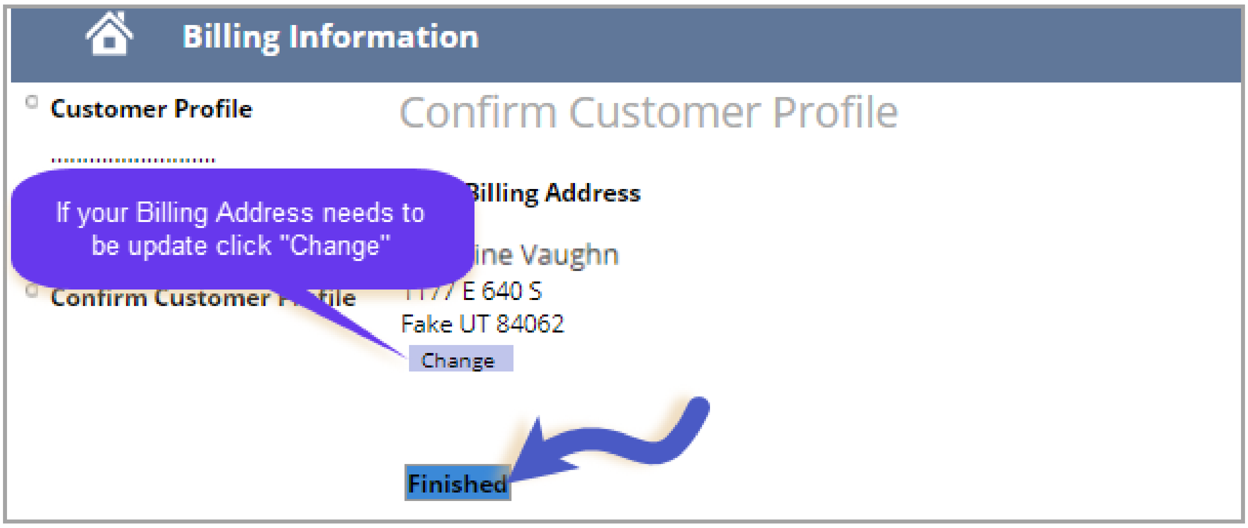
2. Under "**Update Credit Card and Billing Address**" click "**Click here**" next to "**update your credit Card**"



3. Enter your new Card details and click "**Continue**"



4. Click "Finished"



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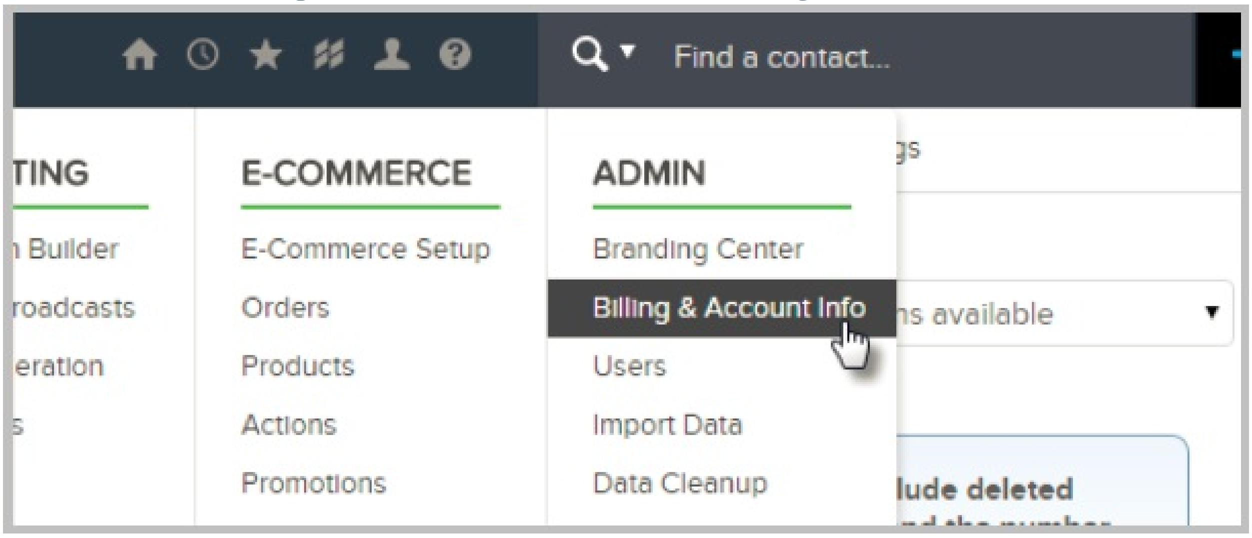
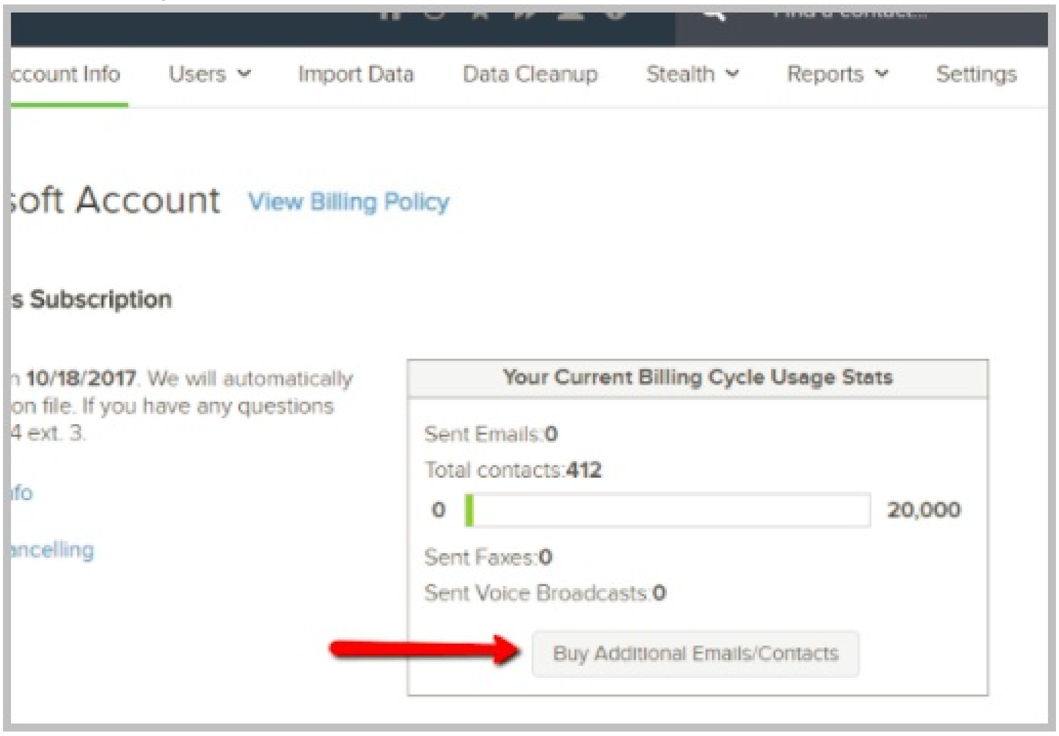
Upgrade Your Account, Users, Or Contact And Email Levels

Last Modified on 08/02/2018 2:08 pm MST

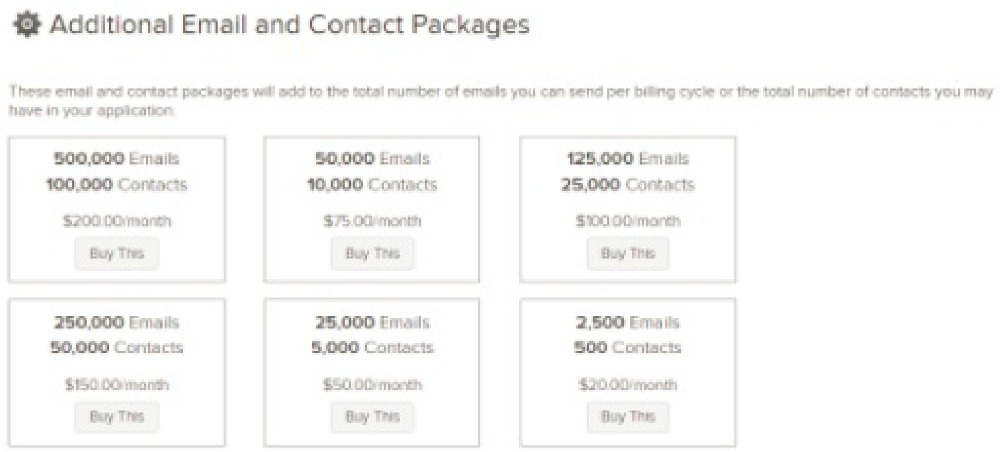
1. Go to **Admin** > **Billing & Account Info** in the main navigation menu



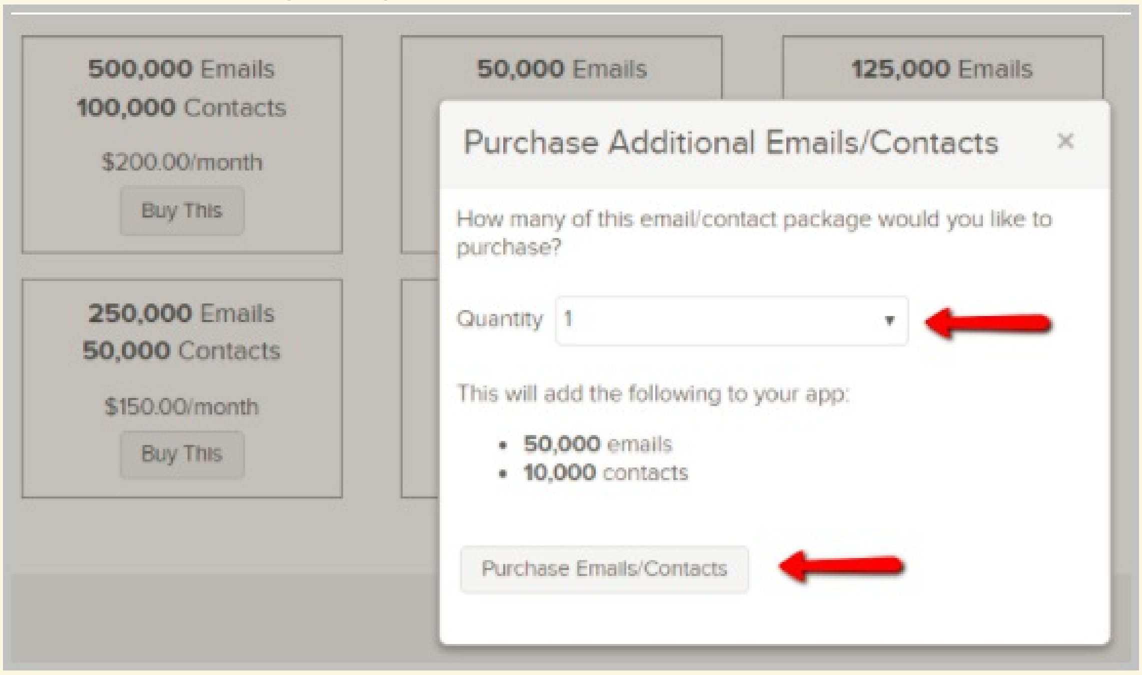
2. Click on Buy Additional Emails/Contacts



3. Click a "Buy This" button for the email/contact option you wish to purchase

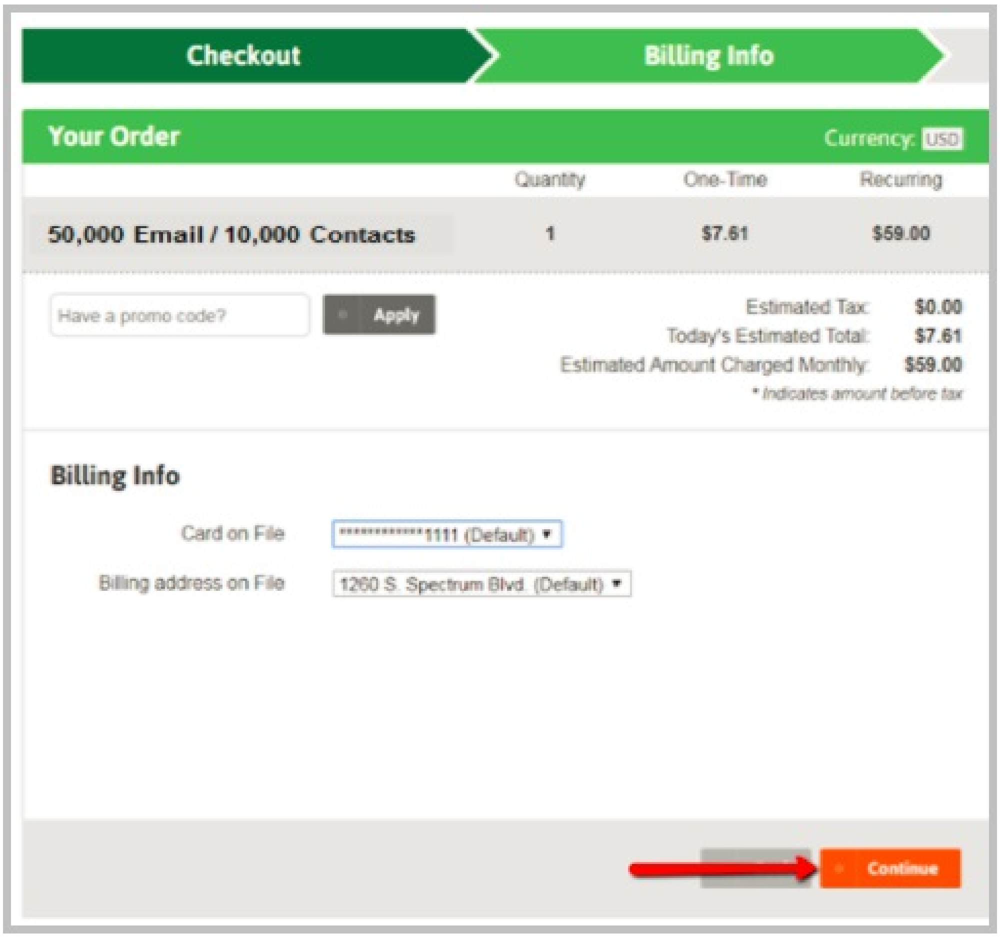


4. Select the desired quantity and click **Purchase Emails/Contacts**

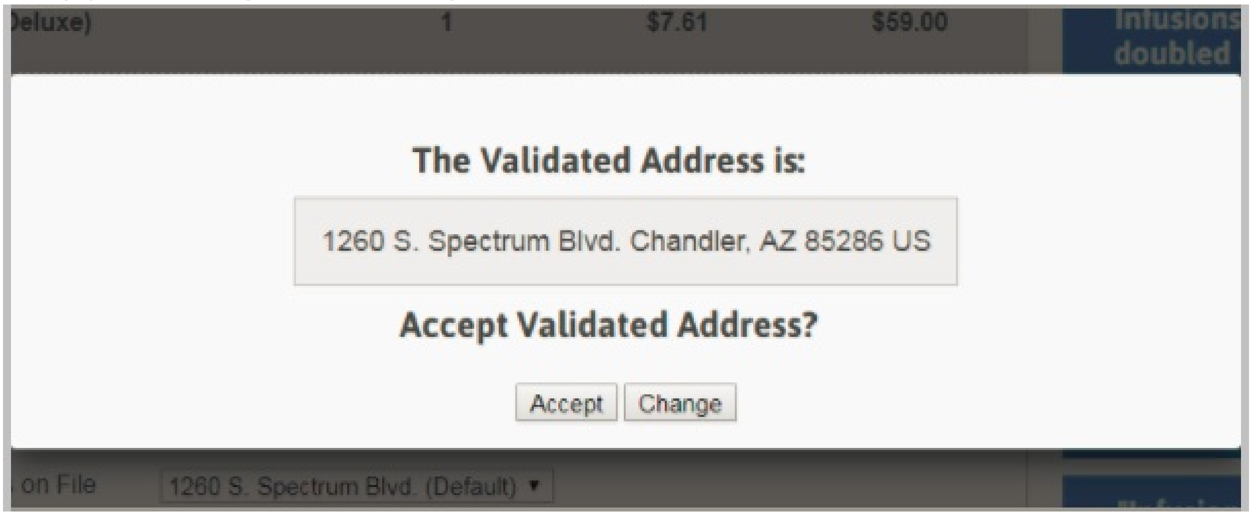


Important Note!
Your selection will add to your existing Contact/Email Levels. Please note your current level, prior to selecting an additional Contact/Email level for purchase

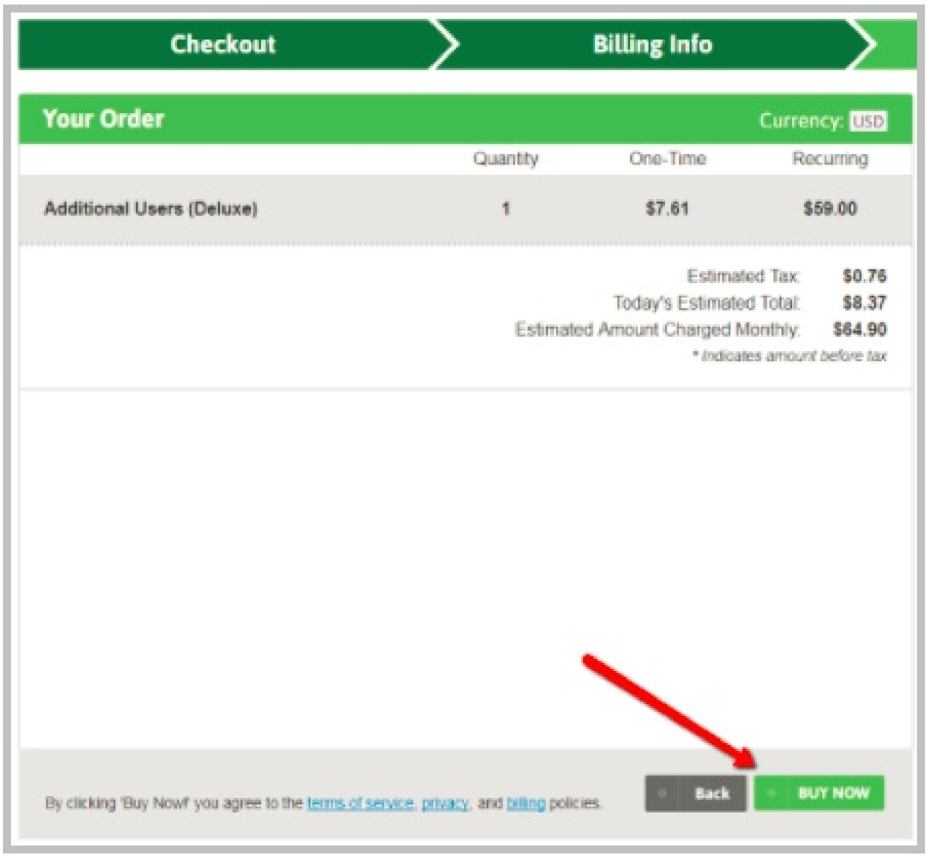
5. This will take you to our online cart. Review your purchase details, which will include a prorated amount for the current time remaining in your billing cycle, as well as the ongoing monthly amount to be added beginning with your next billing cycle. Click Continue



6. Verify your billing address for your card on file



7. Click **Buy Now** to complete your purchase, charging your card on file. If you need further assistance, you can contact our services team at 480-499-6774.


Checkout
Billing Info
Your Order
Currency: USD
Quantity
One-Time
Recurring
Additional Users (Deluxe)
1
$7.61
$59.00
Estimated Tax: $0.76
Today's Estimated Total: $8.37
Estimated Amount Charged Monthly: $64.90
* Indicates amount before tax
By clicking 'Buy Now!' you agree to the terms of service, privacy, and billing policies.
Back
BUY NOW

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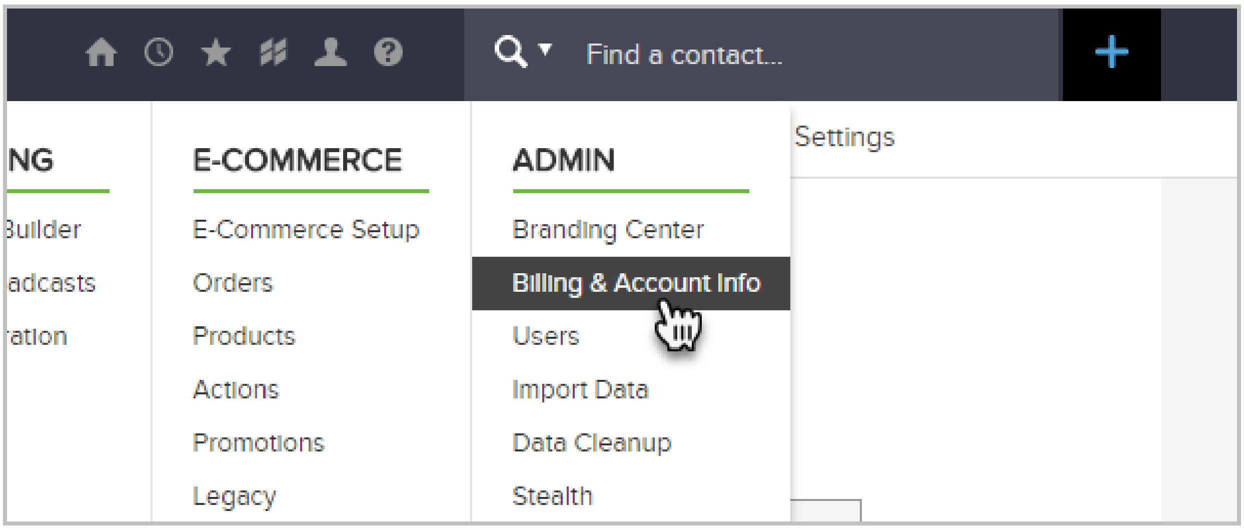
Cancel Your Infusionsoft Services

Last Modified on 08/02/2018 2:09 pm MST

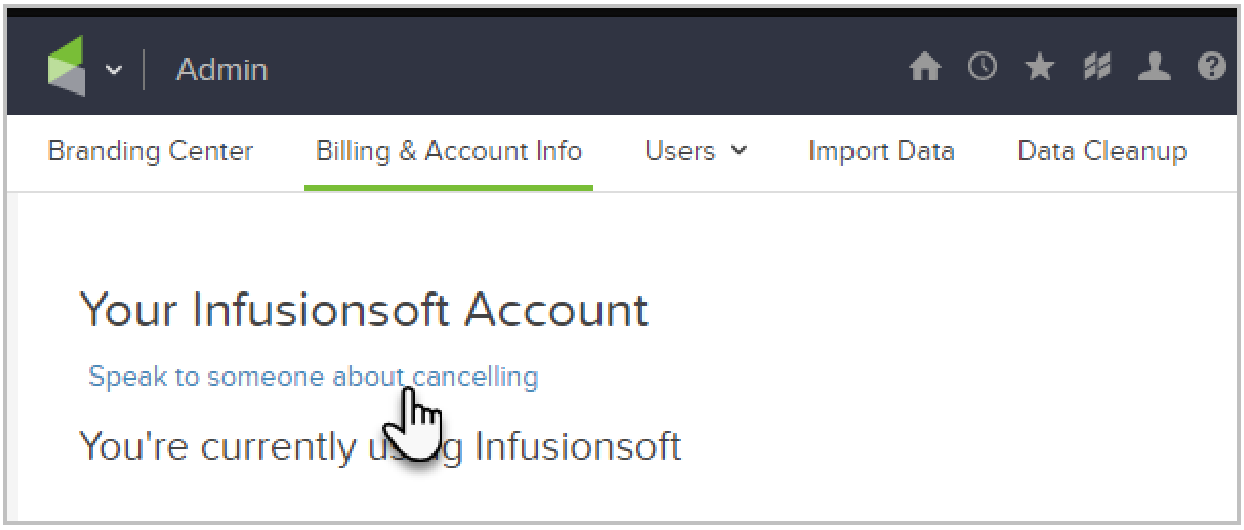
If you wish to submit a cancel request for your Infusionsoft services, please sign into your Infusionsoft account and follow the instructions below. Please note the following:

- You will need to be an administrator in order to request a cancellation
- You will be contacted within one business day of your request

1. Hover over the main menu icon and select, **Billing and Account Info**



2. Click the **Speak to someone about cancelling** link



3. Fill out the form and a representative will contact you within 24 hours

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Additional Packages

Last Modified on 08/02/2018 2:09 pm MST

Additional Packages

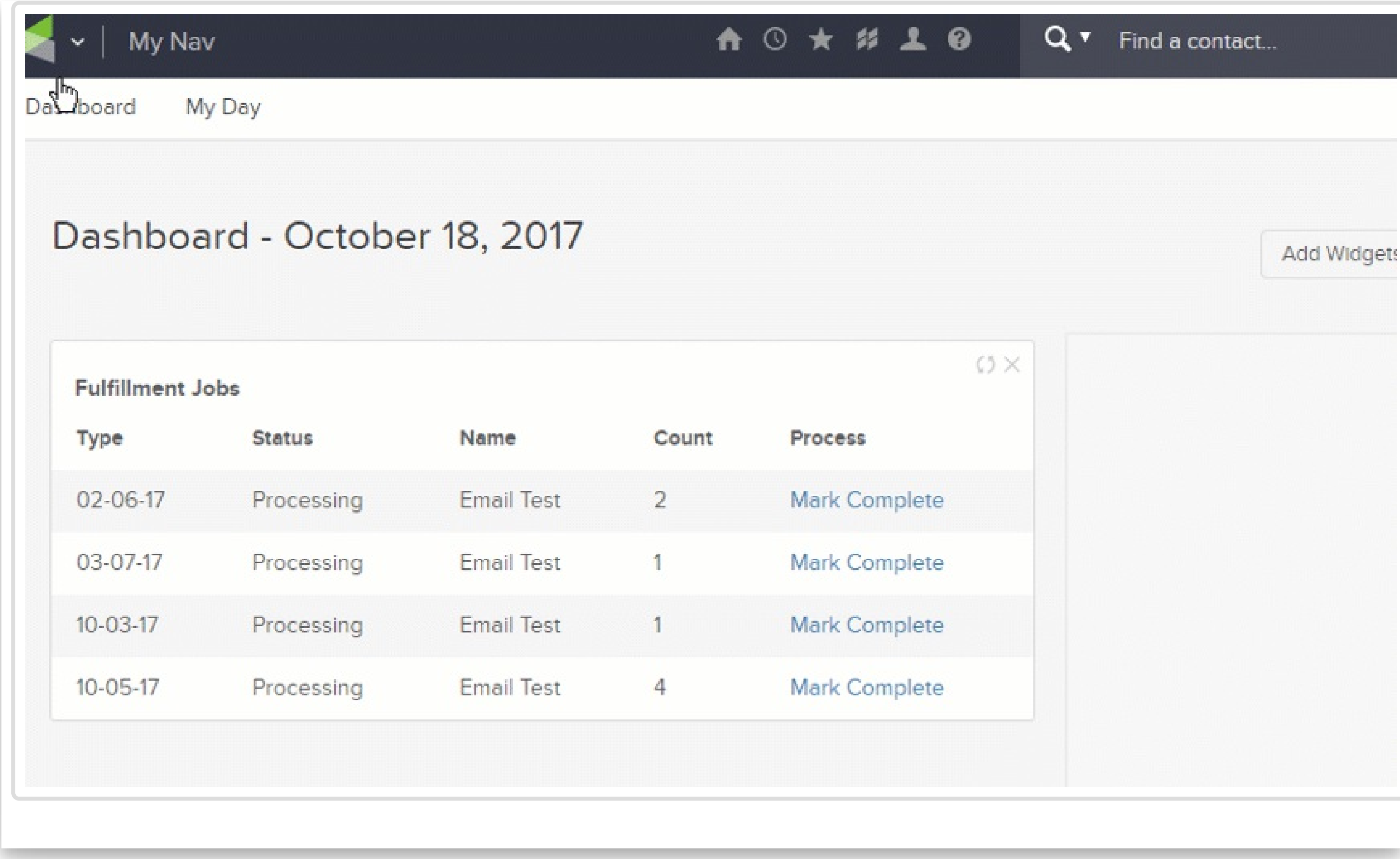
Infusionsoft system administrators can sign into Infusionsoft to upgrade account functionality, and to purchase additional users or contact/email levels. **Removing your Unengaged/unsubscribed contacts will free up contacts space to avoid paying for additional contacts. It's recommend doing this first before adding packages.*

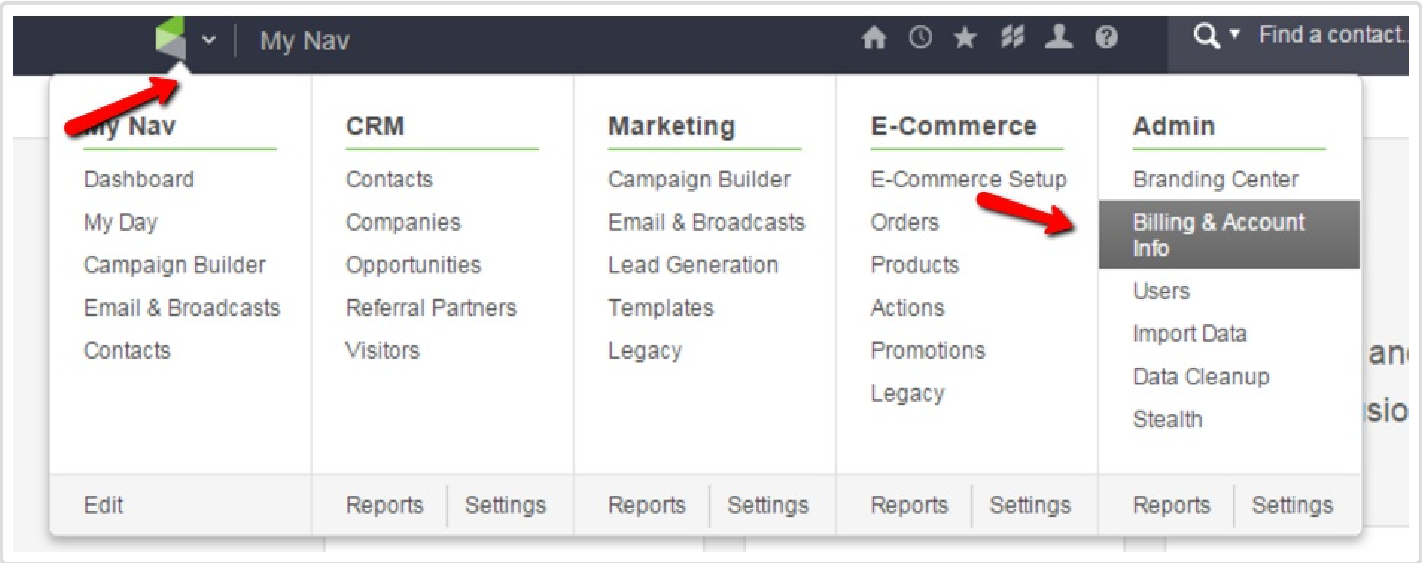
View Video Example

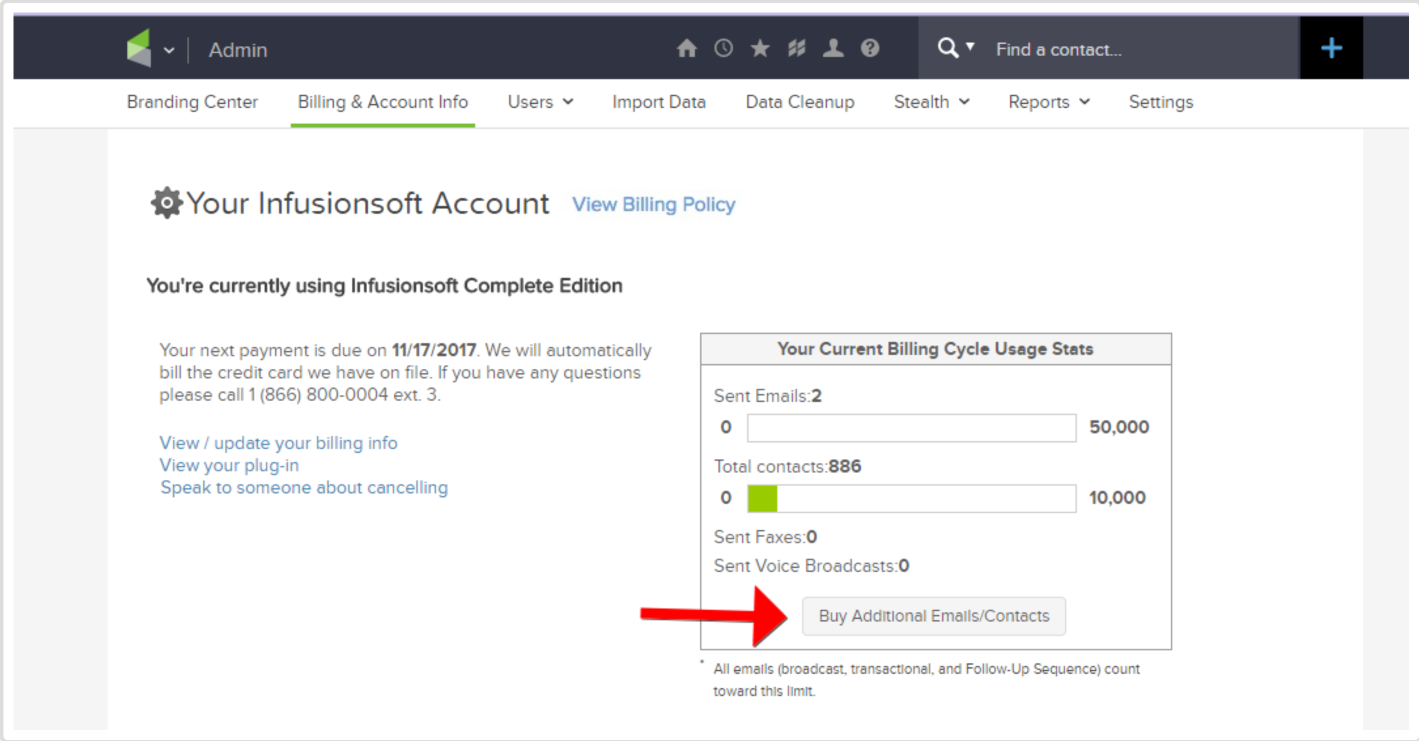
Additional Contacts	Additional Emails per Month	Price per Month
500	2,500	$20
5,000	25,000	$50
10,000	50,000	$75
25,000	125,000	$100
50,000	250,000	$150
100,000	500,000	$200

** There will be a pro-rated amount when the order is submitted and then the full additional package amount will be applied to your next billing cycle.*

- Go to **Admin** > **Billing & Account Info** in the main navigation menu
- Click on Buy Additional Emails/Contacts
- Click a "Buy This" button for the email/contact
- Select the desired quantity and click **Purchase Emails/Contacts**
- This will take you to our online cart.


My Nav
Find a contact...
Dashboard
My Day
Dashboard - October 18, 2017
Add Widgets
Fulfillment Jobs
Type
Status
Name
Count
Process
02-06-17
Processing
Email Test
2
Mark Complete
03-07-17
Processing
Email Test
1
Mark Complete
10-03-17
Processing
Email Test
1
Mark Complete
10-05-17
Processing
Email Test
4
Mark Complete


My Nav
Find a contact
My Nav
Dashboard
My Day
Campaign Builder
Email & Broadcasts
Contacts
Edit
CRM
Contacts
Companies
Opportunities
Referral Partners
Visitors
Reports
Settings
Marketing
Campaign Builder
Email & Broadcasts
Lead Generation
Templates
Legacy
Reports
Settings
E-Commerce
E-Commerce Setup
Orders
Products
Actions
Promotions
Legacy
Reports
Settings
Admin
Branding Center
Billing & Account Info
Users
Import Data
Data Cleanup
Stealth
Reports
Settings


Admin
Find a contact...
Branding Center
Billing & Account Info
Users
Import Data
Data Cleanup
Stealth
Reports
Settings
Your Infusionsoft Account
View Billing Policy
You're currently using Infusionsoft Complete Edition
Your next payment is due on 11/17/2017. We will automatically bill the credit card we have on file. If you have any questions please call 1 (866) 800-0004 ext. 3.
View / update your billing info
View your plug-in
Speak to someone about cancelling
Your Current Billing Cycle Usage Stats
Sent Emails:2
0
50,000
Total contacts:886
0
10,000
Sent Faxes:0
Sent Voice Broadcasts:0
Buy Additional Emails/Contacts
* All emails (broadcast, transactional, and Follow-Up Sequence) count toward this limit.

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Global User Permissions

Last Modified on 08/02/2018 2:12 pm MST

When you add a new user to Infusionsoft, the system automatically grants them global permissions. These permissions should be set for the minimum level of access you want to grant to every new user. After the new user has accepted your invite, you can edit their permissions further based on job-specific responsibilities. As you set up the global permissions, you will learn how each setting affects your user's experience and their ability to complete certain tasks. Global permissions do not apply to users who are added to the **Admin** user group - permissions for users in this group are automatically set to **Yes**.

1. Go to **Admin** > **Settings** in the main navigation menu.

2. Click on **User** in the **User Settings** menu.

3. Click on the **Global Permissions** link. Review and/or change the global permissions for each area of the software. Each area is explained in the following articles:
    1.
4. The system automatically applies the change and confirms it with a green check

mark.Permissions are divided into tabbed sections based on general and role-related categories. Within a tab, there may be sub-headers that further segment the specific permissions. Setting up Global Permissions is generally a one-time task. However, you may need to edit user permissions based on the user's job responsibilities.

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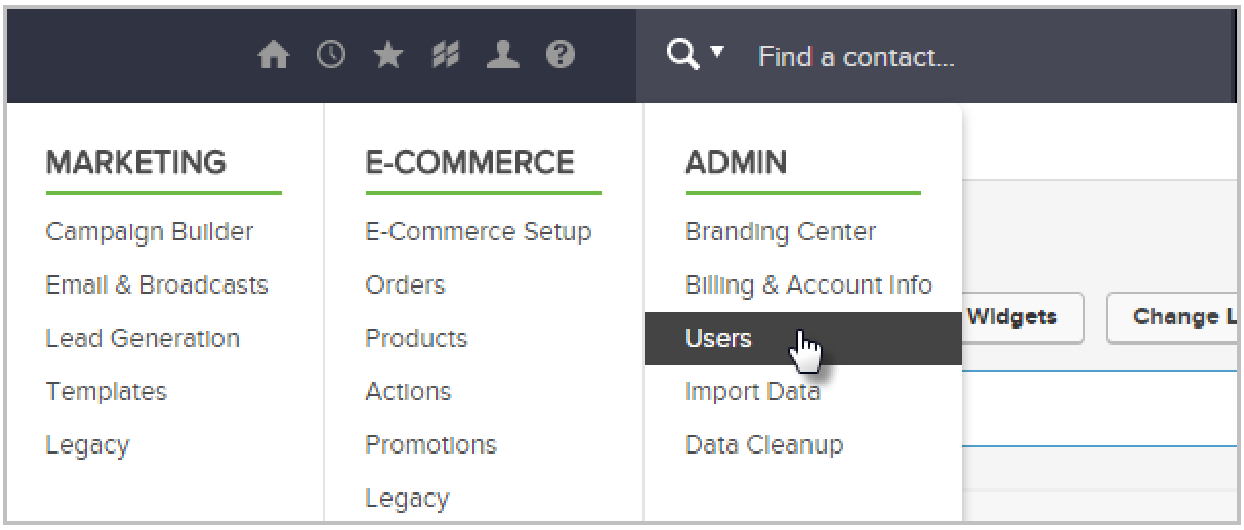
Add a User to the Admin or Sales Rep Group

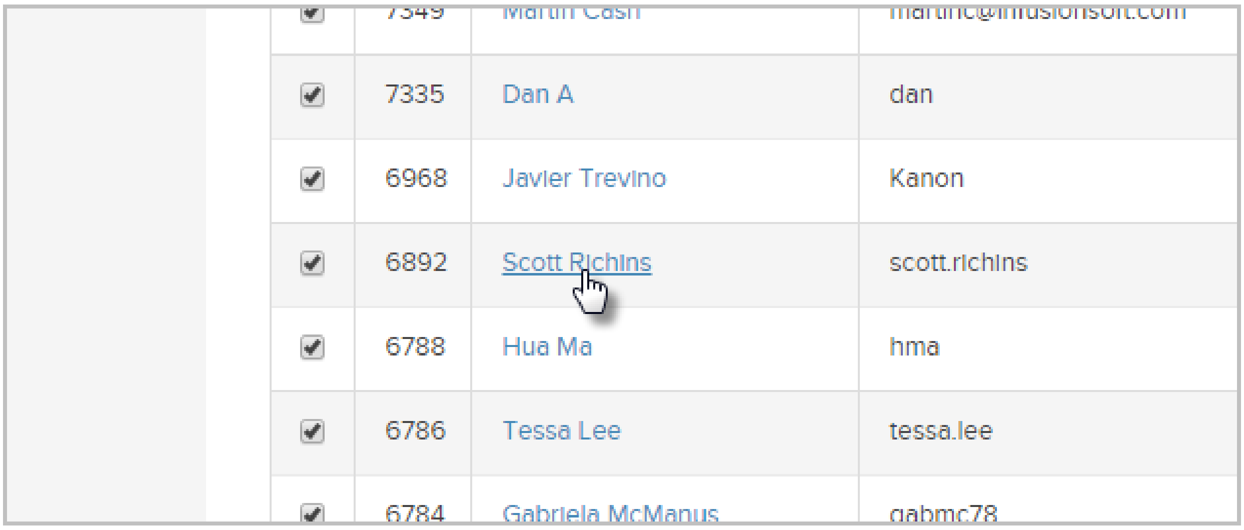
Last Modified on 08/02/2018 2:12 pm MST

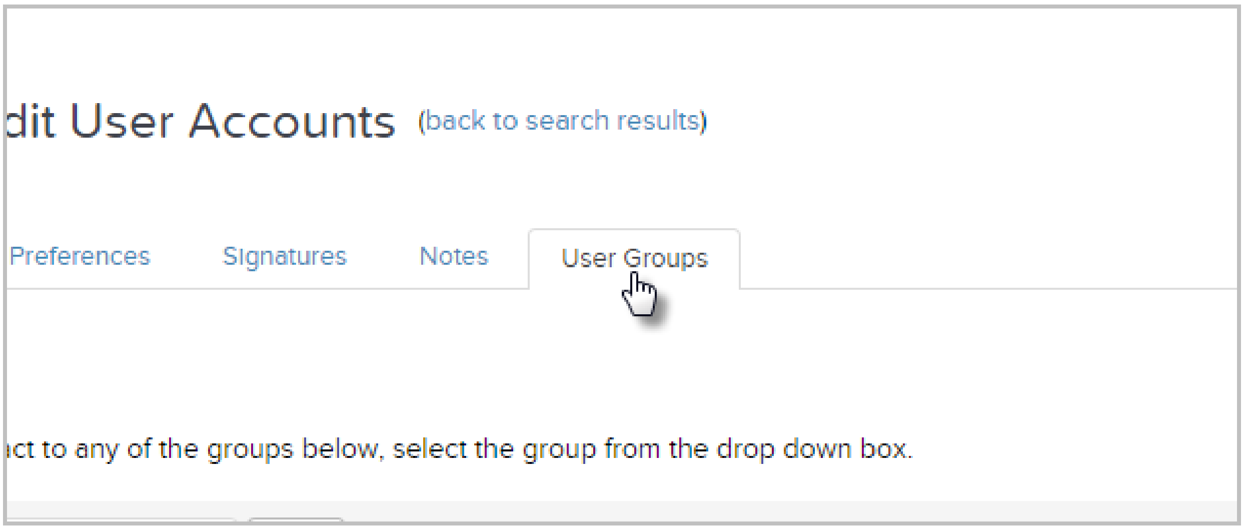
Protip! The only user groups you'll need to concern yourself with are the **Admin** and **Sales Rep** groups. The other user groups can be ignored as they no longer serve a purpose in Infusionsoft.

- **Admin:** Allows a user to access all settings and features in your account with very few restrictions.
- **Sales Rep:** Allows a user to **own** an Opportunity record . A user that is not in the Sales Rep group can view and edit these records, but they cannot own them. In short, any user that is a sales person needs to be in this group!

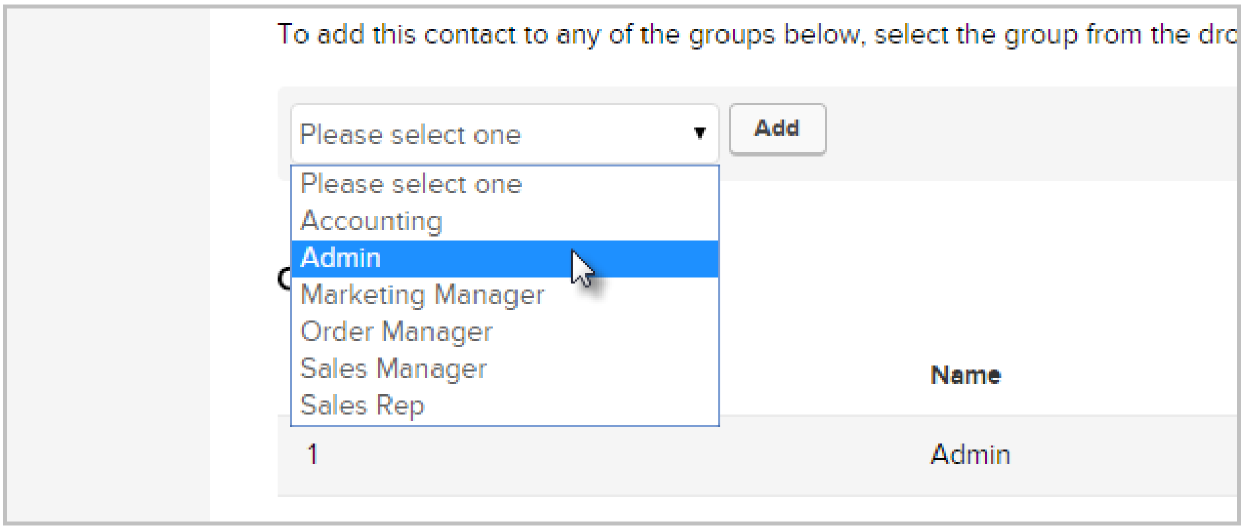
1. Navigate To **Admin > Users**. Hover over the Infusionsoft logo and then click on the **Users** option under the **Admin** area. From there, click on the name of the user you would like to edit, then click on their **User Groups** tab.



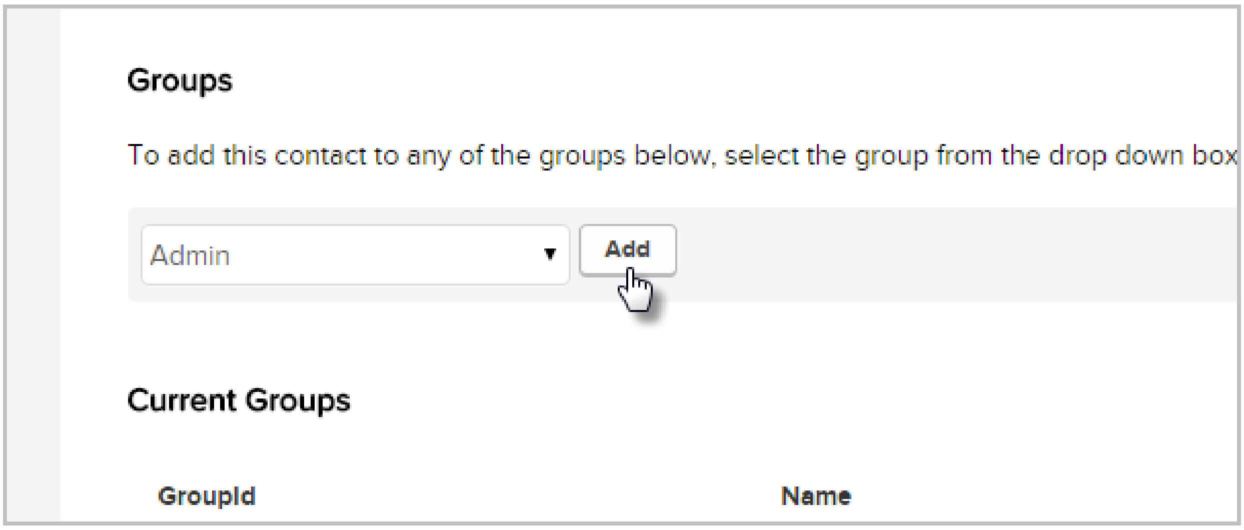




2. To add the user to a group, click on the **Please Select One** drop-down and then on the group you wold like to add this user to.



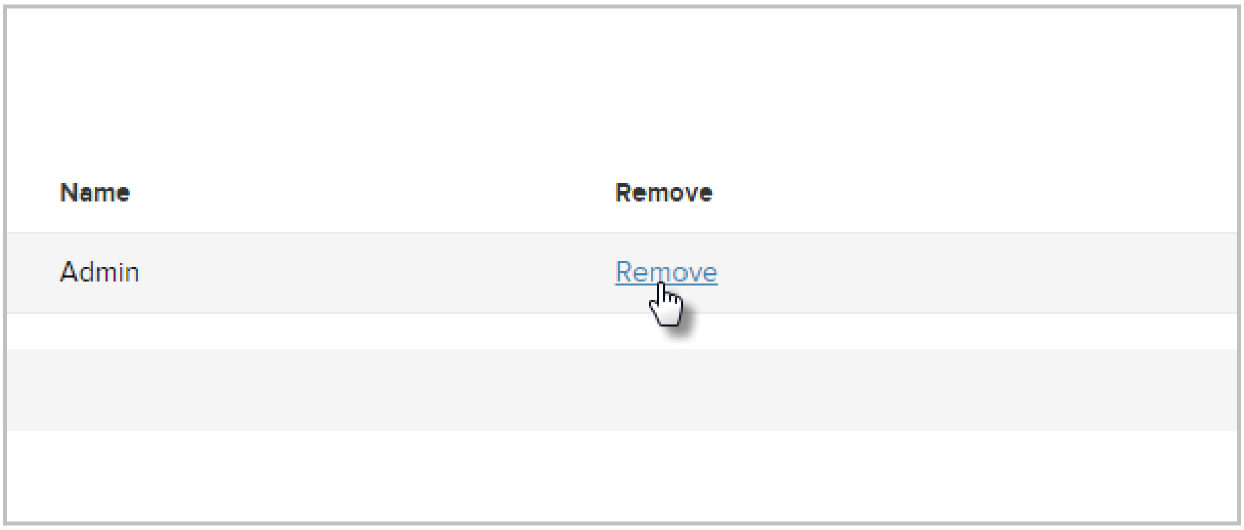
3. Click on the **Add** button



4. **Pro-tip!** Clicking on the **Save** button will not add a user to a group. Only the **Add** button will!

5. To remove a user from a group, navigate to user's profile under the **User Groups** tab as shown above.

6. Click on the **Remove** link corresponding with the Group to be removed.



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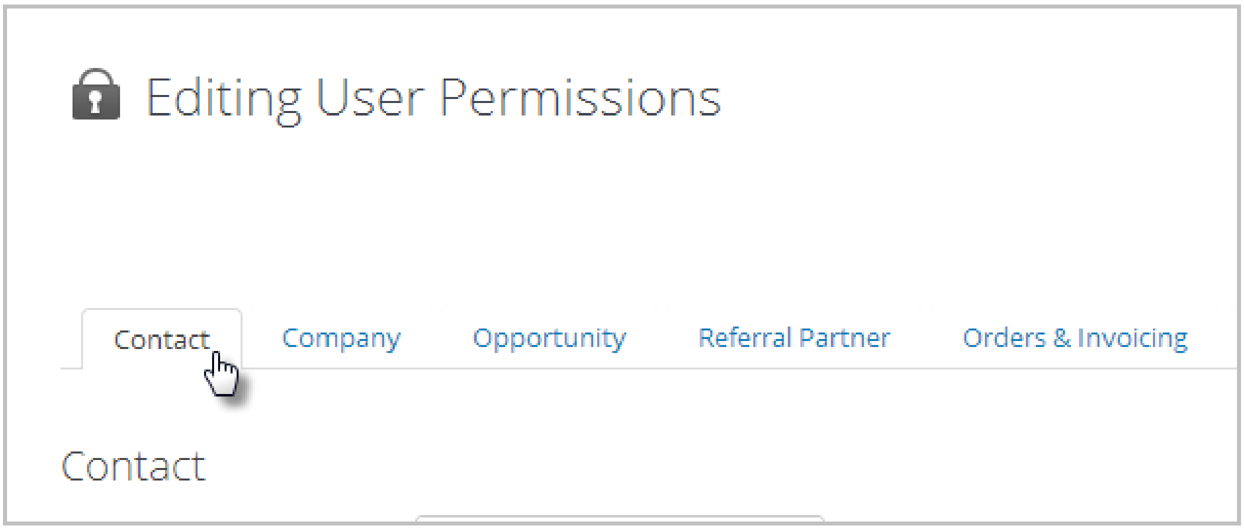
User Permissions - Contact

Last Modified on 08/02/2018 2:12 pm MST

These permissions determine how a user can interact with contact records inside of Infusionsoft. To access these User Permissions, go to **Admin** > **Users** and click **Edit Permissions** next to the user you would like to modify.



Can re-assign

This permission controls the ability to change the owner of a contact record. The owner is the user who is primarily responsible for maintaining a relationship with an individual contact. If this permission is set to *No*, the user will not be able to change the assigned user for any contact records.

Can add

This permission controls the ability to add a new contact into Infusionsoft. If this permission is set to No, the user will not see the option to Add a Contact in the CRM area menu.

Can use note templates

This permission controls the ability to add a preconfigured note template to a contact. If this permission is set to *No*, the user will not be able to search for or use any of the note templates you have created within the campaign builder or in the templates list (Marketing > Templates.) The user will still be able to add a custom note to a contact to document a specific conversation or event.

Can un-merge

This setting that does not apply to Infusionsoft users.

Can delete

This permission controls the ability to delete contacts. If this permission is set to *No*, the user will not have the option to delete contacts while in a contact record. They will also not have the option to delete contacts en masse under the *Actions* menu at the top of a contact search result.

Can view unassigned records

This permission controls the ability to see contacts that have no assigned owner. If this permission is set to *No*, the user will not be able to view or edit any contact records that are not assigned to any of your users.

Can change lead source

This permission controls the ability to update the lead source within a contact record. If this permission is set to *No*, the user will be able to see the lead source field, but will not be able to change it.

Can view all records

This permission controls the ability to view the contacts that are assigned to other users. If this permission is set to *No*, the user will only be able to view contacts they own.

Can edit all records

This permission controls the ability to edit contacts that are assigned to other users. If the *Can view all records* permission is set to *Yes*, and this permission is set to *No*, the user will be able to view contacts assigned to other users, but will not be able to edit them.

Can search

This permission controls the ability to search for contacts. If the *Can add* permission is set to *Yes*, the user is still able to enter a new contact into the system; however, they will not be able to search for it after they leave the contact screen.

Can edit unassigned records

This permission controls the ability to edit the contacts that have no owner assigned. If the *Can view unassigned records* permission is set to *Yes* and this permission is set to *No*, the user will be able to view the unassigned contacts, but will not be able to edit them.

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User Permissions - Company

Last Modified on 08/02/2018 2:13 pm MST

These permissions determine how a user can interact with company records. The company record links multiple contacts to a single company account. The company record is used most frequently in a B2B business model. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view company records. If this permission is set to *Yes*, the user can view the company records associated with the contacts they have permission to view. If this permission is set to *Yes* and the *Can search* permission is set to *No*, the user will not be able to access companies through the main navigation menu; they can only access them through a contact's company link. If this permission is set to *No*, the user will not be able to view any company records.

Can edit all records

This permission controls the ability to edit company information.

Can add

This permission controls the ability to create a new company record. If this permission is set to *No*, the user will not be able to create a company record.

Can search

This permission controls the ability to search for companies or view a list of companies. If the *Can add* permission is set to *Yes*, the user is still able to create a new company record, but will not be able to search for it later.

Can delete

This permission controls the ability to delete companies. If this permission is set to *No*, the user will not see the **Delete** button in a company record or the **Delete Companies** option under the *Actions* menu.

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User Permissions - Opportunities

Last Modified on 08/02/2018 2:13 pm MST

These permissions determine how a user can interact with opportunity records which are used to track and manage a direct sales process. To access these User Permissions, go to **Admin** > **Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view the opportunity records that are assigned to other users. If this permission is set to *No*, the user can view the opportunity records that they own or the ones that have been shared with them; they cannot view any other opportunity records. A contact may have multiple opportunities. Each opportunity can have a different assigned owner. A sales rep may own one or more opportunities for a contact, but may or may not be the owner of the contact record the opportunity is associated with.

Can edit all records

This permission controls the ability to edit opportunity records assigned to other users. If this permission is set to *No*, the user can edit the opportunities that they own or the ones that have been shared with them (with "write" access.) They will not be able to edit any other opportunity records, even if they can view them.

Can add

This permission controls the ability to create new opportunities. If this permission is set to *No*, the user will not see the option to *Add an Opportunity* and will not see the *Add Opportunity* button when viewing a contact record.

Can search

This permission controls the ability to search for opportunities through the quick search or view a list of opportunities.

Can delete

This permission controls the ability to delete opportunities. If this permission is set to *No*, the user will not see the *Delete* button on an opportunity record or the *Delete Opportunities* option under the *Actions* menu at the top of an opportunity search result.

Can edit closed leads

This permission controls the ability to edit an opportunity after it has been placed into the default *won* or *lost* stage. If this permission is set to *No*, the user will only be able to save changes to opportunities that are not in one of these 2 default stages.

Can reassign

This permission controls the ability to change the assigned owner of an opportunity record. The owner is usually the the sales rep who is actively working with the prospect. A sales manager may need to reassign opportunities from one rep to another; however, a sales rep probably would not be responsible for reassigning opportunities. If this permission is set to *No*, the user will not be able to change the assigned owner.

Can see tab

This permission controls access to opportunities through contact records. If this permission is set to *No*, the user will not see the *Opportunities* tab in the second row of tabs in contact records.

Can recreate pipeline reports

This permission controls the ability to create pipeline reports for sales rep users. The pipeline reports are created through *CRM > Settings > Sales Pipeline.* Pipeline reports are generally created by sales managers for their sales reps. The reports show up in the Favorites menu on the user toolbar. If this permission is set to *No* the user is denied access when they click on the *Rebuild Pipeline* button.

Can view unassigned records

This permission controls the ability to see opportunities that have no assigned owner. If this permission is set to *No*, the user will not be able to view or edit any contact records that are not assigned to any of your users. A sales manager would need the ability to view (and edit) unassigned records to make sure no opportunities are being overlooked.

Can edit unassigned records

This permission controls the ability to edit the opportunities that have no assigned owner. If the *Can view unassigned records* permission is set to *Yes*, and this permission is set to *No*, the user will be able to view the unassigned opportunities, but will not be able to edit them.

User Permissions - Referral Partners

Last Modified on 08/02/2018 2:14 pm MST

These permissions determine how a user can interact with referral partner records. To access these User Permissions, go to **Admin** > **Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view referral partner records. If this permission is set to *No*, the user is denied access to referral partner records.

Can edit all records

This permission controls the ability to update a referral partner record. If this permission is set to *No*, the user will see an *access denied* message when they try to edit and save updates to a referral partner record.

Can add

This permission controls the ability to create new referral partner records. If this permission is set to *No*, the user will not see the option to *Add a Referral Partner* from the main menu.

Can search

This permission controls the ability to search for referral partners. If the *Can add* permission is set to *Yes*, the user is still able to create a new referral partner record, but will not be able to search for them later.

Can delete

This permission controls the ability to delete referral partners. If this permission is set to *No*, the user will not see the *Delete* button in a referral partner record or the *Delete Referral Partners* option under the *Actions* menu at the top of a referral partner search result.

Can set commissions

This permission controls the ability to set up commissions for individual referral partners within a referral partner record. If this permission is set to *No*, the user will be denied access if they try to add or edit a referral partner's commissions.

Can view commissions

This permission controls the ability to view partner ledgers from within a referral partner record or from the referral partner ledger report. If this permission is set to *No*, the user will be denied access if they try to view a referral partner ledger.

Can create payouts

This permission controls the ability to record commission payments in individual referral partner ledgers or batch record payments through the referral partner ledger report. If this permission is set to *No*, the user will not see the *Create Payment* button in individual ledgers or the *Create Referral Partner Payments* option in the *Actions* menu at the top of the referral partner ledger report.

Can delete payouts

This permission controls the ability to delete payments in individual referral partner ledgers or batch delete payments through the referral partner payment search. If this permission is set to *No*, the user will not see a *Delete* button when editing a payment record in a referral partner ledger or the *Delete Aff Payouts* option in the *Actions* menu at the top of the referral partner payment search.

Can manage referral partner programs

This permission controls the ability to view, create, and edit referral partner commission programs. The commission programs generally apply to groups of partners who earn the same commission. If this permission is set to *No*, the user will not see the *Commission Programs* option in the main menu. If this permission is set to *Yes*, the user can do everything required to set up and manage the commission programs.

Can manage referral partner redirects

This permission controls the ability to view, create, and edit referral tracking links. Referral tracking links are the links referral partners use in emails and web pages to get credit for their referrals. If this permission is set to *No*, the user will not see the *Referral Tracking Links* option in the main menu. If this permission is set to *Yes*, the user can do everything required to set up and manage the tracking links.

Can manage referral partner resources

This permission controls the ability to view, create, and edit partner promotional resources (emails, banners, and pages.) If this permission is set to *No*, the user will not see the *Promotional Resources*option in the main menu. If this permission is set to *Yes*, the user can do everything required to set upand manage the email, banner, and web page resources for your referral partners.

Can create affiliate records in bulk

This permission controls the ability to batch create referral partner records for a list of contacts.

Can set referring Referral Partner in bulk

This permission controls a user's ability to batch assign a referral partner to a list of contacts or opportunities. If this permission is set to *No*, the user will not see the *Create Referral Partner Referral* option in the *Actions* menu at the top of a contact or opportunity search.

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User Permissions - Orders And Invoicing

Last Modified on 08/02/2018 2:14 pm MST

The Order & Invoice permissions determine how a user can interact with existing orders and the Infusionsoft billing features. They apply to users who are responsible for creating manual orders, managing existing orders, invoicing customers, and updating billing information. They also apply to the user who is responsible for integrating your merchant account with Infusionsoft. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Orders & Invoicing

These permissions control a user's ability to manage credit card information, set up merchant accounts, sales tax tables, etc...

- **Can edit credit cards:** This permission controls access to customer credit card information. If it is set to *No*, the user will not see a clickable credit card link (e.g., Visa) or the *Add Credit Card* button when viewing a contact's order history.
- **Can charge credit cards**: This permission controls the ability to add an order payment, regardless of the payment method. If it is set to *No*, the user will not see the *Add Payment* button when adding a new order or viewing an existing order record. In addition, the user will not be able to process a refund. If the *Can charge in bulk* invoice permission is set to *Yes*, the user will still be able to charge invoices in bulk.
- **Can manage merchant accounts:** This permission controls the ability to add or edit merchant accounts. If it is set to *No*, the user will receive an *access denied* message when trying to add or edit a merchant account through *E-Commerce > Settings* or through *E-Commerce Setup > Payment Options*. The user can still view the merchant account list in various areas of the system and select a merchant account when processing a payment.
- **Can manage sales tax**: This permission controls the ability to add or edit sales tax percentages. If it is set to *No*, the user will receive an *access denied* message when trying to add or edit sales tax information through E-Commerce > Settings or through E-Commerce Setup > Taxes.

Invoice

These permissions control the ability to send and manage customer invoices.

- **Can send**: This permission controls the ability to send invoices to clients. If it is set to *No*, the user will not see the *Preview Invoice* or *Send Invoice* buttons when viewing a customer's order.
- **Can see account summary:** This permission controls the ability to view the account summary for individual contacts. If it is set to *No*, the user will not see order and balance due totals when viewing a contact record or the *Show Invoices* button.
- **Can charge invoices in bulk**: This permission controls the ability to run autocharges for a list of invoices. If it is set to *No*, the user will not see the option to *Attempt Charge for Invoices* in the *Actions* drop down menu when viewing a list of invoices (i.e., through the failed invoice report.)
- **Can manage failed invoices in bulk**: This permission controls the ability to manage failed invoices (e.g. void invoices and remove them from the customer's subscription plan.) If it is set to *No*, the user will not see the option to *Manage Failed Invoices* in the *Actions* drop down menu when viewing the *Failed Invoice Report*.

Order

These permissions control the ability to view, add, edit & delete order records. These permissions *do not* include access to subscription programs that involve recurring billing.

- **Can view all records**: This permission controls the ability to view individual order details. If it is set to *No*, the user can view a list of orders and will have access to a contact's order history, but will receive an *access denied* message when trying to click into an order to view it.
- **Can edit all records:** This permission controls the ability to edit existing orders. If it is set to *No*, the user can view a list of orders and click into an order to view its details, but will only be able to save changes to the orders they created. If the *Can delete* permission is set to *Yes* the user can still delete orders.
- **Can add all records:** This permission controls the ability to manually create new orders. If it is set to *No*, the user will not see the option to *Add an Order* in the *Orders* menu or click the *Add Order* button when viewing a contact's order history.
- **Can search all records:** This permission controls the ability to search for a list of orders. If it is set to *No*, the user will not see the option to *View Orders* in the *Orders* menu.

- **Can delete**: This permission controls the ability to delete existing order records. If it is set to *No*, the user will not see the *Delete* button when viewing individual order records.
- **Can see order tab on person record**: This permission controls access to the order history for individual contacts. If it is set to *No*, the user will not see the *Orders* tab when viewing a contact record and so will not be able to view, add, edit, or delete orders from there; however, the user may be able to view lists of orders and edit order records from these lists, if the other order permissions allow.

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User Permissions - E-Commerce

Last Modified on 08/02/2018 2:15 pm MST

The E-Commerce settings determine how a user can interact with the features required to set up the online store, manage your product list, or create order forms. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Product

These permissions control the ability to view, add, edit & delete product records, as well as manage specific product functions.

- **Can view all records**: This permission controls access to view individual product details. If it is set to *No*, the user can view the product list, but will receive an *access denied* message when they click on a product link to view the details. In addition, the user will not be able to create product bundle links. If the *Can delete* permission is set to *Yes*, the user will still be able to delete products. If the *Can add* permission is set to *Yes*, the user will still be able to add a new product, but won't be able to access it again after leaving the new product screen.
- **Can edit all records**: This permission controls the ability to change products once they've been created. If it is set to *No*, the user will not see the *Save* button when they click into a product record. In addition, the user will not be able to create product bundle links. If the *can delete* permission is set to *Yes*, the user will still be able to delete products. If the *Can add*, permission is set to *Yes*, the user will still be able to add a new product, but won't be able to fill in any product details after adding it.
- **Can add**: This permission controls the ability to enter new products. If it is set to *No*, the user will receive an *access denied* message when they click on the *Add a Product* button; however, if the user has permission to import contacts, they will be able to import products too.
- **Can search**: This permission controls access to your product list. If it is set to *No*, the user will not see *View Products* or *Product Categories* in the *Product* menu. They will also receive an *access denied* message when they click on the *Products* link under *Product Setup* in the E-Commerce Setup screen.

- **Can delete**: This permission controls the ability to delete a product record. If it is set to *No*, the user will receive an *access denied* message when they try to delete a product from the product list. They will not see the *Delete* option under the *Actions* menu on the product list or the *Delete* button when viewing an individual product.
- **Can use Digital Product merge fields**: This permission controls the ability to create a delivery email that has the product download link, code, and/or key merged into it. If it is set to *No*, the user will not see the digital product merge options when they create an email.
- **Can see encrypted Digital Product keys**: This permission controls the ability to see the digital product keys stored in Infusionsoft. If it is set to *No.*
- **Can track inventory**: This permission controls the ability to increase or decrease product inventory from within a product record, if you've enabled inventory tracking. If it is set to *No*, the user will not see the *Product Inventory* tab when viewing a product record.

Order Form

These permissions control the ability to view, add, edit & delete order forms. Order forms are used to sell a specific product or subscription program.

- **Can view all records**: This permission controls access to view individual order forms. If it is set to *No*, the user can view the order form list, but will receive an *access denied* message when they click on an order form link to view the details.
- **Can edit all records**: This permission controls the ability to edit an order form. If it is set to *No*, the user can view the order form list and click into an order form to view its details. The user will not see the *Save* button required to add or remove fields, change the product, or update any other order form settings. In addition, the user will not be able to clone an existing order form. If the *Can add permission* is set to *Yes*, the user will still be able to create a new order form, but will not be able to edit it after saving the first time.
- **Can add**: This permission controls the ability to create order forms. If it is set to *No*, the user cannot create a new order form. If the *can view permission* is set to *Yes*, the user can still view a list of order forms and see the *Add an Order Form button*; however, the user will not be able to save changes to a form after clicking on it.
- **Can search**: This permission controls the ability to access order forms. If it is set to *No*, the user will see an access denied message when they click on *Order Forms* in the E-Commerce area.

  Can delete: This permission controls the ability to delete order forms. If it is set to *No*, the user will not see *Delete* option in the Actions drop down menu on the order form list or the *Delete* button in an individual order form.

Shopping Cart

Can manage shopping cart: This permission controls the ability to set up the Infusionsoft shopping cart. If it is set to *No*, the user will receive an *access denied* message when they click on the E-Commerce Setup option in the main navigation menu. They will not be able to customize the shopping cart settings or design; however, they can still manage products and order forms using the related options in the E-Commerce area nav.

Please Note! If this is set to *No*, the user will not have access to Promotions .

User Permissions - User

Last Modified on 08/02/2018 2:15 pm MST

The user permissions are related to setting up and managing other Infusionsoft users. These permissions are generally given only to users who help you administer your Infusionsoft system and manage the employees who use your Infusionsoft system. To access these User Permissions, go to **Admin** > **Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view another user's profile information. If it is set to *No*, the user can view the user list, but will receive an *access denied* message when they try to click into a user record. If the *can edit all records* permission is set to *Yes*, it will override this permission and the user is able to view and edit all user records.

Can edit all records

This permission controls the ability to make changes to other users' profile information. If it is set to *No*, the user can view a list of users and click into user records to view profile information, but they will not be able to save any changes. The user will still be able to edit their own user profile.

Can add

This permission controls the ability to set up new user accounts. If it is set to *No*, the user will see an access denied message when they click on *Add Users* when viewing a list of users.

Can search

This permission controls access to users. If it is set to *No*, the user will not see the *User* option in the main navigation menu. The user will not be able do view, add, delete, or edit users in any way, regardless of their other permissions. They will only be able to access their own profile through the toolbar.

Can edit user permissions

This permission controls the ability to edit user permissions. If it is set to *No*, the user will not see the *Edit User Permissions* button when viewing a user profile, and will receive an access denied message when they click on the *Edit Permissions* link when viewing the user list.

Can assign roles

This permission controls the ability to assign users to one of the standard user groups. If it is set to *No*, the user will not see the *User Groups* tab when viewing a user's profile.

Can unlock user accounts

This permission controls the ability to unlock a user's account. User accounts are locked when a user is not able to correctly enter their login information after multiple tries. If this permission is set to *No*, the user will not see the *Unlock* button when viewing a user profile.

Can deactivate user accounts

This permission controls the ability to block other users from accessing the application. If it is set to *No*, the user will not see the *Deactivate* button when viewing a user profile.

Can activate users

This permission controls the ability to restore a user's access to the application. If it is set to *No*, the user will not see the *Activate* button when viewing a user profile.

Can resend user invitations

This permission controls the ability to resend the account setup invitation to users who don't respond right away. If it is set to *No*, the user will not see the *resend invitation* link when viewing the user list or the *Resend* button in a user profile.

Can manage user teams

This permission controls the ability to create custom user teams. If it is set to *No*, the user will not see the Teams option under **CRM > Settings**.

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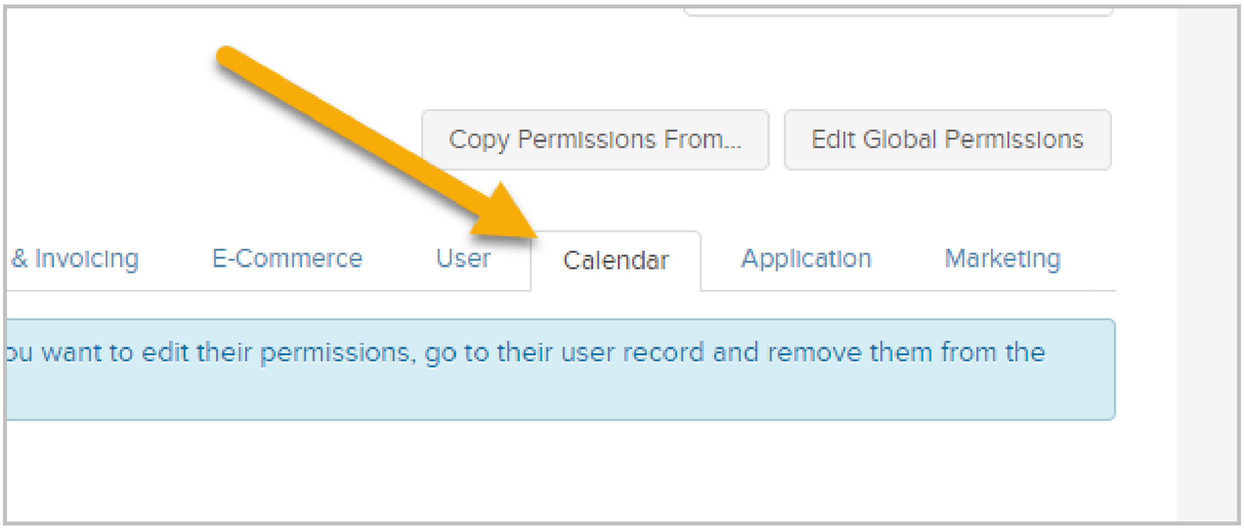
User Permissions - Calendar

Last Modified on 08/24/2018 4:13 pm MST

The Calendar permissions determine the ability to view and use the Infusionsoft calendaring tools to schedule appointments and create tasks. An admin can change these permissions by going to **Admin > Users** and clicking the **Edit Permissions** link next to the user name.

Task / Appointments / Note



These permissions control the ability to view, add, edit and delete tasks, appointments and notes.

- **Can view all records:** This permission controls the ability to view the tasks, appointments, and notes assigned to other users. If it is set to *No*, the user can only see the summary view of the tasks, appointments, or notes assigned to others. They will receive an *access denied* message if they click on the link to view the details.
- **Can edit all records:** This permission controls the ability to update the tasks, appointments, and notes assigned to other users. If it is set to *No*, the user can click on the detail link to view additional information, but will not see the *Save* button. If the *can delete permission* is set to *Yes*, the user will still be able to delete items assigned to other users. If the *can add permission* is set to *Yes*, the user will still be able to add a new task, appointment or note for another user, but will not be able to edit it after saving it the first time.

- **Can add**: This permission controls the ability to create new tasks, appointments, or notes. If it is set to *No*, the user will not see the option to add these items or will receive an *access denied* message when trying to create one of them through the calendar screen.
- **Can search**: This permission controls the ability to view the general task list from the user toolbar. If it is set to *No*, the user will not see the *Task* menu option listed.
- **Can delete**: This permission controls the ability to delete tasks, appointments, and notes. If it is set to *No*, the user will not see the *Delete* option in the *Actions* drop down menu or the *Delete* button when viewing individual records.
- **Can assign tasks**: This permission controls the ability to assign a task, appointment, or note to other users. If it is set to *No*, the user can add and edit appointments, but cannot assign them to other users or reassign them after they are created.
- **Can view unassigned records**: This permission controls the ability to view tasks, appointments, and notes that are not assigned to any user. You may need to assign a user to monitor unassigned records. If it is set to *No*, the user will not be able to see the details for any unassigned items.
- **Can edit unassigned records**: This permission controls the ability to update tasks, appointments, and notes that are not assigned to any user. If it is set to *No*, the user will not be able to save changes to unassigned records; which means they cannot assign a users to them.

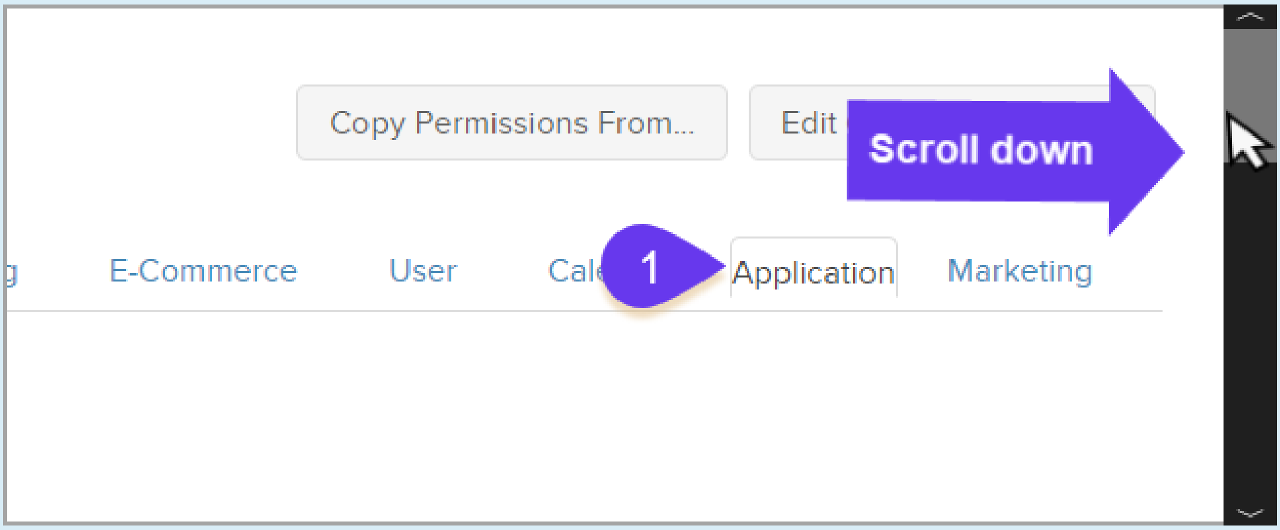
Email

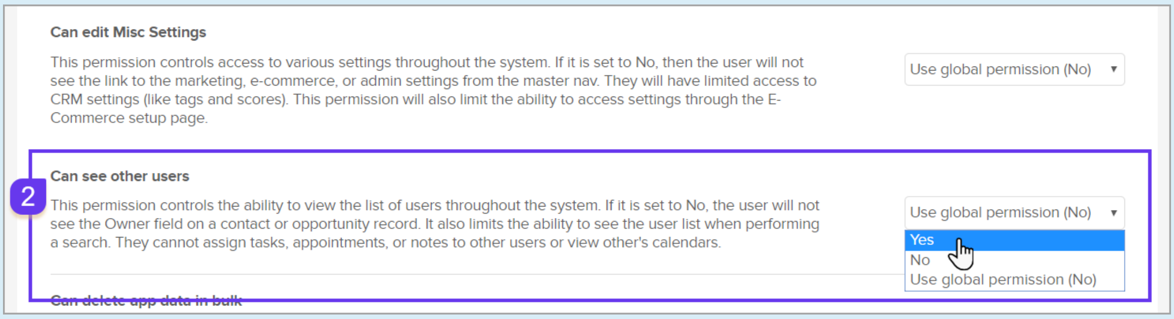
Can create shared POP accounts: This permission controls the ability to share a POP email account. If it is set to *No*, the user can set up a new POP account but cannot share it with other users. The list of users will be hidden from view.

Calendar

Can view calendar for {user}: This permission restricts the ability to view another user's calendar. If it is set to *No*, the user will not be able to view the calendar for the specified user. There is a permission for each user. If the permission is set to *Yes*, the user will be able to select and view that user's Infusionsoft calendar.

Pro Tip! To see other Users **Tasks/Calendar** you must also go to "**Application Tab**" and change "**Can see other Users**" to "**yes**", if it's not already indicated.





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User Permissions - Application

Last Modified on 08/02/2018 2:18 pm MST

These user permissions are related to the administration of Infusionsoft.

Application

These permissions control the ability to access various "account level" functions that are not associated with one particular component of Infusionsoft.

- **Can add tag**: This permission controls the ability to create and use tags throughout the application. If it is set to No, the user will not able to create new tags in the system. They also cannot see the Tag tab or the Edit Tags button when viewing a contact record. They will not be able to apply tags to contacts and can only remove tags from a contact record using the Tags option in the interactive panel. They will be able to use the tag objects in the campaign builder and set up actions to apply / remove tags, if their marketing permissions allow access to these features.
- **Can see app account management page**: This permission controls the ability to access the Infusionsoft account page in the Admin area of the main navigation menu. This page provides summary account usage information and allows you to upgrade your account, manage billing, and purchase plug-ins or services. If it is set to *No*, the user will not see the *Infusionsoft Account* option in the main menu.
- **Can go to billing info management page**: This permission controls the ability to view the billing summary on the *Infusionsoft Account* page. If it is set to *No*, the user will be able to access the account page to upgrade and purchase add-on products or services; however, they will not see the next bill date or be able to log into the customer center to update the credit card on file.
- **Can import records**: This permission controls a user's ability to upload a spreadsheet of records into Infusionsoft (e.g., contacts, products, tags, etc...) If it is set to *No*, the user will not see the *Import Contacts* option in the *Contacts* menu and will receive an *access denied* message if they try an update import (Modify Existing Records) through **Admin > Data Cleanup**.

- **Can dup check and merge records**: This permission controls a user's ability to run the automated duplicate checking process and merge the duplicate contact records. If it is set to *No* the user will not see the *Data Cleanup* option in the main navigation menu.
- **Can rollback imports**: This permission controls a user's ability to delete (rollback) an entire import. If it is set to *No* the user can view previous imports (if *can import* is set to *Yes*), but cannot see the link required to rollback the import.
- **Can view company files**: This permission controls the ability to access the application file box from the user toolbar. They will receive an *access denied* message if they select the *Files* option from the *Home* icon on the toolbar. The user is still able to add files to contact file boxes.
- **Can delete company files**: This permission controls the ability to delete files from the application file box. If it is set to No, the user can view the company files but cannot delete them.
- **Can export lists**: This permission controls the ability to export any kind of data (e.g., contacts, orders, etc...) from your system. If it is set to No, the user will not see the Export option on any of the Action menus throughout the system.
- **Can edit Misc. Settings**: This permission controls access to various settings throughout the system. If it is set to No, then the user will not see the link to the marketing, e-commerce, or admin settings from the master nav. They will have limited access to CRM settings (like tags and scores). This permission will also limit the ability to access settings through the E-Commerce setup page.
- **Can see other users**: This permission controls the ability to view the list of users throughout the system. If it is set to *No*, the user will not see the *Owner* field on a contact or opportunity record. It also limits the ability to see the user list when performing a search. They cannot assign tasks, appointments, or notes to other users or view other's calendars.
- **Can delete app data in bulk**: This permission restricts a user's ability to batch-delete various records throughout the system. If it is set to *No*, the user will not see the *Delete* option in the *Actions* drop down menus.
- **Can change field data in bulk**: This permission controls a user's ability to mass update various records throughout the system. If it is set to *No*, the user will not see the *mass update* options in the *Actions* drop down menus throughout the system (e.g., mass update contacts, opportunities, referral partners, etc.)
- **Can add items to the top nav**: This permission controls a user's ability to add custom menu items to the area dropdown navigation (e.g., add a custom search to the Contacts menu within the CRM area). If it is set to *No*, the user will not see the *Main Nav* menu option under **Admin** > **Settings**.
- **Can reveal credit card data**: This permission controls a user's ability to view stored credit card data. If it is set to *No*, the user is not able to see the *View Secure Credit Card Info* link when managing a customer's credit card information.
- **Can Manage Scores**: This permission controls the ability to set up scoring criteria. If it is

set to *No*, the user is not able to see the *Scores* menu option under **CRM > Settings**.

Action

These permissions control the ability to set up, use, or manage action sets.

- **Can apply actions:** This controls the ability to run actions on a list of contacts or an individual contact or opportunity record. If it is set to *No*, the user will not see the *Apply Action Set* option in the *Actions* drop down menus throughout the system or the *Apply Actions* option on the contact actions list. They also will not see the *Actions* drop-downs when setting up web forms, order forms, etc...
- **Can see all action sets**: This permission controls the ability to view the list of all existing action sets. If it is set to *No*, the user will receive an *access denied* message when trying to access *Action Sets* through **CRM > Settings or Marketing > Settings**.
- **Can share action sets**: This permission controls the ability to share a new action set created through the *Action Set* settings screen with other users. If it is set to *No*, the user will not see the *Visible To* tab when creating a new action set through **CRM > Settings** or **Marketing > Settings**. Action sets are visible to all users by default. The visibility filter allows users to hide action sets for users so they will not see them when applying actions, copying actions, or running another action set.
- **Can change priority of scheduled actions**: This permission controls the ability to rearrange actions through the *Scheduled Actions* admin report. If it is set to *No*, the user will not be able to re-prioritize the actions.

Reports

These permissions control access to reports by system area. If any of these permissions are set to *Yes*, the related report menu options are visible in the main navigation menu. If it is set to *No*, the user will not see the menu option to the related reports:

- Can view Marketing Reports
- Can view Sales Reports
- Can view Order Reports
- Can view Affiliate Reports
- Can view Administrative Reports

Fulfillment

This permission only applies to the legacy *Day* or *Agenda* home page views. It does not apply to the customizable User Dashboard.

Can see all fulfillment jobs: If this permission is set to *Yes* the user is able to see the queued fulfillment and order fulfillment jobs assigned to all users. If it is set to *No*, the user will only see their own jobs.

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User Permissions - Marketing

Last Modified on 08/02/2018 2:18 pm MST

The marketing permissions determine how a user can interact with the campaign builder, broadcast emails, lead sources and the legacy marketing features.

Campaign (Legacy)

These permissions controls the ability to view, add, edit, & delete a legacy marketing Campaign. If you do not already have legacy campaigns created, then we recommend you set all of these permissions to *No* and use the new campaign builder instead.

- **Can edit all records**: This permission controls the ability to edit existing legacy campaigns. If it is set to *No*, the user can view a list of legacy campaigns**Marketing** > **Legacy** > **View Campaigns**, but will see an *access denied* message if they try to click on a campaign link to view or edit the campaign details.
- **Can add**: This permission controls the ability to create a new legacy campaign. If it is set to *No*, the user will not see the option to *Add a Campaign (Legacy)* in the *Legacy* menu or the *Add a Campaign* button when viewing a list of legacy campaigns.
- **Can search**: This permission controls the ability to view a list of legacy campaigns. If it is set to *No*, the user will be able to add a new campaign, but won't be able to view it after it is created. The option to *View Campaigns* will not show up in the Legacy menu.
- **Can delete**: This permission controls the ability to delete legacy campaigns. If it is set to *No*, the user will not see the option to *Delete Campaigns* in the *Actions* drop down menu.

Email

These permissions control the ability to send batch emails to lists of contacts.

Can send broadcasts: This permission controls the ability to send Broadcast messages (email, voice broadcasts, letters, etc.) If it is set to *No*, the user will not see the *Broadcast* option in the main navigation menu. You should make sure you train users on email marketing best practices before setting these permissions to *Yes*.

Follow-Up Sequences (legacy)

These permissions control a user's ability to view, add, edit & delete legacy Follow-Up Sequences.

- **Can view all records**: This permission controls the ability to view the follow-up sequence details. If it is set to *No*, the user can view the list of follow-up sequences, but will receive an *access denied* message when they click on a link to view the sequence details. They will not be able to view or edit existing legacy follow-up sequences; however, if the *Can add permission* is set to *Yes*, they will still be able to add new legacy follow-up sequences.
- **Can edit all records:** This permission controls the ability to add or edit follow-up sequence steps. If it is set to *No*, the user is able to view the list of sequences and view the sequence details, but when viewing the sequence will not see the drop-down menu for adding new steps or links to edit existing steps.
- **Can add**: This permission controls the ability to add new legacy follow-up sequences. If it is set to *No*, the user will not see the option to *Add* or *Copy* a Follow-up Sequence in the Legacy menu or the *Add a Follow-up Sequence* button when viewing the follow-up sequence list.
- **Can search**: This permission controls the ability to view a list of existing follow-up sequences. If it is set to *No*, the user will not see the option to *View Follow-up Sequences* in the Legacy menu.
- **Can delete**: This permission controls the ability to delete follow-up sequences. If it is set to *No*, the user will not see the *Delete* option in the *Actions* menu drop down when viewing a list of follow-up sequences or the *Delete* button under the *Options* tab when viewing an individual sequence.
- **Can add/remove from follow-up sequence**: This permission controls the ability to manage follow-up sequences for individual contacts. If it is set to *No*, the user will not see the *Follow-up Sequence* tab in the second row of tabs in a contact record or the *Start/Stop a Follow-up Sequence* option in the *Actions* drop down menu when viewing list of contacts.
- **Can override follow-up sequence response defaults**: This permission controls the ability to add a contact to a new follow-up sequence when manually tracking a response in a contact record.

Campaign

These permissions control the ability to use the Campaign Builder.

- **Can edit all records:** This permission controls the ability to edit existing campaigns. If it is set to *No*, the user is able to view the list of campaigns, but will receive an *access denied* message when they click on a link to view campaign details and when they try to add a new campaign.
- **Can add**: This permission controls the ability to add new campaigns using the campaign builder. If it is set to *No*, the user will not see the option to *Add a Campaign* in the Campaign Builder menu or the *Add a Campaign* button when viewing a list of existing campaigns. The user will be able to edit existing campaigns.
- **Can search**: This permission controls the ability to view existing campaigns. If it is set to *No*, the user will not see the option to *View Campaigns* in the Campaign Builder menu. If the *Can add permission* is set to *Yes*, the user is still able to add campaigns, but will not be able to navigate back to them after leaving the campaign builder.
- **Can delete**: This permission controls the ability to delete campaigns. If it is set to *No*, the user will not see the option to *Un-publish and Delete* in the *Actions* drop down menu when viewing a list of campaigns.
- **Can add/remove from campaign**: This permission controls the ability to manage campaign sequences for a list of contacts. If it is set to *No*, the user will not see the option to *Start / Stop a Campaign Sequence* in the *Actions* drop down menu when viewing a list of contacts and will not have access to the *Campaigns* tab when viewing a contact record.

Lead Source

These permissions control the ability to view, add, edit, & delete Lead Sources. Lead sources are used to track advertising efforts and their ability to generate qualified prospects.

- **Can view all records**: This permission controls access to Lead Source records under *Marketing Settings*. If it is set to *No*, the user is able to view a list of lead sources, but receives an *access denied* message when they click on a link to view a lead source's details.
- **Can edit all records:** This permission controls the ability to change a lead source. If it is set to *No*, the user is able to click into individual lead sources and view the details, but will not see the *Save* button and so cannot edit the lead source details.
- **Can add**: This permission controls the ability to add a new lead source. If it is set to *No*, the user will not see the *Add a Lead Source* button when viewing a list of lead sources. If the *Can edit all records* permission is set to *Yes*, the user will still be able to view and edit existing lead sources.

- **Can search**: This permission controls the ability to view existing lead sources. If it is set to *No*, the user will receive an *access denied* message when they click on *Lead Sources* in the marketing settings menu. The user is not able to add, view, or edit lead sources if this permission is set to *No*.
- **Can delete**: This permission controls the ability to delete lead sources. If it is set to *No*, the user will not see the *Set as Active* or *Set as Inactive* options in the *Actions* drop down menu when viewing the lead source list or the *Delete* button when viewing an individual lead source.

Web Form (legacy)

These permissions control the ability to view, add, edit, & delete legacy Web Forms. The Web Forms are used to add new contacts and/or update existing ones. These permissions do not apply to the web forms created through the campaign builder.

- **Can view all records**: This permission controls the ability to view individual web forms. If it is set to *No*, the user can view the list of legacy web forms, but will receive an*access denied* message when they click on a link to view an individual form. They will not be able to view or edit existing legacy web forms; however, if the *Can add permission* is set to *Yes*, they will still be able to add a new legacy form.
- **Can edit all records**: This permission controls the ability to modify the form fields on a legacy web form or change the thank-you page settings. If it is set to *No*, the user is able to view the list of legacy forms and click into an individual web form; however, they will not see the *Edit Web Form* or *Save* buttons. The user will still be able to add actions to the form, but won't be able to save any other changes.
- **Can add**: This permission controls the ability to add new legacy web forms. If it is set to *No*, the user will not see the option to *Add a Web Form* in the Legacy menu or the *Add a Web Form* button when viewing the legacy web form list.
- **Can search**: This permission controls the ability to view web forms. If it is set to*No*, the user will not see the option to *View Web Forms* in the Legacy menu. If the *Can add permission* is set to *Yes*, the user is still able to add legacy web forms, but will not be able to navigate back to them after leaving the page.
- **Can delete**: This permission controls the ability to delete web forms. If it is set to*No*, the user will not see the *Delete* options in the *Actions* drop down menu when viewing the legacy form list or the *Delete this web form* link when viewing an individual web form.

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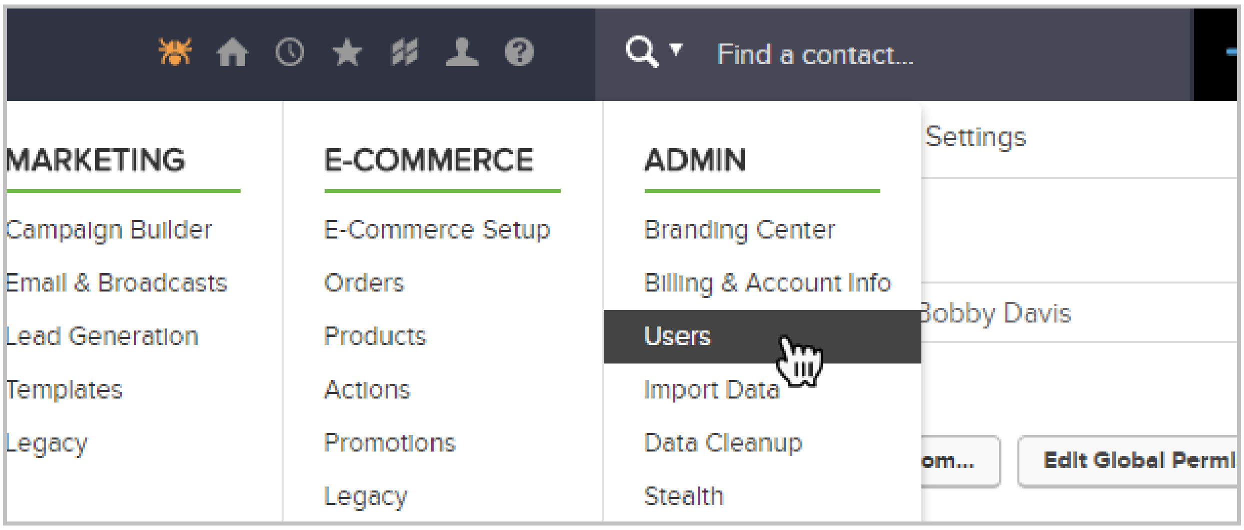
Permission To Access DKIM Settings

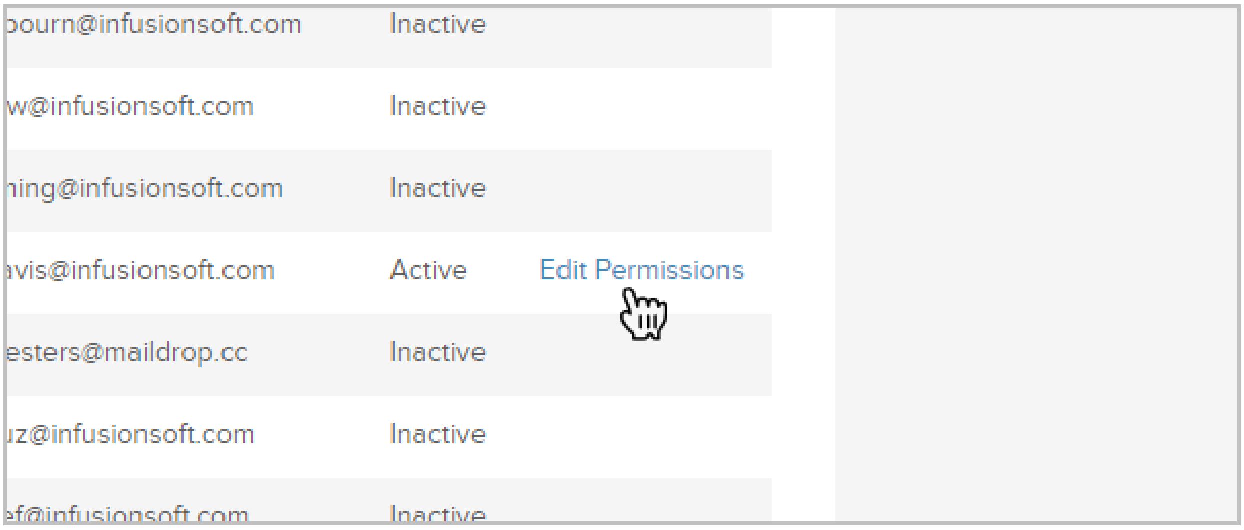
Last Modified on 08/02/2018 2:19 pm MST

You can now permit a non-admin user (such as an Infusionsoft Certified Partner) to modify DKIM settings in your Infusionsoft account.

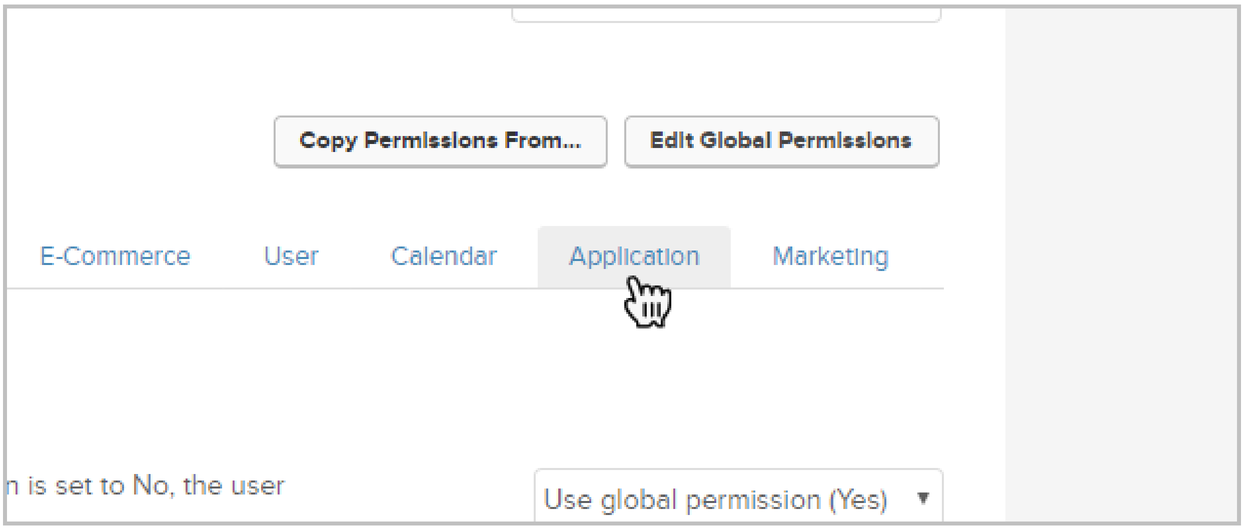
1. Navigate to **Users** in the **Admin** section of the main menu



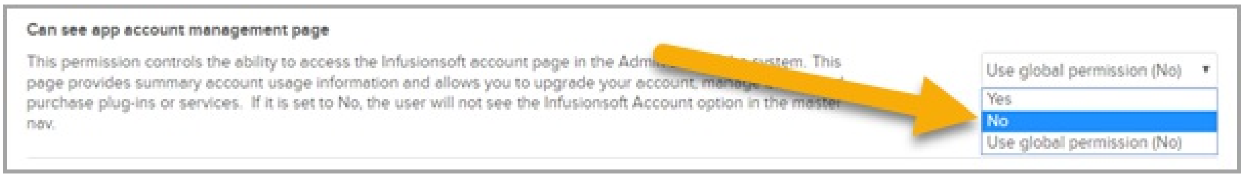
2. Click the **Edit Permissions** link to the right of a non-admin user that you wish to grant access to DKIM settings



3. Click on the **Application** tab within the permissions view



4. Scroll down to the **Can see app account management** page and change the permission to **No**



5. Scroll down to the **Can edit Misc Settings** permission and change the permission to **Yes**

6. To simulate full admin permissions for the non-admin user, be sure to set all other settings to **Yes**. This simulates full admin rights and excludes Billing & Account Info information that is private to the partner admin user. Non-admin users will now be able to access settings underneath the Marketing section of the main navigation menu to setup DKIM, while not exposing billing information found under Billing & Account Info

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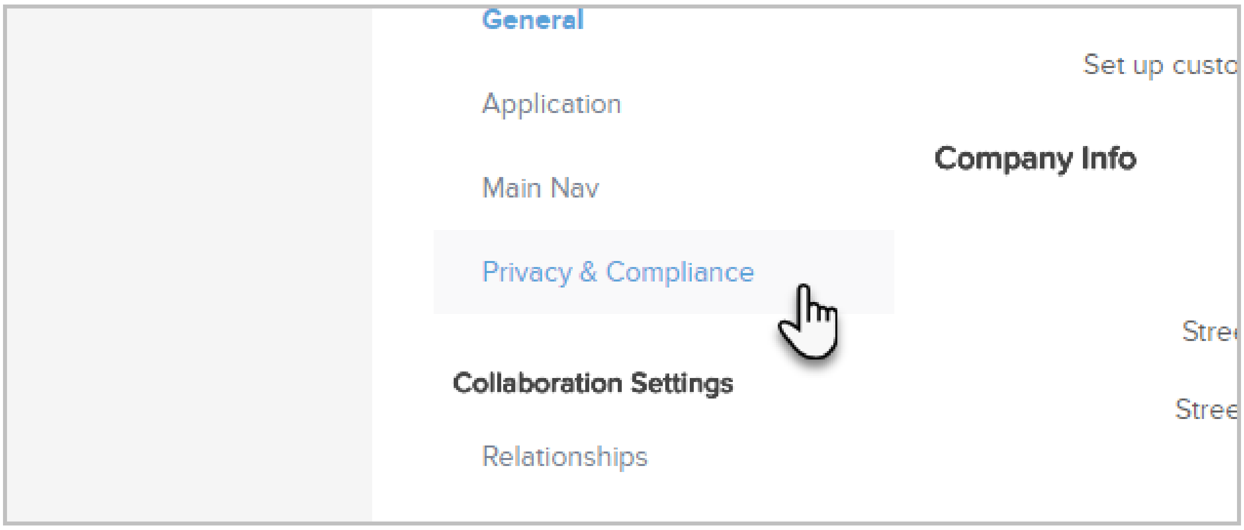
GDPR Settings

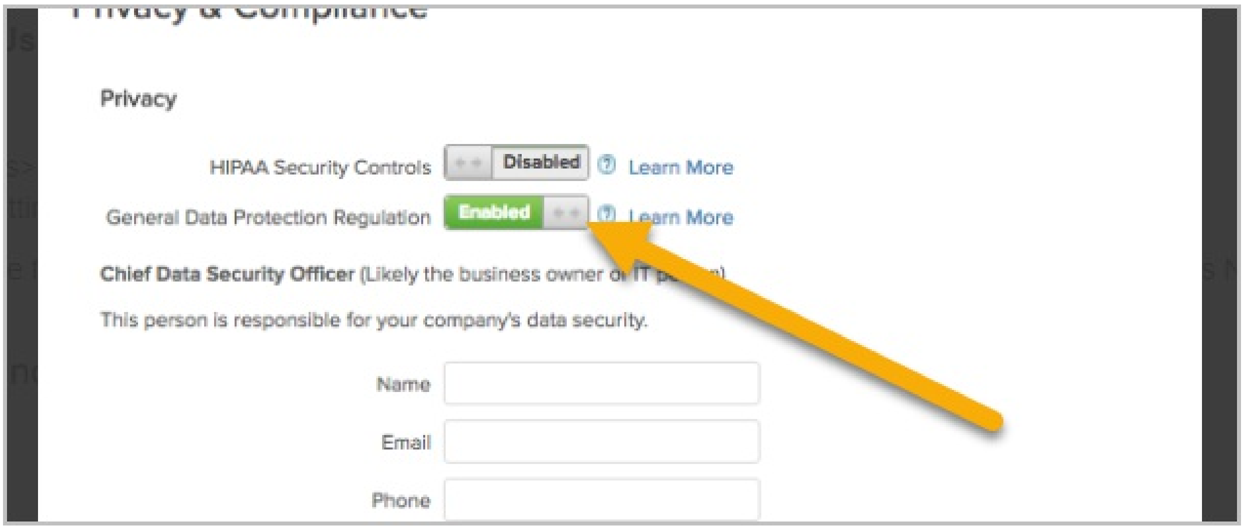
Last Modified on 08/02/2018 2:19 pm MST

We've added a section for you to enter your GDPR information as well as view and accept our updated data policy. Enabling GDPR gives you access to special tools that will help you manage persona data.

1. Go to **Admin> Settings> Privacy and Compliance**

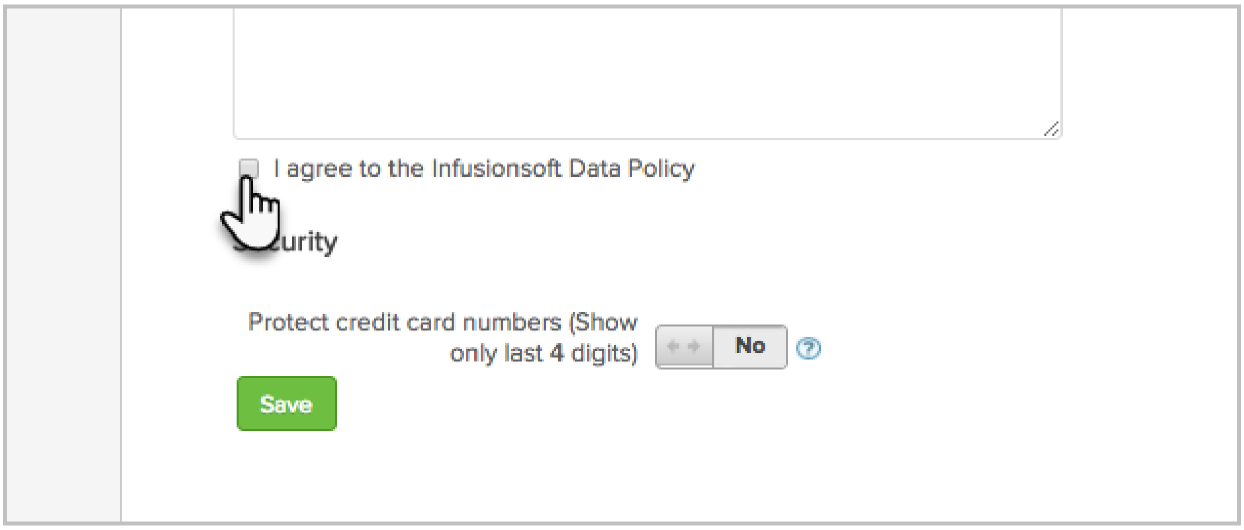


2. Toggle the **General Protection Data Regulation** on



3. All fields need to be filled-out (Address 2 is optional)

4. Check the box to agree to the updated Infusionsoft Data Policy



5. Click **Save**

6. You will now have access to GDPR Tools. Click here to see them in action.

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GDPR FAQ

Last Modified on 08/02/2018 2:20 pm MST

Overview

What is the General Data Protection Regulation (GDPR)?

The GDPR is the European Union's new, comprehensive privacy and data protection law that will take effect on May 25, 2018. The primary aim of the GDPR is to regulate how the personal data of EU residents is processed – even by businesses that have no physical or legal presence in the EU. Organizations can face hefty fines for non-compliance: up to €20 million or 4 percent of annual global revenue, whichever is higher.

Take a look at our GDPR Readiness Guide to learn more.

Is Infusionsoft GDPR certified?

There is not yet any kind of recognized GDPR certification scheme. We're taking the necessary steps to ensure that we're in compliance with the GDPR in advance of the implementation date of the new law.

We now offer you (customers and Partners) a new Data Processing Addendum (DPA) inside of your account. Signing the DPA amends our standard terms of service to reflect obligations required under the GDPR. This is the instrument that you can rely on to have certainty that we will comply with the GDPR when it comes into effect on May 25, 2018. It amounts to a guarantee that we will be GDPR compliant.

How can Infusionsoft guarantee I will be able to use my account after the GDPR comes into effect?

We will offer a new Data Processing Addendum, that will replace our prior DPA. The new DPA isn't dramatically different from our old DPA, but it does address all of the GDPR-specific concepts. For reference, the old DPA is available here: https://www.infusionsoft.com/legal/dpa.

The new DPA will govern the terms by which we, as a data processor, processes data on behalf of you, our customers, (who are typically data controllers) in accordance with Article 28 of the GDPR .

According to Article 28 of the GDPR, data processors must act only upon the documented instructions of the data controller unless otherwise required by law. This, however, does not relieve us of any of our obligations or liabilities under the GDPR. We will be required to ensure that we're in compliance with the GDPR.

What is Infusionsoft doing to ensure that it (and its vendors) are compliant with the GDPR?

We're currently re-papering vendor contracts and working with vendors to ensure they're compliant by adding a settings pane for you (our customers) to provide us with the information required under Article 30(2) of the GDPR.

We'll continue to review our security measures, as we always do, to stay at the forefront of evolving industry standards and best practices.

We have appointed a representative in the EU and an expert Data Protection Officer and are in the process of delivering a new Data Processing Addendum, all of which will ensure we're satisfying the subcontracting obligations of a data processor under the law.

GDPR and You

So Infusionsoft will be compliant with the GDPR. Does that mean that I'm automatically compliant too? If not, where can I learn more about my own obligations?

No, while we've done our best to make it easier for you to be compliant, you'll still need to address your own practices regarding GDPR compliance. See more in our GDPR Readiness Guide .

Much of how you collect, use, and dispose of personal data is not determined by your data processor (that's us). Thus, each organization should get its own professional guidance on the topic to help ensure compliance. In addition to our Readiness Guide, here's an additional resource from the UK Information Commissioner's Office: https://ico.org.uk/for-organisations/resources-and-support/data-protection-self-assessment/getting-ready-for-the-gdpr/.

Is Infusionsoft building new software features to help me comply with the GDPR?

Yes, we're releasing new features to help users manage their compliance with a number of key pain points in the law. This includes a set of features to help you manage the basis of processing (such as consent management) for your contacts, to make it easy to anonymize personal data (i.e., the right to be forgotten), and a customizable "block list" feature to help ensure that if someone asks you to never process their personal data, that their personal data can't be re-imported into your account. These features will help you to comply with many of your fundamental obligations under the GDPR.

Am I a data controller? Is Infusionsoft a data processor?

Typically, you (the Infusionsoft customer) will be considered as a data controller (i.e., an organization that determines the purposes and means of the processing of personal data) and we will always be considered a data processor under the law.

Controllers and processors each have their own respective obligations under the law. Therefore, our GDPR compliance plan looks a bit different from what yours will look like. This doesn't mean we can't be used by data controllers – quite the opposite. When a data controller engages a service provider like ours, the service provider is typically a data processor acting on behalf of the controller, and the processor acts at the behest of the controller. As stated below, our DPA will govern the relationship, and the nature of the processing activities, as between Infusionsoft and its customers, regardless of which entity plays which role.

What is considered personal data?

According to GDPR Article 4 , personal data means…"any information relating to an identified or identifiable natural person ('data subject'); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person."

So what does that mean for you?

Within your Infusionsoft account, that would include their contact information. And they may at some point ask you to forget them, or modify their information to be accurate, etc. You would then be responsible for fulfilling that request.

Does the GDPR require an additional checkbox to be able to lawfully process personal data? Or will a sentence such as "enter your information for us to email you XYZ Pdf" be sufficient?

If you are processing personal data on the basis of the data subject's consent, you will need to include a mechanism to collect that consent, which could include an unticked checkbox which the data subject can tick to consent to the processing of his or her data. If you can consider this type of arrangement as a "contract" between you and the individual who requested the "something," then you may be able to skip the checkbox altogether, and base your processing on the need to perform your obligations under this "contract". See the Lawful Processing section in the GDPR Readiness Guide.

If as customer asks me to exercise their Right to be Forgotten, do I have to remove them from my database?

Yes. Article 17 of the GDPR sets out the data subject's right to have his or her data erased (also known as the "right to be forgotten") when certain (broad) grounds apply, such as (without limitation) when the personal data are no longer necessary for the purposes of processing, where consent, as the sole basis of processing, has been withdrawn, or where the data subject has objected to the processing of his or her personal data and you have no "compelling legitimate grounds" to continue the processing. It's important to note how broadly this right applies: in practice, there will be few circumstances where the GDPR will not require the deletion of data at the data subject's request.

Read more about the Right to be Forgotten in our GDPR Readiness Guide. See the Right to Erasure in the GDPR Readiness Guide

What if I offer services free of charge (e.g. regularly emailing cat photos to my subscribed customers without requiring them to pay)? Does this constitute a contract and can this be considered as a legal basis for lawful processing of personal data?

Yes. The GDPR is not limited to situations where money is transferred. According to Article 3.2(a) of the GDPR, merely offering goods or services to EU data subjects, even without payment, makes that transaction regulated by the GDPR. By using your services for which no payment is required, your customers typically agree to the Terms of Use/Terms of Service that you display on the website, thus forming a valid contract. You can use this as a legal basis for justifying the processing of personal data, simply because it is necessary for fulfilling your obligations under the contract. Without knowing your customers' email, how else would you be able to share cat photos with them? Read more about the Lawfulness of Processing in our GDPR Readiness Guide.

If I have an EU Representative based in the United Kingdom (UK). Will that still work (after Brexit)?

No. Post-Brexit, a representative located in the UK will no longer lawfully be considered a representative in the EU, within the meaning of Article 27 of the GDPR. With that being said, it's important to remember the UK will remain a Member State of the EU until the date of its formal withdrawal on March 29, 2019. From May 25, 2018 until March 29, 2019, the GDPR will have full force and effect in the UK.

Consent

Do I need to obtain consent again from all my contacts?

Not necessarily. There are other permitted bases for processing personal data underArticle 6 of the GDPR, such as the need to process personal data for the performance of a contract, or the legitimate interests of the data controller or another party. However, if you will be processing personal data based solely on the consent of the individual, you likely need to re-acquire consent from these "old" contacts. For more information on this topic, take a look at the Consent section of our GDPR Readiness Guide.

Under GDPR, can I still have my opt-in forms checked by default?

No, please note that the use of pre-ticked opt-in boxes is not valid under the GDPR. Silence or inactivity on the part of the data subject, as well as merely using a service (without first ticking a box to indicate agreement) doesn't count as "consent".

What is considered legal processing of customer data?

The categories or basis of processing are the following:

1. consent of the data subject;
2. processing is necessary for the performance of a contract to which the data subject is party, or in order to take steps at the request of the data subject prior to entering into a contract;
3. processing is necessary for compliance with a legal obligation to which the controller is subject;
4. processing is necessary in order to protect the vital interests of the data subject or of another natural person;
5. processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller;
6. processing is necessary for the purposes of the legitimate interests pursued by the controller or by a third party, except where such interests are overridden by the interests or fundamental rights and freedoms of the data subject which require protection of personal data, in particular where the data subject is a child.

Check out this blog post on the issue: https://www.infusionsoft.com/product-blog/gdpr-article-6

Data Protection

Who is Infusionsoft's Data Protection Officer (DPO)?

Our DPO is: Matthew Joseph, CIPP/US
Email address: dpo@infusionsoft.com

In accordance with Article 38 of the GDPR, members of the public may contact the DPO with regard to issues related to processing of their personal data and to exercise their rights under the GDPR – for example, to object to the processing of their data in cases where the data controller (that's you, the Infusionsoft customer) does not provide an adequate response.

Who is Infusionsoft’s representative in the European Union pursuant to Article 27 of the GDPR?

Our Article 27 Representatives are:

Matthew Joseph, CIPP/US
Zahradníčkova 1220/20A
Prague 150 00
Czech Republic
Email: Matt@verasafe.com

VeraSafe Ireland LTD
Unit 3D North Point House
North Point Business Park
New Mallow Road
Cork 123AT2P
Ireland
Email: experts@verasafe.com

In accordance with Article 27 of the GDPR, supervisory authorities and persons whose personal data are being processed by us, Infusionsoft, may contact VeraSafe (our Article 27 Representative) on all issues related to processing, for the purposes of ensuring compliance with the GDPR.

If a business is marketing to people in the EU, do they need to have an EU Representative?

Yes. If you are offering goods and services to people in the EU, for free or for a fee, and thus processing their data, in most cases, you will need to appoint an EU representative, as required by Article 27 of the GDPR. For example, our GDPR Article 27 representative in Europe is VeraSafe Ireland Ltd .

What solution does Infusionsoft offer for cross-border data transfers?

Under the GDPR, personal data may only be transferred outside the European Economic Area (commonly referred to as the EEA and which consists of the EU, plus Norway, Iceland, and Liechtenstein) in certain circumstances, such as to a country whose data protection laws are deemed "adequate" by the European Commission, or by relying on an approved data transfer mechanism.

Because we're outside of the EU, we currently offer customers the EU Model Contract (the alternative to Privacy Shield, which comes from the EU and is provided by the FTC) to enable the lawful flow of personal data from the EEA to Infusionsoft in the United States.

The EU Model Contract contains standard contractual clauses which are approved by the European Commission, and which govern the lawful transfer of data from the EEA to countries outside of the EEA. Under the GDPR, additional legitimate methods of exporting personal data outside the EEA may be introduced. In the event of any changes to or new rules associated with the GDPR, Infusionsoft will review and respond appropriately.

What security controls has Infusionsoft implemented to safeguard my data?

Our Data Security Statement goes well beyond the customary confidentiality clauses found in the business terms of many SaaS providers. The statement describes some of the specific data security controls that we've implemented and, by publishing the information, legally obligates us to maintain the high standard of data security that's described in the Statement.

The Data Security Statement can be found here: https://www.infusionsoft.com/legal/data-security

Is Infusionsoft PCI Compliant?

We adhere to, and are audited annually for compliance with, the Payment Card Industry Data Security Standard, which is a rigorous data protection framework oriented towards the protection of payment card data.

Our most recent PCI DSS audit documentation is available upon request. Please contact pci@infusionsoft.com if you require the documentation.

GDPR and Other Channels

How does the GDPR apply to social media?

The GDPR applies to personal data processed for the purposes of social media marketing campaigns, communication with customers via social media, and using Facebook tracking pixels and similar technologies. However, the specific impact depends on the manner in which the social media is used. Social media isn't specifically discussed in the GDPR, so there are no aspects of the GDPR that are unique to social media or social media marketing.

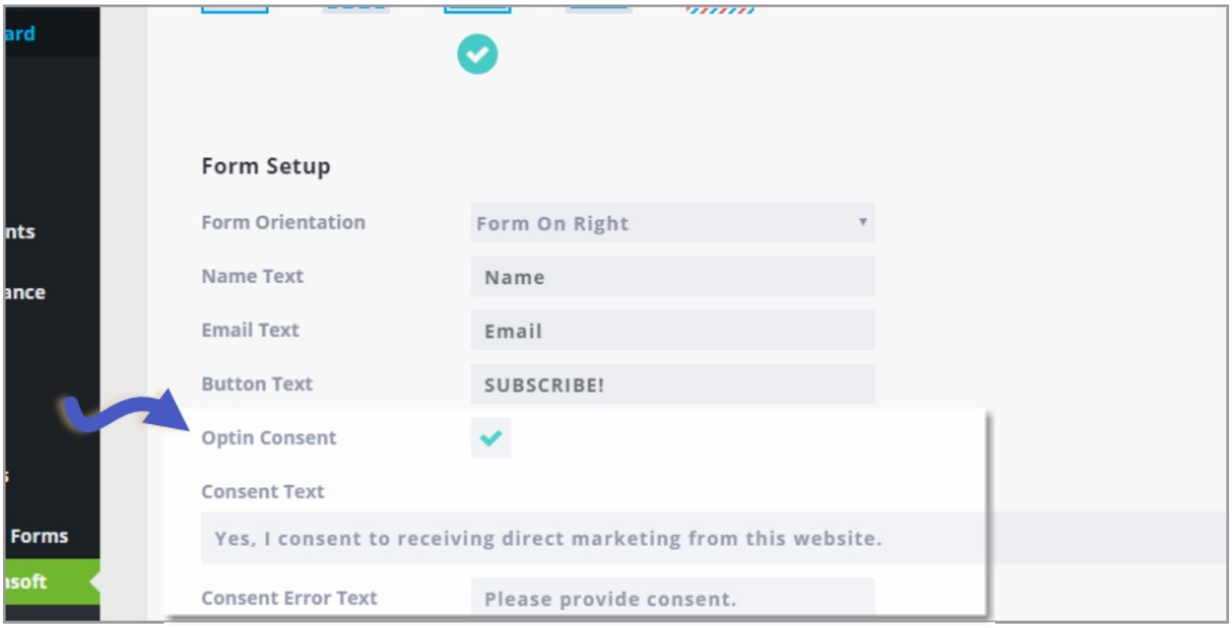
Does the GDPR apply only if a customer buys something from a website?

If you are offering services to a data subject in the EU, they do not necessarily need to buy something from you in order for the GDPR to apply. When you go out of your way to offer goods or services to the people in the EU, the GDPR likely applies to you.

In terms of vendors, how does this apply with third-party integrations with Infusionsoft? If Infusionsoft is GDPR compliant but a third-party software is used (i.e. Zapier, Parsey or anything else), that 3rd party technically has access to the contact record information.

When you configure your Infusionsoft service to connect with those third-party apps, you should ensure that those vendors are also GDPR compliant, and that your relationship with that vendor meets the requirements laid out in Article 28 of the GDPR. For example, the service agreement in place between your company and the third-party service provider should impose various obligations on that service provider, such as a requirement to use the personal data only upon your instructions, and to notify you of any data breaches.

Wordpress Optin Example


ard
nts
ance
Forms
soft
Form Setup
Form Orientation
Form On Right
Name Text
Name
Email Text
Email
Button Text
SUBSCRIBE!
Optin Consent
Consent Text
Yes, I consent to receiving direct marketing from this website.
Consent Error Text
Please provide consent.

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GDPR Anonymize a Contact

Last Modified on 08/02/2018 2:21 pm MST

According to GDPR, a person residing in the EU may choose to exercise their "Right to Erasure" (also known as "Right to be Forgotten.)

IMPORTANT NOTE! This request can be performed at your discretion, especially if this person has outstanding business obligations, like an unpaid invoice. Make sure to look at the contact record before processing the request. Also, don't simply "delete" the contact record! The Redact feature allows you to retain the communication and sales history of the contact and prevents you from accidentally loading that contact record back into Infusionsoft at a later date.

- Erasing (Redacting) a contact anonymizes the contact record, but retains the communication and sales history that you may need for business purposes. The anonymized contact record still exists in Infusionsoft, all history (campaigns, orders, etc...) remain intact, but all personal data is obfuscated. In short, you will no longer be able to tie the history of events to any specific person. Redacting a contact also adds the record to a blacklist so that you don't accidentally load the record back into Infusionsoft at a later date.
- Deleting a contact removes the contact record and all files associated with the record entirely. Also, deleting a contact does not blacklist the record to protect you from accidentally adding it later.

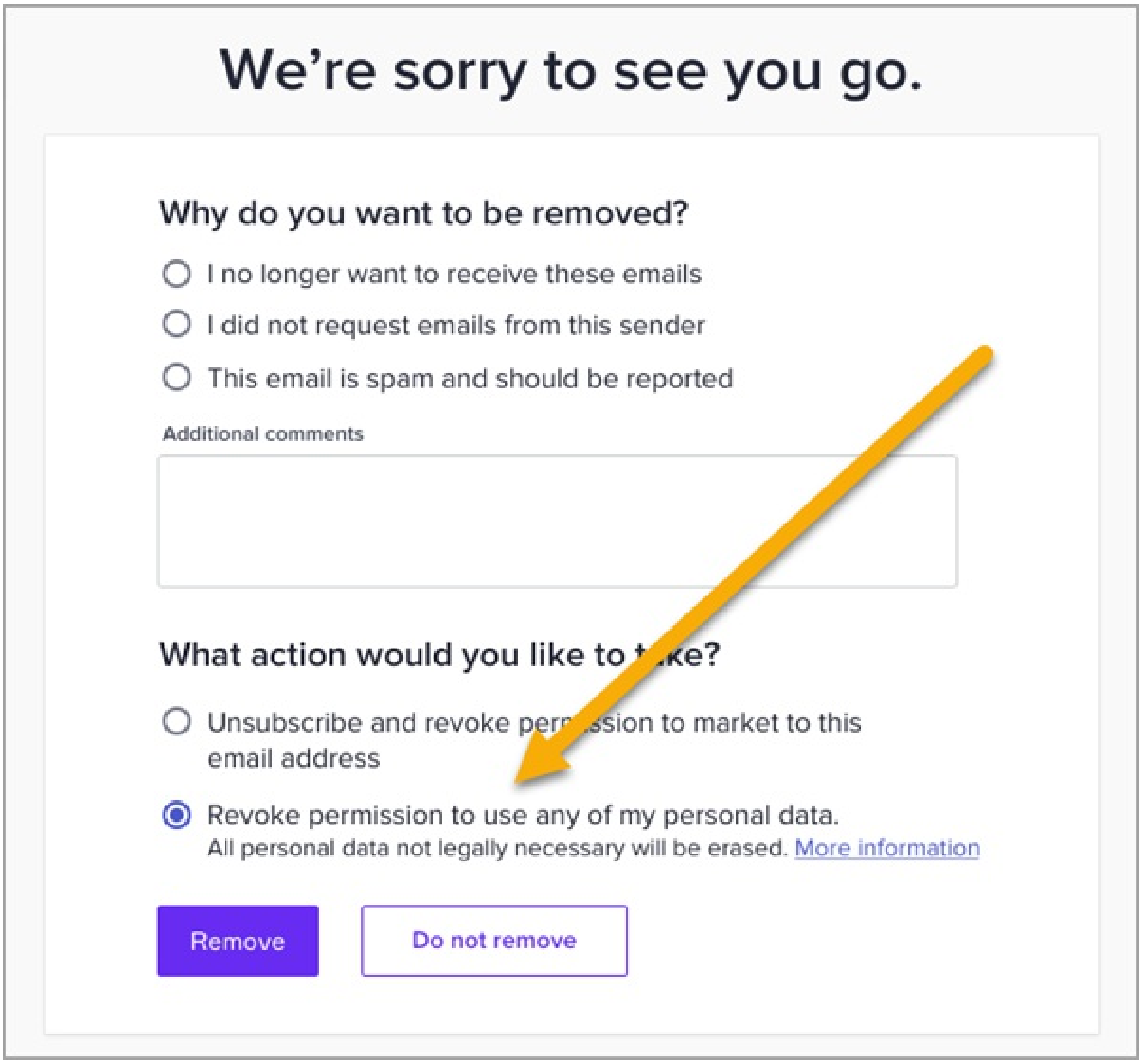
The following sections will explain how someone requests to be anonymized and how you go about processing the request in Infusionsoft.

Enable GDPR Capabilities

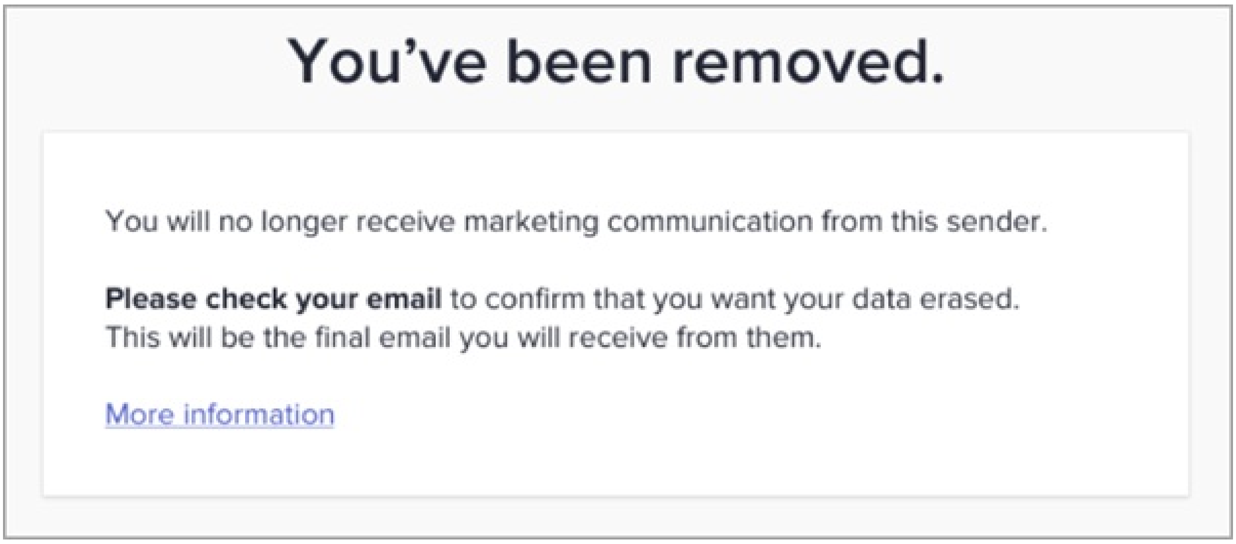
Click here to open a new tab with instructions on how to enable GDPR features in your app.

How a Contact Exercises Their Right of Erasure

1. When an email recipient clicks your unsubscribe link, they will be presented with an option to, "Revoke permission to use any of my personal data. All personal data not legally necessary will be erased."



2. After choosing the above option, the recipient will be brought to a success page which notifies them that a final confirmation email is on the way.



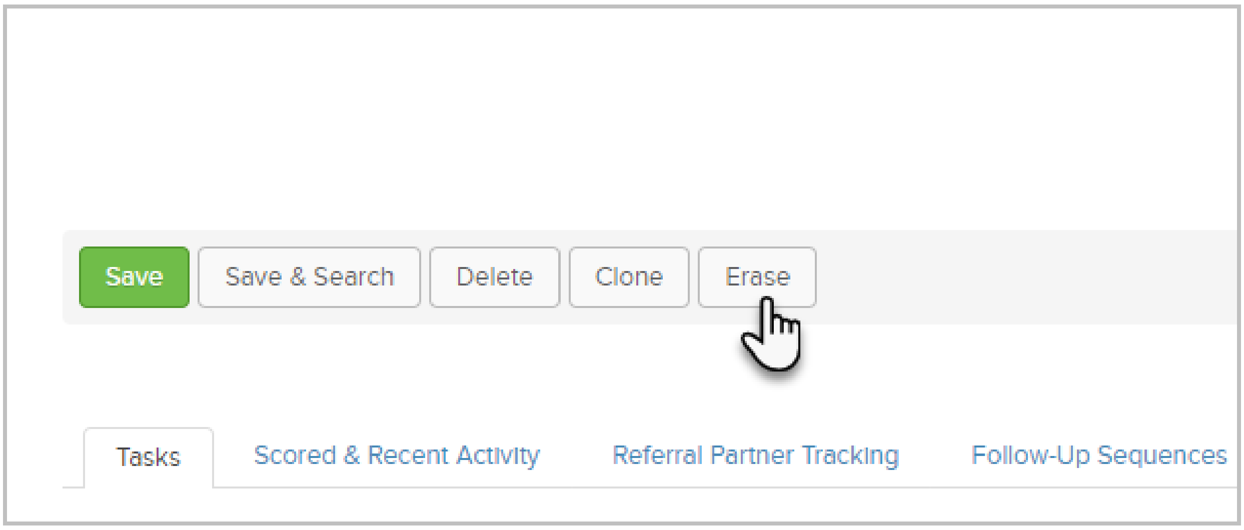
3. After clicking the link in the email to confirm they would like to have their personal data erased, all admin users of the associated Infusionsoft account will receive an email notification of the request.

4. The email notification will give you the information you need to look up the account and take action.

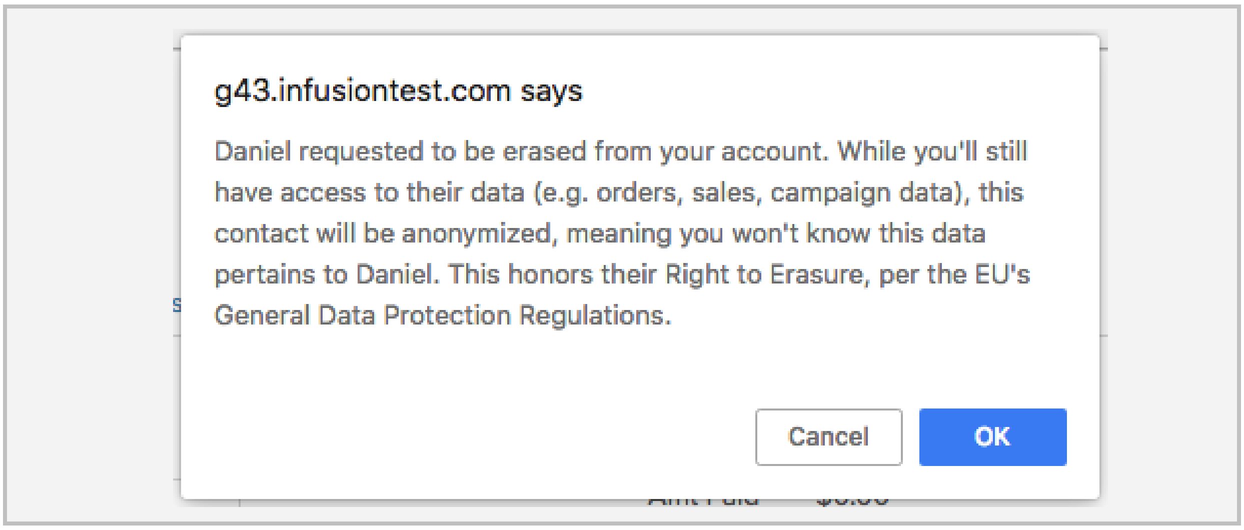
How to Anonymize (Redact) a Contact Record

1. Open the contact record specified in your notification email and scroll down to the bottom of the page.

2. Click the **Erase** button



3. Read the description regarding the redacting process and click **OK** to confirm.



How Anonymous Records Work

After anonymizing a contact record, all personal data related to the record will be obfuscated from view. Any campaign and sales history will remain on the record; however, you will no longer be able to tie this history to any specific person. The recent email history will not be available.

Additionally, you will no longer be able to add this contact record back to Infusionsoft. If you try to create the contact record or upload a list that contains this record, you will be alerted with the message, "Due to GDPR guidelines, you're unable to contact this person at this email address. They've opted out of any communications for this account and are exercising their right to be removed from your records."

Once a contact is redacted, it is essentially blacklisted from being used in your account. The only way that the personal data will ever come back is if they purchase something from you; in which case a new contact record is created and use of their personal data is de-blacklisted from your account.

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Apply GDPR Tags To Checkboxes

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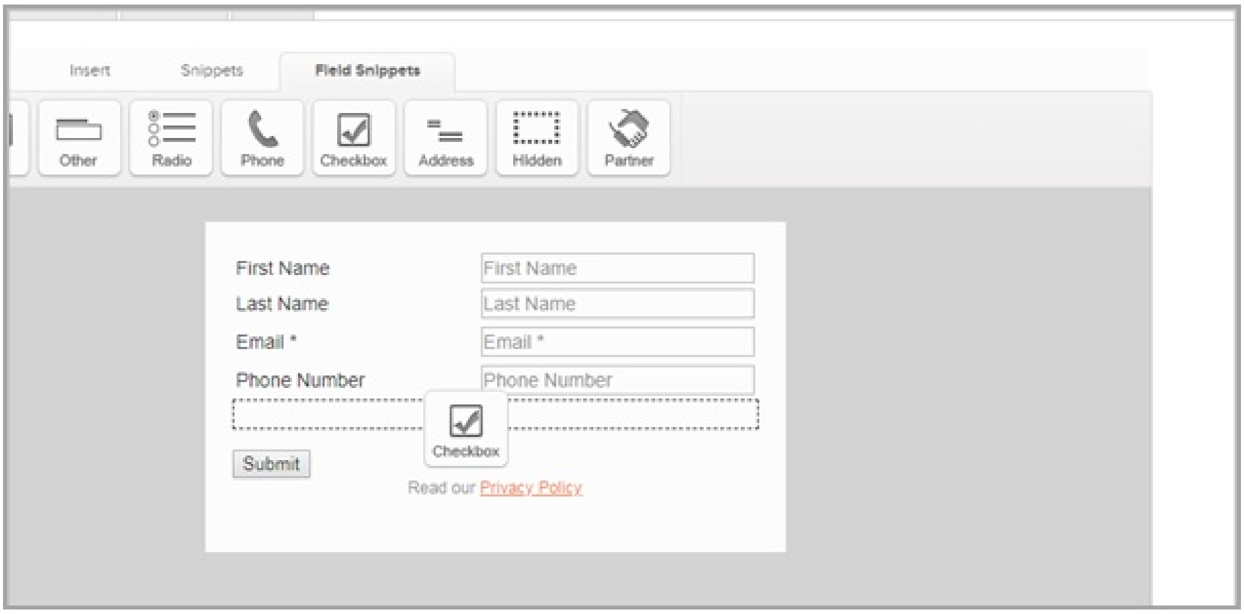
When obtaining consent on a web form or landing page , you'll need to know how to apply a tag when someone checks a box, then submits the form.

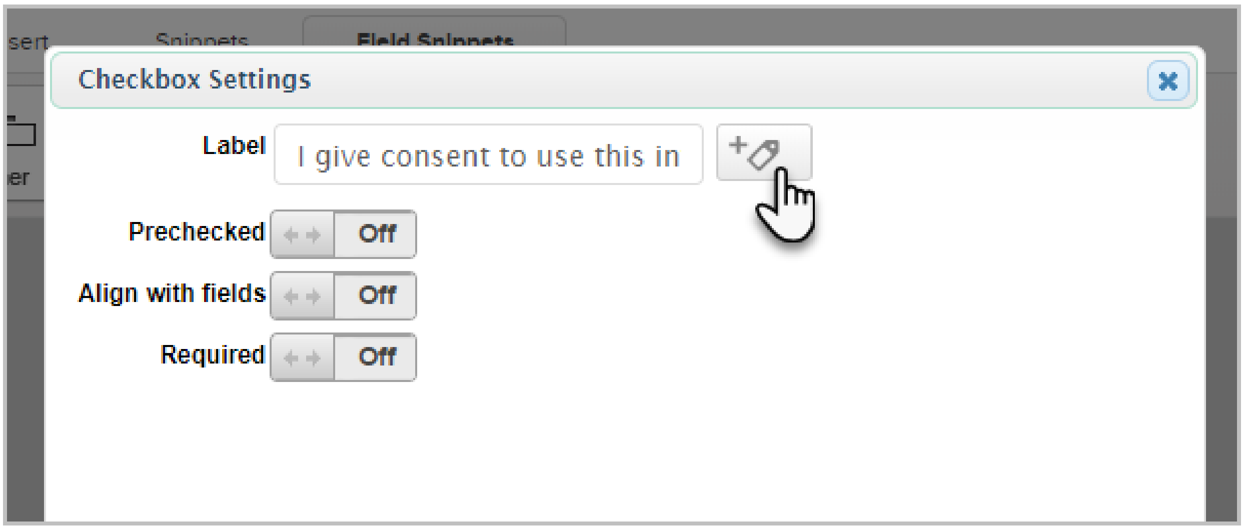
Apply a tag to a web form checkbox

1. Drag a Checkbox snippet below the opt-in feilds, above the submit button

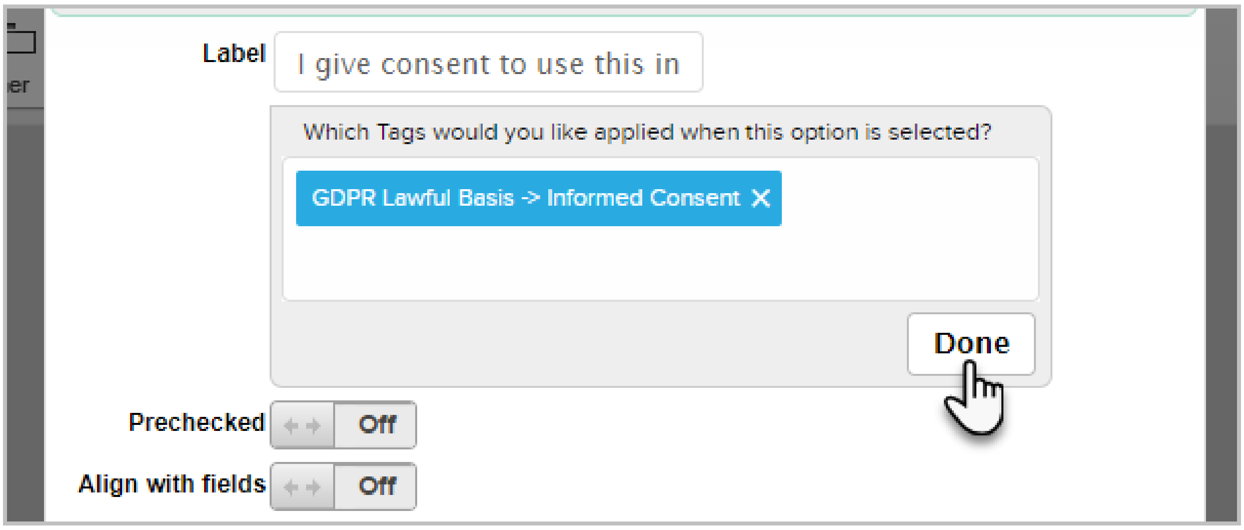


2. Enter the label, "I give consent to use this information to send additional emails and communication as described in your Privacy Policy"

3. Click the **Tag** icon



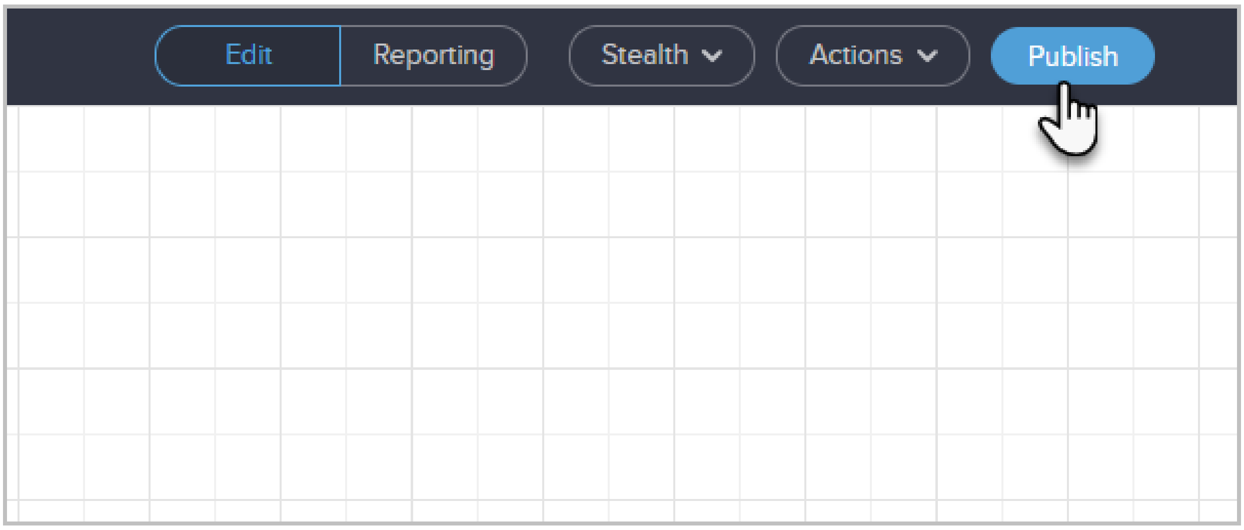
4. Select the, Informed Consent tag you created earlier.



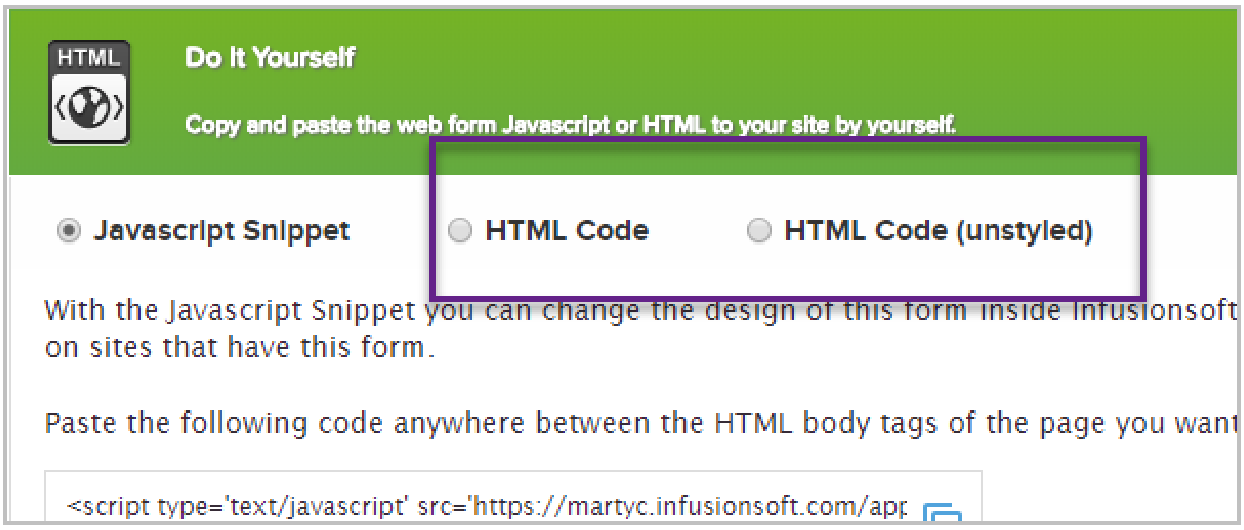
5. Warning! Do not pre-check the box. Pre-checked forms are not GDPR compliant!

6. We recommend making this a required field

7. When you are done, go back to the campaign canvas and republish your campaign.

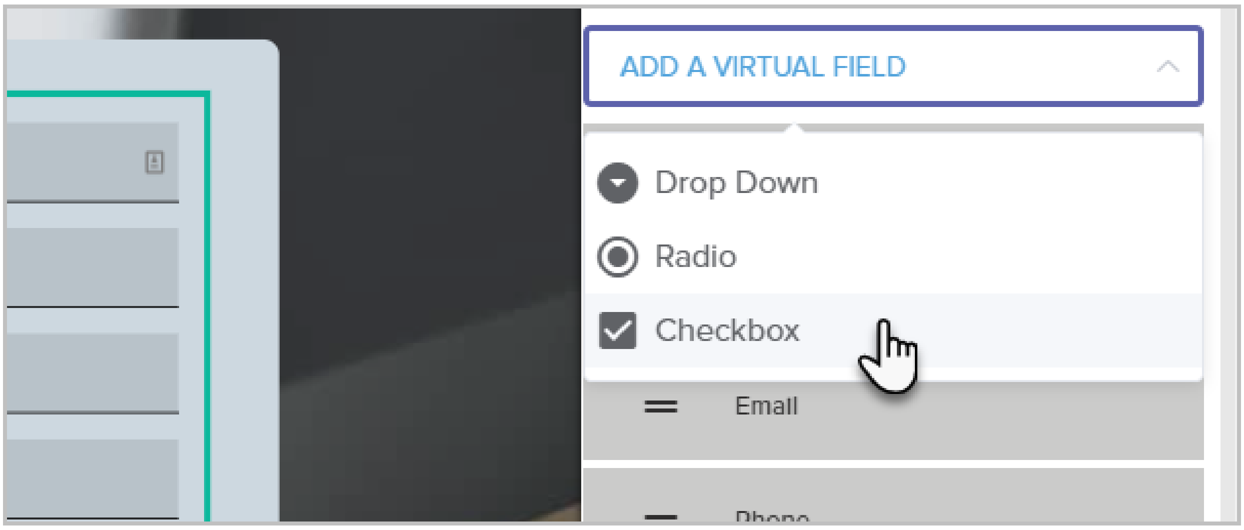


8. If you are using one of the HTML versions, you'll need to update the code on your website.

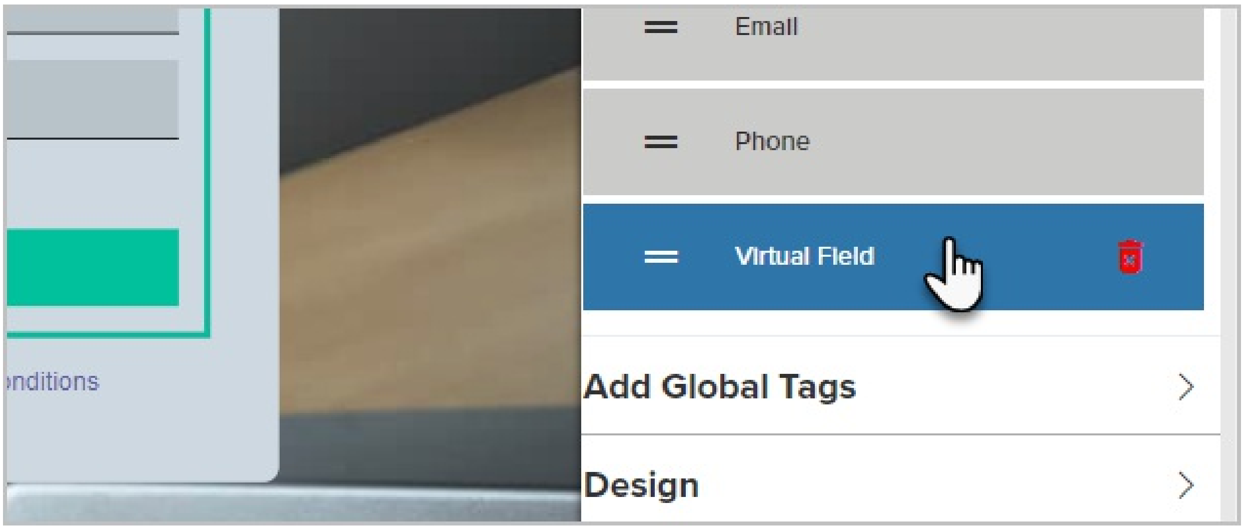


Add a Tag to a Landing Page Checkbox

1. On your landing page form, click the Add Virtual Field button and choose Checkbox.

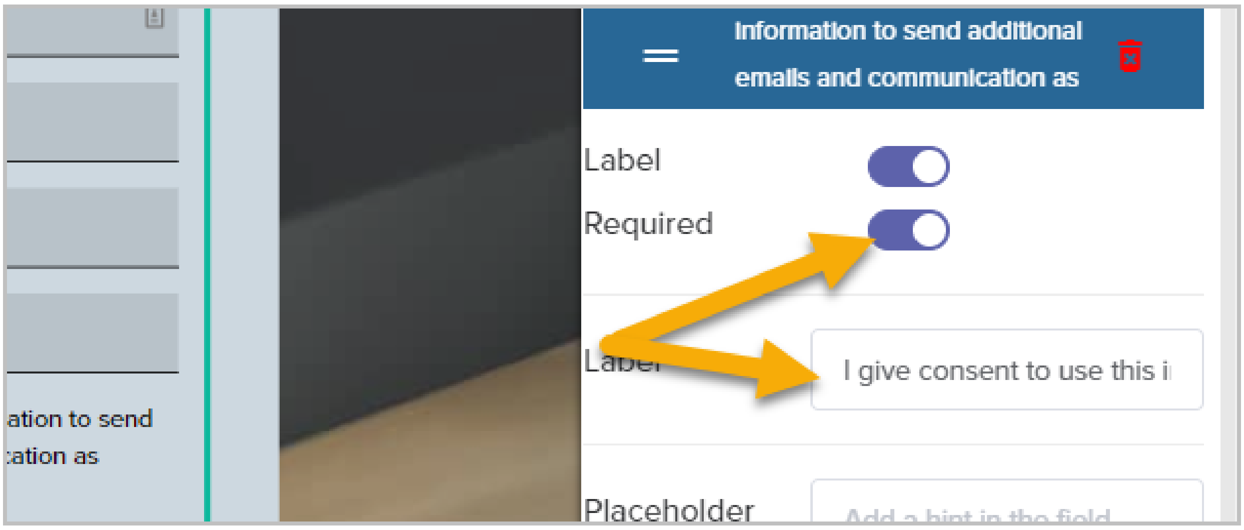


2. Now, click on your new Virtual Field

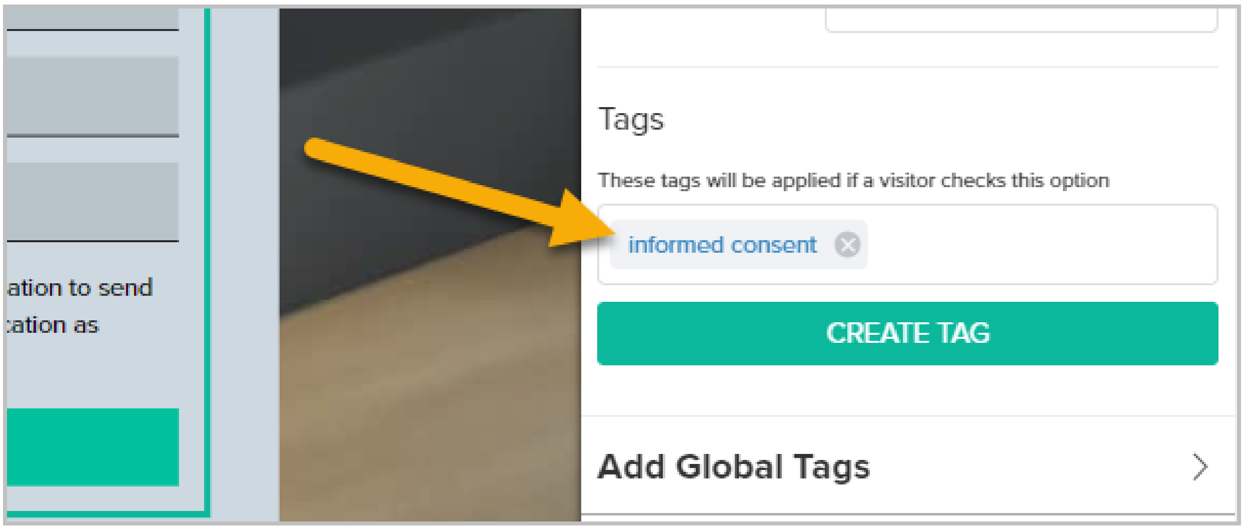


3. Enter the label, "I give consent to use this information to send additional emails and communication as described in your Privacy Policy"

4. It is highly suggested to make this required so that all contacts that enter from this landing page have shown informed consent.



5. Scroll down and enter the informed consent tag you created earlier.



6. When you are finished, just Next step the landing page to the end and republish it.

Using a different version of Infusionsoft? Click Here to learn more

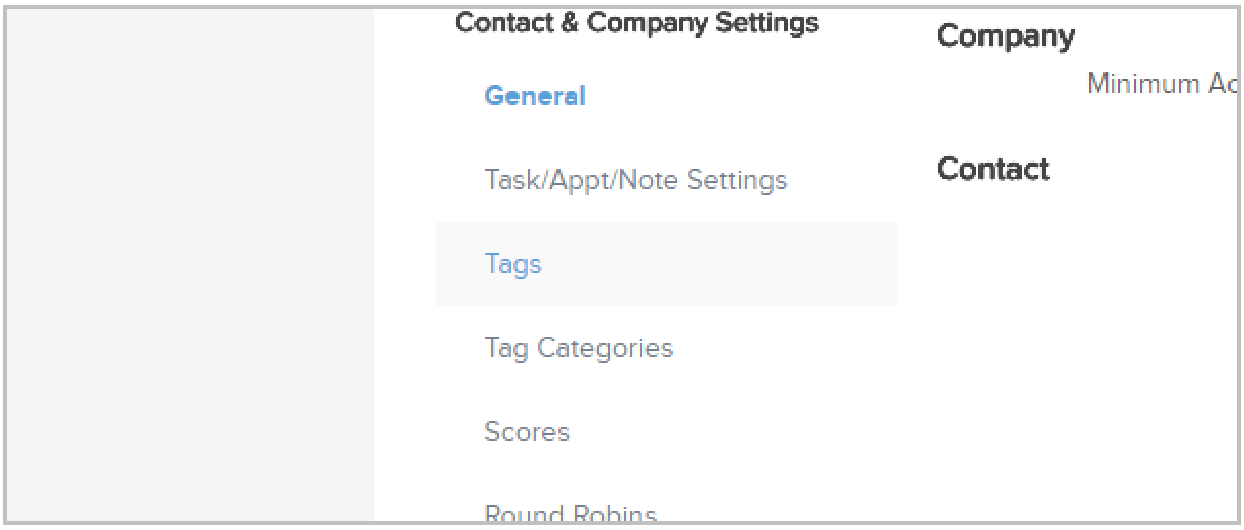
Create GDPR Tags

Last Modified on 08/02/2018 2:21 pm MST

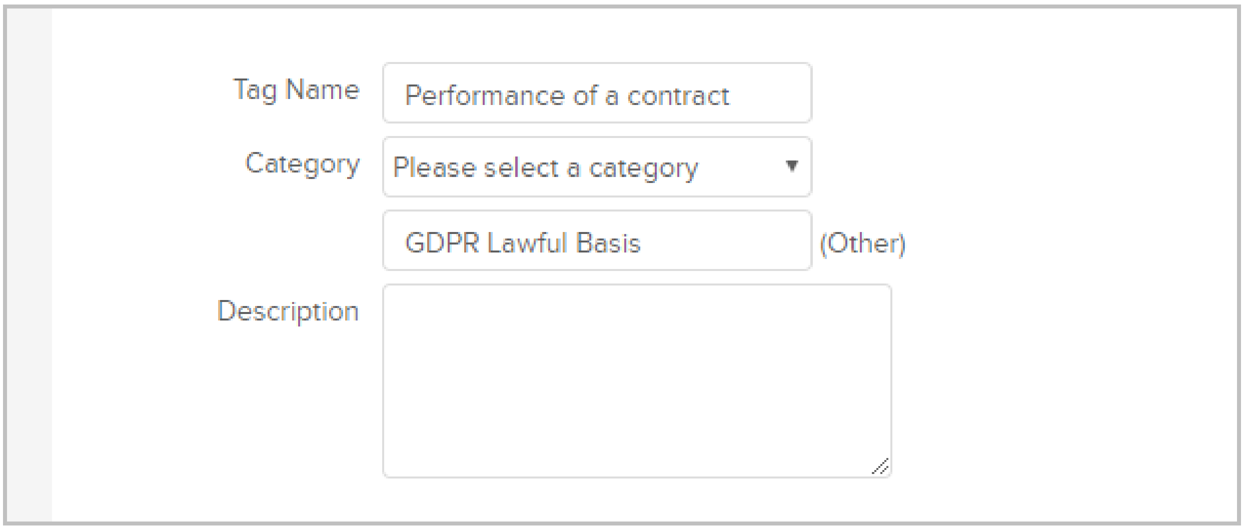
Please create GDPR tags as follows:

Important! If you downloaded and installed the GDPR Readiness Campaign, these tags will have been automatically created for you. So make sure you don't create a duplicate set of tags!

1. Go to CRM > Settings and click Tags



2. Enter the tag name and enter the name of the new tag category. Click the Add Tag button at the bottom of the page to create each tag. The names are as follows: Tag Category: GDPR Lawful Basis, Performance of a contract, Legitimate Interest and Informed Consent.



3. Your list of tags should include these now:

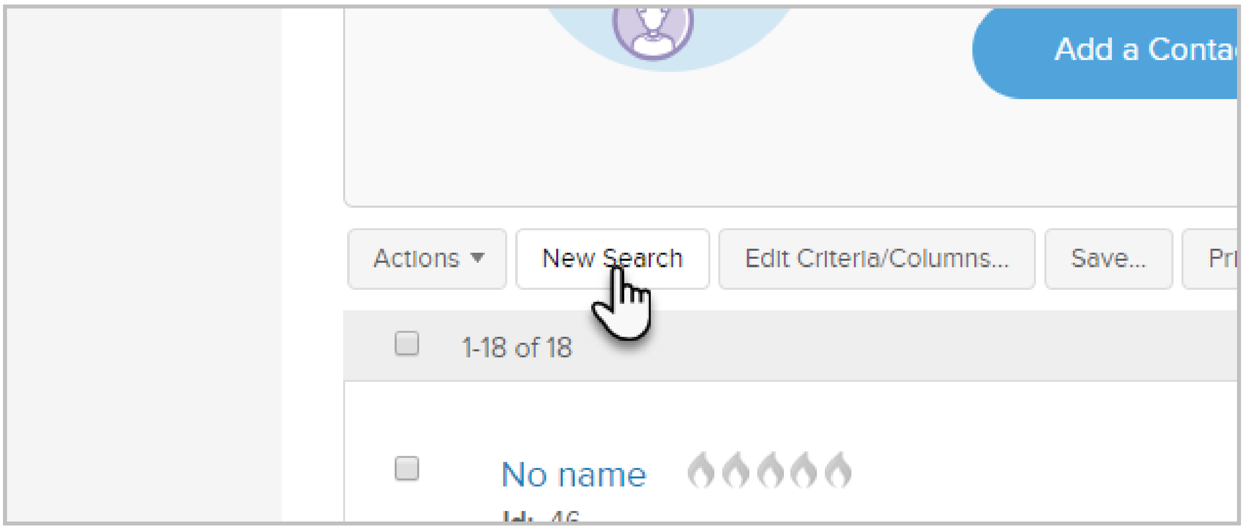
	Id	Name	Number of people	Category
	925	Performance of a contract	0	GDPR Lawful Basis
	923	Legitimate Interest	0	GDPR Lawful Basis
	921	Informed Consent	0	GDPR Lawful Basis

GDPR Pruning

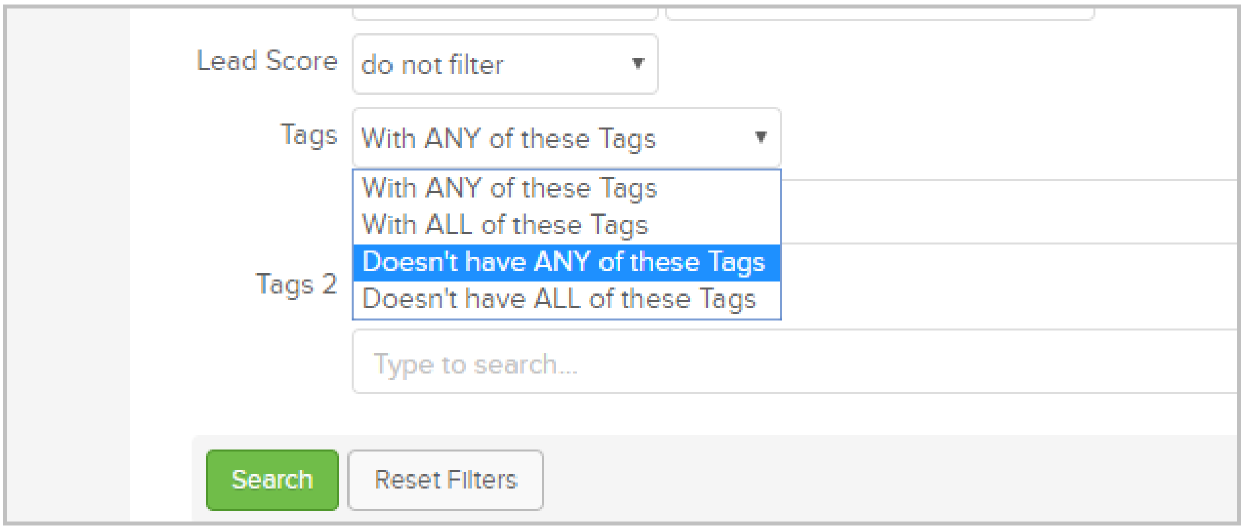
Last Modified on 08/02/2018 2:22 pm MST

It's recommended to create a process to view and prune contacts in which you no longer have a lawful basis to process a contact's data. This can be done by creating a saved search on your homepage dashboard for contacts that do not have a GDPR tag applied to them.

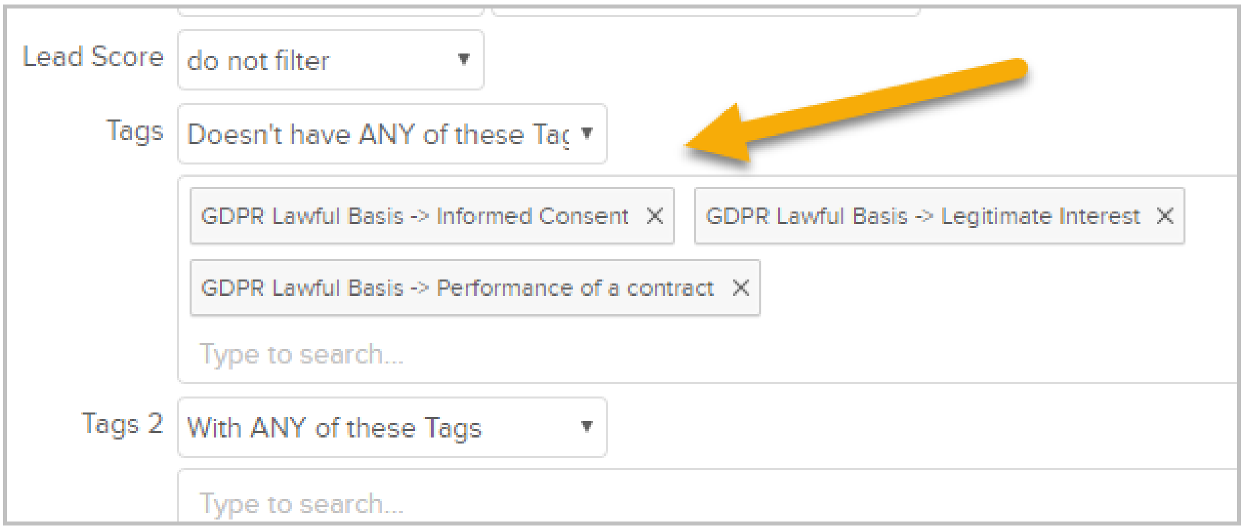
1. Go to **CRM** > **Contacts**
2. Click **New Search**



3. Choose **Doesn't have ANY of these Tags** next to the Tags label

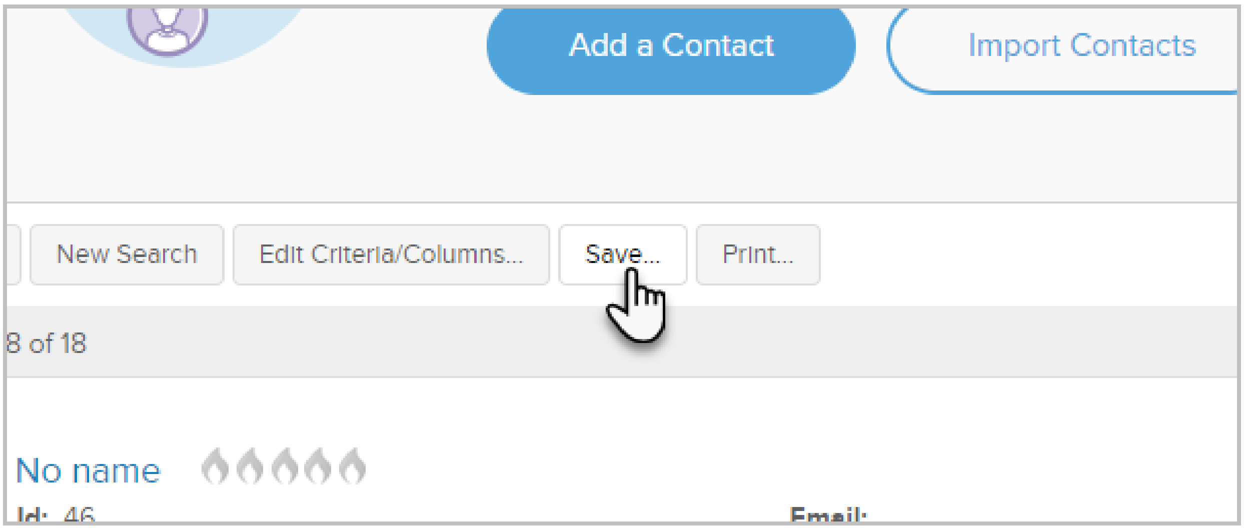


4. Enter all of your GDPR tags

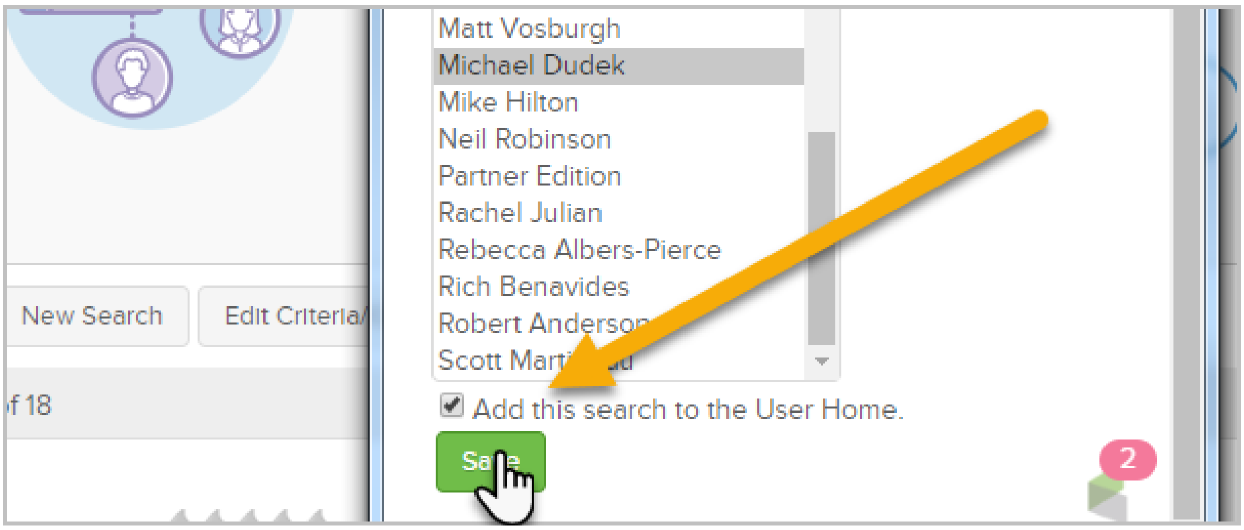


5. Click **Search**

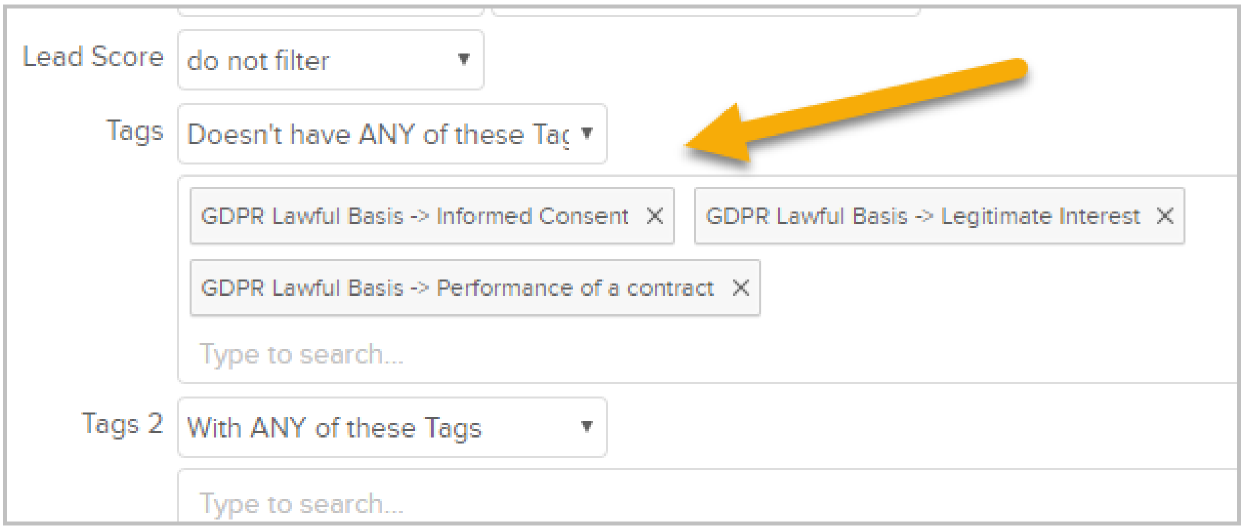
6. Click **Save**



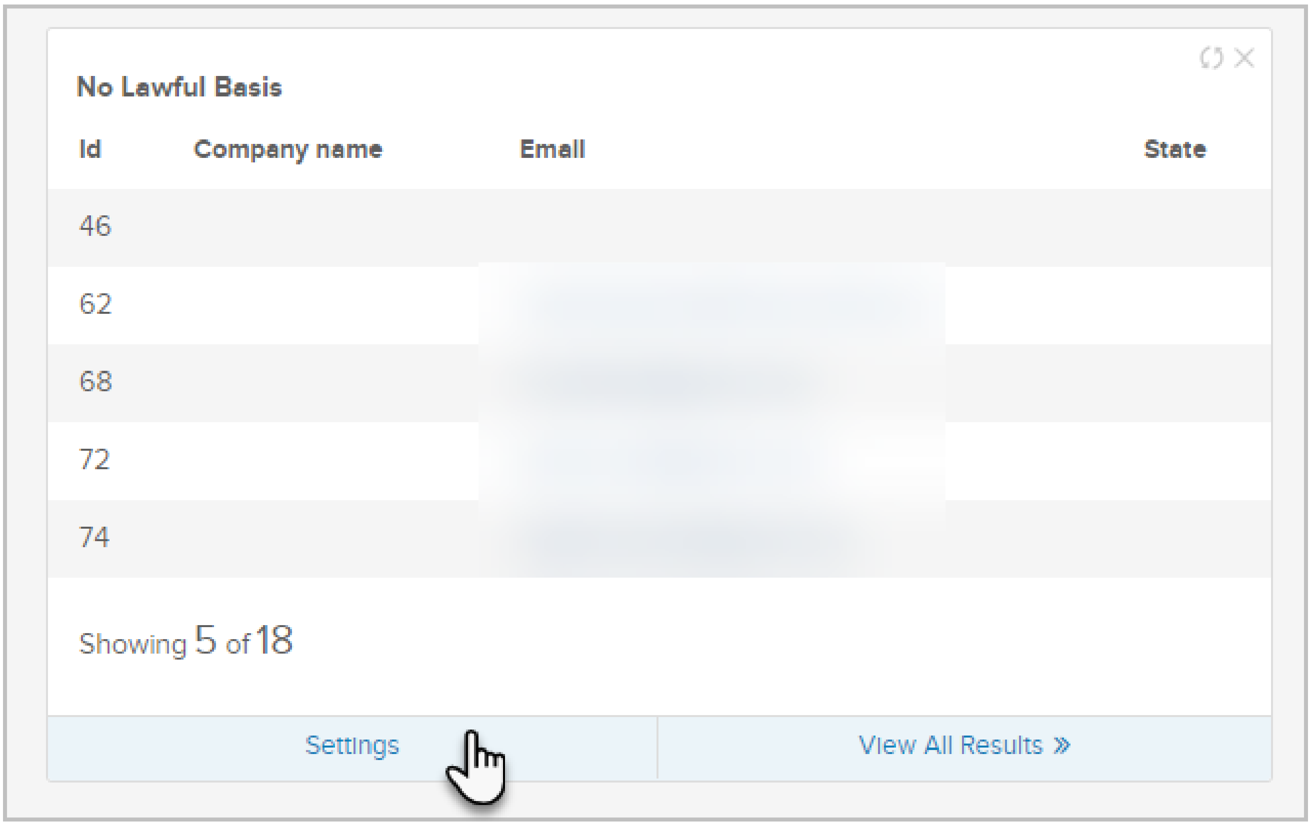
7. Enter the name of saved search.Select any other users that need access to this list, check the box to Add this search to the User Home and click **Save**



Example: "No Lawful Basis" or "Non-GDRP Compliant"



8. Now, go back to your dashboard to see your new saved search. You can click**Settings** to further customize the report.

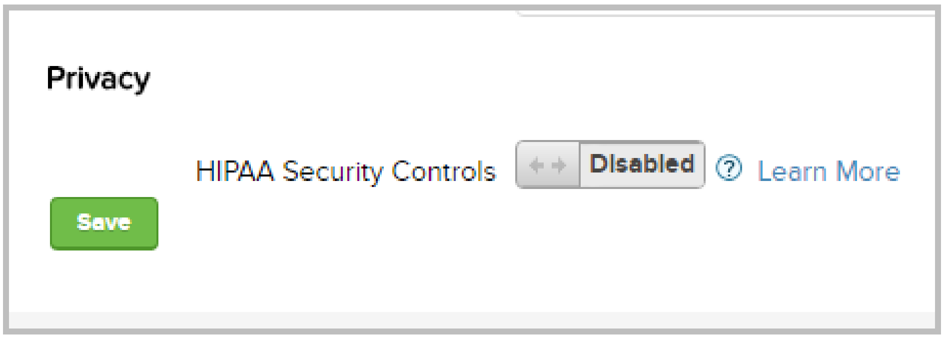


HIPAA

Last Modified on 08/02/2018 2:22 pm MST

Infusionsoft is compatible with HIPAA. Here is what you need to know

- A new *Admin Settings* section labeled, **Privacy** has been added. It contains a new toggle button called **HIPAA Security Controls**. It is used to indicate to Infusionsoft that your business is regulated by HIPAA and that your Infusionsoft app contains Protected Health Information (also known as **PHI**.) It should only be activated by those customers who are regulated by HIPAA. This setting is located in **Admin** > **Settings** > **General**. Look at the bottom of that page and take note of the new setting.



Important Note! While HIPAA is a U.S.-only regulation, it is difficult for us to effectively identify all of the operating territories of our customers, so this toggle will display for all Infusionsoft accounts.

- By default, the toggle is set to have the HIPAA controls **Disabled**.
- When you select and save the toggle to have HIPAA Security Controls **Enabled**, it can only be disabled again by contacting Infusionsoft Support and will be processed by an Advanced Support team member. To avoid accidentally enabling this security control, you will have to double confirm before saving it as **Enabled**.)
- Vendors that Infusionsoft contracts to provide overflow and after-hours support are not

yet HIPAA compliant and cannot be granted access to an Infusionsoft account that contains PHI. This means that your account will be fully supported only by in-house Infusionsoft Support during regular business hours.

USA Toll Free
+1 866 800 0004 Ext. 2
Monday-Friday 6AM - 5PM Arizona Time

- Enabling HIPAA Security Controls in Infusionsoft does not make your business HIPAA complaint. It does, however, make it technologically possible for you to be compliant in the future as we continue to roll-out this feature.

The Infusionsoft HIPAA Business Associate Agreement Addendum (BAA)

- Infusionsoft offers customers the opportunity to execute our standard Business Associate Agreement Addendum (or **BAA**) that satisfies the applicable subcontracting requirements under HIPAA and the HITECH Act.
- Before using Infusionsoft in support of your HIPAA compliance, be sure to do the following:
  - Configure your Infusionsoft app as a HIPAA app by enabling the HIPAA Security Controls. This setting is located in **Admin > Settings > General**, under the section labeled **Privacy**.
  - Once the HIPAA Security Control is enabled, review the BAA below, complete all the required fields, and sign the BAA in accordance with the instructions.
  - Be sure to confirm your email address after you sign. To do this, follow the instructions in the email you receive from Adobe® Sign. This verification email will be sent to the email address you specify when signing the Addendum. If you don't see the email in your inbox, be sure to check your spam folder.
  - A fully executed copy of the BAA will then be emailed to both parties.
- To review the BAA, click here .

HIPAA FAQs

Q: **What is HIPAA?**
A: The Health Insurance Portability and Accountability Act (HIPAA) is a federal law that sets baseline privacy and security standards for medical information. Click here to learn what

types of businesses are regulated by HIPAA.

Q: **What is a Business Associate?**
A: People and companies that are hired or contracted by HIPAA covered entities. Infusionsoft is a business associate for our small business customers that are covered by HIPAA and have signed the Infusionsoft Business Associate Agreement Addendum.

Q: **Is Infusionsoft HIPAA Certified?**
A: There is no such thing as "HIPAA Certified", but the Infusionsoft software application is compatible with HIPAA, and Infusionsoft complies with HIPAA as a business associate as described in our BAA.

Q: **I need advice on how to comply with HIPAA. What should I do?**
A: Infusionsoft can't provide any interpretation of HIPAA as it pertains to a customer's particular circumstances. If you need help with HIPAA, consult a qualified attorney or legal advisor.

Q: **Once I sign the BAA, does that mean I'm automatically HIPAA compliant?**
A: HIPAA compliance is complicated, and the act of enabling HIPAA Security Controls in your Infusionsoft app does not alone make your business HIPAA complaint. But Infusionsoft is a HIPAA compatible application and can be used by organizations that are regulated by HIPAA to store, transmit, and otherwise process PHI.

Q: **What about CustomerHub, GroSocial, and third-party apps and services that integrate with Infusionsoft? Are those products and services HIPAA compatible too?**
A: CustomerHub and GroSocial are not HIPAA compatible. Other Marketplace vendors may or may not offer HIPAA compatible solutions. Be sure to check directly with your Marketplace vendors – the Infusionsoft BAA does not cover your use of third party products or services.

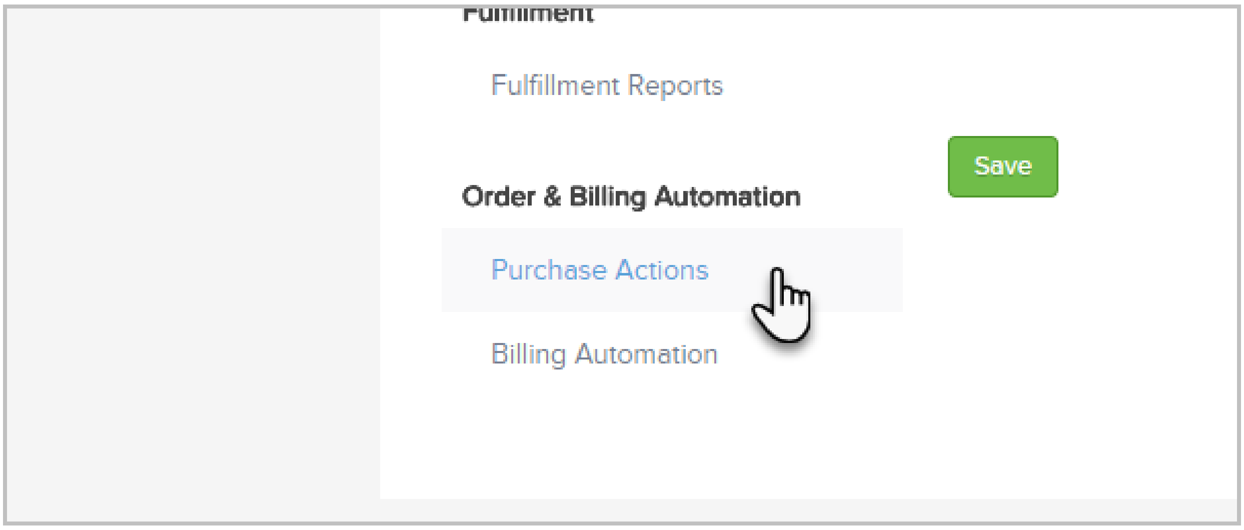
Using a different version of Infusionsoft? Click Here to learn more

Tag Purchases With Performance Of Contract

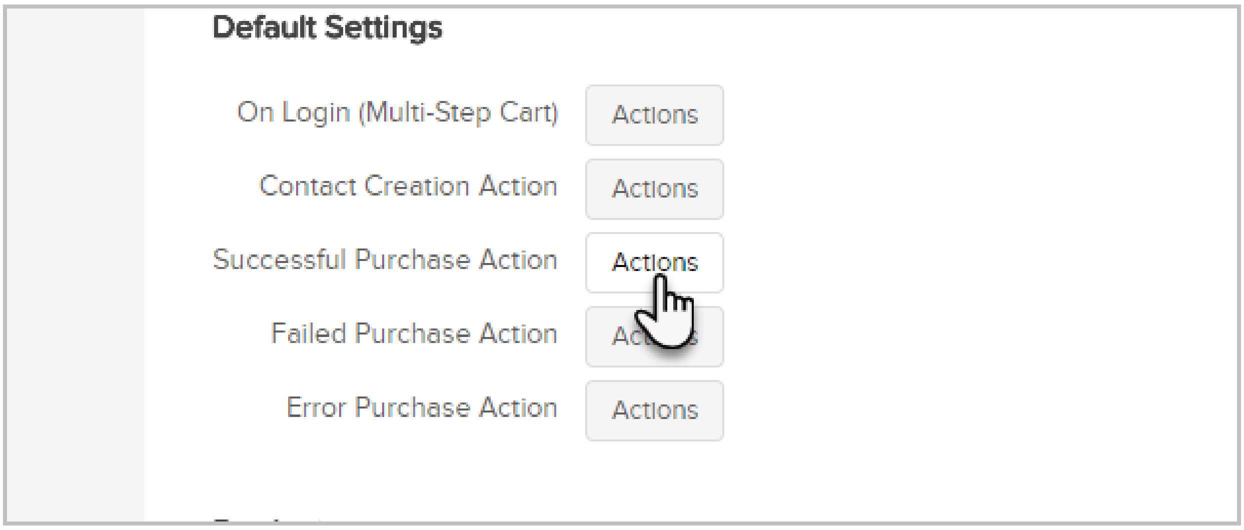
Last Modified on 08/02/2018 2:22 pm MST

When someone purchases from you, you should apply a tag called, Performance of Contract in order to help be compliance with GDPR law. Performance of a contract means that the contact purchased a good or service from you and you feel that you have Lawfulness of Processing. You can do this quickly by simply adding a purchase action to tag automatically on successful purchase.

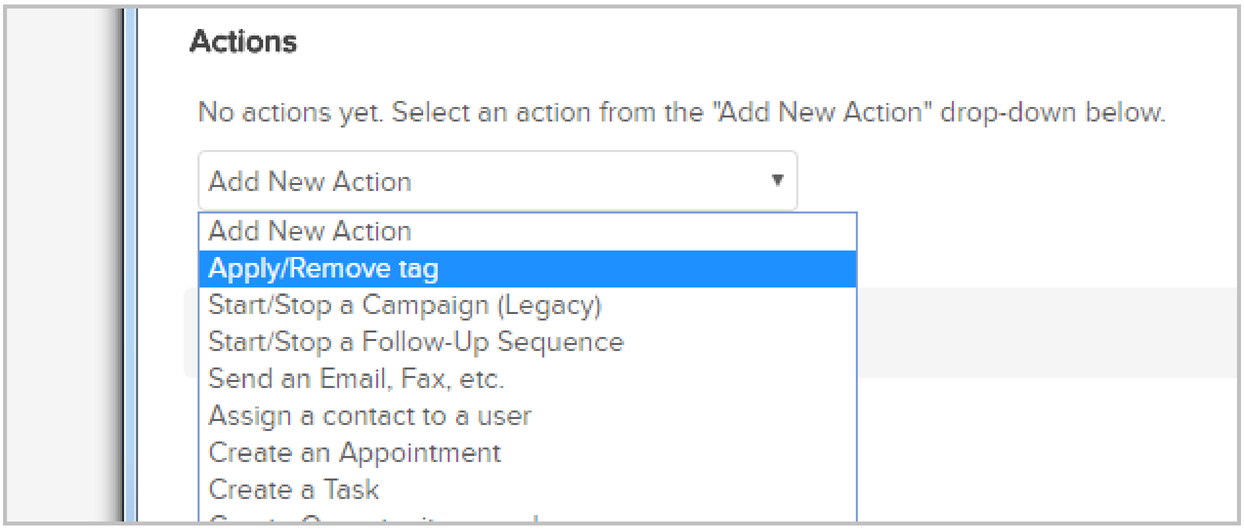
1. Go to **E-Commerce** > **Settings**
2. Click on **Purchase Actions**



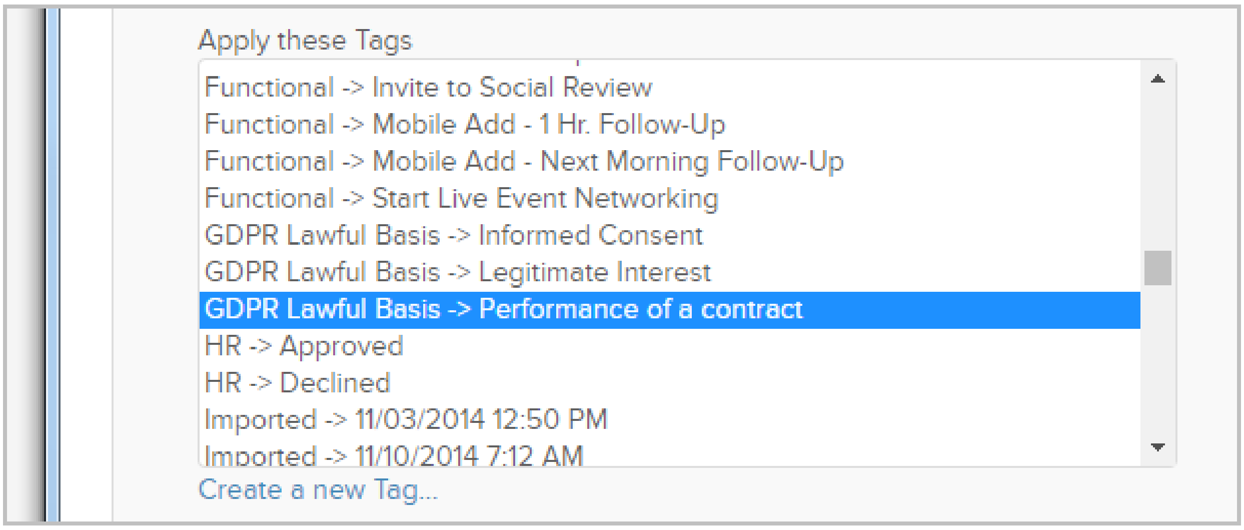
3. Click **Actions** next to Successful Purchase Actions



4. Add an action to Apply tag



5. Add the Performance of contract tag and save



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GDPR - Linking To A Privacy Policy

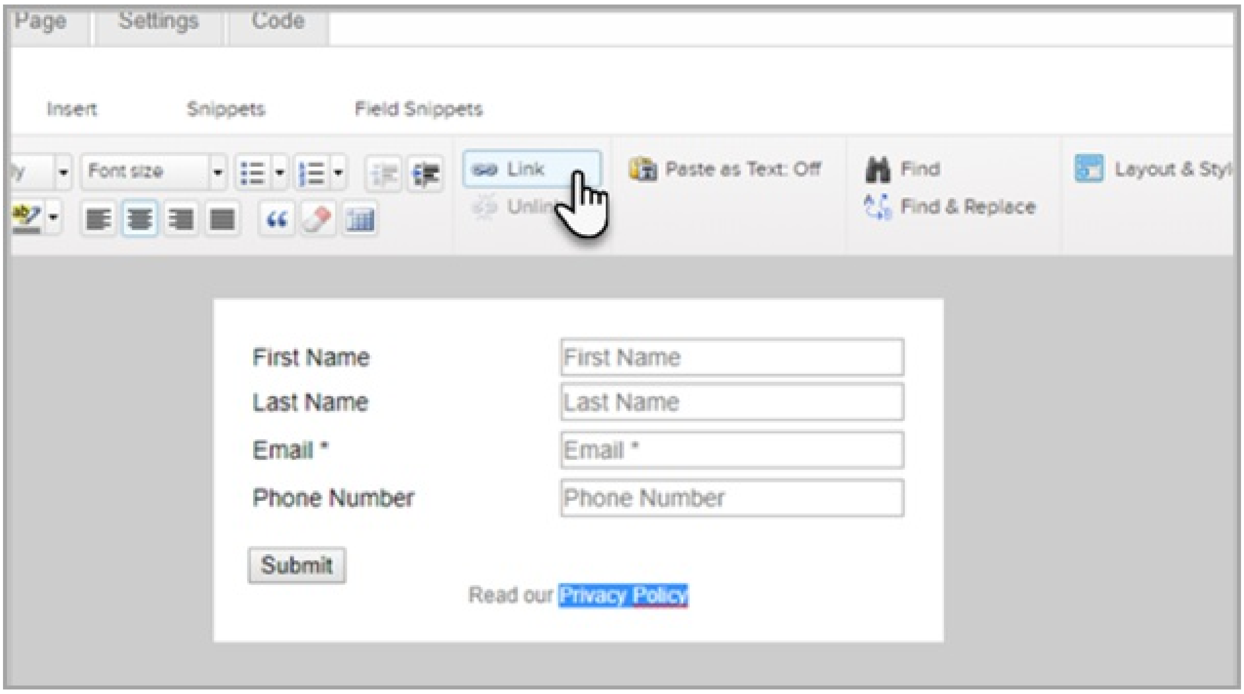
Last Modified on 08/02/2018 2:22 pm MST

GDPR requires that your Privacy Policy be available on any page that collects personal information.

Link to a Privacy Policy on a Web Form

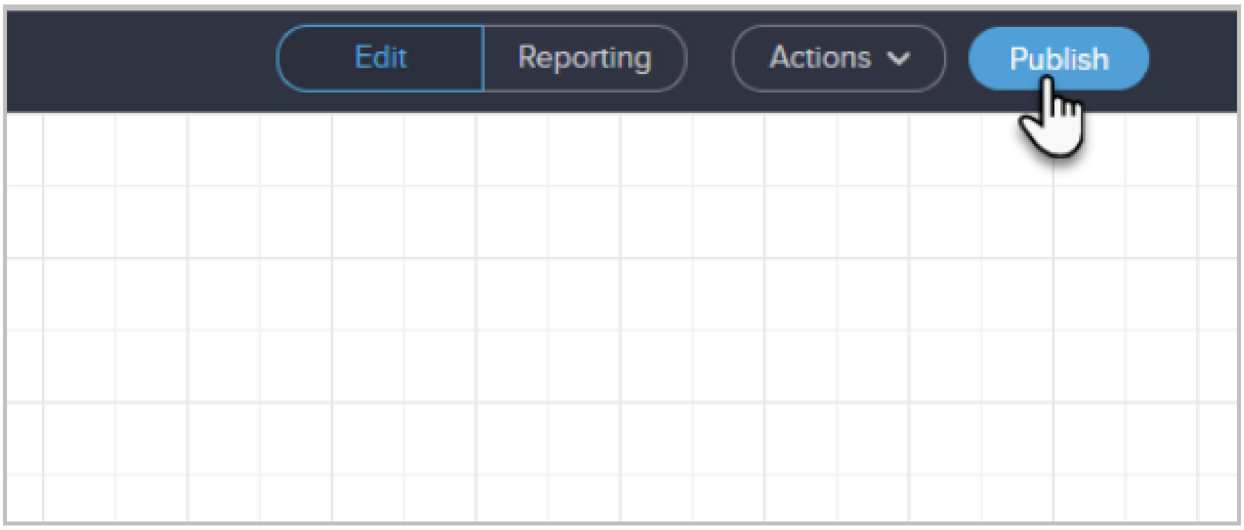
1. Drag a Paragraph snippet below the Submit button.

2. Type "Privacy Policy", hightlight and click the Link button in the editor

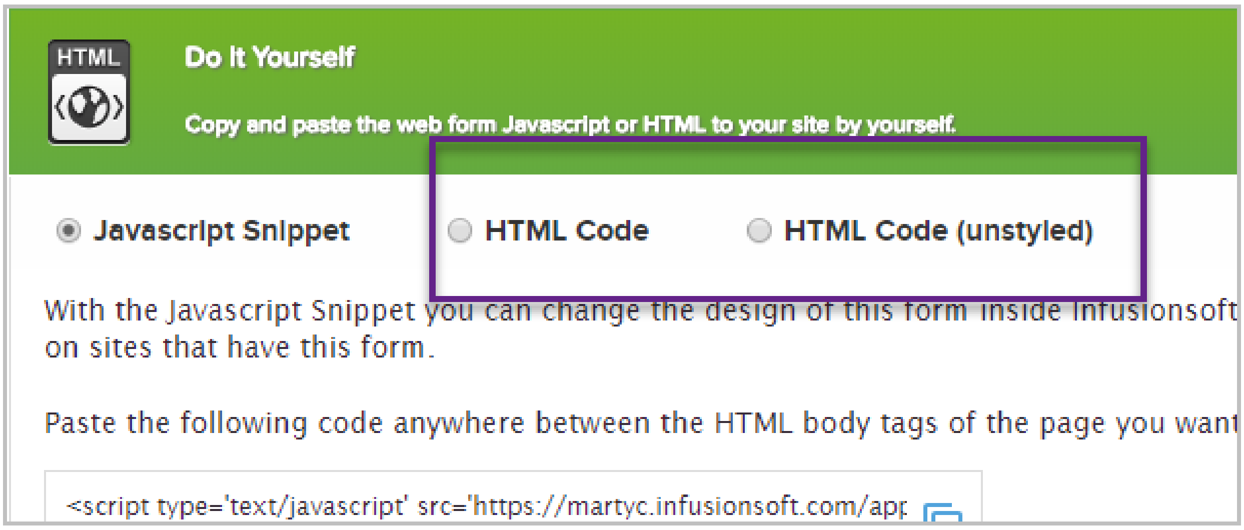


3. Add the URL to your Privacy Policy web page

4. Make sure to Republish the campaign.

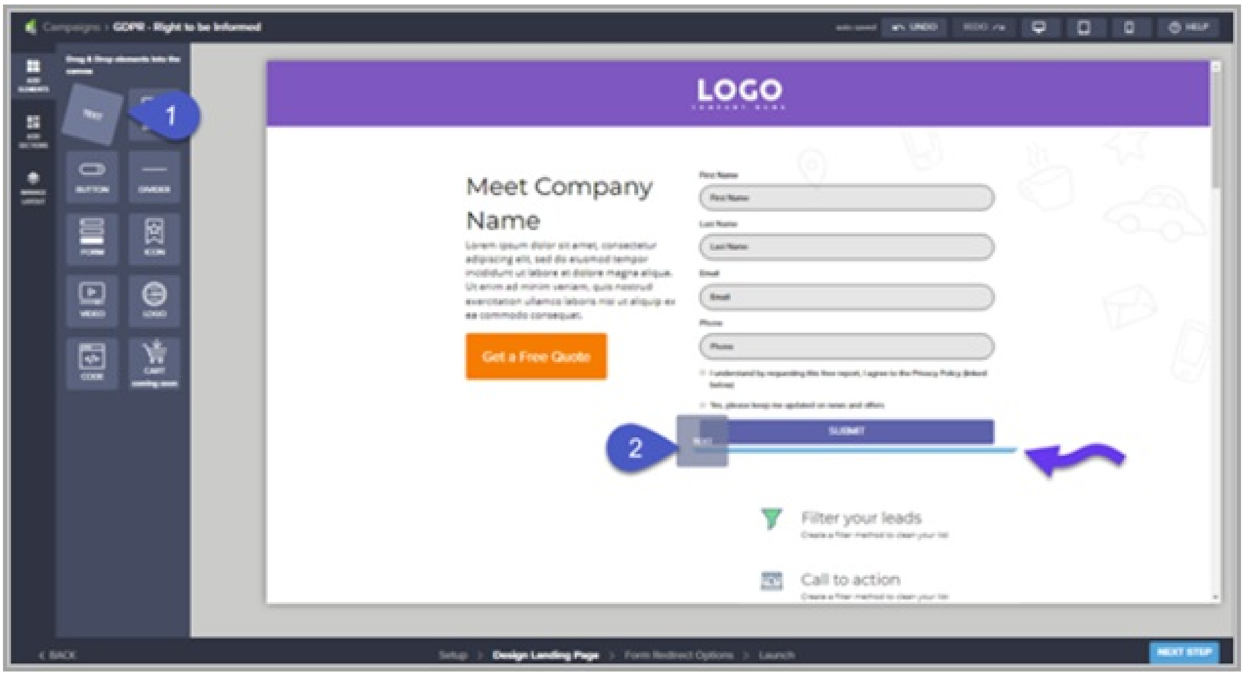


5. If you are using one of the HTML versions, you will need to update your existing code with the new code.



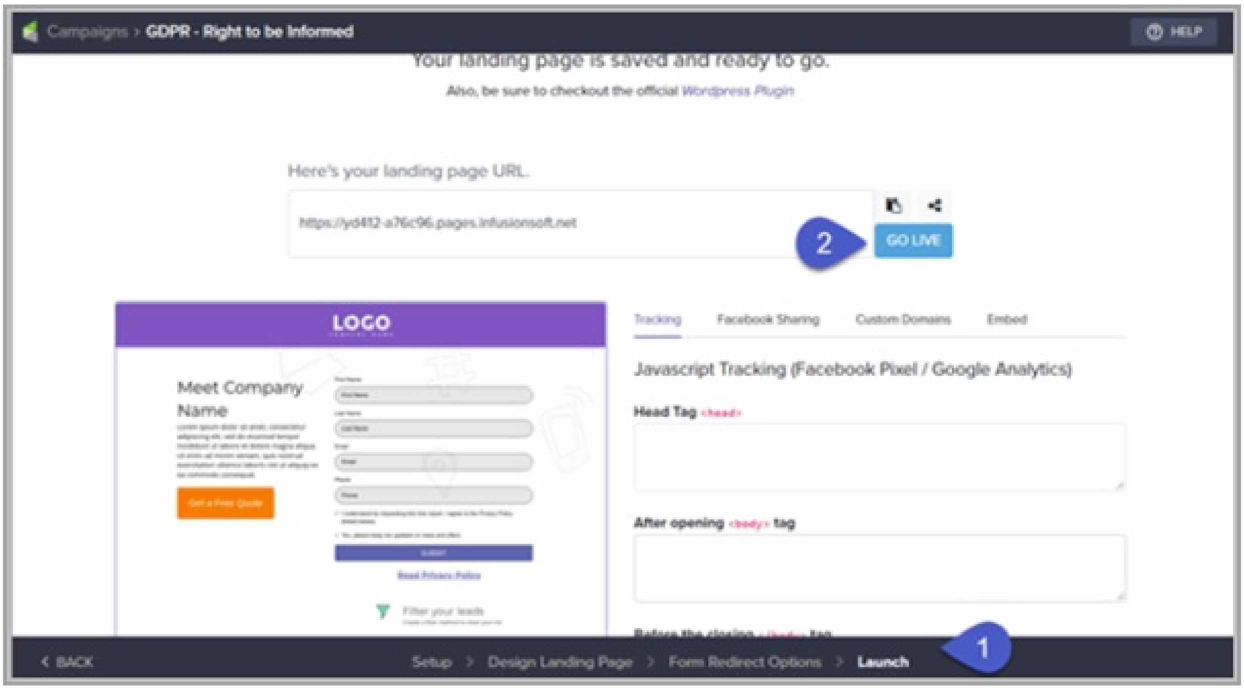
Link to a Privacy Policy on a Landing Page

1. Click the Add Elements block from the left menu and drag until you have a blue line under the Submit button.



2. Click into the Text box and add a link to your Privacy Policy web page.

3. Continue to Next Step your landing page and republish it.


Campaigns › GDPR - Right to be Informed
HELP
Your landing page is saved and ready to go.
Also, be sure to checkout the official Wordpress Plugin
Here's your landing page URL.
https://yd412-a76c96.pages.infusionsoft.net
2
GO LIVE
LOGO
Meet Company Name
Get a Free Quote
Filter your leads
Tracking
Facebook Sharing
Custom Domains
Embed
Javascript Tracking (Facebook Pixel / Google Analytics)
Head Tag <head>
After opening <body> tag
BACK
Setup
Design Landing Page
Form Redirect Options
Launch
1

Using a different version of Infusionsoft? Click Here to learn more

GDPR Campaign Instructions

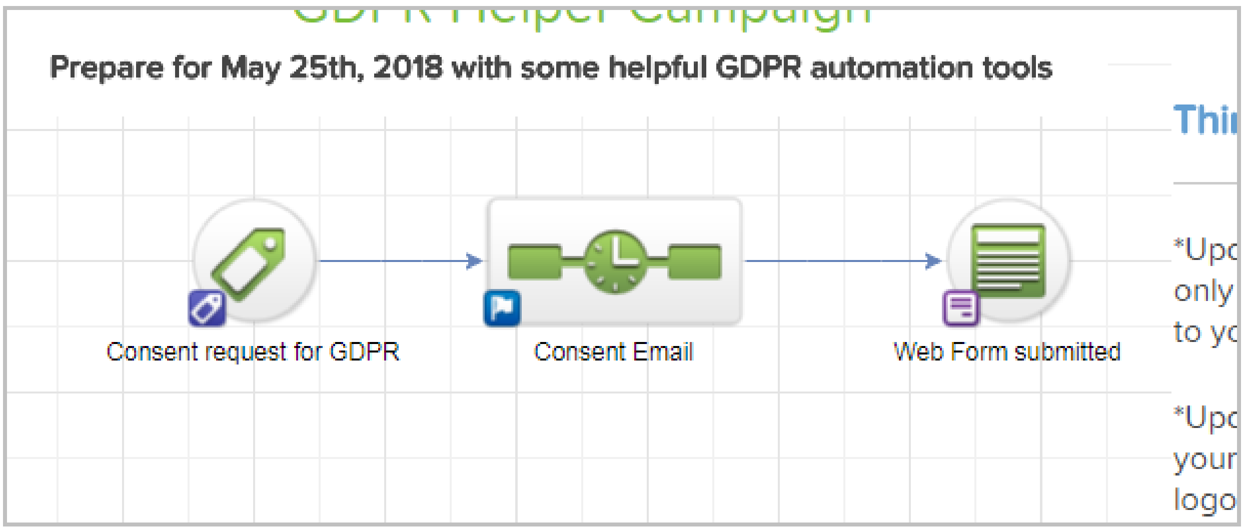
Last Modified on 08/02/2018 2:23 pm MST

These instructions will help you download and configure the GDPR Helper Campaign. The purpose of this campaign is to help you better manage the personal information that you store for persons residing in the European Union which is covered by GDPR law.

DISCLAIMER: We can't interpret the law for you. We're not sanctioned, legal representatives. However, we've done our best to make a complex topic more understandable and actionable for you. Please consult your legal adviser.

1. Download the GDPR Helper Campaign from the Infusionsoft Marketplace.

2. The top section is a simple process that starts when you apply the **Consent Request for GDPR** tag to a contact record. When you apply the tag, the**Consent Email** sequence begins which simply sends the contact an email request asking the recipient to confirm that they would like to keep receiving emails from you. The call to action is a button that goes to your new web form. It is an opt-in form with a GDPR consent checkbox and a link to your company's Privacy Policy (you will need to provide the link.) When the contact submits the form, the **Informed Consent** tag will be applied to the contact record.

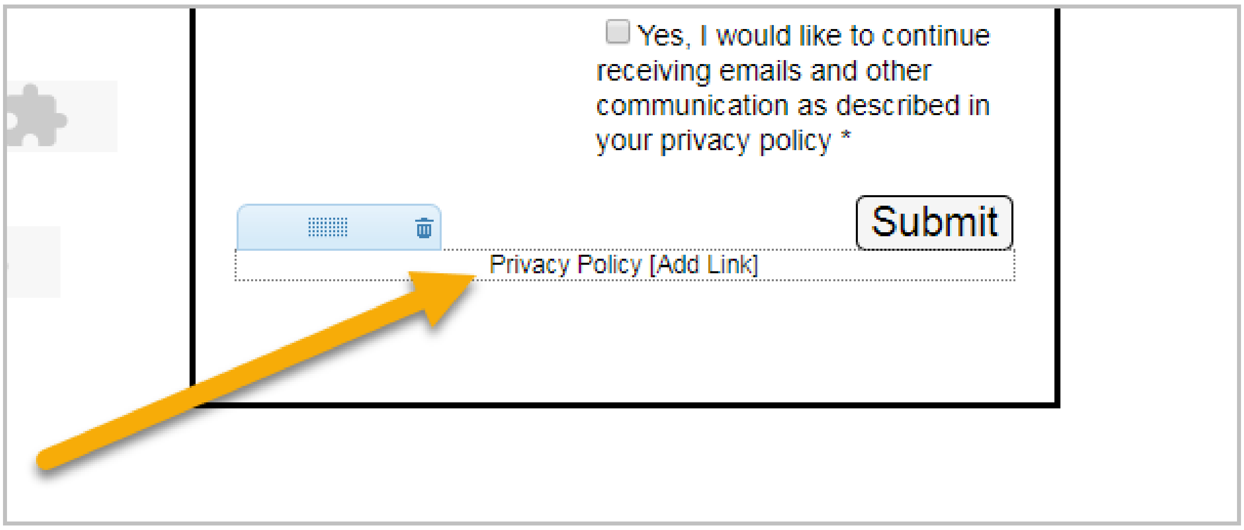


Here are your action items for the above section:

1. Open the Consent Email and make any changes that you wish or you can keep the default language

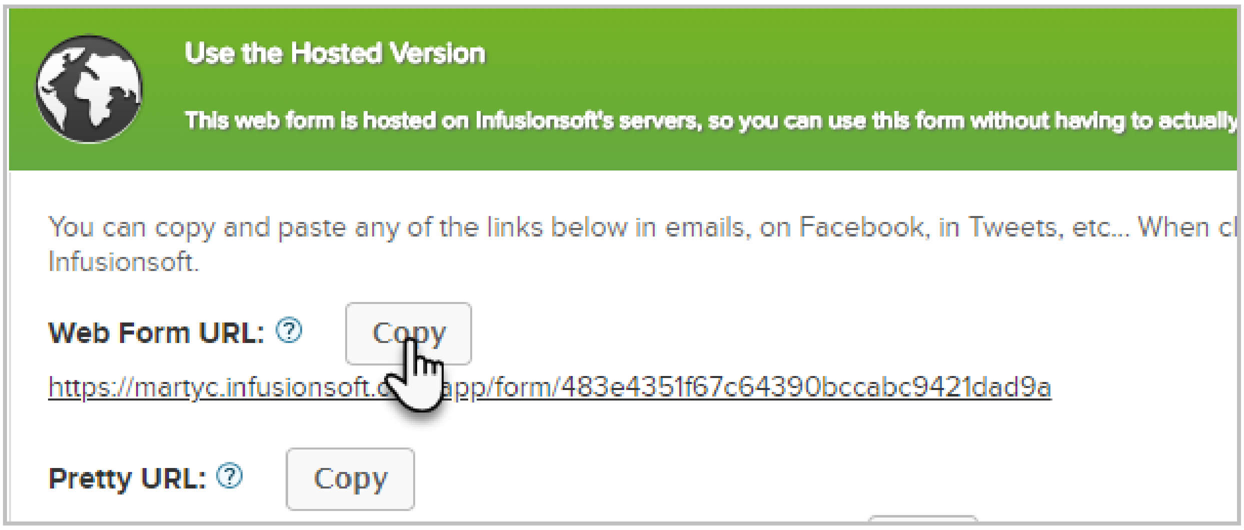
2. Open the **Web Form submitted** goal

3. Add a link to your Privacy Policy below the form

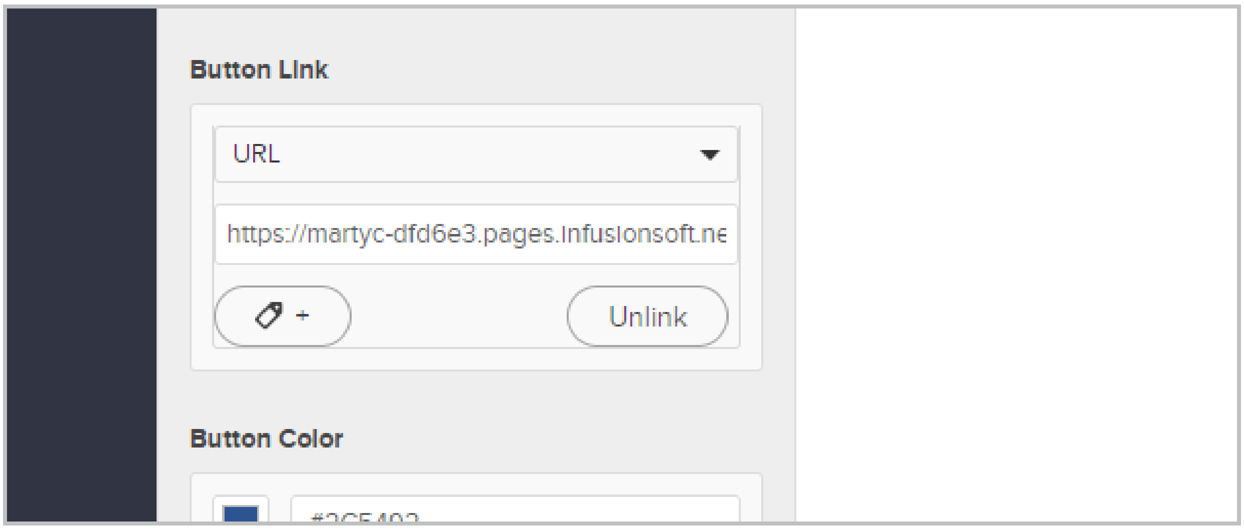


4. Make any additional styling changes to the web form and Thank-you page.

5. Go to the **Code** tab and grab the hosted URL

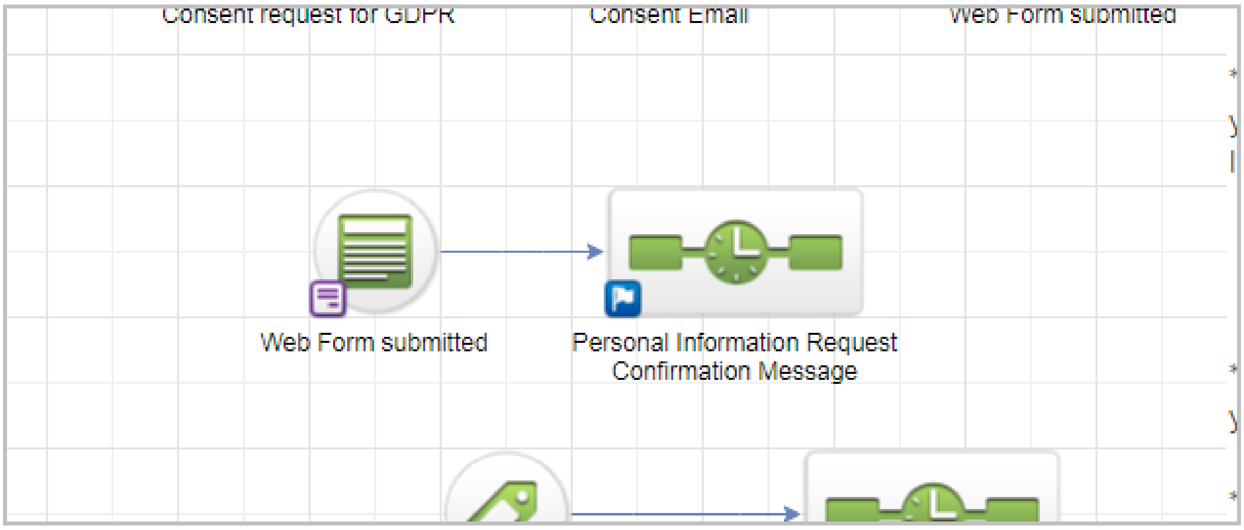


6. Go back to the consent email and update the button link with the link to your new GDPR web form using the link you just generated.



The second section is a data request form. According to GDPR, if you store the personal data of someone living in the European Union, you must include an easy way for them to request access to review and make changes to the data. They may want to request access to see their data in your system, they may request that you update or change their personal data or they may ask to be deleted from your system entirely. This form helps you automate those requests. If someone submits the web form, you will receive a task and email notification to let you know who made the request and the details of that request.

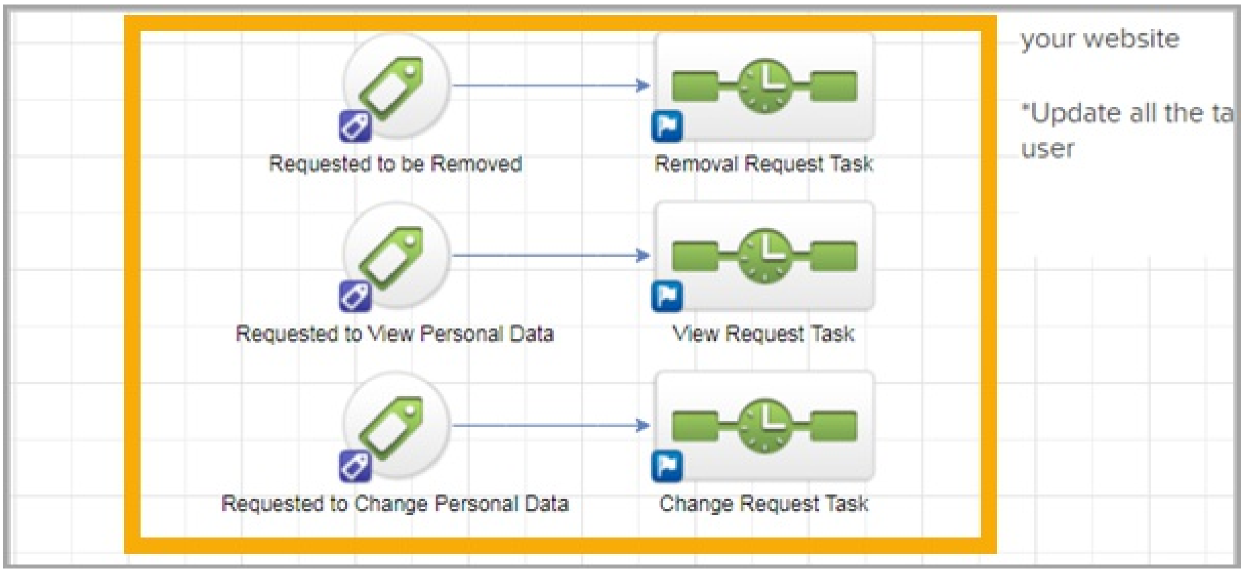
1. Open the web form goal.



2. Make any changes to the design of the web form and thank-you page.

3. Click on the **Code** tab at the top and grab the hosted URL (like you did previously) Add a link to this URL on your website somewhere. For example in the "About Us" or "Contact Us" section of your website.

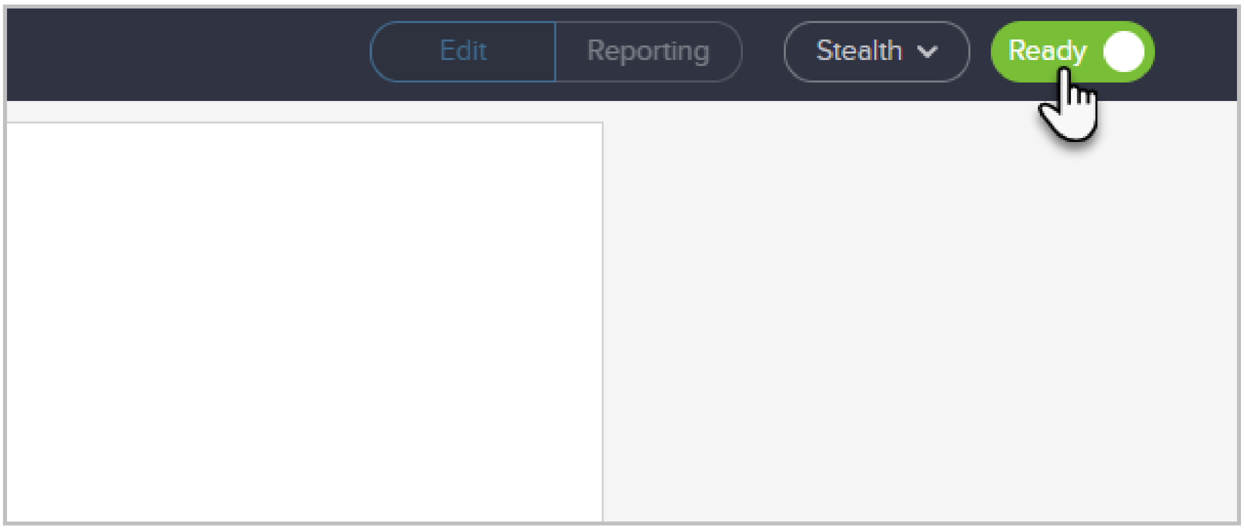
The final section are simply tags that you can apply to a contact manually that create a task for you to do something. For example, someone may email are call you and make a request, you can tag their contact record based on their request.



Here are your action items for this section:

1. Open each of the tasks in the sequences and make sure a backup is assigned.

2. Make each task as **Ready**



3. Your last step is simply to click the **Publish** button to make everything live.

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GDPR Summary

Last Modified on 08/02/2018 2:23 pm MST

- Watch the GDPR Webinar
- View the GDPR Readiness Guide
- View the GDPR FAQ Guide
- Enable GDPR Settings in your app
- After enabling GDPR, learn how to anonymize a contact
- Install the GDPR Helper Campaign
- Add a Privacy Policy to your website
- Create some new GDPR tags to start tracking "lawful basis"
- Learn how to apply a tag to a contact
- Learn how to apply a tag to a list of contacts
- Learn how to add a GDPR checkbox to a web form and landing page
- Tag successful purchases with a "lawful basis" tag
- Prune your database for EU contacts that have not given consent

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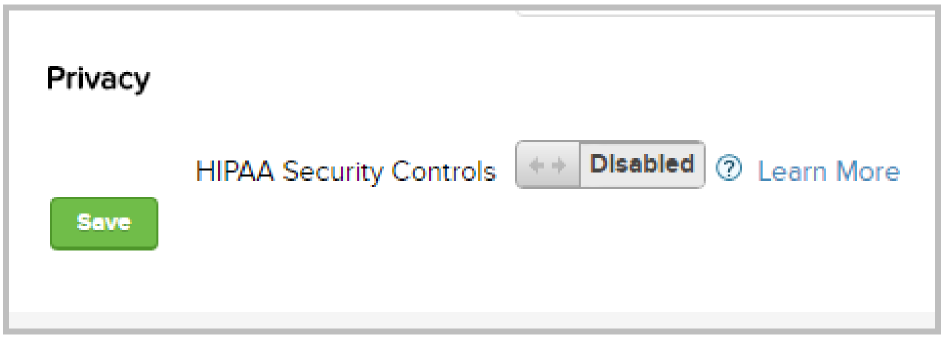
HIPAA Security Controls

Last Modified on 09/18/2018 12:40 pm MST

Introduction

The HIPAA Security Controls toggle button is used to indicate to Infusionsoft that your business is regulated by HIPAA and that your Infusionsoft app contains Protected Health Information (also known as "PHI".) It should only be activated if you are regulated by HIPAA. This setting is located in **Admin** > **Settings** > **Privacy & Compliance**.



Important Note! While HIPAA is a U.S.-only regulation, it is difficult for us to effectively identify all of the operating territories of our customers, so this toggle will display for all Infusionsoft accounts.

By default, the toggle is set to have the HIPAA controls Disabled.

When you toggle on HIPAA Security Controls, it can only be disabled again by contacting Infusionsoft Support. An Advanced Support team member will process your request. (To avoid accidentally enabling this security control, you will have to double confirm before saving it as Enabled.)

Vendors that Infusionsoft contracts to provide overflow and after-hours support are not yet HIPAA compliant and cannot be granted access to an Infusionsoft account that contains PHI. This means that your account will be supported only by in-house Infusionsoft Support during regular business hours.

Enabling HIPAA Security Controls in Infusionsoft does not make your business HIPAA compliant. It does, however, make it technologically possible for you to be compliant in the future as we continue to roll-out this feature.

The Infusionsoft HIPAA Business Associate Agreement Addendum (BAA)

Infusionsoft offers customers the opportunity to execute our standard Business Associate Agreement Addendum (or “BAA”) that satisfies the applicable subcontracting requirements under HIPAA and the HITECH Act. Before using Infusionsoft in support of your HIPAA compliance, be sure to do the following:

1. Configure your Infusionsoft app as a HIPAA app by enabling the HIPAA Security Controls. This setting is located in **Admin > Settings > Privacy & Compliance**.
2. Once the HIPAA Security Control is enabled, review the BAA below, complete all the required fields, and sign the BAA in accordance with the instructions.
3. Be sure to confirm your email address after you sign. To do this, follow the instructions in the email you receive from Adobe® Sign. This verification email will be sent to the email address you specify when signing the Addendum. If you don't see the email in your inbox, be sure to check your spam folder.
4. A fully executed copy of the BAA will then be emailed to both parties.

To review the BAA, click here .

HIPAA FAQs

Q: What is HIPAA?

A: The Health Insurance Portability and Accountability Act (HIPAA) is a federal law that sets baseline privacy and security standards for medical information. Click here to learn what types of businesses are regulated by HIPAA.

Q: What is a Business Associate?

A: People and companies that are hired or contracted by HIPAA covered entities. Infusionsoft is a business associate for our small business customers that are covered by HIPAA and have signed the Infusionsoft Business Associate Agreement Addendum.

Q: Is Infusionsoft HIPAA Certified?

A: There is no such thing as "HIPAA Certified", but the Infusionsoft software application is compatible with HIPAA, and Infusionsoft complies with HIPAA as a business associate as described in our BAA.

Q: I need advice on how to comply with HIPAA. What should I do?

A: Infusionsoft can't provide any interpretation of HIPAA as it pertains to a customer's particular circumstances. If you need help with HIPAA, consult a qualified attorney or legal adviser.

Q: Once I sign the BAA, does that mean I'm automatically HIPAA compliant?

A: HIPAA compliance is complicated, and the act of enabling HIPAA Security Controls in your Infusionsoft app does not alone make your business HIPAA complaint. But Infusionsoft is a HIPAA compatible application and can be used by organizations that are regulated by HIPAA to store, transmit, and otherwise process PHI.

Q: What about CustomerHub and third-party apps and services that integrate with Infusionsoft? Are those products and services HIPAA compatible too?

A: CustomerHub is not HIPAA compatible. Other Marketplace vendors may or may not offer HIPAA compatible solutions. Be sure to check directly with your Marketplace vendors – the Infusionsoft BAA does not cover your use of third party products or services.

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Sales Pipeline Overview

Last Modified on 08/02/2018 2:26 pm MST

A sales pipeline defines a typical step by step process that sales reps go through to convert a prospect into a paying customer. A sales stage is created for each step in the sales process. The sales rep is responsible for moving the stages as the prospect's interest level changes. The number of sales stages will vary based on the length of your sales cycle and the number of interactions needed to close a deal.

Example Sales Pipeline Stages:

- New Opportunity: Assign a stage like this when a lead is automatically or manually created.
- Qualifying: Assign a stage like this when the sales rep begins contacting the prospect to gather details about the prospect and their level of interest.
- Demo: Assign a stage like this when the prospect agrees to a demo, a free trial, an in person meeting, etc. Use a name that accurately describes the nature of the stage.

- Proposal Pending: Assign a stage like this after the sales rep issues a quote, proposal or estimate.
- Negotiating: Assign a stage like this after the prospect responds to a proposal, but requests some changes before committing to a purchase.
- Won: Assign a stage like this after the Prospect makes a purchase.
- Delayed: Assign a stage like this if a Prospect is qualified and truly interested in your product, but their decision-making timeline has been delayed.
- Lost: Assign a stage like this when the Prospect purchases from a competitor or decides they are no longer interested in your product.
- Unable to Contact: Assign a stage like this when the sales rep is not able to connect with a Prospect.

Prospects enter the sales pipeline when an opportunity record is created in Infusionsoft, either manually or automatically. From that point on, the sales rep guides the prospect through the sales stages. This is not necessarily a linear process where every prospect goes through every stage. Instead, it is a framework for making the sales process more systematic and standardized. All of your sales reps are following the same basic process, which makes it easier to train new sales team members.

Pipeline Automation

Because you are using Infusionsoft to manage your sales pipeline, you can set up actions that trigger when a sales rep updates the stage for an opportunity. This allows you to create strategic automated follow up that is appropriate based on the prospect's stage and to control the messages that are sent. The actions may include creating a task, starting a follow-up sequence, sending one email, and more.

In the example above, an action could be set up to trigger when the prospect moves into the proposal pending. The action might trigger a follow-up sequence that includes a series of 3 to 5 emails from the sales rep following up to make sure that the prospect received the proposal and to offer to answer questions, discuss other options, schedule another meeting, etc. The spacing of the emails will depend on how long it generally takes a prospect to respond to a proposal. Usually they are several days apart and are sent out over a 2 to 3 week period.

You might also set up an action for the delayed stage. This sequence could include a series of emails from the sales rep that maintains the relationship with the prospect until they are ready to engage again. The emails in a sequence like this are usually spaced farther apart, but it may span a longer period of time. The emails might include links to interesting blog articles from your company website, links to web pages that have free resources, etc.

Map out your company's typical sales process by observing your most successful reps. Identify actions for each stage, then set up your sales force automation processes in Infusionsoft.

Customized Sales Pipeline Stages

When a prospect moves through your sales funnel, your sales team needs to keep track of their status. You can set up custom sales stages to organize opportunities and help your sales team prioritize their manual follow up. Sales reps also need to know the history of their interactions in order to be efficient and to make a strong connection with prospects. Infusionsoft's Opportunity component keeps track of where prospects are in your sales cycle, what's been done in the past, and what needs to happen in the future (e.g., follow-up phone calls, special offers, etc.) You define sales stages based on your company's standard sales process and lead categorization - they are completely customizable.

Sales Triggers

As sales reps move prospects through your custom sales stages, Infusionsoft can automatically trigger actions that change the prospect's follow-up messages. This allows you to send follow-up sequences, special offers, and reminders that apply to each stage of the process. Sales automation can be integrated with a marketing campaign to provide you with an overall picture of your sales and marketing strategy.

Reporting and Forecasting

The tracking functionality of the Opportunity component provides you with data and reports to evaluate sales performance and forecast future sales. This information can help you manage lead flow, distribute new opportunities, and optimize your entire sales process.

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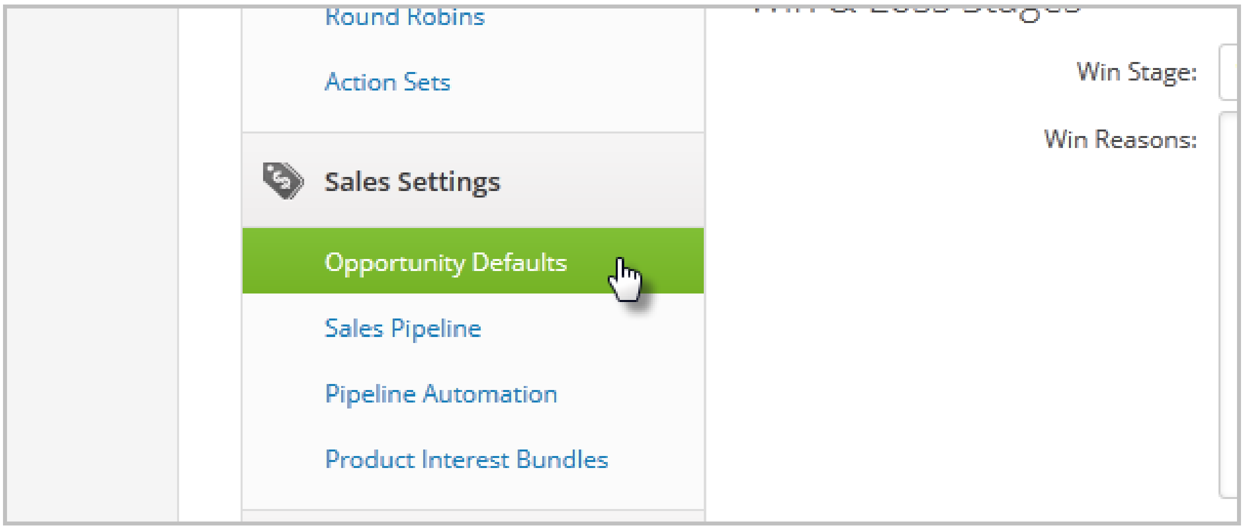
Sales Pipeline And Opportunity Settings

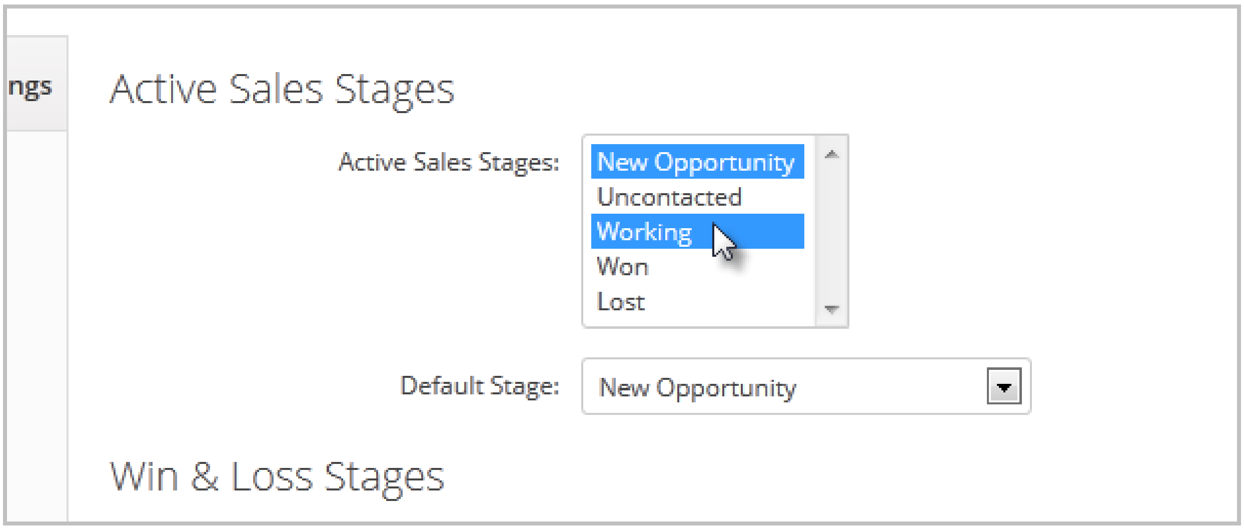
Last Modified on 08/02/2018 2:27 pm MST

The sales pipeline defaults determine how Infusionsoft behaves when an opportunity is created automatically. An active stage is one where a sales rep is engaging with the prospect and you want to protect the "lead" for that sales person. Defining active sales stages gives you the ability to prevent a duplicate opportunity from being created and assigned to another sales rep.

1. Go to **CRM > Settings** in the main navigation menu
2. Click on **Opportunity Defaults** in the Settings menu.



3. Active Sales Stages



- **Active Sales Stages:** Hold down your Ctrl key and click on the names of the active sales stages. The active stages are used as criteria for automatically creating a new opportunity. This setting will prevent a duplicate active opportunity record from being created and assigned to a different sales rep.
- **Default Stage:** This stage will appear in the *Put In Stage* field by default, however, you can change this when setting up your automated sales pipeline campaign.

4. Win and Loss Stages.

Tracking the reasons prospects do or do not buy from you will help you refine your sales and marketing strategy. It will enable you to proactively address common objections (loss reasons) and reinforce your strengths (win reasons) throughout the lead nurture and conversion process. It can also help you collect intelligence that can lead to product and /or service changes that will make your company more attractive than your competition. The win/loss data is stored in individual opportunity records and

can be used in opportunity searches (CRM > Opportunities.)
Select your *Win* Stage from the drop-down and enter a list of known Win Reasons (you can add more later.)

(Optional) Select **Yes** to require a win reason when a sales person moves the opportunity to the Won stage. When a sales rep moves an opportunity record to this stage, the win reasons will show up in the opportunity record. If you require a win reason, the sales rep won't be able to save the opportunity until they select a reason from the list.

Select the *Loss* Stage from the drop-down and enter a list of known Loss Reasons (you can add more later.) Select *Yes* to require a loss reason when moving the opportunity to this stage.

5. Viewing Opportunities
   You can set up sharing rules that will refine a user's ability to view contact records and opportunity records. The user who "owns" the contact record may be different than the sales rep assigned to an opportunity for that person. These rules determine how those records are shared when this is the case. These are set to *Yes* by default, but you can change these defaults.
   - **Assign to group**: This controls the user list that shows up when a new opportunity is created. In most cases, this should be the sales rep group.
   - **Share Contact When Shared**: This setting automatically enables a user's ability to view a contact record that they don't "own" when an opportunity for that person is shared with them.
   - **Share Contact When Assigned**: This setting automatically enables user's ability to view a contact record that they don't "own" when an opportunity for that person is assigned to the user.
   - **Unshare Contact When Unshared**: This setting automatically disables a user's ability to view a contact record when they can no longer view any opportunity records for that person (the opportunity record is unshared.)
   - **Unshare Contact when Unassigned**: This setting automatically disables a user's ability to view a contact record when they are no longer assigned to any opportunity records for that person (the opportunity record is reassigned.)
   - **Sync Opportunity and Contact Owners**: This setting automatically changes the contact record owner when a new opportunity record is created. The sales rep who is assigned to the opportunity will become the owner of the contact record too.
   - **Sync Owner of Closed Leads**: This setting works in conjunction with the sync opportunity and contact owners setting. In addition to reassigning the contact record to the sales rep, it will also reassign all of the old, closed leads to that user.

6. Buy Now
   There are several *buy now* link default settings you can configure to streamline the order processes and to trigger automation.
   - **Buy Now Default Expire Days**. The number of days you enter here will be the default for every buy now link, but the sales rep can change this from the products/subscription Interest tab in an opportunity record.
     Select a Buy Now Shopping Cart Skin. This defines the look and feel of the shopping cart prospects see when they purchase through a buy now link.
   - (Optional) **Buy Now Win Reason**. This reason will be assigned to an opportunity record automatically when a prospect purchases.
   - The *buy now* link is a trigger. Click on the Actions button to automate something when this happens.
     - **Clicked Buy Now**: You might use these actions to apply a tag (e.g. Buy Now Click) and send an email to notify a sales rep that the buy now link was clicked.
     - **Purchased via Buy Now**: You might use these actions to apply a tag (e.g. Buy Now Purchase) and send an email to notify the sales rep that the customer purchased. You might even trigger a follow-up sequence specific to people who clicked on the buy now link.

7. Click **Save**

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Create Sales Pipeline Stages

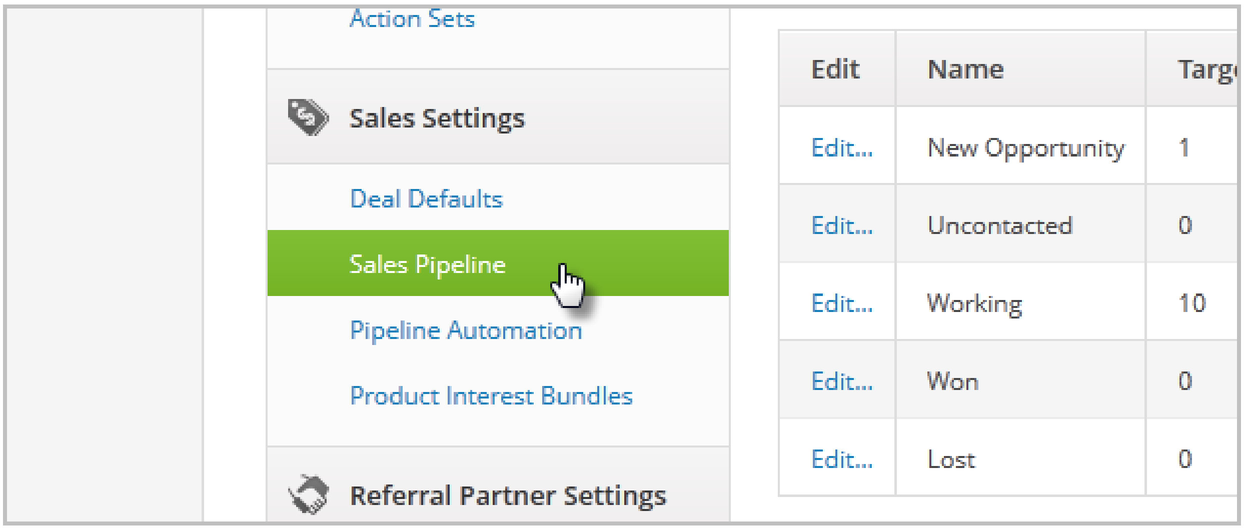
Last Modified on 08/02/2018 2:27 pm MST

Infusionsoft has predefined sales pipeline stages, based on a typical direct sales process. You can customize these stages to align with your direct sales process. Each stage can be integrated into a sales and marketing campaign.

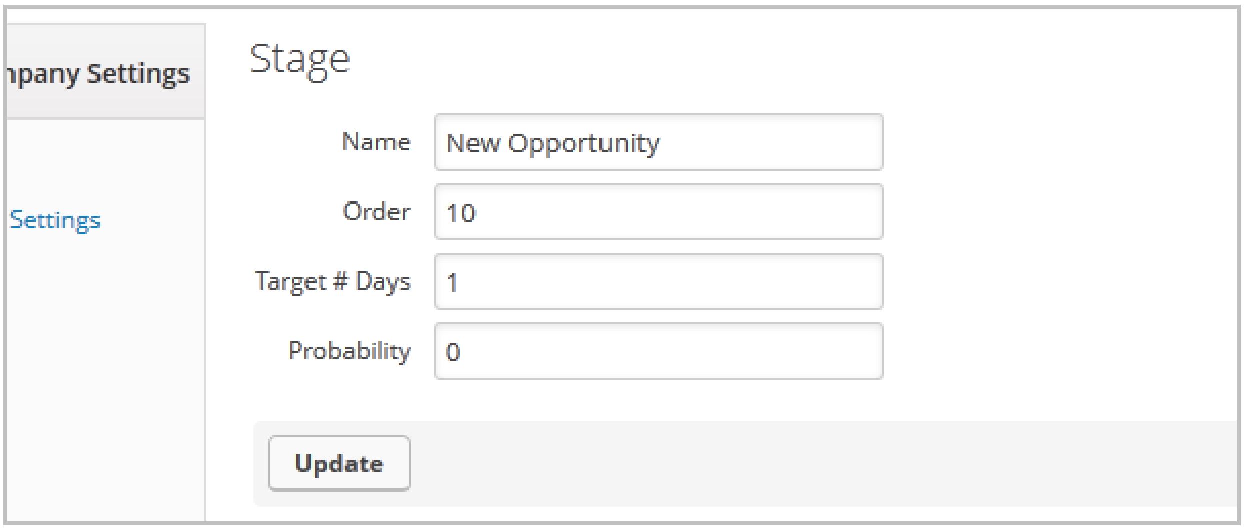
Sales reps will move the sales stage manually as a prospect progresses through the sales process. When a rep moves the stage, the sales campaign will automatically update tags and/or follow-up messages. Sales managers will use the stages to track sales rep effectiveness and evaluate overall sales team performance. Tap into your top sales team members to define and standardize your sales stages and identify what type of automation makes sense during each stage.

1. Go to **CRM** > **Settings** in the main navigation menu.

2. Click on **Sales Pipeline** in the *Settings* menu.

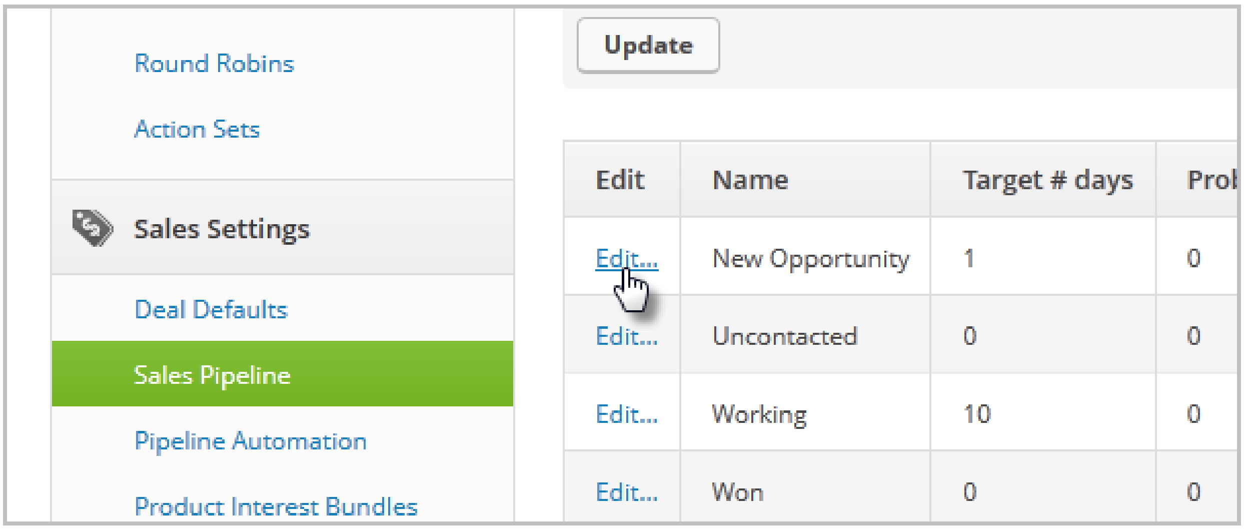


3. Review the list of default stages.

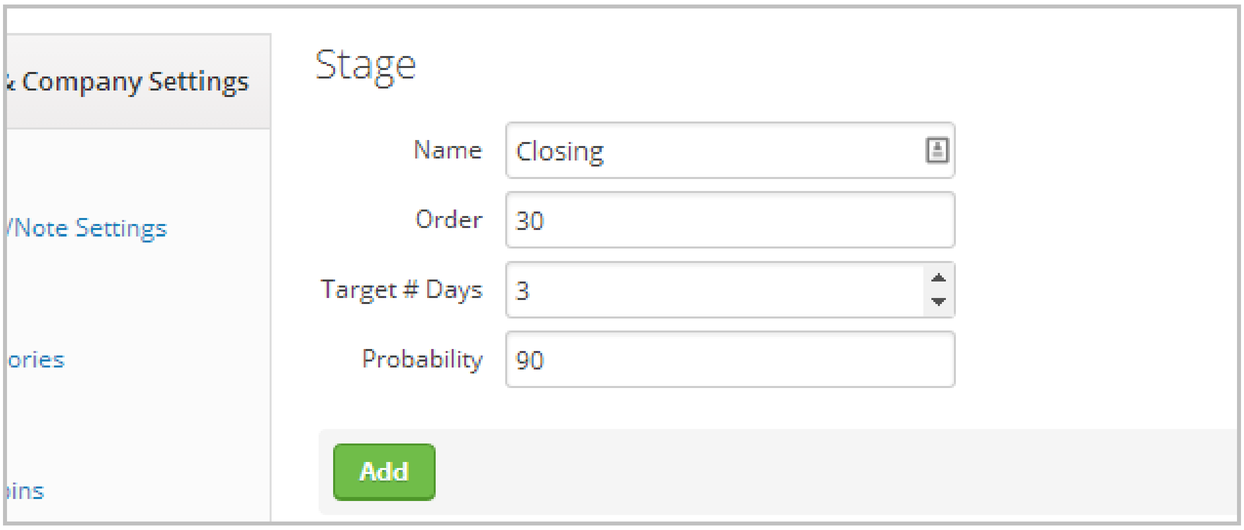


- **Name**: This is what your sales team will see in the opportunity record.
- **Target # Days**: This number represents the max number of days you typically want a prospect to remain in the stage. It shows up in the opportunity record and can be used as search criteria when searching opportunity records.
- **Probability**: The probability is a percentage that reflects the number of deals that turn into sales when a prospect reaches this stage. If 4 out of every 5 prospects purchase once they reach a certain stage, then the probability of making the sale for that stage is 80%. The probability is used to calculate the weighted revenue in the opportunity revenue forecast sales report. This is a very important field if your goal is forecasting.
- **Order**: This number is used to set up the order for the stages in the opportunity record drop-down. Increment by multiples of 10 at first, so that you can insert new stages between the existing stages. The stages with a lower order number show up higher on the list.

4. Click on **Edit** next to a stage name to customize it.



5. After you finish updating the default stages, start adding new stages by entering a name, order number, target # days and probability. You can insert a sales stage between other stages by assigning it an order number between the existing stages' order numbers.



6. Click the **Add** button to add the new stage.

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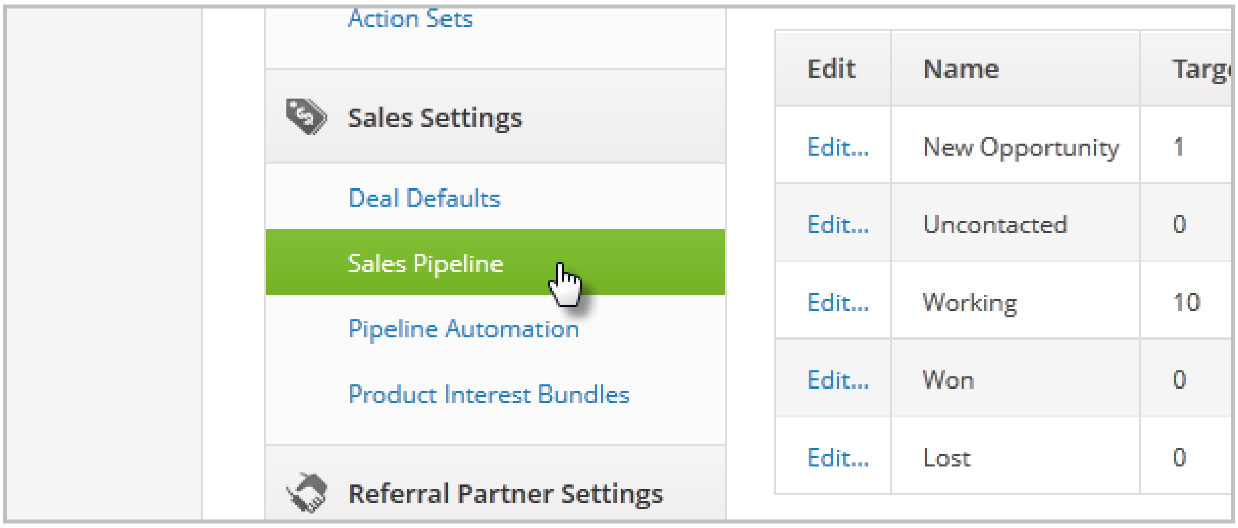
Set Up The Pipeline Checklist

Last Modified on 08/02/2018 2:27 pm MST

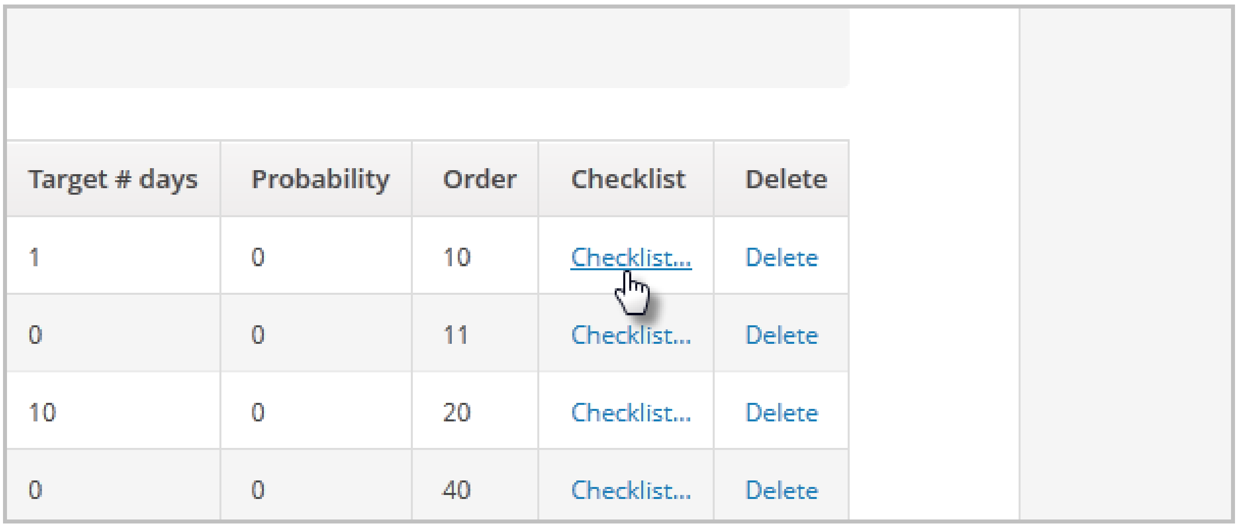
When a sales rep moves a stage in an opportunity record, it can initiate automation. However, there may be specific goals, tasks, or talk topics related to each specific stage. The sales rep must be aware of or complete these items, but they do not represent a significant milestone in the sales process.

You can assign a checklist to each sales stage to help sales reps track their "to-dos" and to require reps to complete certain tasks before moving the stage. Note: Checklists are NOT triggers (they do not initiate automation) and are not available as criteria in searches and reports.

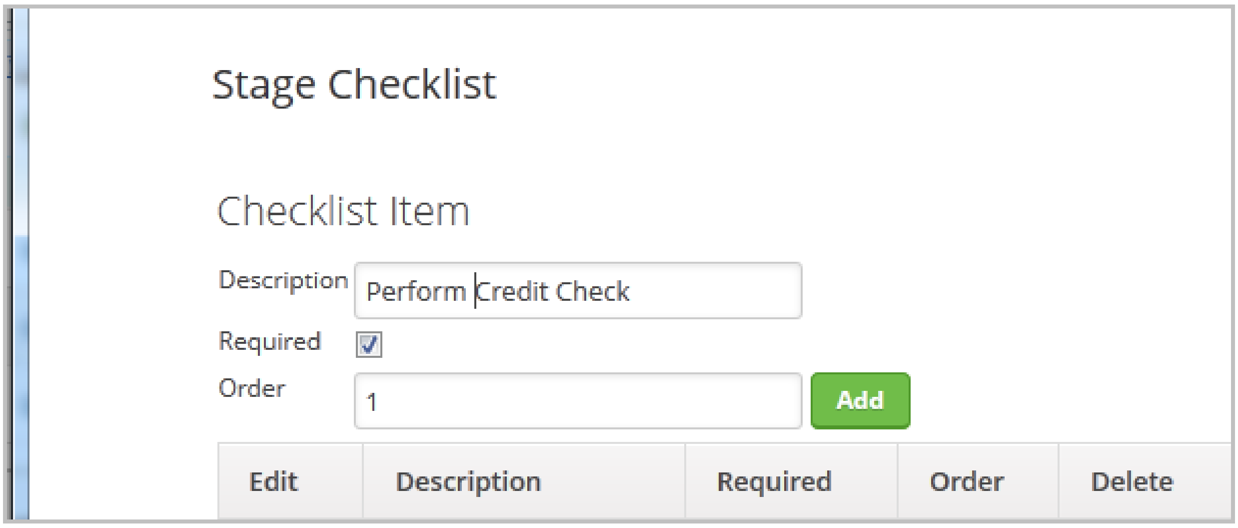
1. Go to **CRM > Settings** in the main navigation menu
2. Click on **Sales Pipeline** in the settings menu



3. Click on the **Checklist** link beside a stage to create a new checklist or edit an existing one.



4. Add items to the checklist.



- **Description:** The description shows up in the opportunity record when the stage it's assigned to is selected from the stage drop-down.

- (Optional) **Required:** Mark this checkbox for required tasks / goals. The sales rep will not be able to move the sales stage until they mark all required items as completed. Skip this for recommended or optional items.**Order:** This number is used to set up the list order for the checklist within the stage. Increment by multiples of 10 at first, so that you can insert new checklist items between the existing items later.

5. Click on the **Add** button to save the checklist item.
6. Repeat this process to add additional checklist items for this sales stage.
7. Close the pop-up window.
   Repeat this process to add additional checklist for additional sales stages.

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Stage To Stage Pipeline Automation

Last Modified on 08/02/2018 2:28 pm MST

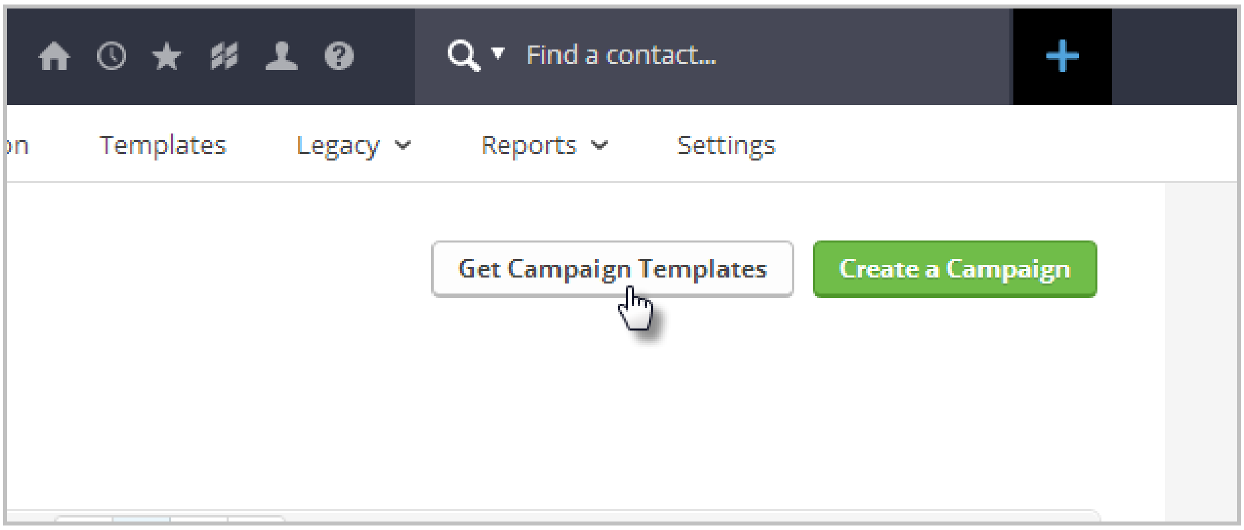
When a sales rep moves the stage in an opportunity record, Infusionsoft can initiate automation that updates tags, sends an email to the prospect, starts a new campaign sequence, sends internal notification messages, assigns tasks to other users, and more.

You can attach actions to movement INTO a specific stage, or OUT OF a specific stage. When you plan the marketing automation strategy for your direct sales process, ask yourself:

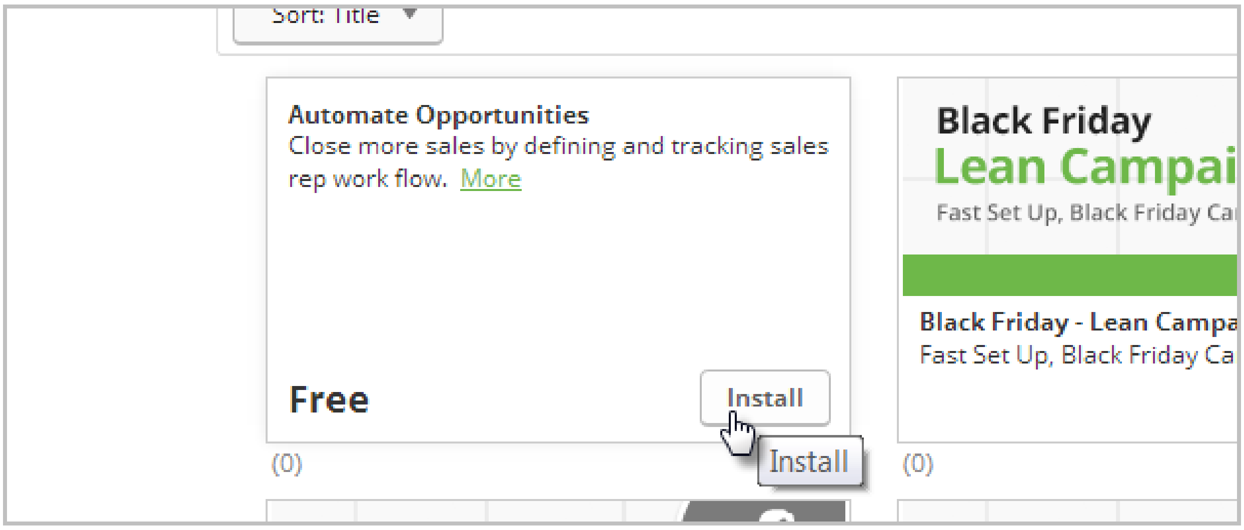
- Is this series of actions specific to the newly assigned stage? If the answer is yes, then you will want to assign the action to the movement INTO that stage.
- Is the action appropriate regardless of the next stage? If the next stage is irrelevant, then you will assign the action to the movement OUT OF the stage. This is less common.

1. Go to **Marketing > Campaign Builder** in the main navigation menu

2. Click **Get Campaign Templates.**

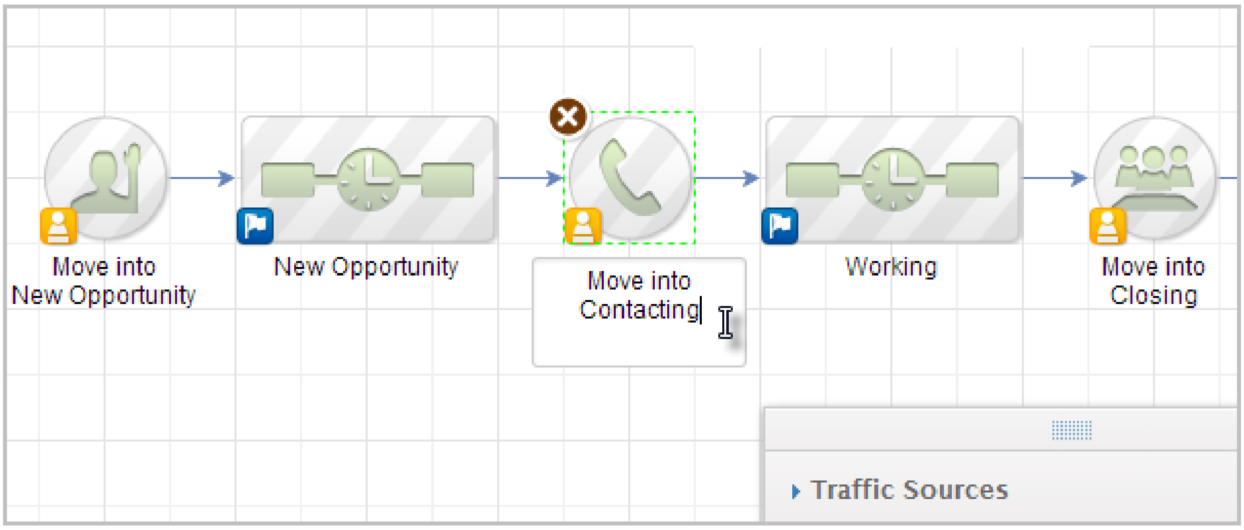


3. Find the *Automate Opportunities* campaign and Install it.

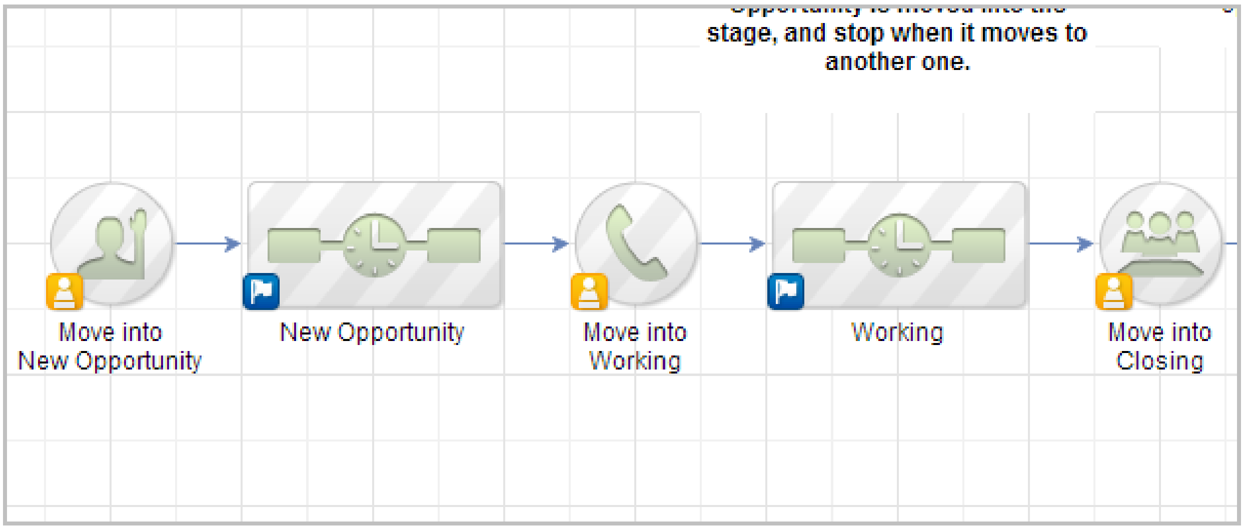


4. This campaign starts when an opportunity is moved into the *New Opportunity* stage.

   Note: Your stage names may be different, so be sure to double-click on the opportunity goals and change the stage drop-down to the appropriate stage. You can also change the description below the goal to match your stage names

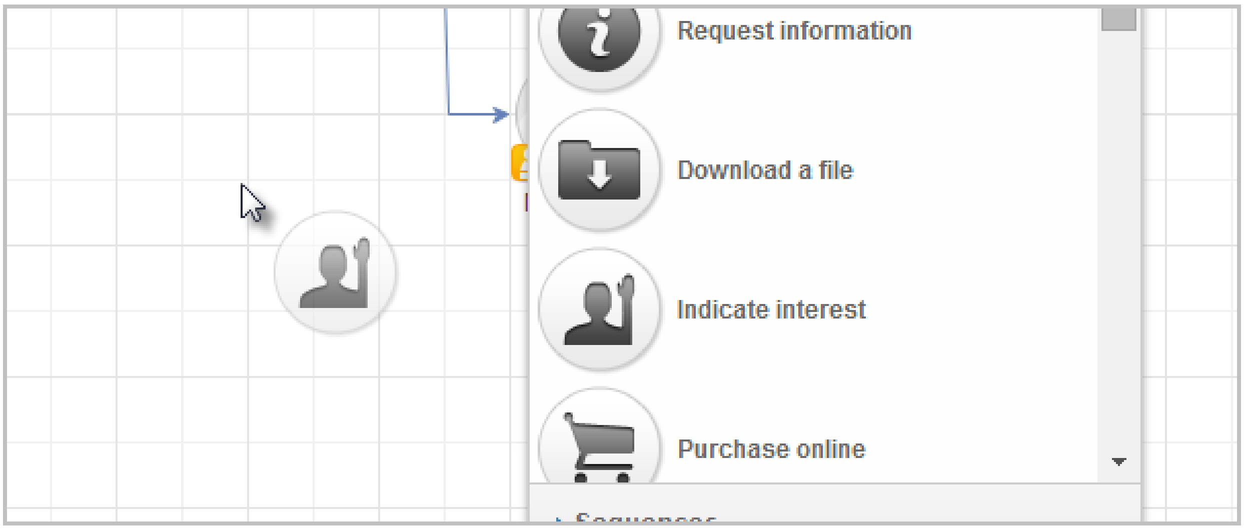


5. Note how each stage change has a corresponding campaign sequence that automates follow-up and other business processes.

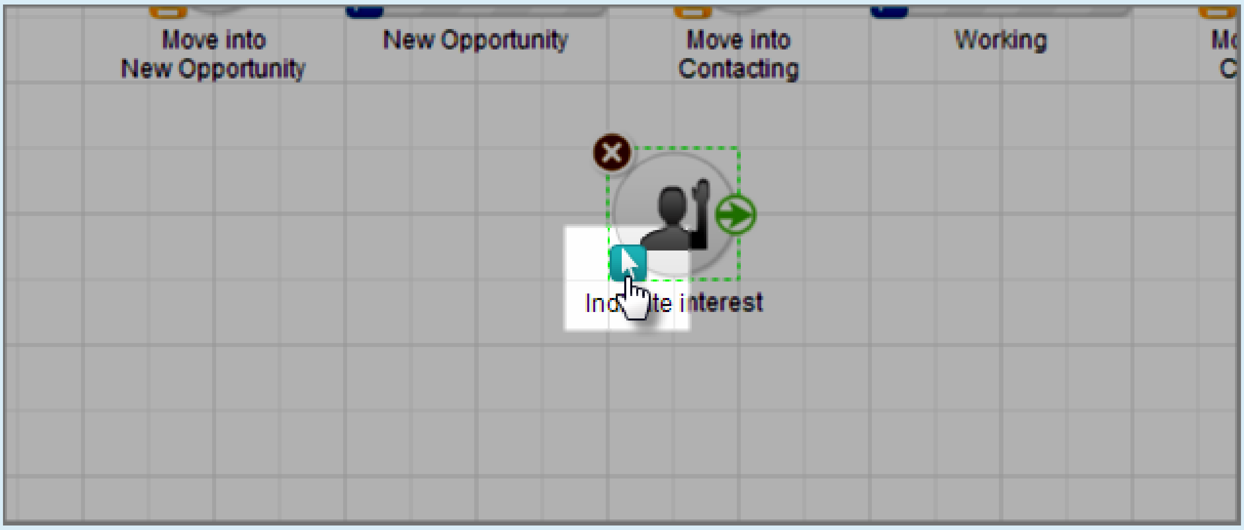


6. You can add more stage goals and campaign sequences to flesh-out your sales process.

7. Just drag a goal or campaign sequence onto the campaign builder canvas.



Goal Type:
You can drag any goal icon from the side panel, just click the goal type icon and change it to **Moves an Opportunity**.



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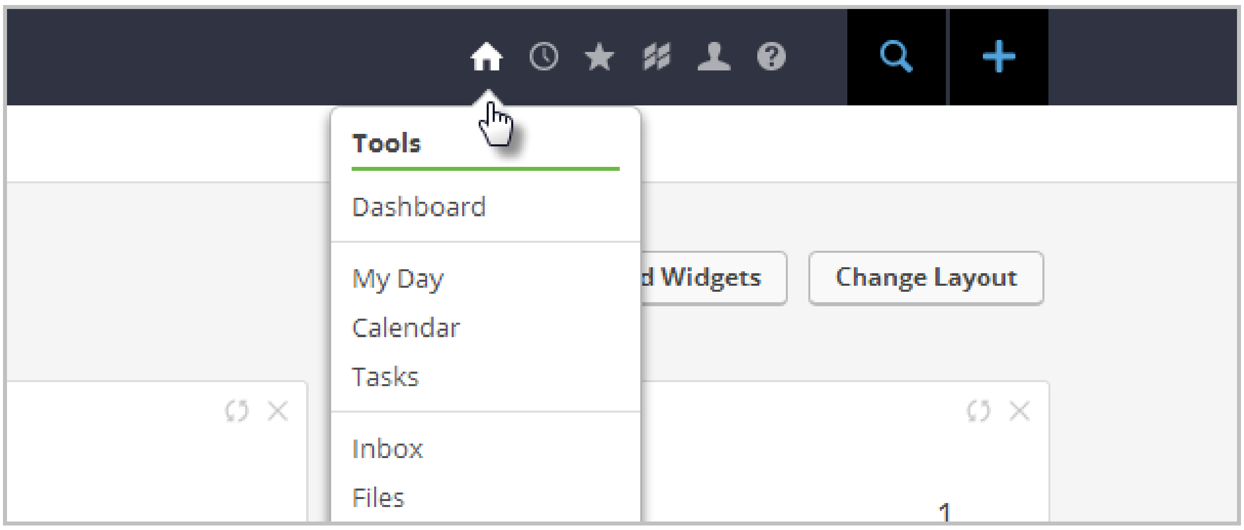
Sales Pipeline Dashboard

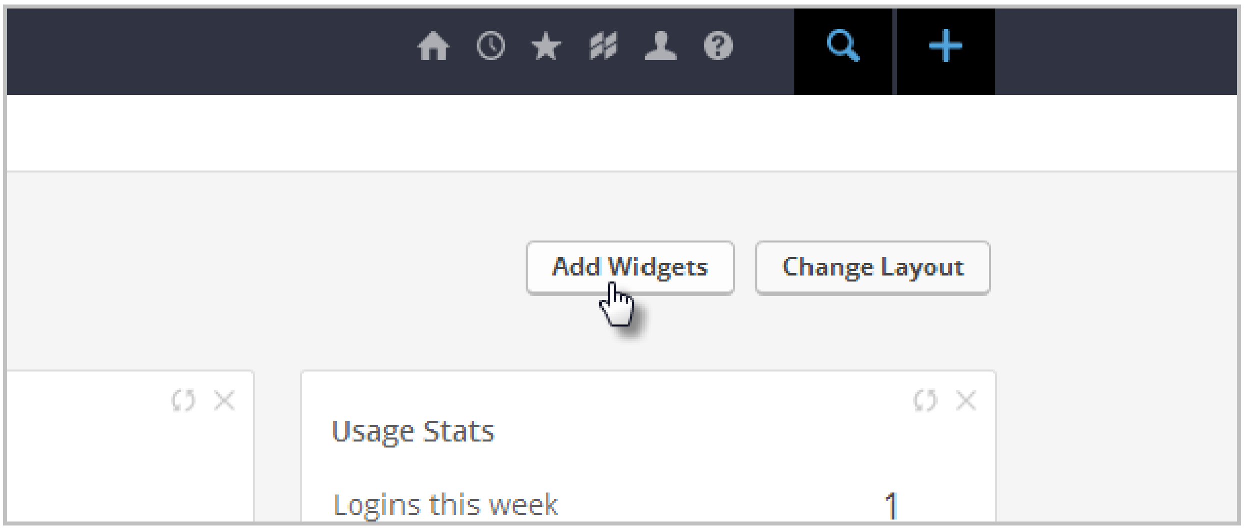
Last Modified on 08/02/2018 2:28 pm MST

Each sales person can add the Pipeline Stages widget to their dashboard and select which stages they want to monitor.

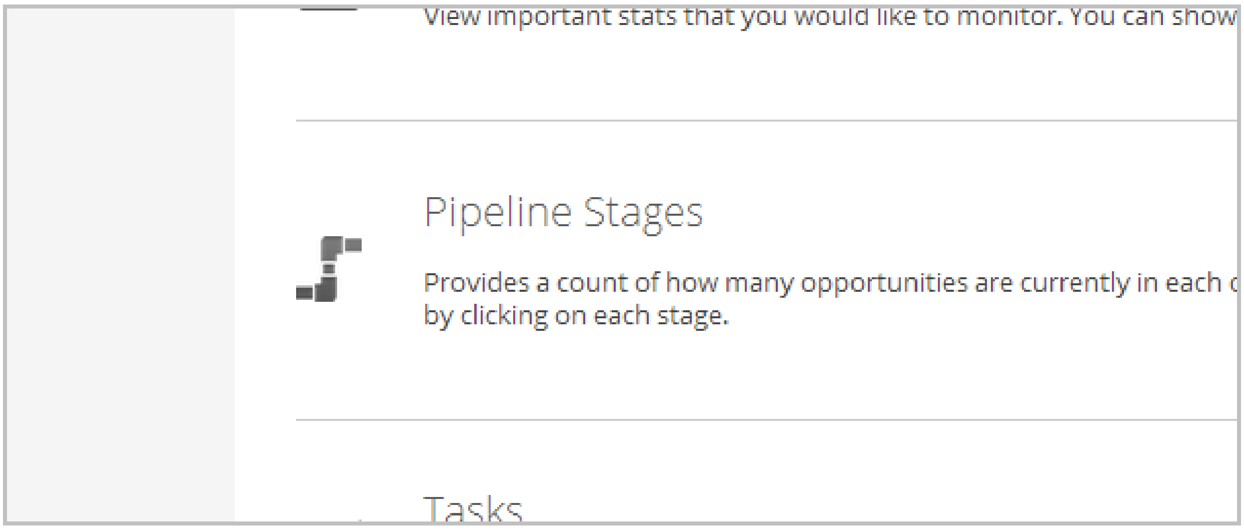
1. Go to your dashboard by clicking the **home** icon button on the toolbar



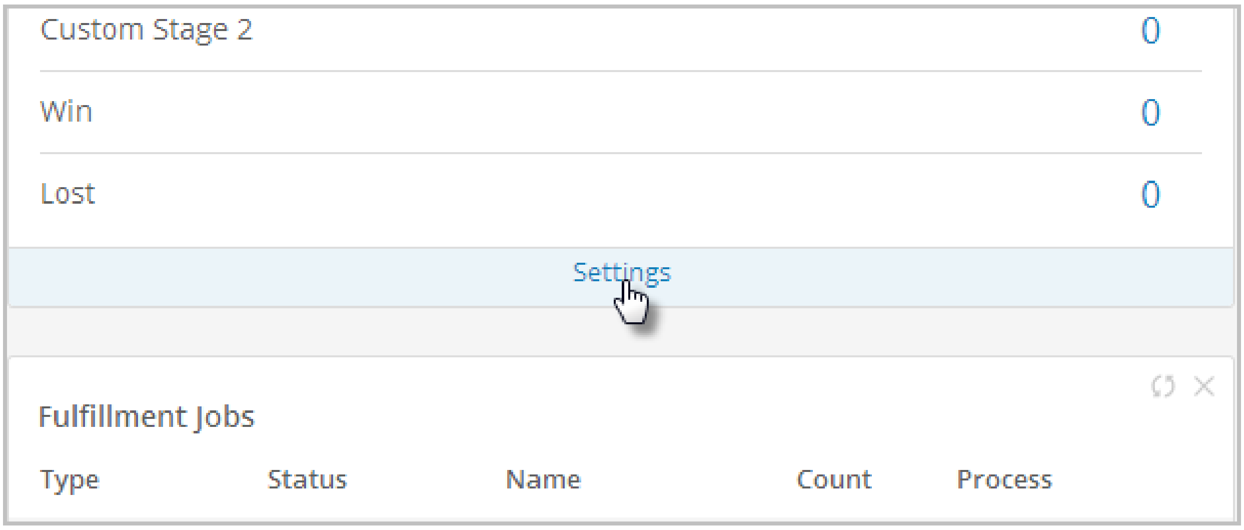
2. Click the **Add Widgets** button



3. Scroll down and click the **Add to Dashboard** button next to the Pipeline Stages section



4. Once the widget is on your dashboard, you can click **Settings** to select or deselect stages you want to monitor.



Multiple Pipelines

You can add multiple pipeline widgets to your dashboard if you have separate sales processes for different products and services.

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Trigger Sales Automation Without Moving A Stage

Last Modified on 08/02/2018 2:28 pm MST

Sales stage movement is a great way to trigger predictable, standard actions that do not differ based on the individual prospect. However, there may be events that occur during the sales process that are not predictable and require some human discernment or interaction. You can set up note templates to trigger automation for these types of events. The sales rep will add the note template to a contact record manually. The note template will show up under tasks in the bottom row of tabs and will kick off automation (actions) when it is used. Use note templates in conjunction with sales stage triggers to fully automate your sales process.

Example: Your sales team may encounter specific objections while working with a prospect. The opportunity record may be in the "working" stage, but the sales rep needs to be able to track the objection and send a specific follow-up sequence that speaks to a particular objection. If the prospect hesitates because of price, the follow-up sequence will remind the prospect of the value they'll receive for the price and reinforce the value through your existing customer stories and testimonials.

You may need to create multiple note templates for your sales team. Use a naming convention to make it easy for a sales rep to find the right one (e.g. Sales Objection Price). The note template can apply a tag, start a follow-up sequence, and stop a follow-up sequence that is no longer relevant (and much more!)

You may also want to use note templates to track sales rep activity. The note templates show up on the Task/Appt/Note Report.

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Create An Opportunity Record

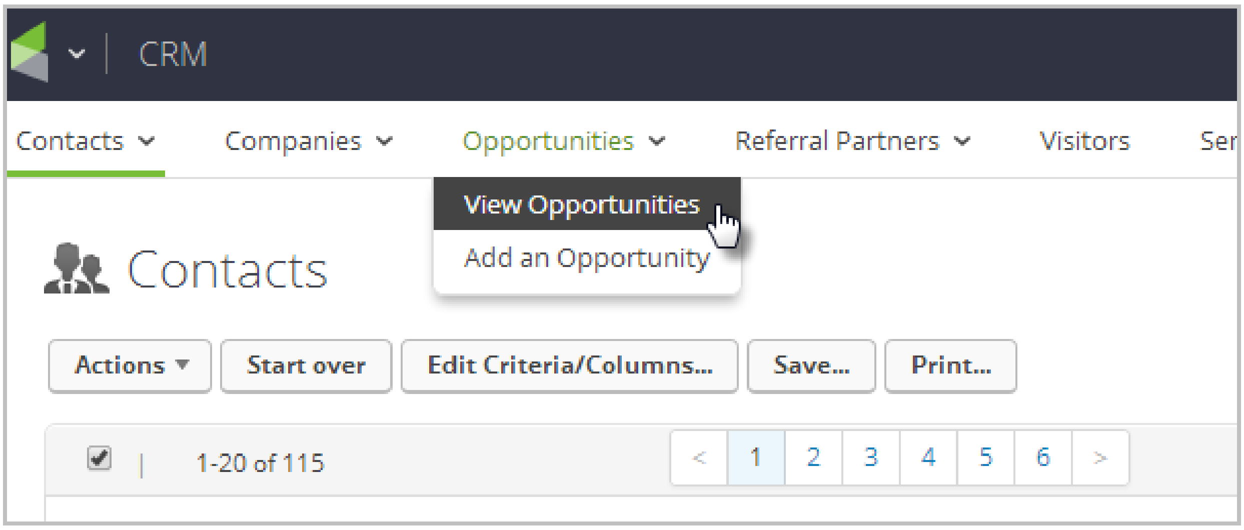
Last Modified on 08/02/2018 2:29 pm MST

An opportunity record contains the history of a single sales process with one prospect. They may be created automatically when a prospect fills out a web form, clicks on a link, etc. or be added manually after a personal interaction with a prospect. Opportunities are attached to the prospective buyer's contact record. Each contact record may have multiple opportunities (i.e. if a prospective buyer goes through your initial sales process more than once or if upgrades and repeat business are handled through your direct sales team, too.)

Before you create an opportunity record manually, you must make sure a contact record for the prospective buyer exists in your Infusionsoft application as a contact record.

1. Go to **CRM** > **Opportunities** in the main navigation menu.

2. Select **Add an Opportunity** from the *Opportunities* menu.



3. Enter the Opportunity Information
    - **Opportunity Title**: The opportunity title shows up in the list of opportunities. It can be a company name, a person name, a "deal" name, etc.
    - **User ID**: This defaults to the user adding the opportunity. Select a different user if it should be assigned to someone else.
    - **Stage ID**: The default Stage ID is defined in the sales settings, but you can change it when adding a new opportunity.
    - **Person**: Enter the prospect's name, and then click on the Search button to see possible matches. Click on a person's name to attach the opportunity to their contact record.
    - **Opportunity Notes**: Enter notes pertinent to this opportunity. These notes should include information about the prospect or the deal that you want to keep in mind when you follow up with the prospect (e.g. pain points, family info, etc.)
    - **Next Action Notes**: The Next Action Notes should tell you what type of follow up you need to do manually (e.g. Call back to schedule demo.)
    - **Next Action Date**: The Next Action Date tells you when you need to manually follow up with the prospect again. It could be a firm commitment or a general guideline.
    - (Optional) **Select a product interest bundle**: These product interest bundles are standard groups of products a prospect might commonly show interest in buying. If you select a bundle, the system will automatically populate the product/subscription Interests for the opportunity record.

4. Click the **Save** button to add the new opportunity.

Pro Tip! You can create opportunities from within a contact record. Just click the Opportunity tab (in the bottom row of tabs on a contact record) and click the Add Opportunity button.

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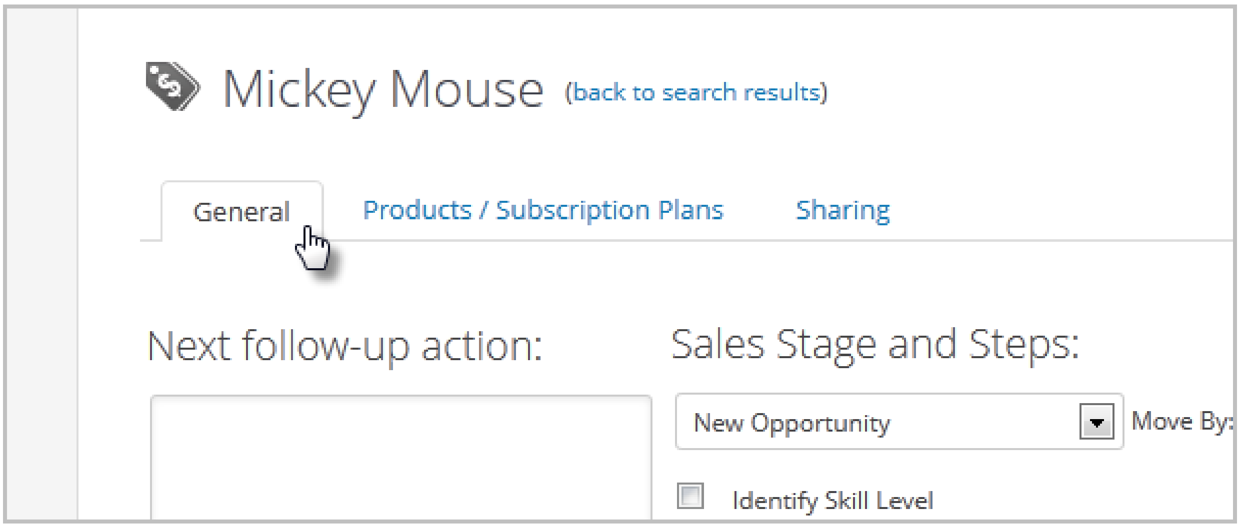
Opportunity Record Overview

Last Modified on 08/02/2018 2:30 pm MST

Opportunity Records are used to track a sales process. They are primarily used by companies that have direct sales reps who manually interact with prospects as they are making a buying decision. Each opportunity record stores the history for one complete sales process from the time a lead begins working with a sales rep to the time that the deal closes or dies; it stores notes, next action dates, stage, product interest, and more. You can use the information in opportunities to monitor sales rep performance and forecast future sales revenue. Opportunity records are attached to a prospect's contact record.

The Top Row of Tabs

The top row of tabs is the navigation between sections of the opportunity record.



- **General**: This is the first section displayed when you view an Opportunity Record. It displays current Opportunity Information, including the next action date and notes, the assigned sales rep, the current sales stage, opportunity notes, and more. The sales rep can quickly link to the prospect's Person Record or send an email from here.
- **Products / Subscription Bundles**: A sales rep can track specific product interest and special pricing by attaching products and / or subscription programs to an Opportunity record. When the prospect decides to purchase, the sales rep can quickly generate an order or "Buy Now" order link to make it easy for the prospect to buy.
- **Custom Field** Tabs: These are tabs you create when you add custom fields for Opportunity Records (Admin > Settings). Custom fields contain information sales reps need to track for each prospective deal (e.g. Launch Date). Each Opportunity record can have different information in these fields, even if they are attached to the same Person Record. You create the tab labels when you create the custom fields.
- **Sharing**: This tab allows a user to share access to an opportunity record with other users or user groups / teams.

The Bottom Row of Tabs

The bottom row of tabs stores the person's activity history and purchase transactions.

- **Tasks**: The Tasks tab displays pending and completed tasks, date stamped note history, email correspondence, and click history, etc. You can also add new tasks, appointments, notes, and send emails from here.
- **Sales History**: The Sales History tab displays a date stamped record of stage movement, number of days between movement, user who moved the stage, and the assigned user (the one who "owns" the opportunity.)
- **Follow-Up Sequences**: This tab shows the person's follow-up sequence history. The sequences that are active, paused and / or completed. Most of the time follow-up sequences are automated and require little to no intervention, but you can manually

manage sequences from here when needed.

- **Orders**: If you are processing orders through Infusionsoft, this tab will house the purchase history. You can also manually manage orders, payments, refunds, and invoices from here.
- **File Box**: Use Infusionsoft for online document storage by uploading contracts, estimates, questionnaires, and more to an individual's file box. The documents loaded from an opportunity are stored in the contact record file box.

Opportunity Actions

You can print a letter, print a label, send a buy now link, or create an order from the action drop-down in the opportunity record. When printing a letter, you will choose from your library of letter templates.

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Assign Opportunities With A Round Robin

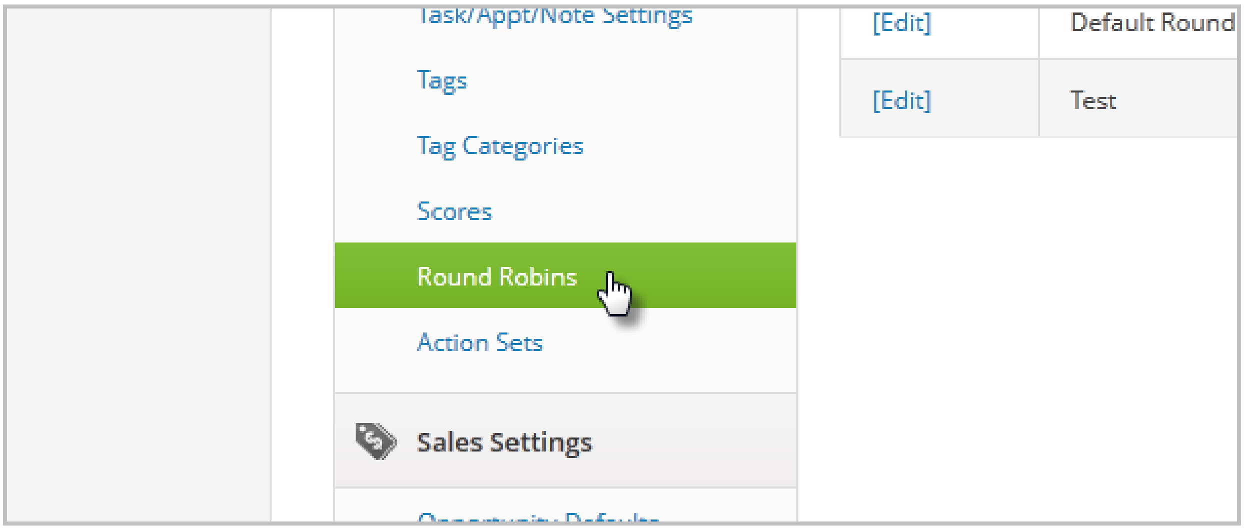
Last Modified on 08/02/2018 2:30 pm MST

A round robin is a set of distribution rules based on numeric logic. You can use a round robin to automatically assign users as owners of specific contact records, and to distribute new opportunities to your sales team. The round robin rules are most commonly used when setting up your Sales Funnel campaign in Infusionsoft; as new opportunities are created in your funnel, they are distributed evenly among your sales team.

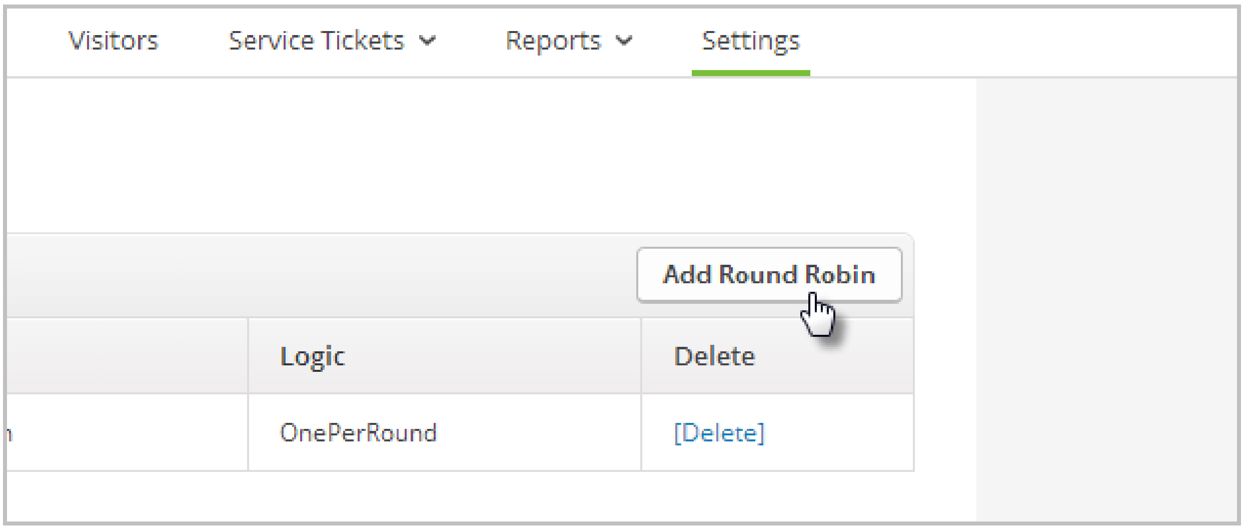
You can add multiple round robin rules and use them to vary the way you assign "owners" and distribute opportunities based on the lead type, lead source , product interest, and more.

1. Go to **CRM** > **Settings** in the main navigation menu.

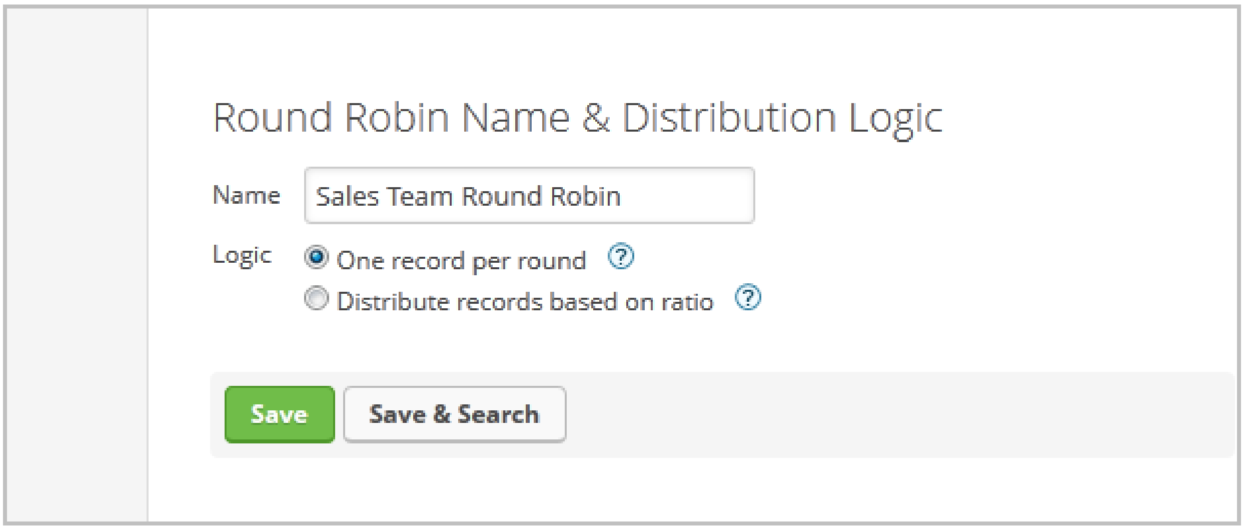
2. Click on**Round Robins** in the settings menu.



3. Click the **Add Round Robin** button.



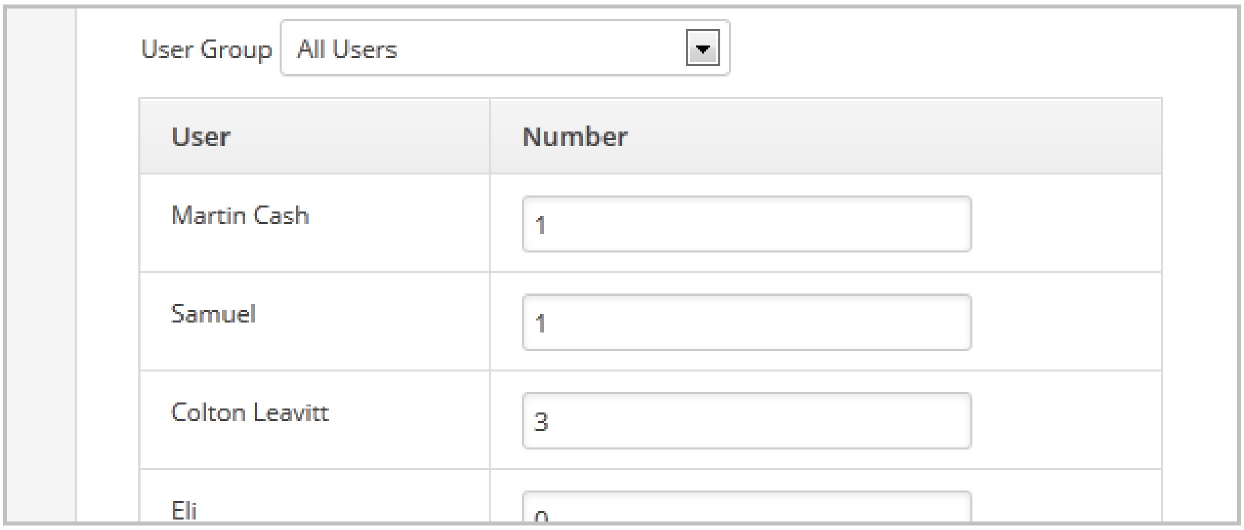
4. Enter a descriptive name for the round robin (e.g. Sales Team A) and choose a numerical distribution logic.



- **One Record Per Round:** Choose this option to assign each user one record at a time until they receive the full amount specified. This option distributes in a way that is more sequential and predictable.

  - **Distribute Records Based on Ratio:** Choose this option to assign records based pre-defined ratios. The user who is farthest from their maximum number of records receives the next one. This option distributes in a way that is more efficient, but it is not sequential or as predictable.

5. (Optional) Select a user group from the drop-down.



   This list includes the pre-defined system user groups and the custom user teams you've created. This filters the list of users so that only the users assigned to the specified group or team are included in the round robin.
6. Define the maximum number of records each user will receive during each round robin distribution cycle and click on the **Save** button.

Example Distribution Logic:

One Record Per Round

If you select One Record Per Round as the round robin distribution logic, the system will distribute records to Sales Team A as follows:

1 to Aaron / 1 to Amy / 1 to Jacob / 1 to Aaron / 1 to Amy / 1 to Jacob / 1 to Aaron / 1 to Amy / 1 to Amy / 1 to Amy / 1 to Amy / 1 to Amy

Distribute Records Based on Ratio

If you select Distribute Records Based on Ratio as the round robin distribution logic, the system will distribute records to Sales Team A as follows:

1 to Amy/ 1 to Amy / 1 to Amy / 1 to Amy / 1 to Aaron / 1 to Amy / 1 to Aaron / 1 to Amy / 1 to Jacob / 1 to Aaron / 1 to Amy / 1 to Jacob

This distribution logic starts with the user who is farthest from their defined ratio. For example, if Amy only has 2 of 7 records, she is further from the defined ratio than either Aaron (0 of 3) or Jacob (0 of 2.)

Once each user receives the full number of records specified, the Round Robin distribution cycle starts over from the beginning.

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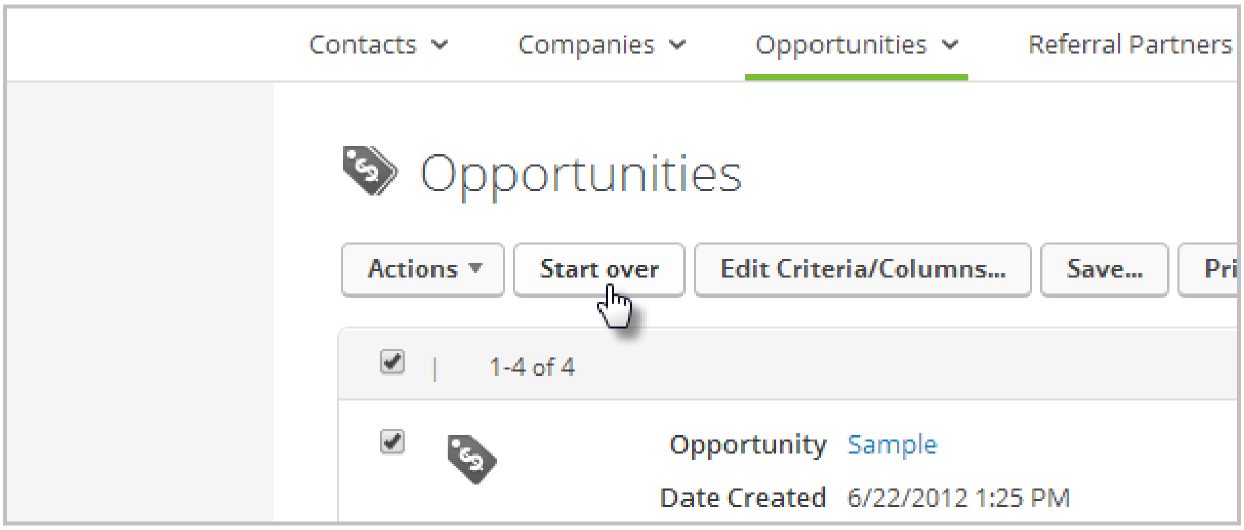
Searching Opportunity Records

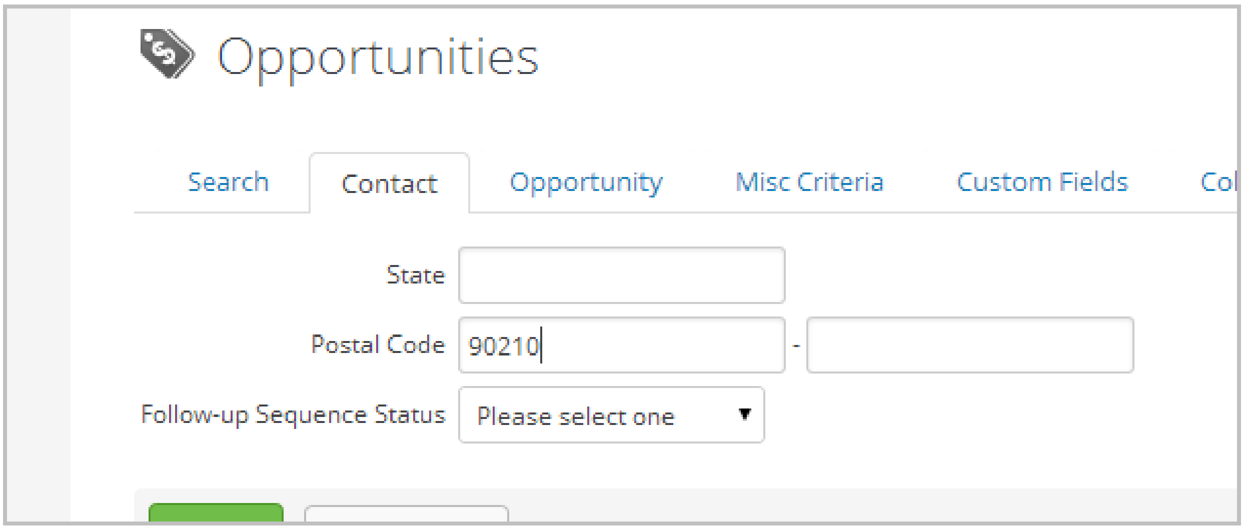
Last Modified on 08/02/2018 2:30 pm MST

You can create and save one or more opportunity searches that will help you easily view and manage your opportunities. These searches can be added to your user home page using the Lil Box o' Stats and Saved Search widgets. When you create a saved search, you save a set of criteria that determine which opportunity record s show up in the search results. The actual opportunities listed in the results will change automatically as the information in opportunity records change (i.e. stage, next action date, etc.). You are creating a dynamic list of opportunities.

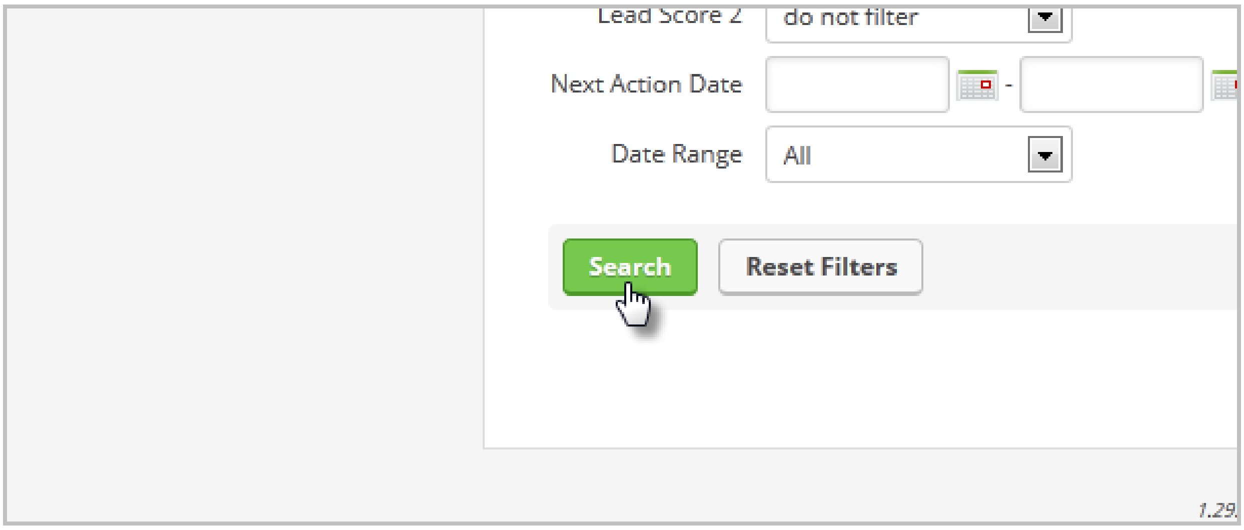
1. Go to **CRM** > **Opportunities** in the main navigation menu.
2. Click on the **Star Over** button to clear previous search criteria.



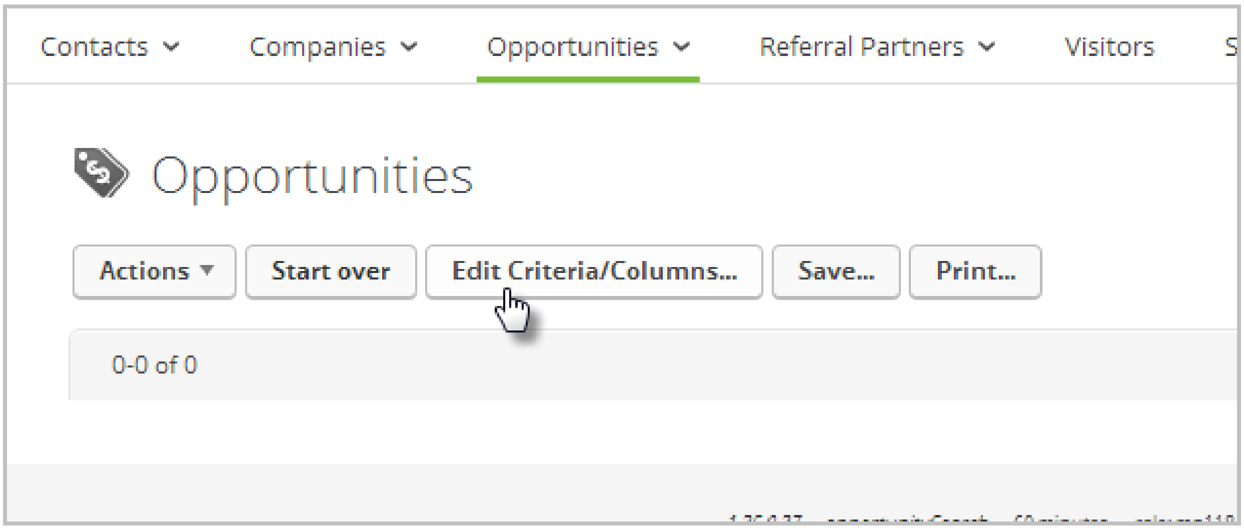
3. Enter the opportunity search criteria from one or more of the tabs to produce a specific opportunity list.
   (e.g. opportunities with next actions that are past due or due today.)



4. Click on the **Search** button at the bottom and verify that the results meet your expectations.

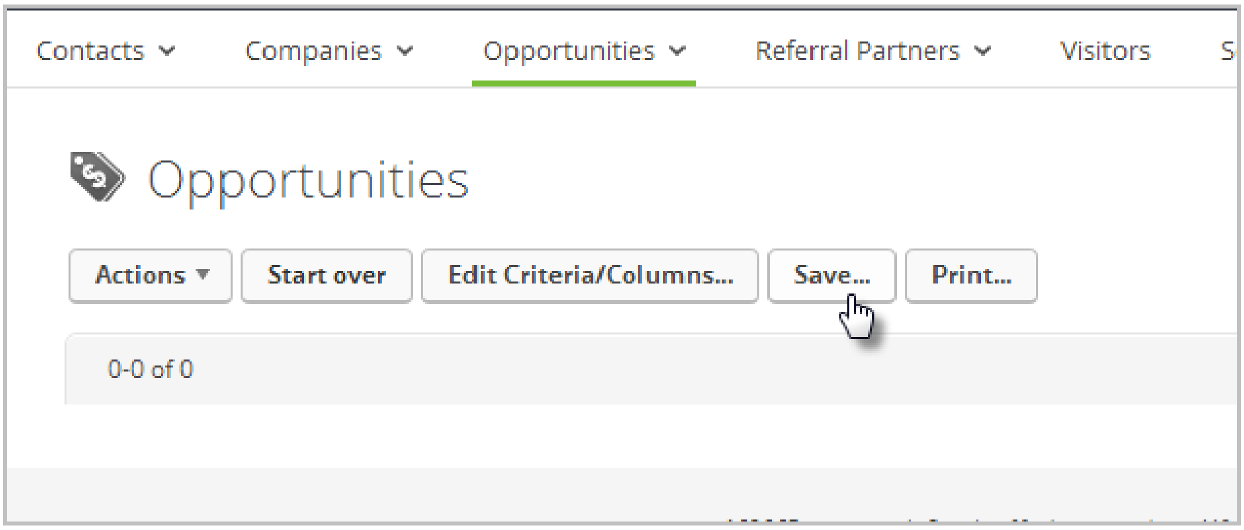


5. (Optional) Click on the **Edit Criteria/Columns...** button to adjust the search criteria or to add and remove columns from the search results.

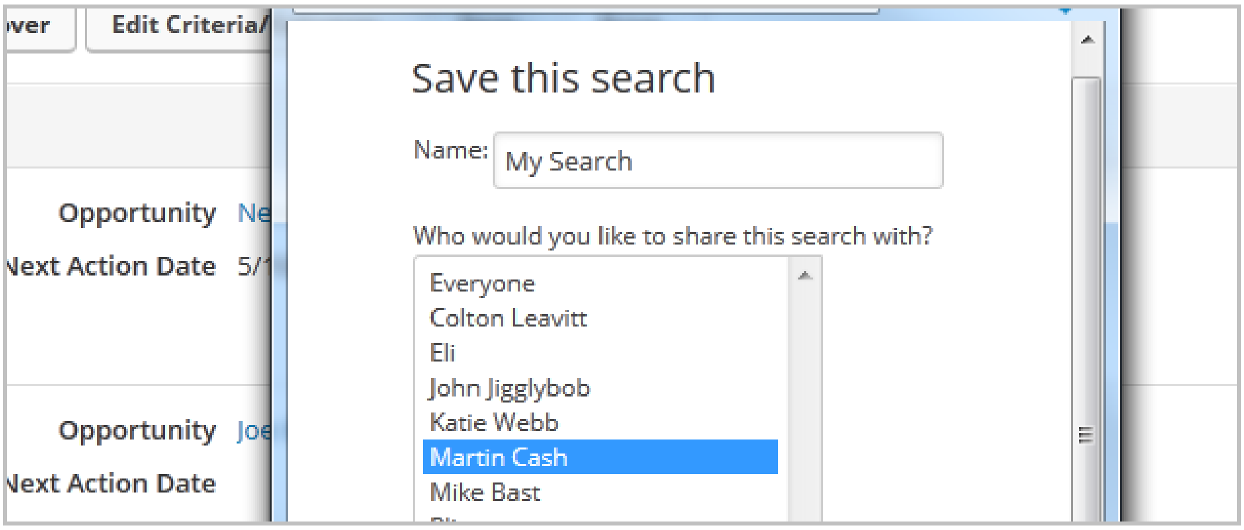


6. Click **Ok** to apply the changes.

7. Click on the **Save** button to name and save the dynamic list for quick access in the future.

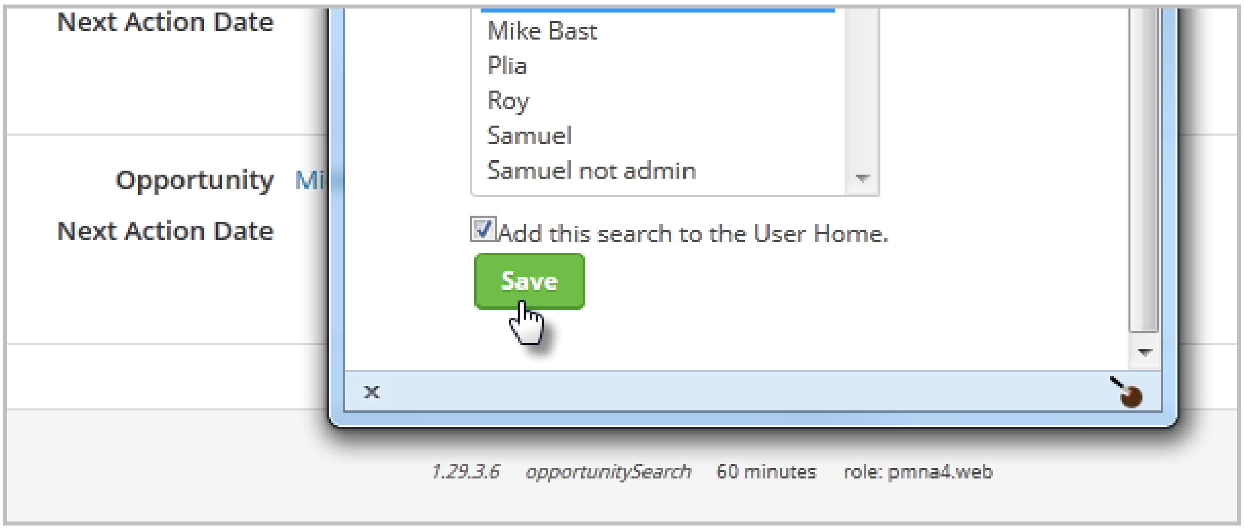


The opportunities in the list will update automatically. You are saving the criteria, not a specific list.

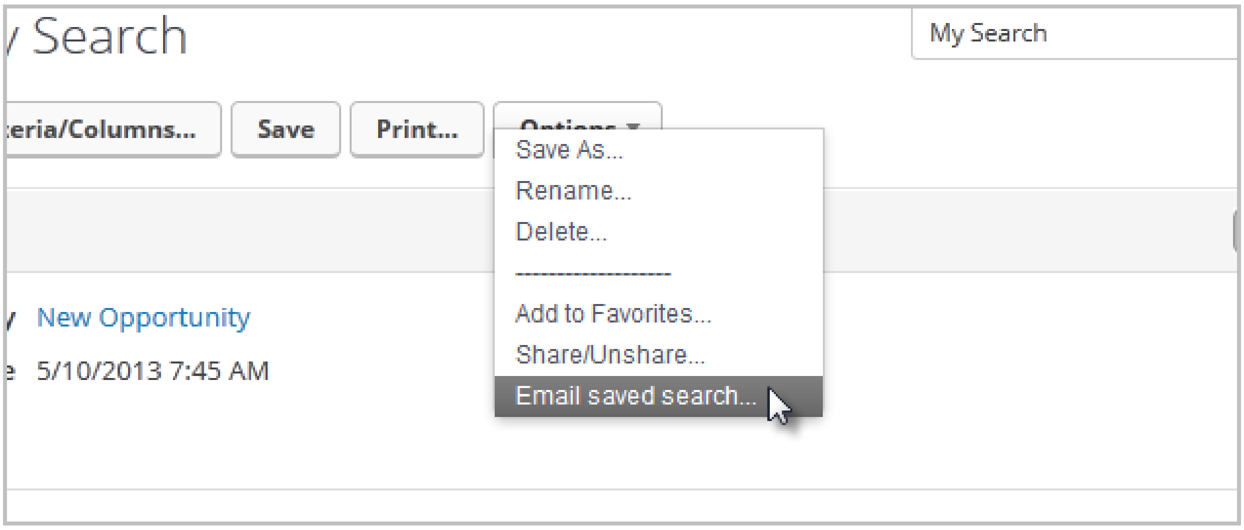


- **Name**: Enter a short, descriptive name for the search. This name will display in custom dropdown menus.
- **Share the Search**: Click on the name(s) of users who need to see this search. Click onEveryone to share the search with all users. Note: Hold down the CTRLkey on your keyboard to select more than one user from the list.
- (Optional) Mark the **Add this search to the user home** checkbox if you want to add a saved search widget to your home page. The saved search widget will display the first 20 opportunities in the list, and a link to view the entire list of people.

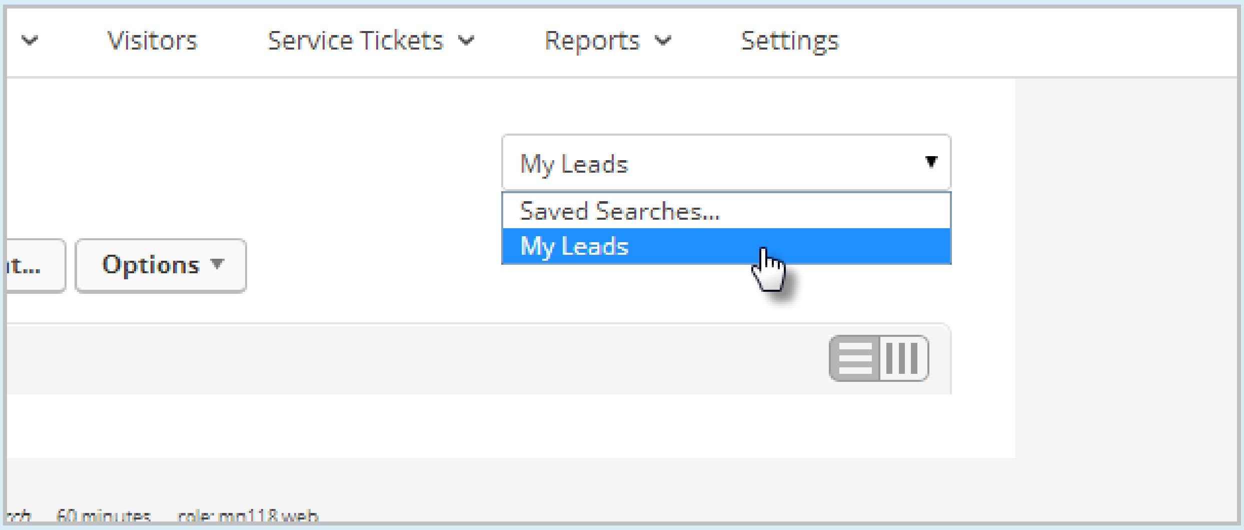
8. Click on the **Save** button to save your search.



9. Click the **Options** button when you are viewing a saved search to modify it, add it to your user home, share it, or create an automated email report.



Pro Tip!
The saved opportunity search is now available as an option on the saved search drop-down on the **CRM > Opportunities** screen.



Next Action Fields In An Opportunity Record

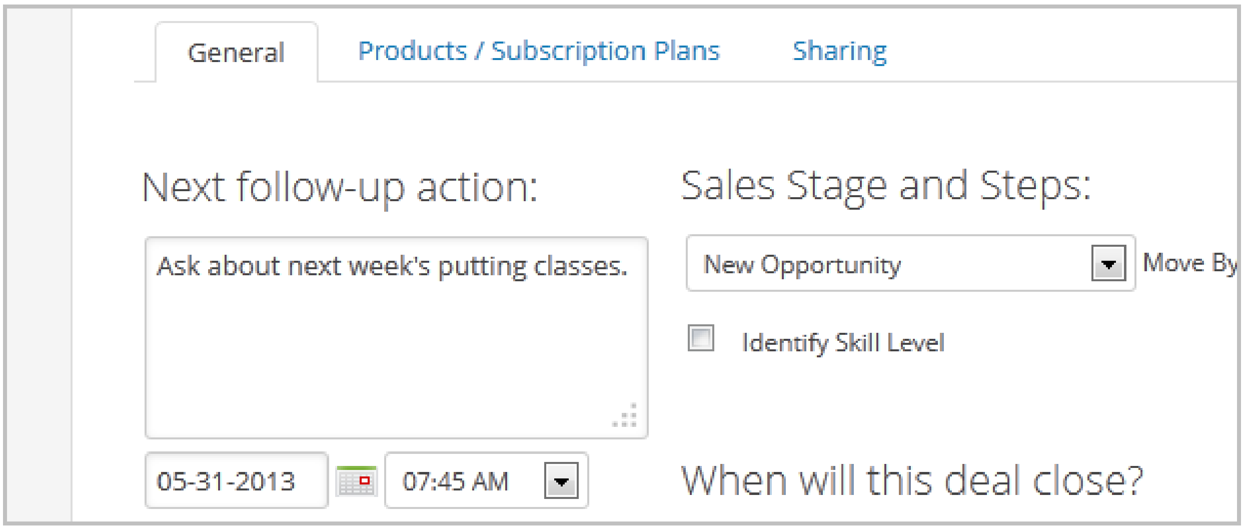
Last Modified on 08/02/2018 2:31 pm MST

After you create an opportunity or get assigned to one automatically, you'll use the opportunity record to keep a record of communication and progress through the sales process. Next action dates can help you track task commitments related to the direct sales process, however, there is no way to assign the "next action" to another Infusionsoft user. If you need to delegate, you should create a task for the person instead. Opportunity next action dates will show up on your Infusionsoft calendar as appointments in My Day (Note that it will not appear in the appointment section of the "Working" tab in My Day.)

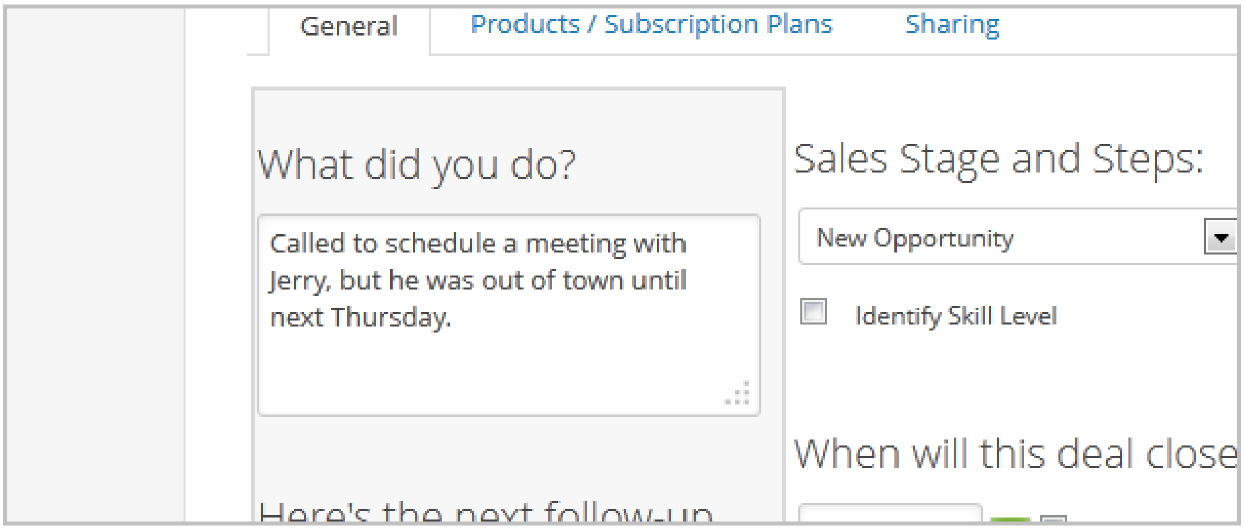
Next Action Date and Notes

Use this area to enter a summary and date for the next manual follow up attempt (i.e. phone call, letter, meeting, etc.). The Next Action Date is used as a search criteria when you create an opportunity list. The notes will remind you of the details (e.g. call to schedule a demo.)

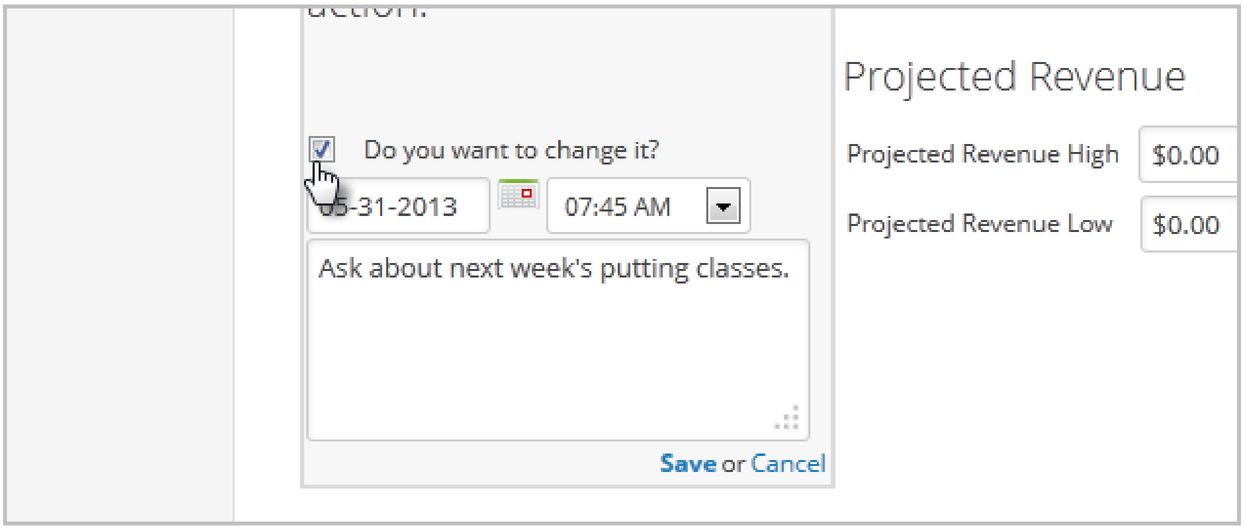
1. Review the next action summary and date.



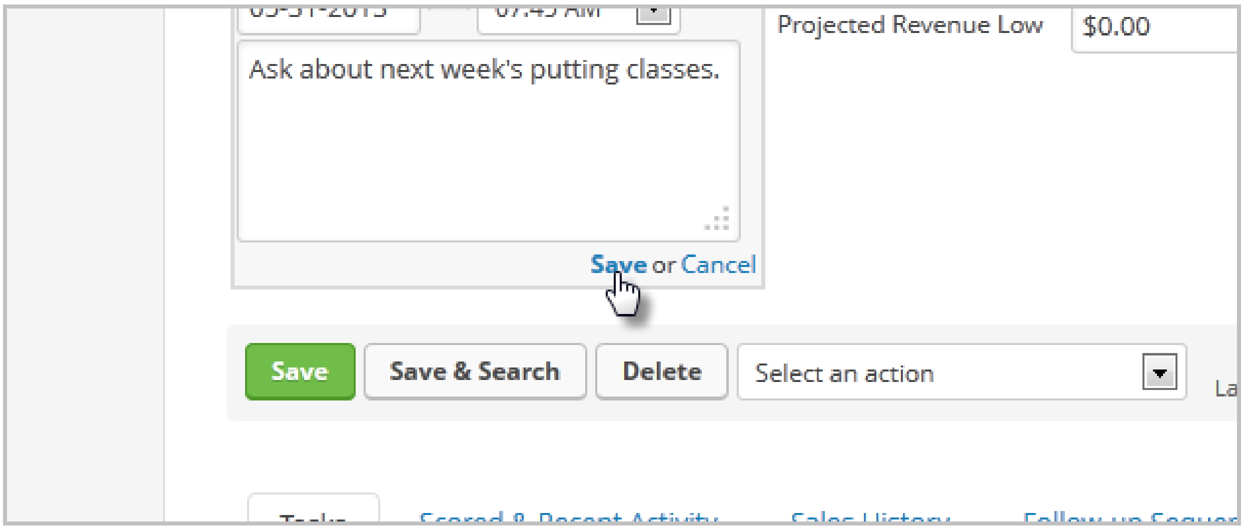
2. Click on **Add a Note to this Opportunity's history** to make notes about a recent interaction with the prospect and update the next action information as needed.



3. (Optional) Mark the checkbox beside **Do you want to change it?** to update the next action summary and date. Enter the new next action summary and follow up date.



4. Click on **Save** to add the note to the opportunity history and update the next action information.



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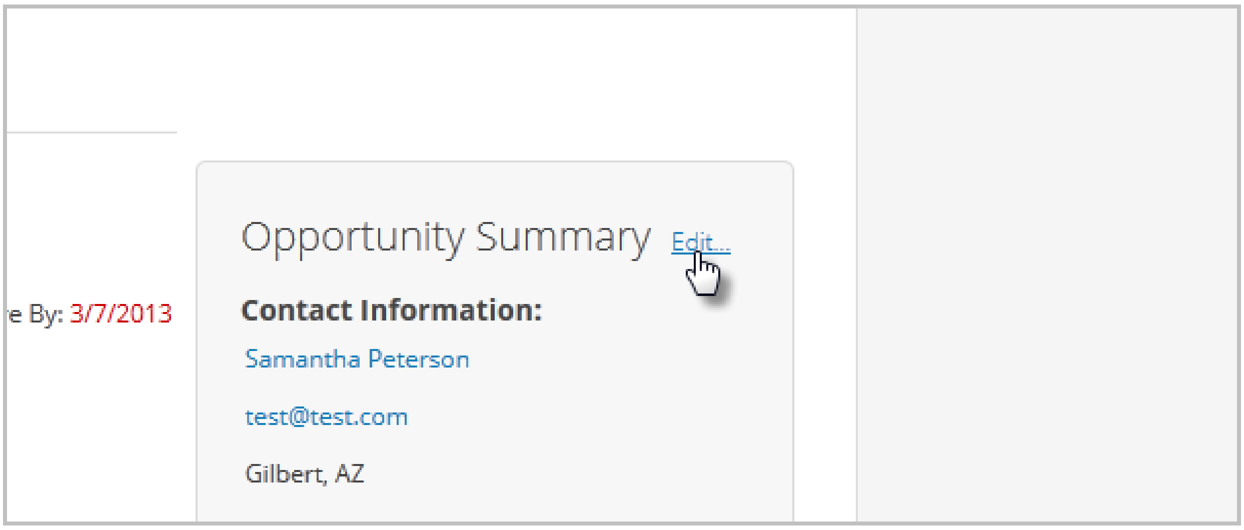
Update The Opportunity Summary

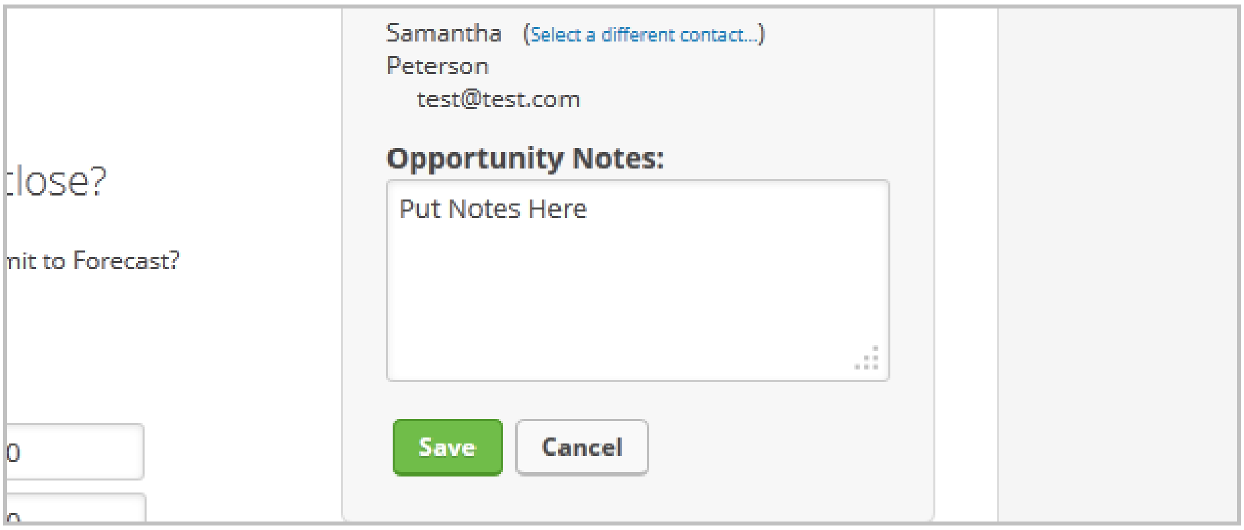
Last Modified on 08/02/2018 2:31 pm MST

The opportunity summary includes basic contact information for your prospect and notes section. You can click on the prospect's name to view their contact record and/or click on their email address to send them a personal email. The opportunity notes section is the best place to keep information you want "front and center." It is like putting a sticky note at the top of the opportunity record . This information is visible at a glance - it does not get buried in the history. Use this area to keep track of the prospect's specific pain points, personal information (family, trips, hobbies), business description, etc. You can review this information quickly when you call the prospect or send them an email.

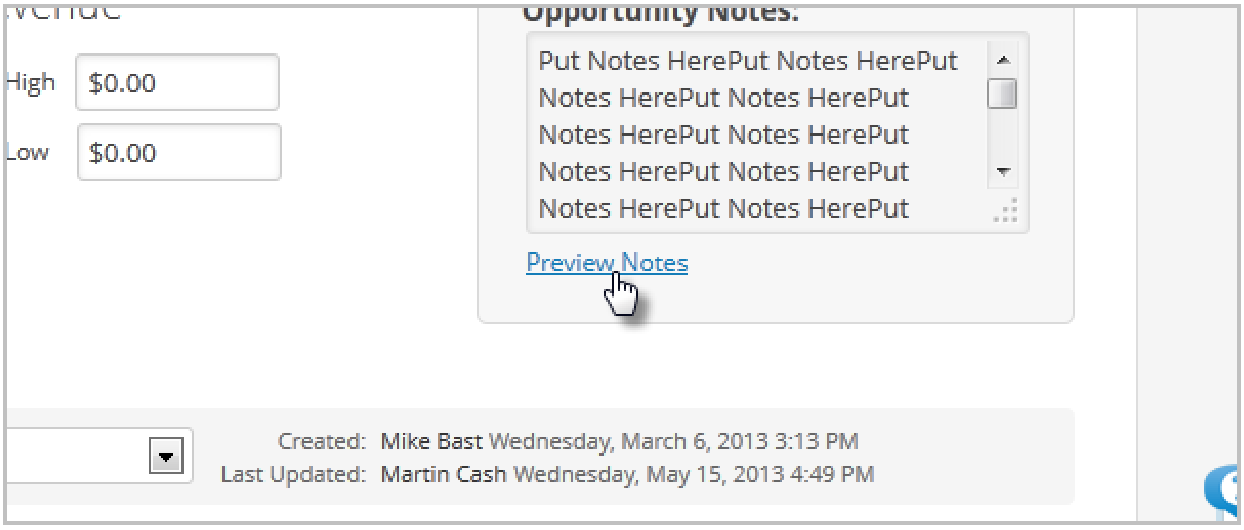
1. Click on **Edit** to add or update the summary notes or change the opportunity title.



2. Enter or add to the summary notes, and click on **Save**.



3. If your opportunity notes summary is lengthy, you can click on **Preview Notes** to open them in a new window.



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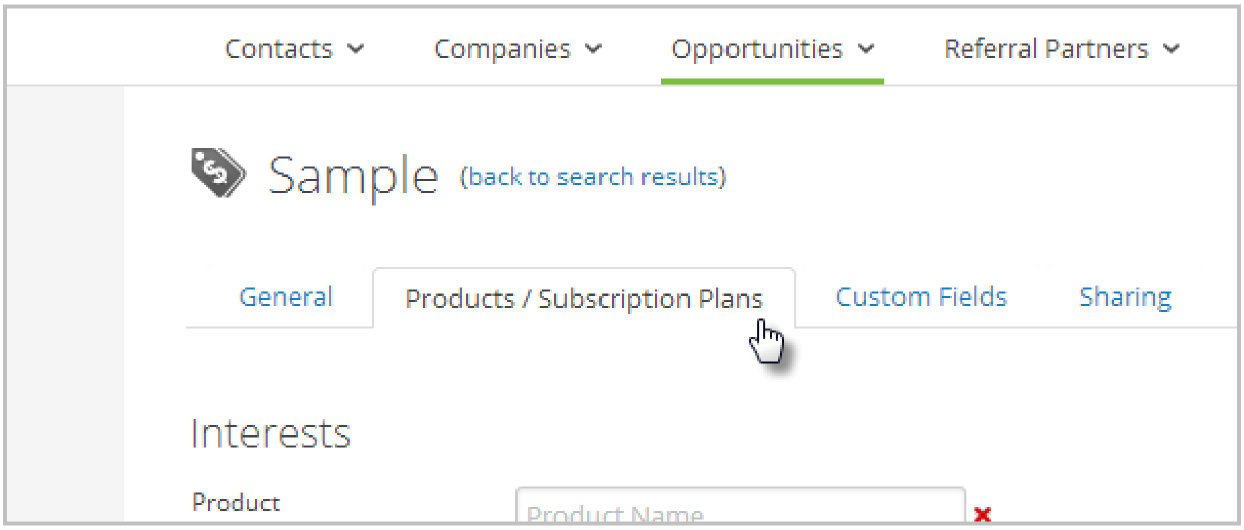
Track Product Interest In An Opportunity Record

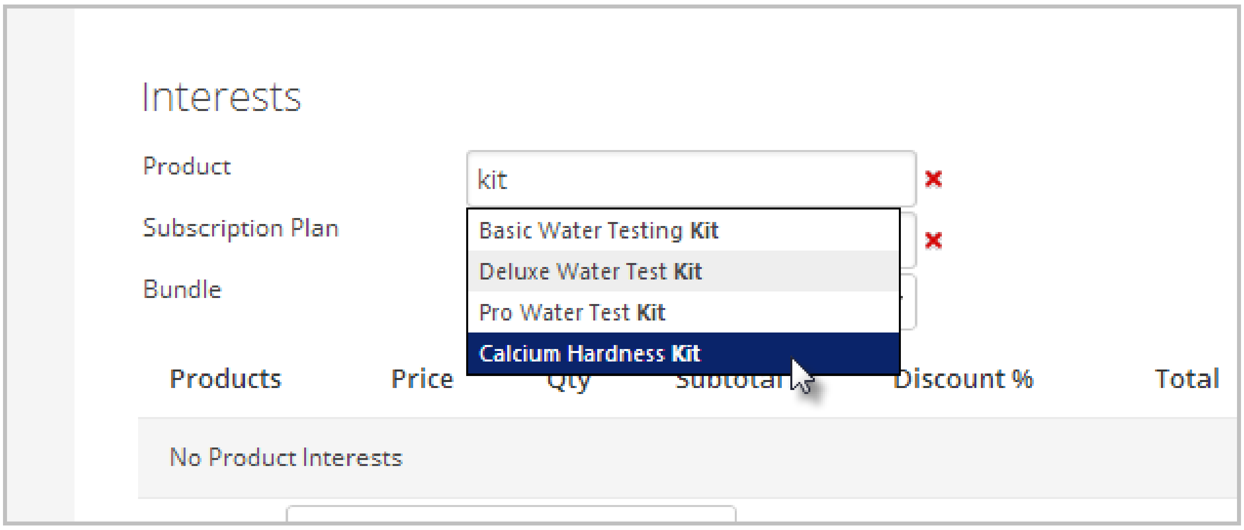
Last Modified on 08/02/2018 2:31 pm MST

As you are working with a prospect, you will learn more about their specific needs and the products you sell that will meet them. If your company is using the Infusionsoft E-commerce module, then you will be able to track the prospect's interests in the Product/Subscription Programs tab of an Opportunity Record . This information is used to forecast revenue, create a Buy Now link, or Create an Order.

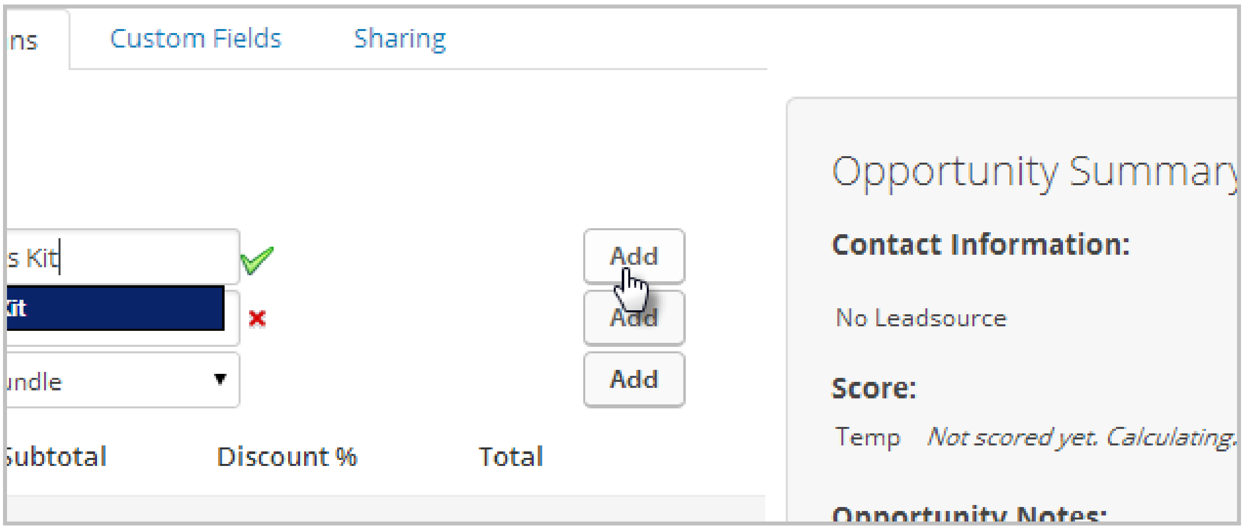
1. While viewing an opportunity record, click on the **Products / Subscription Plans** tab.



2. Add interests one at a time or select a **Product Interest Bundle** from the drop-down.

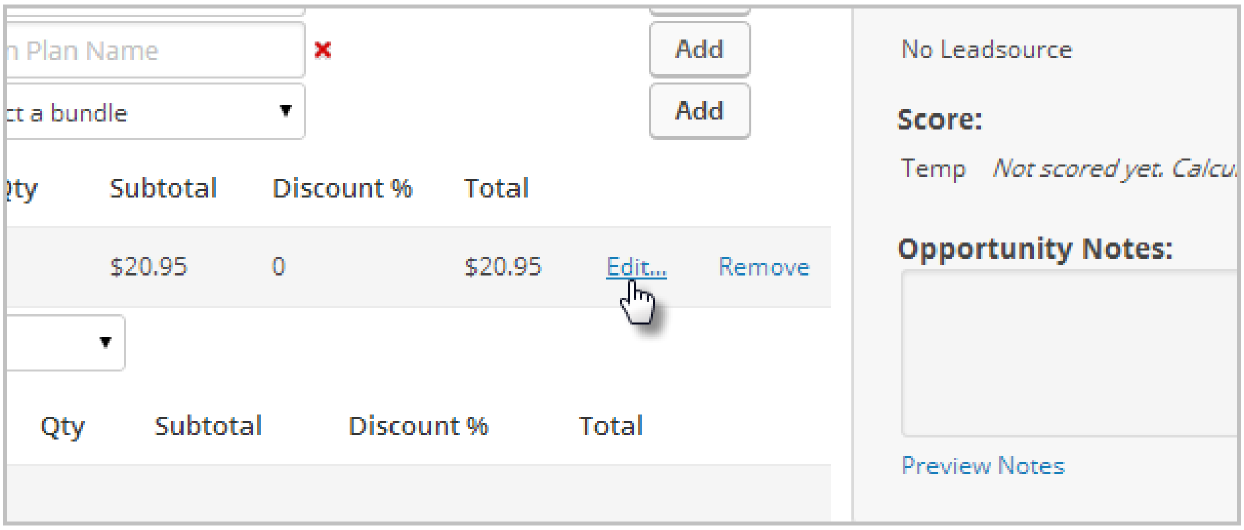


3. After selecting the product or subscription program, click on the **Add** button.

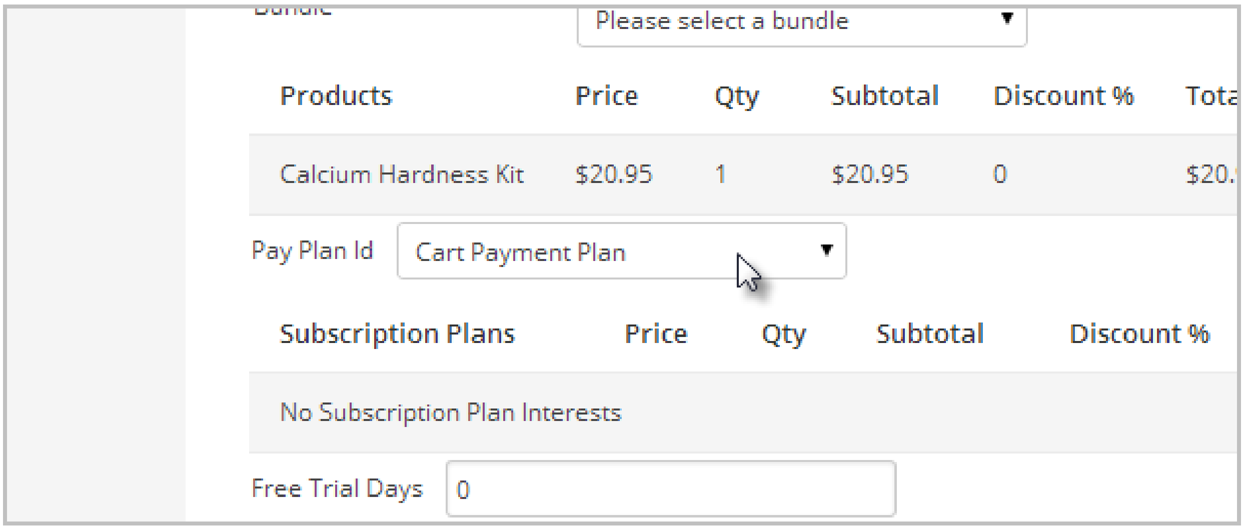


4. (Optional) Repeat this process to add more products.

5. (Optional) Click on **Edit** to change the quantity for one of the products or to enter a percentage discount (e.g. a 30% discount), and then click on **Save**.

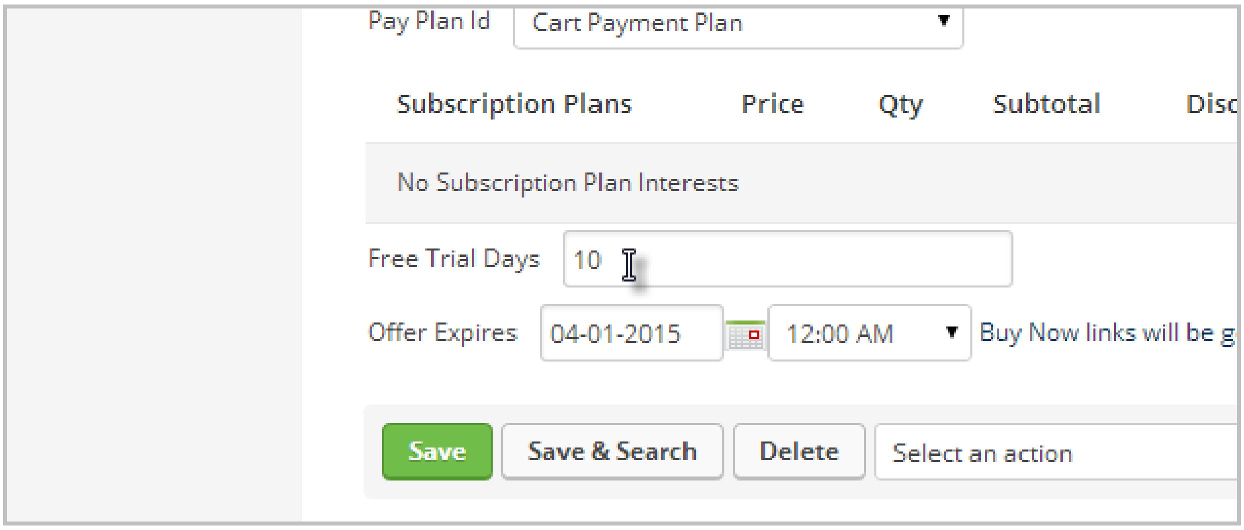


6. (Optional) Select a pay plan from the drop-down.

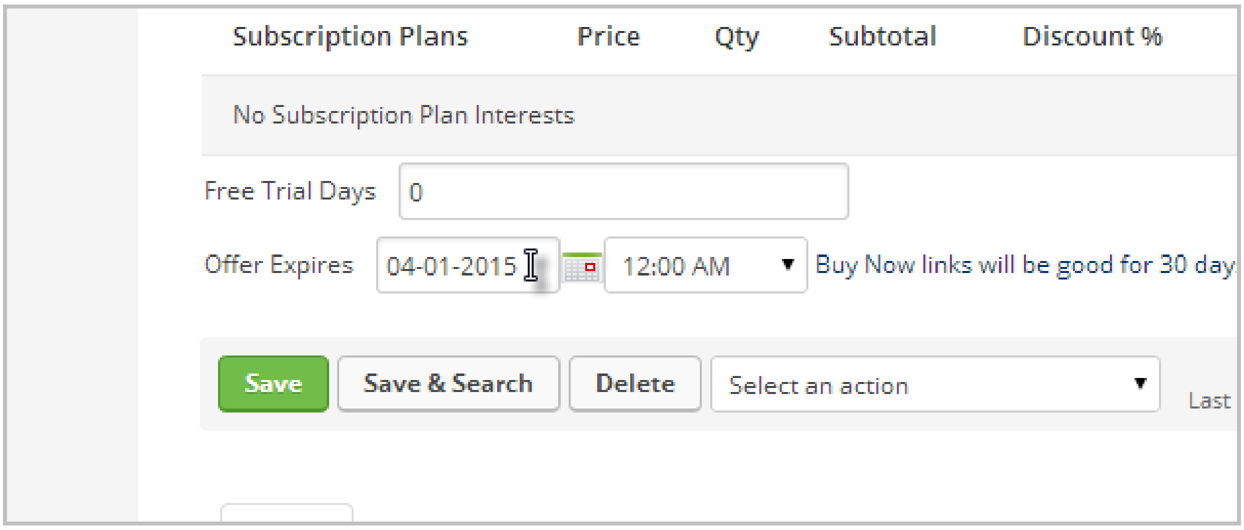


This will split the customer's purchase into multiple installments and may involve interest fees. Make sure you are familiar with the details of the pay plans your company offers.

7. (Optional) If the prospect is interested in a subscription program, you can give them a free trial period. The person will not be charged the first fee until the free trial is over.



8. (Optional) Set an expiration date for the offer. If you send a buy now link, the prospect will not be able to purchase after the date entered here. By default, the buy now links expire after 30 days.



9. Click on the **Save** button to apply the update.

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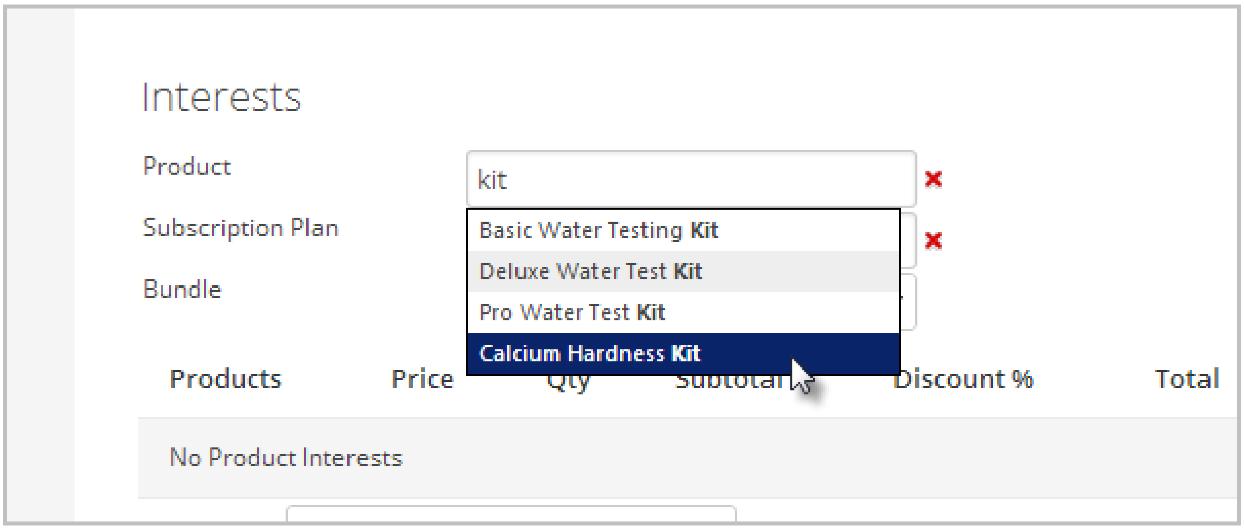
Send A Buy Now Link From An Opportunity Record

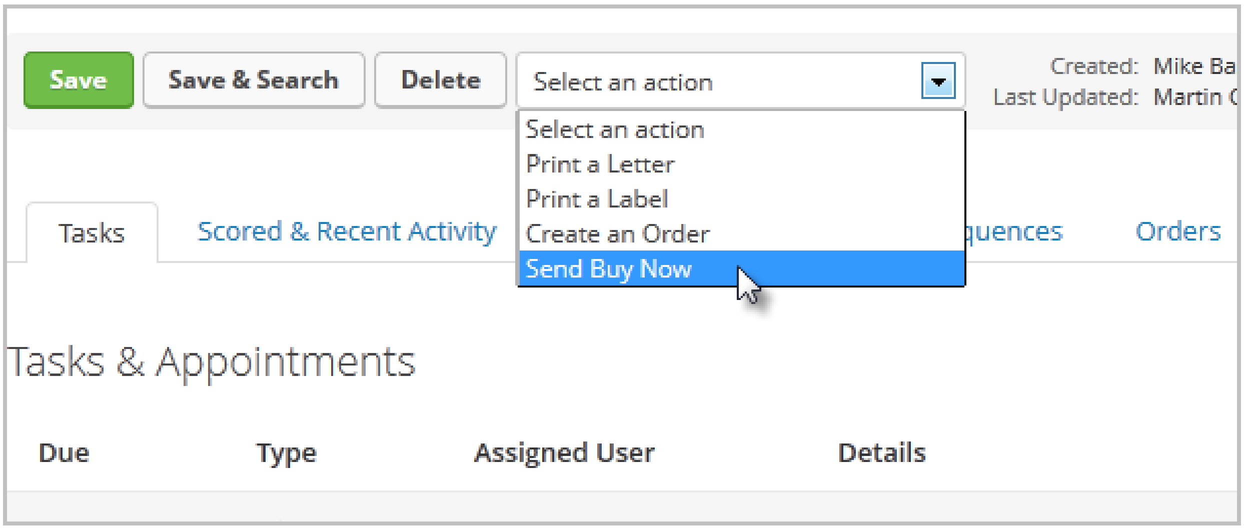
Last Modified on 08/02/2018 2:32 pm MST

When a sales rep tracks product/subscription program interest in an opportunity record , they can generate an email with a buy now link when someone is ready to buy. The buy now link takes the customer directly to the Infusionsoft shopping cart with the order details already entered (including products, payment terms and discounts) and the customer's contact information already populated in the billing and shipping fields. The customer simply enters their credit card number to complete the purchase and create an order record in Infusionsoft.

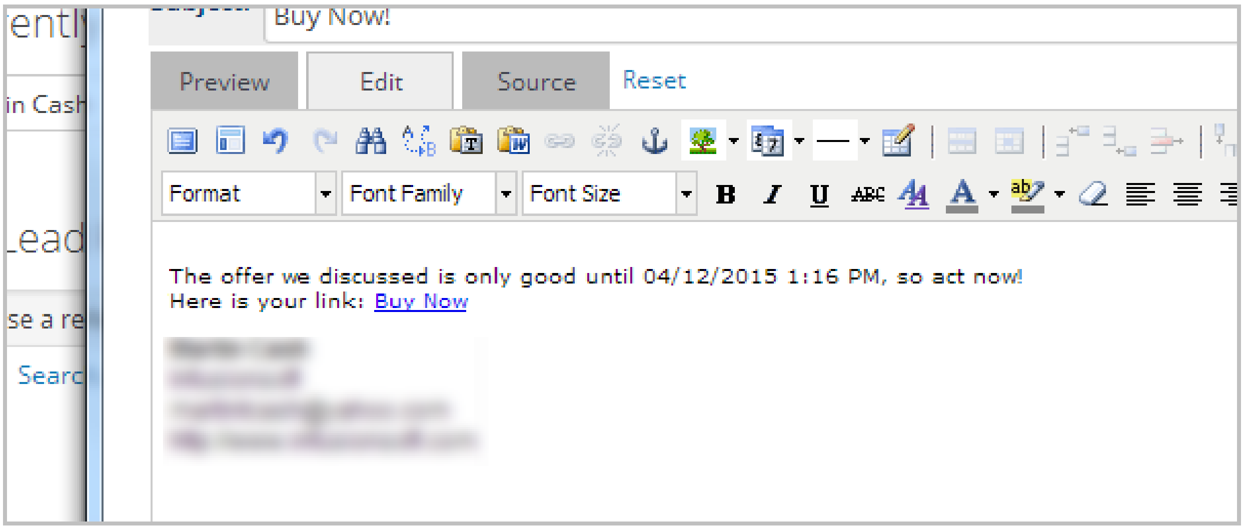
1. The Sales Rep attaches product, subscriptions, and / or product interest bundles to an opportunity along with discounts, payment plans, and time limits.



2. The Sales Rep generates an email with a buy now link through the opportunity actions.



3. The Sales Rep customizes the buy now email message and sends it to the prospect.



4. The prospect receives the email and clicks on the buy now link in it.

   This takes them to the Infusionsoft shopping cart to check out. The products and discounts are pre-populated. The prospect cannot change anything here.

5. The customer enters their payment information to complete the purchase.

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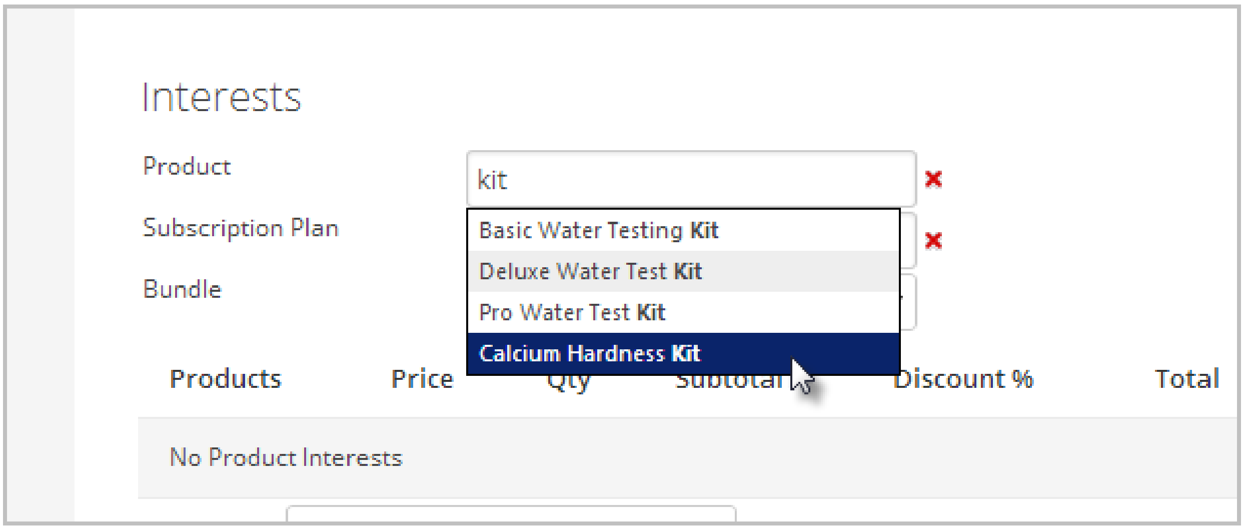
Create An Order From An Opportunity Record

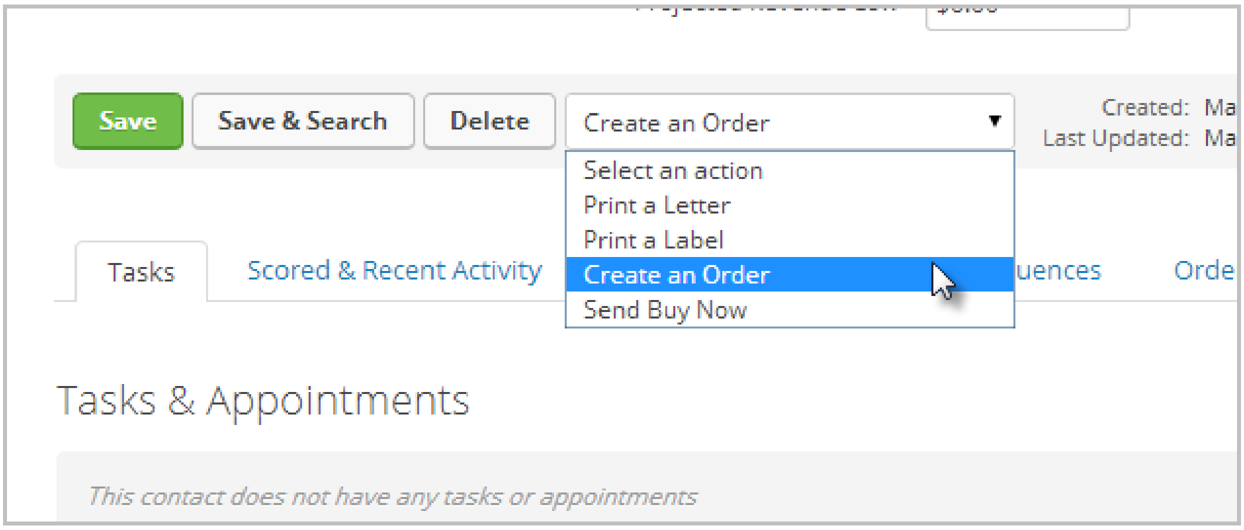
Last Modified on 08/02/2018 2:32 pm MST

The create an order method is essentially a streamlined way of creating a manual order in Infusionsoft. It generates an unpaid order record based on the product/subscription program interest recorded in the opportunity record (including products, payment terms, and discounts.) After the order is created, the sales rep manually records the customer's credit card payment or sends an invoice requesting payment. This method is less automated, but can be more immediate. If the customer is ready to buy and pay by credit card right away, this method reduces the risk of losing the sale because the customer does not complete the shopping cart purchase process. The create an order method will trigger purchase action s once the order payment is recorded, if you have configured the system to do so.

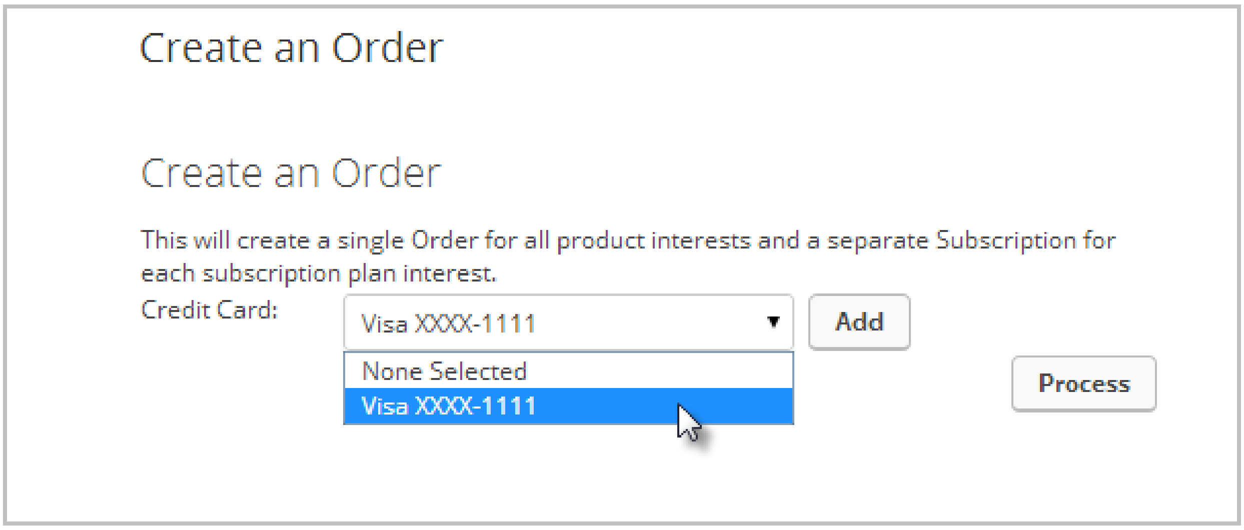
1. Attach products, subscriptions, and / or product interest bundles to an opportunity and add applicable discounts, payment plans, and time limits.



2. Select **Create an Order** from the opportunity actions.



3. Select a credit card on file, and click the **Add** button to enter a new one, or leave the credit card field blank to create an unpaid order. Click on the **Process button** to create the Order.



Unpaid Order: If this is an unpaid order, the Sales Rep will need to manually send an Invoice to request payment. If it is a paid order, this may happen automatically, if your system is set up to Email Invoice Upon Successful Payment.

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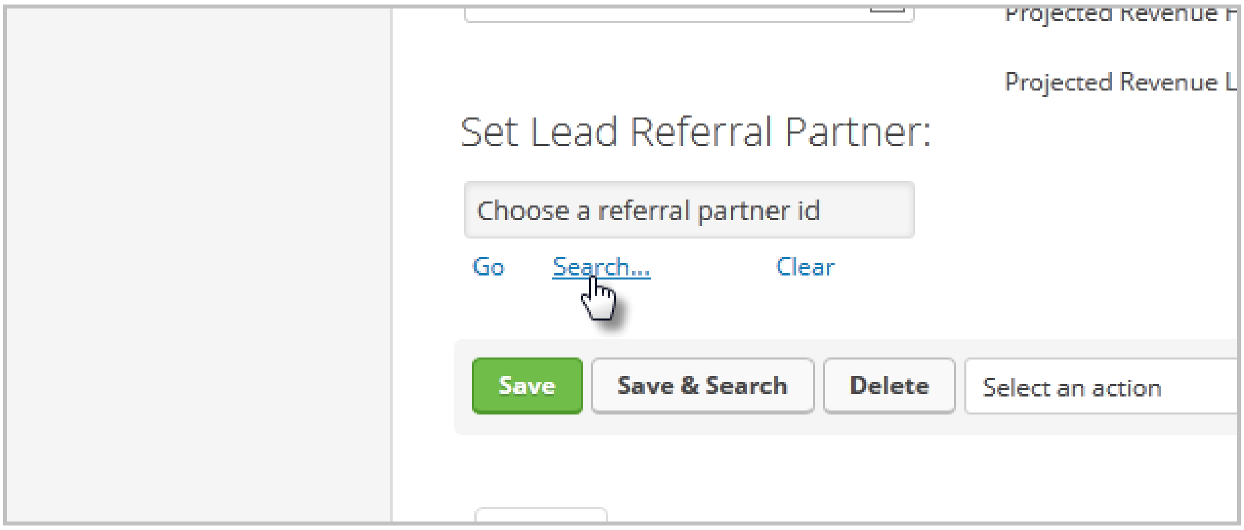
Assign A Referral Partner To An Opportunity

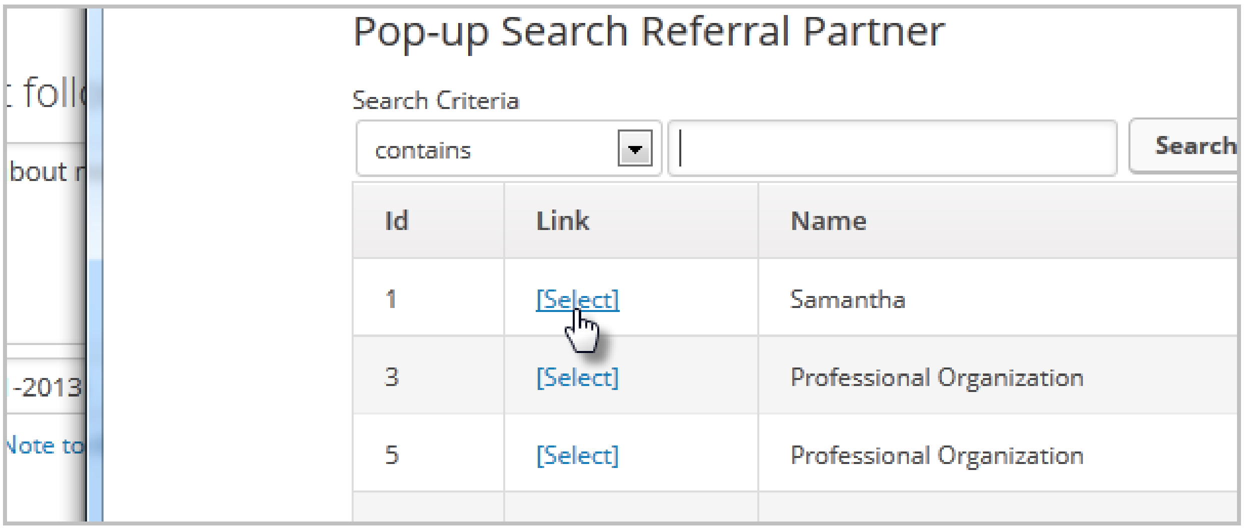
Last Modified on 08/02/2018 2:32 pm MST

Your company may have a partner program that pays referral partners commission for the leads they send to you. When a partner sends you a lead, you will need to make sure the referral is tracked in your opportunity record so that the affiliate will receive credit for the lead. The commission is calculated when the deal closes and a purchase is made.

1. While viewing an opportunity record, go to the *Set Lead Referral Partner* section and click on **Search**.



2. Search for and select a referral partner to attach to the opportunity.



3. Click on the **Save** button to apply the update.

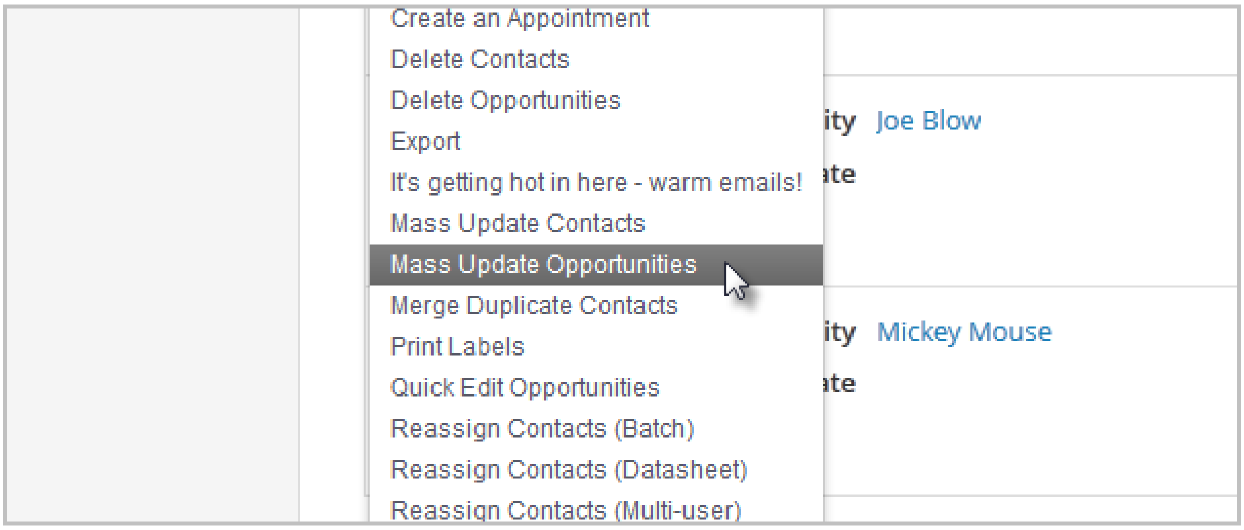
Mass Update Multiple Opportunity Records

Last Modified on 08/02/2018 2:33 pm MST

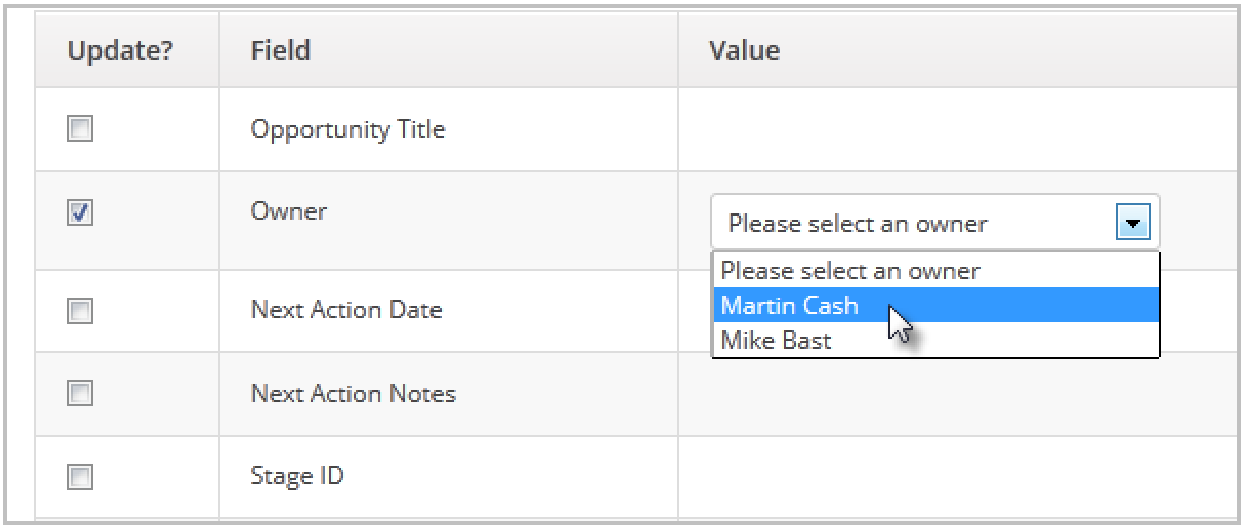
You can mass update the following information for a list of opportunity records:

- Opportunity Title
- Owner (e.g. Sales Rep)
- Next Action Date
- Next Action Notes
- Stage ID
- Estimated Close Date
- Include in Forecast
- Win Reason
- Loss Reason
- Projected Revenue High
- Projected Revenue Low
- Free Trial Days
- Pay Plan ID
- Offer Expires
- Opportunity Record Custom Fields

1. Go to **CRM** > **Opportunities** in the main navigation menu
2. Search for the opportunity records you want to update
3. Click on the **Actions** button and and select **Mass Update Opportunities** from the drop-down



4. Mark the checkbox beside the field(s) you need to update, and enter the new value for that field
   Note: The new value will override any existing values for these opportunities.



5. Click on the **Process Action** button to permanently update the opportunities

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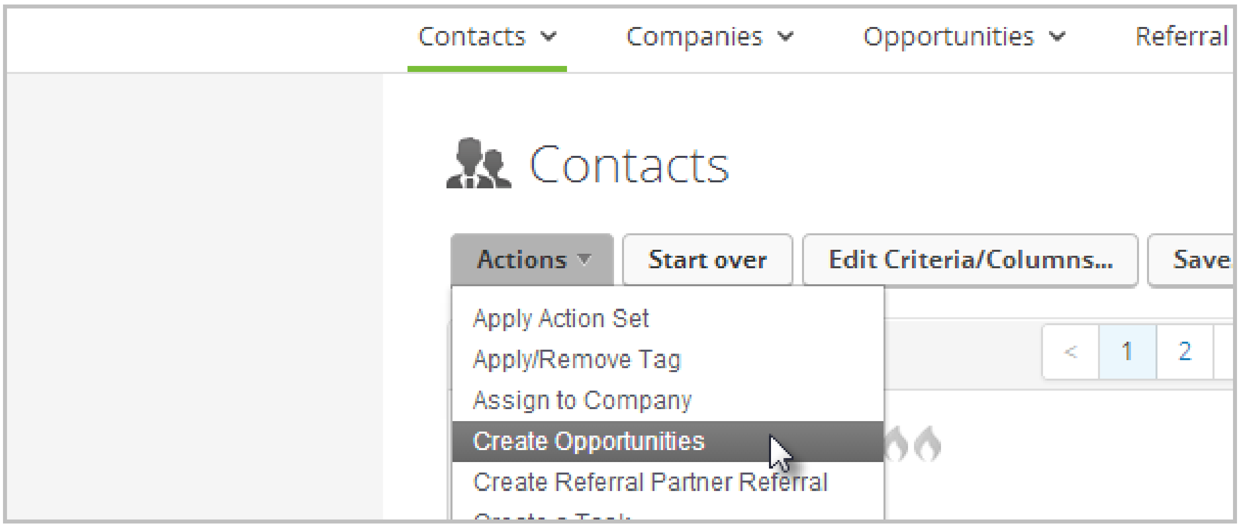
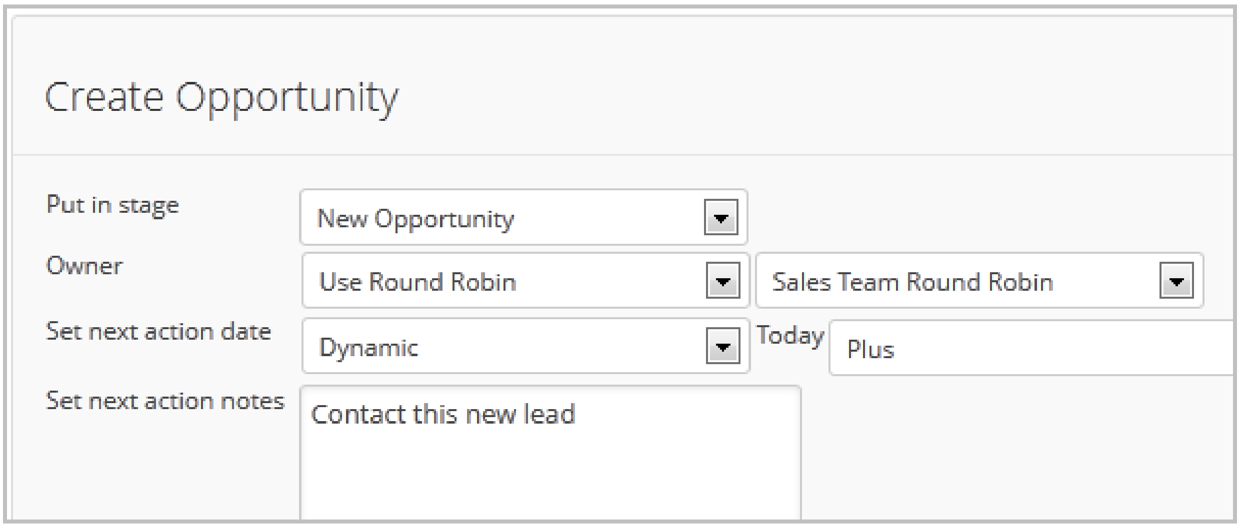
Batch Create Opportunity Records

Last Modified on 08/02/2018 2:33 pm MST

1. Go to **CRM** > **Contacts** in the main navigation menu.
2. Search for the contact records that you want to create opportunities for.
3. When you have the correct search results, click on the **Actions** button and select select **Create Opportunities** from the drop-down.



4. Select a *Stage* and *User* (or use round robin.)



5. Set the *Next Action Date*. The next action date determines where this opportunity will

show up on the sales rep's Infusionsoft calendar.

   1. **Dynamic**: This is most common. It sets the next action date based on the date the opportunity is created. If you want to set the date for the same date, then set this to "plus 0 days." Using the minus option will allow you to set a date in the past. These will show up as overdue opportunities in opportunity searches.
   2. **Static**: This will assign the same next action date to all new opportunities created through this action. It can be useful to group all event related follow-up on a specific day after the event.

6. Enter *Next Action Notes*. Enter notes for the sales rep to tell them how this lead came to them and / or provide instructions about how to initiate their follow up.

7. *Only create if a contact doesn't have an active lead already?* This is set to *No* by default. Change this to *Yes* and the system will create another active lead for the prospect, even if there is an existing active lead. This could create a situation where there are two active leads, each assigned to a different sales rep, if you are using a round robin. Set this to *Yes* to keep the system from creating another active lead.

8. (Optional) *Interest Bundle*: Select a product interest bundle from the dropdown. This is most commonly used when the opportunity is created through a trigger event (e.g. form filled out, link clicked, checkbox marked, etc.) that indicates an interest in a specific product or set of products.

9. Click **Save** to save the action.

10. Click the **Process Action** button.

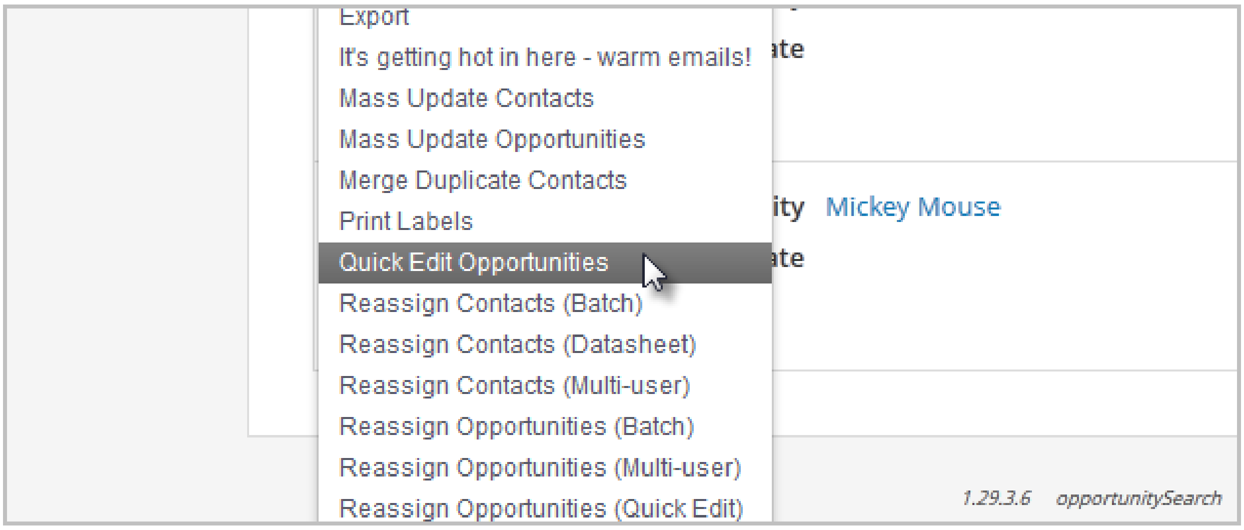
Quickly Edit Multiple Opportunity Records

Last Modified on 08/02/2018 2:33 pm MST

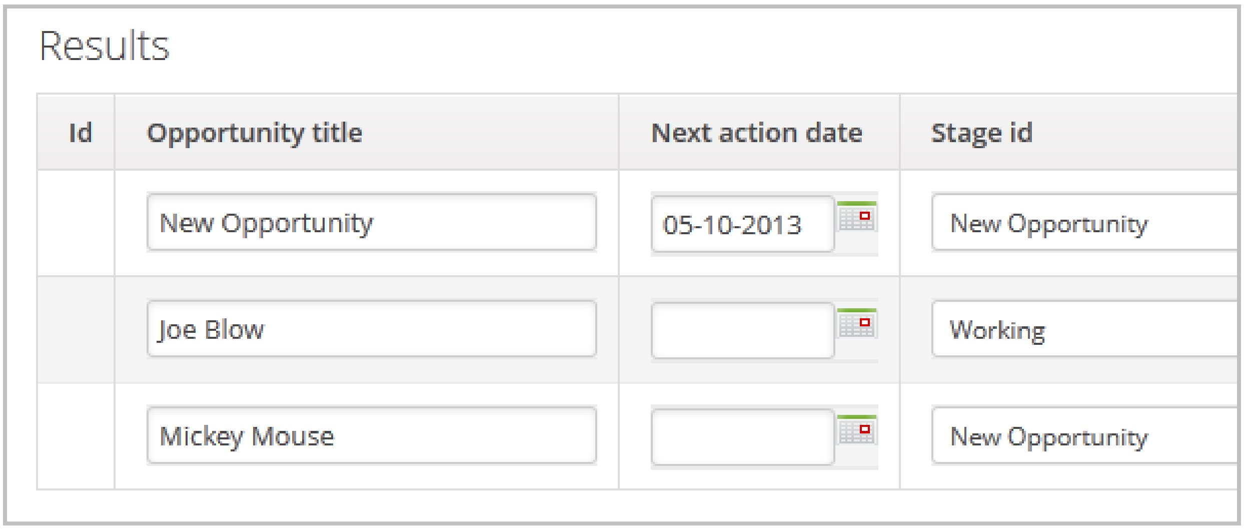
1. Go to **CRM** > **Opportunities** in the main navigation menu.

2. Search for the records you would like to update.

3. Click on the **Actions** drop-down and select **Quick Edit Opportunities.**



4. Update the *opportunity title*, next *action date*, and/or *stage*.



5. Click the **Save** button to apply the updates.

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Set Up Lead Scoring In Infusionsoft

Last Modified on 08/02/2018 2:34 pm MST

Lead Scoring Overview

Scoring is most often used by businesses with direct sales teams. Automatic lead scoring is an objective way of assessing a prospect's level of interest based on their engagement level. Lead scoring allows sales reps to focus on their hottest leads, and prioritize their daily call list. In Infusionsoft, a score is a set of rules that automatically assign points to contact record based on tags applied, web forms submitted, links clicked, and emails opened.

Once enabled, the scoring process runs constantly in the background. When a tag is applied or removed, the score is updated in real time, adding and subtracting points from contact records based on the criteria you've defined. The score is assigned to a contact record, but it is also displayed on a contact's opportunity record . Every contact in your database is scored based on the criteria you define here.

Before you define scoring criteria, take time to create a strategy based on sales team knowledge and experience. Make a list of ways prospects interact with you during the sales process and assign a value to each activity (see example). An activity that indicates a higher level of interest in your products or services merits more points than an activity that represents marginal interest.

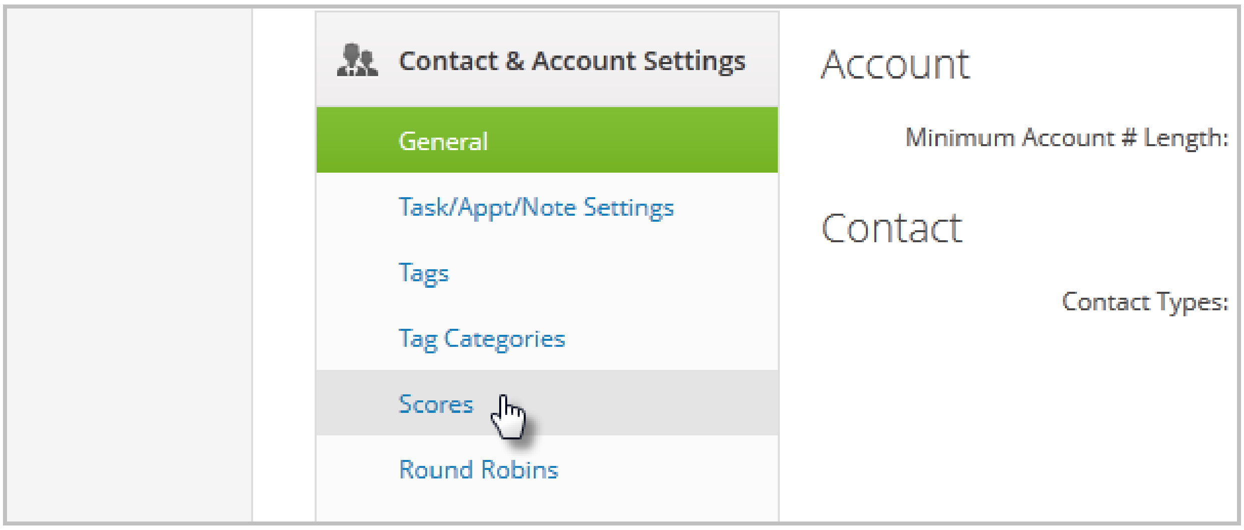
Before you customize the score, you should also review your Tags to make sure:

- Tags have been created to represent the prospect's activity you outlined in your strategy.
- Tags are being added or removed from contacts automatically (e.g. through an action or campaign sequence) or manually by your users.

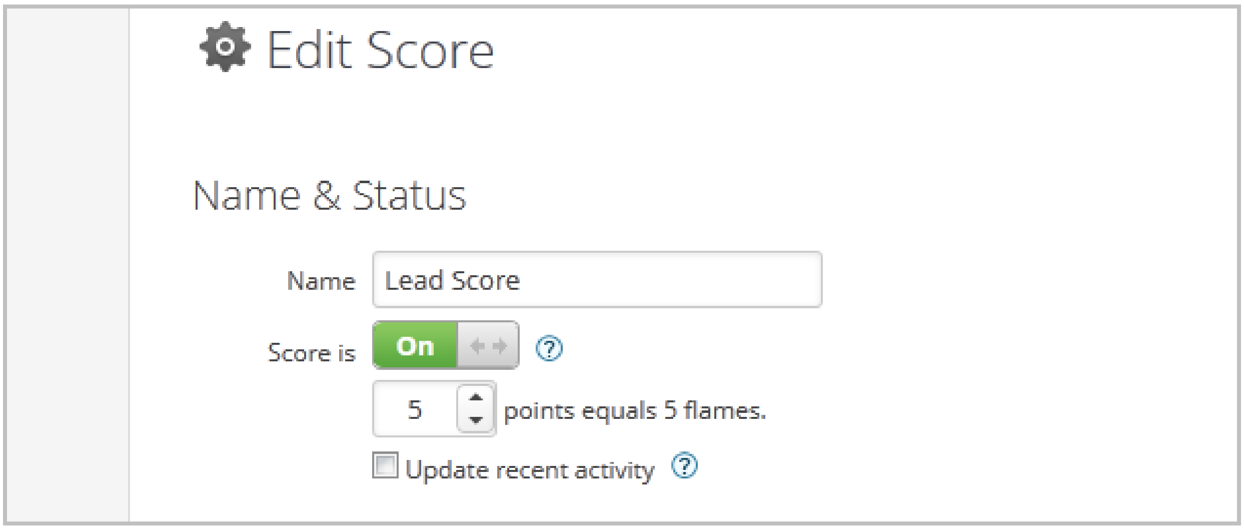
Setup

1. Go to **CRM** > **Settings** in the main navigation menu.

2. Go to **Contact & Company Settings** and click on **Scores**.

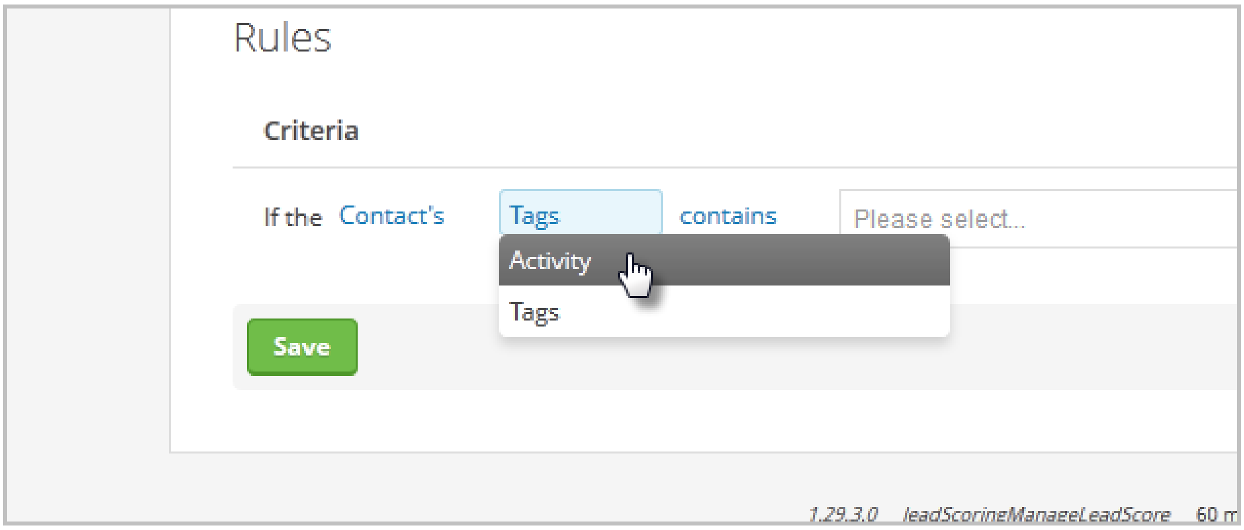


3. Enter the number of points that represent an "ideal score" of 5 flames.
   The number of flames displayed on a Contact Record is based on the percentage of Ideal Score points accumulated. Note: An ideal score is comparable to an A+ or 100%. It is the score that indicates a contact has met enough of the scoring criteria to be considered a "hot" lead.

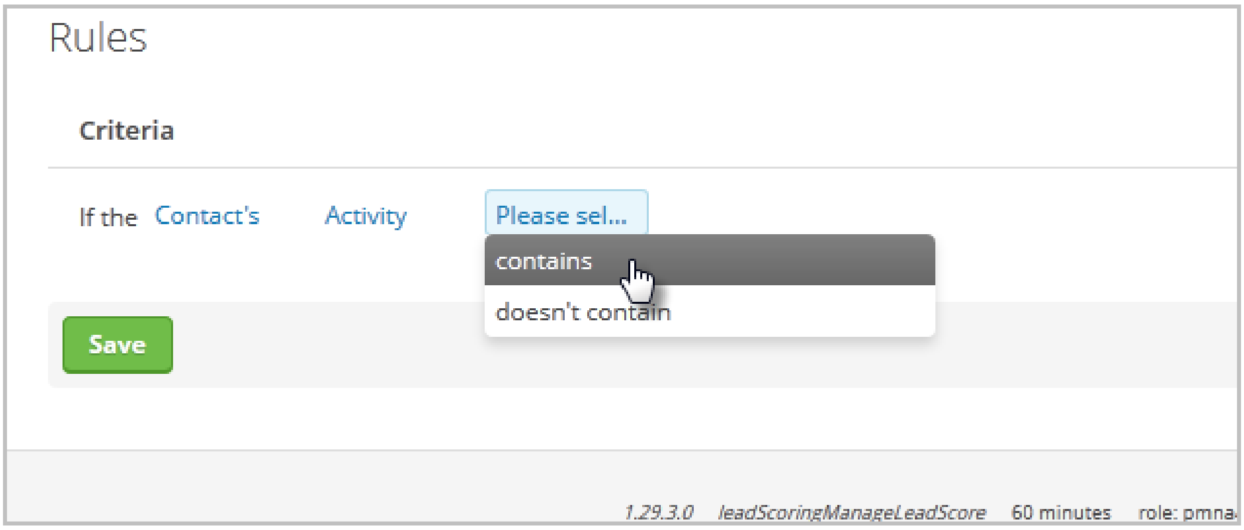


4. Define the first criteria for the scoring rules.

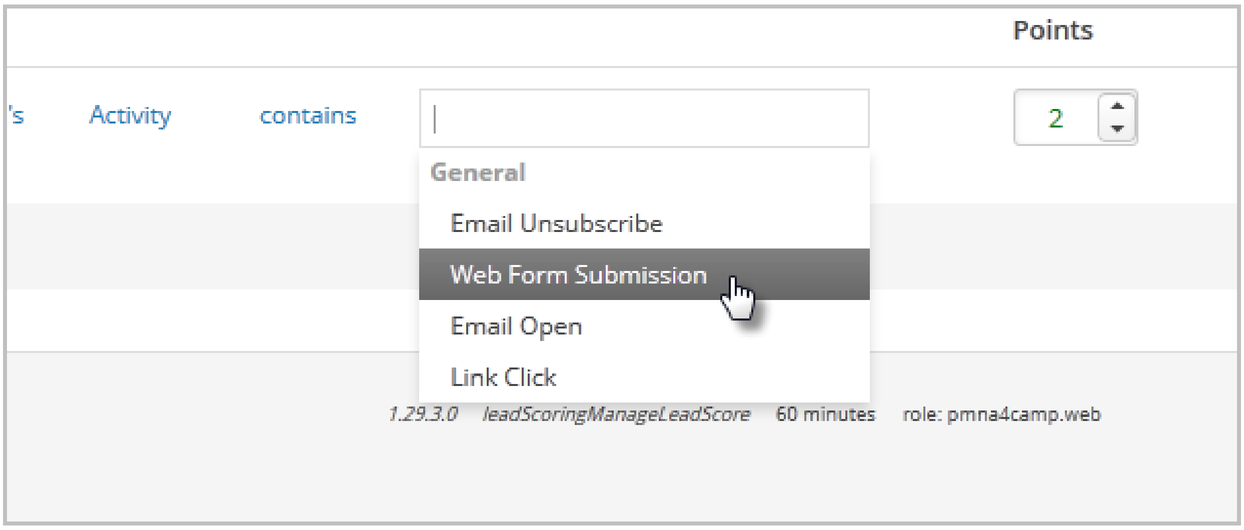
5. Select a *Tag* or *Activity* parameter.
   In the example below, we add a rule that increases the score by 2 points if a web form is submitted. We chose **Activity** as our first parameter.



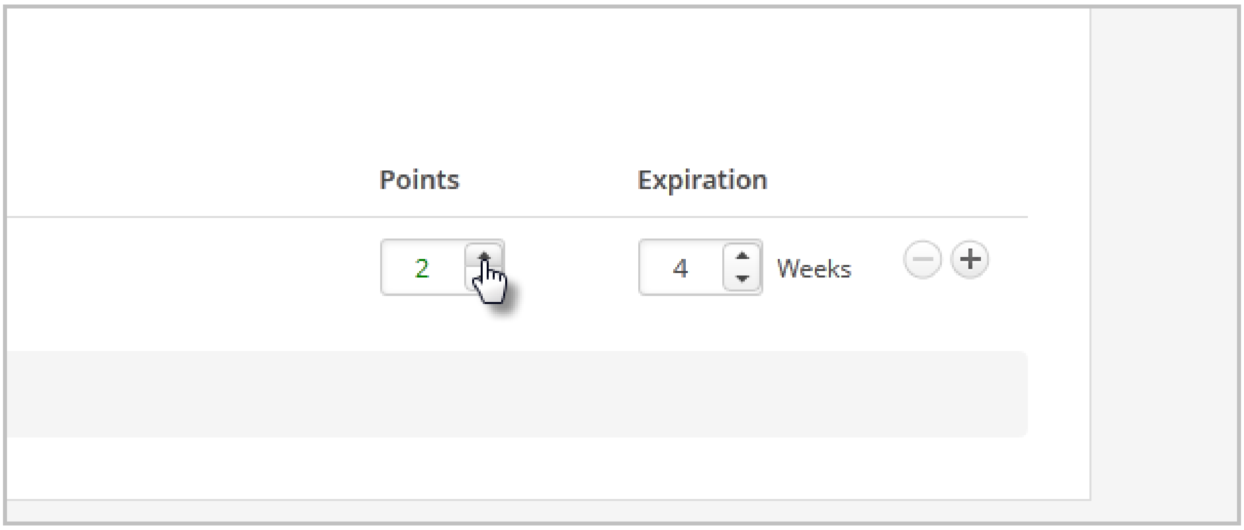
6. Choose **Contains** as the next parameter.



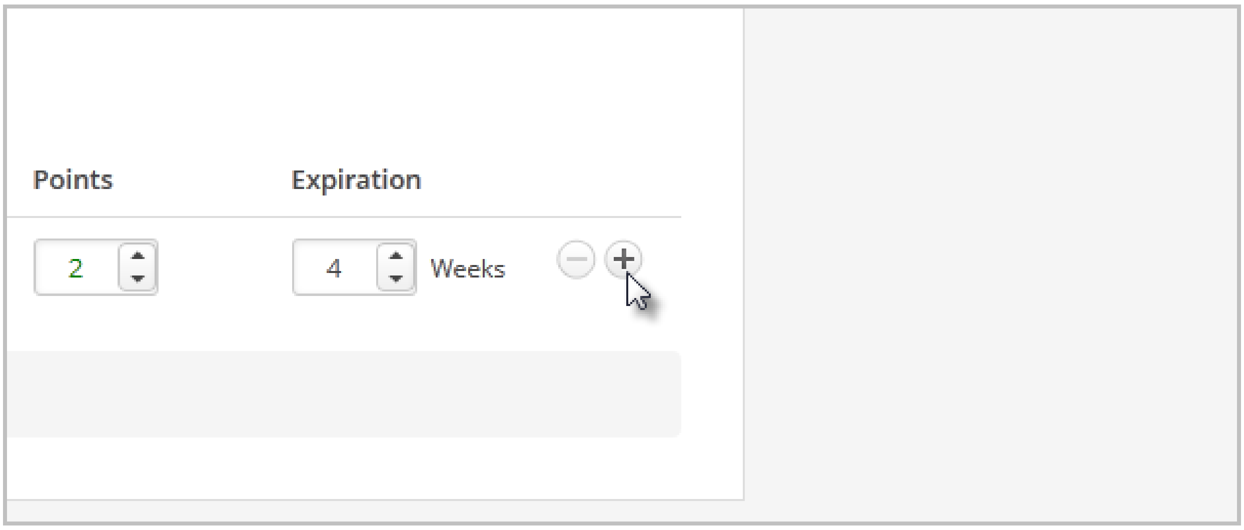
7. Select **Web Form Submission** in the drop-down for the next parameter.



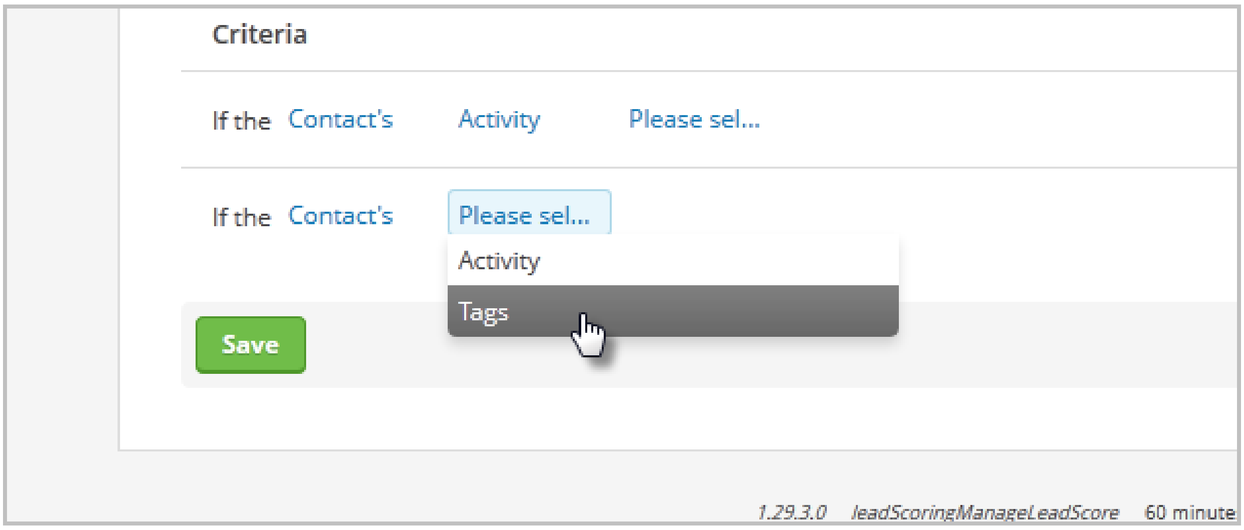
8. Adjust the points and (optionally) set an expiration. We chose to increase the score by 2 points and expire this score in one month (4 weeks.)



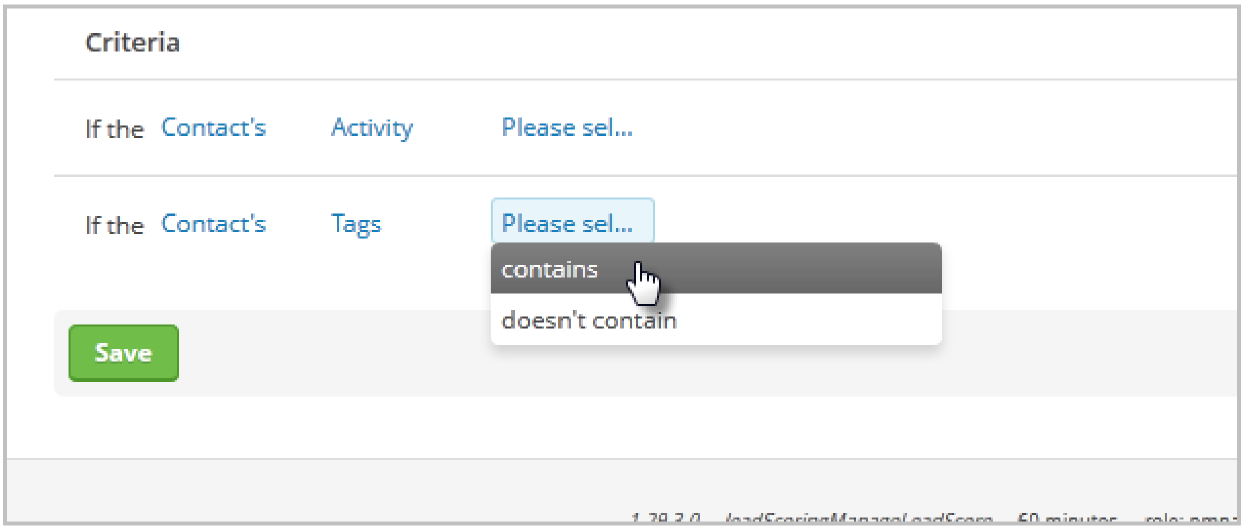
9. Click on the + icon next to the rule we just created to add another rule.



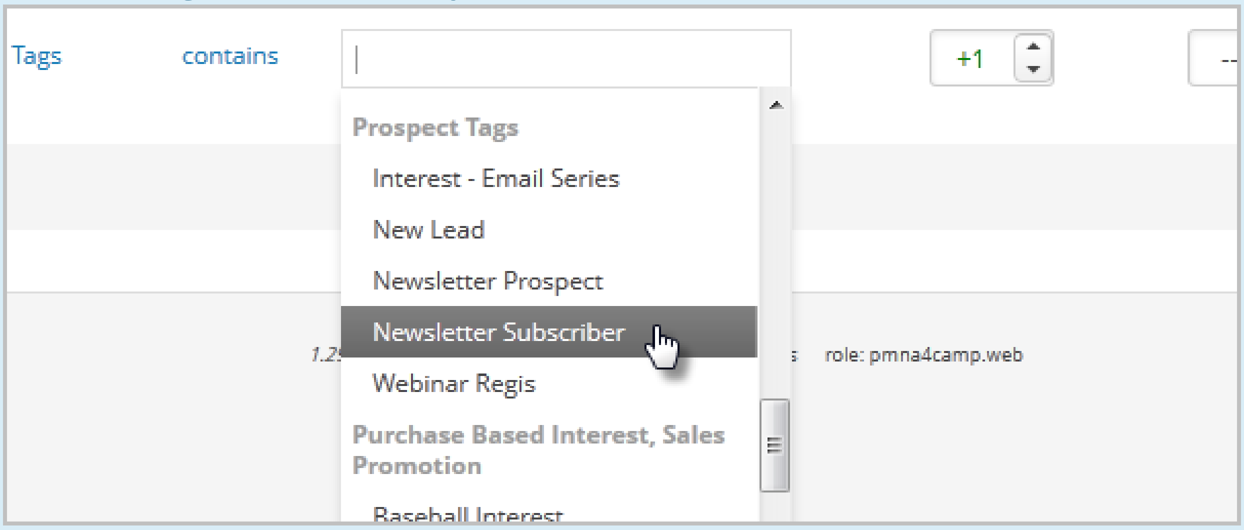
10. Choose **Tags** as the first parameter.



11. Choose **contains** as the next parameter.



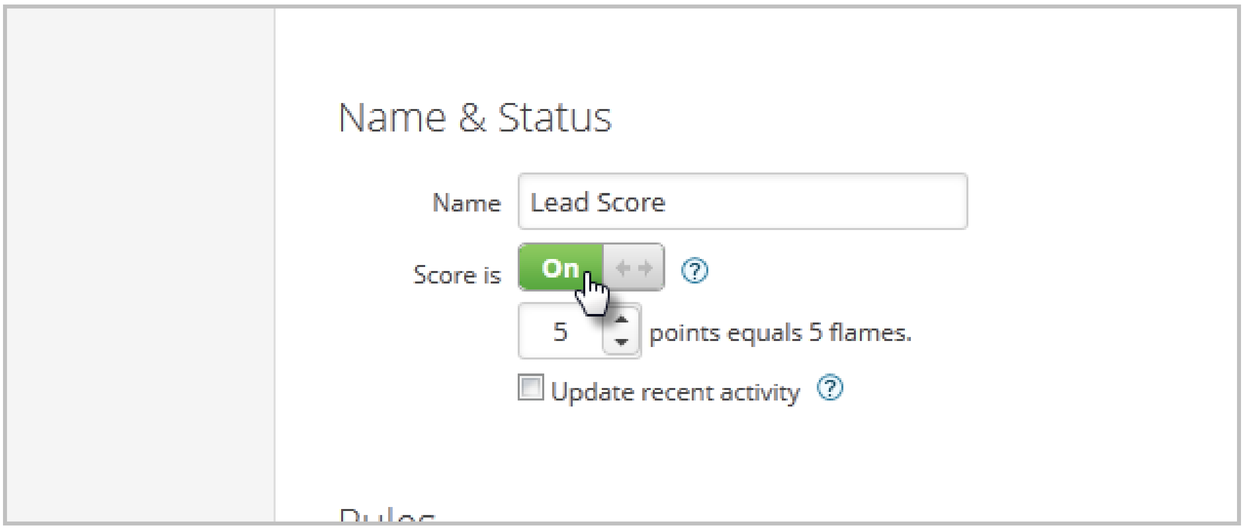
12. Select the tag(s) that will satisfy this rule.



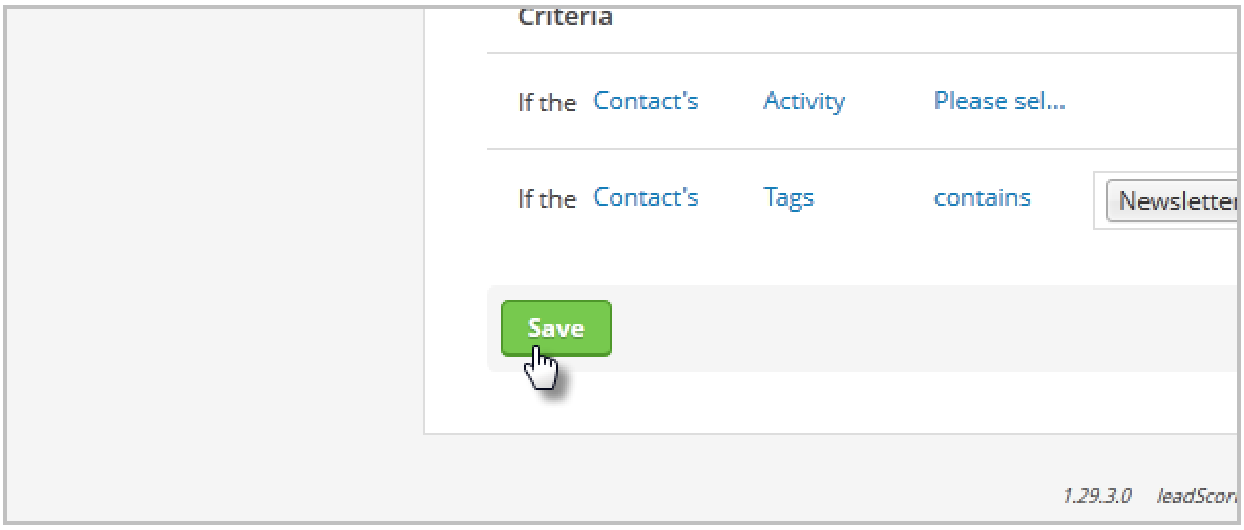
Multiple Tags

If you add more than one tag when defining one criteria line, the system will apply the points as long as the Contact record has at least one of the tags.

13. Be sure the Score is enabled by sliding it to the green *On* position.



14. Click on the **Save** button to enable your changes.



FAQs

- **Question: After creating my scores, why don't they show up on a contact record?**
- Answer: After making changes to your lead scores, Infusionsoft may take up to 20 minutes to update all scores in your Infusionsoft account. The contact record will alert you that it is still updating.

- **Question: If someone submits multiple web forms will each form submission grant more points?**
- Answer: No. A web form submission will only be counted once.

- **Question: If I have two rules in the same contains box, do both need to be true, or only one in order to get the points?**
- Answer: Answer: Only one rule needs to be true in order to get the total points for that rule. If both are true, they will still only get the points you allot for that rule.

- **Question: Can I define multiple scores in my Infusionsoft account?**
- Answer: Presently, you can only have one score per Infusionsoft account.

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Manually Change A Lead Score

Last Modified on 08/02/2018 2:34 pm MST

The lead scoring rules automatically assign values to contacts based on predefined criteria. However, sales reps will have personal interactions with prospects throughout the sales process that may merit a change in lead score.

For Example: A sales rep may contact a "five star" lead and find out they have had to shift focus due to an urgent project with an impending deadline. The prospect is still interested in your product, however they've had to postpone their decision until this project is completed approximately 3 months from now. This prospect may still be a qualified lead, but the sales rep no longer wants that lead at the top of their list.

Sales reps can manually adjust a lead score by manually applying or removing tags from a contact record. Each score criteria can add or subtract up to 10 points. To create a process to manually adjust scores, you will create 20 tags and create a score criteria that corresponds with each tag.

1. Create the following 20 tags and add them to a "Score" tag category. Each tag can be applied to a contact record once.

+1 Lead Point	-1 Lead Point
+2 Lead Points	-2 Lead Points
+3 Lead Points	-3 Lead Points
+4 Lead Points	-4 Lead Points
+5 Lead Points	-5 Lead Points
+6 Lead Points	-6 Lead Points
+7 Lead Points	-7 Lead Points
+8 Lead Points	-8 Lead Points

+9 Lead Points	-9 Lead Points
+10 Lead Points	-10 Lead Points

2. Create a criteria that corresponds with each of the tags. The criteria will add or subtract points from the lead score each time a sales rep manually applies or removes a tag from a contact record.

   For Example: After speaking with the prospect above, the sales rep manually applies a tag to their contact record. The rep decides to deduct 10 points from the lead score because 3 months is a fairly lengthy delay, so he applies the "-10 lead points" tag to the contact record. The contact record is updated and moves down the call list based on the decrease in lead score. If the sales rep does not feel like the prospect has been re-prioritized appropriately, then the rep can apply another tag to decrease the lead score even more.
   Situations are always changing. In this case, the prospect calls the rep two weeks later and indicates their time frame has adjusted again. They are going to be ready to purchase in the next 4 to 6 weeks instead of waiting 3 months. The sales rep can manually adjust the lead score again by either applying a tag that adds points to the lead score OR by removing a tag that subtracted points. For example, a lead score will be increased by 20 total points if a sales rep adds the +10 lead points tag AND removes the -10 lead points tag at the same time.

3. Train your sales reps. Make sure sales reps understand how lead scoring works and how to manually adjust the score based on their discernment and personal interactions with a prospect.

4. Get feedback from sales reps. If sales reps are manually adjusting scores frequently, then you may need to evaluate the lead scoring rules. If a large number of leads are being scored too high, then you may need to decrease the number of points associated with less important activity or increase the ideal lead score.

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Track Sales Rep Activity

Last Modified on 08/02/2018 2:35 pm MST

You can monitor day to day sales team activity through the Call History Summary or Call Log reports (**CRM > Reports > Sales**.)

Call History Summary

The call history summary report lists the number of phone call tasks that an individual sales rep or a sales team has completed within a specific period of time. You can use it to gauge sales team activity and / or evaluate sales rep call volume against a daily / weekly / monthly call metric. You can filter this report by sales rep name, completion date range, sales team, and more. Add the due date and completion date columns to the report to evaluate timeliness in addition to call volume. Note: If you use this report, your reps should schedule calls by creating tasks, in addition to using the next action date in the opportunity record.

Call Log Report

The call log report produces a detailed list of tasks that an individual sales rep or a sales team has completed within a specific period of time. This report includes all of the task types (i.e. call, email, appointment, etc.) and displays links to task records so you can view the custom notes the sales rep entered when completing the task. You can filter this search by action description, task type, completion date range, user and sales team.

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Evaluate Sales Rep Effectiveness

Last Modified on 08/02/2018 2:35 pm MST

There are several Sales Reports (**CRM > Reports > Sales**) that will help you evaluate sales rep effectiveness by individual or team. You can use these reports to educate and strengthen your sales team and see who is best at identifying qualified leads.

Sale Rep Conversion Percentages

The sales rep conversion percentages report shows who is most effective at moving opportunities from stage to stage, by percentage. You can filter this report by date ranges, stages, teams, and individual users. A high move percentage indicates a sales rep is actively engaging with the prospects to keep them from stalling in the pipeline. You can also see the percentage of opportunities that are moved from new opportunity to the "won" stage to see overall close percentage.

Conversion Percentages (created by)

The conversion percentages (created by) report shows who is most effective at identifying and creating qualified opportunities. You can filter this report by date ranges, stages, teams, and individual users. This report displays the move and close percentages based on the person who created the opportunity instead of the responsible sales rep. If you use a qualifying team to filter sales leads, this report can tell you who is most effective at the qualifying process.

Stage to Stage Report

The stage to stage report shows the number of leads a sales rep has moved from one stage to the next within a specific date range. It calculates the average number of days the rep takes to move leads out of the first stage you select based on the total number of days for all of the leads in that stage divided by the total number of leads moved from the first stage into the next. You can filter this report by move date, "from" and "to" stage, as well as sales rep and /or sales team.

Sales Cycle Report

The sales cycle report shows the average number of days an opportunity remains in any given stage. This is a consolidated report that combines the total of number of days opportunities remain in a stage and divides it by the number of stage moves. It lists the sales rep, the total number of opportunities assigned to the sales rep, and the average number of days it takes the rep to move the stage. A low average generally means the sales rep is actively working with their prospects to keep them moving through the sales pipeline. A high average may mean that a sales rep has too many opportunities assigned to them and / or needs training on how to work with prospects more effectively. You can filter this report by sales rep, user group, and date range.

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Sales Team Revenue Reports

Last Modified on 08/02/2018 2:36 pm MST

There are several sales reports (CRM > Reports > Sales) that will help you see how much revenue your direct sales team has generated and forecast future revenue. The revenue reports are based on the value of the product interests recorded in opportunity record s and / or orders placed from an opportunity through a buy now link or the "create an order" method.

Opportunity Revenue Forecast

The opportunity revenue forecast report breaks down the revenue in your active sales pipeline on a per-rep basis within a specific date range.

Potential revenue is included in this report if:

- The sales rep recorded the prospect's interests in the product /subscription program tab of an opportunity record.
- The sales rep commits to the close date forecast in the opportunity record.
- If you associate a close probability with each sales stage, this report will also calculate a weighted revenue (weighted revenue = revenue forecast x stage probability.) The weighted revenue is generally more accurate, as long as your probabilities are a close representation of reality.

You can filter this report by estimated close date, user, and commit status.

Opportunity Sales Report

The opportunity sales report shows the amount of revenue generated by your direct sales team through opportunity records. It will show you the top performers on your sales team based on number of deals, total revenue, and average revenue per deal. It also totals these numbers for all of the sales reps you include in this report. You can filter the opportunity sales report by close date or by user.

Opportunity Pipeline Summary

The opportunity pipeline summary report gives you a big picture view of revenue amounts by pipeline stage and consolidated average number of days for all opportunities that have been in that stage. It can help you evaluate possible bottlenecks in your sales pipeline (e.g. stages where deals get stalled and revenue may be delayed) so that you can refine your sales process to insert additional marketing automation or trigger tasks to remind sales reps to follow up. This report can also include weighted revenue, based on the probabilities you associated with the stages in your pipeline.

Click a number to view details about the opportunities that are currently in that stage.

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Evaluate Lead Flow And Pipeline Effectiveness

Last Modified on 08/02/2018 2:36 pm MST

There are several Sales Reports (**CRM > Reports > Sales**) that will help you evaluate the flow of incoming leads and their movement through your sales pipeline. You can use these reports to work with marketing to manage and improve lead flow as well as improve pipeline efficiency by adding, removing, or modifying stages and stage triggers.

Opportunity Created Detail

The opportunity created detail report provides a sum of opportunities created. You can filter this report by date created, user who created the opportunity, sales rep that owns the opportunity, or sales team. This is a very basic report, but you can add detail to the results by grouping the created opportunities by user, lead source and time frame (i.e. day, week, month). Note: These additional criteria are found under the columns tab of the search criteria screen. You may need to create a custom opportunity search to see more custom information.

Sales Pipeline Summary

The sales pipeline summary report is a very basic report that shows the number of opportunities moved into and out of each stage within a specific date range. You can filter this report by date range and sales team. You may need to create a custom opportunity search to see more custom information.

Sales Pipeline Detail

The sales pipeline detail report shows stage movement details within a specific date range. You can filter this report by date range, from / to stages, and sales team. The results can include rep name, from / to stages, current stage, and move date.

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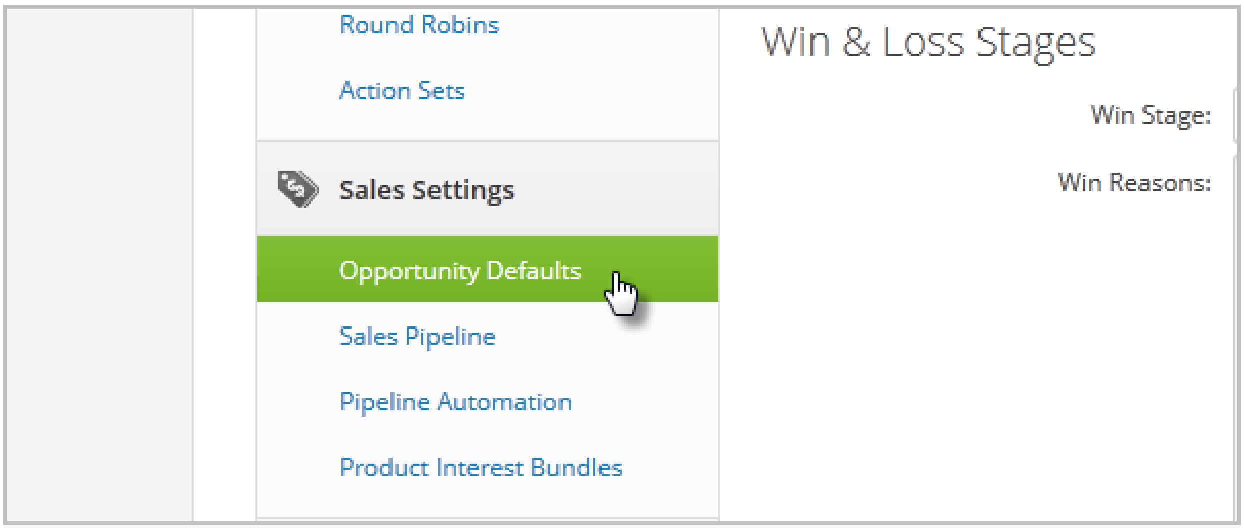
Track Opportunity Win And Loss

Last Modified on 08/02/2018 2:36 pm MST

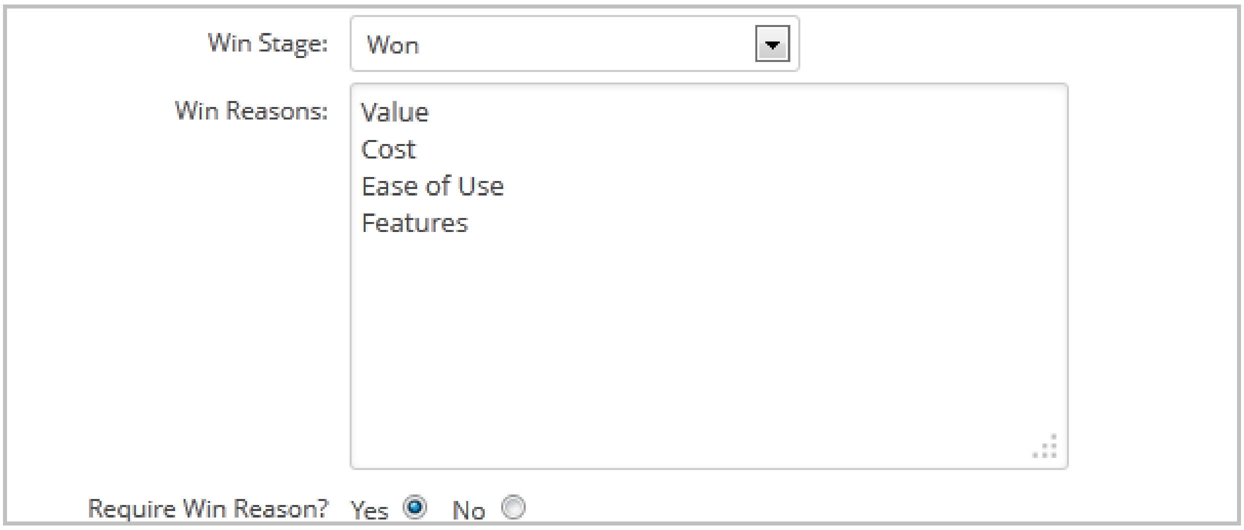
Tracking the reasons prospects do or do not buy from you will help you refine your sales and marketing strategy. It will enable you to proactively address common objections (loss reasons) and reinforce your strengths (win reasons) throughout the lead nurture and conversion process. It can also help you collect intelligence that can lead to product and /or service changes that will make your company more attractive than your competition. The win/loss data is stored in individual opportunity record s and can be used in opportunity searches (CRM > Opportunities.)

1. Go to **CRM** > **Settings** in the main navigation menu.

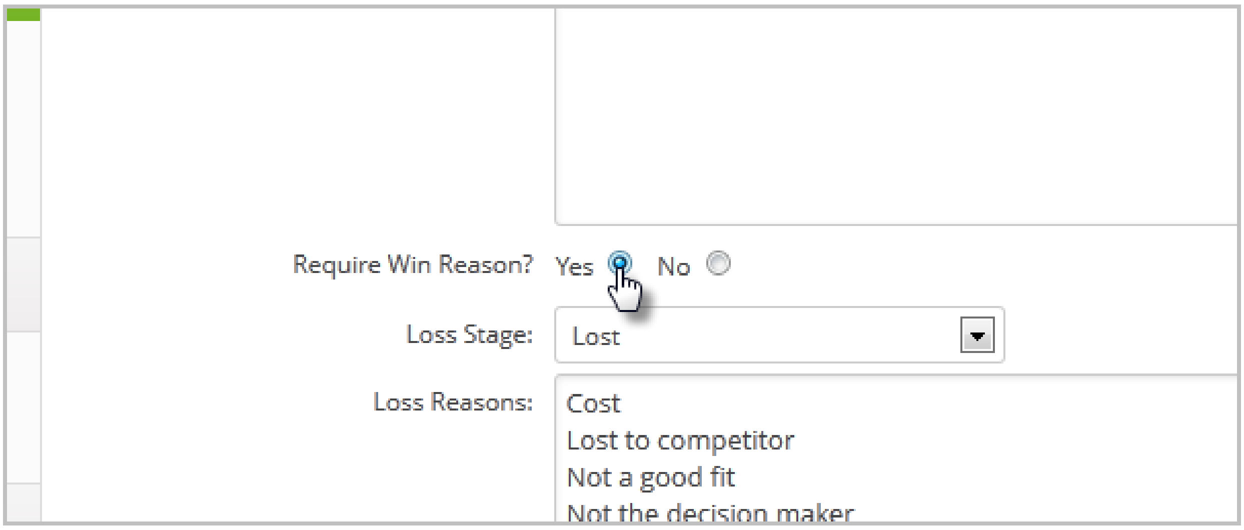
2. Click on **Opportunity Defaults** in the settings menu.



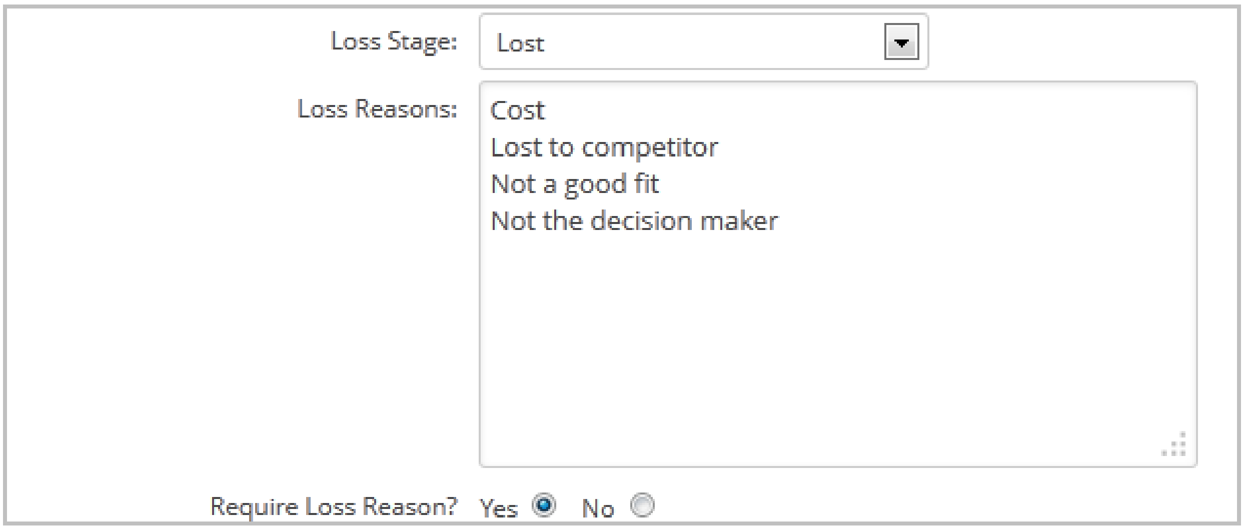
3. Select your *Win* Stage from the drop-down and enter a list of known *Win Reasons* (you can add more later.)



4. (Optional) Select *Yes* to require a win reason when a sales person moves the opportunity to the Won stage. When a sales rep moves an opportunity record to this stage, the win reasons will show up in the opportunity record. If you require a win reason, the sales rep won't be able to save the opportunity until they select a reason from the list.



5. Select the *Loss Stage* from the dropdown and enter a list of known *Loss Reasons* (you can add more later.)



6. (Optional) Select *Yes* to require a loss reason when moving the opportunity to this stage.

7. Click **Save**

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An Introduction to Referral Partner Management

Last Modified on 08/02/2018 2:37 pm MST

The Infusionsoft Referral Partner component helps you extend your marketing reach through partner relationships. It includes tools to help you enroll, equip, track, and reward the referral partners (affiliates) who help sell your products. It works hand-in-hand with the CRM and E-Commerce components to automatically track referrals and commissions.

Referral Partner Center

Upload banner ads, emails, and other collateral for your affiliates to use in their marketing efforts. Partners sign in to the Referral Partner Center to access these marketing materials and to view their tracking statistics (i.e. link clicks, opt-ins, sales.)

Reporting

Reporting tools that allow you to see the number of new leads your partners are driving to your site and automatically tracks the partner as the referral source so you know whom to pay when the sale is made.

Tracking

Automatic tracking that calculates commission payouts and produces ledger reports that tell you how much to pay partners so you can issue payments through your bookkeeping system, PayPal, etc.

MLM

Ability to create a tiered structure that encourages partners to recruit other partners for your program. The "parent" partner can receive commission for sales made by the people they recruit (the "child" partner.)

Enroll Referral Partners

Use Infusionsoft web forms to set up a new referral partner account in Infusionsoft, assign them to a commission program, and automate follow up.

Track Productivity

The Referral Partner component automatically tracks online partner referrals through tracking links. Referral partners log into an Affiliate Center to access their tracking links and other marketing resources, like emails and website banners. They can also monitor their own activity by accessing reports that give them real-time information about the number of leads they send to you and those that convert to sales.

Pay Commissions

Infusionsoft tracks affiliate-generated sales and automatically calculates commissions based on the programs you set up. The commission programs pay out a flat fee or a percentage based on the price of the product(s) sold. You can run a ledger report each payment period to view commissions due. After you send referral partner checks or pay them electronically, you can zero-out ledger balances by marking the ledgers as "Paid."

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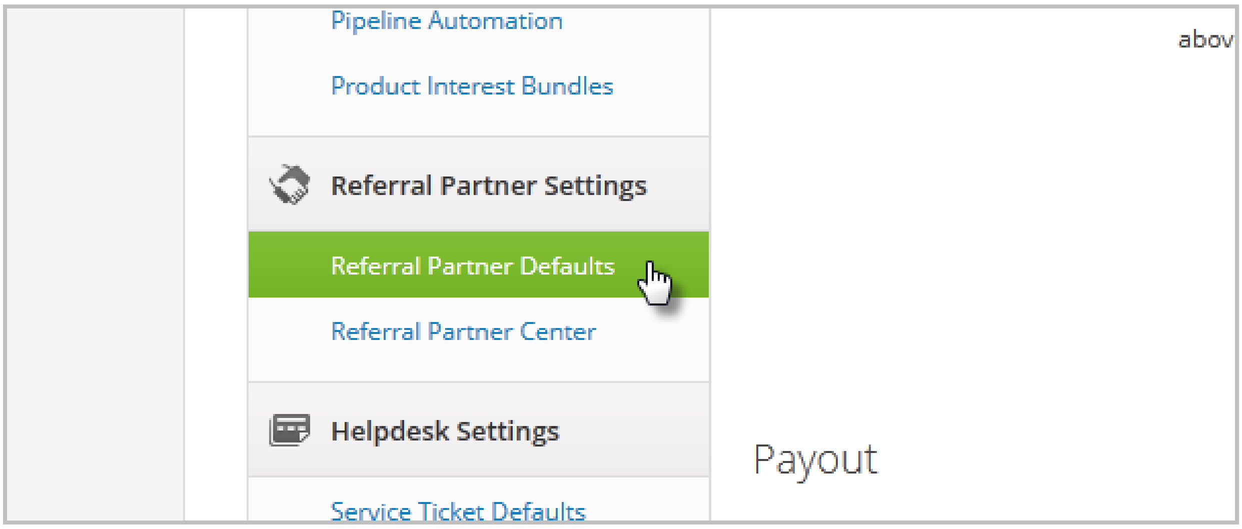
Referral Partner Tracking & Payout Options

Last Modified on 08/02/2018 3:37 pm MST

The first step to set up a referral partner program is to go through the **Partner Default Settings** page and choose how you want to track referral partners and how your payouts work.

1. Go to **CRM** > **Settings** in the main navigation menu
2. Click on **Referral Partner Defaults** in the settings menu.



3. **Referral Partner Code Prefix** simply adds a special prefix that is applied to all URLs that are generated for your referral partners. This is optional.

4. **Skip notifications on orders and web forms?** - This setting allows you to turn off email notifications that referral partners receive when someone they referred to you buys something or fills out a web form.

5. **How to choose a referral Partner**: This setting allows you to manage which referral partner gets credited if a prospect clicks on links offered by multiple referral partners. By default, Infusionsoft assigns commission to the *latest (or last) referring partner.* **Latest referring** is the most commonly used setting for this situation, but you can change it to *first referring* if you prefer to give credit to the referral that got the first click.

6. **Referral Partner tracking method**: By default, Infusionsoft identifies the referring partner based on a tracking cookie on the referral's computer. If you want the Referral partner to be automatically credited for future sales despite not being cookied, change this to **Referral history and cookies.** When a sale is made, Infusionsoft will check the cookie first, then the referral partner history. If you **only** want to pay referral partners for cookied sales, change it to **Only cookies.**

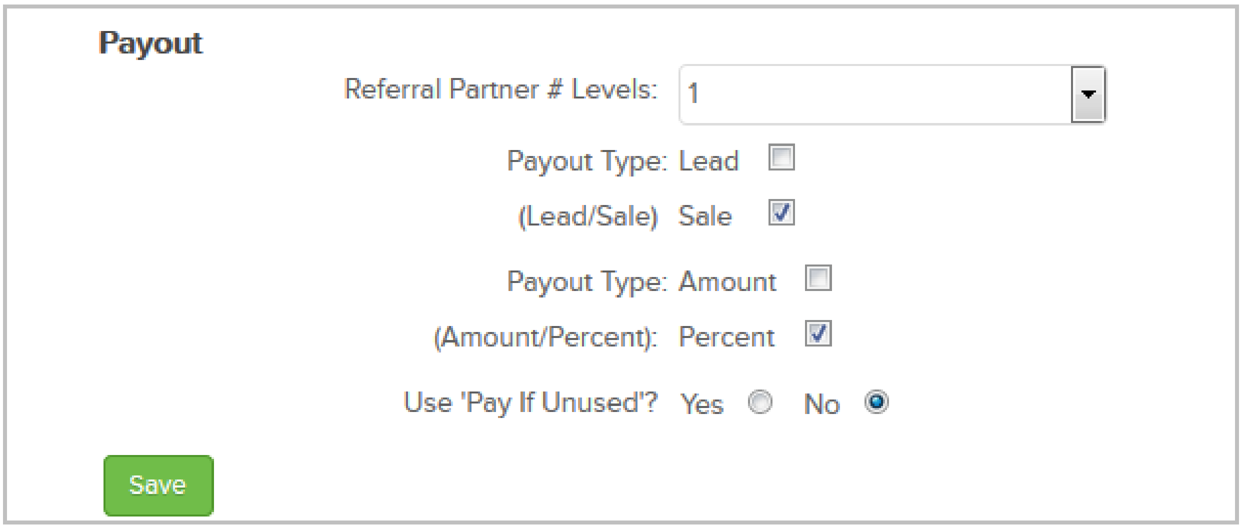
7. **Use IP Address**: This is just another backup mechanism as above for paying referral partners for subsequent orders their referrals make. This is optional. Infusionsoft will check for a cookie, then the referral partner history, then IP address.

8. **Custom Referral Partner Link URL**: This setting is covered here.

9. **Referral Partner # of Levels**: The default setting is **2**. This means that a partner who recruits (parent affiliate / level 2) other referral partners for you (child affiliate / level 1)

is eligible for commission on the sales their recruits make. Change this setting to **1** if you do not plan to pay commissions to more than one referral partner for each sale.

10. **Payout Type (Lead/Sale):** Referral commissions are calculated after a sale takes place in Infusionsoft; however, if you are using referral partners to drive leads to a direct sales team, you may want Infusionsoft to calculate a commission both for the partner who referred the lead and the sales rep who closed the deal. In this case, you would check both boxes. Just having the sale commission box checked is most typical.



Please Note! Infusionsoft does not automatically pay commission on a lead - a sale must be made in order for a commission to be paid in Infusionsoft.

11. **Payout Type (Amount / Percent):** You can pay referral partners a flat dollar amount or a percentage of the sale or both.

12. **(Optional) Use "Pay if Unused?":** You can ignore this setting and set it to No. It only applies to commission structures that have more than one partner level (see above) and who need to pay an additional commission to a sale partner when they make a sale that does not involve a level 2 or level 3 partner.

13. Click on the **Save** button to apply the updates. This will update all of the existing referral partner program records.

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Create a Commission Program

Last Modified on 08/02/2018 2:38 pm MST

A commission program defines the payment structure for a specific group of referral partners. You can create multiple programs, each with its own set of commissions and products. The commissions apply to every partner enrolled in the commission program; however, you can override program commissions for individual cases.

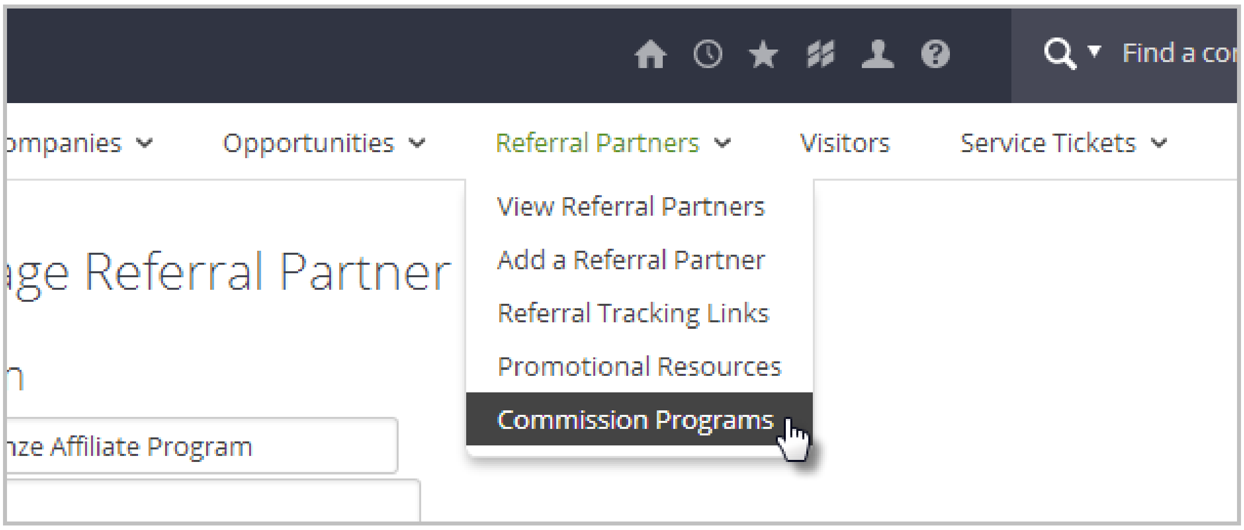
Commissions are calculated based on the price of the product(s) purchased. They do not factor in any additional fees, such as shipping and/or taxes.

Important Note on Finance Charges! When an order is placed that will payout commissions and the order has a finance charge, the payments will first pay off the finance charge before being applied to the commissions.

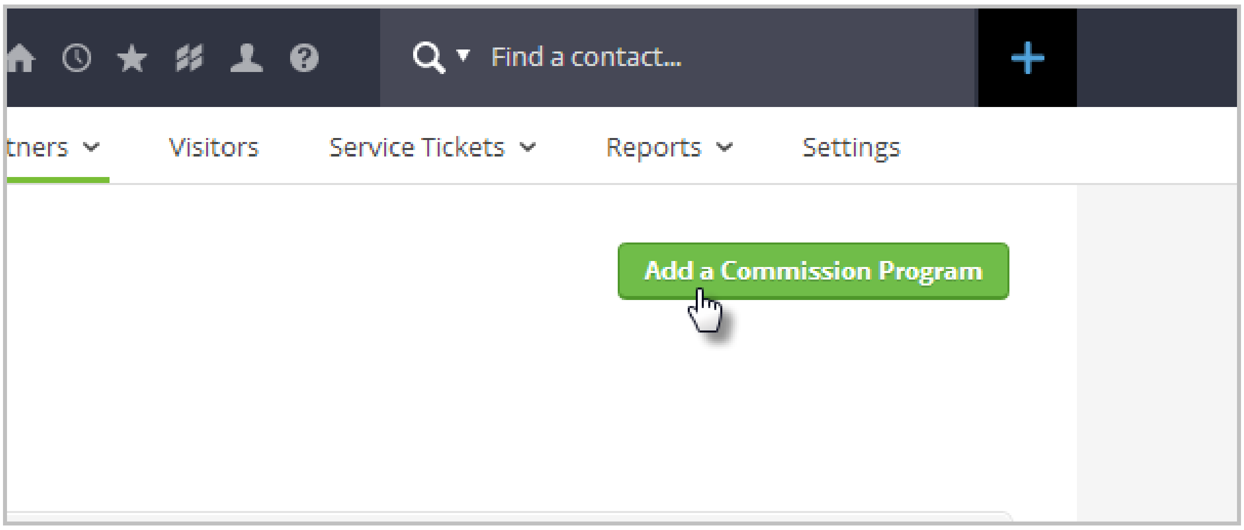
Pro-Tip! How much commission do you want to pay for your products/services? Commission is usually based on the partner's lead quality, lead volume, and your profit margin for the products involved. It also involves understanding what kind of commissions motivate a specific type of partner (e.g. a referral partner vs. a strategic partner.)

1. Go to **CRM** > **Referral Partners** in the main navigation menu.

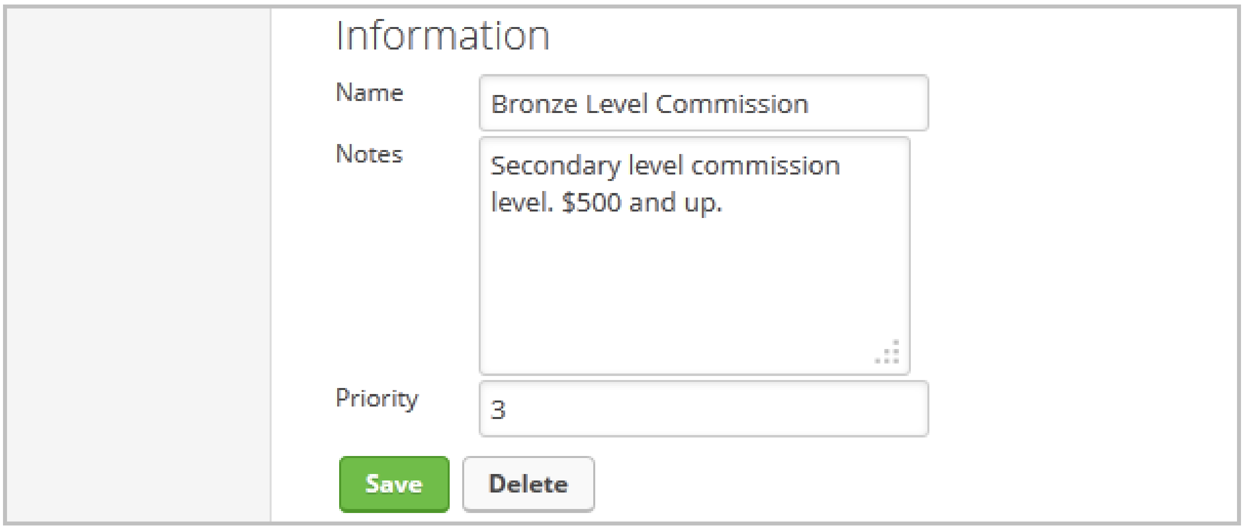
2. Select **Commission Programs** from the Referral Partners menu.



3. Click on the **Add a Commission Program** button to create a new commission program.



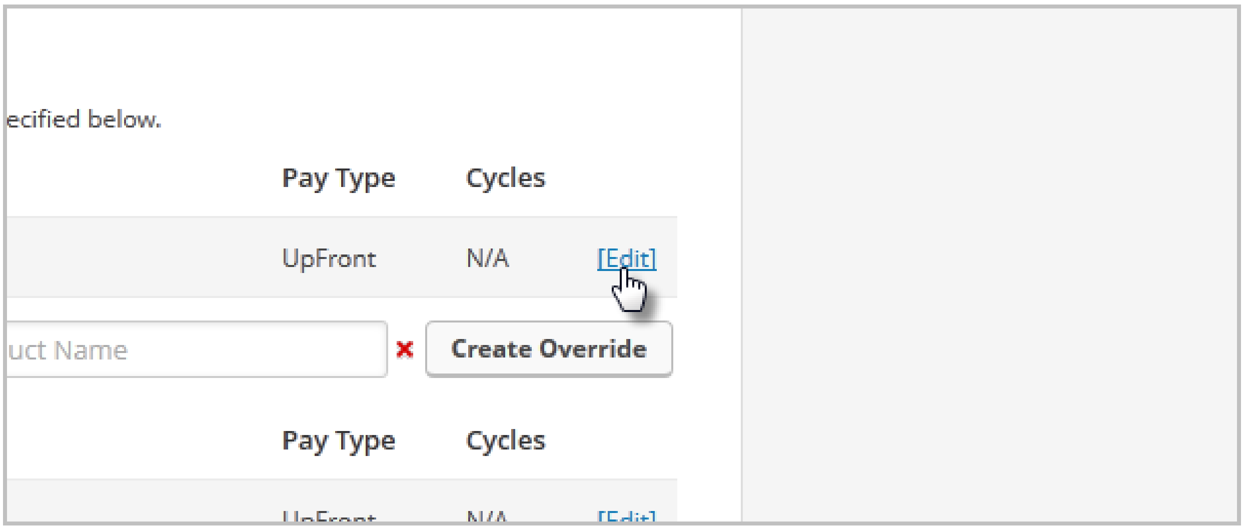
4. Enter the **Name**, **Notes** and **Priority Number**: These serve as identifiers so that you and your partners can identify the program and recall summary level details. If your partners have access to their program information in the Referral Partner Center, they will be able to see this information.



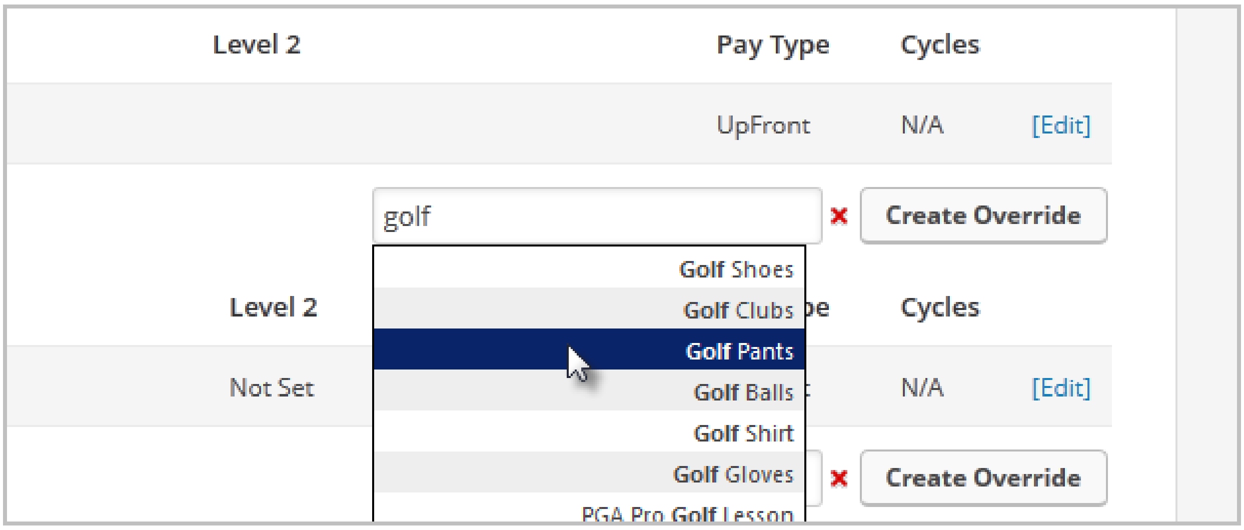
Priority Number - The priority number determines which commission program takes precedence if a partner is enrolled in more than one program. **Programs with lower numbers will have higher priorities** that those with higher numbers. If a partner is enrolled in a program with a priority number of 1 and a program with a priority number of 15 and both programs have a commission set up for a product that the partner promotes, then the partner will get a commission based on the program with the priority number of 1. **In most cases, the programs with a lower priority number pay the higher commissions. If a product commission override is set up for one program, but not the other, then the program with the commission override takes precedence (regardless of priority numbers.) "0" is the highest priority.**

5. Click on the **Save** button. Note that there are three ways to define commission payouts (default commissions, product overrides, subscription program overrides). You can choose to use one option or a combination of two or three.

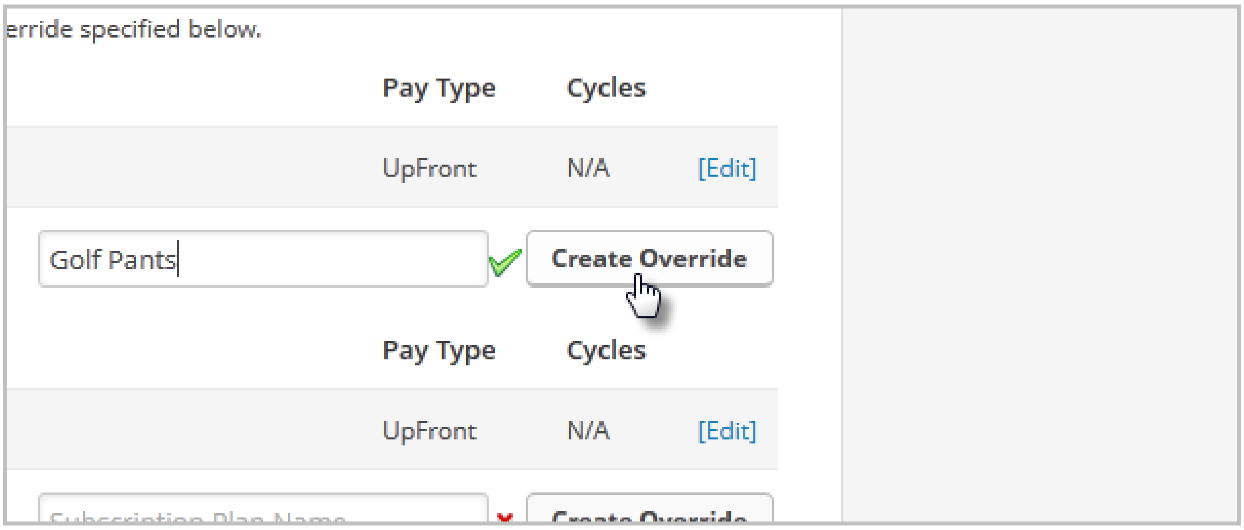
6. Go to the **Default Commissions** section. These commissions apply to ALL of the products AND subscription programs you sell in Infusionsoft. Create a default commissions if you pay the same commission amount or percentage for all or most of your products. This will save you time because you only need to create overrides for the exceptions to the default commissions. The default commissions will also apply to each new product or subscription program you add in the future. You can just delete the default commission if you only want to assign one or a few specific products to the commission program and not pay commission on anything else. To make changes to the default commissions, click the **Edit** button. Or, just delete the default settings altogether if you only want to pay commissions on a few products.



7. Enter the name of a product into the search box and click the name of the product to select it.



8. Click the **Create Override** button to enter a commission for this product.



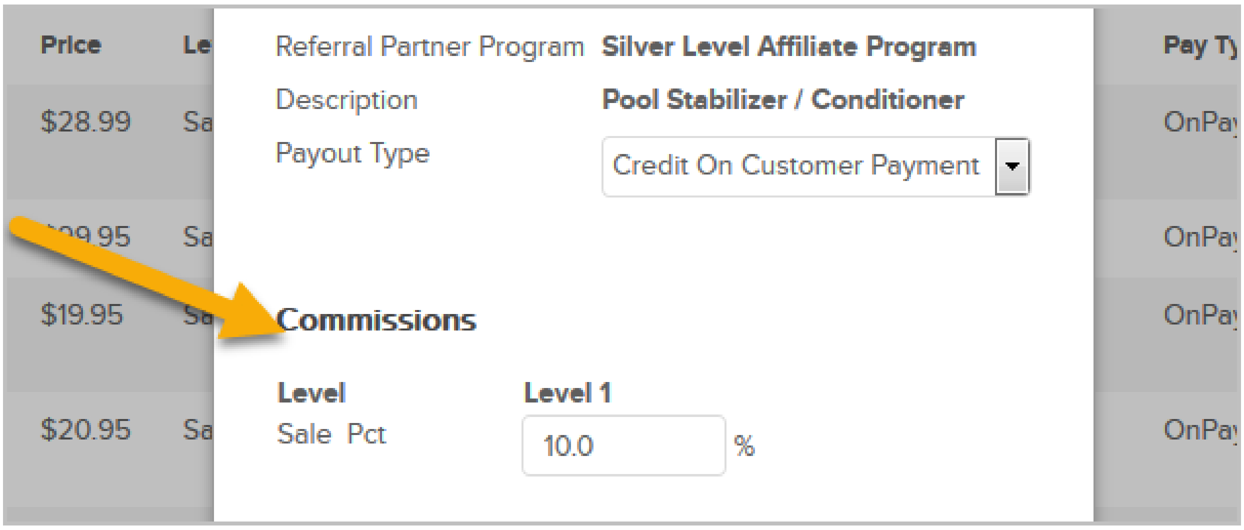
9. **Payout Type: Credit on Customer Payment**: If you choose this option, the partner will

not get credit for the sale or receive any commissions until after the customer pays the total amount due. For one time orders, this is the full purchase amount. For subscriptions, this is the amount due on the first billing cycle. This is the most typical setting.

10. **Payout Type: Up-Front Credit in Full**: If you choose this option, the referral partner will get credit for the sale when the sale is made, even if there is a balance due after the purchase (e.g. they choose a payment plan.)

11. (Optional: For Subscriptions Only) Pay commissions for: Enter a Cycle limit. This setting gives you the ability to limit the commission on subscription programs to a specific number of billing cycles. The default is 0, meaning the partners are eligible for commissions every time the customer pays a recurring charge related to a subscription program. Change this number if you want the referral partner to receive commission only on the first payment (enter 1) or for a limited number of payment cycles. Most typical is to pay the referral partner for the first cycle or the first 2 or 3 cycles.

12. Enter the payout rules for the lead and/or sale partner for each affiliate level (if you have the multilevel referral partner setting enabled.) The Level 1 commission goes to the partner who makes the sale. The Level 2 commission goes to the partner who recruited the partner who made the sale and so on. Note that this dialog may look different in your account than mine...what options are available is based on how you set up your tracking and payout settings.



13. Repeat these steps to add commission overrides for additional products.

14. Go to the *Subscription Program Commissions* section and follow the product commissions instructions above to create overrides for products with subscription plans.

15. Click the **Save** button.

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Referral Tracking Links

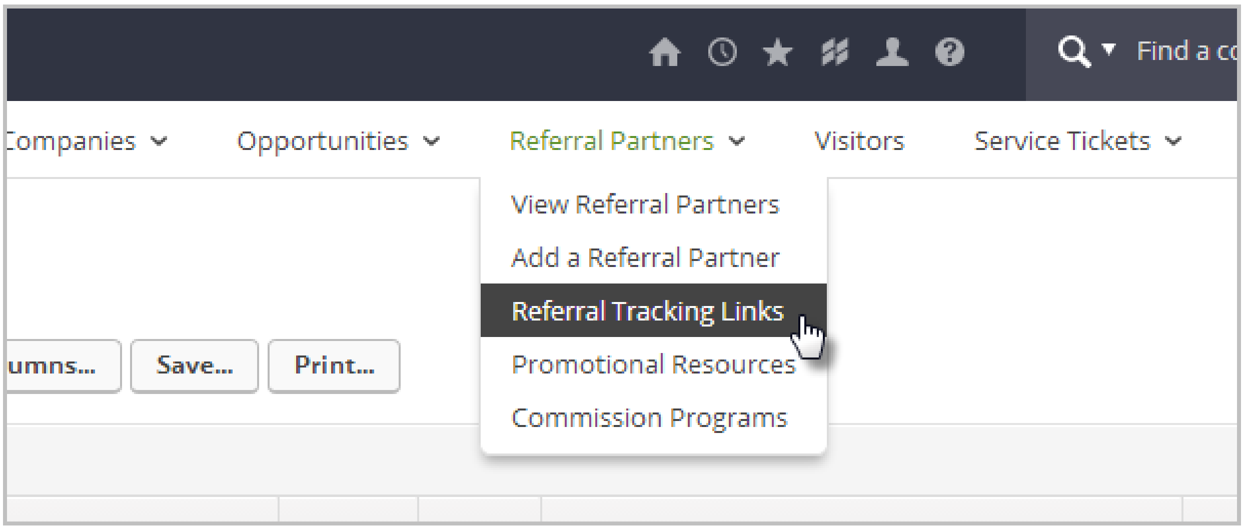
Last Modified on 08/24/2018 9:32 am MST

Referral tracking links are links to your websites, landing pages, order forms, etc. that your referral partners use to send prospects to your business. The link itself includes a code that tracks which partner sent the prospect to you. The links should drive traffic to a page where a prospect can sign up for a free offer (so you can start following up yourself) or make a purchase. The referral tracking links are also embedded in promotional banners and emails.

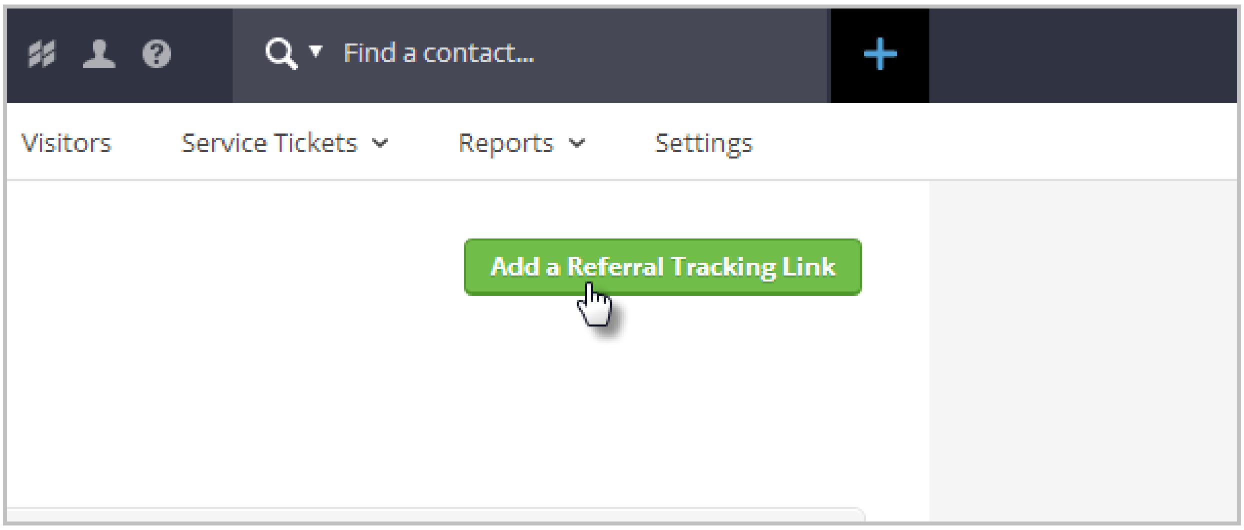
Note! Referral Tracking Links are currently not supported within the new Landing Page builder.

You create referral tracking links in Infusionsoft and give your partners access to them via the Referral Partner Center.

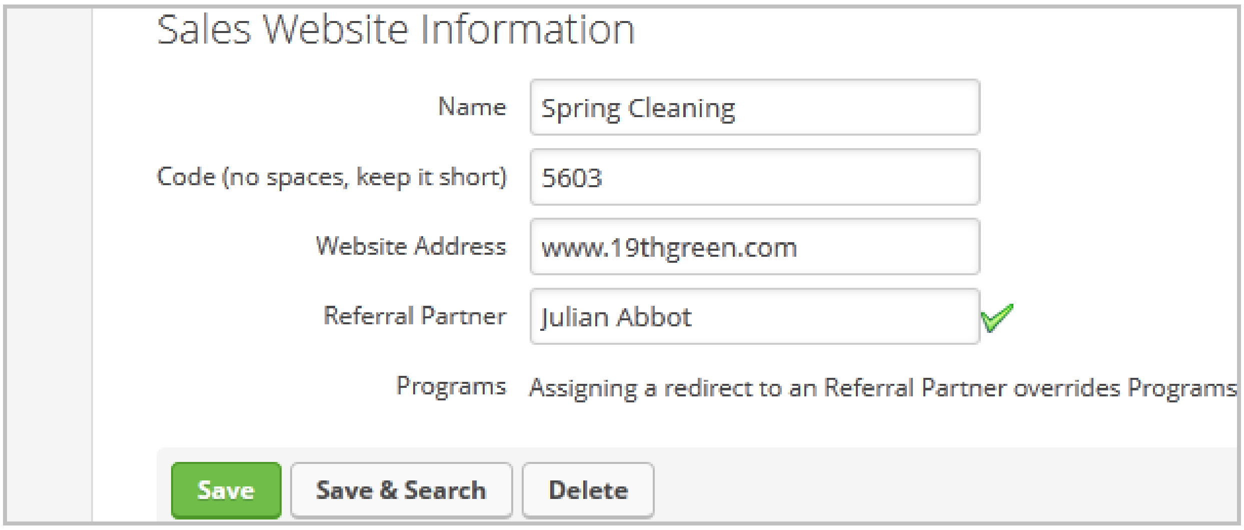
1. Go to **CRM** > **Referral Partners** in the main navigation menu.
2. Select **Referral Tracking Links** from the Referral Partners menu.



3. Click on the **Add a Referral Tracking Link** button.

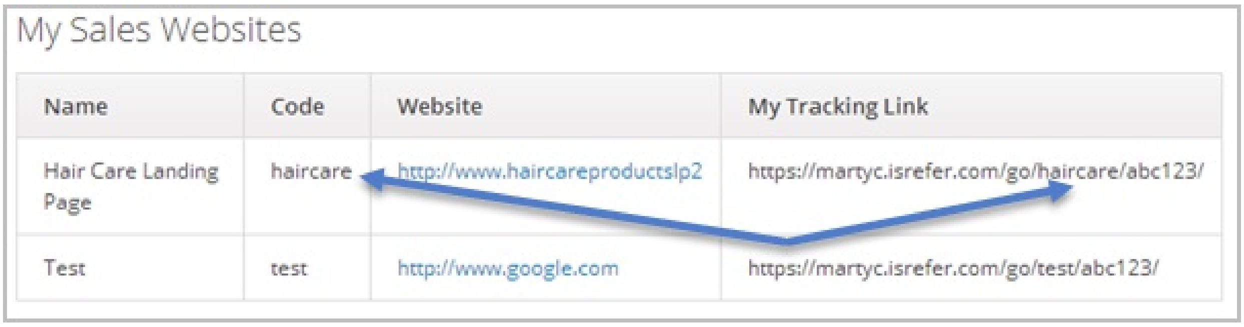


4. Enter the Sales Website Information.



This can be a website, landing page, online store, order form, product link, etc.

- Name: Enter the name of the web page, product, etc. Partners will see the name when they view a list of links in their Referral Partner Center. The name should make sense to you AND to them.
- Code: The code is part of the tracking link and is used by you and your referral partners to identify what page the link is pointing to. In the example below, the code is "haircare". A partner using this link will know that it goes to the "haircare" landing page. This is what the referral partner will see in the Referral Partner Center:


My Sales Websites

Name	Code	Website	My Tracking Link
Hair Care Landing Page	haircare	http://www.haircareproductslp2	https://martyc.isrefer.com/go/haircare/abc123/
Test	test	http://www.google.com	https://martyc.isrefer.com/go/test/abc123/

- **Website Address:** Enter the URL for the destination web page (e.g. http://www.google.com.) This is the page that the partner's referrals will visit to sign up for something or to make a purchase.
- (Optional) **Referral Partner**: If this link goes to a co-branded landing page or an order form with a discount for a specific partner, then you don't want other partners to see or use this redirect link. Enter the partner's name and click on it from the results list. If you use this option, only one partner can use this tracking link.
- (Optional) **Programs**: Click on the name(s) of the programs to limit access to the link so that only the referral partners in those programs can use it this tracking link. Hold down the Ctrl key on your keyboard to select more than one program. Note that if you don't select any program, the link will be applied to ALL programs.

5. Click on the **Save** button to add or update the referral tracking link. This will automatically update the Referral Partner Center links for all eligible partners. You can preview the link by creating a referral partner record for yourself, adding yourself to all of the relevant programs, and logging into your referral partner center.

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Merge Referral Partner Info Into Emails

Last Modified on 08/02/2018 2:39 pm MST

There are 2 types of referral partner merge fields: Referral Partner Fields and Referral Partner's (Contact) Fields. These merge fields can be used to personalize Email, Letter, and Task Templates. These merge fields work just like any other template merge fields. You are able to merge in the following standard partner fields and any custom referral partner record fields you create: Referral *Partner* Fields and Referral *Partner's* Fields.

Referral *Partner* Fields

These fields pull information from the referral partner record associated with the person you're communicating with. You'll use these merge fields in partner follow up messages and/or internal notifications. The Referral Partner Fields include:

- **Aff Name**: Merges in the referral partner name, which may be different from the person's name if the partner record created manually. The referral partner name, might be an organization name instead of an individual's name.

- **Aff Code**: Merges in the referral partner's code. This code serves as a "username" when the affiliate logs into the Referral Partner Center. It is also part of every referral tracking link. If you are not using the partner center, you can use this merge field to send a redirect link by email.

  For Example: The referral partner code is the only thing that differentiates one referral tracking link from another. The default format for a tracking link is: https://ices.infusiontest.com/go/FBVS/**dcamp**. In this link, **dcamp** is the partner's code. You can send this link in an email by replacing the actual code with a merge field (~Affiliate.AffCode~) https://ices.infusiontest.com/go/FBVS/**~Affiliate.AffCode~**. When you send the email to a group of referral partners, each partner's unique code will be merged from their referral partner record.

- **Password**: Merges in the partner's sign in password. They need this password to log into the Referral Partner Center.

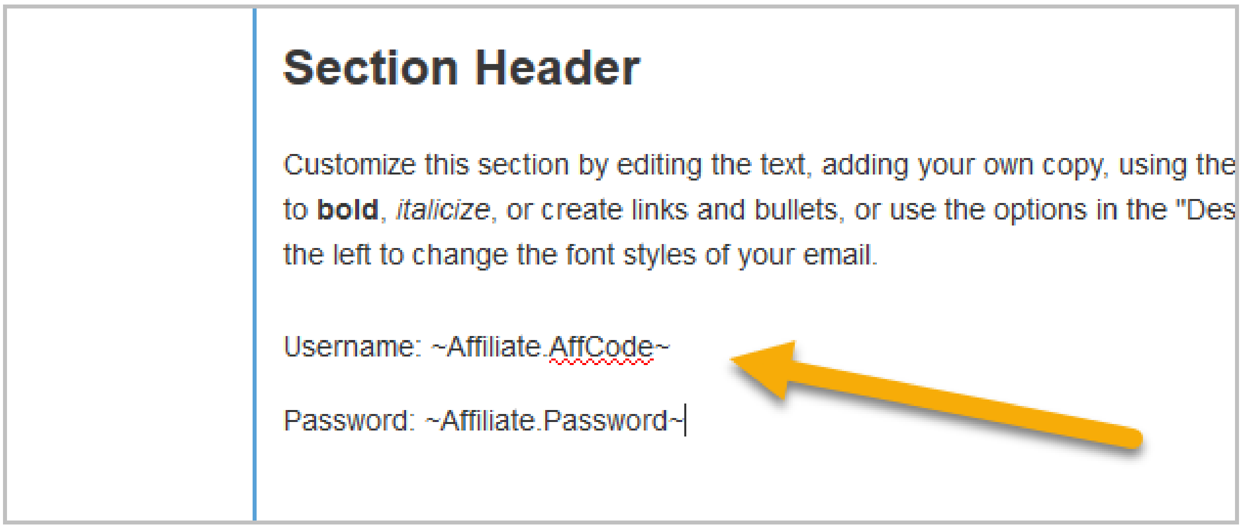
- **Notify Lead or Notify Sale:** Merges in the affiliate's email notification preference. They cannot change these preferences themselves, but you can change them upon request by editing a referral partner record.

- **Lead Cookie For:** Merges in the Credit Window. The Credit Window limits the number of days a partner is eligible for lead or sale commissions after one of their referrals clicks on an affiliate redirect link.

To use these fields in an email,

1. Click inside the email where you would like to enter the merge field
2. Click the Merge button in the blue bar
3. Select Referral Partner Fields
4. Select the Merge Field

For example, this would merge in the username and password of the referral partner.



Referral *Partner's* (Contact) Fields

These fields pull information from an affiliate's contact record instead of their partner record. The information is pulled when a follow-up sequence or broadcast is sent to a list of prospects or customers. These merge fields can be used to send a personalized Thank You to a partner when one of their referrals opts-in or buys, for internal notifications, to cc partners on the communications you send to their referrals, etc. There is a generous list of merge fields to choose from.

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Track Referral Activity Via The API

Last Modified on 08/02/2018 3:38 pm MST

The Referral Partner component is integrated with Infusionsoft web forms, order forms, and shopping cart. If these Infusionsoft features are used, the referrals are tracked automatically based on clicks on the referral tracking link, opt-ins, and purchases. If this is true, the information in this article isn't needed.

If the Infusionsoft API is used to integrate with an outside lead capture (e.g. a quoting system) or order system (e.g. a custom shopping cart), then referral tracking must be implement through the following modifications:

Standard Referral Tracking Link Modification

Infusionsoft has a built-in referral tracking link that will

- Read the referral cookie
- Send the person to the destination URL
- and add the referring partner's ID number as a parameter in the URL

If the API is being used with with lead capture forms or orders, use this modified link format to create referral tracking links in Infusionsoft (**CRM > Referral Partners > Referral Tracking Links**). Instead of entering the simple URL for the destination website (e.g. http://www.example.com), enter the modified redirect (e.g. https://appName.infusionsoft.com/aff.html?to=http://www.example.com.)

Here is an example of the modified redirect link URL:

https://appName.infusionsoft.com/aff.html?to=http://www.example.com

If the prospect clicking on this link has a referral cookie stored on their browser, the partner will land on a page with a URL something like this:

http://www.example.com?affiliate=1234

The destination URL matches the one at the end of the redirect link and the referring partner's ID is part of the URL. If no cookie is found, the referral partner ID number is set to zero.

> **Please Note!** Code will need to be written that will pull the referral partner id from the url. The Id will then be used to add a referral record to the contact or give credit for a sale or both when the API call is made.

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Customize The URL Of A Referral Tracking Link

Last Modified on 08/02/2018 3:39 pm MST

By default, the referral tracking links use your Infusionsoft account app name as the base URL: https://**iuejl33**.isrefer.com/go/training/jordanh. You can override this default prefix with a custom one by following the directions below:

Start by copying the following code and paste it into a text editor (e.g. Notepad.) Customize the Infusionsoft app name URL (bolded in the code below) and then save the file with a .html extension (e.g. referral.html.) This code is also found under **CRM** > **Settings** > **Referral Partner Settings** > **Referral Partner Defaults** in your Infusionsoft account.

1. Log on to your hosting administration panel (e.g. GoDaddy) to upload the file to server connected to the custom URL (e.g. homerunhouse.com). This will create a web page URL that looks something like this: http://homerunhouse.com/referral.html Note: Your website administrator may need to help you with this step. You can send your webmaster the code as an email attachment.

2. Log back into Infusionsoft

3. Go to **CRM** > **Settings** > **Referral Partner Settings** > **Referral Partner Defaults**

4. Go to the *Tracking* section.

5. Enter the URL from #2 into the custom referral partner link URL field, including the http:// (e.g. http://homerunhouse.com/referral.html.)

6. Click on the **Save** button to apply the update. This will automatically update all of the redirect links for all of your affiliates.

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Pay if Unused

Last Modified on 08/02/2018 3:40 pm MST

You can find this setting by going to: **CRM > Settings > Referral Partner Settings > Referral Partner Defaults.** It is recommended to leave this setting "off" unless you meet the following criteria:

This setting only applies to unique situations in which a company, who has a multilevel payout system, needs to pay extra commissions to referral partners who make a sale not involving another level.

This is how referral commissions are calculated if **pay if unused** is set to **Yes**:

This referral partner program has 2 levels. This means that the partner who makes a sale is eligible for commission AND the partner who recruited that referral partner (the parent partner) is also eligible for commission. This program also has "pay if unused" enabled and has a value entered into that field in the referral program record.

Level 1 Commission = 20%: This goes to the partner who makes the sale (the child partner).

Level 2 Commission = 10%: This goes to the partner who recruited the partner who makes the sale (the parent partner).

Pay if Unused = 50%: This is the amount of commission you want to pay out. This percentage overrides the Level 1 commission, if there is only a level 1 partner. If there is more than one partner to pay, the system awards additional commission to the level 1 partner when there is an unused portion.

Scenario 1

Partner "Bob" makes a $1000.00 sale, but no other partner was involved in recruiting him for your program. There is no Level 2 partner (parent). Bob will receive a 50% payout, even though the Level 1 Commission is only 20%. Bob will receive 500.00. If "pay if unused" was disabled, he would only receive $200.00 (20%).

Scenario 2

Partner "Jim" makes a $1000.00 sale. Jim (child partner) was recruited into your program by partner "Bob" (parent.)

Bob is the Level 2 partner. He did not make the sale, but is eligible for commission on the sale Jim made. Bob will receive a 10% commission, in this case, $100.00.

Jim is the Level 1 partner. He made the actual sale. His commission will be calculated using the "pay if unused" value (see below)

Step 1: Determine "unused" value for the $1000.00 sale:

Pay if unused (50%) minus Level 2 Commission (10%)

50% - 10% = 40%

$500.00 - $100.00 = $400.00

Step 2: Calculate Level 1 commission for the sale, factoring in the "pay if unused" value.

Unused value (40%) plus level 1 commission (20%)

$400.00 + $200.00= $600.00

The total payout for this scenario is $700.00. When **pay if unused** is enabled, you end up paying out more commission than you otherwise would.

Level 1 to Bob: $100.00

Level 2 plus **pay if unused** to Jim: $600.00

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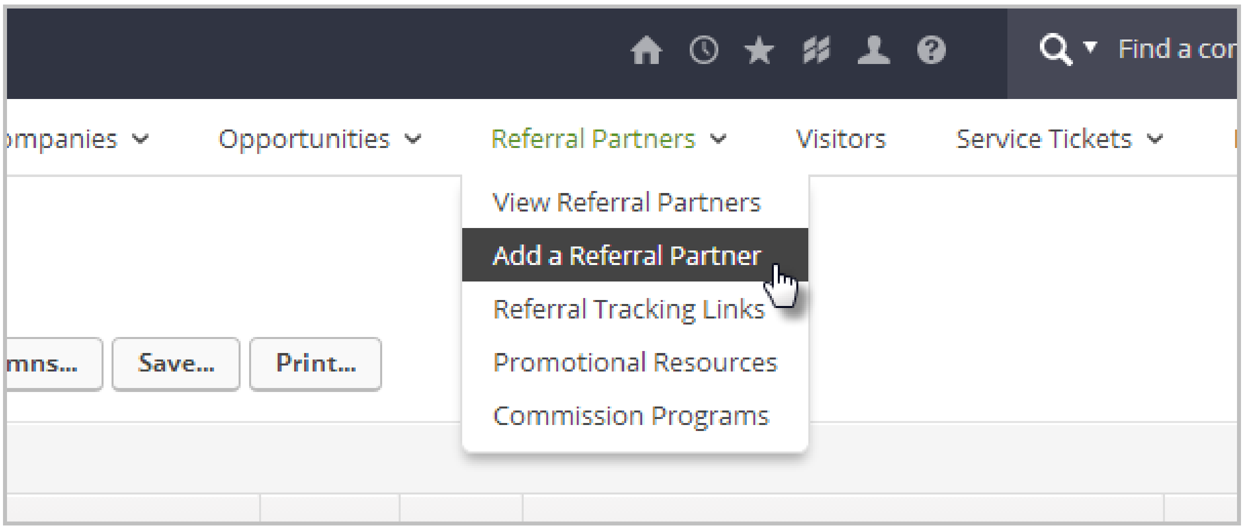
Create A New Referral Partner

Last Modified on 08/02/2018 2:41 pm MST

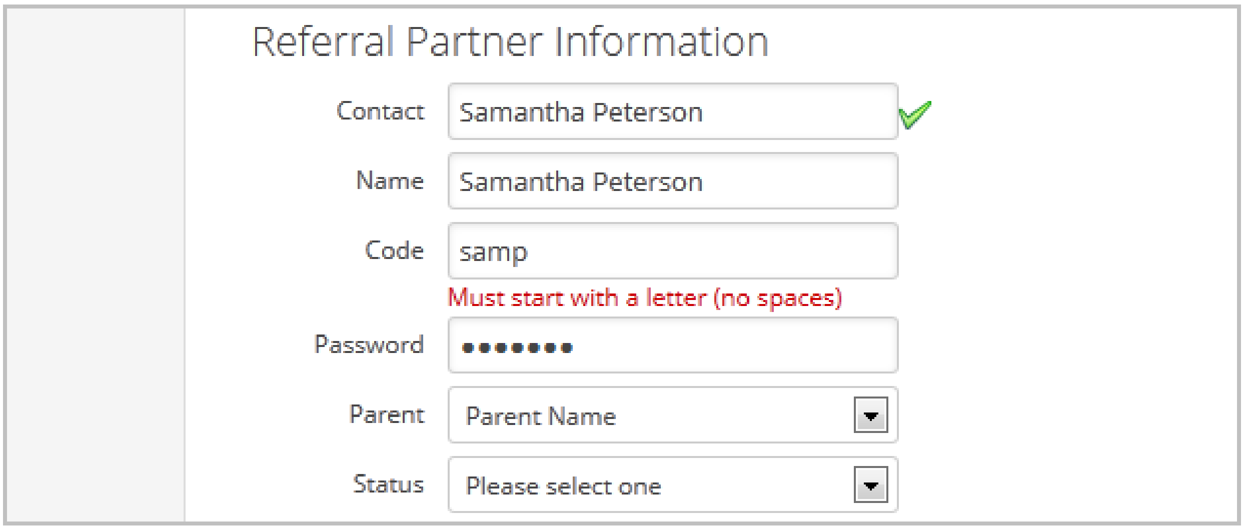
Add a referral partner manually

Follow the directions below to create a new referral partner manually. Make sure a contact record for the partner already exists before continuing.

1. Go to **CRM** > **Referral Partners** in the main navigation menu.
2. Select **Add a Referral Partner** from the Referral Partners menu.



3. Enter the Referral Partner Information.

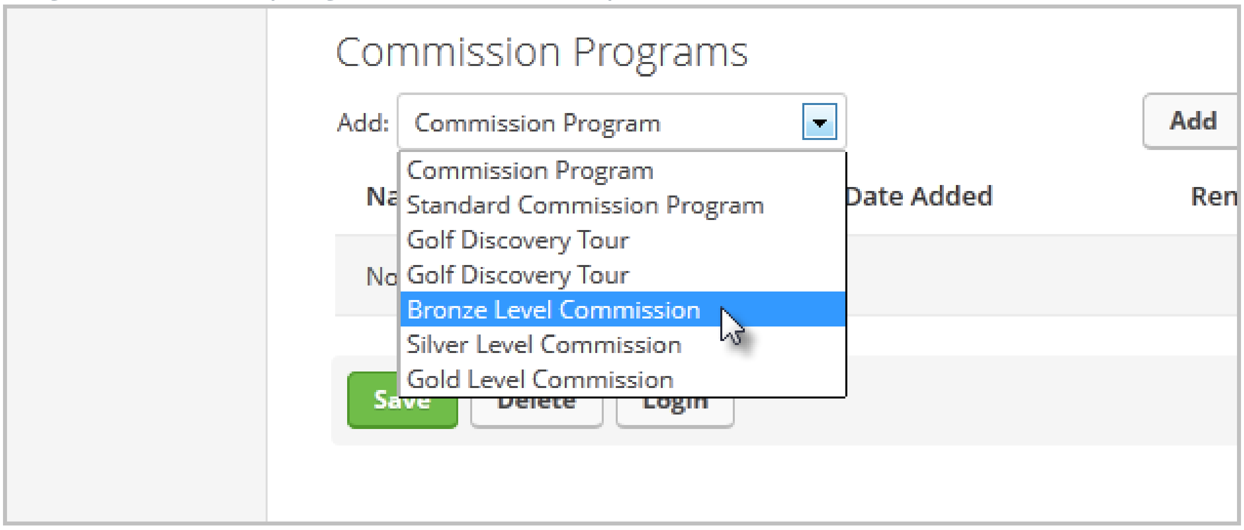


- **Contact** - This is a search box. Enter a contact's name and the search will locate matching contact records. Click on a name to select the person.
- **Name**: This is the name of the referral partner. It can be the same as the contact's name, or it can be an entity that the contact is associated with (e.g. a professional organization.)
- **Code**: This is the referral partner's tracking code. It is included in all of the referral tracking links and resources. It is also the referral partner's username when logging into the Referral Partner Center. The code must start with a letter. You can merge the code into follow-up emails.
- **Password**: This is the password the partner will use to log into the Referral Partner Center. You can merge this password into follow-up emails.
- (Optional) **Parent** - Enter a contact's name and click Search to locate the parent partner. This only applies if you have a multi-level referral program.
- **Status** - Select *active* so this partner will be eligible for commissions. You can inactivate partners who are no longer involved in your partner program.
- **Notify on Lead**: If you set this to *yes*, the partner will receive an automated email

notification when one of their referrals fills out a web form or landing page.
  - **Notify on Sale**: If you set this to *yes*, the partner will receive an automated email notification when a referral purchases something from you.
  - **Track Leads for**: Limit the number of days the referral partner's tracking cookie is active after a link click. Leave this field blank if you do not want to limit the credit window.
  - (Optional) **Cart Skin**: By default, the partner's referrals will see the same shopping cart theme that all of your other buyers see. This might be appropriate if the partner is an "industry influencer" and desires their referrals to have an experience consistent with their own content.

4. Click on the **Save** button to create the referral partner record.

5. Go to the *Commission Programs* section to assign the partner to a commission program. Select a program from the drop-down and click on the **Add** button.



6. (Optional) Repeat this process to assign the partner to additional programs.

   Individual Commission Structures
   If this referral partner has a unique agreement with you that includes an individualized commissions structure, go to the commissions tab in the bottom row of tabs to enter their commissions, instead of entering the commission program(s) as described above. This process is the same one you used to create Commission Programs.

Import Referral Partners

Please contact Sales at 1.866.800.0004 ext. 1 for details on "Advanced Import Services."

Batch assign a list of contacts to a referral partner program

1. Go to **CRM** > **Settings** in the main navigation menu.
2. Click on **Action Sets**
3. Click the **Add an Action Set** button
4. Name the action set something you can easily remember
5. In the *Add New Actions* drop-down select **Create Referral Partner**
6. Choose the program name to add the list to.
7. Configure any other Referral Partner settings you would like (Notifications, Credit Window, etc.)
8. Click **Save.**
9. Find the list of people that you would like to add to the program by searching for them.
10. Once you have your list of people, click the Actions drop-down and select **Apply Action Set.**
11. From the Actions drop-down, click on the **Run Other Action Set** option.
12. Select the action set from the drop-down.
13. Click **Save**.
14. Click **Process Action**

Create Referral Partner automatically in a Campaign

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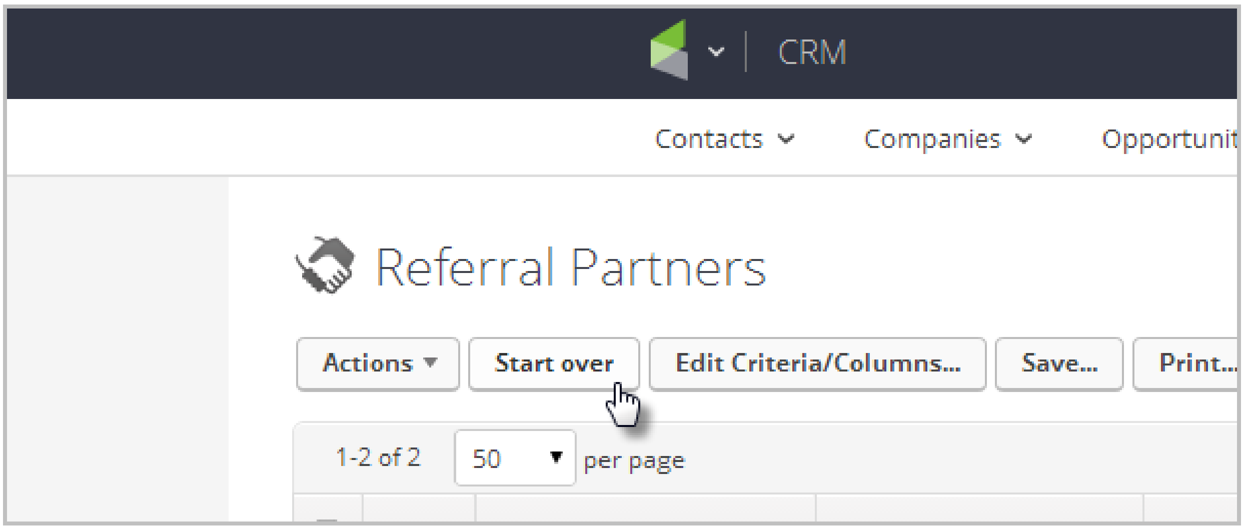
Search For Referral Partners

Last Modified on 08/02/2018 2:41 pm MST

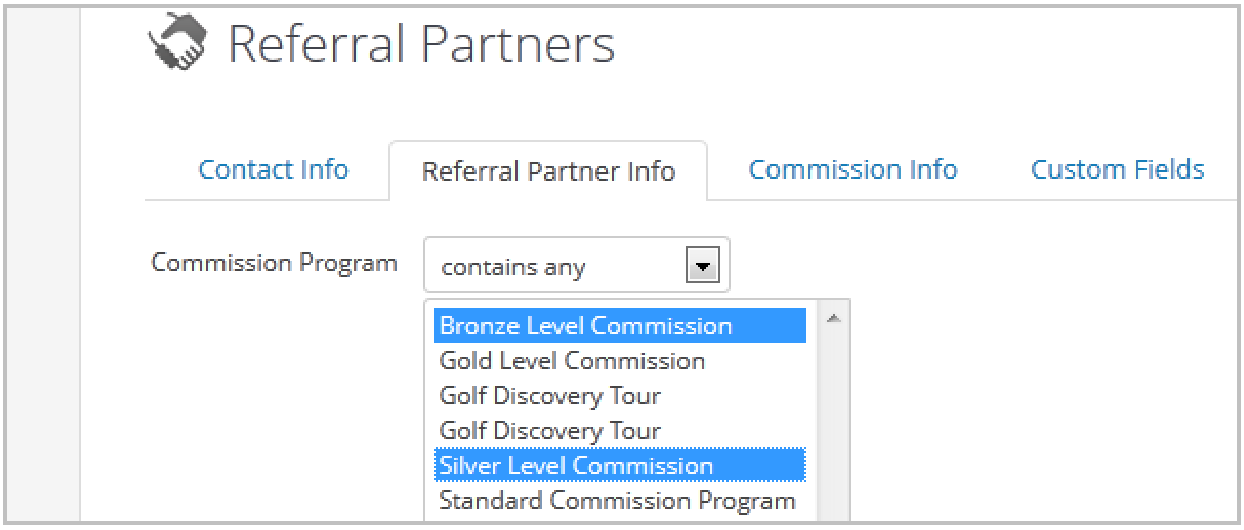
1. Go to **CRM** > **Referral Partners** in the main navigation menu.

2. If necessary, click on the **Start Over** button to clear any previous search criteria.



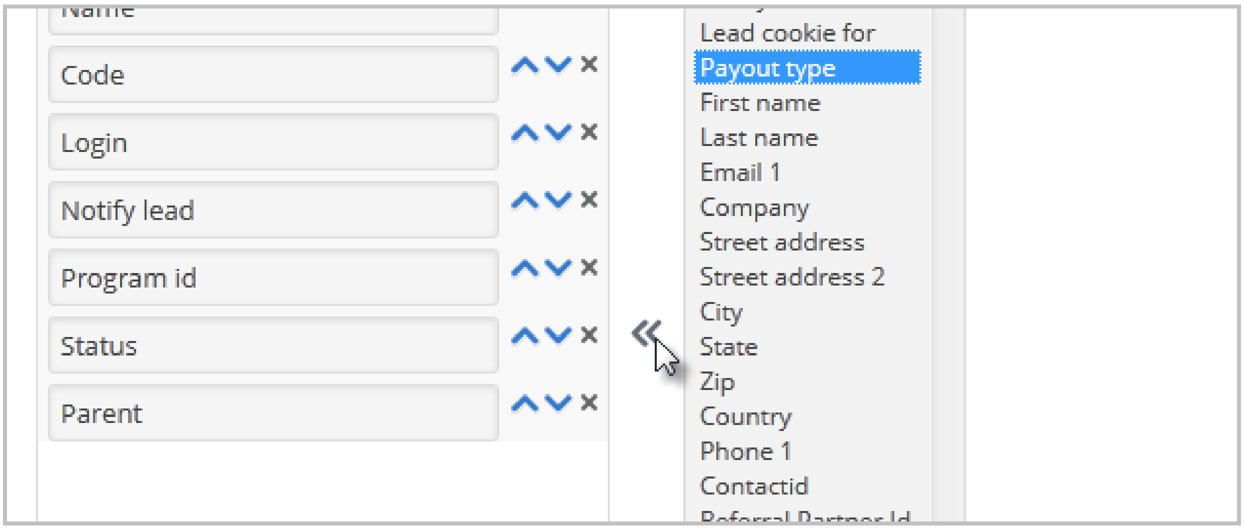
3. Enter the Search Criteria from one or more of the tabs to produce a specific referral

partner list (e.g. referral partners that are in the *Bronze* and *Silver* commission programs.)

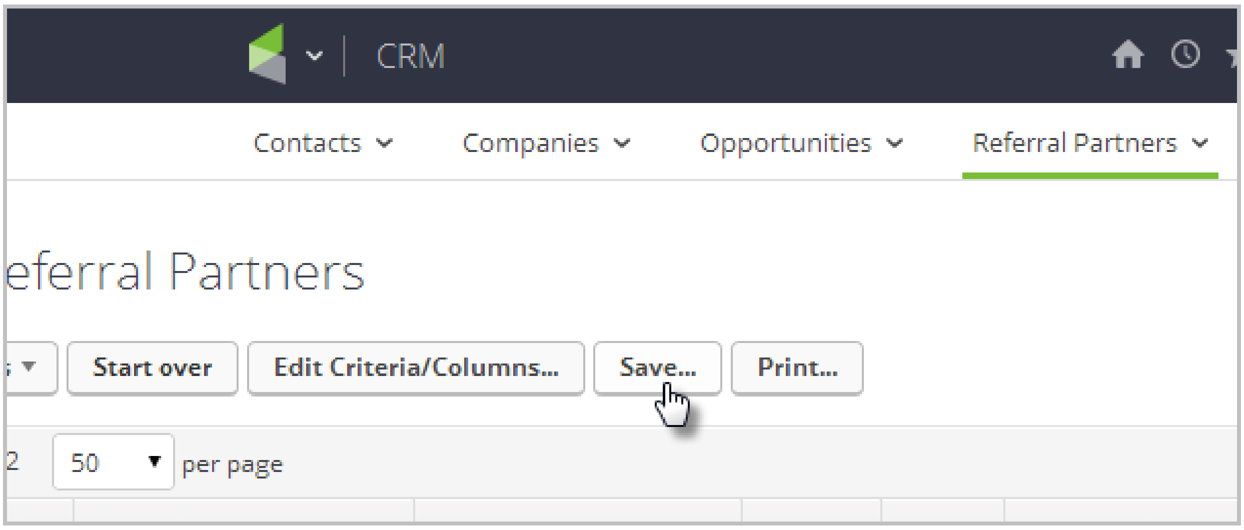


4. Click on the **Search** button to continue.

5. (Optional) Click on the **Edit Criteria/Columns** button to adjust the search criteria or add/remove columns from the search results, then click **OK** to apply the changes. In the example image below, the column, "Payout type" has been added to the search results.

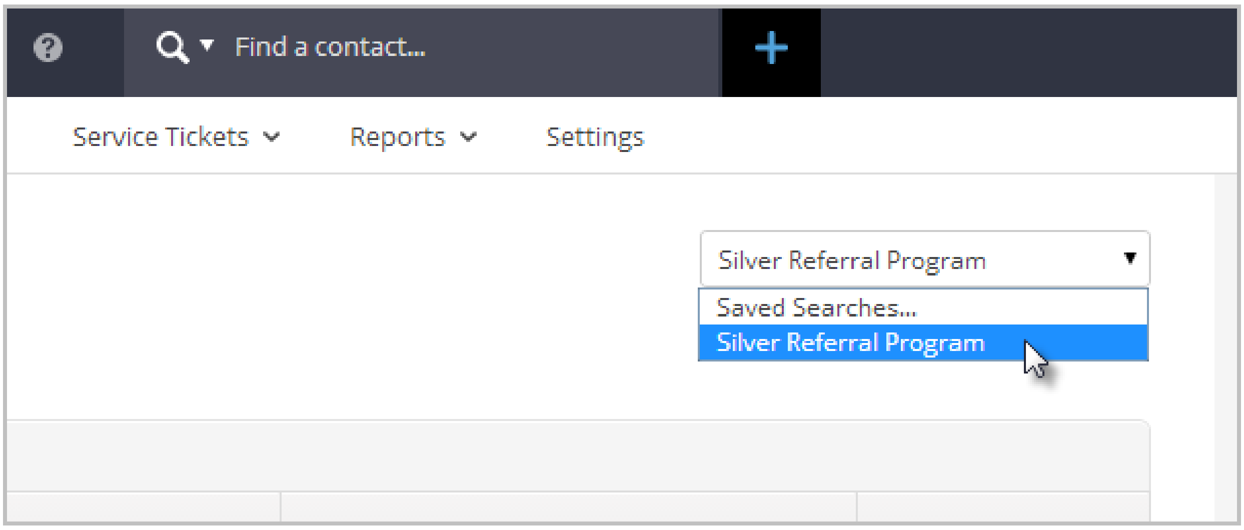


6. Click on the **Save** button to name and save the dynamic list for quick access in the future. The referral partners in the list will update automatically. You are saving the criteria, not a specific list.

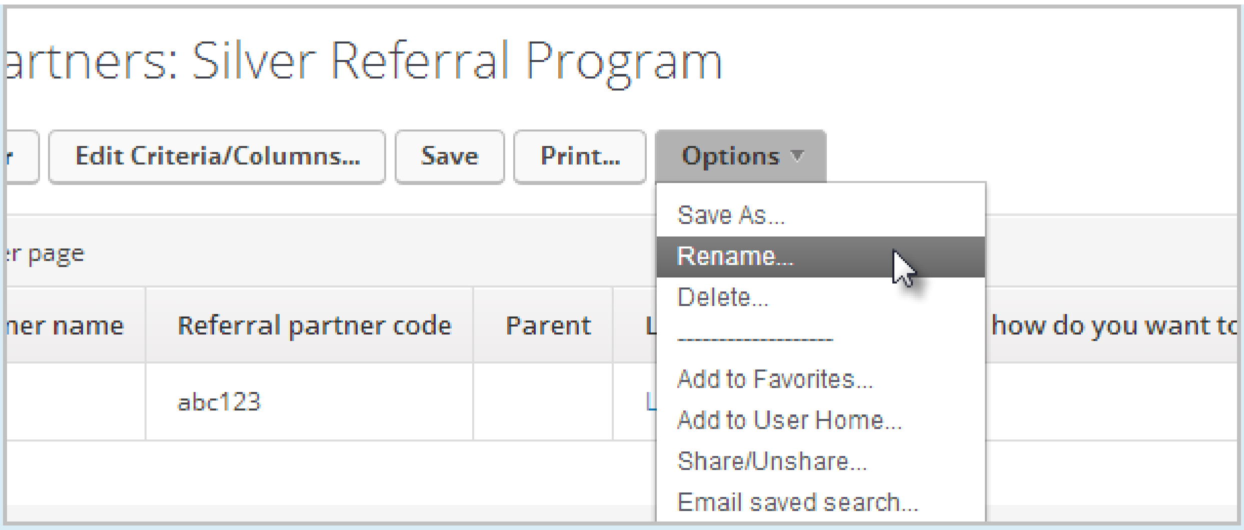


- **Name**: Enter a short, descriptive name for the search. This name will display in custom drop-down menus.
- **Share the Search**: Click on the name(s) of the users who need to see this search. Click on **Everyone** to share the search with all users. Hold down the CTRL key on your keyboard to select more than one user from the list.
- (Optional) Mark the *Add this search to the User Home* checkbox if you want to add a saved search widget to your dashboard. The saved search widget will display the first 20 referral partners in the list, and a link to view the entire list of partners.

7. Click on the **Save** button. The saved search is now available as a drop-down whenever you go to **CRM** > **Referral Partners**.



Pro Tip!
Once you save a search, you can modify it, add it to your user home, share it, or create an automated email report. Just click the **Options** button.


artners: Silver Referral Program
Edit Criteria/Columns...
Save
Print...
Options
Save As...
Rename...
Delete...
Add to Favorites...
Add to User Home...
Share/Unshare...
Email saved search...
r page
ner name
Referral partner code
Parent
how do you want to
abc123

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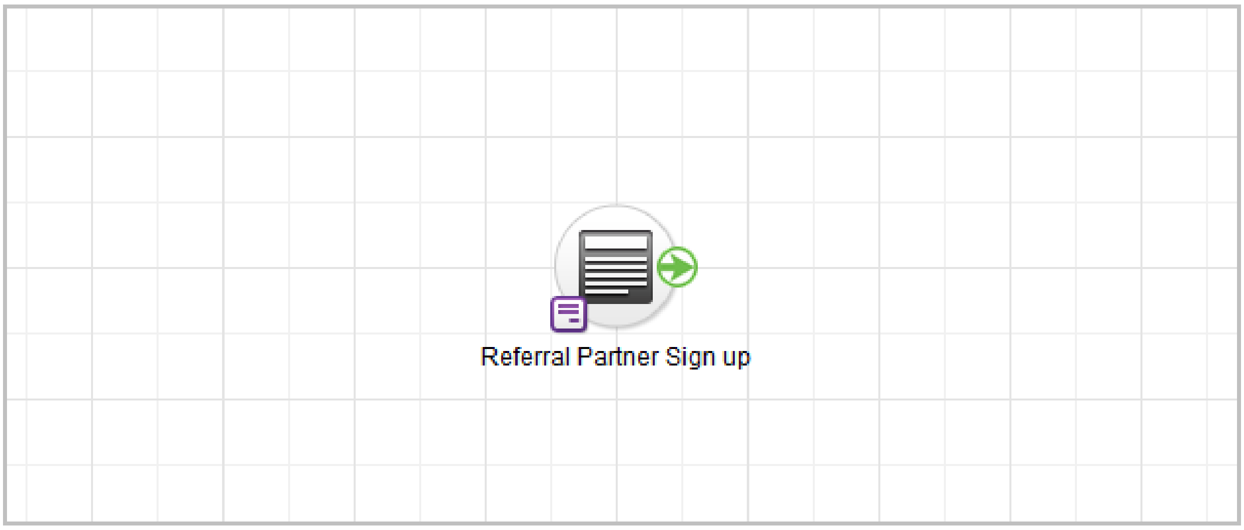
Referral Partner Sign Up Form

Last Modified on 08/02/2018 2:42 pm MST

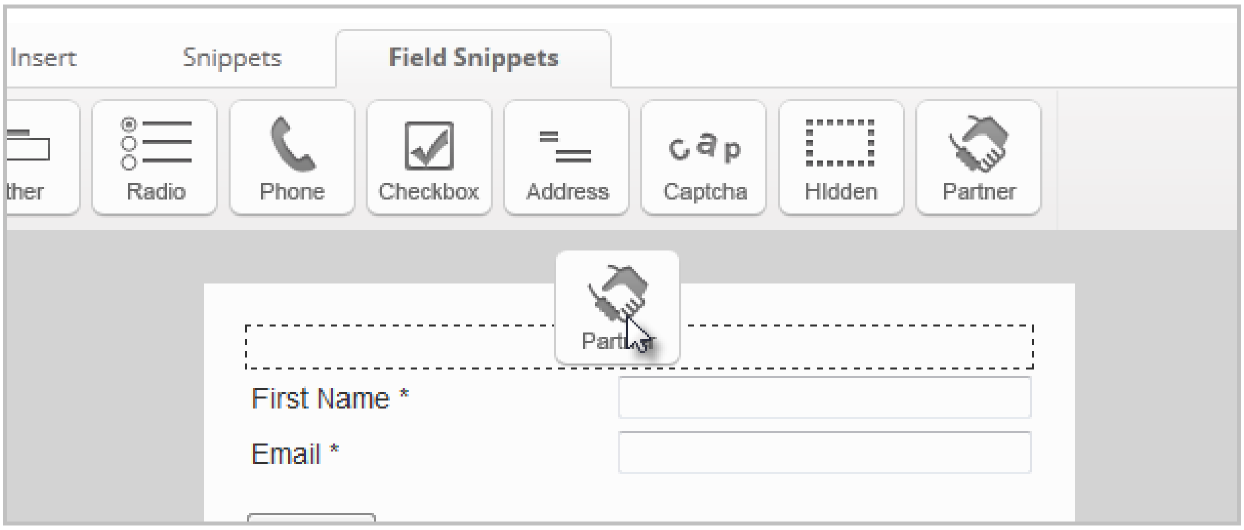
A referral partner sign-up form allows people the ability to sign-up for your referral partner program. Before creating the sign up form, set up the commission program they will be assigned to when they fill-out the form. When someone fills out the referral partner sign up form, several things automatically occur:

- A contact record is created (if none already exist.)
- A referral partner record is created.
- The referral partner is assigned to a partner program.

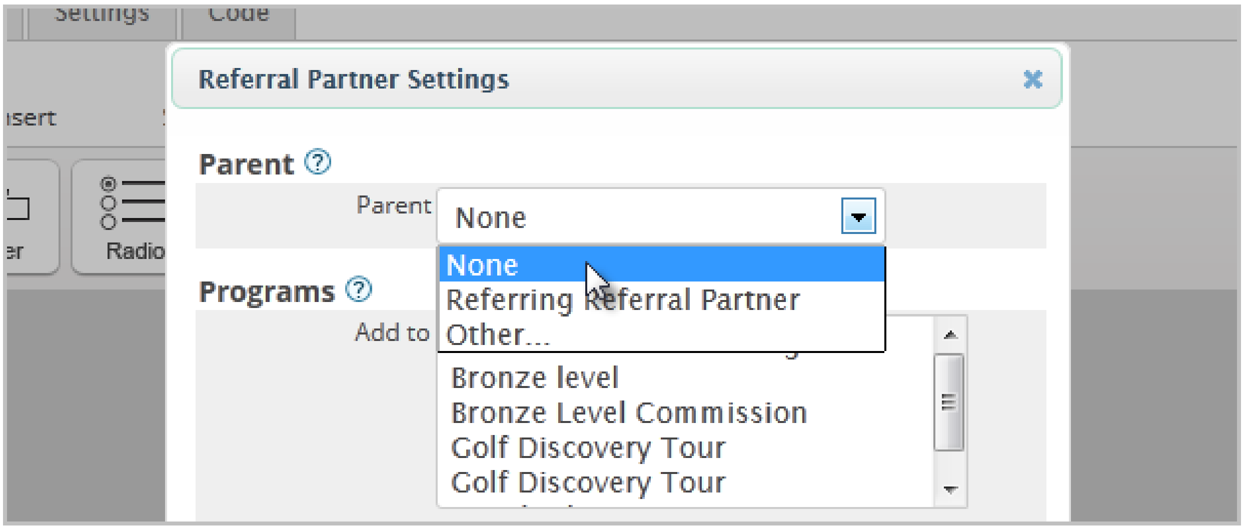
1. Go to **Marketing** > **Campaign Builder** to add or edit a web form goal in a campaign.



2. Go to the **Field Snippets** tab and drag over the Partner Snippet and drop it into the desired location on the form. This snippet adds username and password fields, which set up the login for the Referral Partner Center.

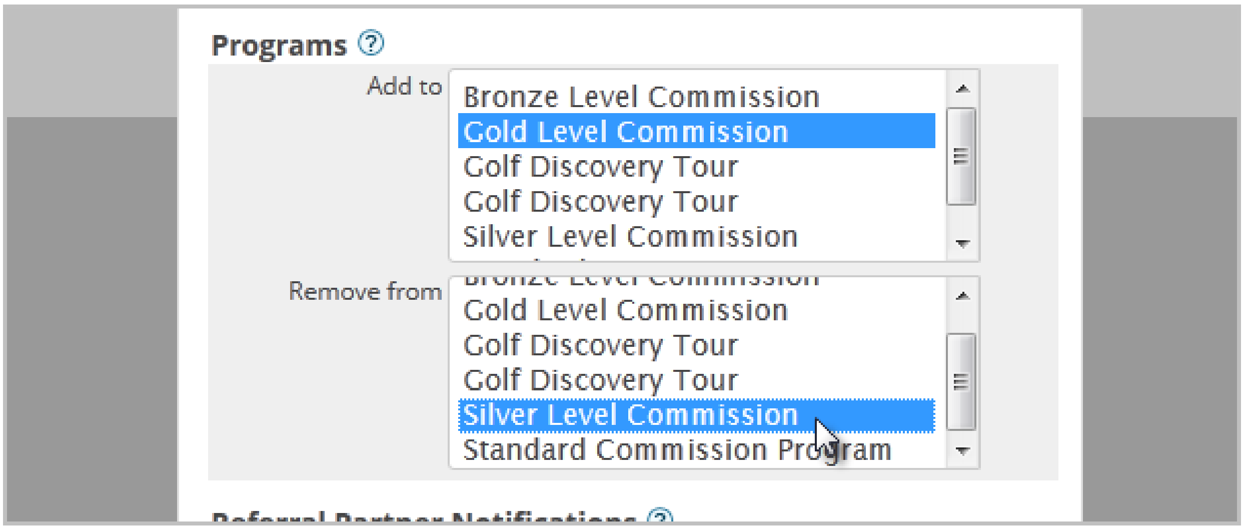


3. Configure the Referral Partner options:
   - **Parent**: (Optional) The parent is the partner who referred the person filling out the form. This only applies if you have two or more levels in your referral program. The parent partner earns commission when the people they recruited sell your products.



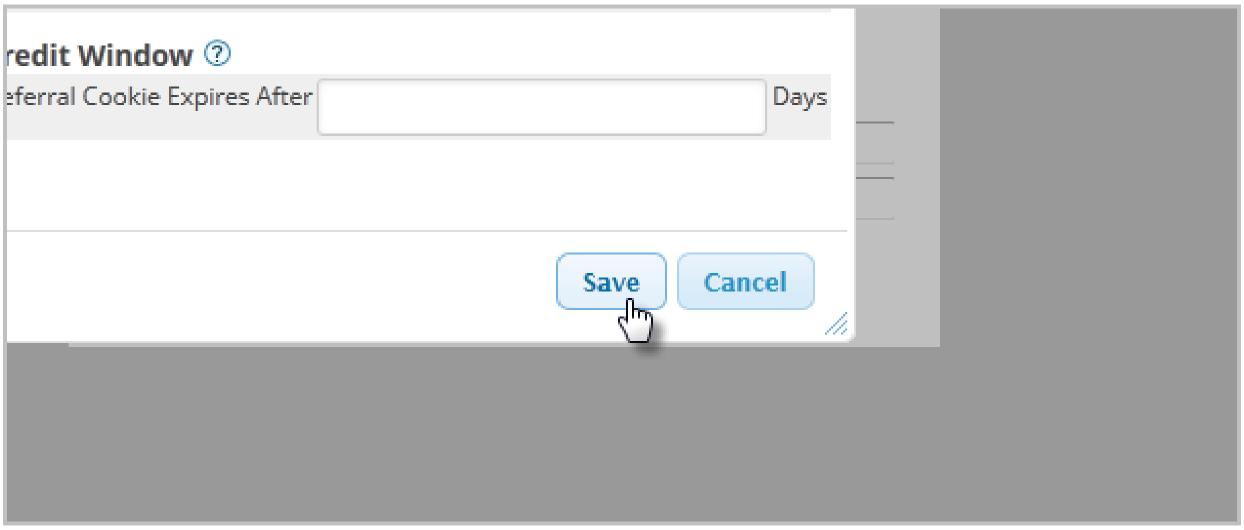
- **None**: Choose *none* if you do not have two or more levels in your referral program. This is the most typical setting.
- **Referring Referral Partner**: Choose this if you want Infusionsoft to automatically assign a parent partner based on referral link tracking. You can also assign a backup referral partner. The backup will be the parent partner if the new referral partner did not click on any type of referral tracking link before signing up.
- **Other**: Choose other if you want one parent partner assigned to everyone filling out this web form. Use this option when you create a co-branded sign-up page to recruit referral partners through a specific strategic or joint venture partner.

- **Programs**: Select the program changes that need to happen when this form is filled out. The program changes will depend on how you are using the form. You can add people to referral partner programs or remove them from programs.

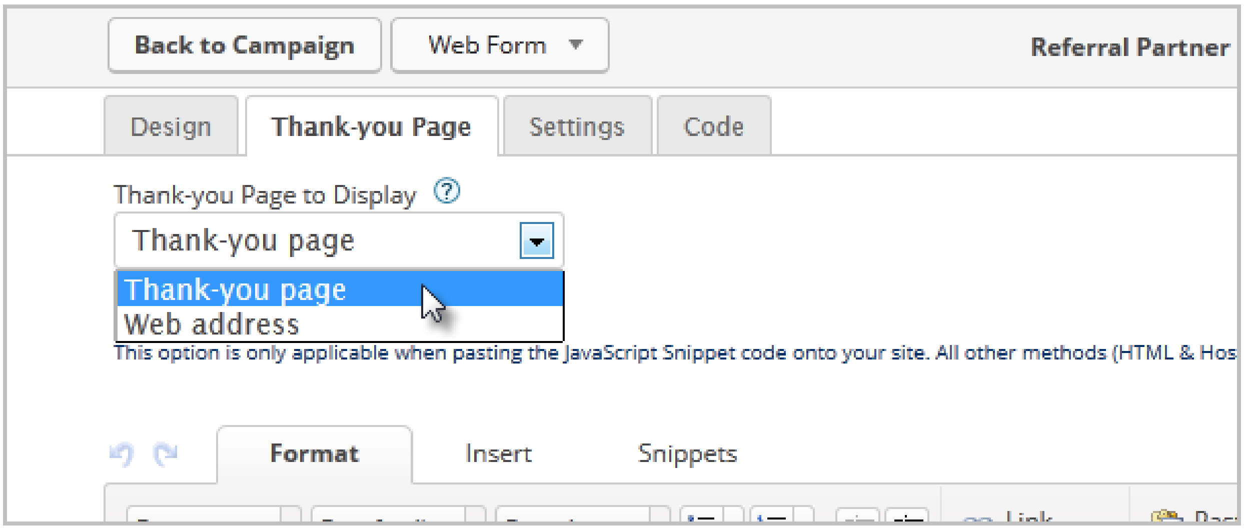


        - **Signing up new referral partners**: Select a program from the "Add to" list.
        - **Graduate partners from one program to another**: Select a program from both lists if your upgrading or downgrading a partner to a separate program.
        - **Put the partners into an additional program**: In some cases, the referral partner will be a member of more than one program.
    - **Referral Partner Notifications:** Do you want partners to receive a notification email when someone they refer signs up or buys something? Select **Yes** or **No** to choose the referral partner notification option, or select **referral partner defined** if you want to let the the partner to decide for themselves when they sign up. Note: If you want to send email notifications to referral partners, make sure the "Skip notifications on orders and web forms?" (CRM > Settings > Referral Partner Settings > Referral Partner Defaults) is set to No.
    - **Credit Window**: Limit the number of days the referral partner's tracking cookie is active after a link click. Leave this field blank if you do not want to limit the credit window. Limit the credit window to inspire competition and urgency among your partners.

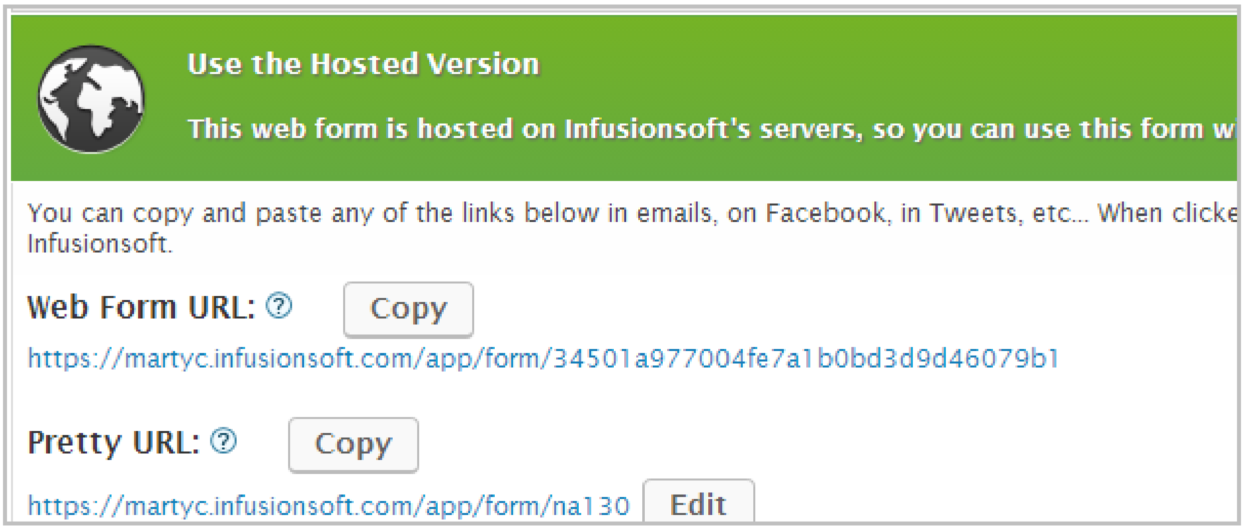
4. Click the **Save** button when you are finished configuring the sign up form.



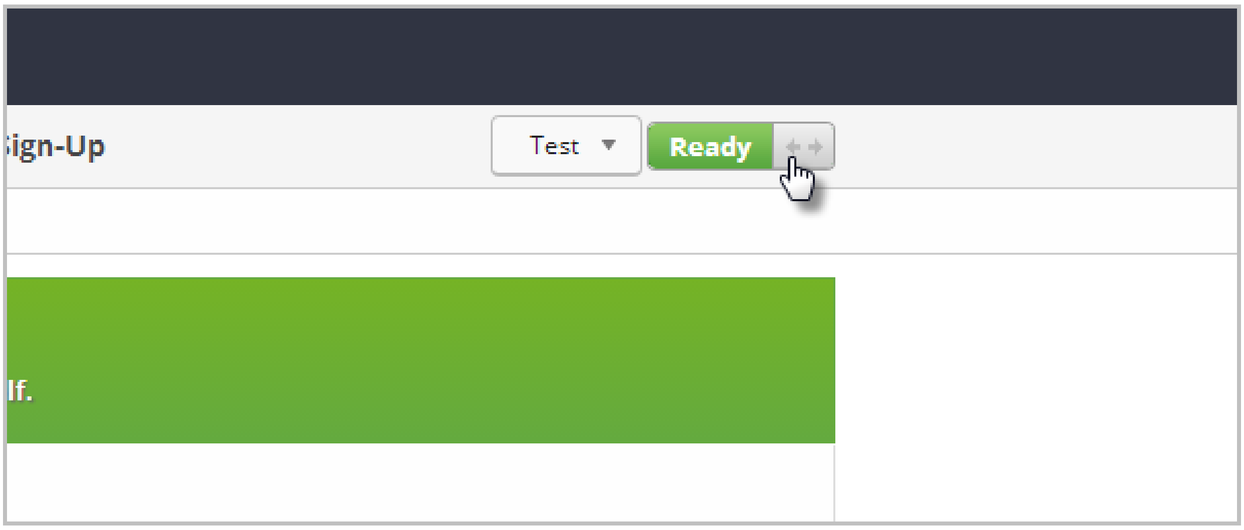
5. Go to the **Thank-you Page** tab and set up your thank-you page. You can create the page on the fly or choose to send them to one of your own web pages.



6. Go to the **Code** tab and get the web form code or use the hosted version of the web form.

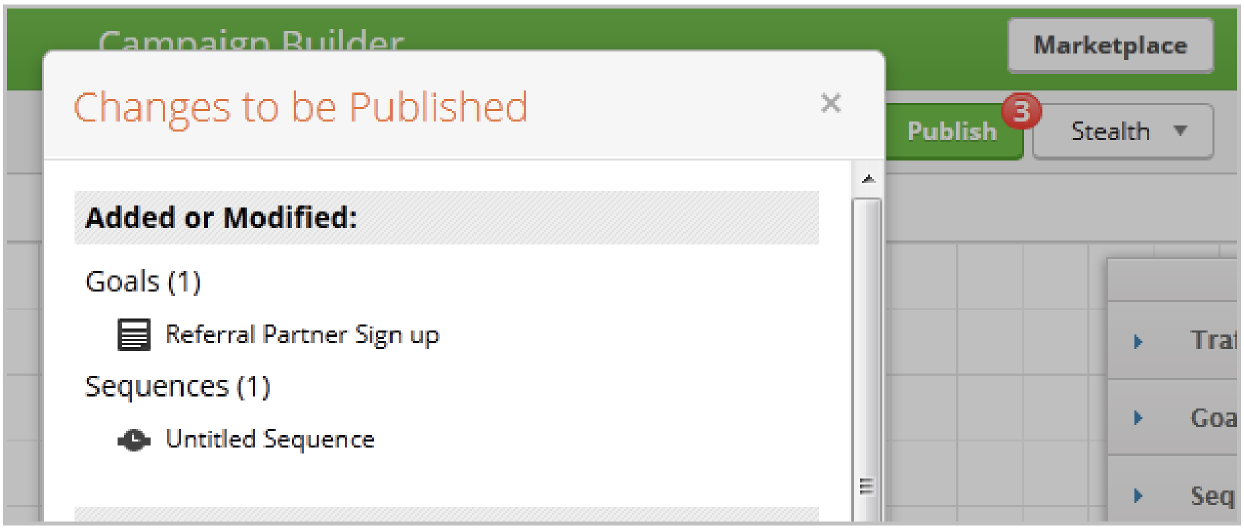


7. Make sure the form is in *Ready* mode and then click **Back to Campaign**.



8. Publish your changes. Make sure this form is connected to a campaign sequence so that

new partners will receive appropriate follow up emails to confirm their registration and tell them how to access the referral partner center.



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Mass Update A List Of Referral Partners

Last Modified on 08/02/2018 2:42 pm MST

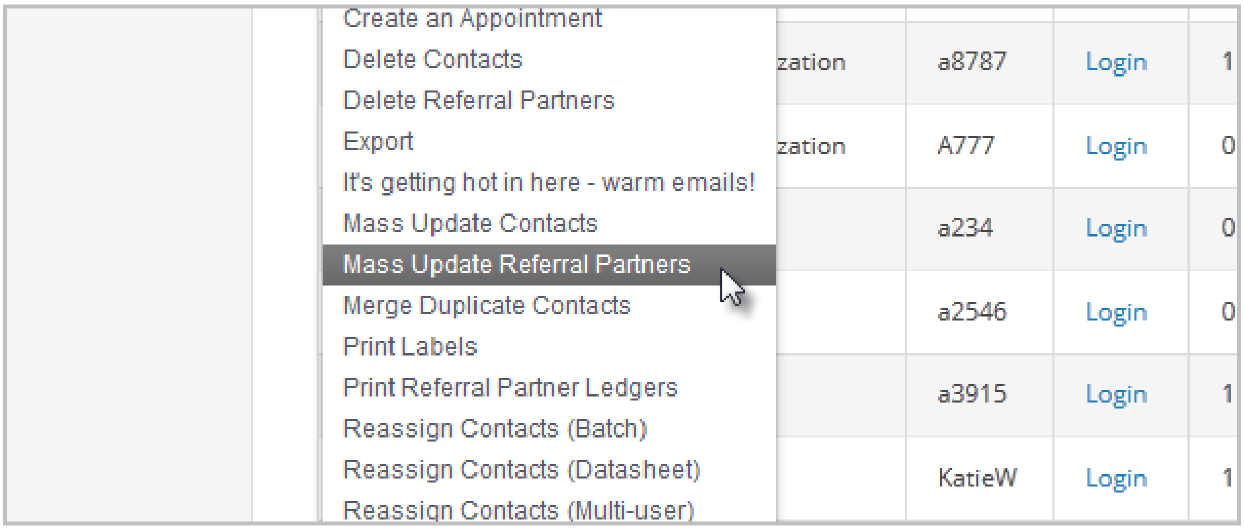
You can mass update the following information for a list of referral partner records:

- Status
- Notify Lead
- Notify Sale
- Lead Cookie for
- Default Skin
- Remove from Programs
- Add to Programs
- Referral Partner Record Custom Fields

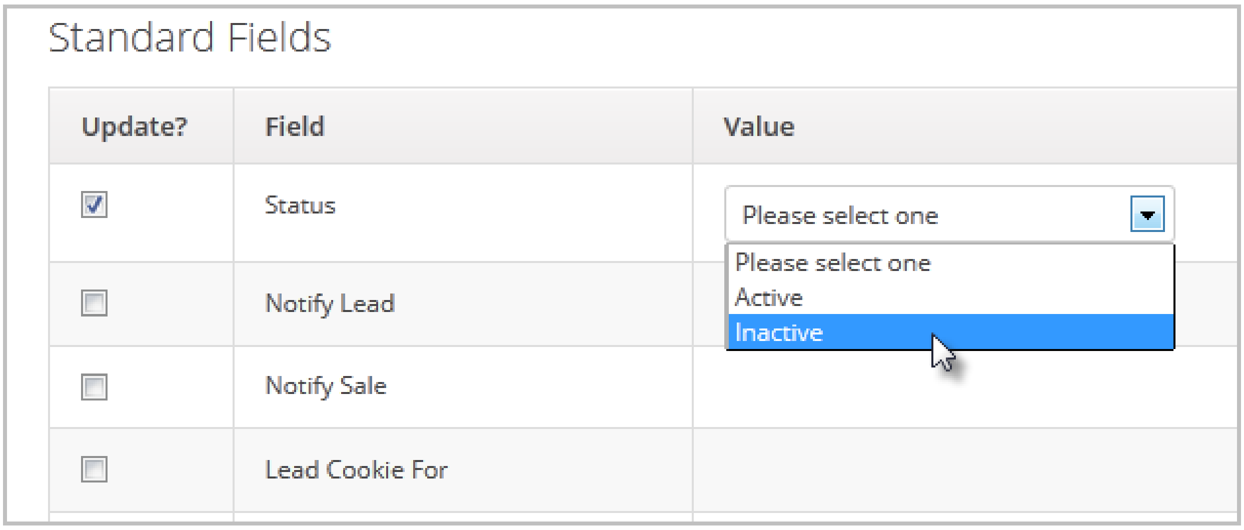
1. Go to **CRM** > **Referral Partners** in the main navigation menu or the referral partner ledger report (**CRM** > **Reports** > **Referral Partner** > **Referral Partner Ledgers**)

2. Navigate to **CRM>Referral Partners** and search for the Referral Partners that need an update.

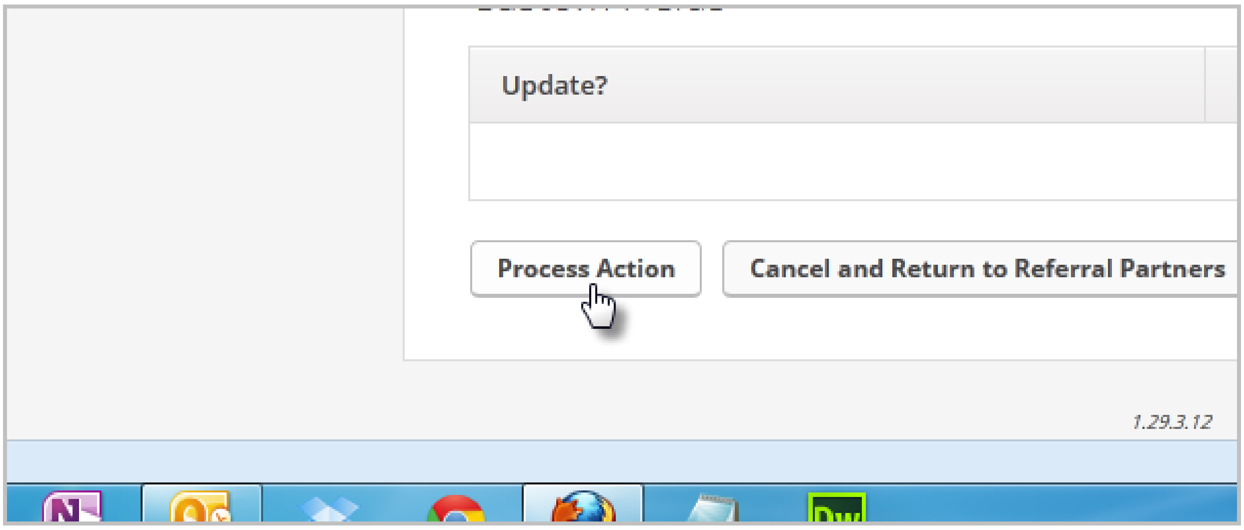
3. Click on the **Actions** drop-down and select **Mass Update Referral Partners** option.



4. Mark the checkbox beside the field(s) you need to update, and enter the new value for that field. The new value will override any existing values for these referral partners.



5. Click on the **Process Action** button to permanently update the referral partner records.



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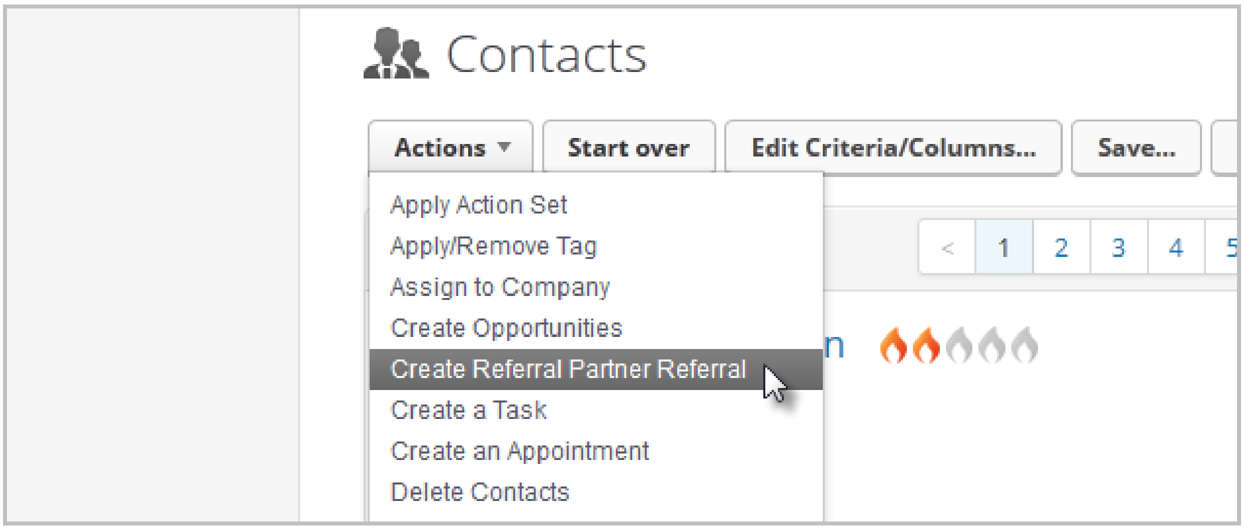
Assign A Referral Partner To Multiple Contacts

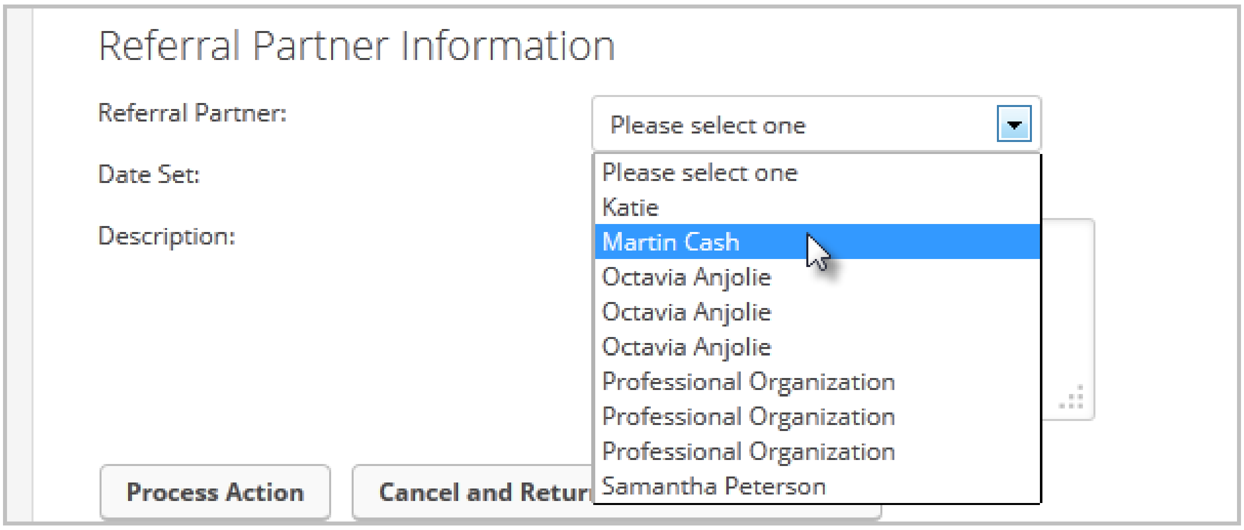
Last Modified on 08/02/2018 2:42 pm MST

You can batch create referral partner referrals for an entire list of people. You may need to do this after importing a list of leads after a partner's event, webinar, or other joint marketing effort.

1. Go to **CRM** > **Contacts** in the main navigation menu.
2. Search for the contacts that you want to assign the referral partner to.
3. Click on the **Actions** drop-down and select the **Create Referral Partner Referral** option from the drop-down.

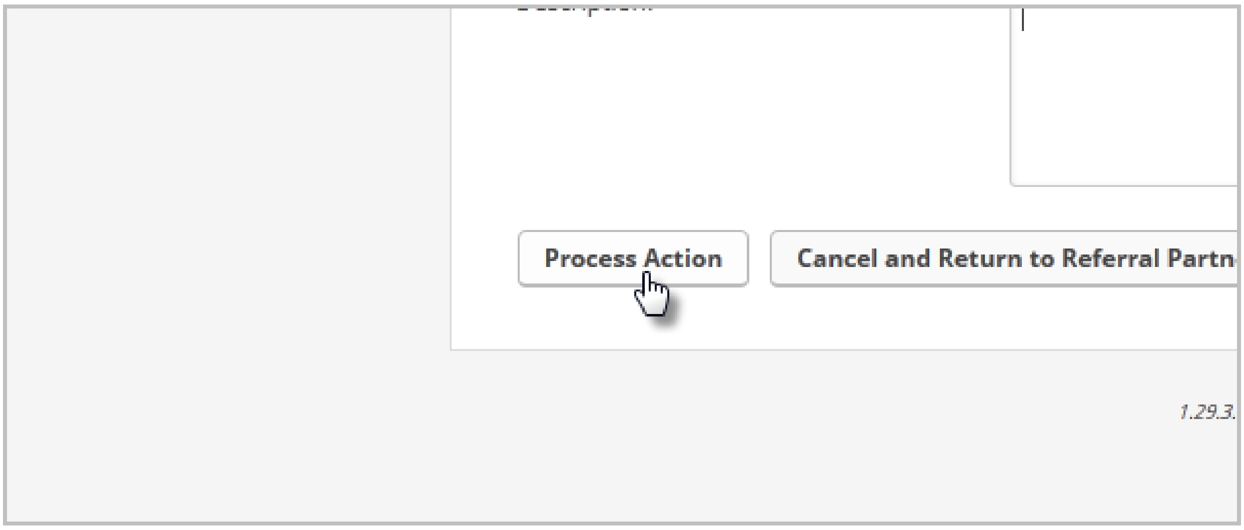


4. Select a Referral Partner from the drop-down.



5. Enter a Date and Description.

6. Click on the **Process Action** button to create the referrals.



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Referral Partner Center Overview

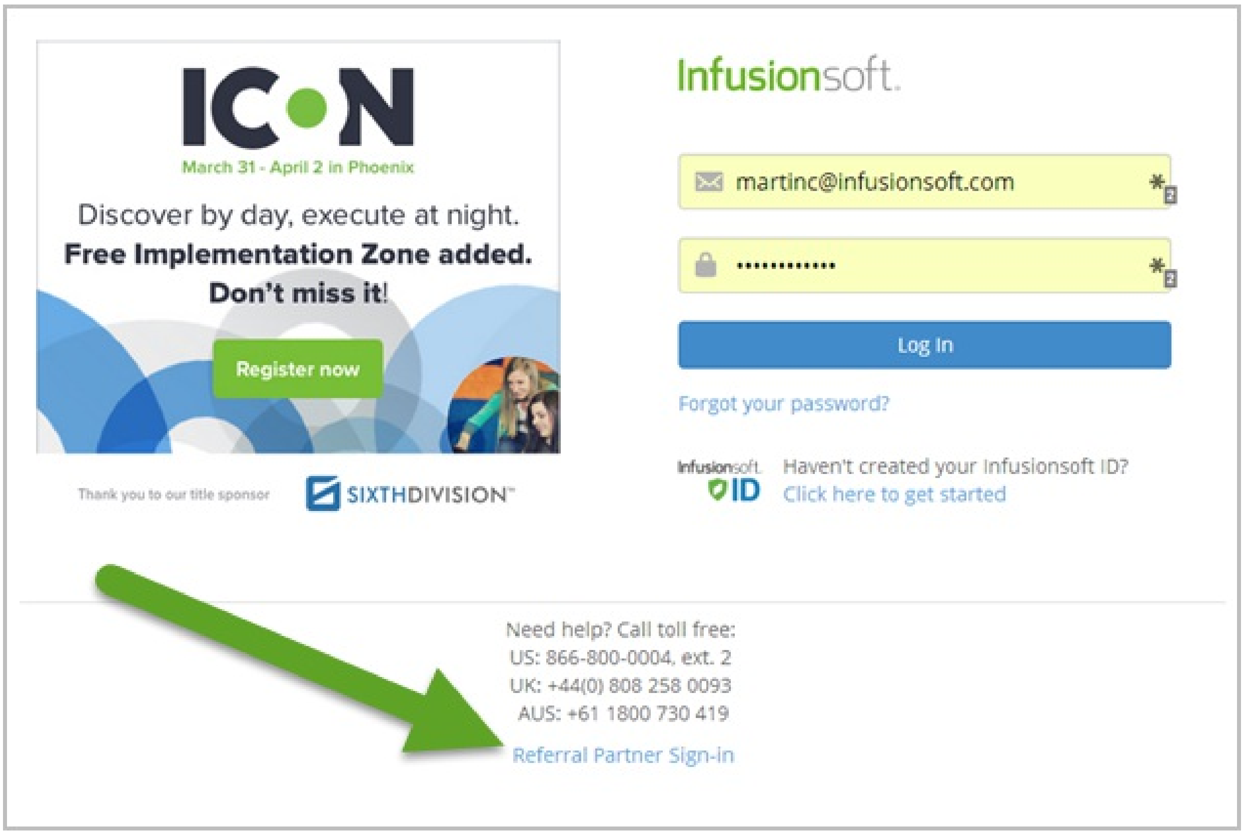
Last Modified on 08/02/2018 3:41 pm MST

The Referral Partner Center is a password-protected portal that your referral partners use to access their referral reports, generate redirect links, and acquire marketing and help materials that you provide for them (banner ads, email copy, etc...) The Referral Partner Center will give your referral partners easy access to the tools and information they need to be successful.

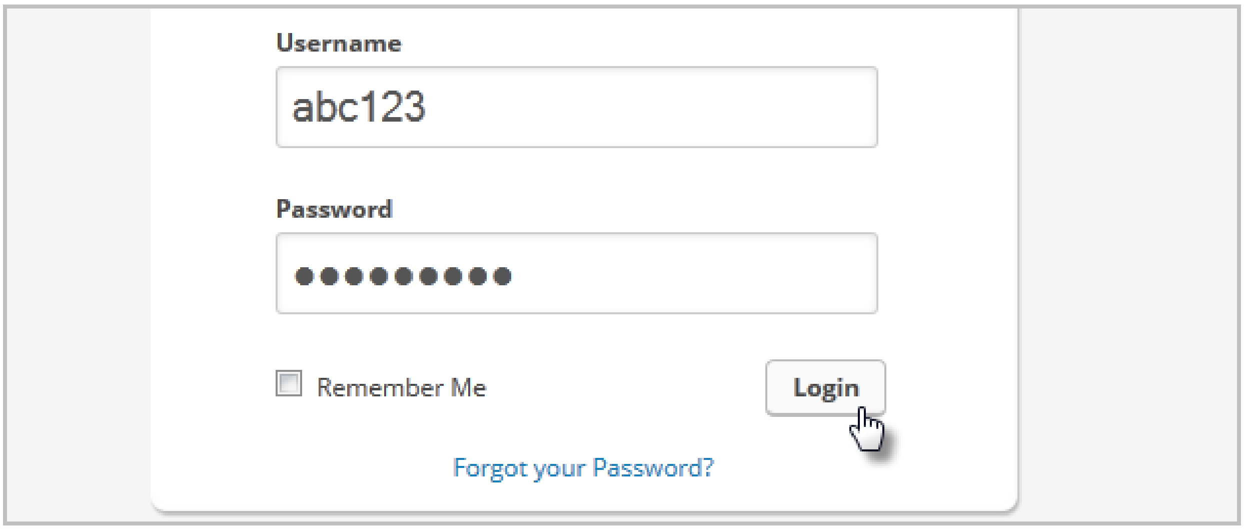
Sign in to the Referral Partner Center

1. Have your referral partner go to your account sign in page (https://youraccount.infusionsoft.com). Below the main sign-in form, you will notice a link that says, **Referral Partner Sign-in**

2. They will then click the **Referral Partner Sign-in** link.

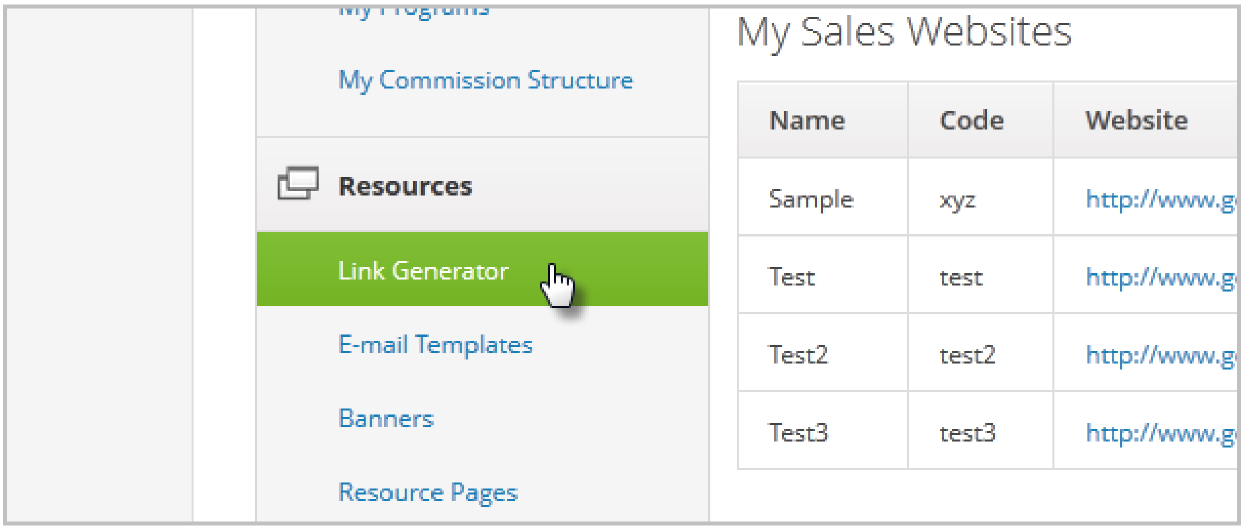


3. The partner will then enter their sign-in credentials. Each referral partner is assigned a unique code. The code is their username. They also need a password, which is usually created by them when they first signed up as a referral partner on your website.



Navigating the Referral Partner Center

Navigation is performed by clicking on the relevant menu option on the left-hand side of the page. There are three menu categories: **Home**, **Resources**, and **Reports**.



- **Home**: The Home section gives partners access to update their contact information and the ability to view information regarding their commission program(s). You can choose to show or hide these individual menu options in **CRM** > **Settings** > **Referral Partner Center**.
  - Welcome: Shows the welcome message that you can edit in **CRM** > **Settings** > **Referral Partner Center**.
  - My Profile: Gives the partner access to view and update their profile information.
  - My Programs: Gives the partner access to a list of the program(s) they are enrolled in and the description you entered when you created the program.
  - My Commission Structure: Gives the partner access to the specific commission fees/percentages for their program(s).

- **Resources**:The Resources section gives partners access to the tools they need to promote your products/services
  - They can generate their redirect links
  - They can access your promotional material: Advertising banners, Email Copy, and Resource Pages.

- **Reports**: The Reports section gives partners access to commission, lead tracking, and sales reports. The **My Ledger** report will be a valuable tool they can use to access their financial earnings.

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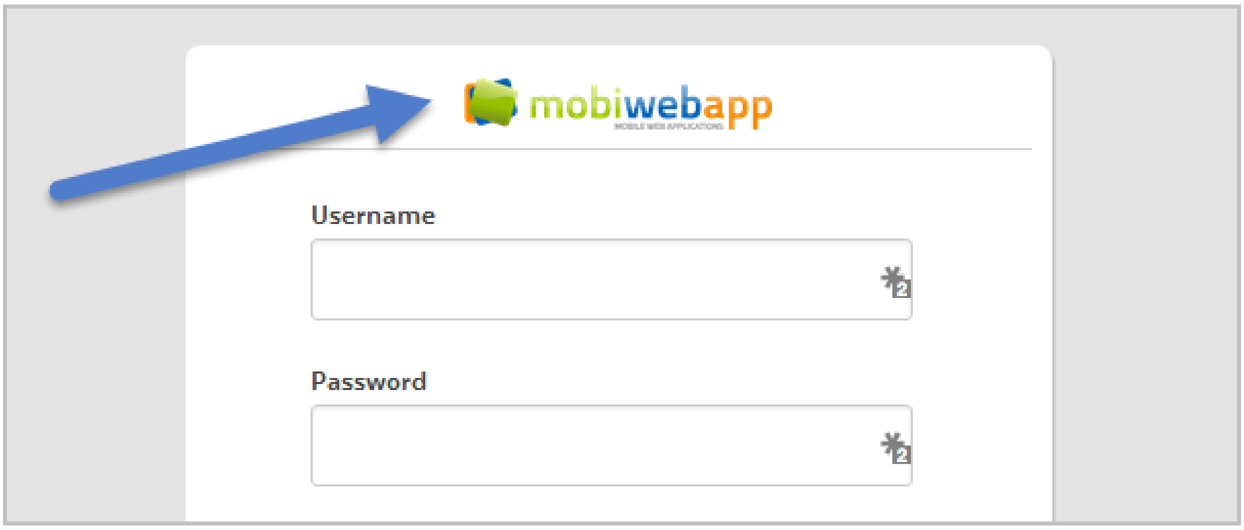
Customize The Referral Partner Center

Last Modified on 08/02/2018 3:42 pm MST

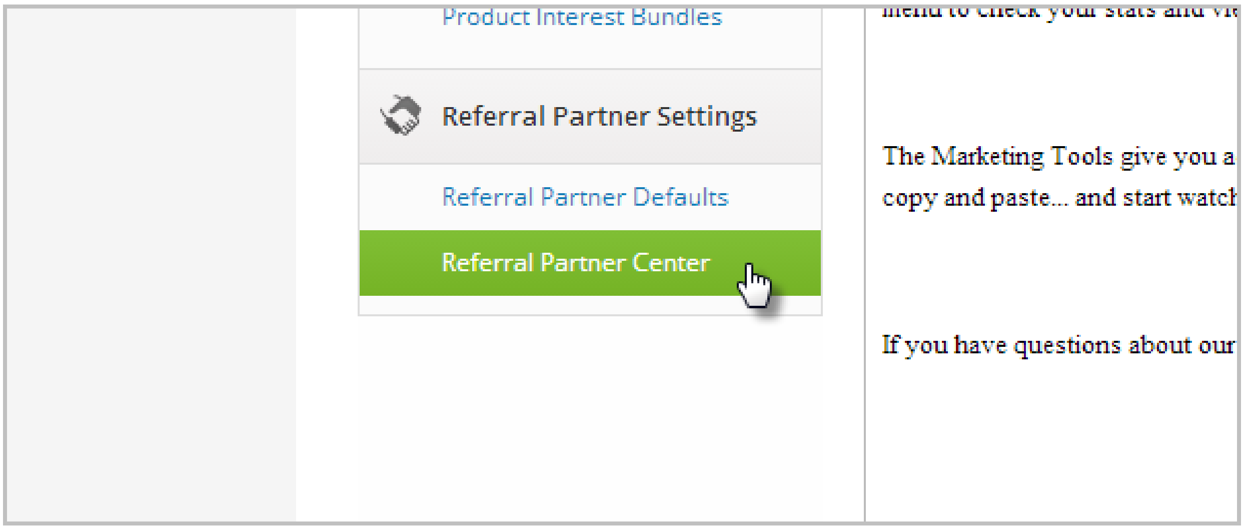
Upload your business logo to the Referral Partner sign-in page

1. Go to **Admin** > **Branding Center**
2. Under the Logo tab, upload a **Sign-in Pages** logo.
3. Now, your partner will see your business logo on the sign-in page.

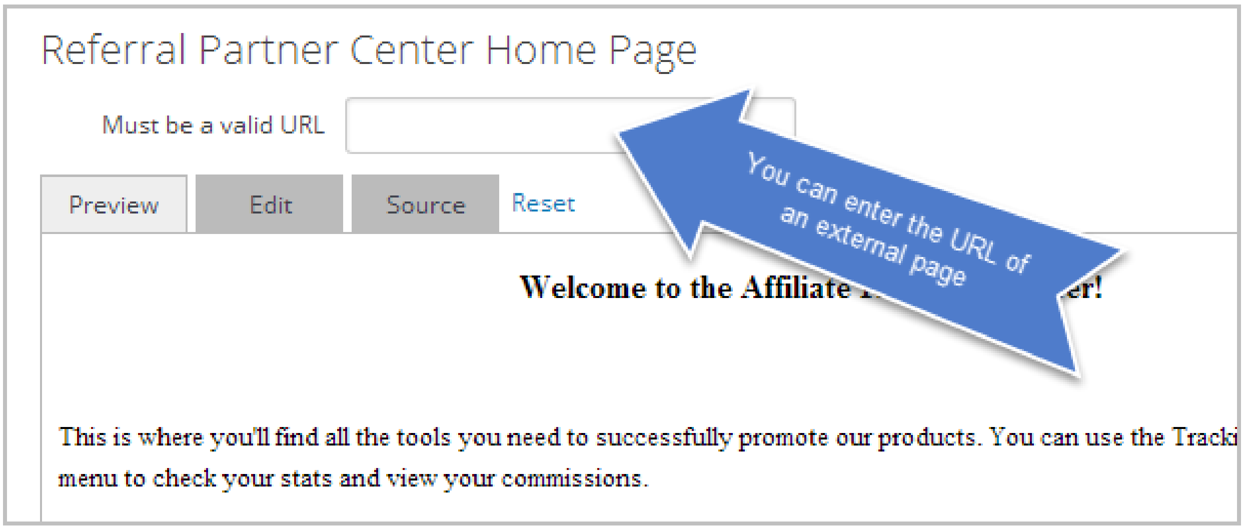


Customize the "Welcome" message that referral partners see when they sign in to the referral partner center

1. Go to **CRM** > **Settings** and click on **Referral Partner Center**.

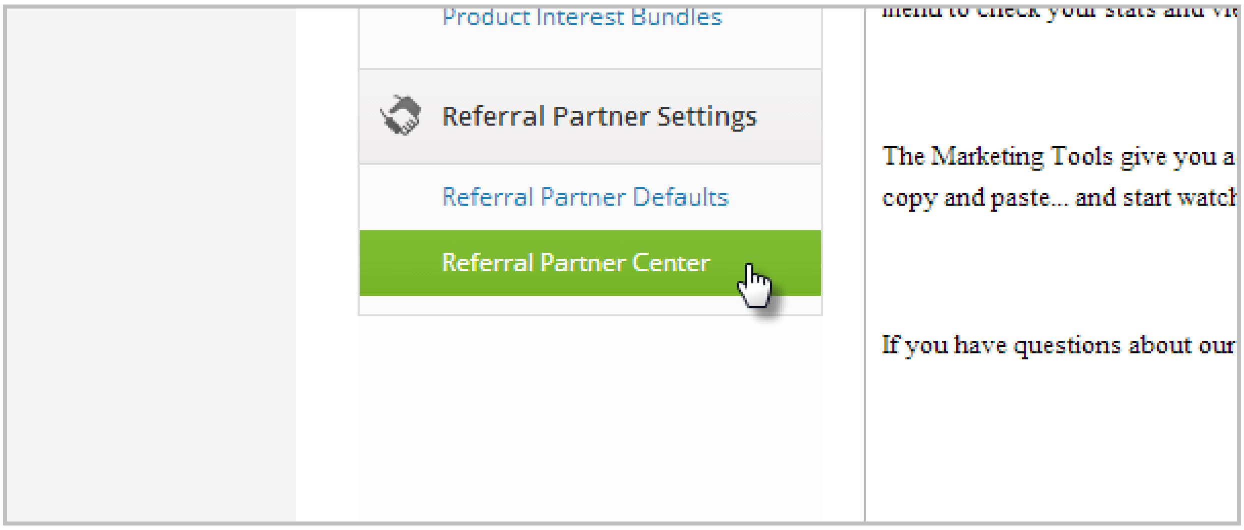


2. You can either create the welcome message using the Infusionsoft editor, or simply enter the URL of an external web page that you would like to embed on the page. Embedding an external web page is a great option of you want someone who is not an Infusionsoft user (e.g. your webmaster) to maintain the page for you.

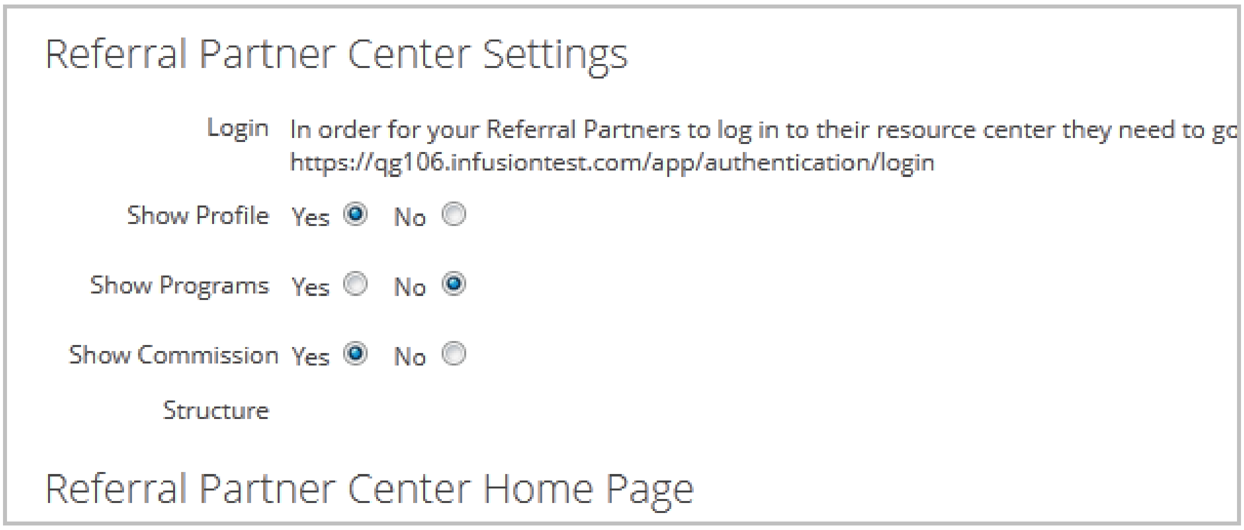


You can enable/disable menu options in the referral partner center

1. Go to **CRM** > **Settings** and click on **Referral Partner Center**.



2. You can choose which information shows up in this menu by enabling or disabling the following options. These are basically On/Off toggles for the menu items.


Referral Partner Center Settings
Login
In order for your Referral Partners to log in to their resource center they need to go
https://qg106.infusiontest.com/app/authentication/login
Show Profile
Yes
No
Show Programs
Yes
No
Show Commission Structure
Yes
No
Referral Partner Center Home Page

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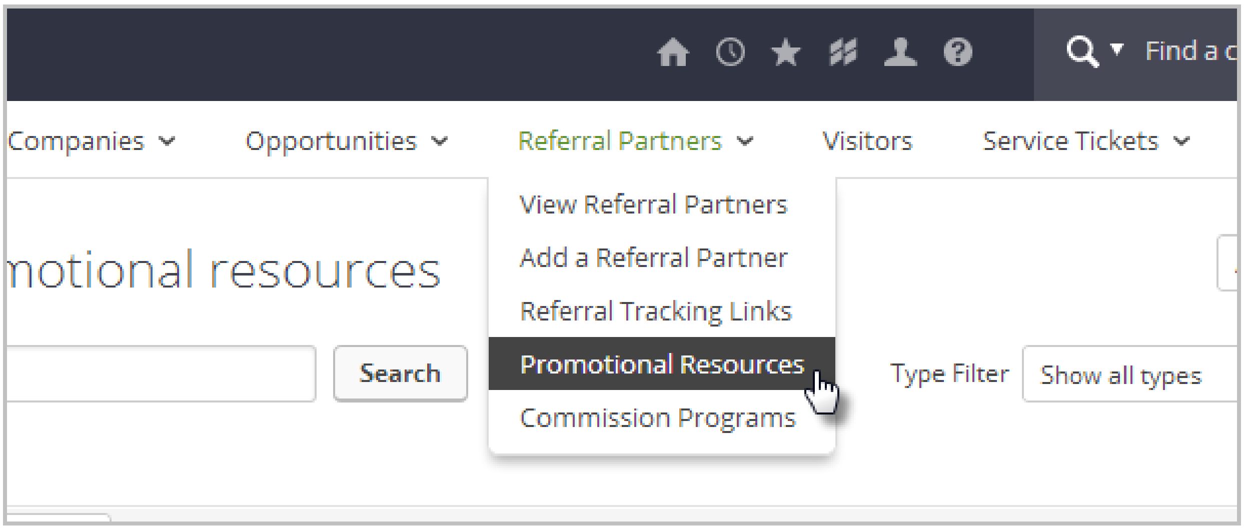
Create And Manage Promotional Banners For Referral Partners

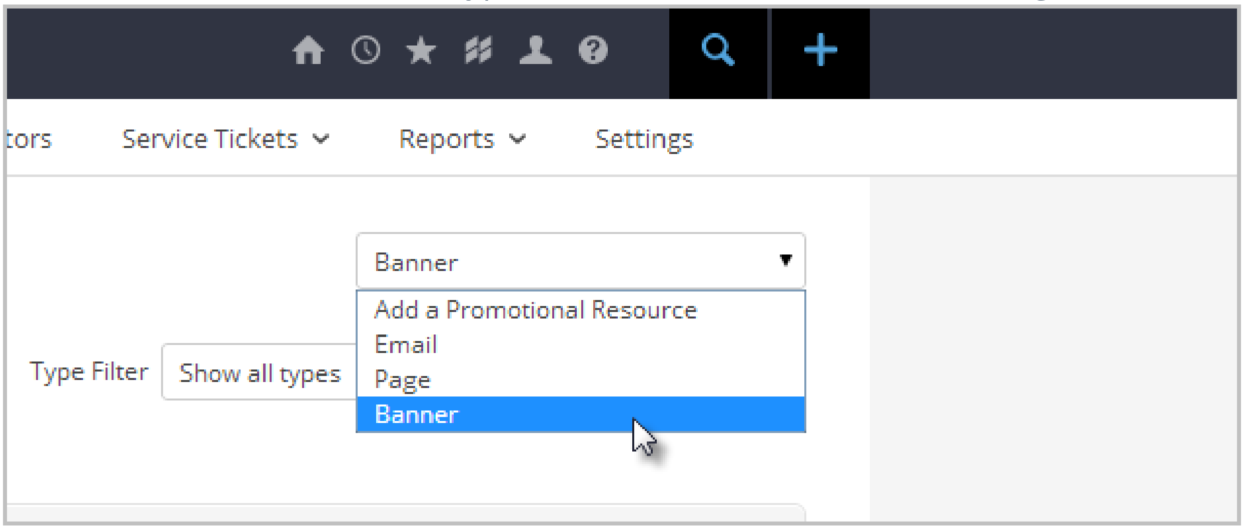
Last Modified on 08/02/2018 3:43 pm MST

Banners are branded graphics that have a referral tracking link included in the embed code. Referral partners who have strong website traffic can embed banner ads onto website, driving traffic for the business. When the referral partner's website visitor clicks on the banner, they will go to the specified web page. Some referral partners may also use banners in email newsletters or other email marketing. Referral partners can copy the banner code from the Referral Partner Center and paste it into an email or website.

1. Before adding a banner, the banner image must first be upload to Infusionsoft or hosted on an external web hosting service. Get the image location url for use later.
2. Go to **CRM > Referral Partners** in the main navigation menu.
3. Select **Promotional Resources** from the Referral Partners menu.



4. Select **Banner** as the resource type or click on the name of an existing banner to edit it.

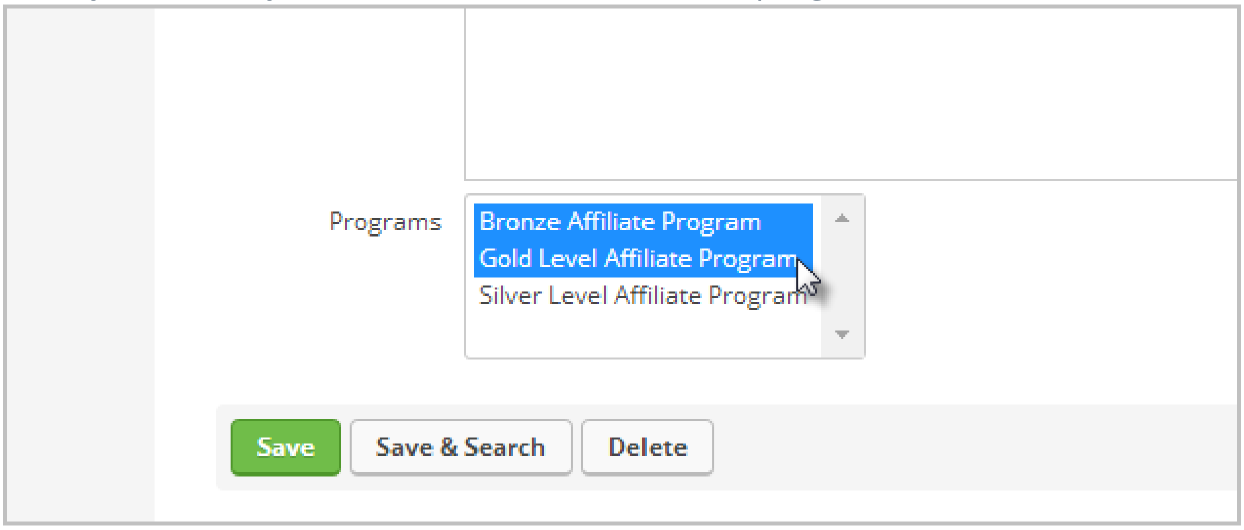


5. Go to the *Information* section
    - **Title**: This is visible to users and referral partners. It should be short, descriptive, and be related to the message in the banner
    - **Notes**: The notes are also visible to users and referral partners. This field can be used to note the banner size, recommend uses, and note any date range limits.
    - **Resource Order**: The order number determines where this banner falls in the banner resource list in the Referral Partner Center. Use it to put the most important banners at the top of the list. The lower the number the higher on the list it will appear

6. Enter the URL for the image that should be displayed as the banner (include the http:// part of the URL).

7. (Optional) Limit access. By default, all of referral partners are able to access this banner. Click on the name of a referral partner program to limit access so that only the referral partners in the selected program can view and use the banner. Hold down the

Ctrl key on the keyboard to select more than one program.



8. Click the **Save** button. This will automatically update the Referral Partner Center so that referral partners can start using this resource.

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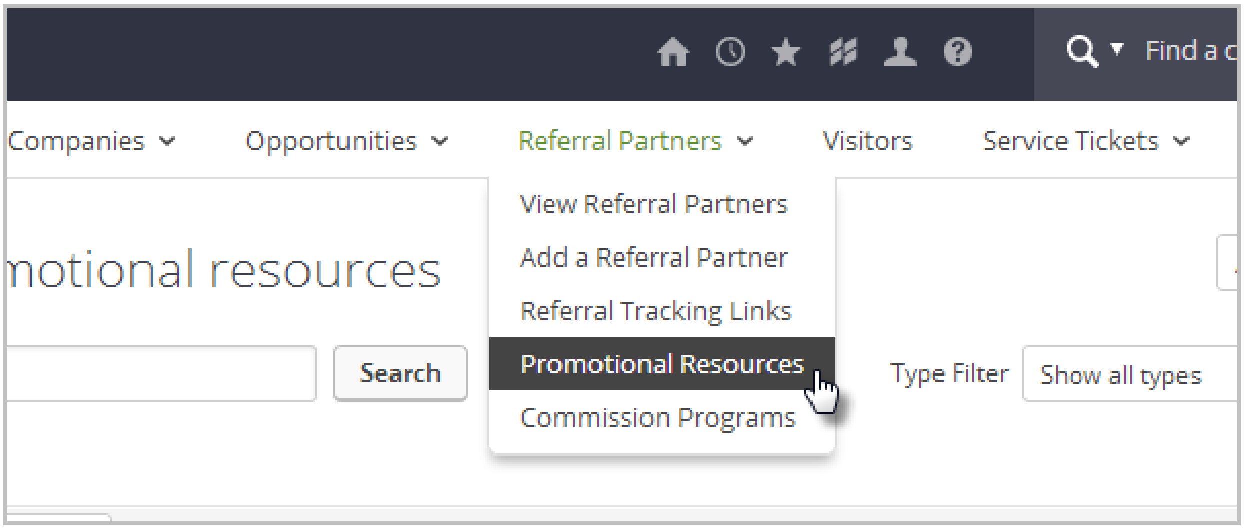
Create And Manage Promotional Emails For Referral Partners

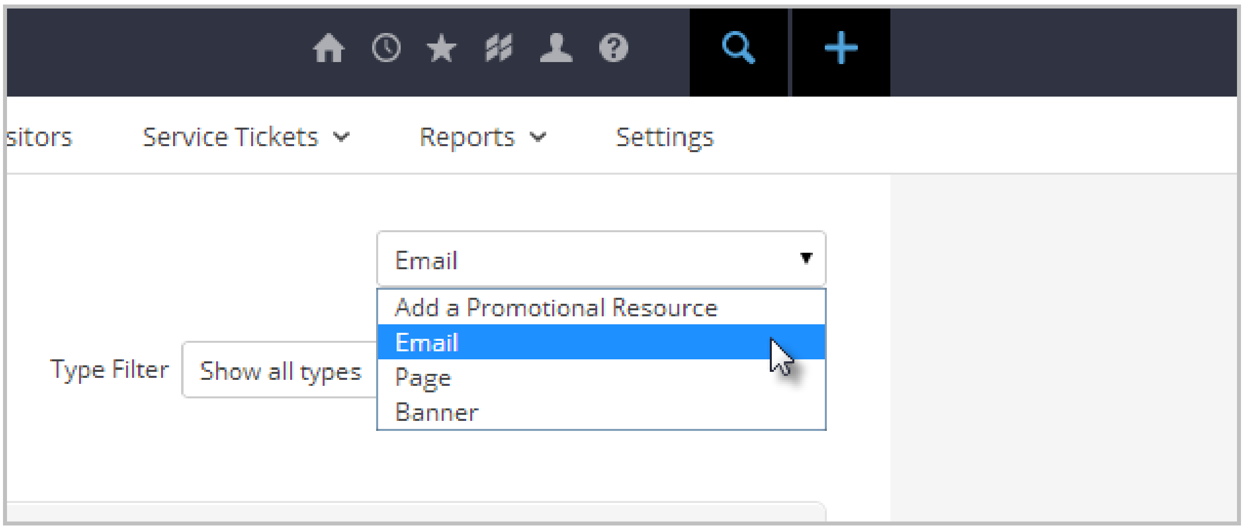
Last Modified on 08/02/2018 3:43 pm MST

Referral partners may actively promote your business by sending a dedicated email to their lists. Emails are used by partners who have a significant list (complementary businesses, industry influencers, professional affiliates.) Partners can just copy an email from the Referral Partner Center, paste it into their own email program, and send it to their list.

1. Go to **CRM** > **Referral Partners** in the main navigation menu
2. Select **Promotional Resource** from the Referral Partners menu.

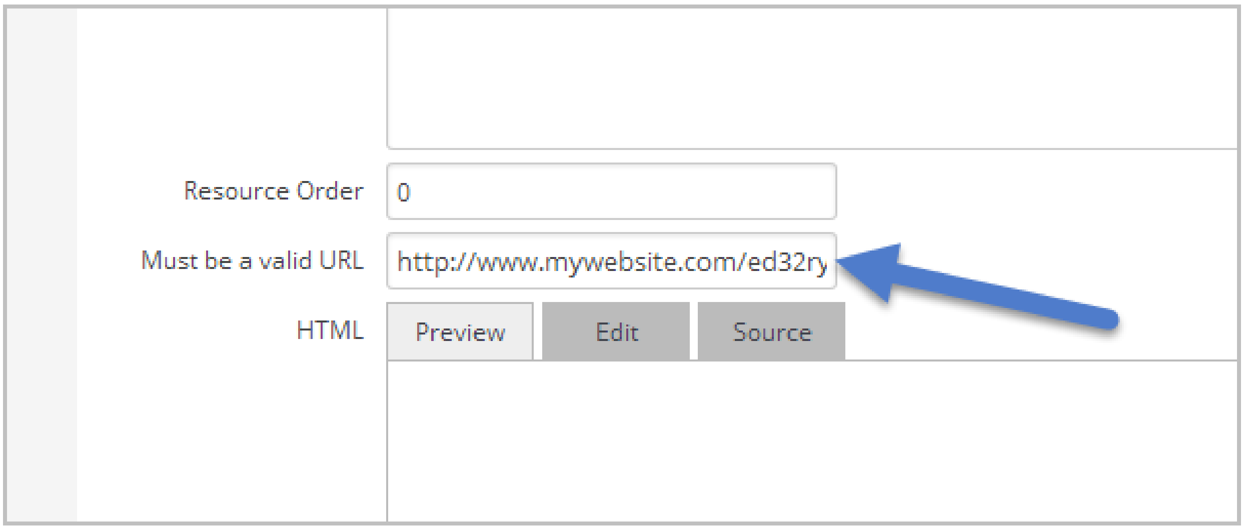


3. Select **Email** as the resource type.

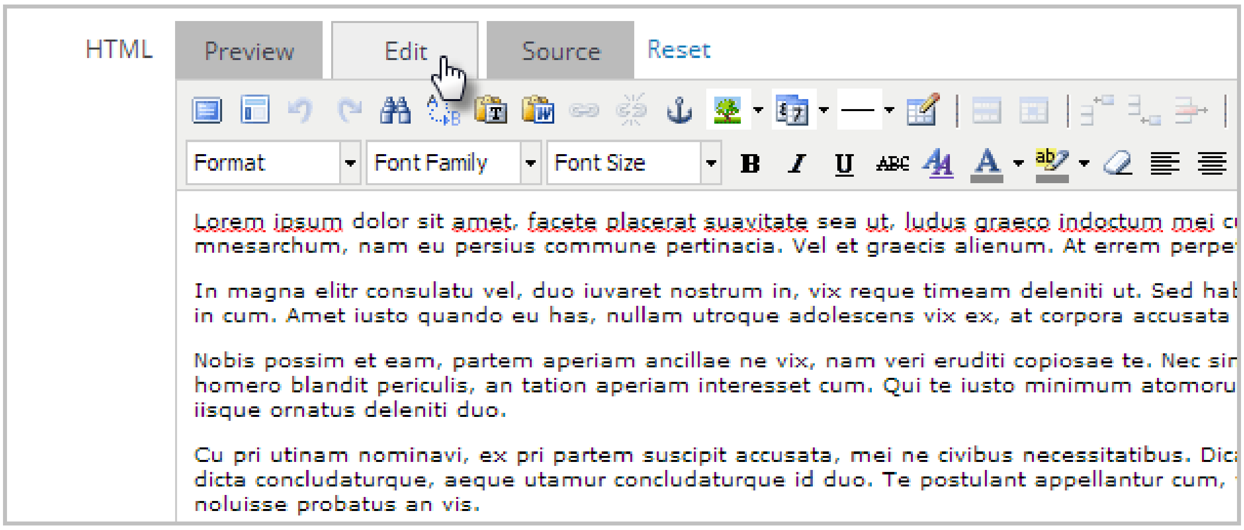


4. Go to the Information section
    - **Title**: This is visible to both you and your partners. It should be short, descriptive, and be related to the content of the email.
    - **Notes**: The notes are also visible to you and your partners. You can use this field to recommend an audience, a subject line, date range limits, etc.
    - **Resource Order**: The order number determines where this email falls in the email resource list in the Referral Partner Center. Use it to put the most important email resources at the top of the list.

5. Create the email using one of these options
    - **URL**: Enter a URL to an email designed outside of Infusionsoft that is hosted online. This allows you to use an outside resource to create and update the email HTML without logging on to your Infusionsoft system. If you use this option, it will override an email created in Infusionsoft using the HTML editor.



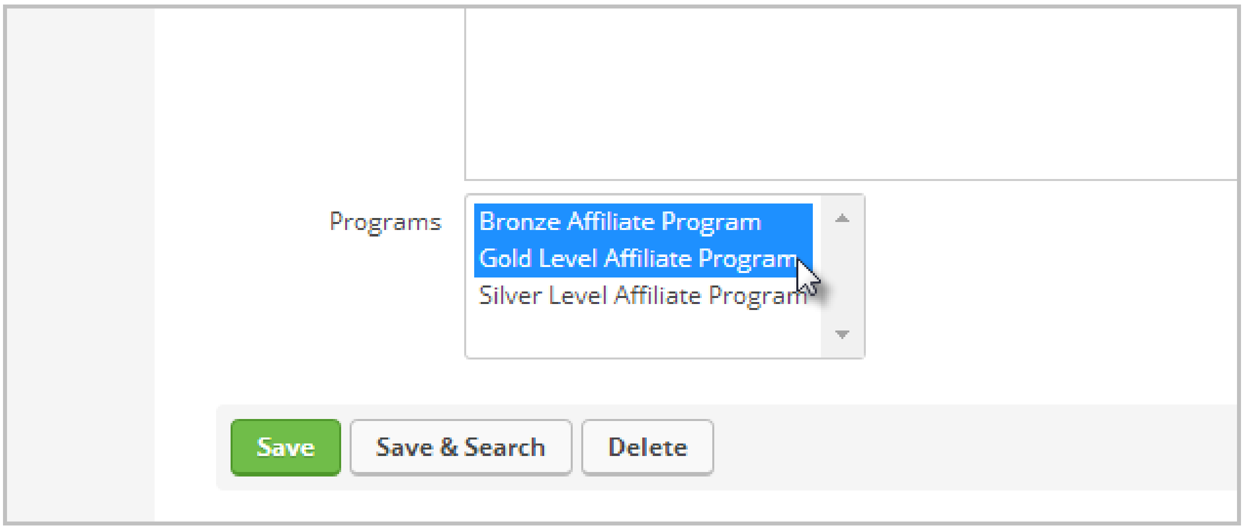
- **HTML**: Create an email using the Infusionsoft WYSIWYG editor. You can create the email in Infusionsoft or paste in the HTML source code that has been created outside of Infusionsoft. Note: If you don't know how to create beautiful HTML emails using the WYSIWYG editor, go to the template library to create a pretty email using the drag & drop Builder. After you save it, convert it to the code builder. You can copy the HTML source code from this builder and paste it into the source tab here.



> **Pro Tip!**
> You can insert a merge field so that when your referral partners copy the email, each referral partner's unique tracking code is inserted into the email. The merge field is ~TRACKING~

6. (Optional) Limit access. By default, all of your referral partners are able to access this email. Click on the name of a referral program if you want to limit access so that only

the partners in the selected program can view and use this email. Hold down the *Ctrl* key on your keyboard to select more than one program.



7. Click on the **Save** button to create or update the email resource. This will automatically update the Referral Partner Center so that partners can start using this resource. They will copy and paste the email into their own email program to send it to their contacts.

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Create And Manage Promotional Pages For Referral Partners

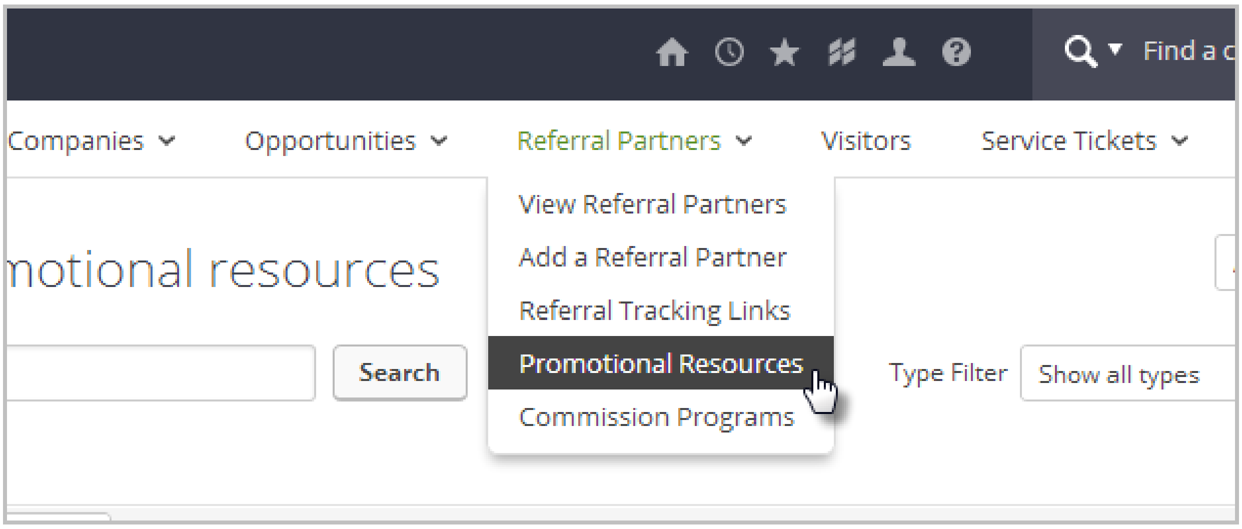
Last Modified on 08/02/2018 3:43 pm MST

These pages are designed to train and educate your referral partners so they can do a good job marketing for you. Provide your partners with easy-to-access information about new products, product benefits, etc. or teach them how to use new marketing strategies (social media, blogging, etc.)

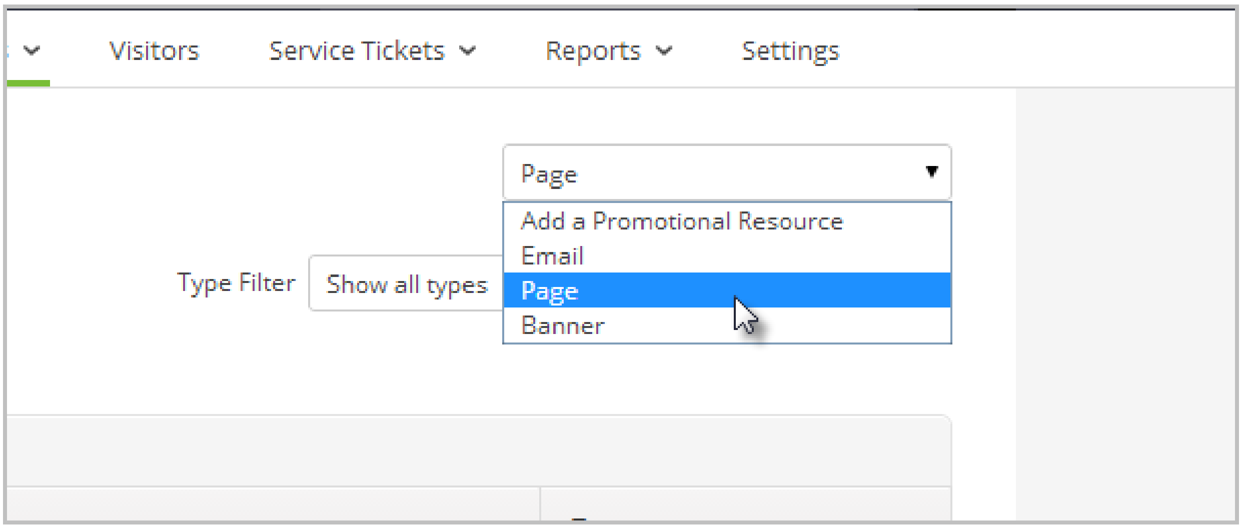
You can either copy the content of the Resource Page into the HTML Editor, or you can link to an existing web page by entering the url in the *Must be a valid URL* field.

1. Go to **CRM** > **Referral Partners** in the main navigation menu

2. Select **Promotional Resources** from the Referral Partners menu.

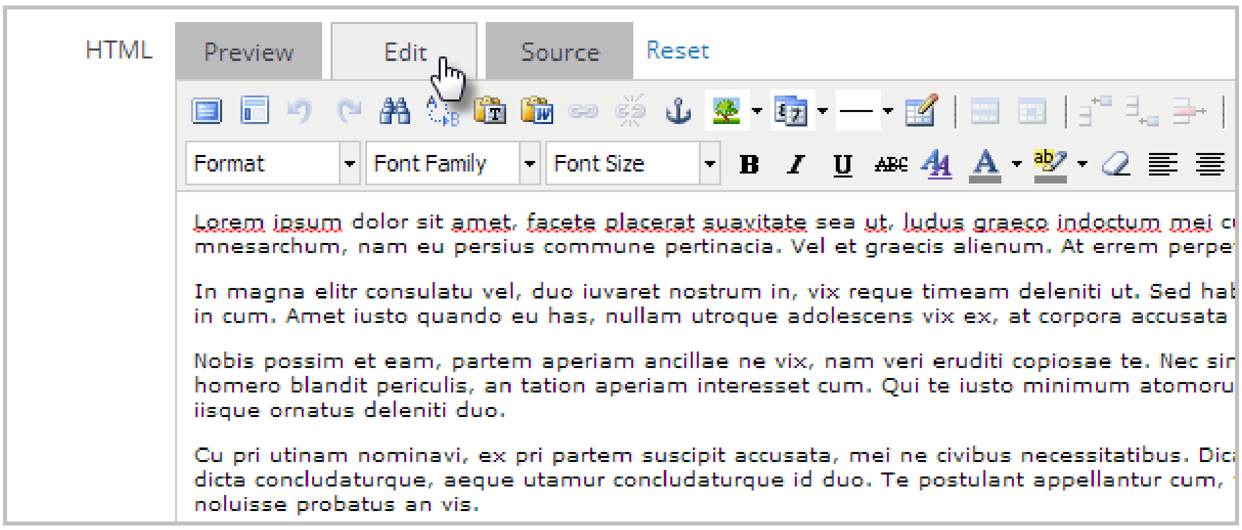


3. Select **Page** as the resource type.

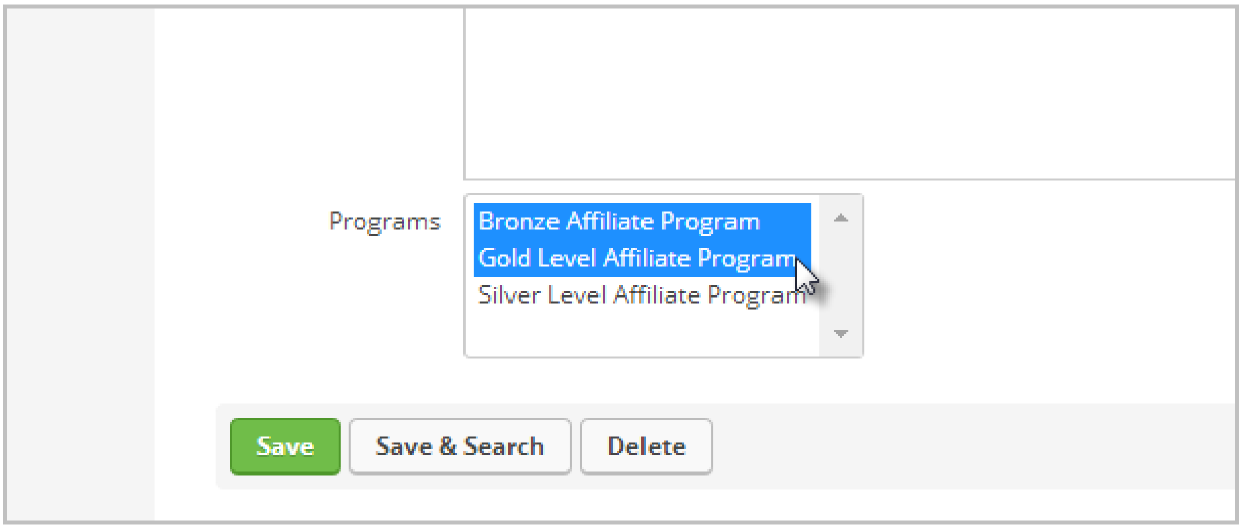


4. Go to the Information section
    - **Title**: This is visible to both you and your partners. It should be short, descriptive, and be related to the content of the email.
    - **Notes**: The notes are also visible to you and your partners. You can use this field to recommend an audience, a subject line, date range limits, etc.
    - **Resource Order**: The order number determines where this email falls in the email resource list in the Referral Partner Center. Use it to put the most important email resources at the top of the list.
    - (optional) Enter a URL to a web page that was designed outside of Infusionsoft and is hosted online. This allows you to use an outside resource to create and update the page without signing in to your Infusionsoft account. If you use this option, it will override an page created in Infusionsoft using the HTML editor.
    - **Page Width**: The width (in px) of the page to be displayed in the resource center.
    - **Page Height**: The height (in px) of the page to be displayed in the resource center.

5. Create the page using the HTML editor (leave this blank if you entered the URL above in the *Must be a valid URL* field.)



6. (Optional) Limit access. By default, all of your affiliates are able to access this page. Click on the name of a referral program if you want to limit access so that only the partners in the selected program can view and use this page. Hold down the *Ctrl* key on your keyboard to select more than one program.



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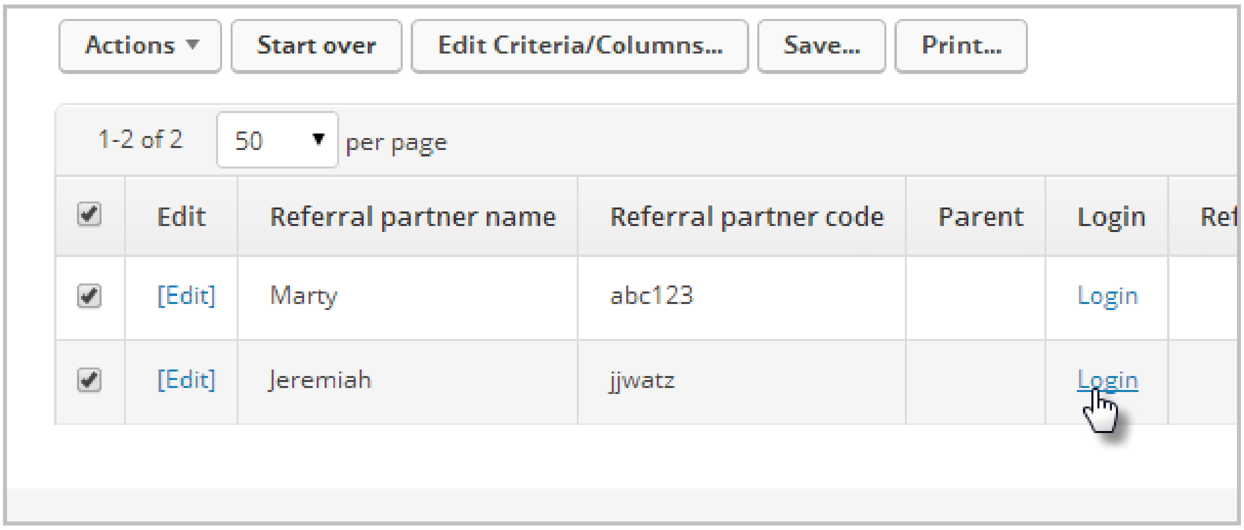
Preview The Referral Partner Center

Last Modified on 08/02/2018 3:43 pm MST

After you create the referral tracking links and promotional resources, you may want to preview them in the Referral Partner Center. You can do this by creating a referral partner record for yourself and/or logging into the Referral Partner Center as an existing partner.

1. Go to **CRM** > **Referral Partners** to search for a partner to sign in as
2. Click on **Login** beside the referral partner record.


Actions
Start over
Edit Criteria/Columns...
Save...
Print...
1-2 of 2
50
per page
Edit
Referral partner name
Referral partner code
Parent
Login
Ref
[Edit]
Marty
abc123
Login
[Edit]
Jeremiah
jjwatz
Login

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Sign In And Navigate The Referral Partner Center

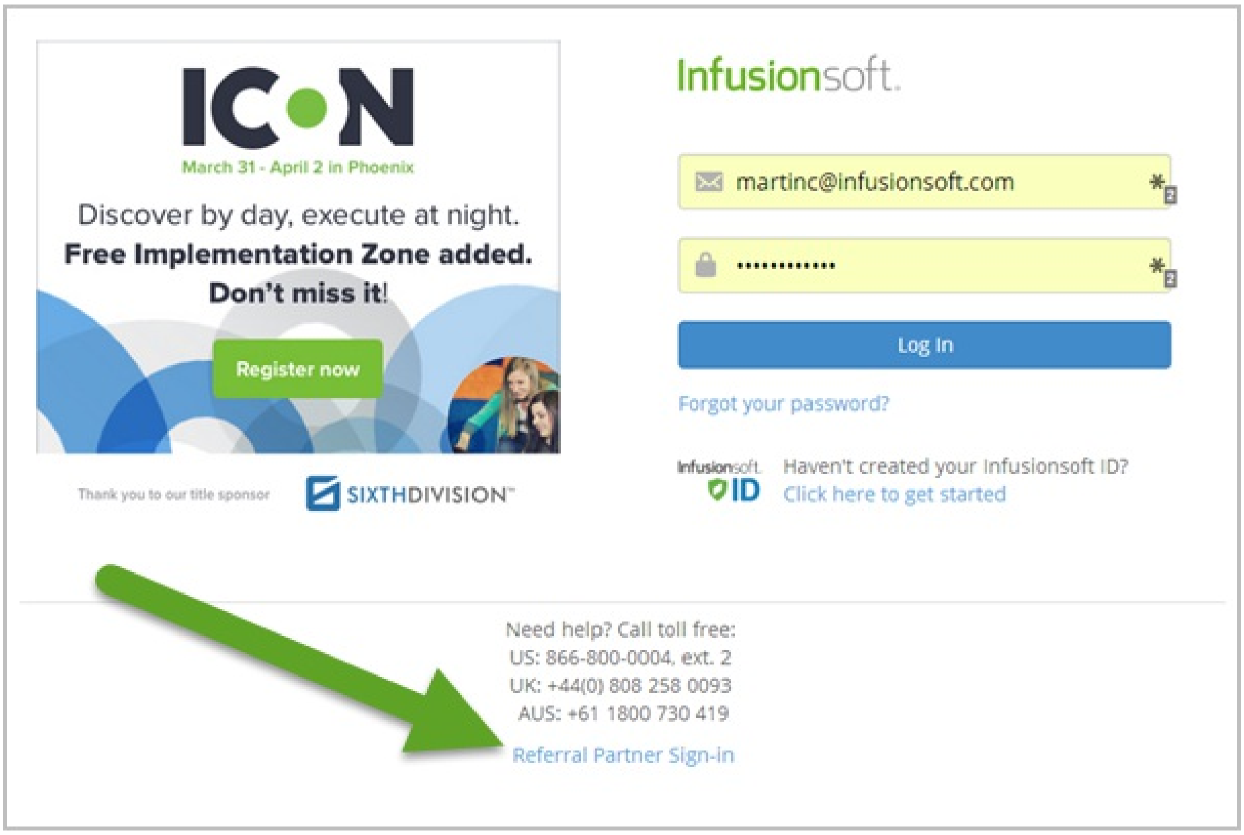
Last Modified on 08/02/2018 3:44 pm MST

The Referral Partner Center is a password-protected portal that your referral partners use to access their referral reports, generate redirect links, and acquire marketing and help materials that you provide for them (banner ads, email copy, etc...) The Referral Partner Center will give your referral partners easy access to the tools and information they need to be successful.

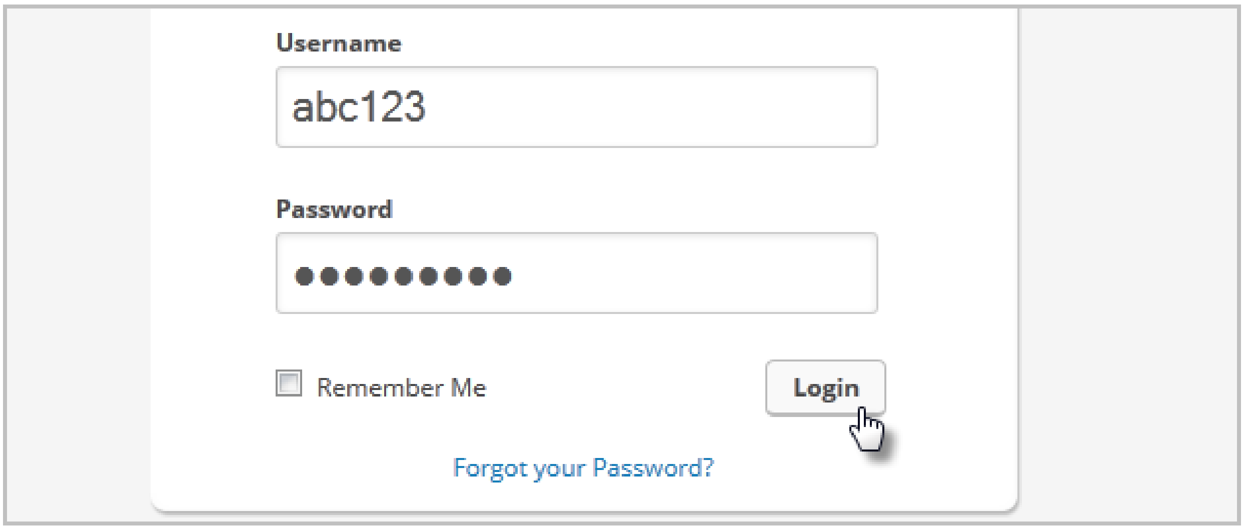
Sign in to the Referral Partner Center

1. Have your referral partner go to your account sign in page (https://youraccount.infusionsoft.com). Below the main sign-in form, you will notice a link that says, **Referral Partner Sign-in**

2. They will then click the **Referral Partner Sign-in** link.

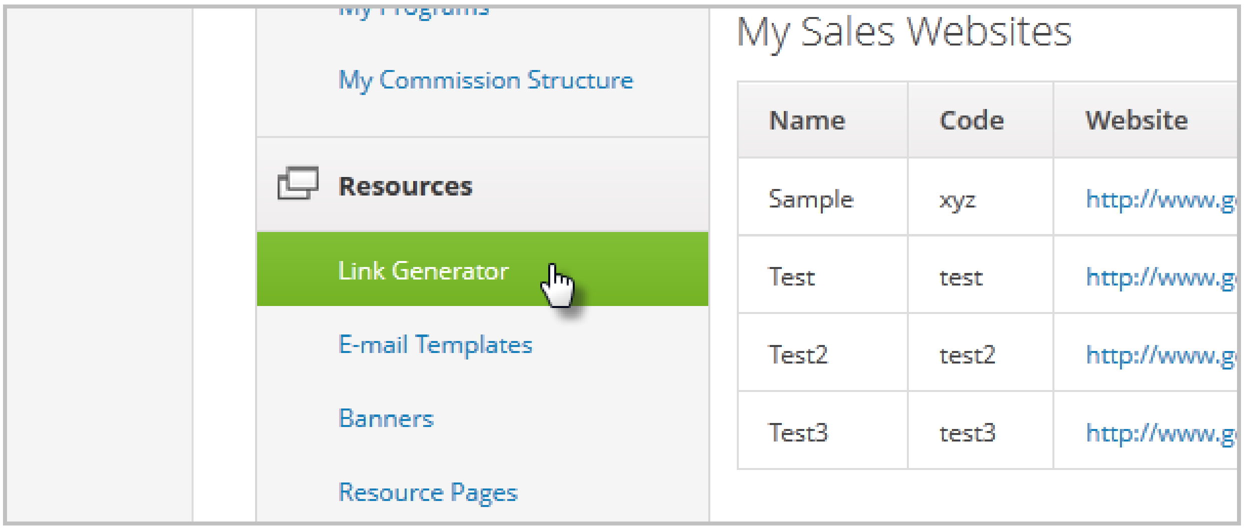


3. The partner will then enter their sign-in credentials. Each referral partner is assigned a unique code. The code is their username. They also need a password, which is usually created by them when they first signed up as a referral partner on your website.



Navigate the Referral Partner Center

Navigation is performed by clicking on the relevant menu option on the left-hand side of the page. There are three menu categories: **Home**, **Resources**, and **Reports**.



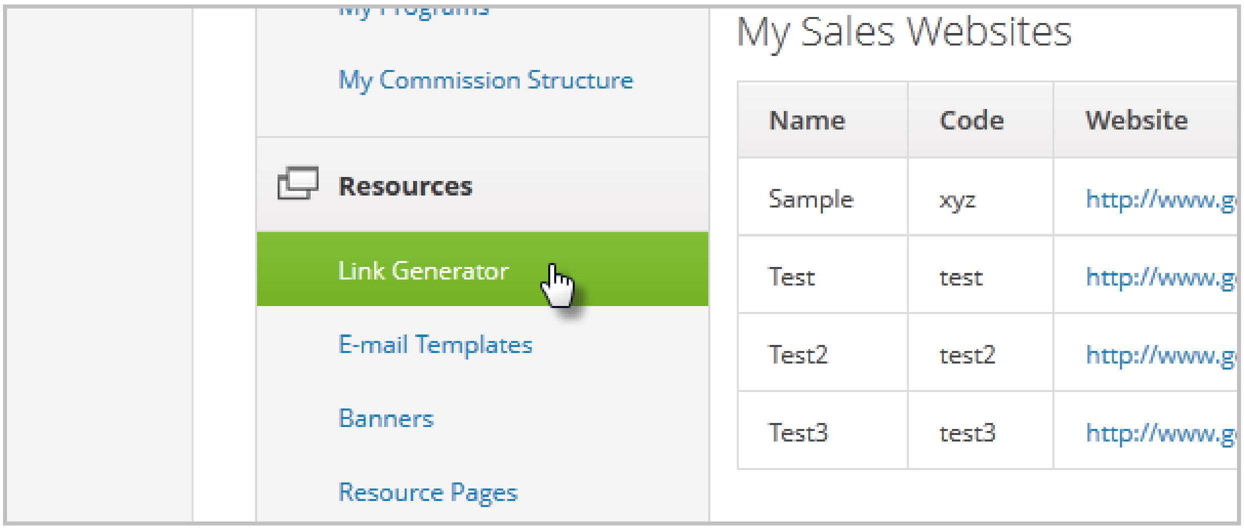
- **Home**: The Home section gives partners access to update their contact information and the ability to view information regarding their commission program(s). You can choose to show or hide these individual menu options in **CRM** > **Settings** > **Referral Partner Center**.
    - Welcome: Shows the welcome message that you can edit in **CRM** > **Settings** > **Referral Partner Center**.
    - My Profile: Gives the partner access to view and update their profile information.
    - My Programs: Gives the partner access to a list of the program(s) they are enrolled in and the description you entered when you created the program.
    - My Commission Structure: Gives the partner access to the specific commission fees/percentages for their program(s).
- **Resources**:The Resources section gives partners access to the tools they need to promote your products/services
    - They can generate their redirect links
    - They can access your promotional material: Advertising banners, Email Copy, and Resource Pages
- **Reports**: The Reports section gives partners access to commission, lead tracking, and sales reports. The **My Ledger** report will be a valuable tool they can use to access their financial earnings.

How Referral Partners Generate Tracking Links

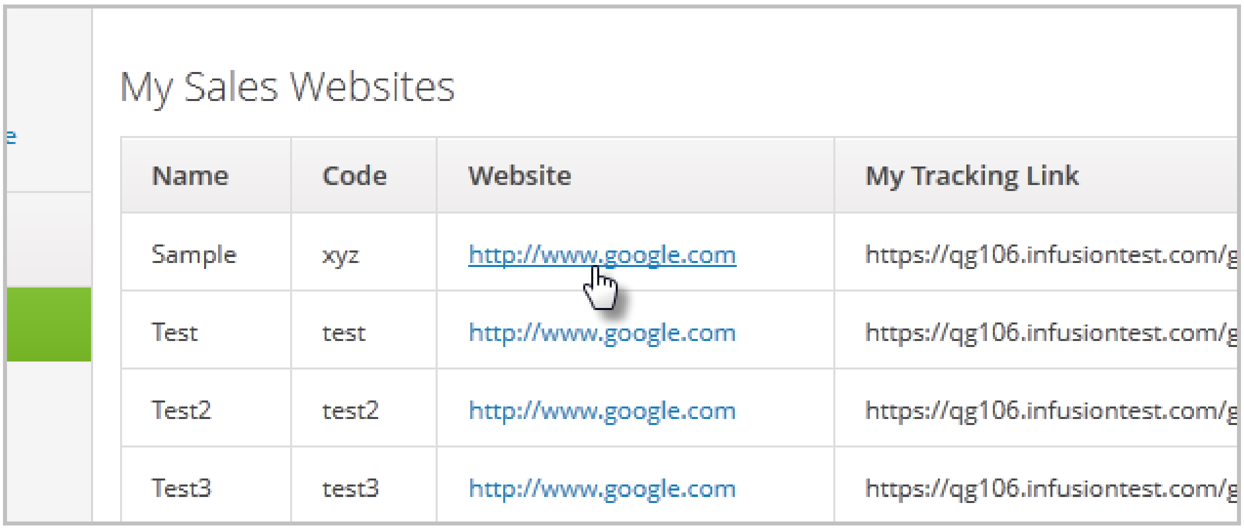
Last Modified on 08/02/2018 3:45 pm MST

Partners use the link generator in the Referral Partner Center to create and copy tracking links that they can use in websites, blog articles, social media, newsletter emails, and more.

1. After signing in, the partner will click on the **Link Generator** link in the Resources menu.



2. The *My Sales Websites* section lists the referral tracking links this partner has access to. The partner can click on the Website URL to view the site the link connects to.

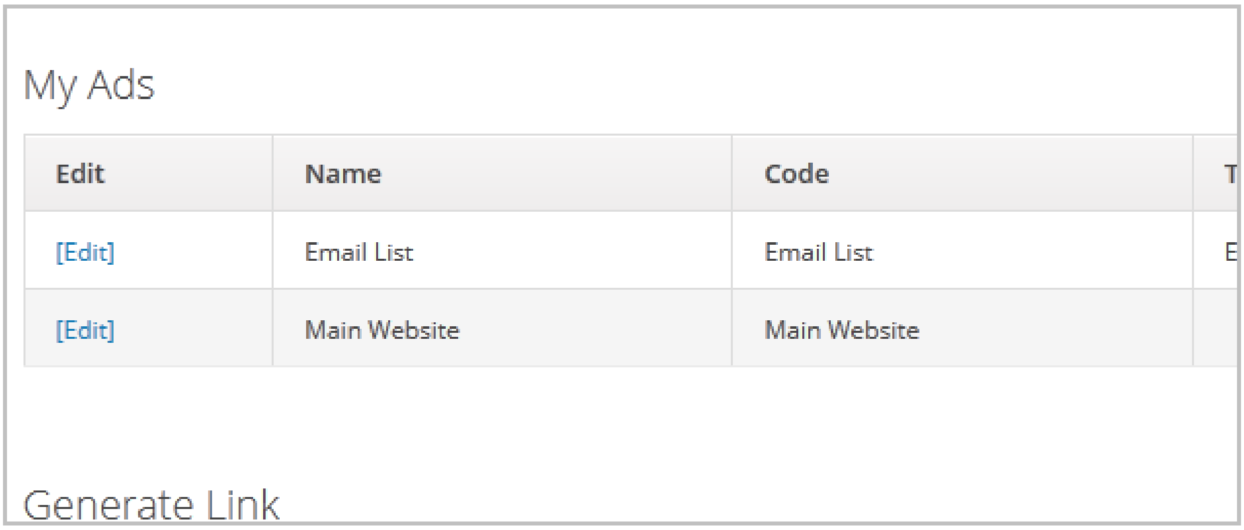


3. The *My Referral Partners* section lists any child referral partners. The child partners are the partners this person recruited into your program.

My Referral Partners

Code	Name
swdf	jj
aapex	Professional Organization
a8787	Professional Organization

4. The *My Ads* section is completely controlled by the partner. This is a way to track the ads they've created to promote your business. This option creates an ad code that is appended to the redirect link. This will give the partner separate statistics in the Link Tracking Stats report.

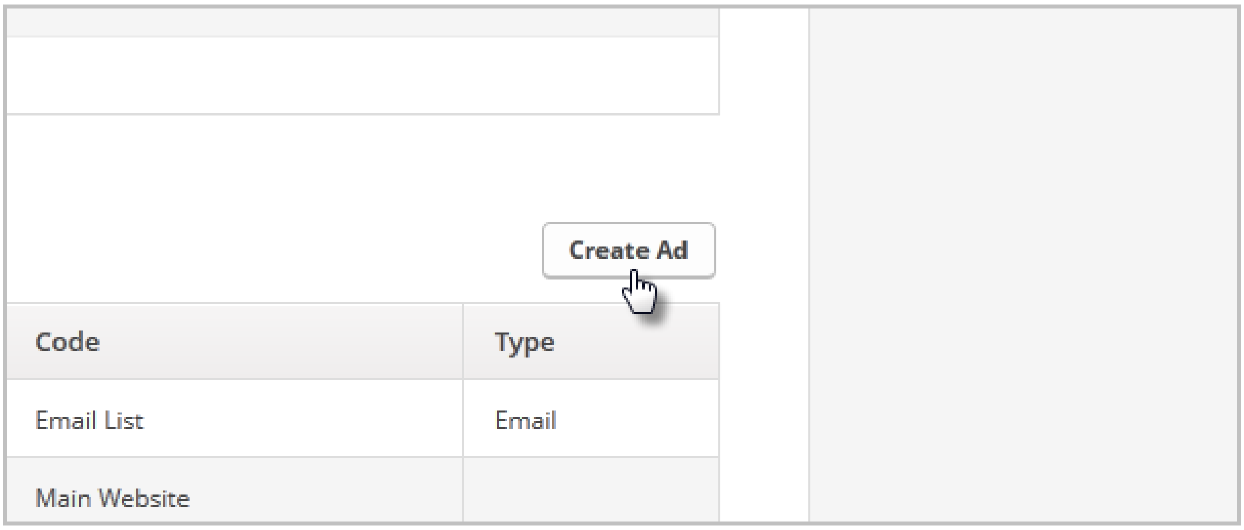


My Ads

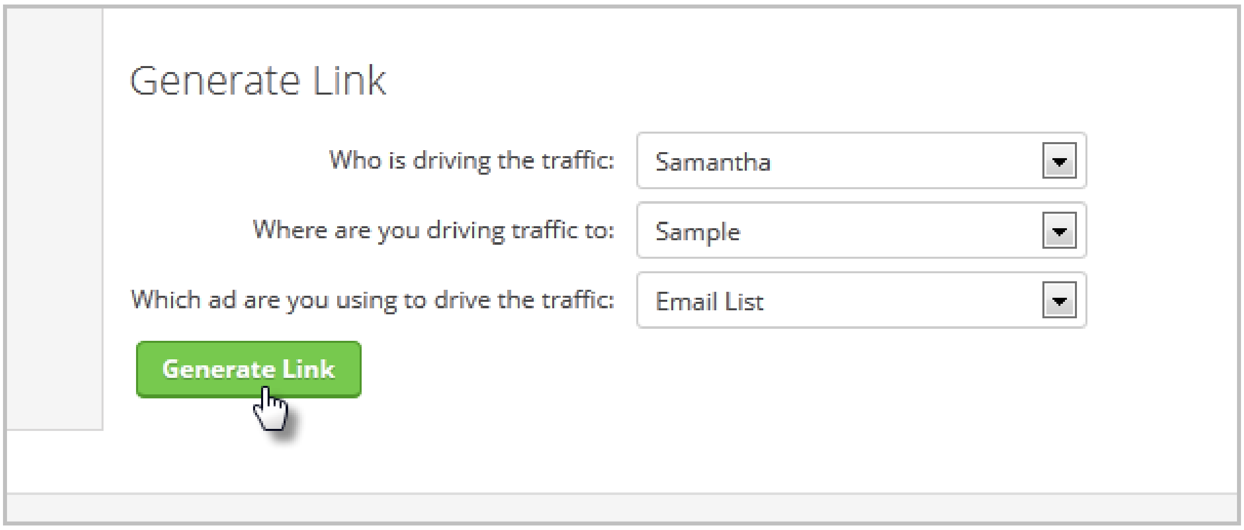
Edit	Name	Code
[Edit]	Email List	Email List
[Edit]	Main Website	Main Website

Generate Link

5. The partner clicks on **Create Ad** to enter a name, description, media type, and start date



6. The Generate Link section is where the partner chooses the options for a tracking link.



   - **Who is driving the traffic**: The referral partner's name is selected by default. A parent partner can choose a child partner from the drop-down list to create a link for them instead so that the child partner will get credit for the leads and/or sales.
   - **Where are you driving traffic to**: The referral partner will select one of the redirect links you made for them from the drop-down list.
   - **Which ad are you using to drive the traffic**: If the referral partner created an Ad (see above), they can choose an ad from the drop-down list to include an ad code in the link.

7. The partner clicks on the **Generate Link** button to create a custom URL with all of the options selected above.
   Let's break down a sample redirect link:
   https://martyc.isrefer.com/go/*haircare/abc123/website2*
   - *haircare* is the code for the tracking link that you created.

- *abc123* is the unique referral partner's code.
- *website2* is the optional Ad that the referral partner created for this redirect link.

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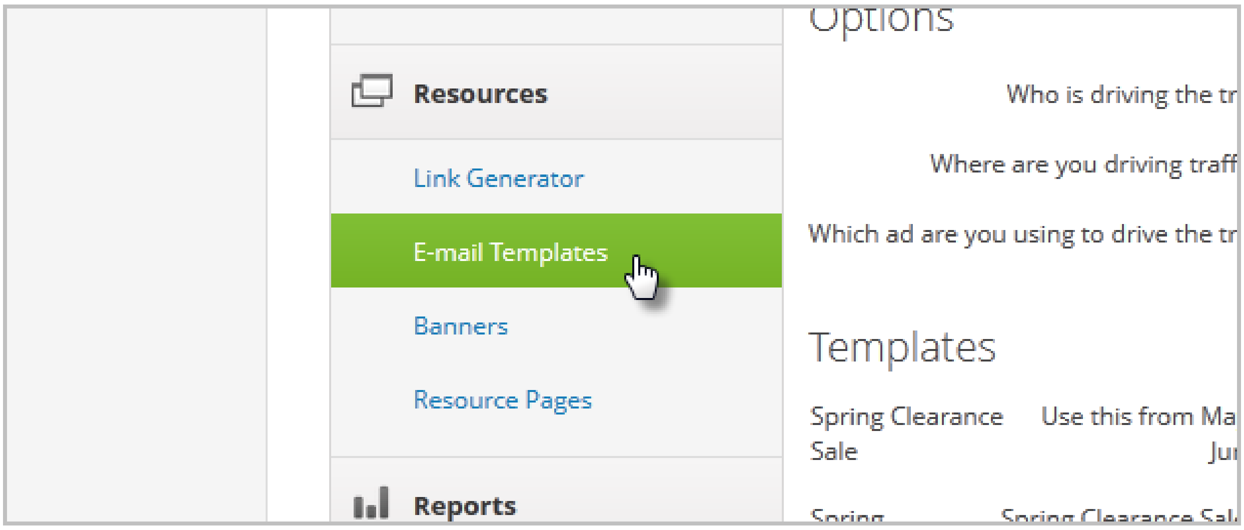
How Referral Partners Use Email Resources

Last Modified on 08/02/2018 3:45 pm MST

Referral partners can copy email templates that you have provided from the Referral Partner Center and paste them into their own email program to send an email to their contacts.

1. The partner will click on the **E-Mail Templates** link in the Resources menu section.



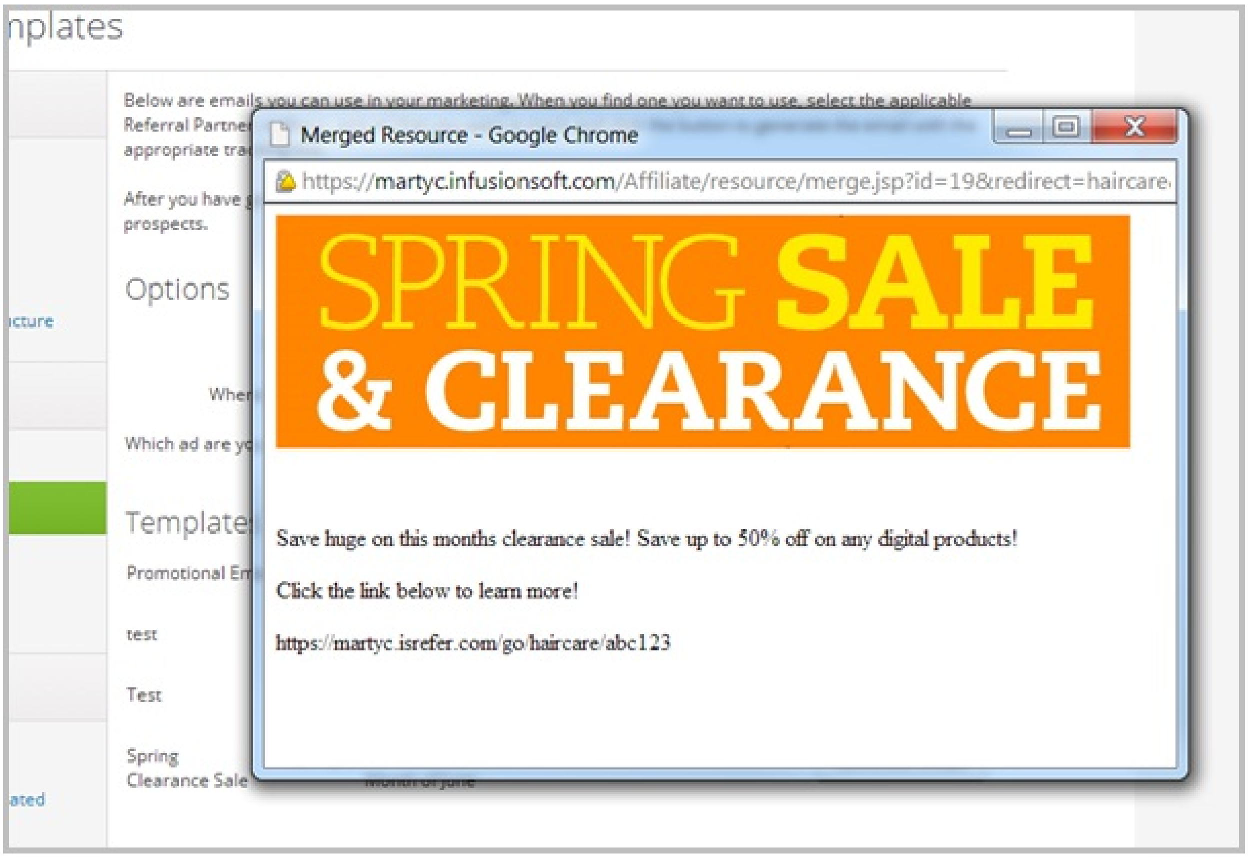
The drop-downs under the *Options* section give the partner control over the link that shows up in the email.

- **Who is driving the traffic**: The referral partner's name is selected by default. A parent partner can choose a child partner from the drop-down list to create a link for them instead so that the child partner will get credit for the leads and/or sales.
- **Where are you driving traffic to:** The referral partner will select one of the sales websites from the drop-down list.
- (Optional) **Which ad are you using to drive the traffic:** If the referral partner is using ad tracking, they can choose an ad from the drop-down list to include an ad code in the link.

2. The partner will click on the **Generate Email** button to grab the email. The link they selected from the "Where are you driving traffic" option list will be merged into the email wherever you've used the ~TRACKING~ merge code when creating the

promotional email.

3. The partner will highlight the email template to copy it and paste it into their own email program to send



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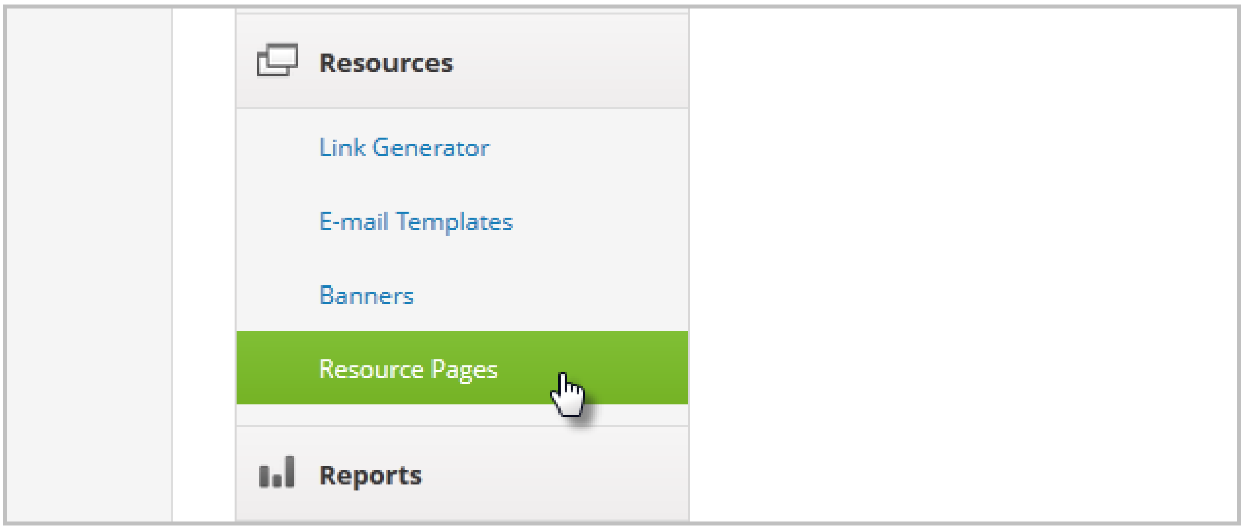
How Referral Partners Use Resource Pages

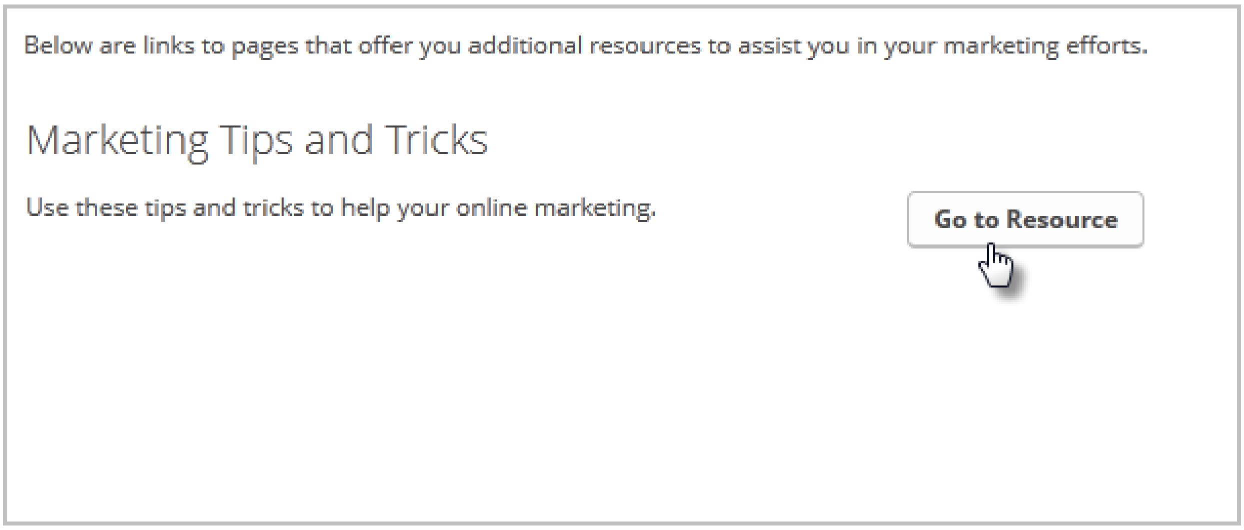
Last Modified on 08/02/2018 3:46 pm MST

Referral partners will log into your Referral Partner Center to access the resource pages you create. These pages are designed to train and educate your referral partners so they can do a good job marketing for you. Provide your partners with easy-to-access information about new products, product benefits, etc. or teach them how to use new marketing strategies (social media, blogging, etc.)

1. After signing in, the referral partner will click on the **Resource Pages** link in the Resources menu.



2. The partner can see the page title and notes, but will need to click on the **Go to Resource** button to view the resource page contents.


Below are links to pages that offer you additional resources to assist you in your marketing efforts.
Marketing Tips and Tricks
Use these tips and tricks to help your online marketing.
Go to Resource

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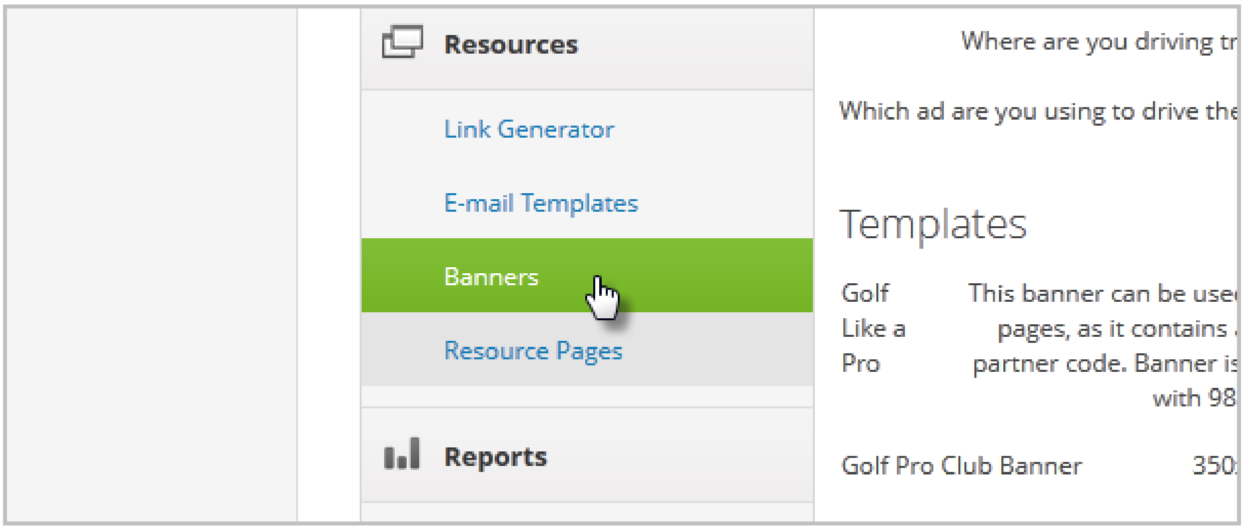
How Referral Partners Use Banner Ads

Last Modified on 08/02/2018 3:46 pm MST

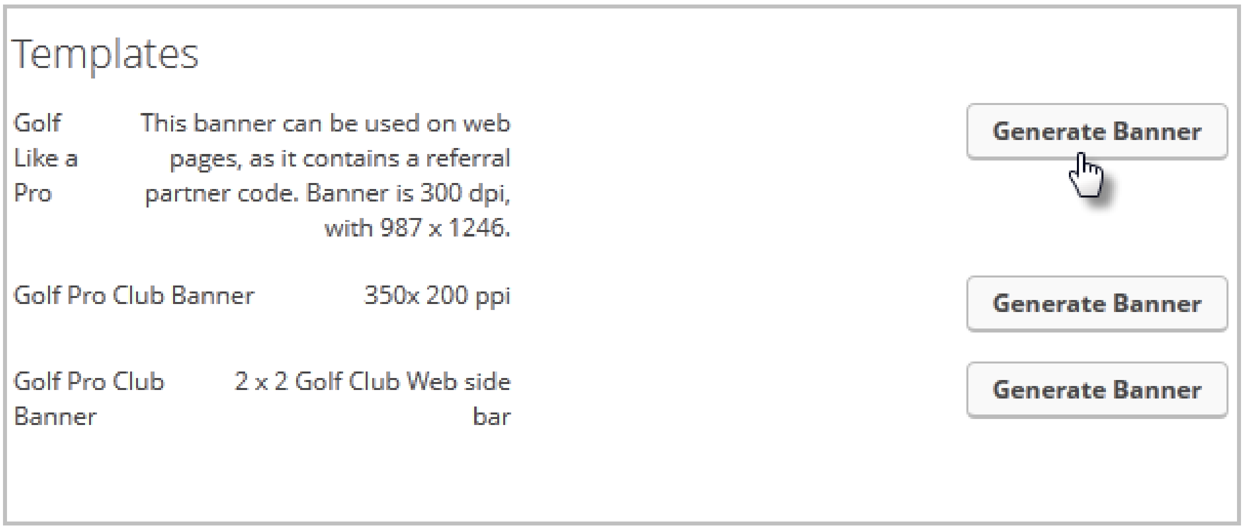
Referral partners will copy the banner embed code from your Referral Partner Center and paste it into web pages or emails. The banner code includes the referral tracking link so that the partner will get credit for the prospects and customers they send to you.

1. The partner will click on the **Banners** link in the Resources menu

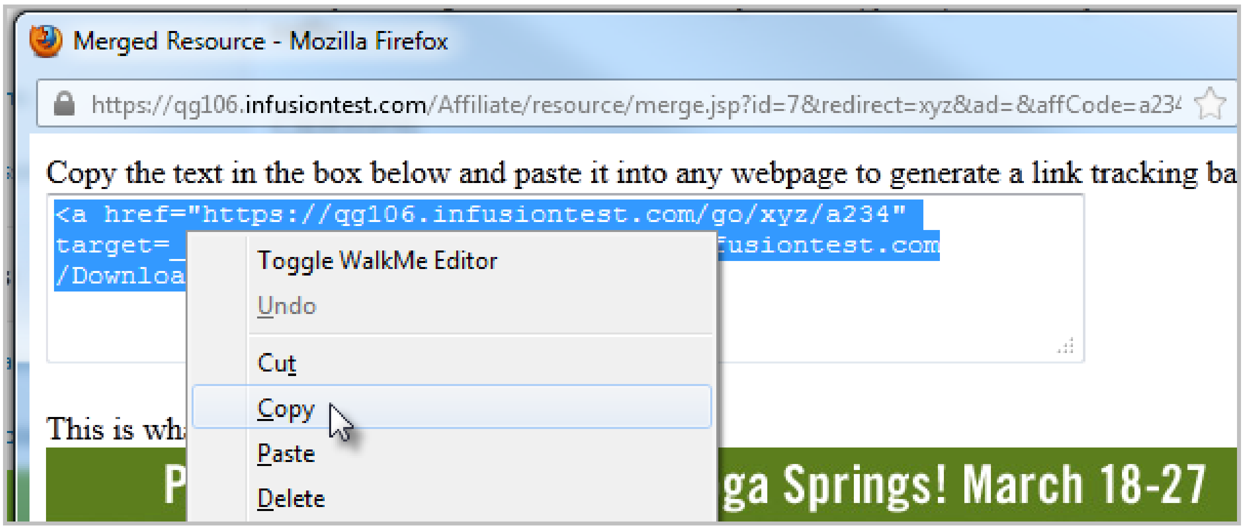


   - **Who is driving the traffic**: The referral partner's name is selected by default. A parent partner can choose a child partner from the drop-down list to create a link for them instead so that the child partner will get credit for the leads and/or sales.
   - **Where are you driving traffic to**: The referral partner will select one of the sales websites from the drop-down list.
   - (Optional) **Which ad are you using to drive the traffic**: If the referral partner is using ad tracking, they can choose an ad from the drop-down list to include an ad code in the link.

2. The partner will click on the **Generate Banner** button to view the banner and copy the embed code.



3. The partner will highlight the embed code to copy it and will then paste it into a website or HTML email (e.g. a newsletter broadcast.)



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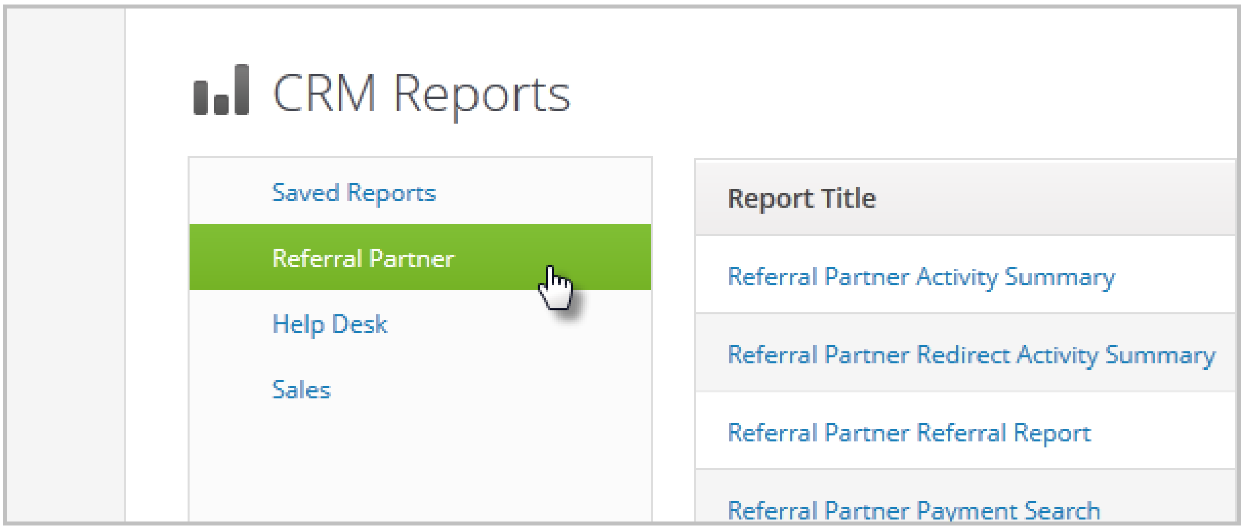
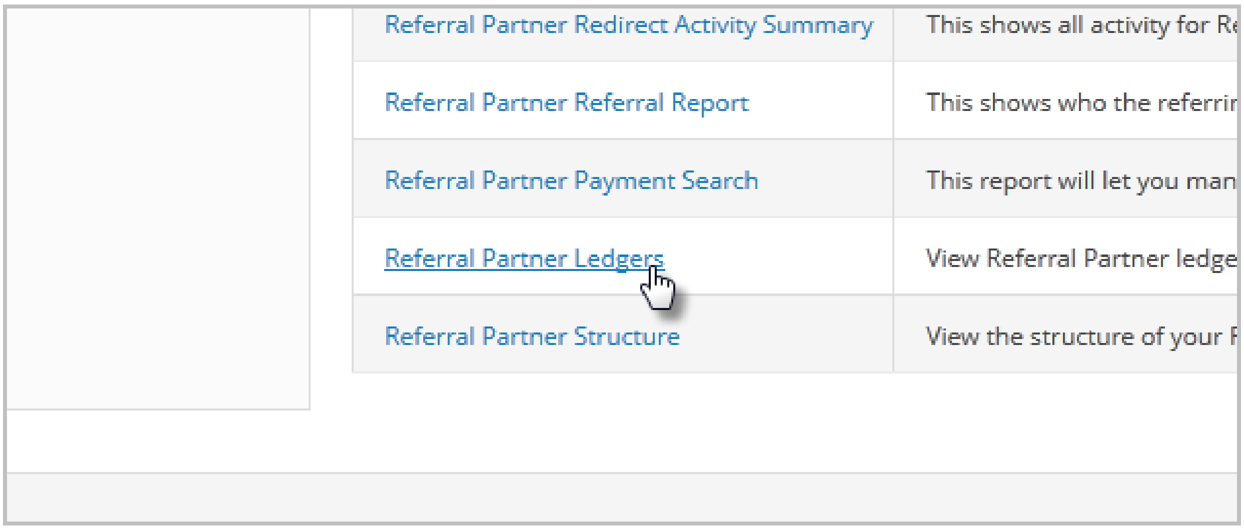
How To Use Referral Program Reports

Last Modified on 08/02/2018 3:48 pm MST

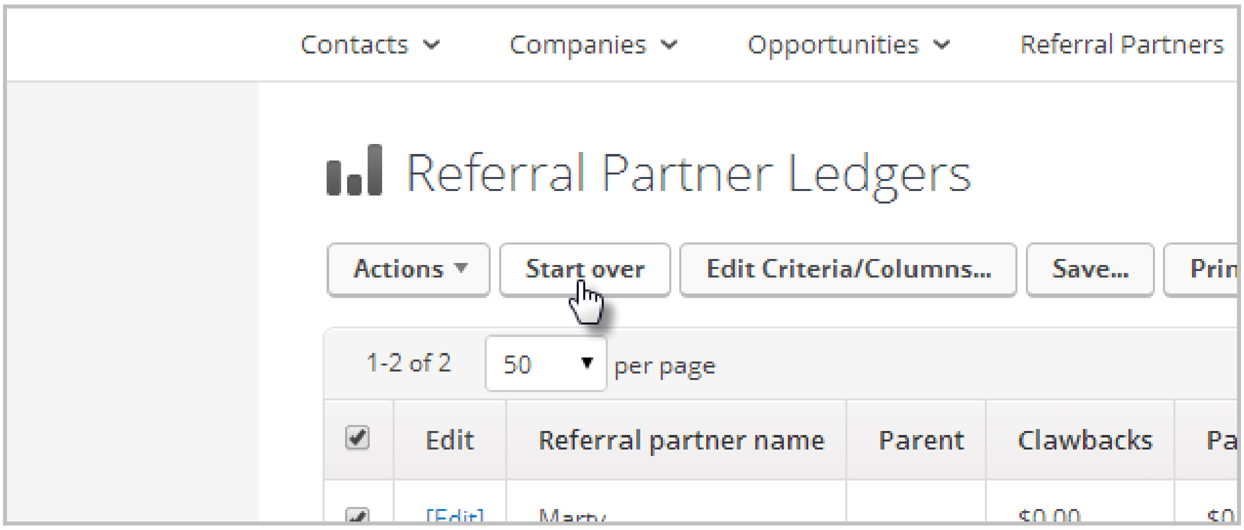
1. Got to **CRM** > **Reports** > **Referral Partners**



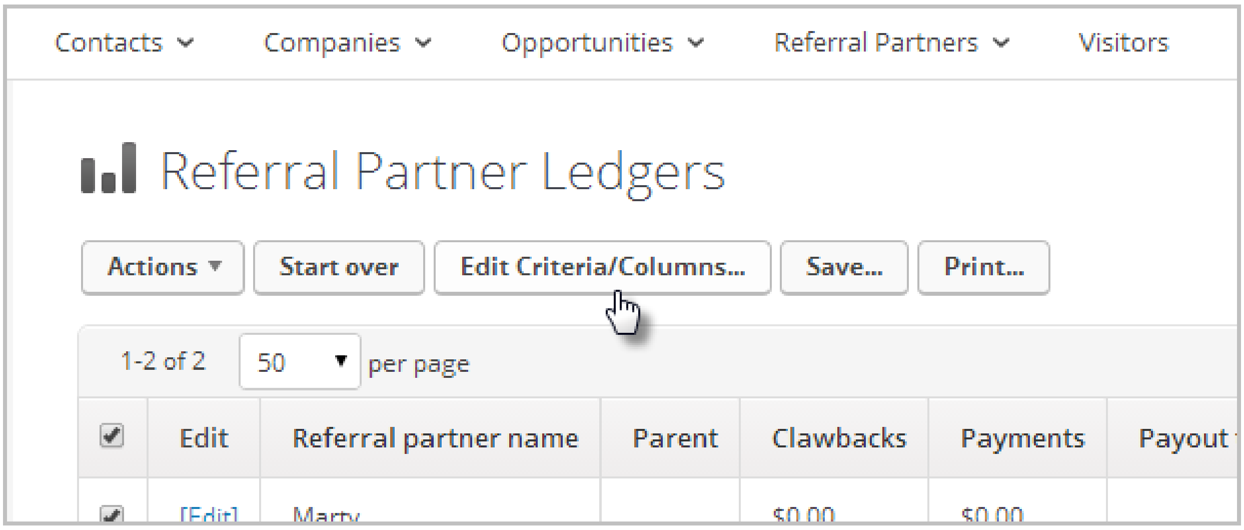
2. To view a report, just click the report title.



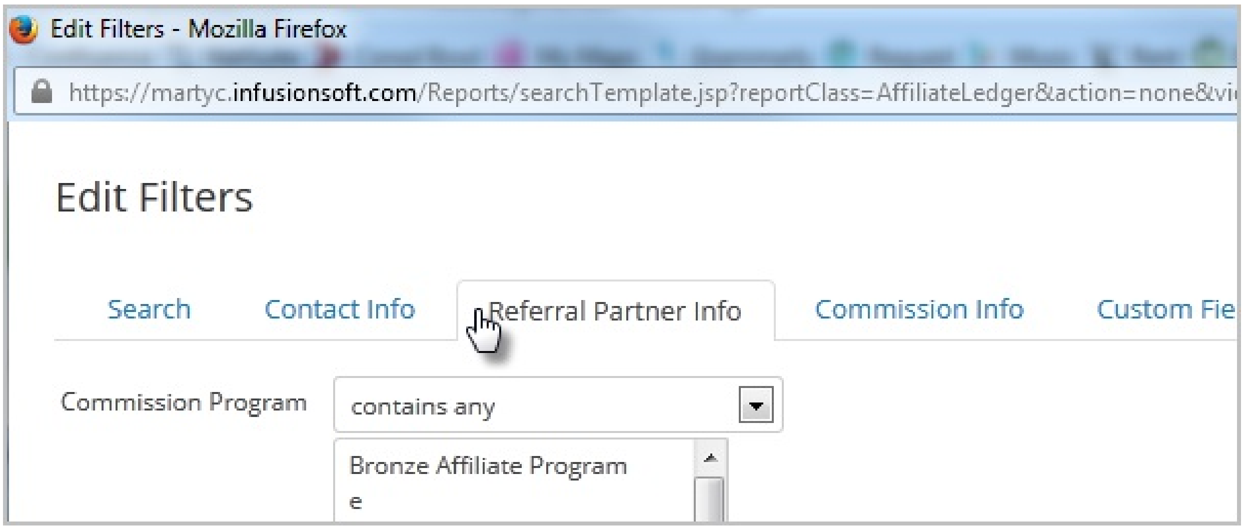
3. To clear the search results, click on the **Start Over** button.



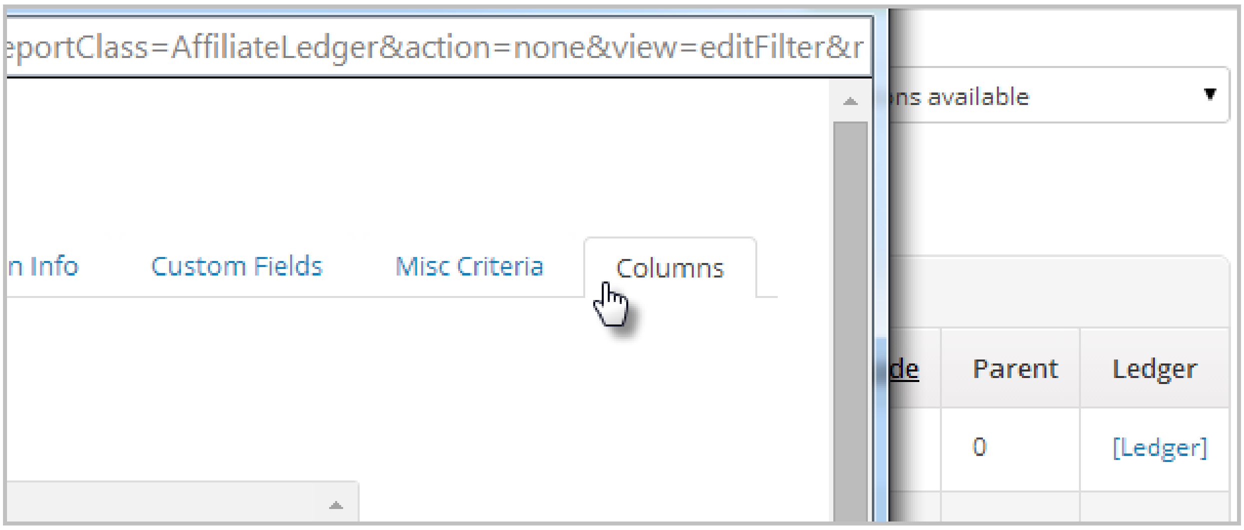
4. To create a filter for this report, click on the **Edit Criteria/Columns** button.



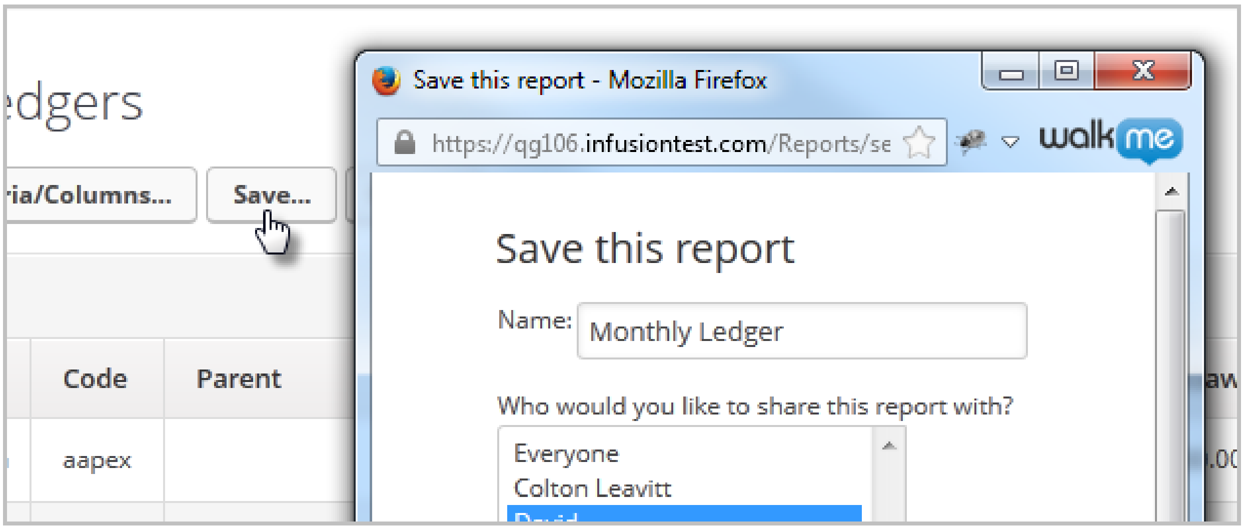
5. Use the tabs at the top to navigate through all of the available filters.



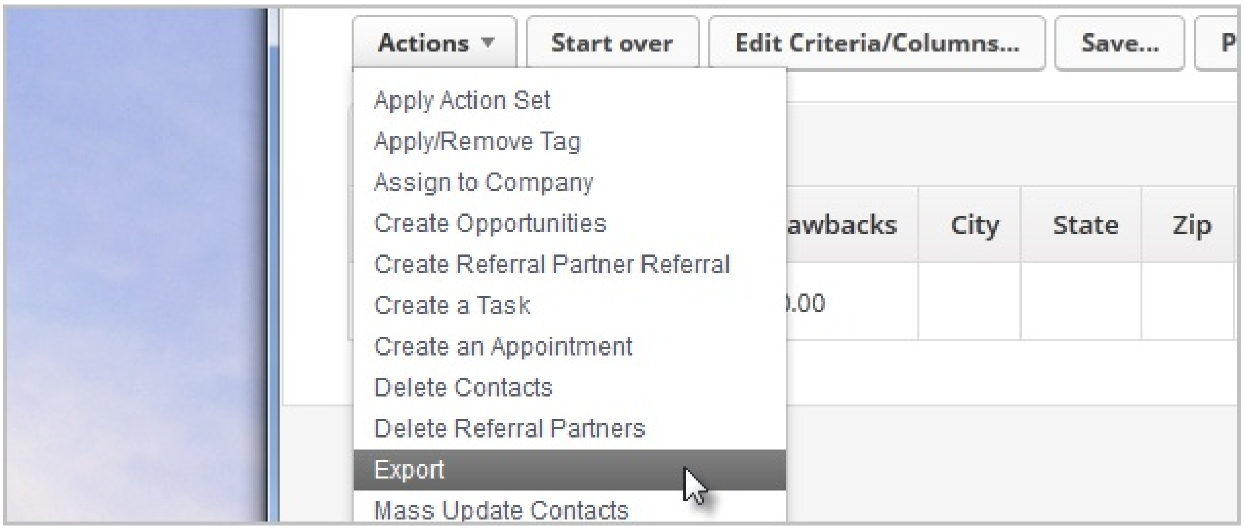
6. Click on the **Columns** tab to customize which fields appear on the report.



7. Once you have completed setting up your report, click the **Save** button (and check the box to add the report to your dashboard.)



8. Click the **Actions** button to see all of the available options. For example, you can export the report into a .csv file from here.



Monitor Referral Partner Activity

Last Modified on 08/02/2018 3:49 pm MST

As an affiliate program manager, you'll want to be able to see which affiliates are most active so you can reward top performers and / or fulfill on incentives you've promised. There are several Referral Partner Reports (**CRM > Reports > Referral Partners**) that will help you manage your programs and evaluate individual referral partner performance.

Referral Partner Activity Summary

The referral partner activity summary report shows referral partner performance within a specific date range. It summarizes the number of clicks (on a referral tracking link), web form opt-ins (all opt-ins are counted, not just unique opt-ins), and sales. You can filter this report by date range, number of clicks / opt-ins / orders, dollar value of orders, and affiliate. It will also show you the number and value of recurring orders (subscriptions.)

Referral Partner Redirect Activity Summary

The Referral Partner Redirect Activity Summary shows performance for the referral partners' Sales Websites - or the performance for the tracking links available to them. Within the report, you can monitor the number of clicks to the Sales Website, number of opt-ins gained, number of orders, as well as the sum of all orders gained from that sales website. You can edit the report criteria to show Redirect Activity for specific referral partners to help monitor their performance.

Referral Partner Referral Report

The referral partner referral report is more robust. It allows you to search by and display information from the contact record and referral partner record making this report more customizable. You might use this report to view a list of customers who were referred by a specific referral partner within a specific date range. If you apply a product-specific tag when customers buy from you, then you can also narrow down results by products purchased. You can filter this report by referring partner, referred person, Tag(s), referral partner record custom fields, and more.

View Relationships Between Referral Partners

Last Modified on 08/02/2018 3:49 pm MST

Use the *Referral Partner Structure* report (**CRM > Reports > Referral Partners**) to see a summary of the parent/child relationships between your referral partners. This summary is generated when you have a multilevel referral program and your referral partners recruit others to join your program.

The referral partner structure report shows you who is recruiting the most people and helps you identify "orphaned" referral partners. An orphaned referral partner is created when you delete a parent partner from your system. That partner's recruits (child partner) no longer have a parent. Click on a referral partner's name to view and /or edit their referral partner record.

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Generate Referral Partner Commission And Payment Reports

Last Modified on 08/02/2018 3:48 pm MST

The following reports can be used to view the financial activity of your referral partners. Go to **CRM** > **Reports** > **Referral Partner** to view the available reports that will let you see commissions due, clawbacks issued, and payments issued.

Referral Partner Ledgers

The referral partner ledger report shows all financial activity for referral partners within a specific date range, including beginning balance (prior to date range), commissions earned (with the date range), clawbacks (due to refunds or canceled orders), payments issued (within the date range), and an ending balance (beginning balance plus commissions earned minus payments issued and clawbacks). You can filter this report by commission program, code, parent partner, referral partner status, custom fields, tags, and more. In addition to using this report to issue payments, you can use it to:

- Identify top performing referral partner and "graduate" them to the next commission level through a mass update
- Monitor clawback amounts and see which referral partner are generating customers who are a poor fit for your business
- You can also log into your Referral Partner Center with a partner's login through this report and / or view an individual partner's ledger.

Referral Partner Payment Search

The referral partner payment search shows you payments issued to one or more affiliate within a specific date range. You can use this report to view statistics on past payments and / or research an inquiry from a specific referral partner. You can filter this report by batch id, date range, amount, referral partner, tags, and custom fields. This report will also differentiate between manual, one-off payments and batch payments.

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Pay An Individual Referral Partner

Last Modified on 08/02/2018 3:49 pm MST

If you have a large number of referral partners, you will use the referral partner ledger report to view commission balances and issue payment. But, you can also view commissions and issue payment to individuals through the referral partner record.

1. Go to **CRM** > **Referral Partners** to find the partner you want to pay.

2. Click on the **Start over** button to clear previous search results if necessary.

3. Click on **Edit** to view the referral partner record.

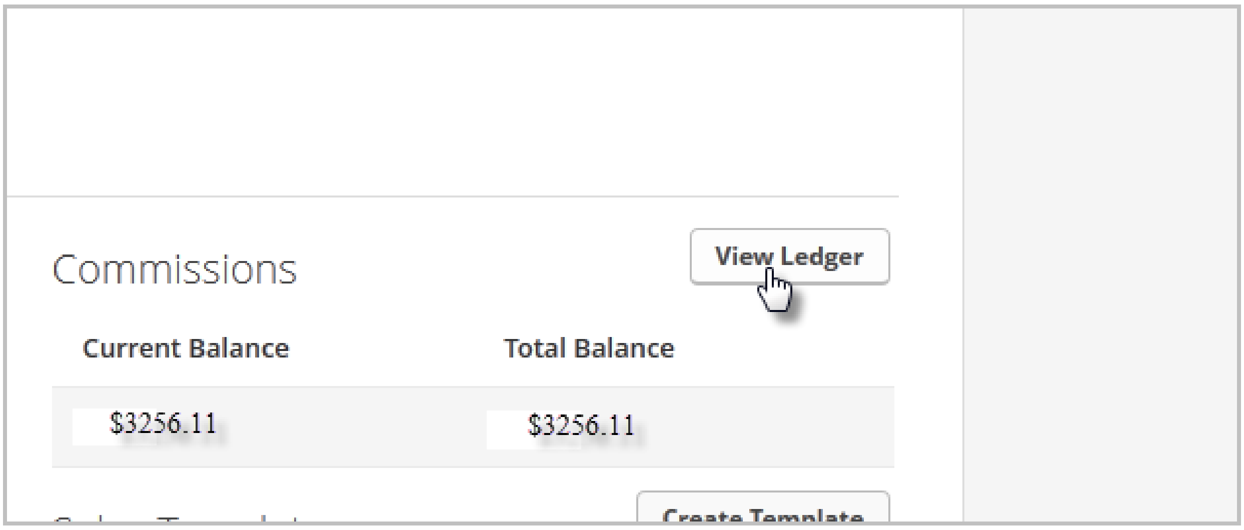
4. Go to the *Commissions* section. Note the *Current Balance* and *Total Balance*.
    - **Current Balance**: The current balance is the sum of the commission earned to date. It only includes commissions for paid in full sales. Claw-backs and past commission payments are already subtracted from this balance.
    - **Total Balance**: The total balance includes all commissions to date, including commissions for future payment plan billing. Claw-backs and past commission

payments are already subtracted from this balance as well.

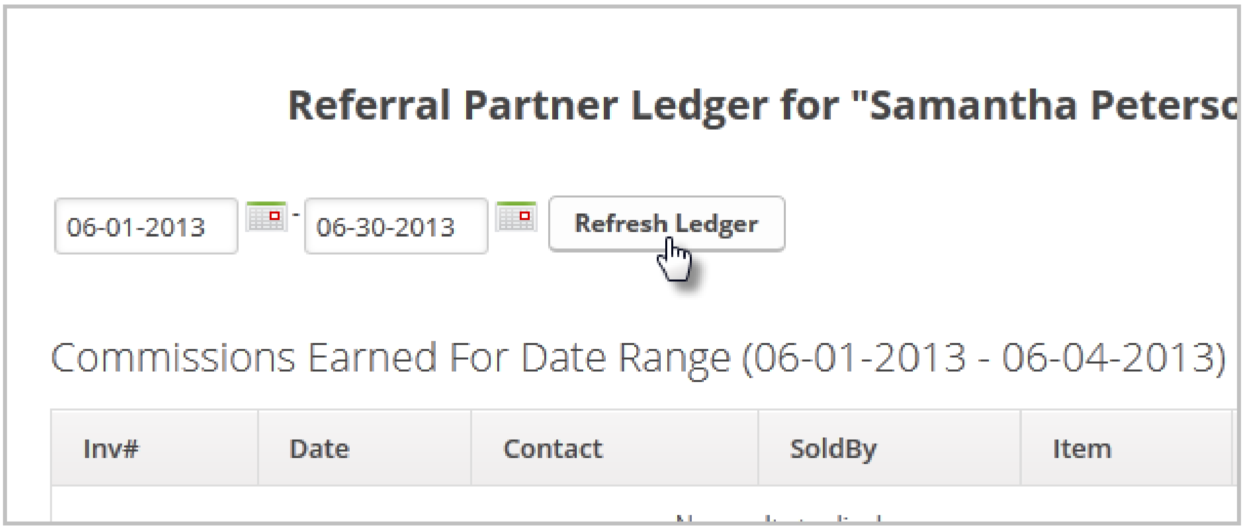
5. Note: These two balances will be different if the payout type for one or more of the referral partner's commission program is *Credit on Customer Payment*. The balances will be the same when the payout type for all of the partner's commission program is *Up-Front Credit in Full*.

   For Example: You receive an order for a $100 product. You pay the referral partner who sent you the customer a 10% commission on this product. The total commission for this order is $10.
   - If there is no payment plan associated with the product OR if the payout type is "Up-Front Credit in Full" then the Current Balance and the Total Balance are both $10. The referral partner receives credit for the full commission.
   - If there is a 5 installment payment plan associated with the order AND the payout type is "Credit on Customer Payment" then the Current Balance is $2 (the amount of commission earned from the first payment). However, the Total Balance is still $10. Each time the customer makes a payment, $2 is added to the Current Balance until the entire order is paid. Once the balance is paid in full, the referral partner will have received $10 in commission.

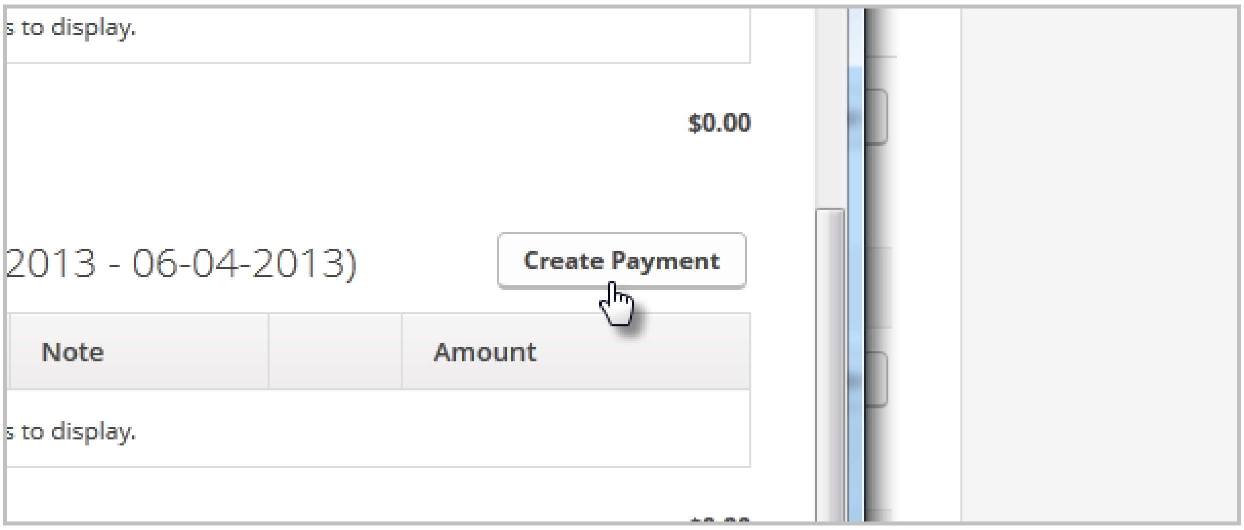
6. Click on the **View Ledger** button.



7. Enter a commission date range and click on **Refresh Ledger** to view a payment balance for that date range.



8. Click on the **Create Payment** button and enter the Payout Information.



- **Pay Type**: Select a pay type from the drop-down (e.g. check). This should represent the method you used to pay the referral partner.
- **Pay Date**: Enter the date the payment was issued.
- **Pay Amount**: Enter the payment amount. This may or may not match the commission earned for the date range you selected.
- **Pay Note**: Enter a note about the payment. This note will show up on the referral partner's ledger. Partners are able to view their ledger through the Referral Partner Center.

9. Click on the **Save** button. The payment will show up on the referral partner's ledger.

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Pay A Group Of Referral Partners At Once

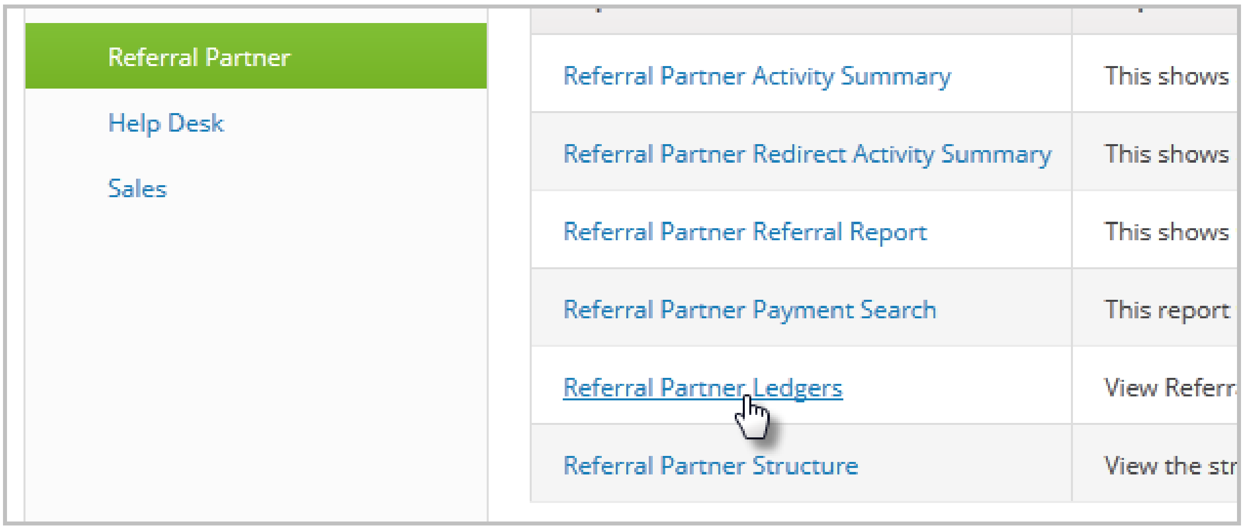
Last Modified on 08/02/2018 3:50 pm MST

Infusionsoft tracks partner referrals and calculates commissions due when a referral makes a purchase. You will need to issue payments to referral partners on whatever schedule you've defined in your partner contract. Issuing payments in Infusionsoft simply "zeros-out" the partner's balance, actual payments are made outside of Infusionsoft (i.e. check, PayPal, etc.)

If you issue commission payments to large groups of referral partners at the same time, you'll run a referral partner ledger report to find out how much you owe each referral partner.

1. Go to **CRM** > **Reports** in the main navigation menu

2. Click on the **Referral Partner Ledgers** link to open the report

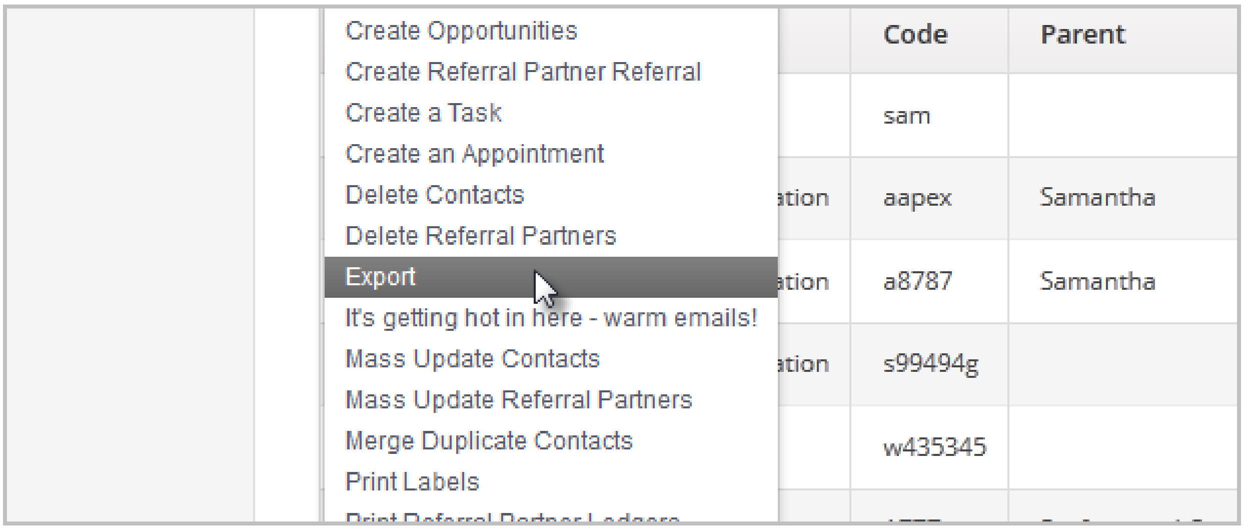


3. Enter the search criteria for the report (e.g. date range) and click the search button to see your results

4. (Optional) Click on **Ledger** to view individual affiliate ledgers.

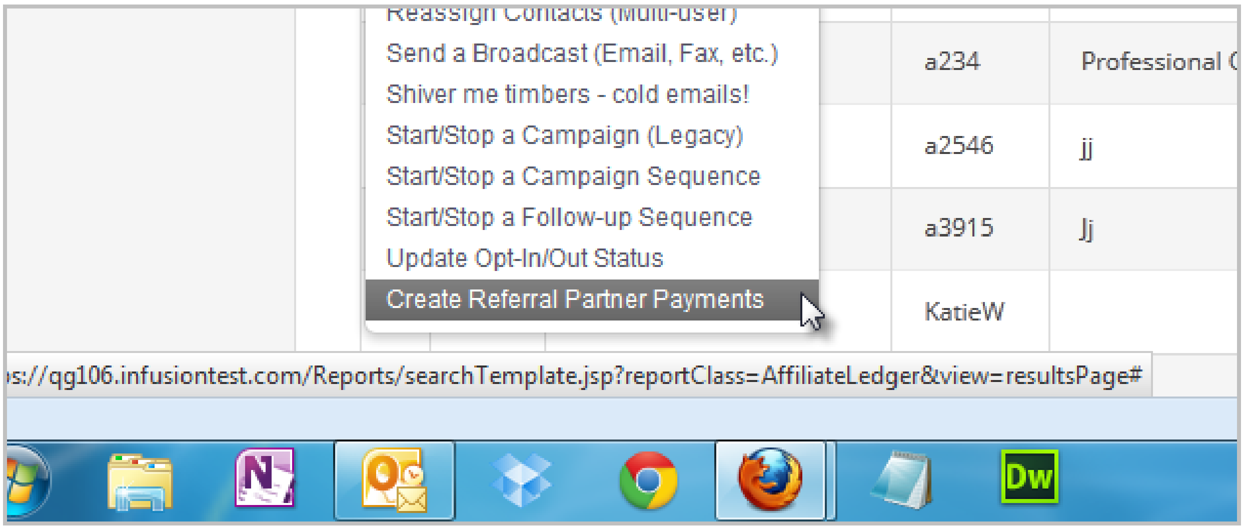
5. Click on the **Actions** drop-down and select **Export** to create a .csv file of this report.

   You can upload this file to another system or use it to issue checks. Note: There is also an option to **Print Referral Partner Ledgers** if you want to include a copy of the ledger with your payment.



6. Once you have paid your affiliates, you need to record the payments in Infusionsoft.

7. Find the same report you used to export the affiliate balances and Click on the **Actions** drop-down and select **Create Referral Partner Payments**.

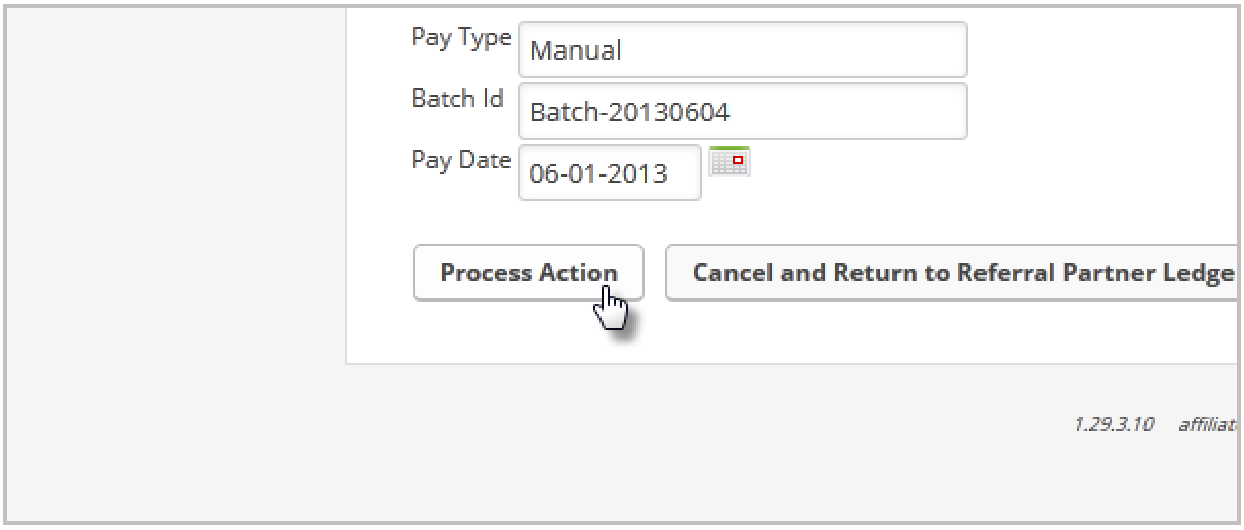


8. Choose the method you used to calculate the payment amount.
   Note: The same recording method will be used for ALL of the affiliates on the ledger report.
   - **Commission earned for the date range**: This method applies a payment amount equal to the commission earned within the date range on the report. This is displayed in the commissions column on the ledger report.
   - **Beginning balance plus commission earned for date range**: This method adds the beginning balance amount and the commission earned together within the date range on the report. The beginning balance may be a positive or negative value. A negative value is the result of customer returns that involve commission

clawbacks.
  - **Ending balance**: This method records a payment amount equal to the value in the ending balance column on the report. The ending balance is calculated by adding the beginning balance and commissions together, then subtracting any payments issued within the date range.

9. Review the payment type, batch ID, and date.
   This information is generated by the system, but you can change it. The batch ID is a date code (e.g. Batch-20150624 = June 24, 2015.)

10. Click on the **Process Action** button to apply the payments.



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Infusionsoft Mobile

Last Modified on 08/29/2018 1:39 pm MST

Infusionsoft Mobile allows you to manage and communicate to your contacts directly from your mobile device. Also, by leveraging tag goals, you can automate follow-up by tagging a contact. Infusionsoft Mobile currently offers the best experience on iOS and Android smartphones. Infusionsoft Mobile is available in the following countries: Australia, Canada, Ireland, Mexico, New Zealand, South Africa, United Kingdom, and the United States.

Install and Sign in

Download and Install Infusionsoft Mobile for iOS and Android. Download Infusionsoft Mobile from the Apple Store if you are using an iOS device, or from the Google Play store if you are using an Android device. You can also download the app from the Infusionsoft Marketplace .

1. Sign-in with your Infusionsoft ID. After you have installed Infusionsoft Mobile, open it and sign in to your account using your Infusionsoft ID.
2. After logging in, you will see an empty "Recents" screen; from here, you can sign out, access help, search for contacts, or add new contacts.

Find a Contact

Tap the **Search** icon to find a contact in your Infusionsoft account. You can search by First Name, Last Name, Email Address, or Phone Number. Simply begin typing the information in the search bar and the app returns a list matching your criteria.

Add a Contact

Tap the plus icon to create a new contact. You can add the following fields to the contact:

- First Name
- Last Name
- Company
- Job Title

- Phone (5 phone fields with the label options of mobile, work, home, other)
- Email (3 emails - the user must check the permission to market checkbox for each one If they would like to send automated communication to that email)
- Billing Address
- Shipping Address
- Person Notes

View and edit a contact

1. While viewing a contact, tap the pencil icon to edit.
2. Click the check-box to save your changes.

Pro-Tips!

- You can "long press" any of the fields to copy them.
- The "Person Notes" on the contact are not the "Contact Notes" in Infusionsoft; they are the "Person Notes" two tabs over on the contact record that exist in a large text box you append notes to.
- You can view the shipping and billing address for a contact but not the "other address."
- Once you view a contact, the information is cached on the phone. So if you don't have a network connection, you can still view contacts you've looked at previously. The data will be as recent as the last time you viewed that contact.

Call or text a contact

You can call a contact by tapping the phone field or tapping the phone icon. To text, simply tap the text icon.

iOS Pro Tips!

- On an iOS device, after you end a call with a contact, you will be viewing the Address Book and will need to re-open the Infusionsoft Mobile app.
- On an iOS device, you will not see previous text conversations with a contact when you are texting them; you will only see a compose sheet. If you wish to see a conversation thread, you must open the native iOS texting app to do so.
- Texting will not work on iPods or iPads with our app. This is due to a bug in Apple's code that prevents the feature from working with our code. Apple is aware of this but has not yet released a fix for it.

Email a contact

When you tap the email icon or anywhere on the email field, the native email app is opened with the contact's email address in the "To" field. When you tap "Send" or "Cancel", you are directed back to the contact record.

Map a contact's location

Tap an address field or the map icon to get directions to those addresses. Once you tap either the icon or the field itself, your phone's native maps app is opened with the point plotted on the map. You can cancel to go back to the contact record or proceed to get directions using your native map app.

Pro Tips!

- Once you tap to get directions, you leave the Infusionsoft app and enter your phone's native maps app. Once the route is complete, or you cancel early, you can navigate back to the contact record in the Infusionsoft Mobile app.
- In iOS, you can "long press" on the directions field and either "Copy" or "Open in Google Maps."

Apply and view tags

1. Tags are shown at the bottom of the contact record 5 at a time. You can swipe to the left to view more. If you have more than 45 tags, you will see a link that says "more."
2. Tap the space bar to view a list of all tags, or start typing the name of an existing tag to find it.
3. You can create a new tag by scrolling to the bottom of your list of tags and tapping on the Create & Apply button.

Pro Tips!

- When you navigate to the "more" link (if you have more than 45 tags for that contact), we can only show up to a thousand tags at a time.
- On the contact, Tags are organized from most recently applied.

Save a contact to your phone's address book

You can tap Save to Phone at the bottom of the contact record to save a contact to your phone's address book.

Android Tip! Android will only allow 1 address and 3 of the 5 phone fields to be saved to the device.

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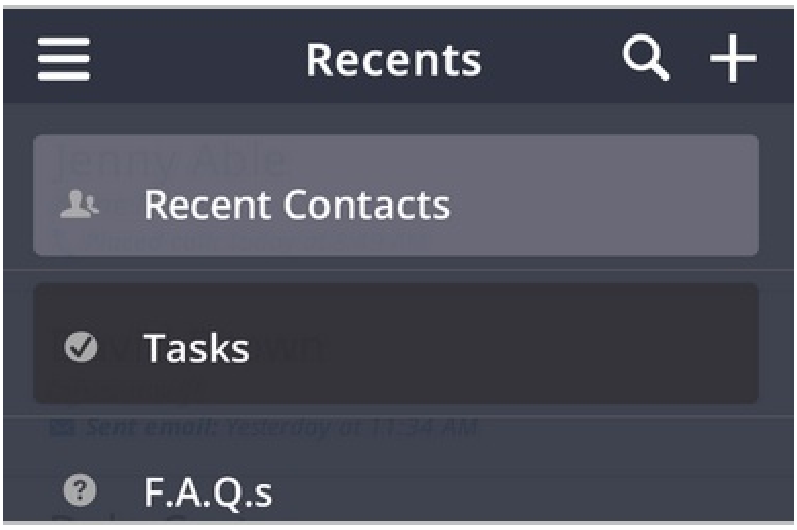
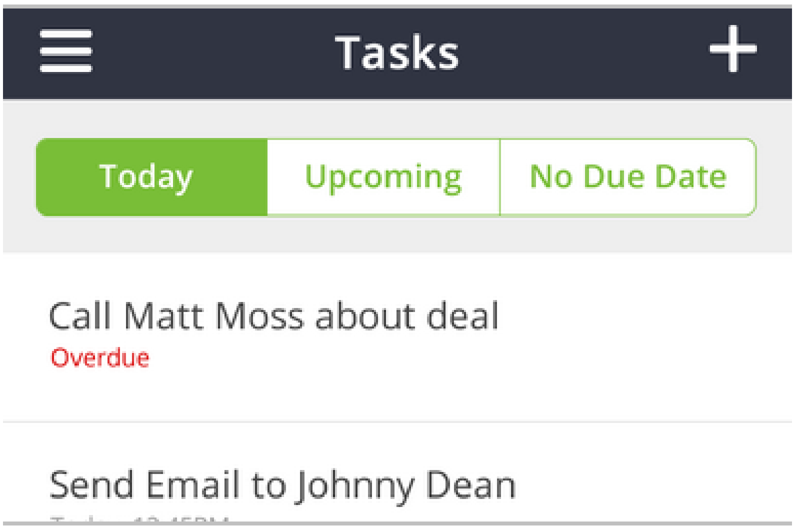
Infusionsoft Mobile Tasks

Last Modified on 08/02/2018 3:53 pm MST

1. Expand the menu and tap **Tasks**



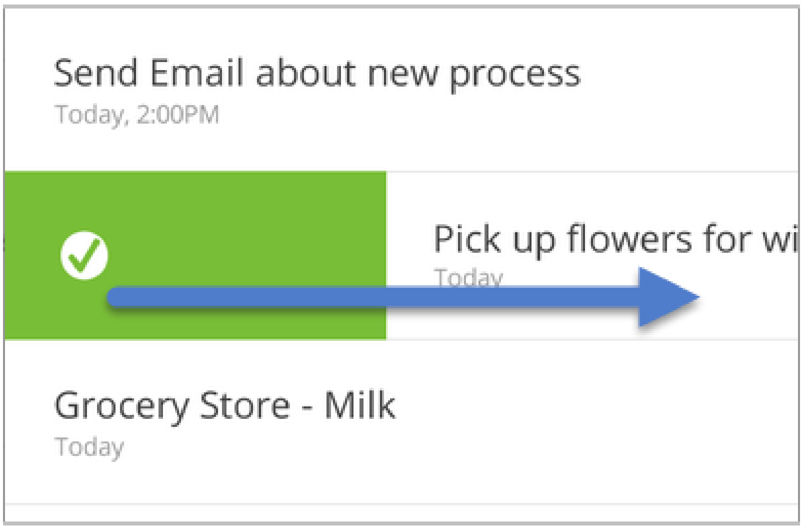
2. Click on a task to view the Task List screen.



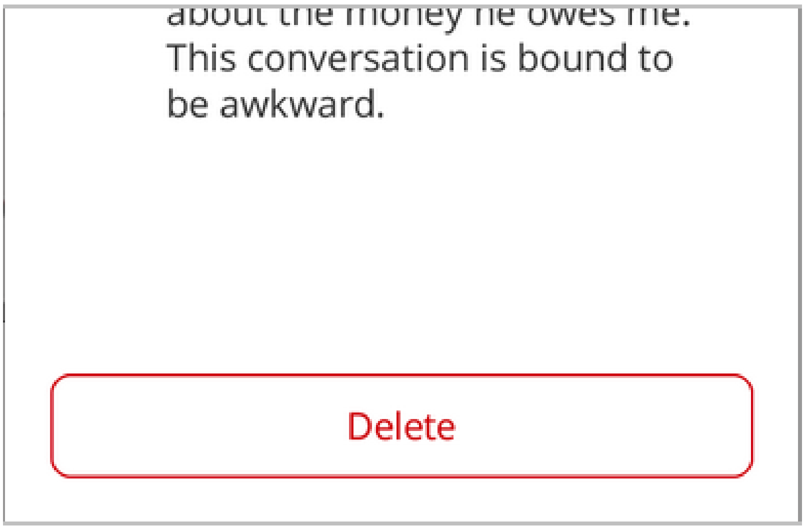
   - **Today** contains overdue tasks and tasks due today.
   - **Upcoming** contains tasks with due dates in the future.
   - **No Due Date** contains tasks with no due date.

3. To complete a task, swipe from left to right while on the List screen. You will be prompted to **Undo** if you swiped the task erroneously. Note: Once a task is complete,

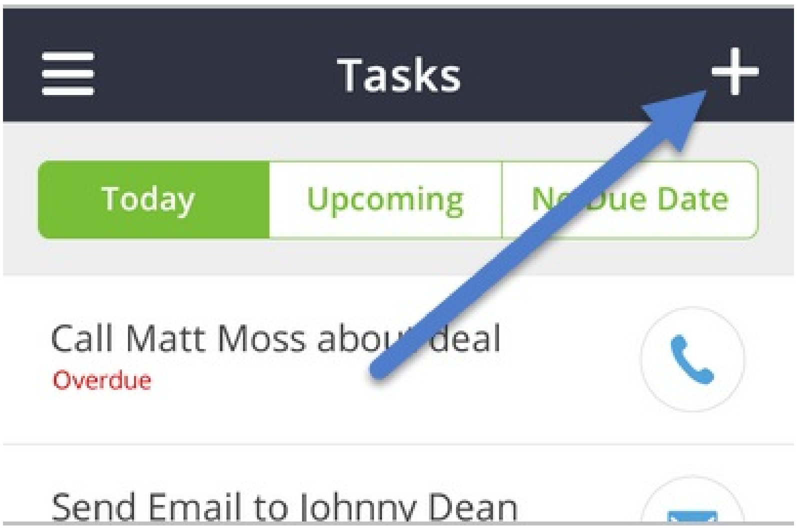
any campaign automation tied to that task will trigger at this time.



4. To delete a task, tap the task to see the details, and tap the **Delete** button.



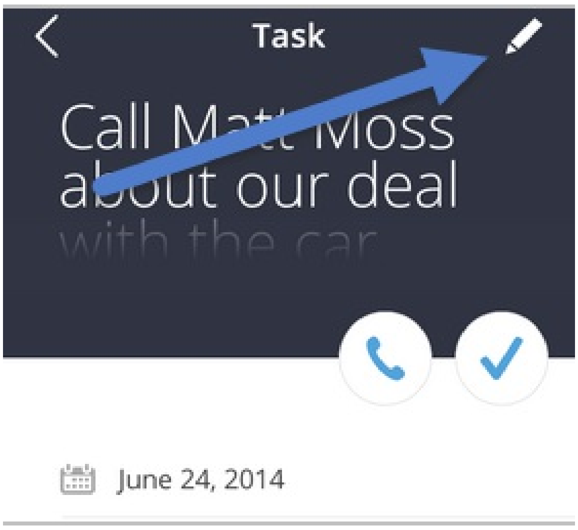
5. To add a task, tap the "plus" icon in the Task List view



As you start adding task details, more task options will become available:

- You can tap due date to select a date from the native date picker that slides up.
- You can tap "Add Contact" to search for a contact and select one to associate to that task.
- You can tap the **Description** field to start entering text in that field. The whole screen scrolls up as the body of text text lengthens.
- When you tap Save, the task is added to the appropriate list based on due date and you can see a "Task successfully created" card at the bottom of the screen.

6. To edit a task, you can tap the edit "pencil", or on any of the fields while viewing the task



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Infusionsoft Mobile Payments IOS

Last Modified on 08/02/2018 3:54 pm MST

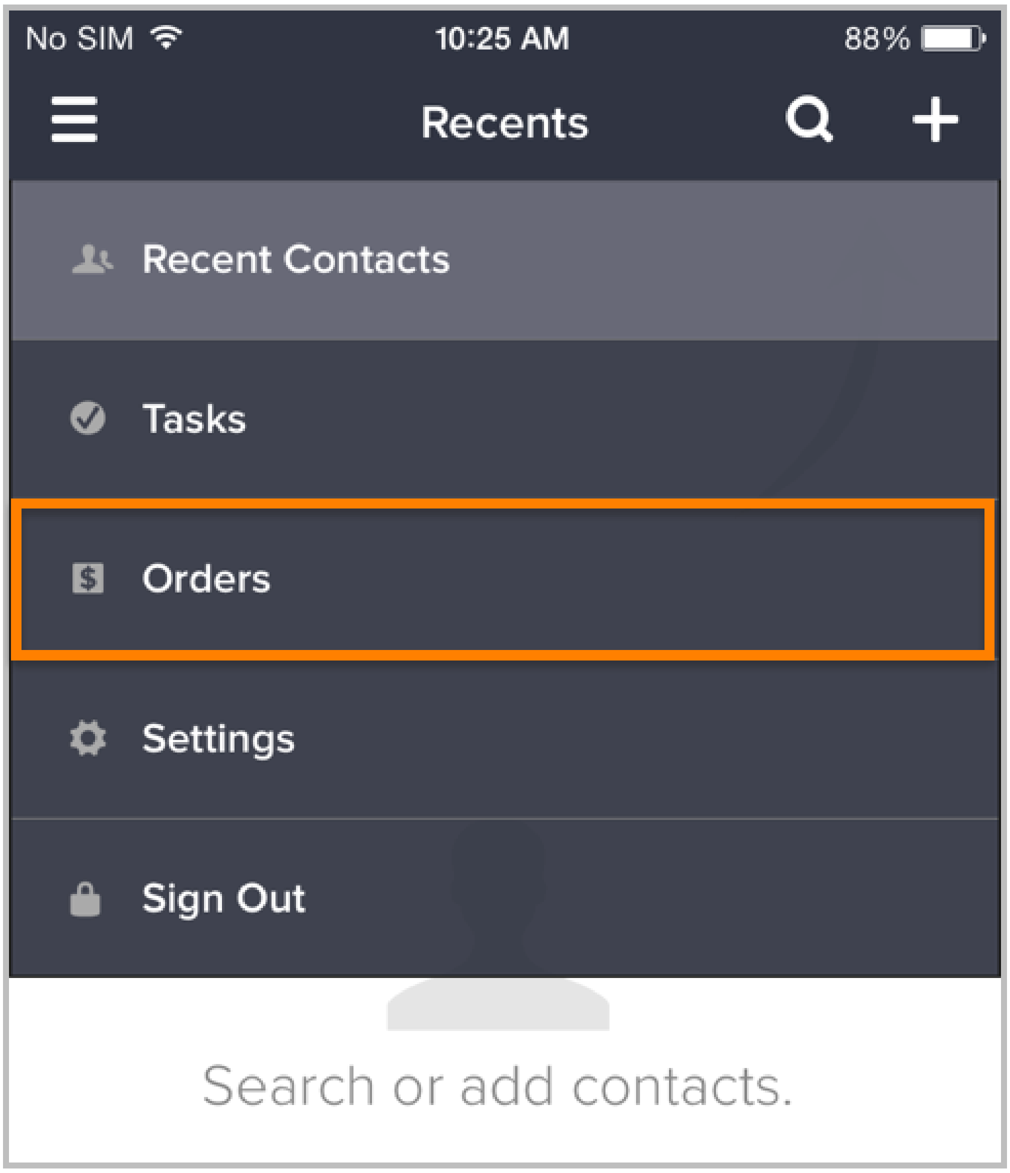
An Active **US Infusionsoft Payments** account is required to use the Infusionsoft Mobile Payments feature.

Learn how to view, create, and collect payments for orders on your mobile device with Infusionsoft Mobile.

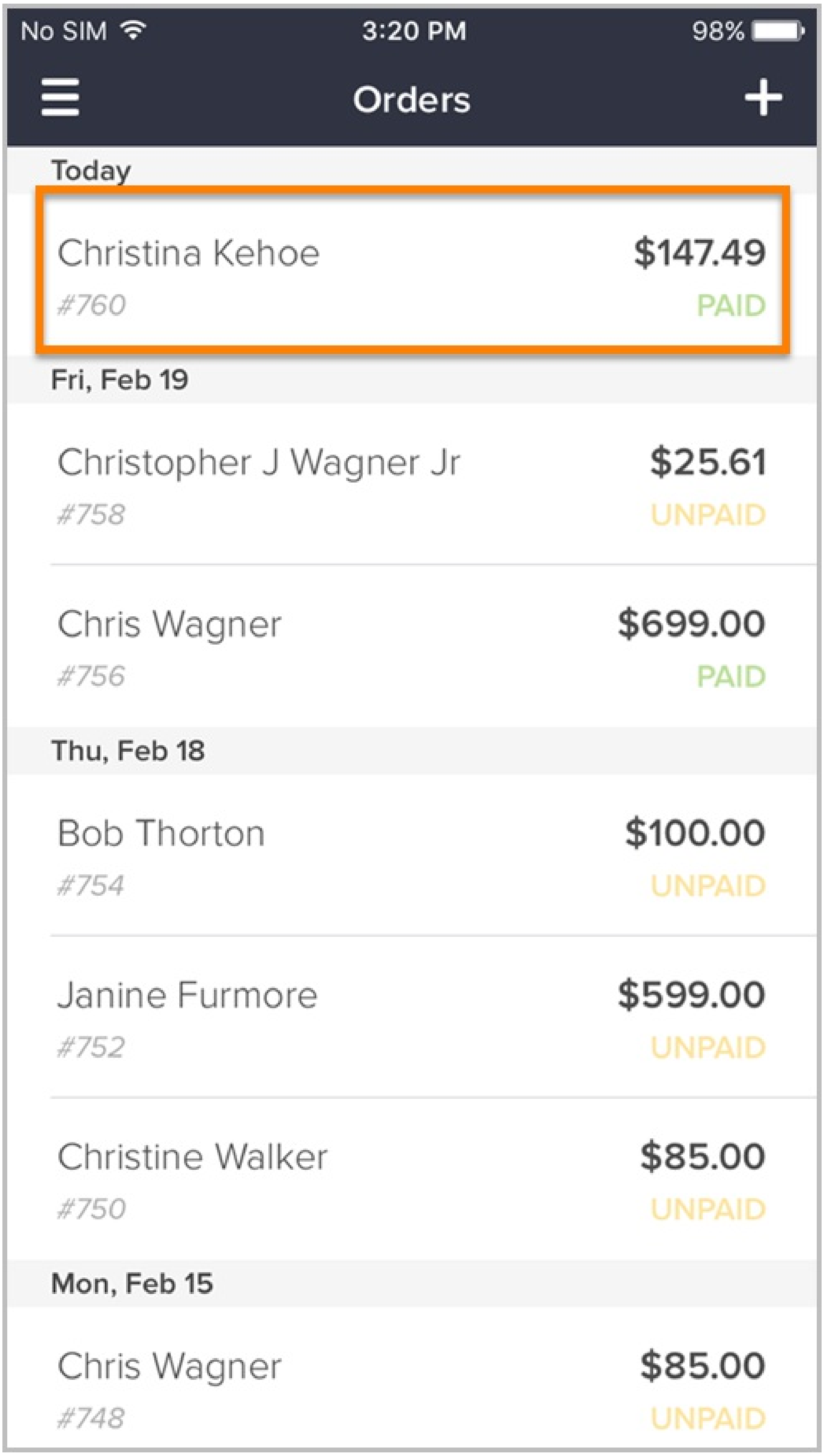
For information on connecting your Infusionsoft Payments Mobile Card Reader, please see This Article .

Known Issue: If you attempt to process a payment for a contact with no email in its Email 1 field through the Recent Orders Screen, the contact may not receive a receipt email when the payment is processed. This is true even if the contact has data in its Email 2 or Email 3 fields. **Workaround:** Always complete a contact's Email 1 field before processing payments.

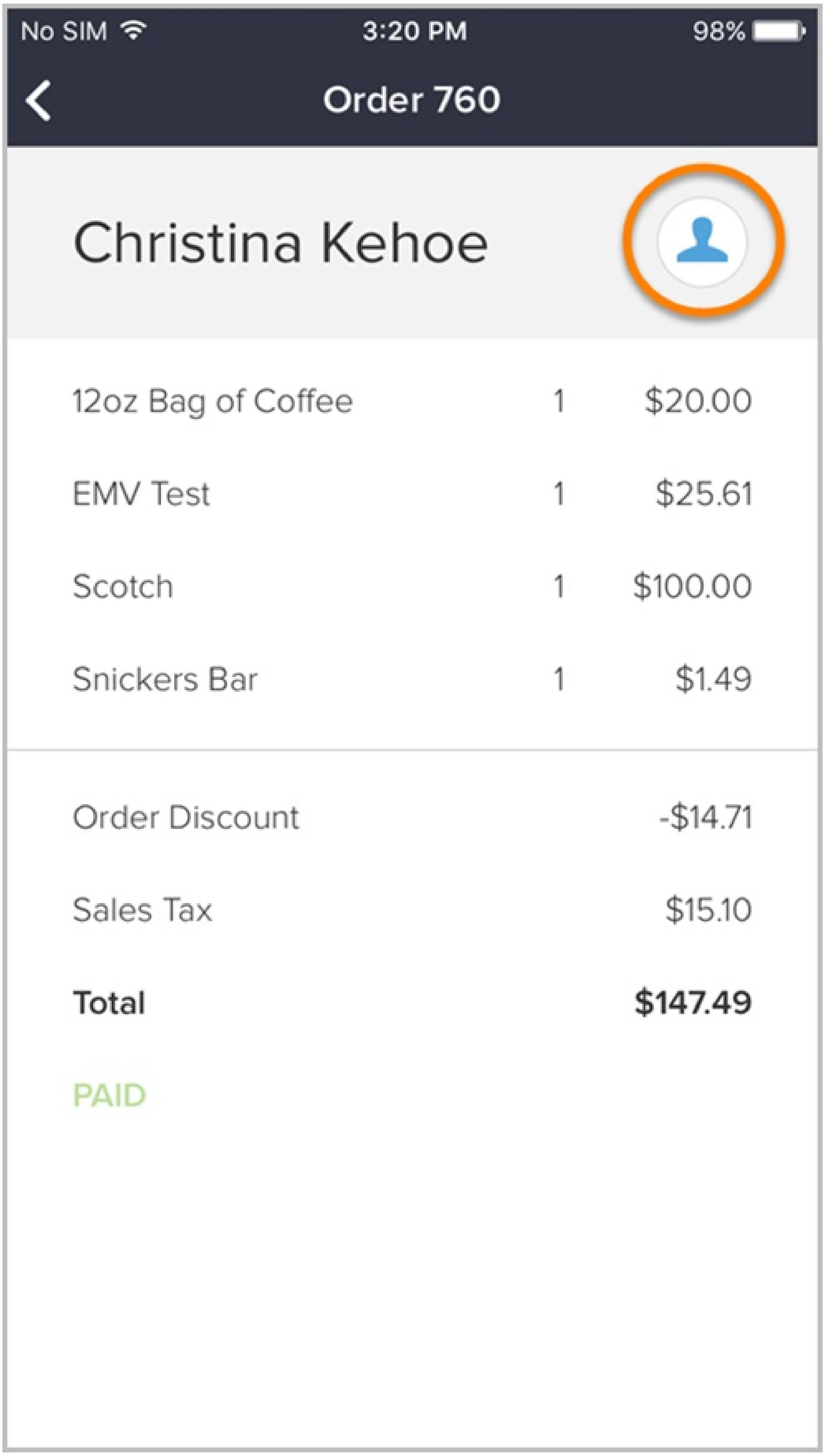
1. Expand the menu and tap **Orders**



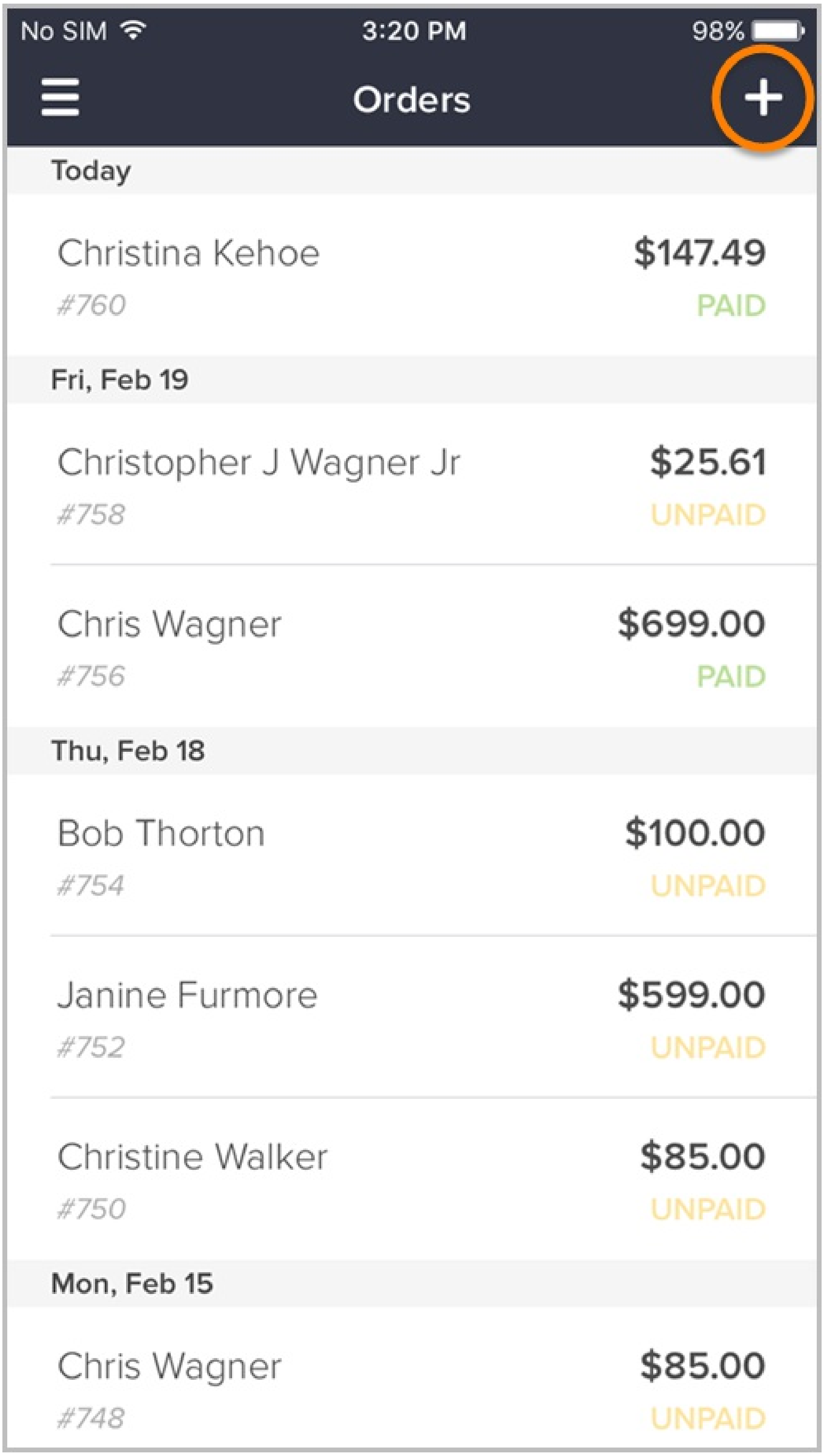
2. Tap on an order to view the order details and payment status



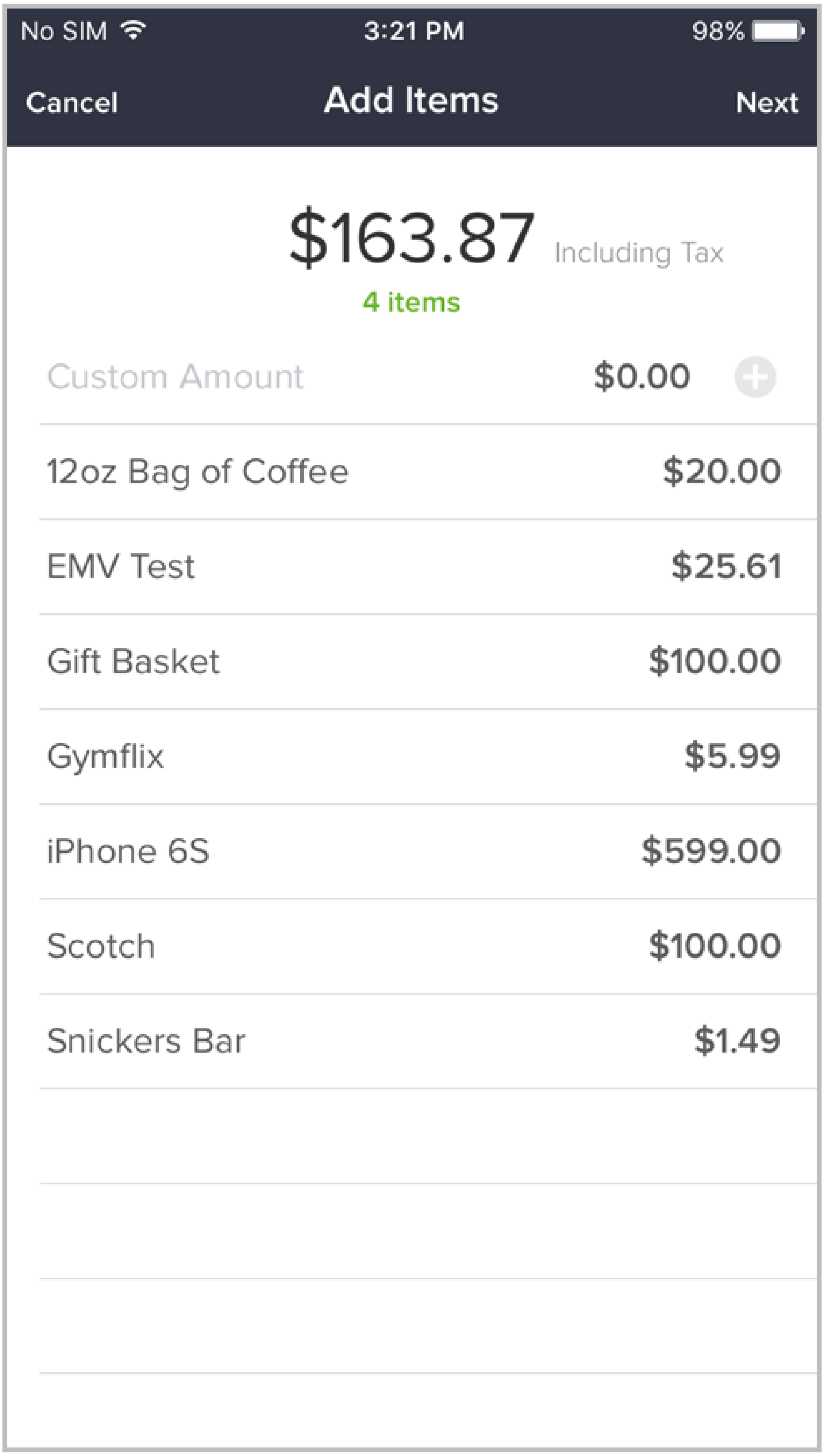
3. Tap on the person icon to open the contact record attached to the order. Tapping an item on this screen will expand the description.



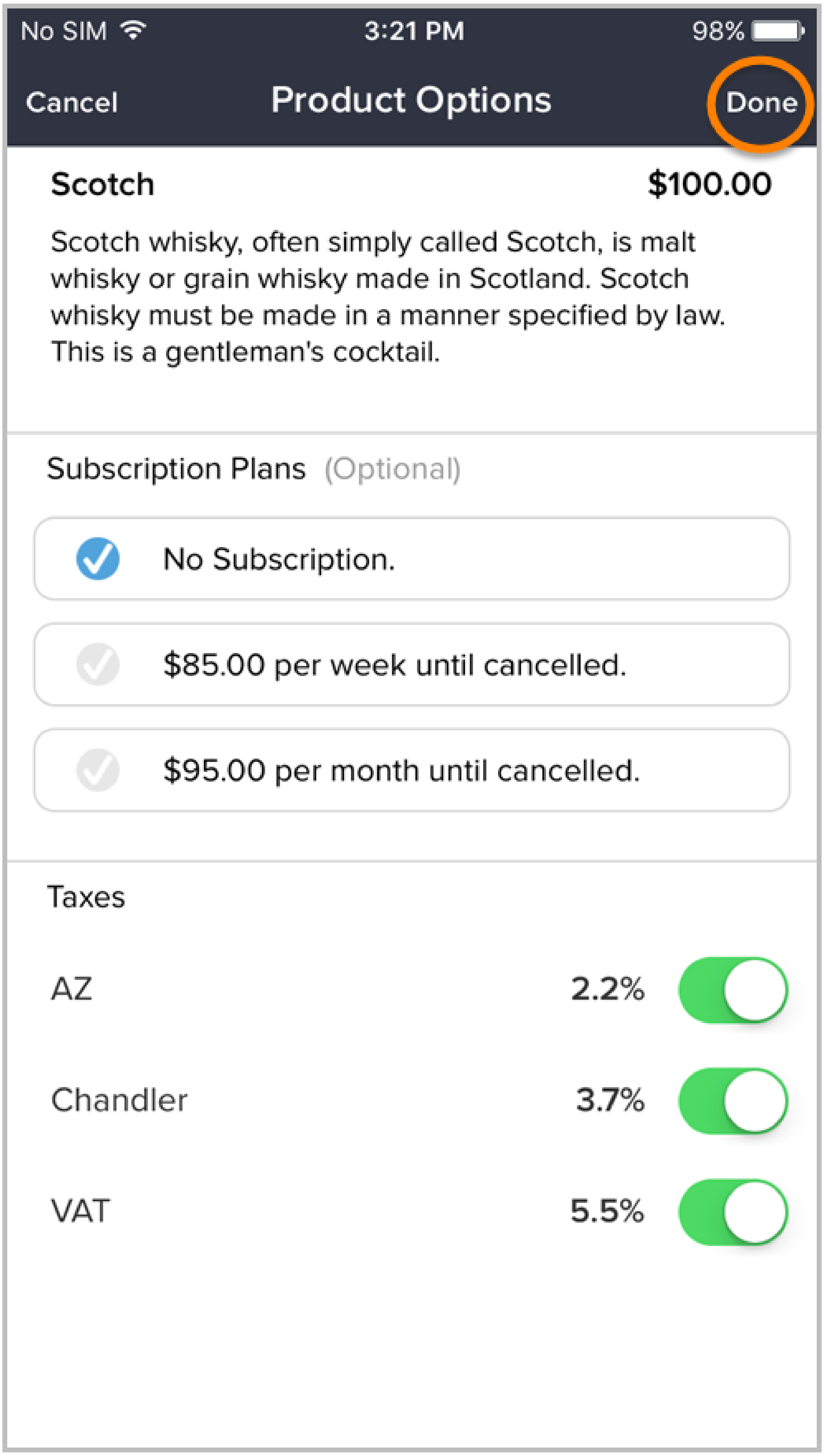
4. To create an order, tap **+** in the Order List view.



5. From your product list, tap the items you would like to add to the order. Items will be automatically added to the cart and the total will be calculated at the top. You can add a custom product and amount by tapping the plus button at the top.

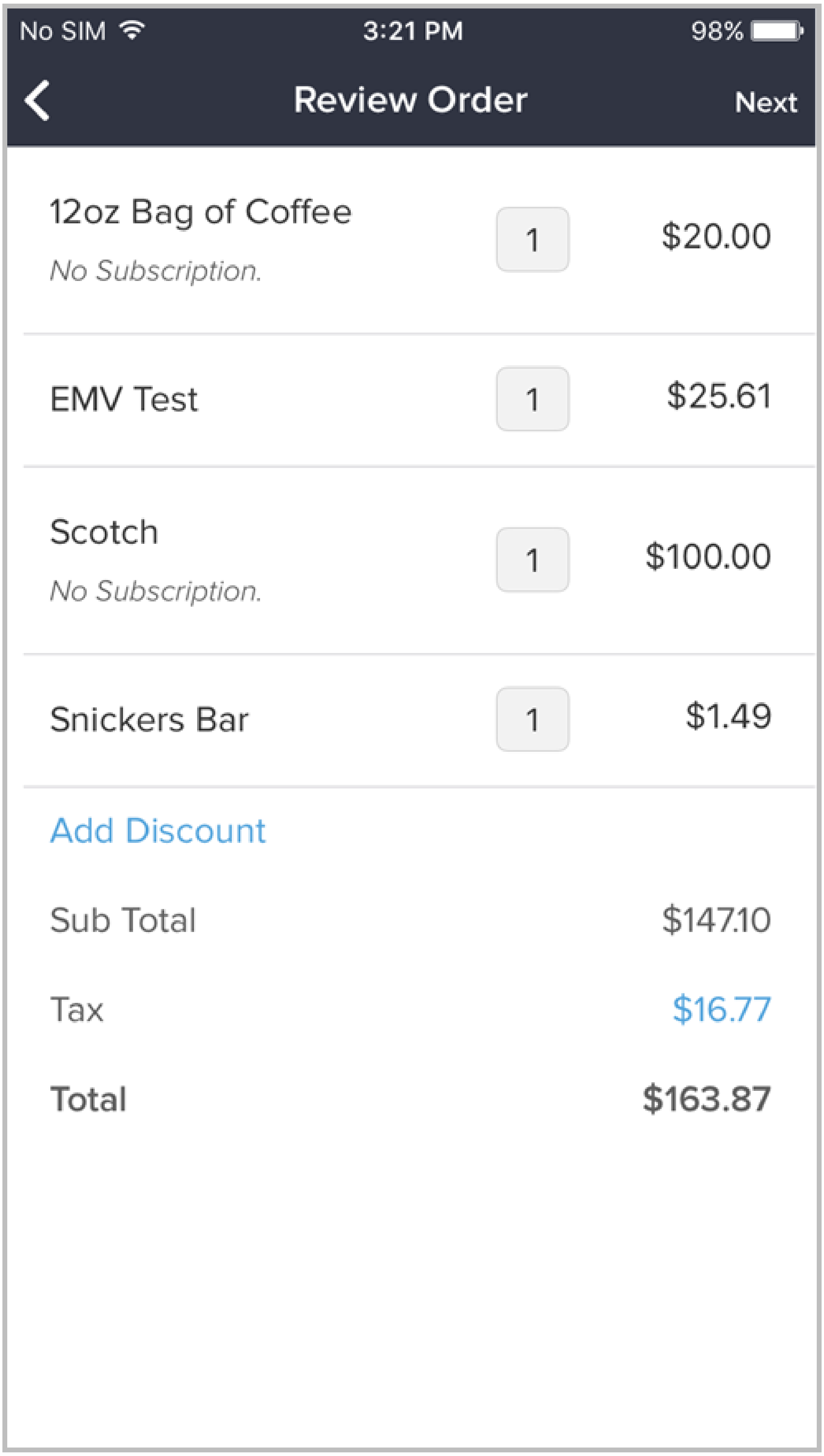


6. When you select an item with product options, fill in the required options (such as subscription plan or size) then tap **Done** to add it to your cart.

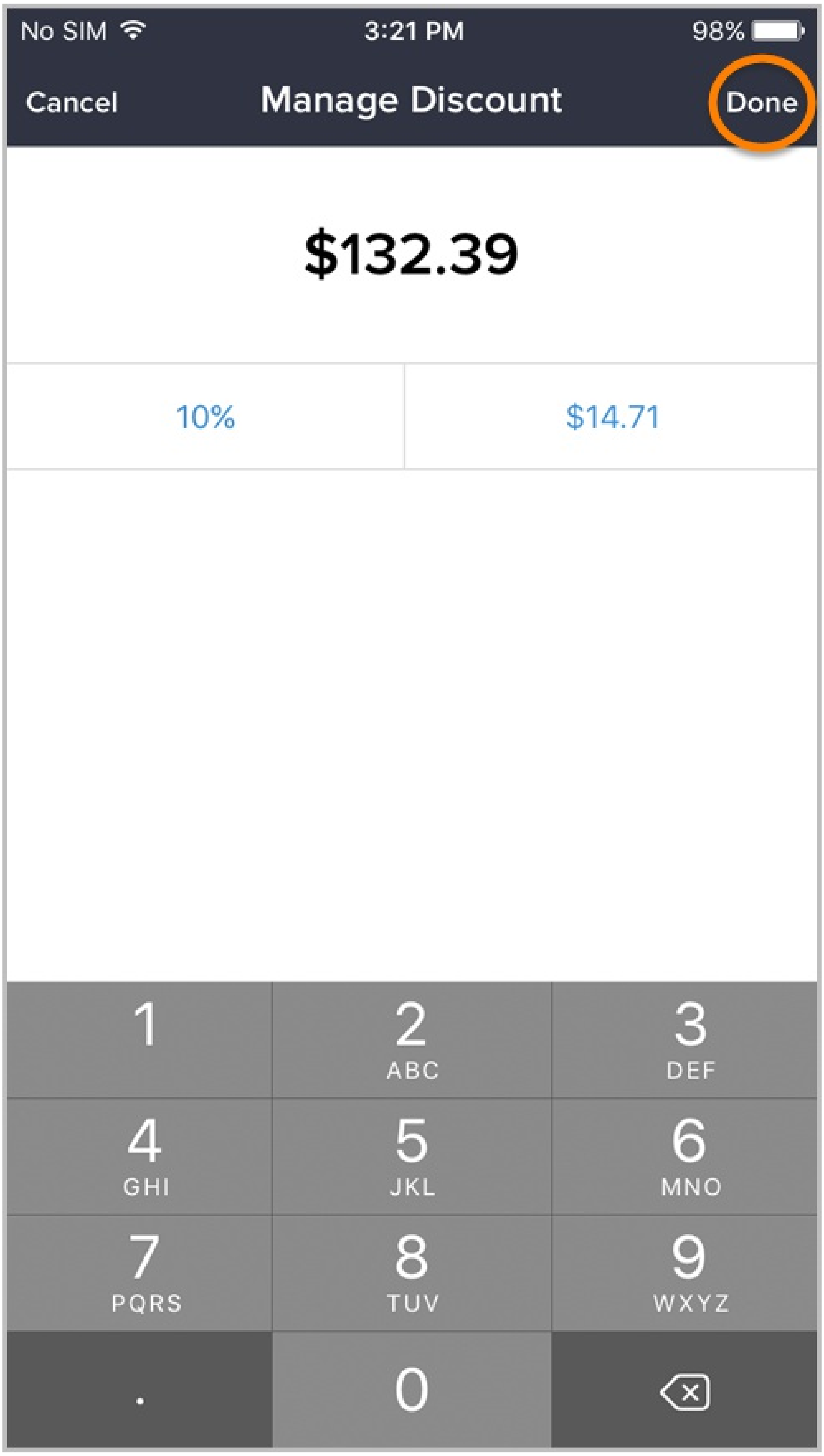


7. On the review order screen, you can view the order items, details and total.
    - You can tap the quantity field to change the quantity of a particular item.

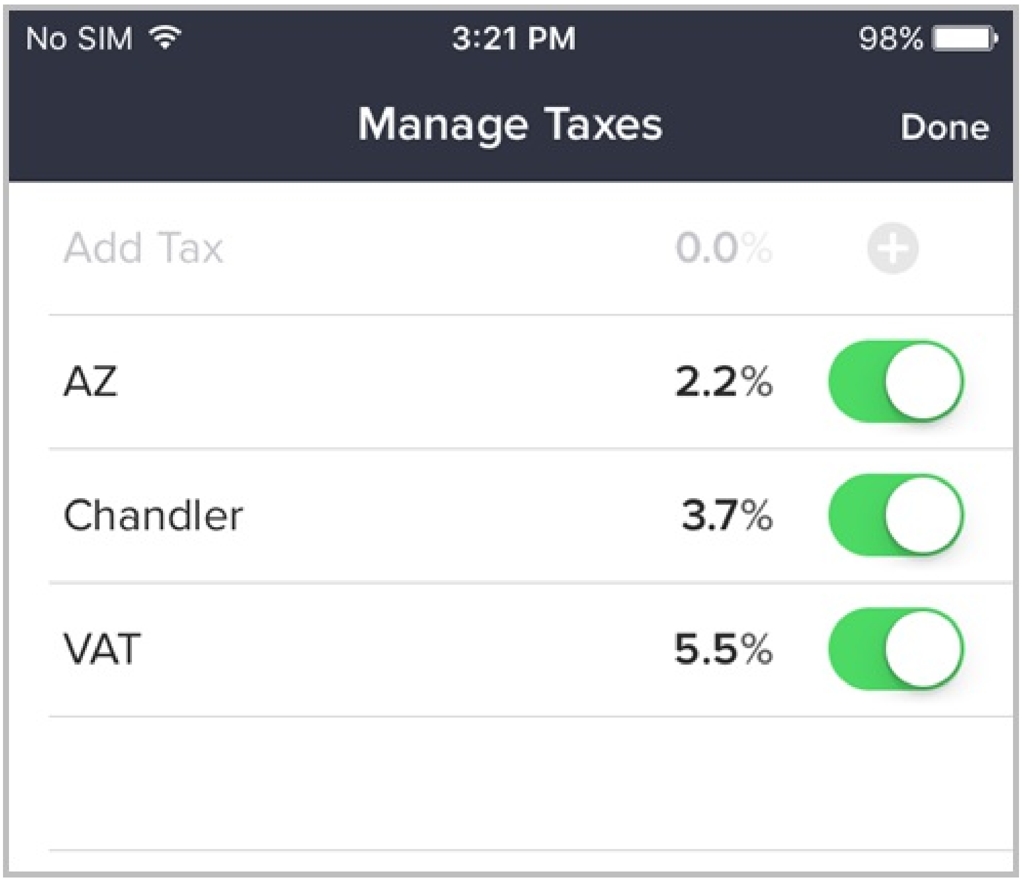
- You can slide from right to left to delete an item in your order.
- You can tap an Item to view and change its Product Options (if it has options.)
- You can tap **Add Discount** to enter in a discount for the order.
- You can tap the Tax field to create and add a tax percentage to the order.
- Tap the **Next** button to start the payment process.



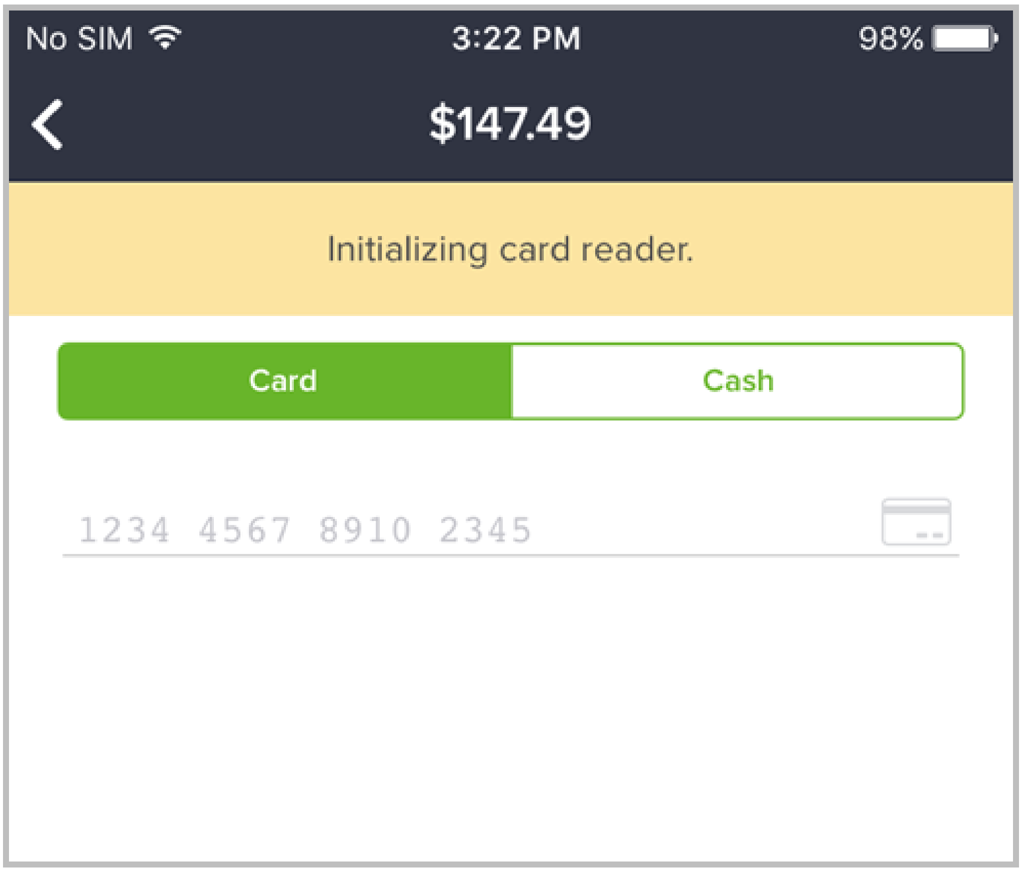
8. To add a discount to your order, fill in either a percentage or dollar amount and click **Done**.



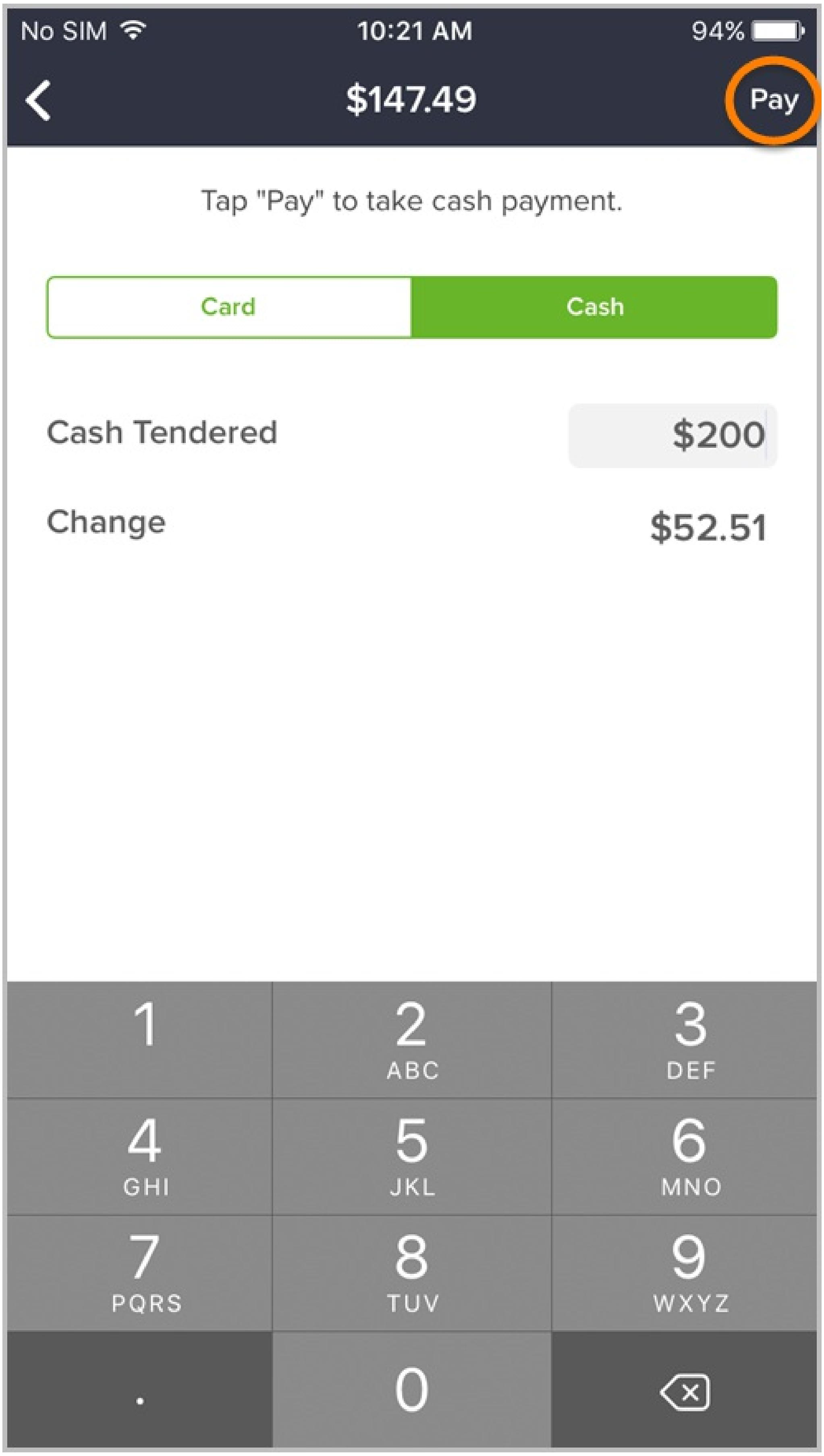
9. To add tax to your order, toggle a previously set tax by tapping the switch. To add a new tax, fill in the top field with a label and percentage then tap the **+** button. Tap **Done** to add it to your order.



10. After reviewing your order, tap a payment method to begin either the Card or Cash process.

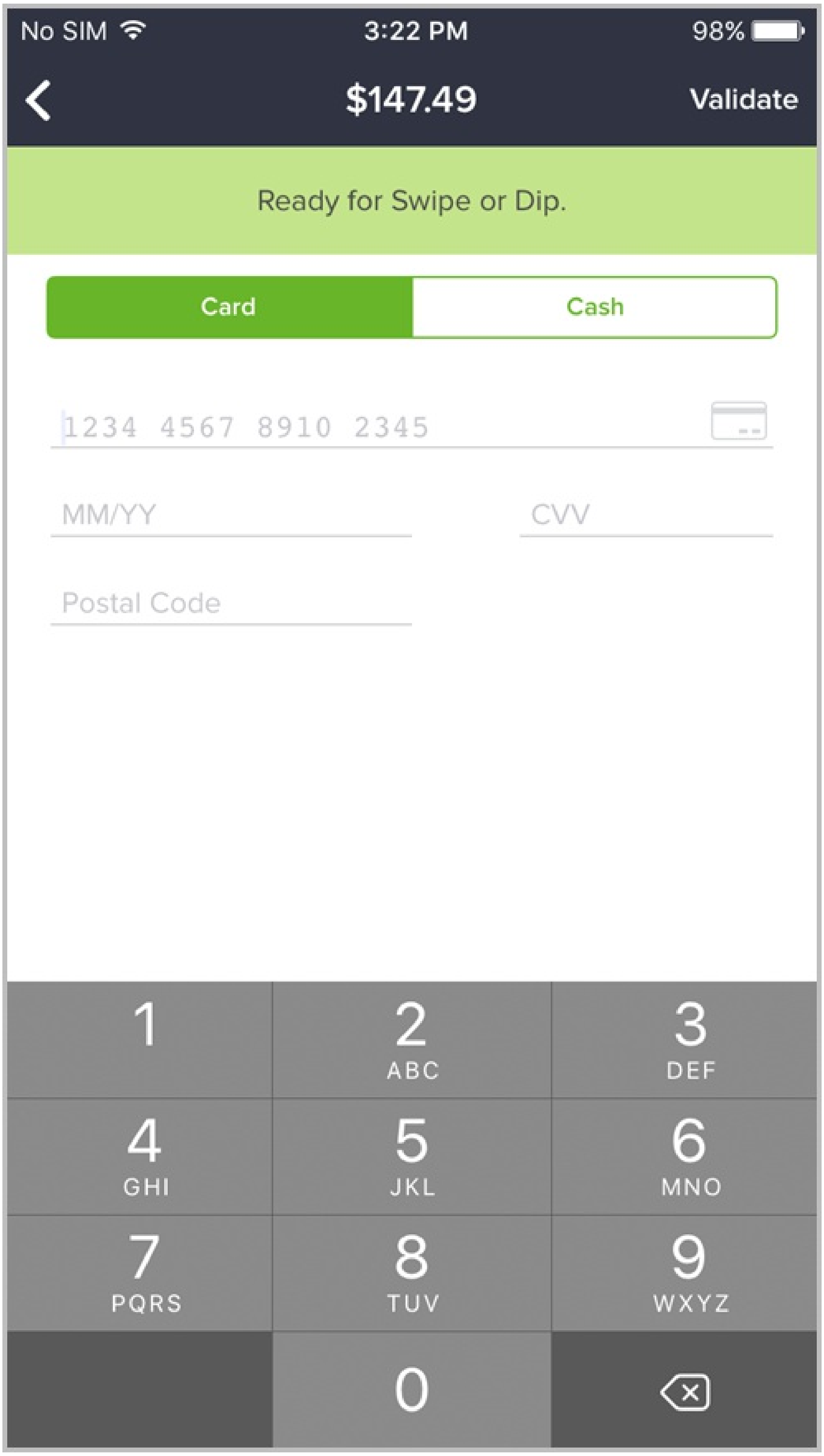


11. If the customer is paying with Cash, enter the amount tendered to automatically calculate the amount of change to be given. Tap Pay to advance to the “Assign Contact” screen.



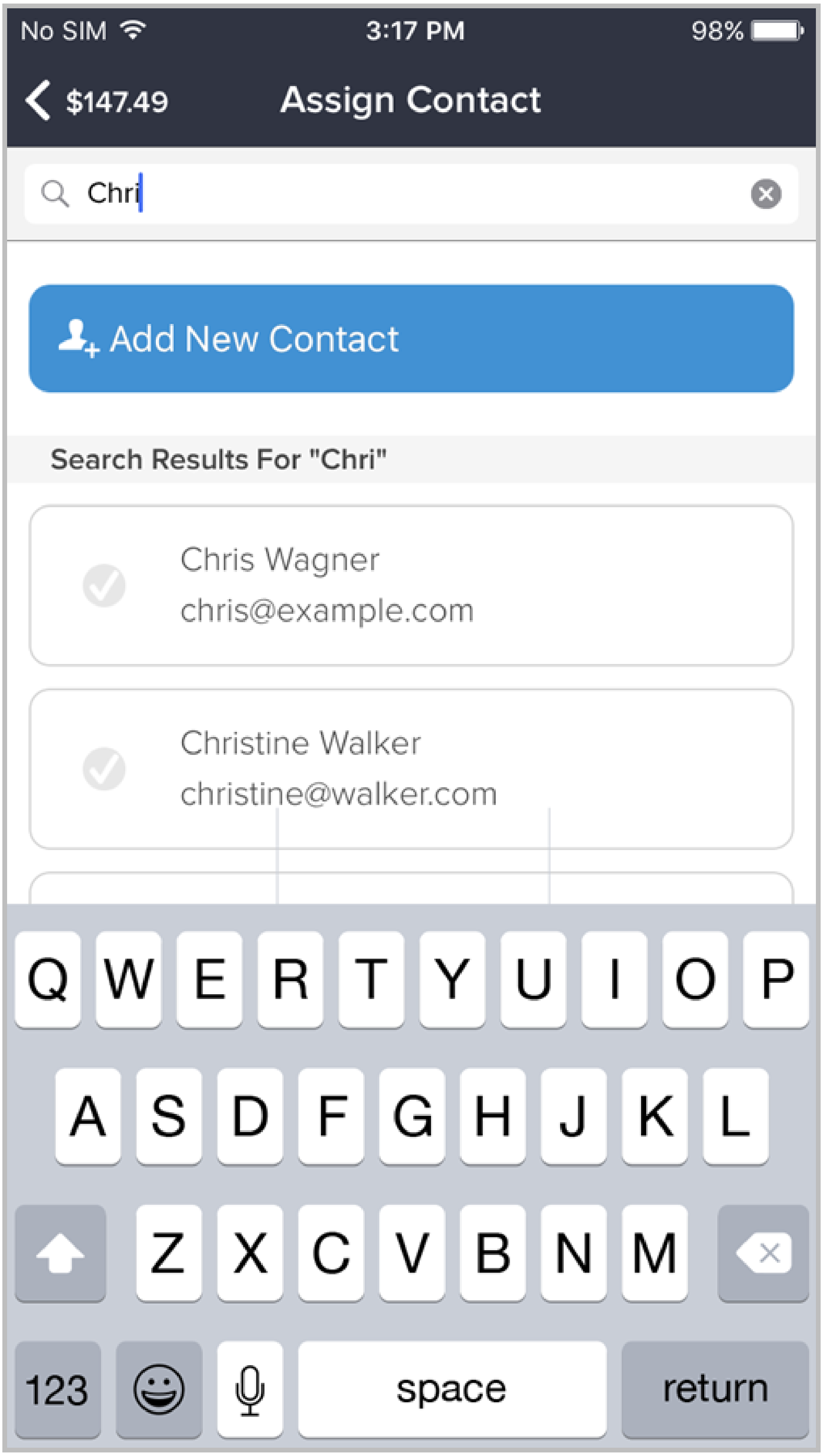
12. If the customer is paying with a credit card, you can choose to manually enter the card information into the required fields, or you can insert an Infusionsoft Payments card reader and insert the card when the screen indicates it is ready.

- When you see the “Ready for Swipe or Dip” screen, you can insert a card for payment.
- If an error occurs, you may need to reinsert, check your network connection, or use a different card.
- Wait for the card to tokenize. It will automatically advance to the Assign Contact screen once approved.



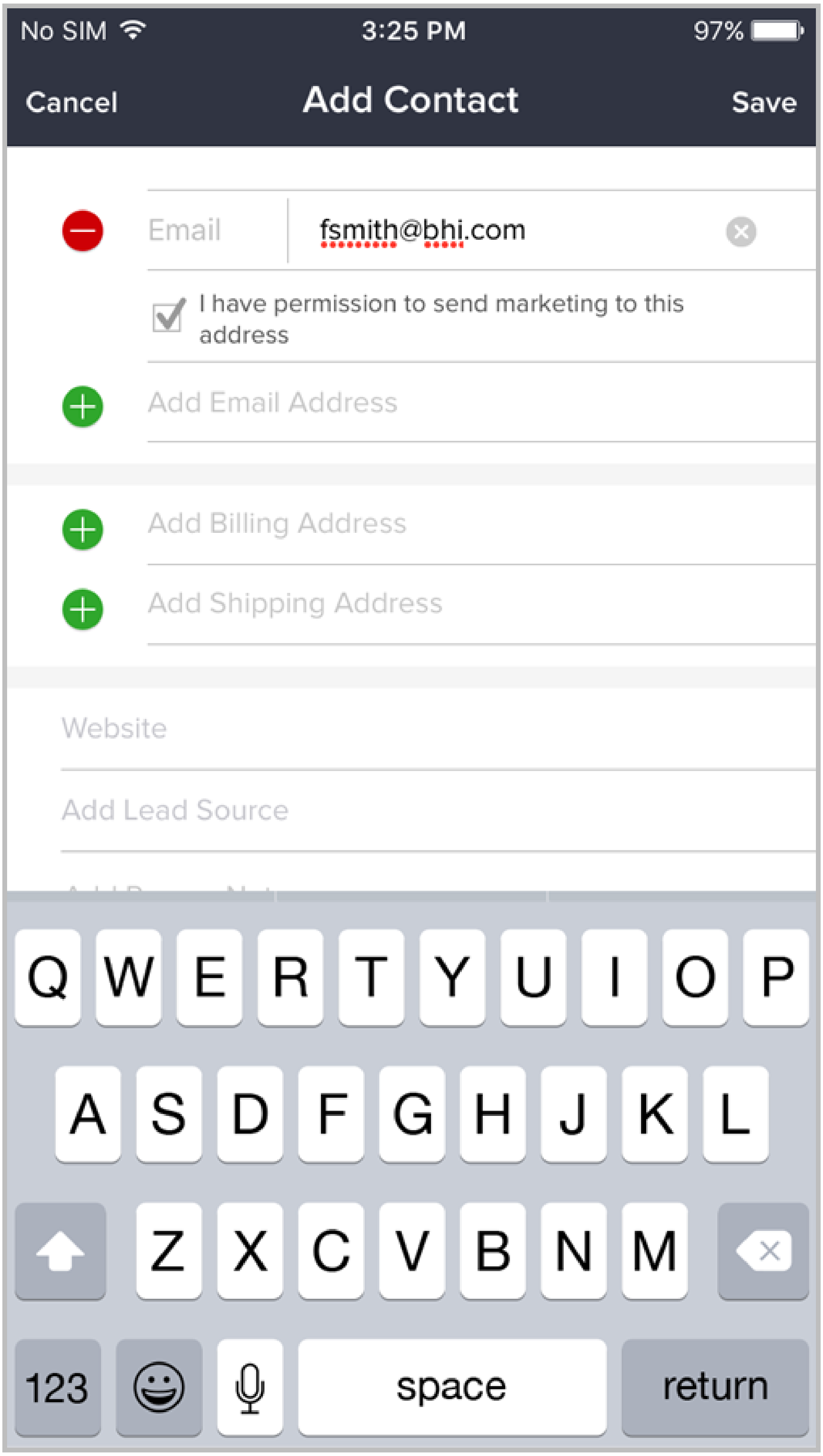
13. If the customer is already a contact, their name will appear under "Existing Contacts" on this screen.
    - You can add a new contact by tapping Add New Contact.

- You can tap Search Contacts to quickly find an existing contact.
- The contact being assigned must have an email address. You will be prompted to add an email to an existing contact if it does not already have one.

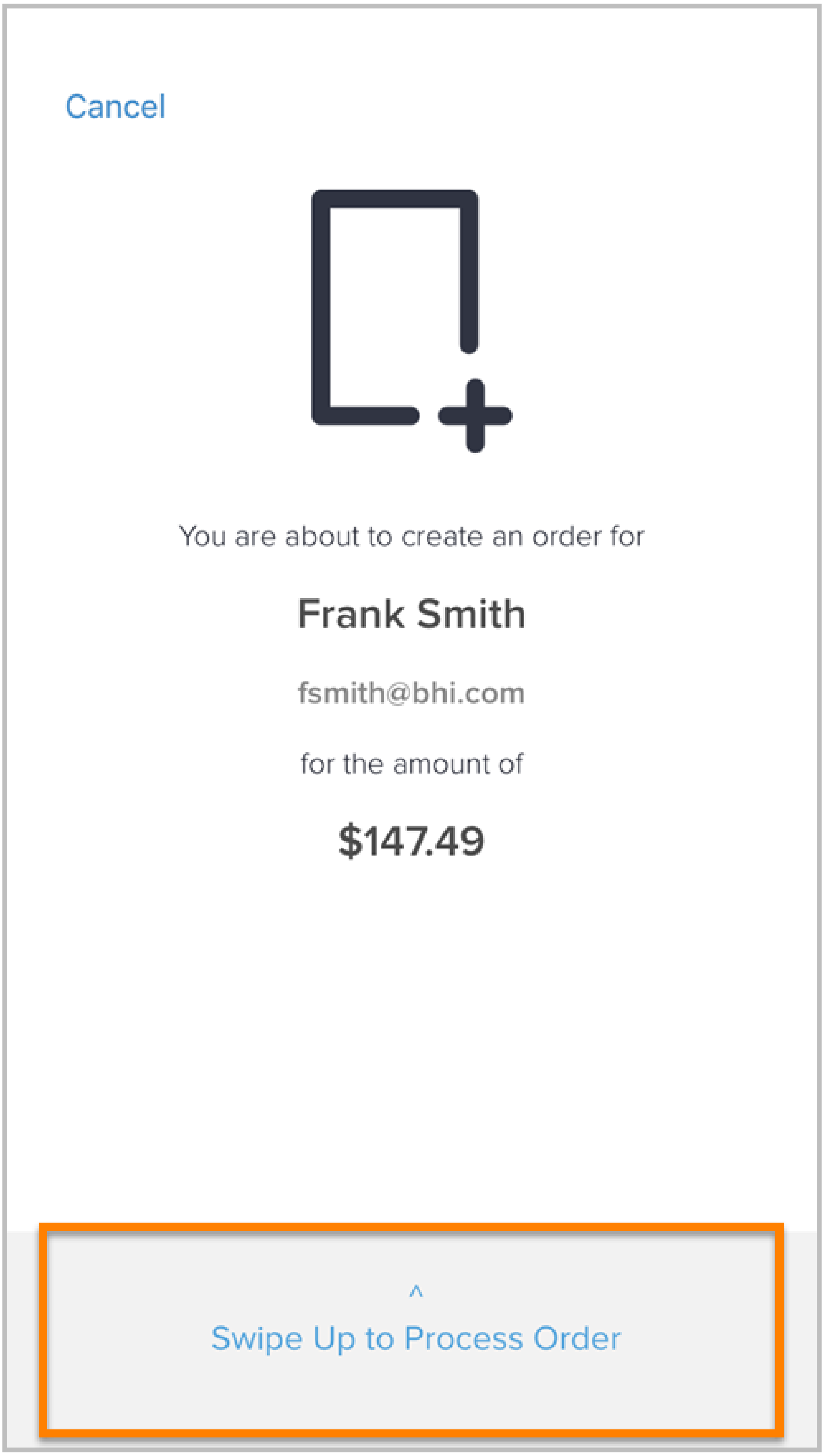


14. The customer's first and last name will be auto-populated if a credit card was used to pay. You can add additional information as needed.

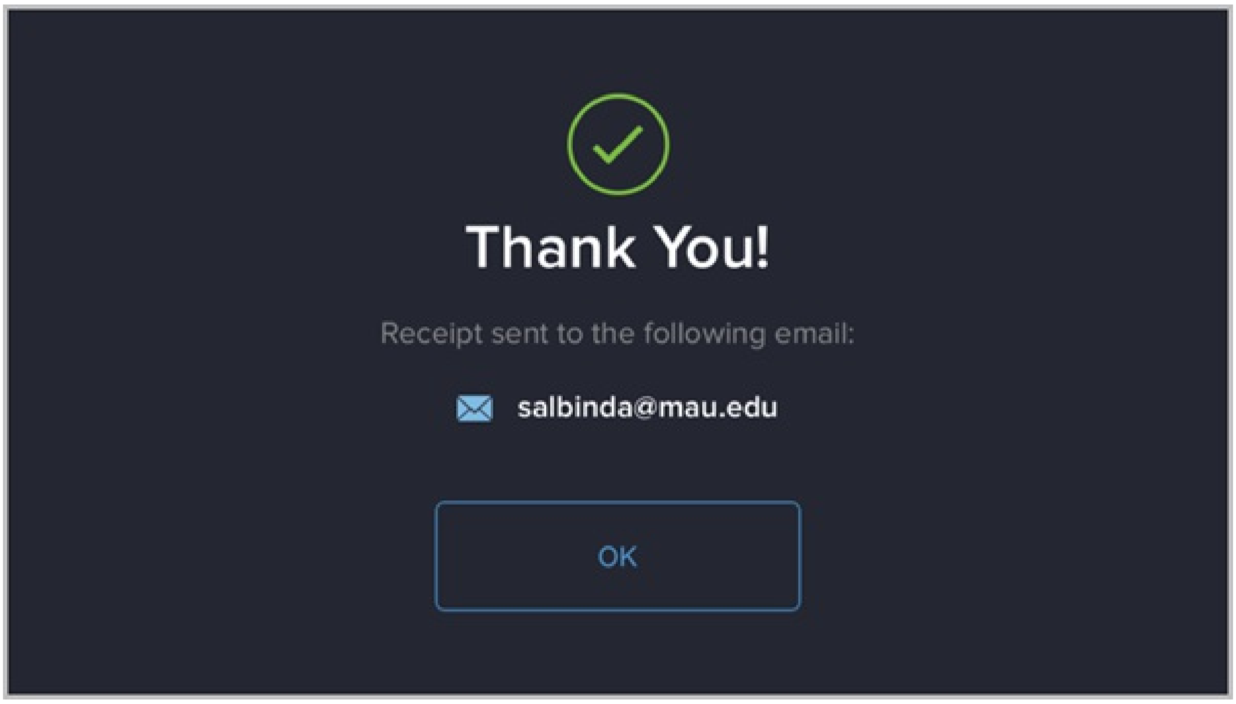
- Email is required for the receipt to be sent.
- Ensure you have permission to send to this contact by checking the box below the Email field.
- Tap Save to automatically advance to the Order Details Screen.



15. To accept the order details, swipe up to process.



16. Hand the mobile device over to customer at this screen. The customer can sign for the order and tap **Accept** when the payment has completed processing.



Problems with your credit card reader? If you experience a problem with your Infusionsoft Mobile credit card reader, please first contact Infusionsoft support . If a hardware issue is identified, Infusionsoft support will provide instructions for returning and claiming a replacement from the manufacturer.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Mobile Payments Android

Last Modified on 08/02/2018 3:54 pm MST

An Active **US Infusionsoft Payments** account is required to use the Infusionsoft Mobile Payments feature.

For information on connecting your Infusionsoft Payments Mobile Card Reader, please see This Article .

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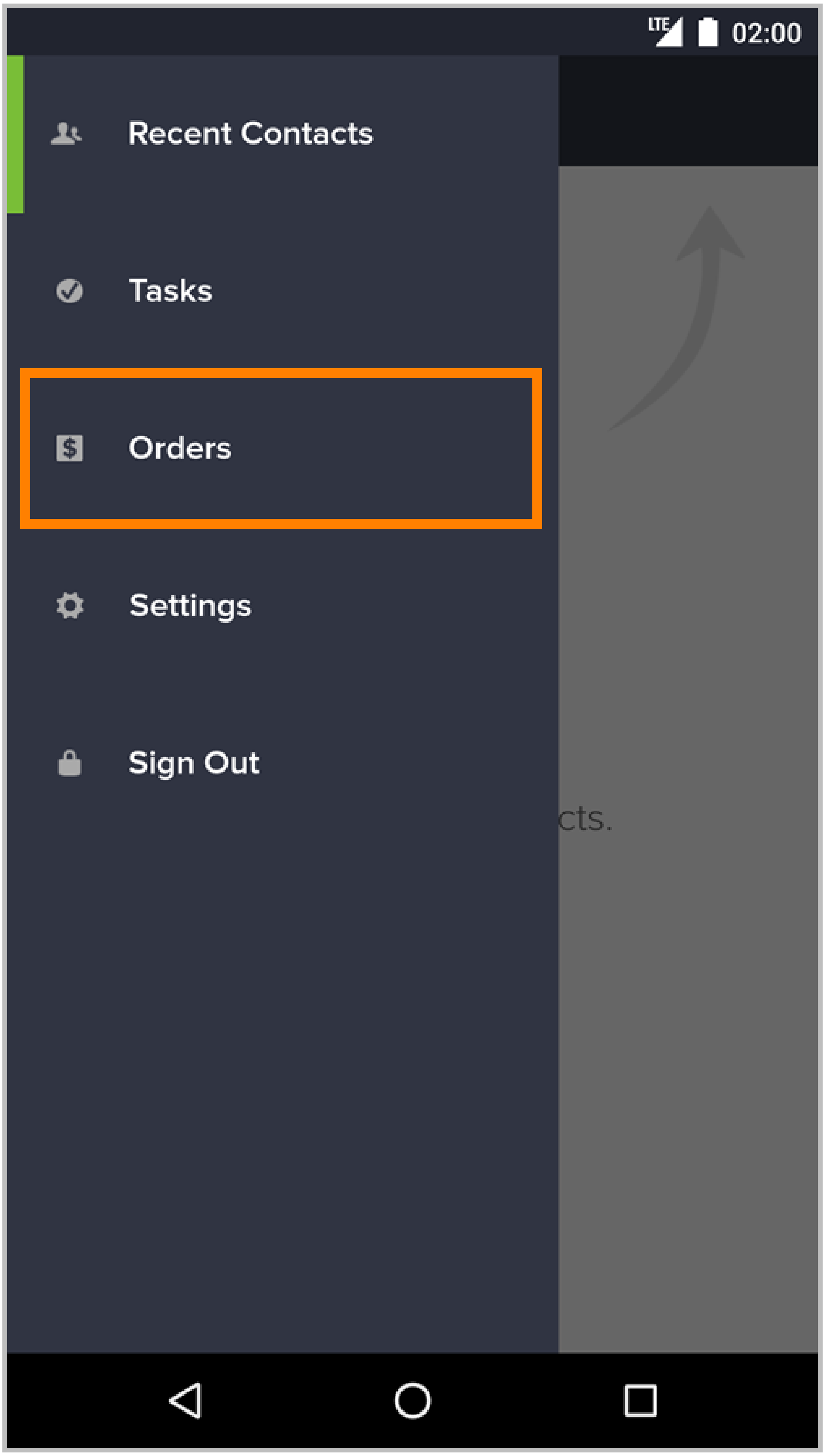

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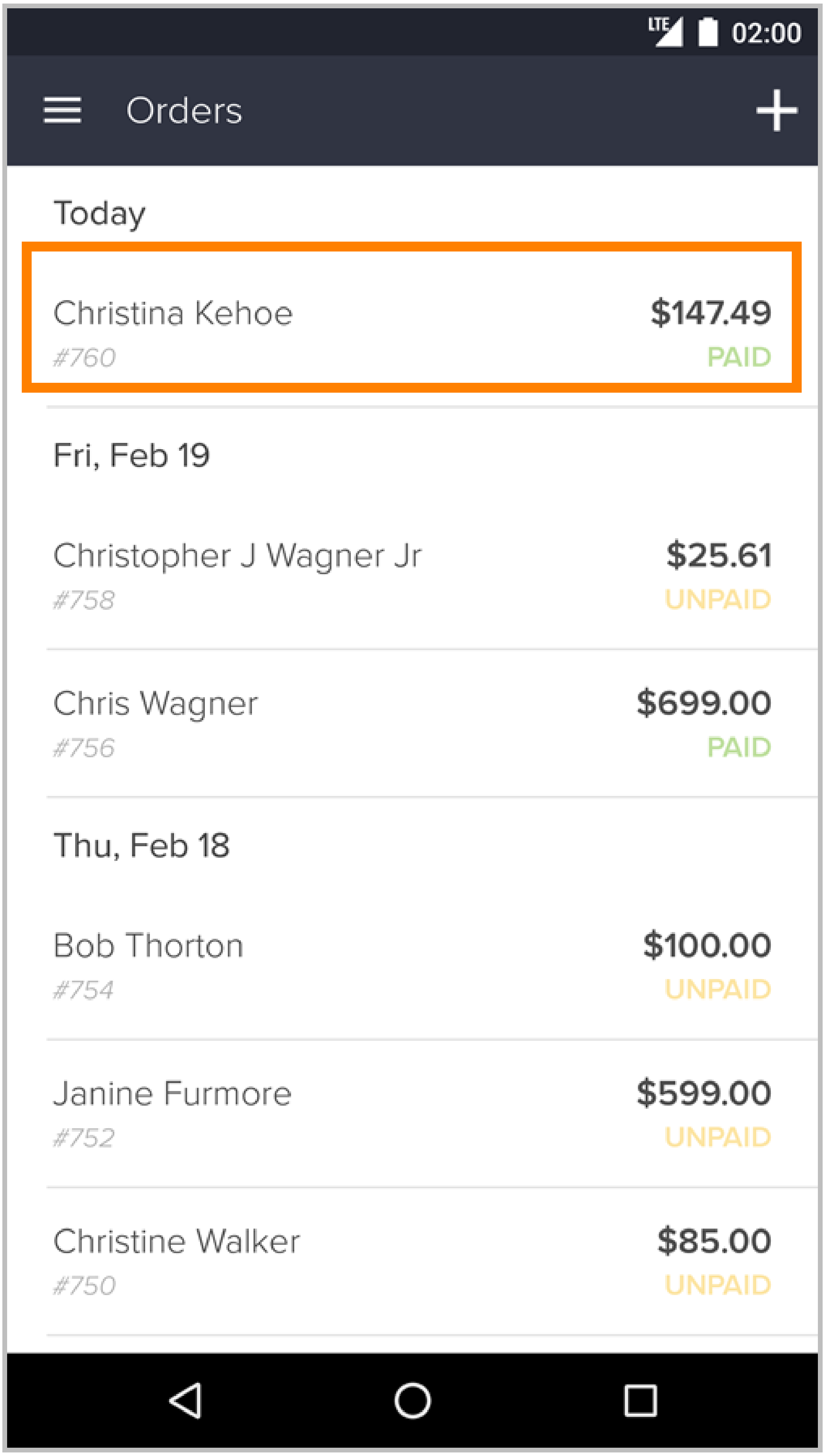

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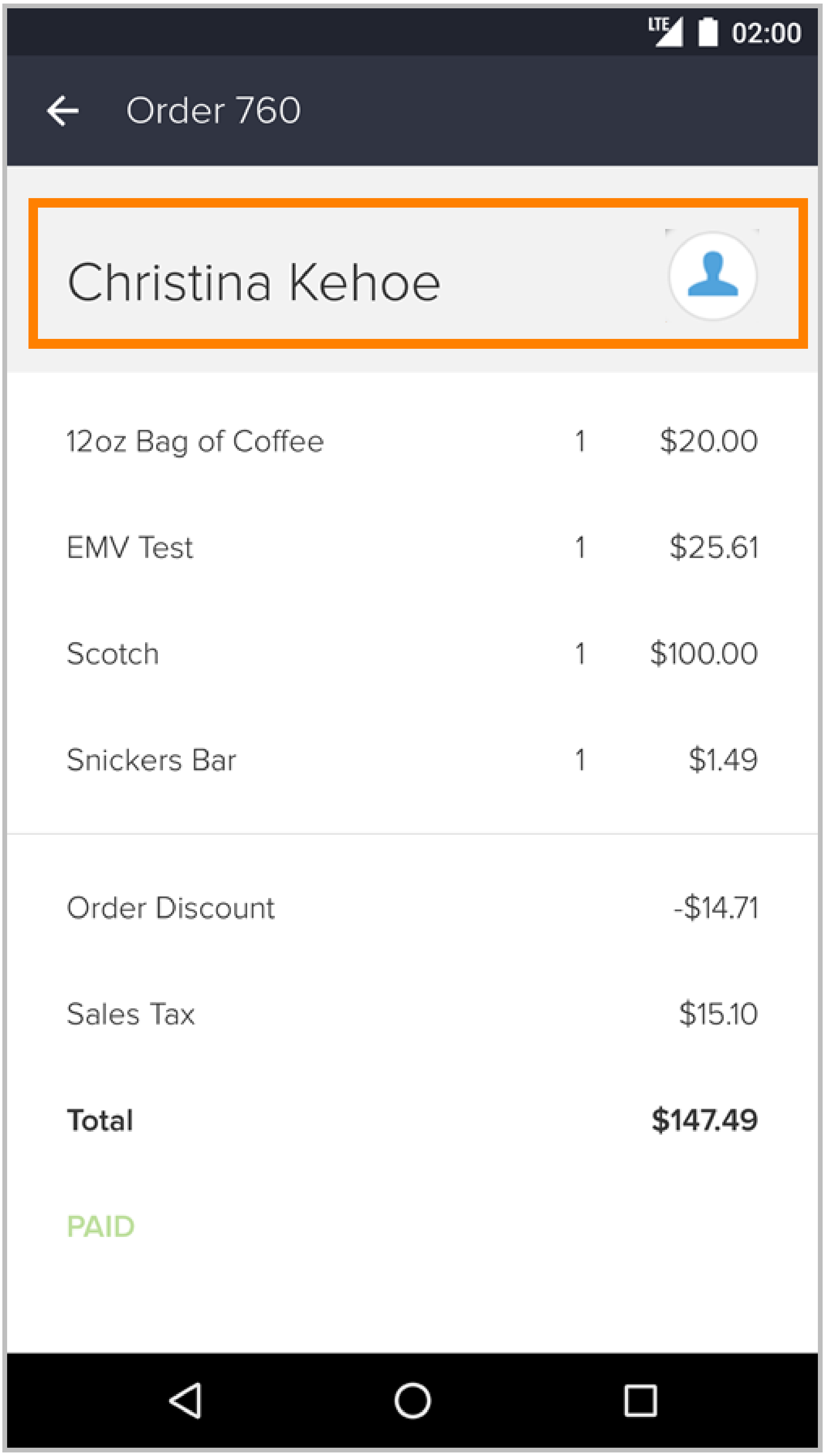

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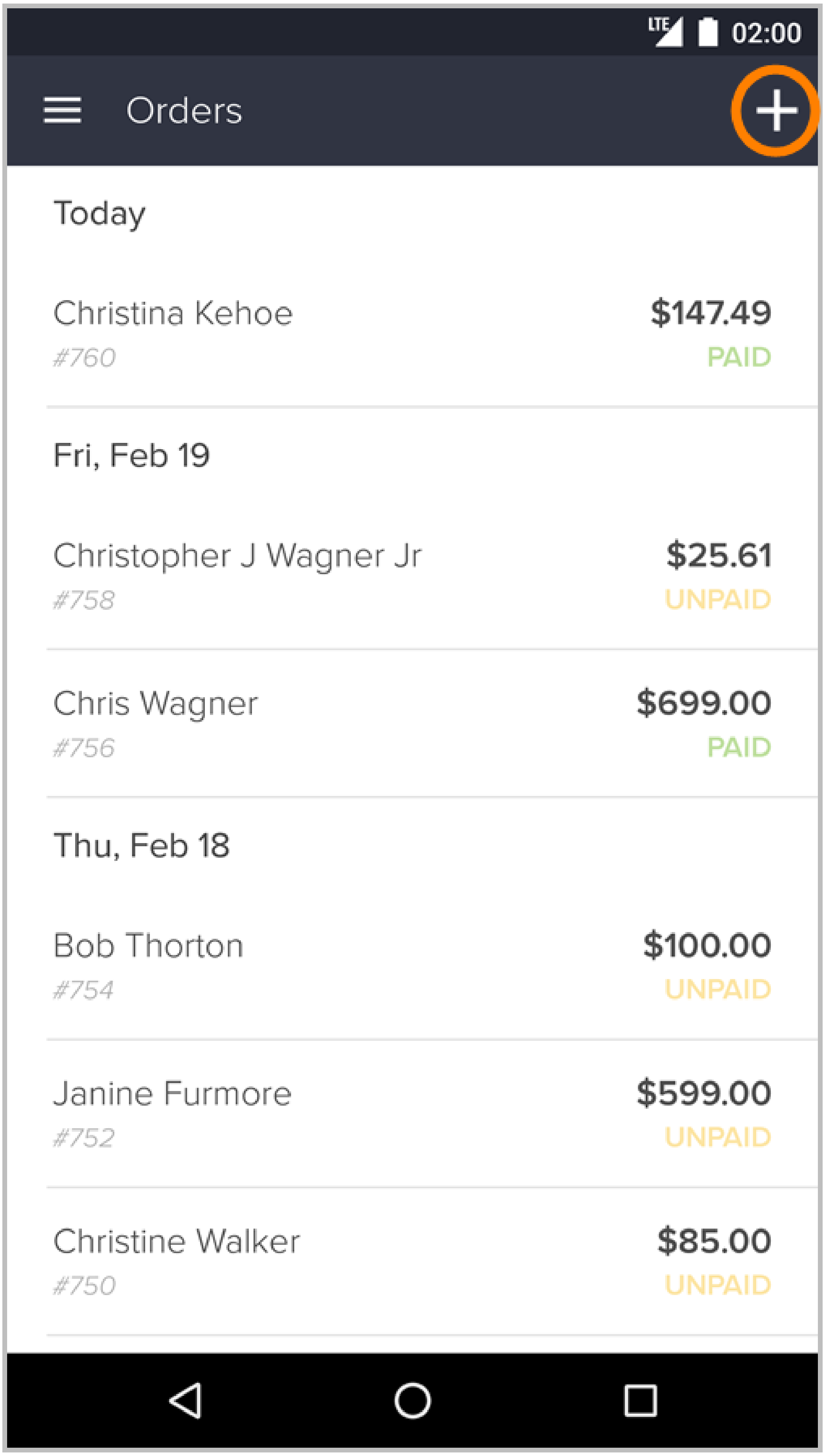

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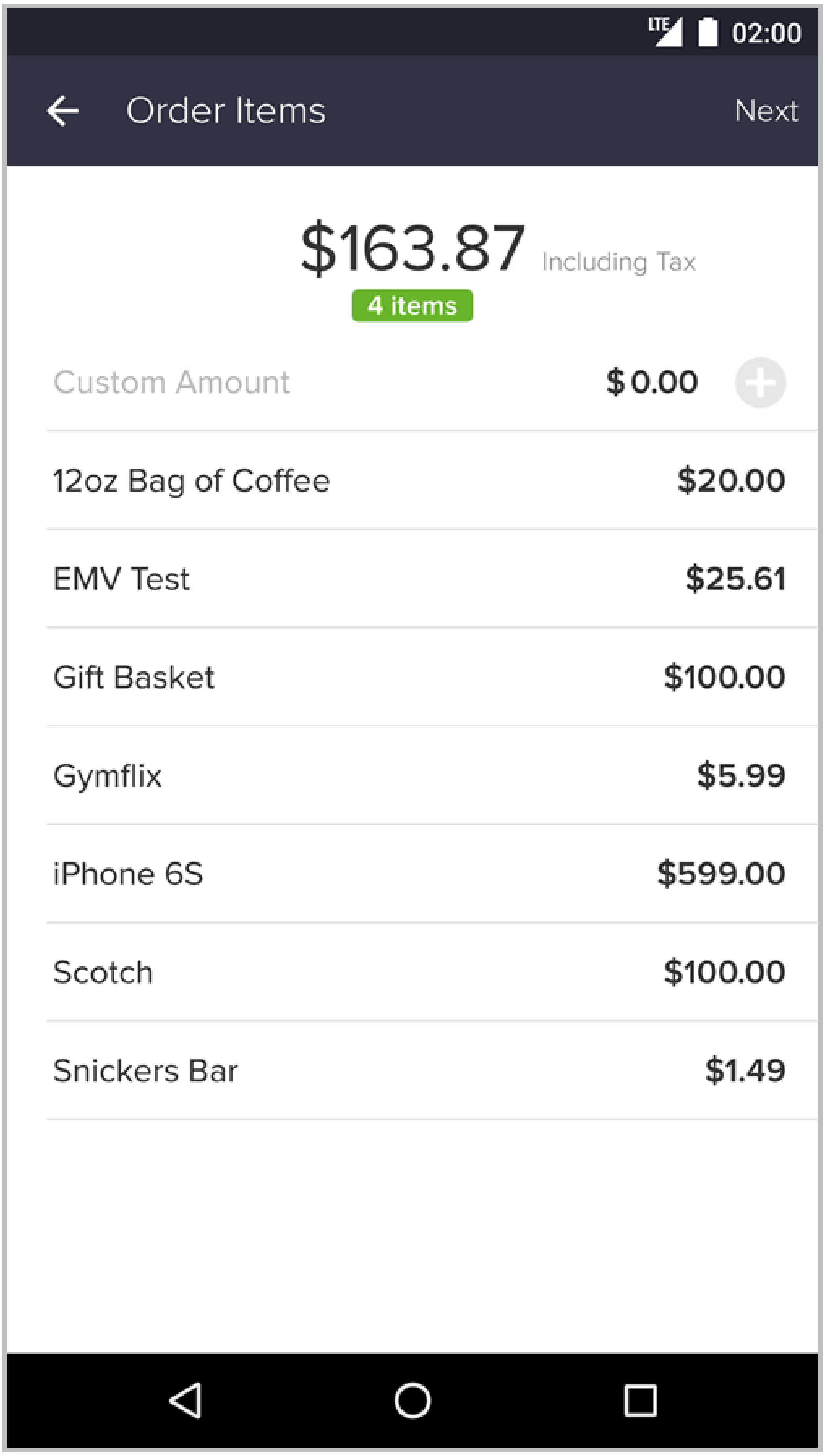

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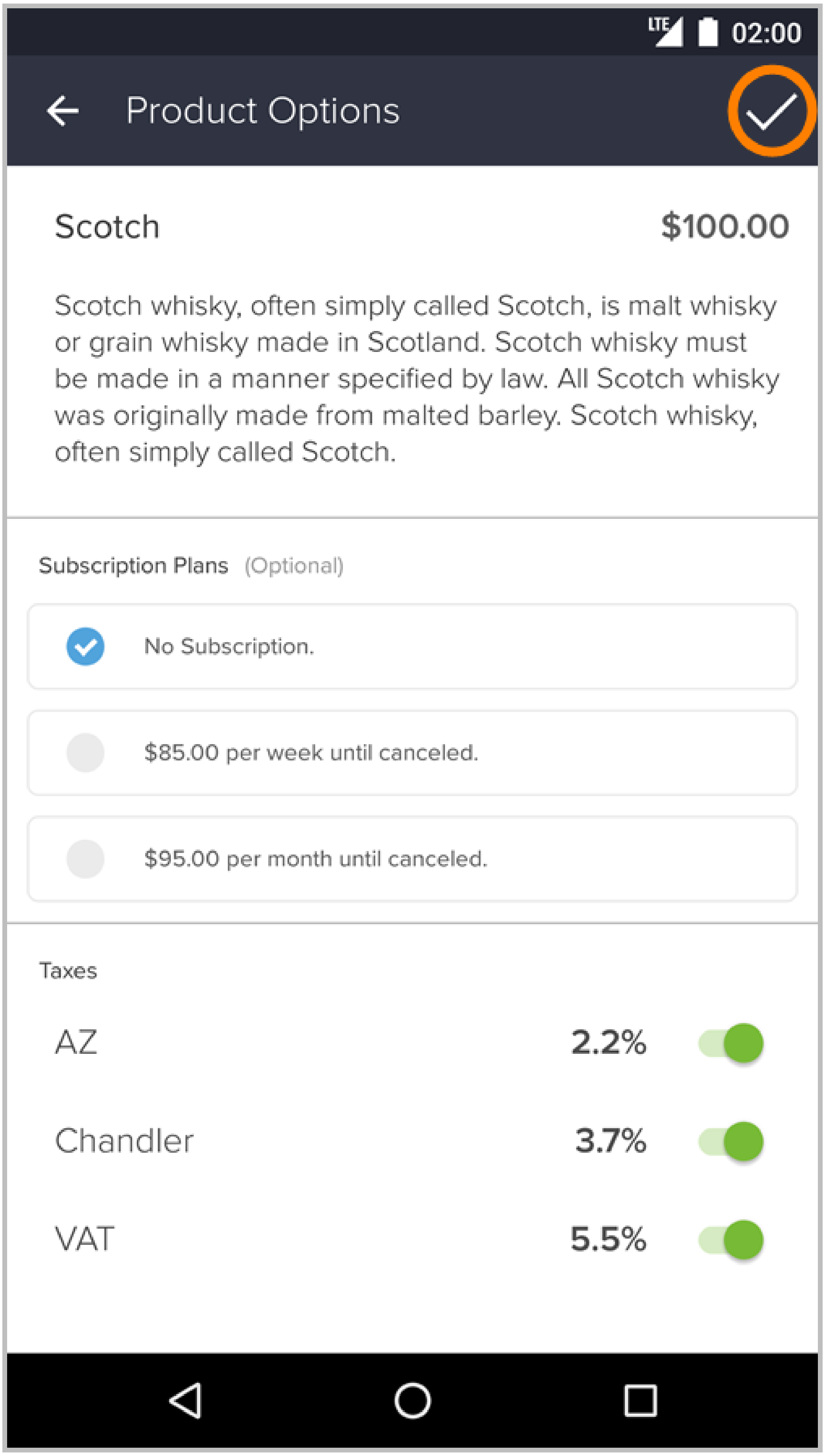

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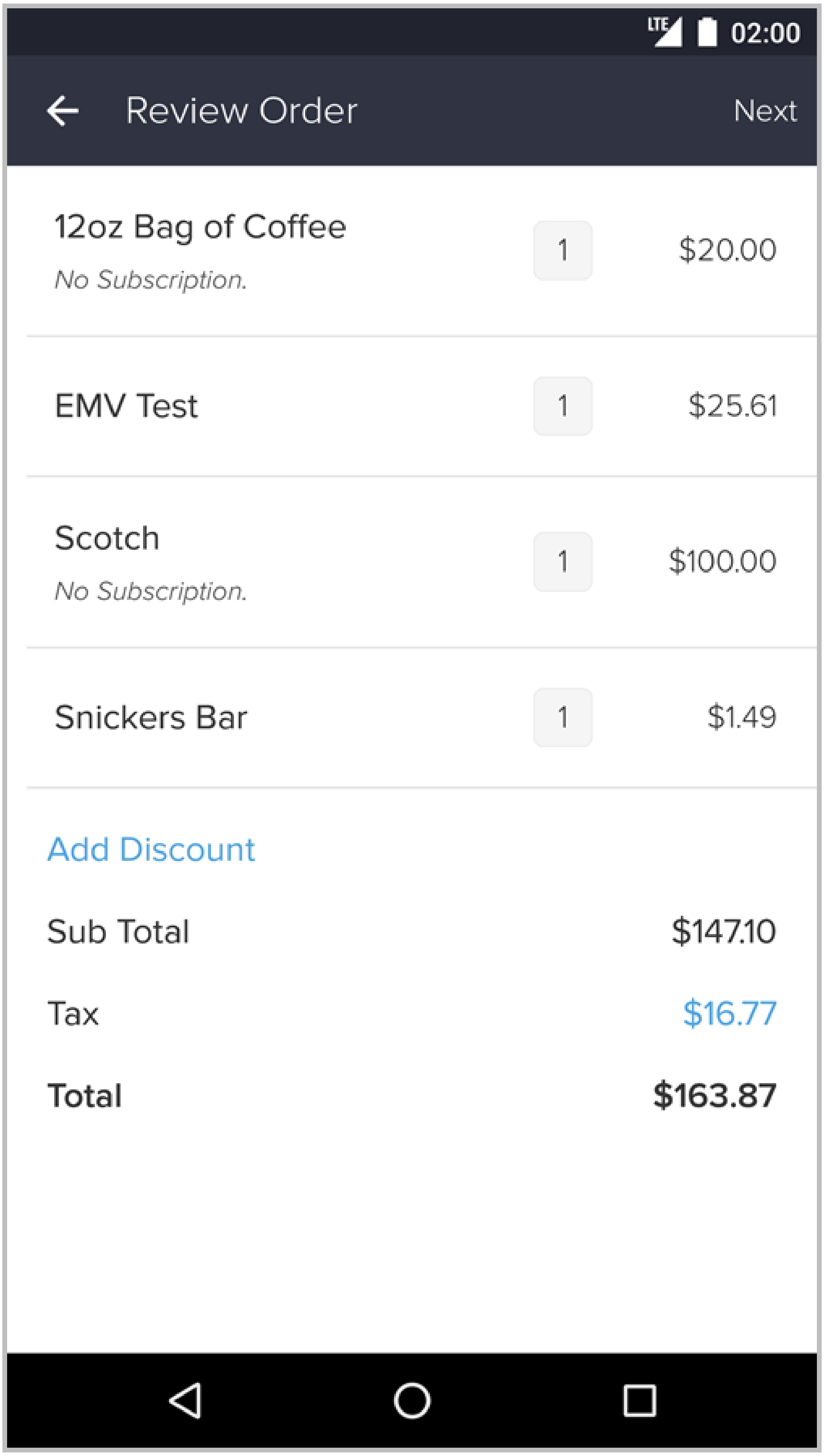

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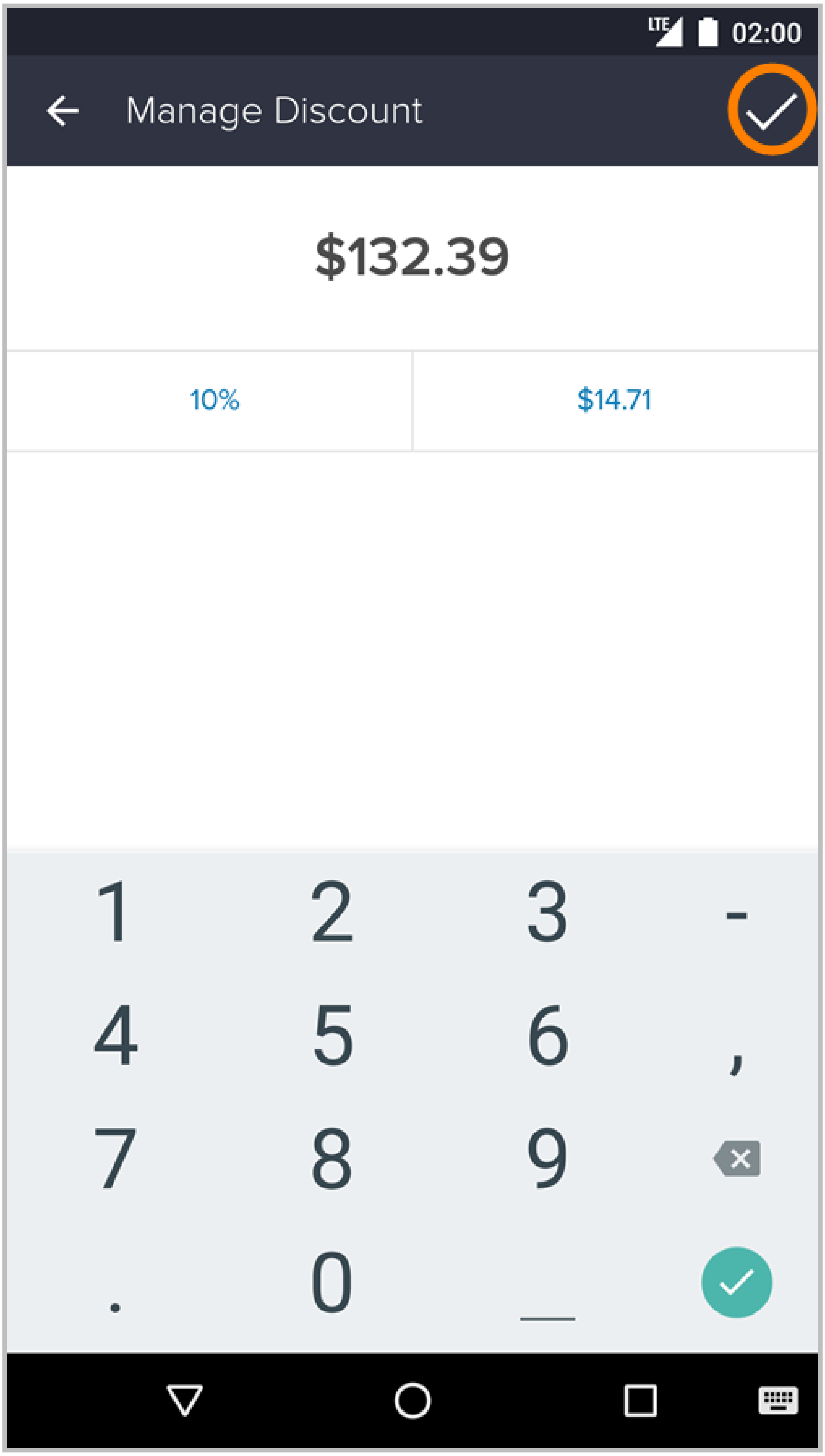

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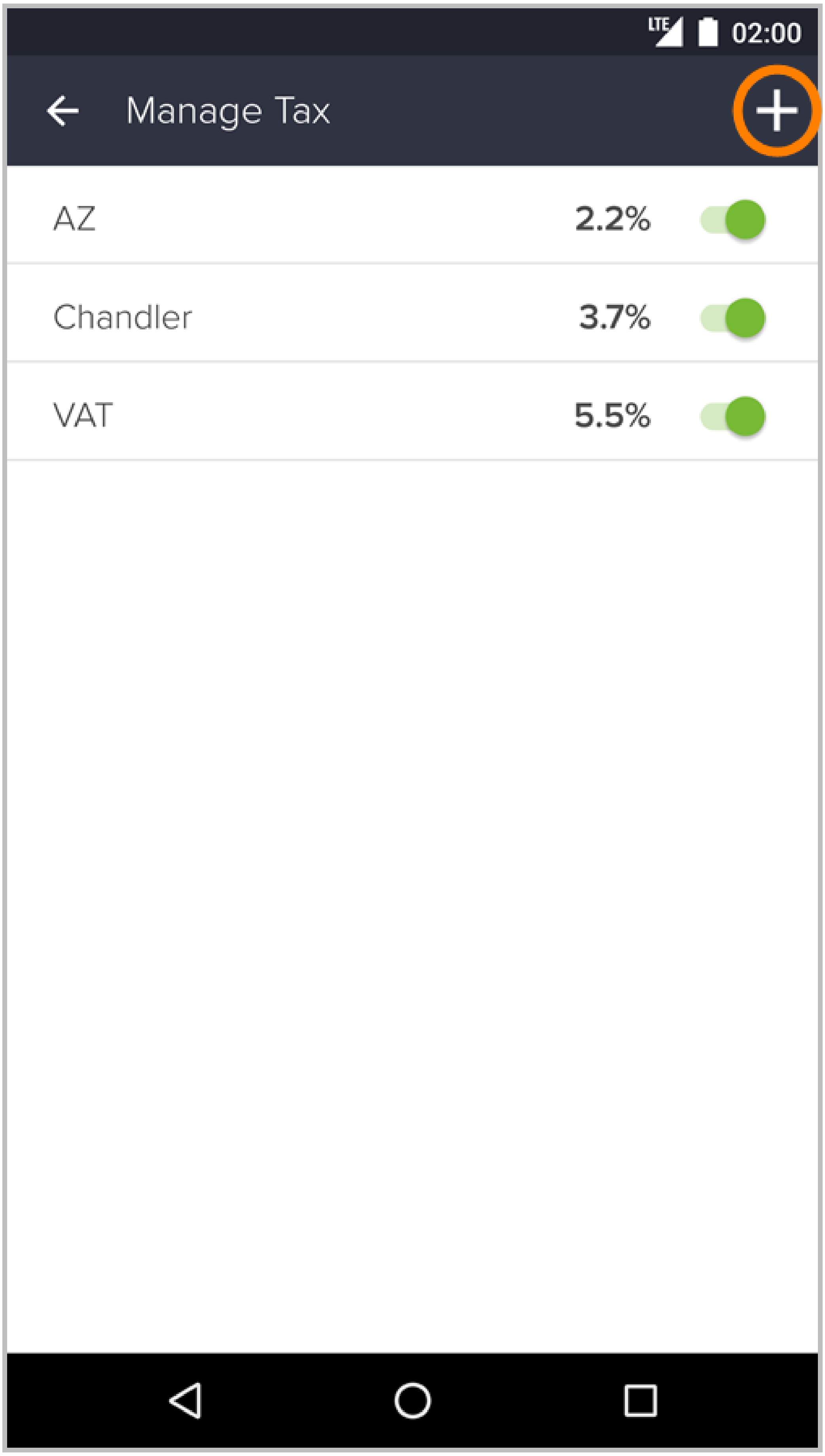

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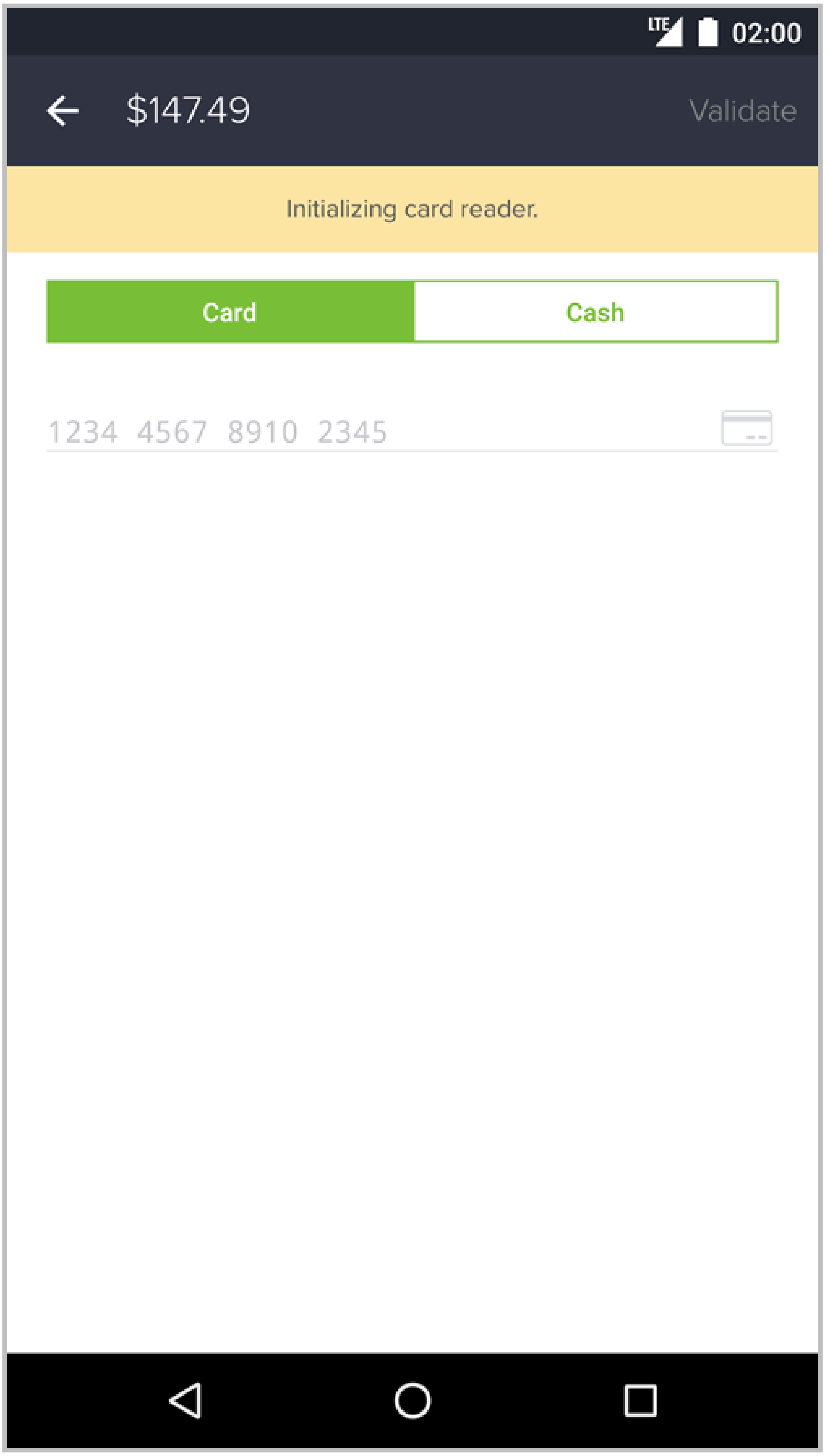

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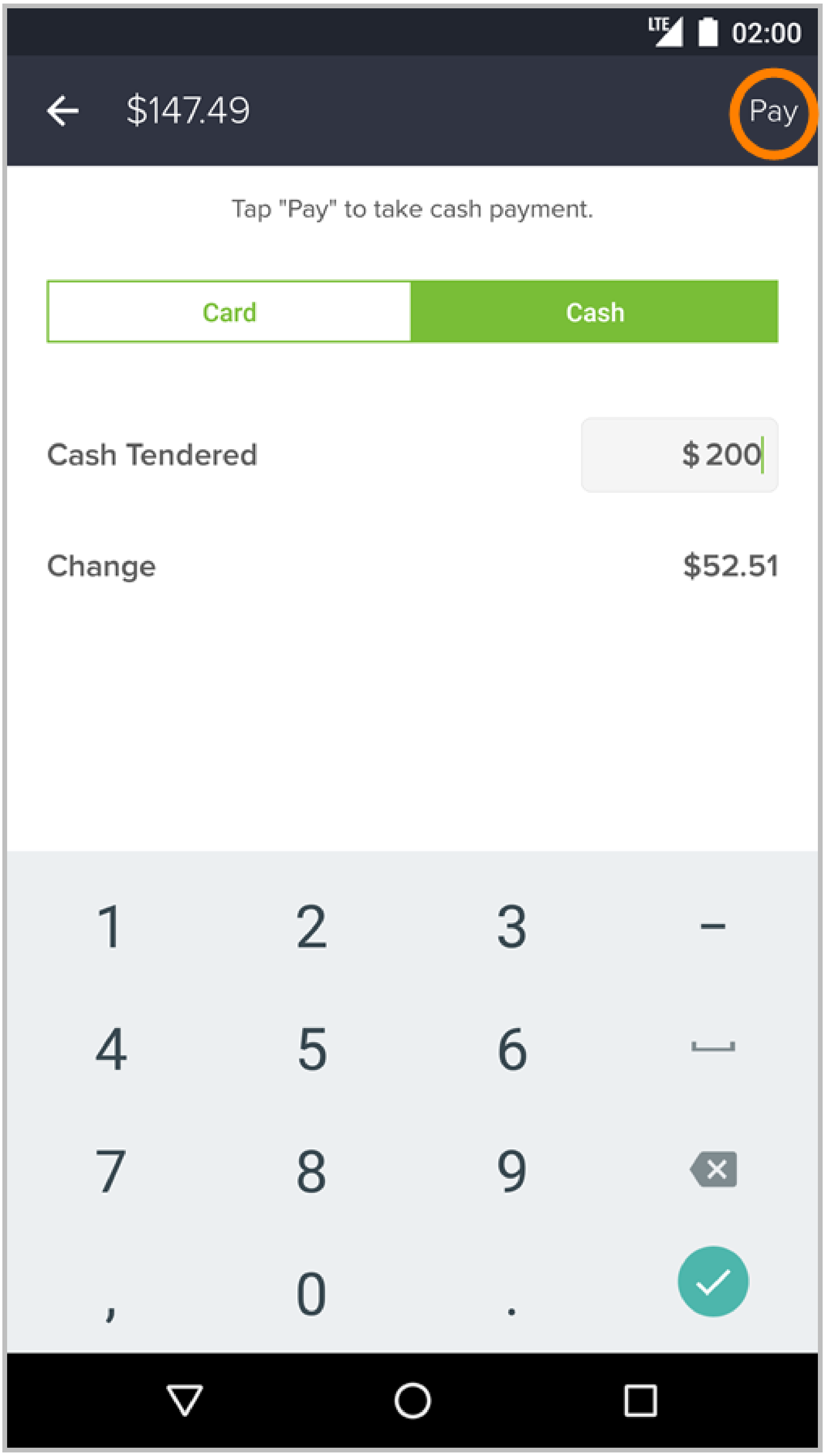
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Tap "Pay" to take cash payment.
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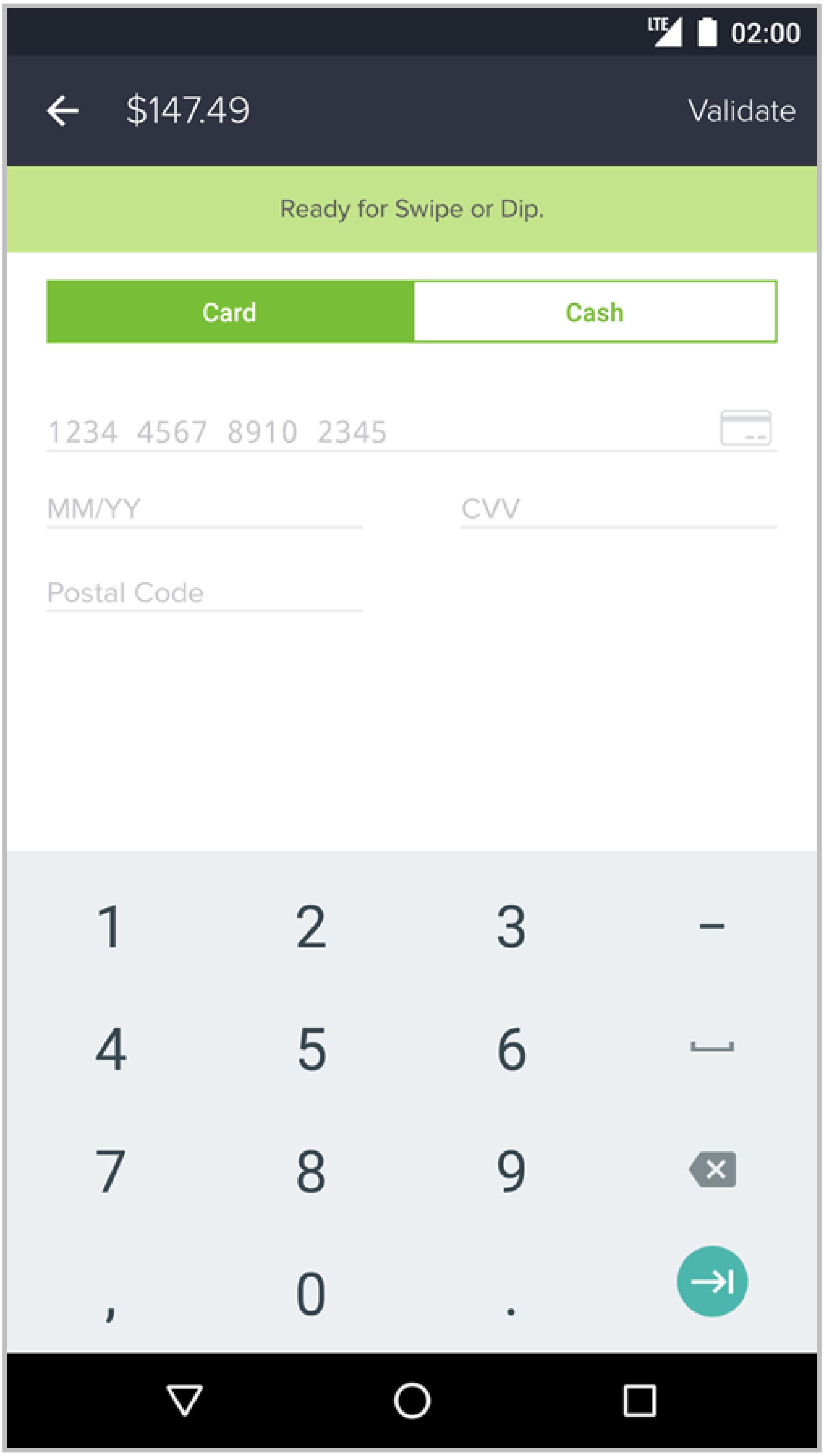

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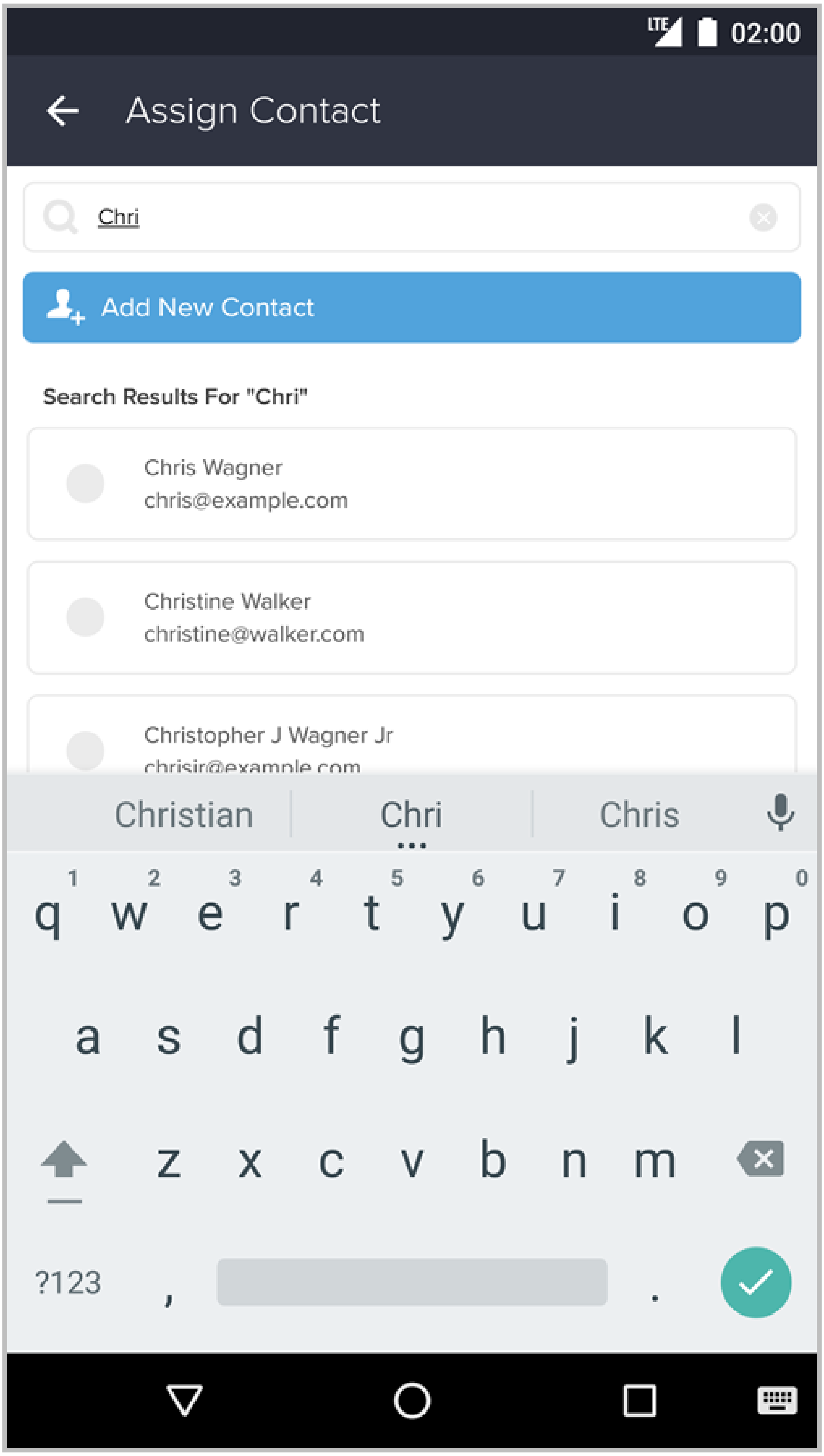

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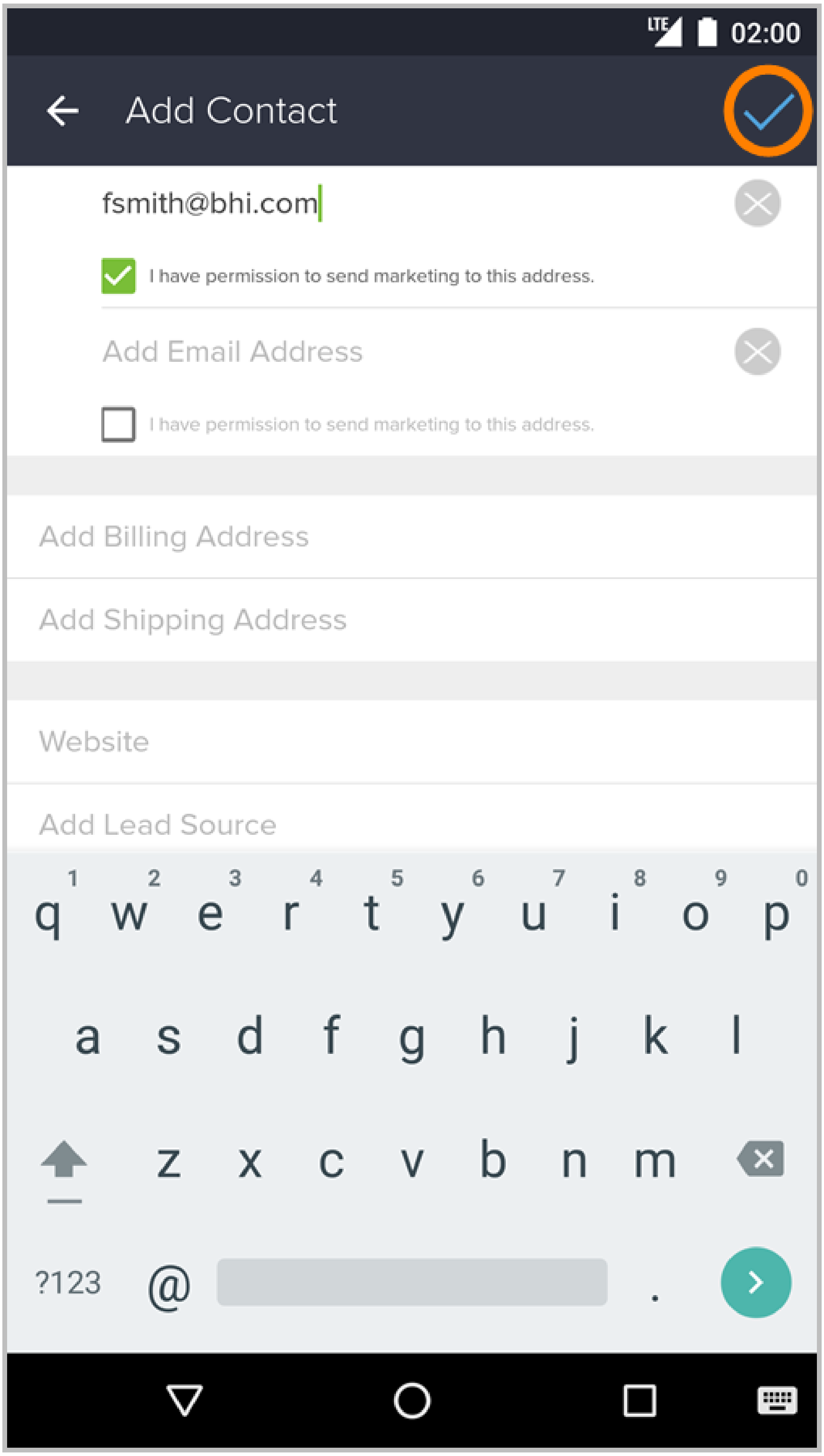

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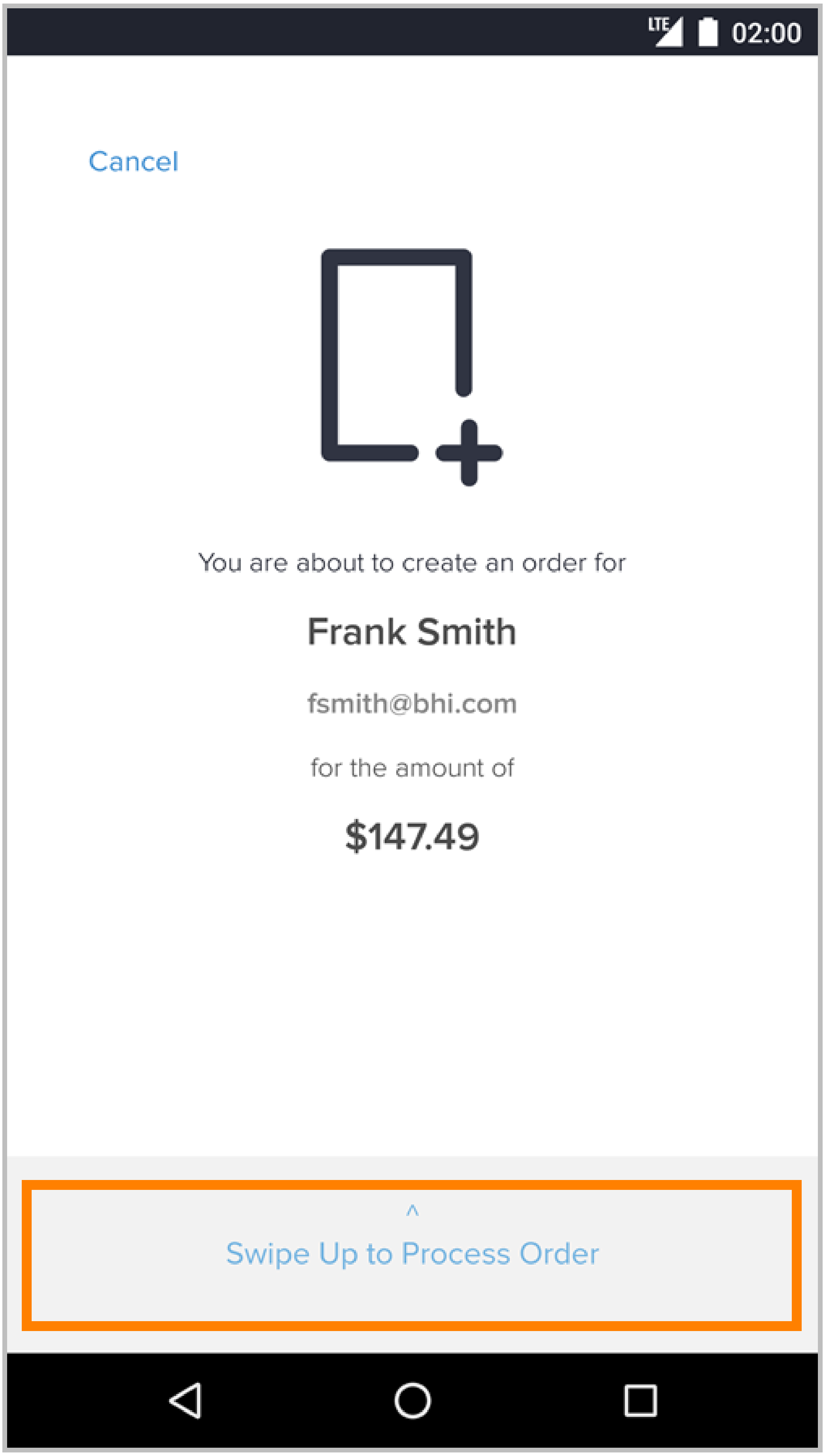
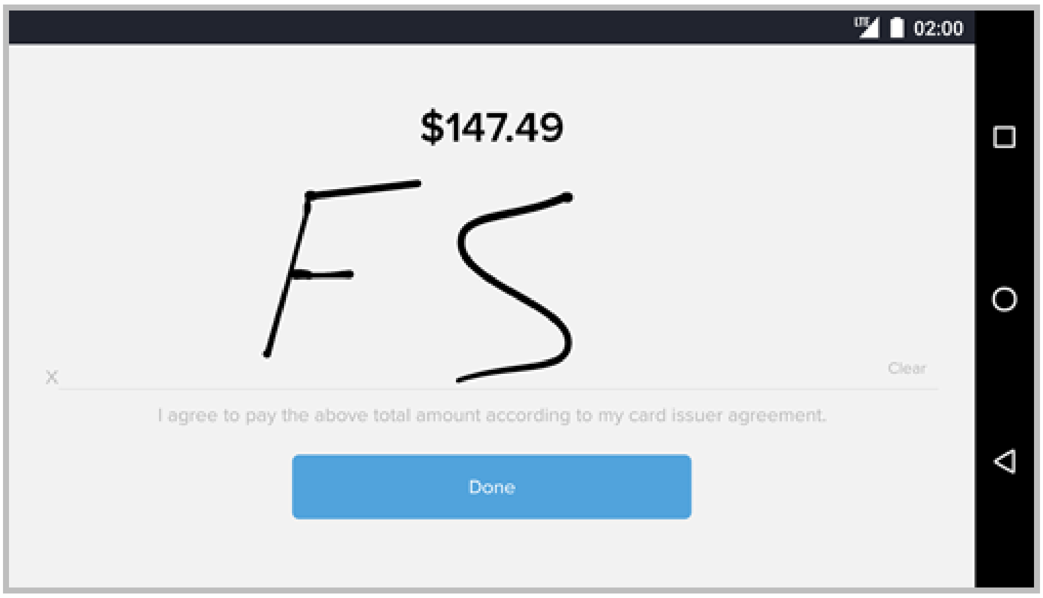
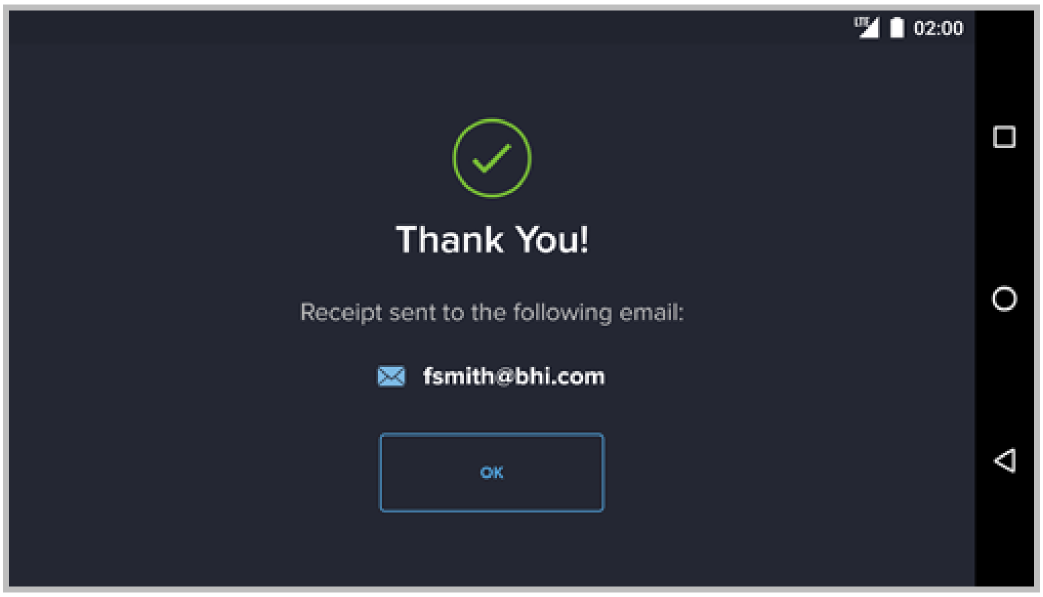


16. Hand the mobile device over to customer at this screen. If the customer paid via credit card, they can sign for the order and tap **Done** when the payment has completed

processing.



17. Your customer will now view a success message and click **OK**.



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Infusionsoft Payments Mobile Card Reader

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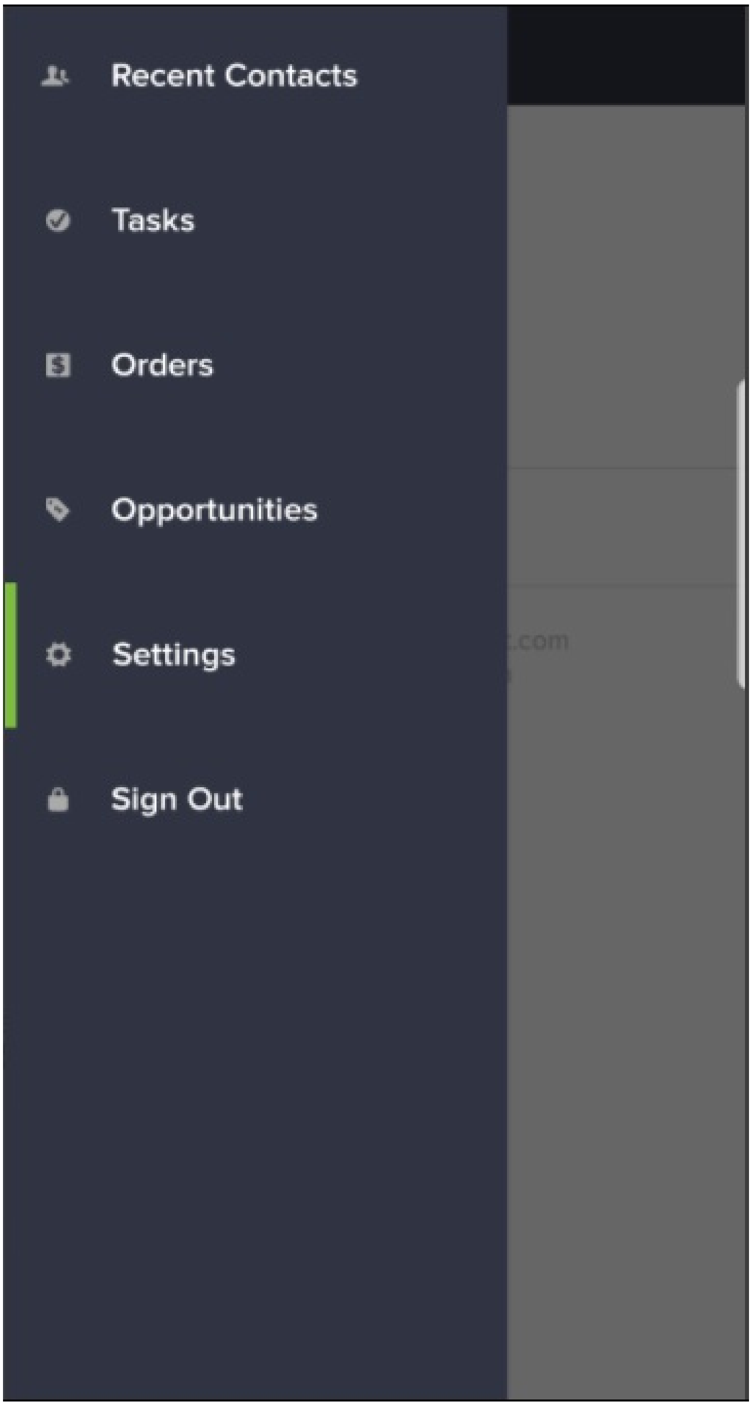
An Active US Infusionsoft Payments account is required to use the Infusionsoft Mobile Payments feature.

The Infusionsoft Payments Mobile Card Reader allows for payments to be taken, via orders, created in the Infusionsoft Mobile application, for Android and IOS. There are 2 versions of the Infusionsoft Payments Mobile Card Reader. The following steps will instruct on connecting the older audio jack model, and the new Bluetooth model, to a compatible device.

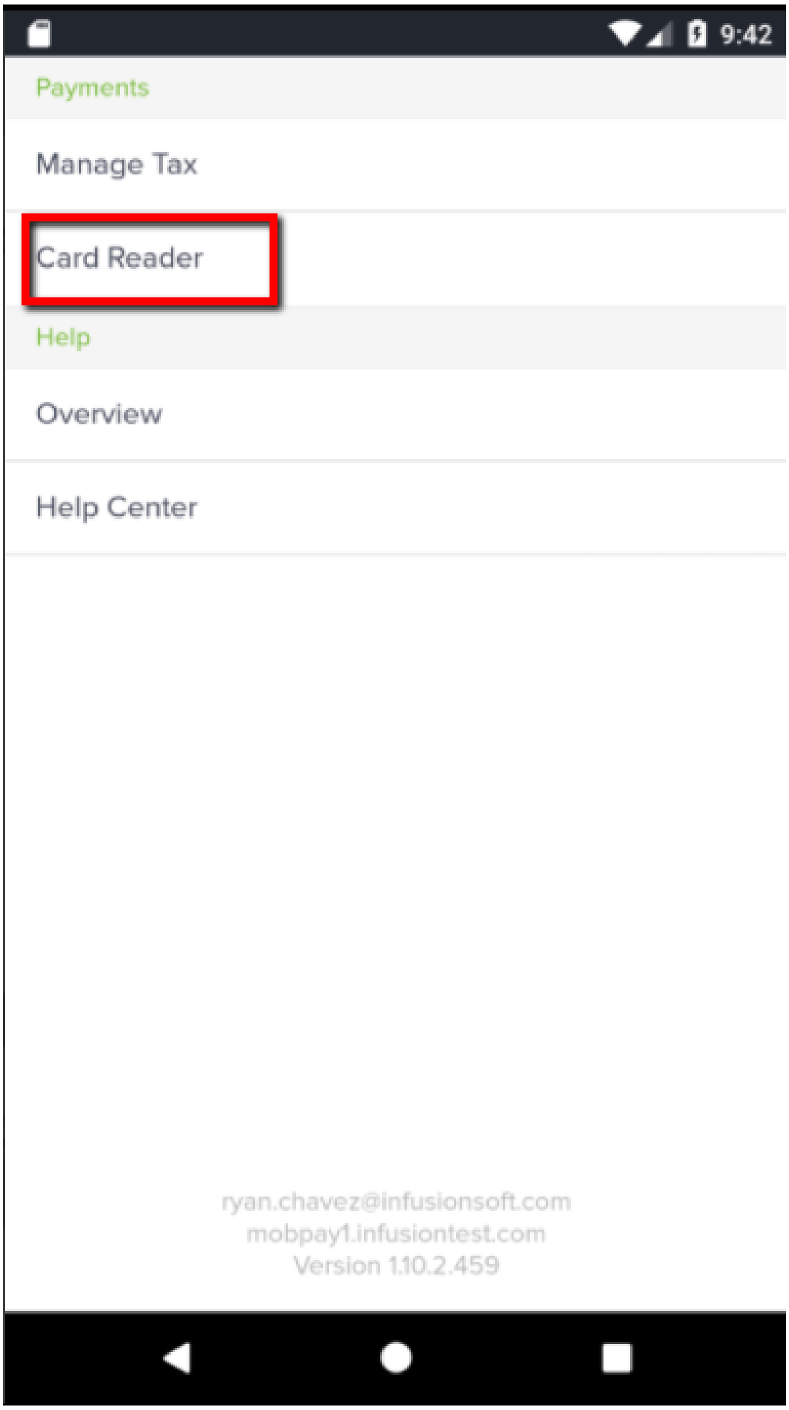
How to Use

1. Launch the Infusionsoft Mobile application, on a compatible device

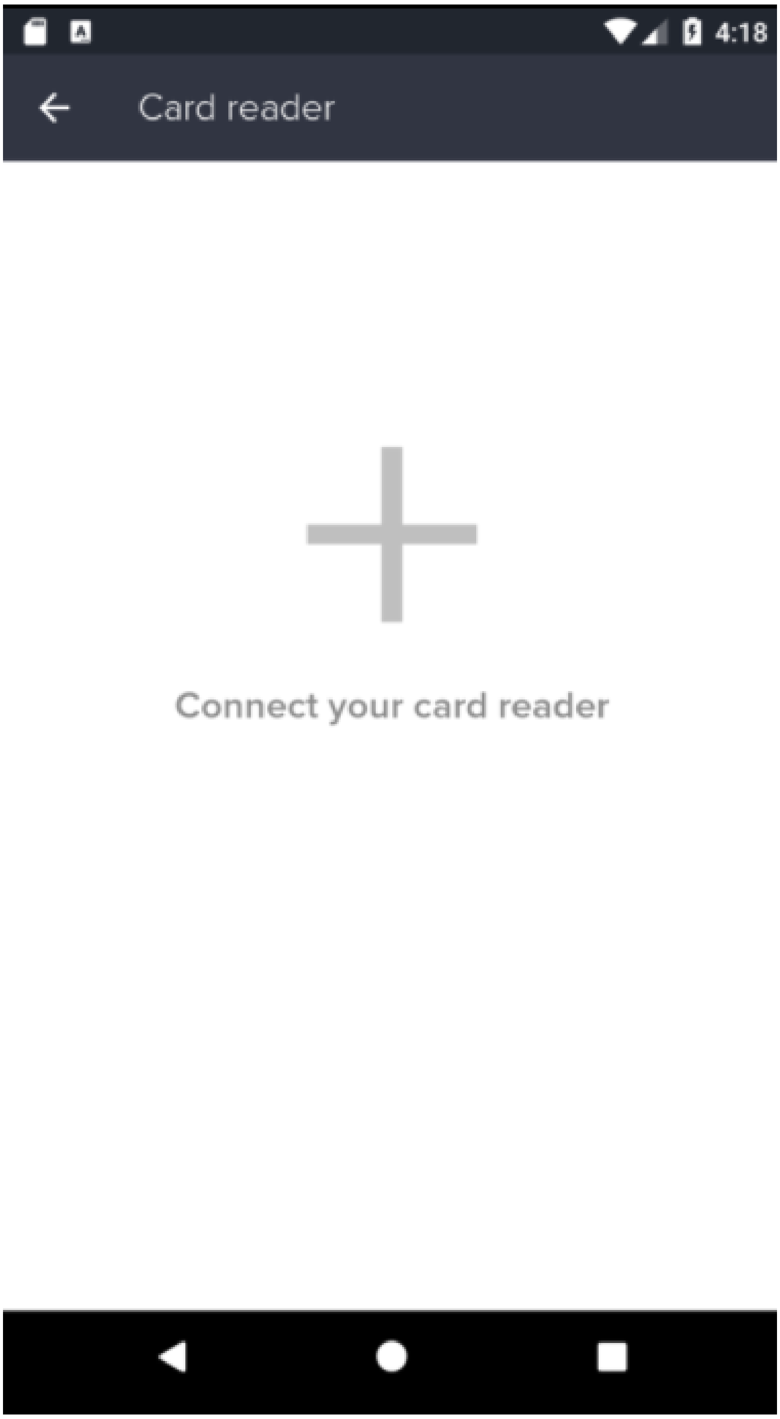
2. Expand the **Menu** and tap **Settings**

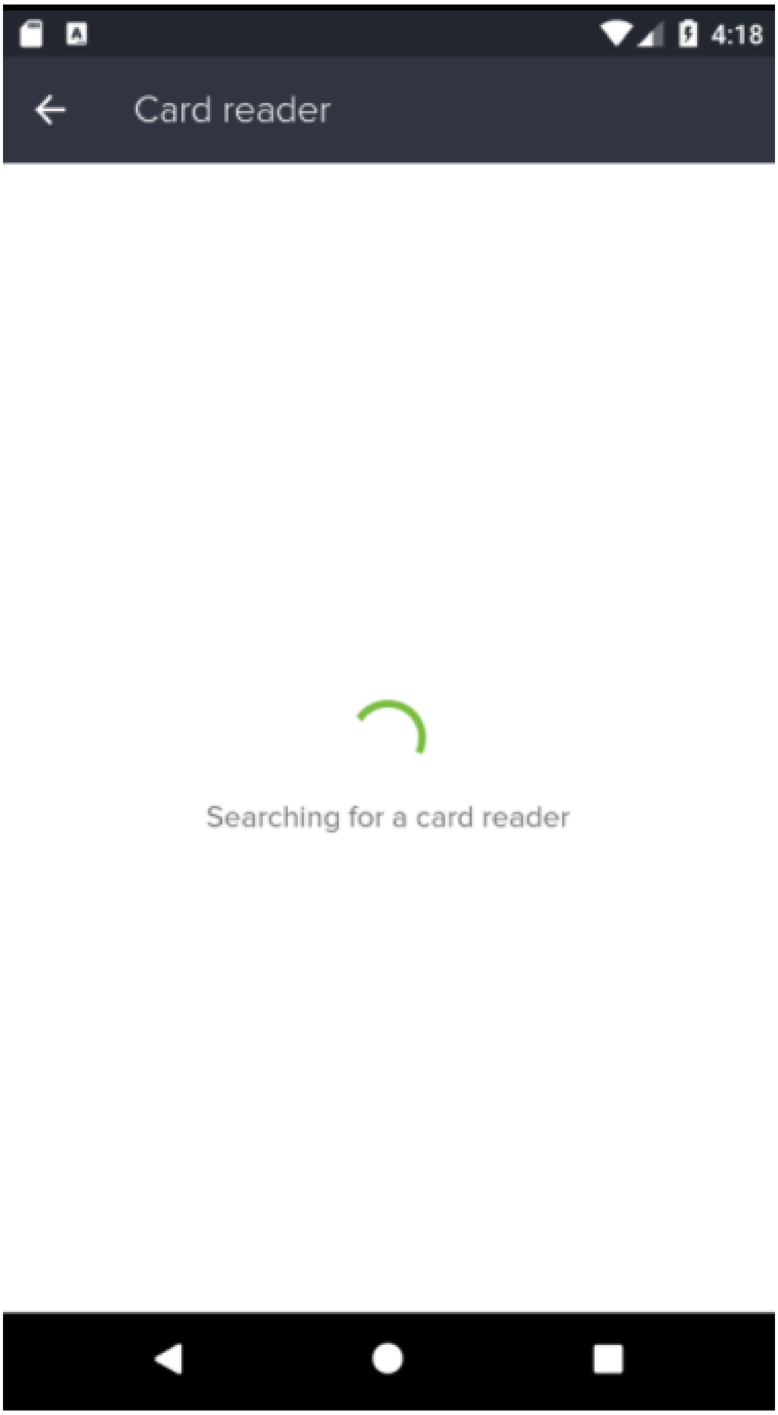


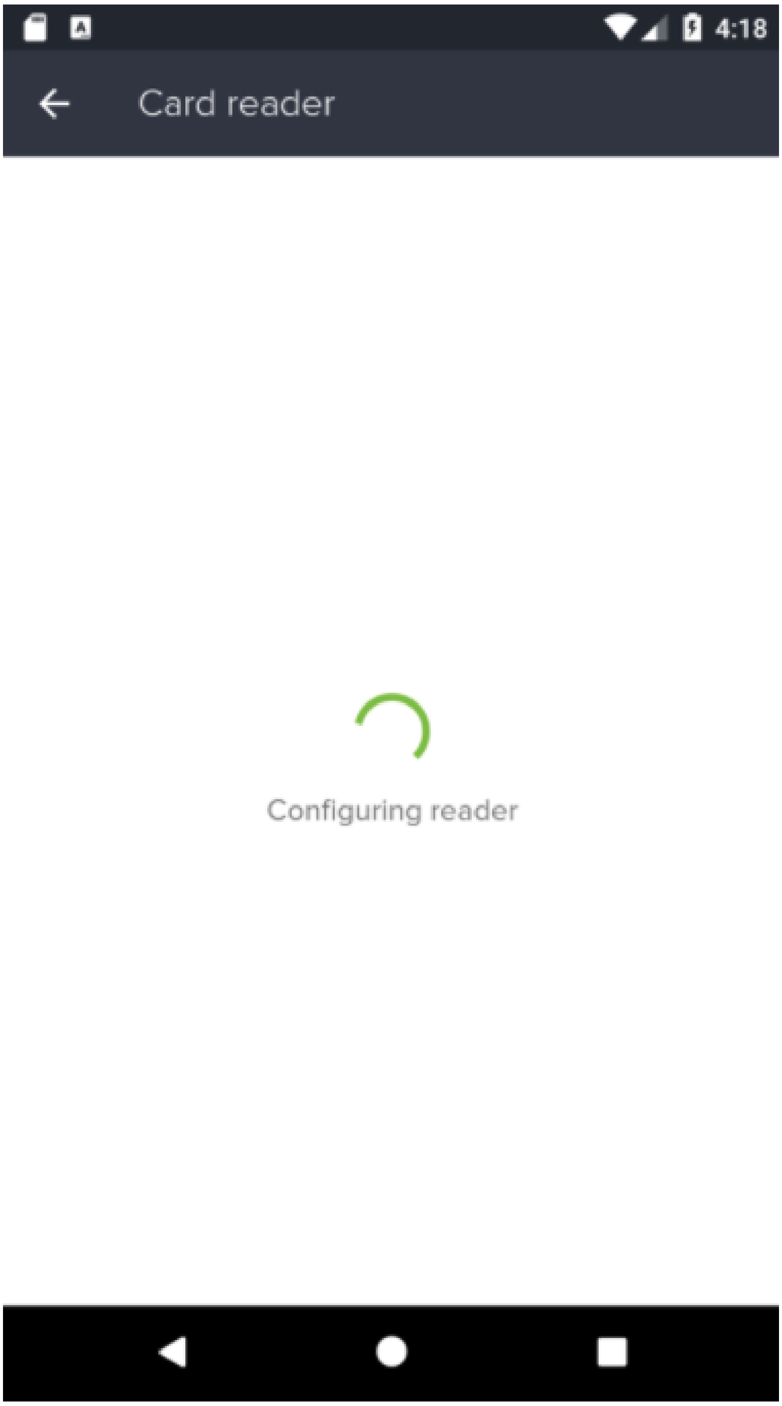
3. Tap on **Card Reader** to view connected readers, or add a reader



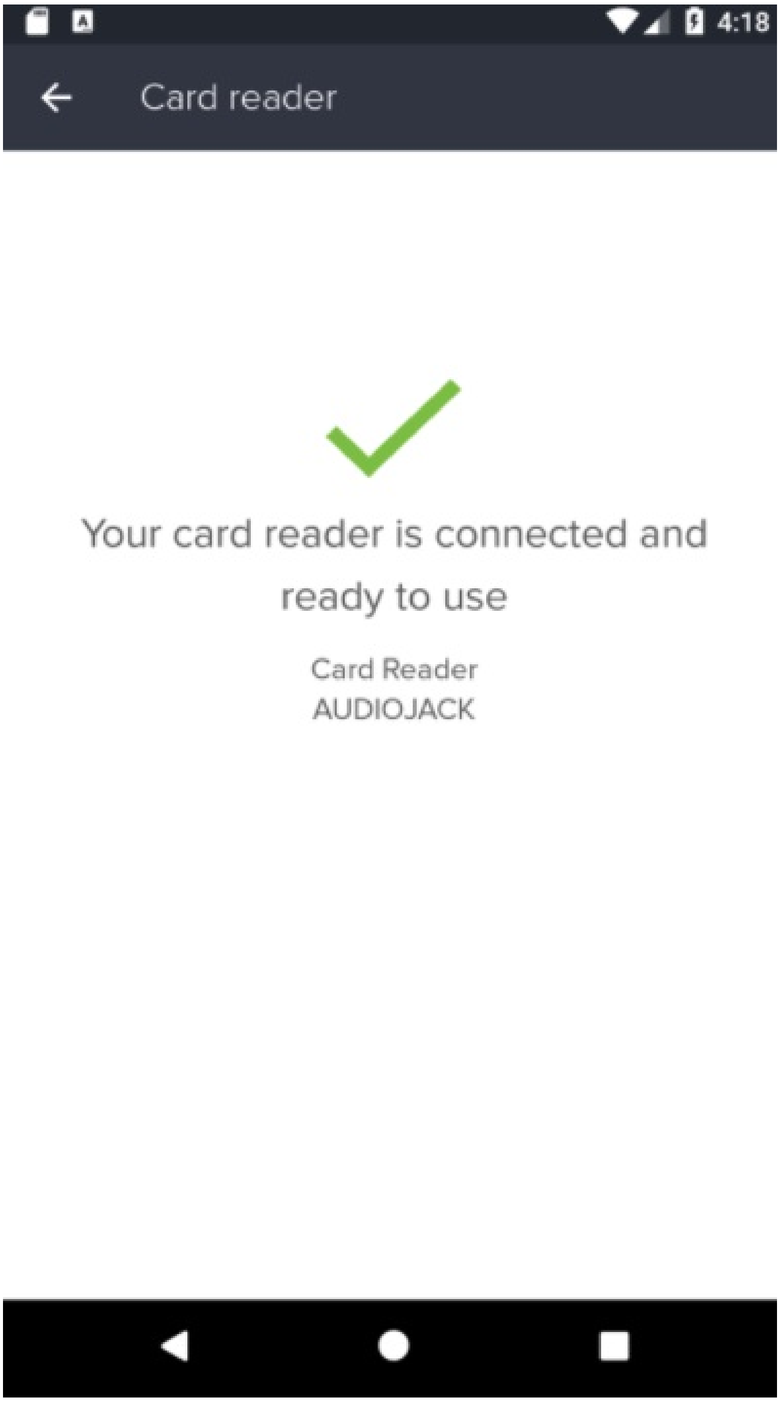
4. Insert Infusionsoft Payments Mobile Card Reader (audio jack model) or have the Infusionsoft Payments Bluetooth Reader, nearby. Tap **Connect your card reader**

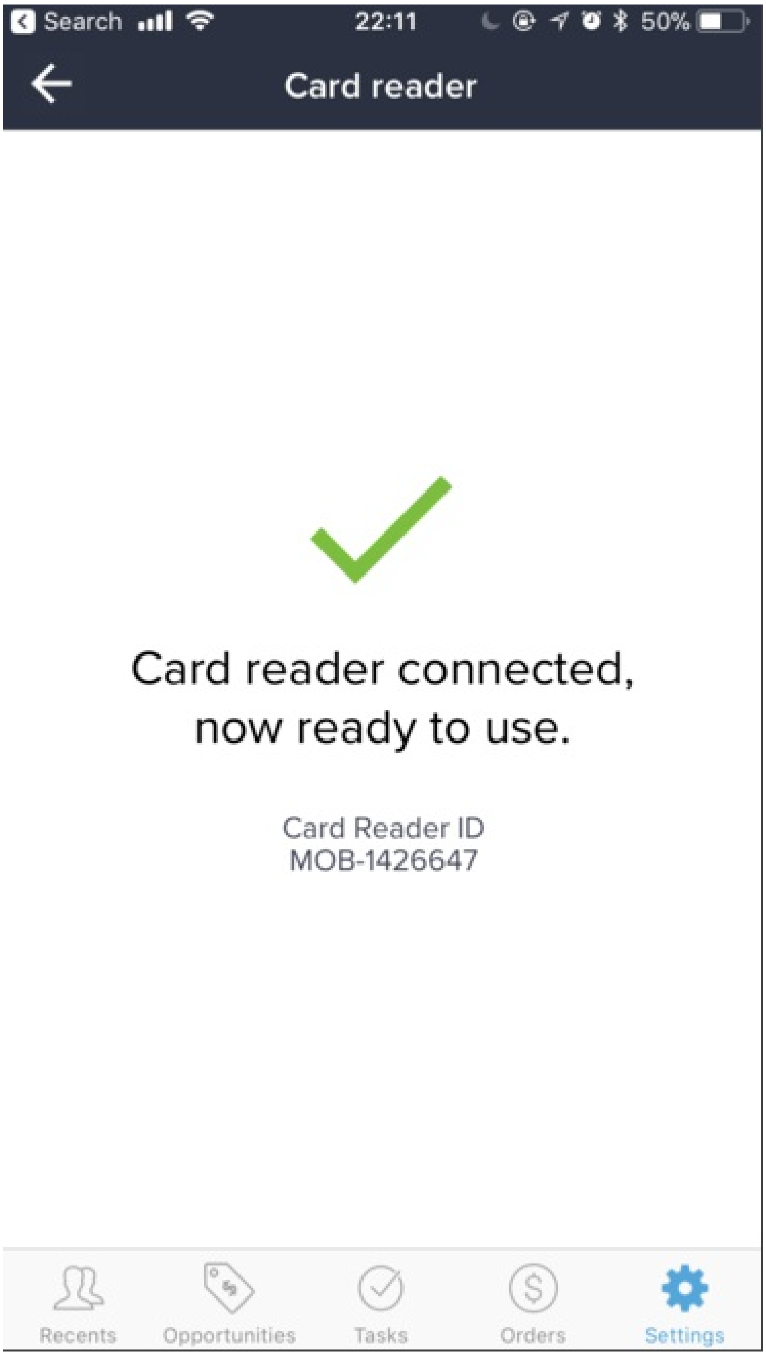

4:18
Card reader
Connect your card reader


4:18
Card reader
Searching for a card reader



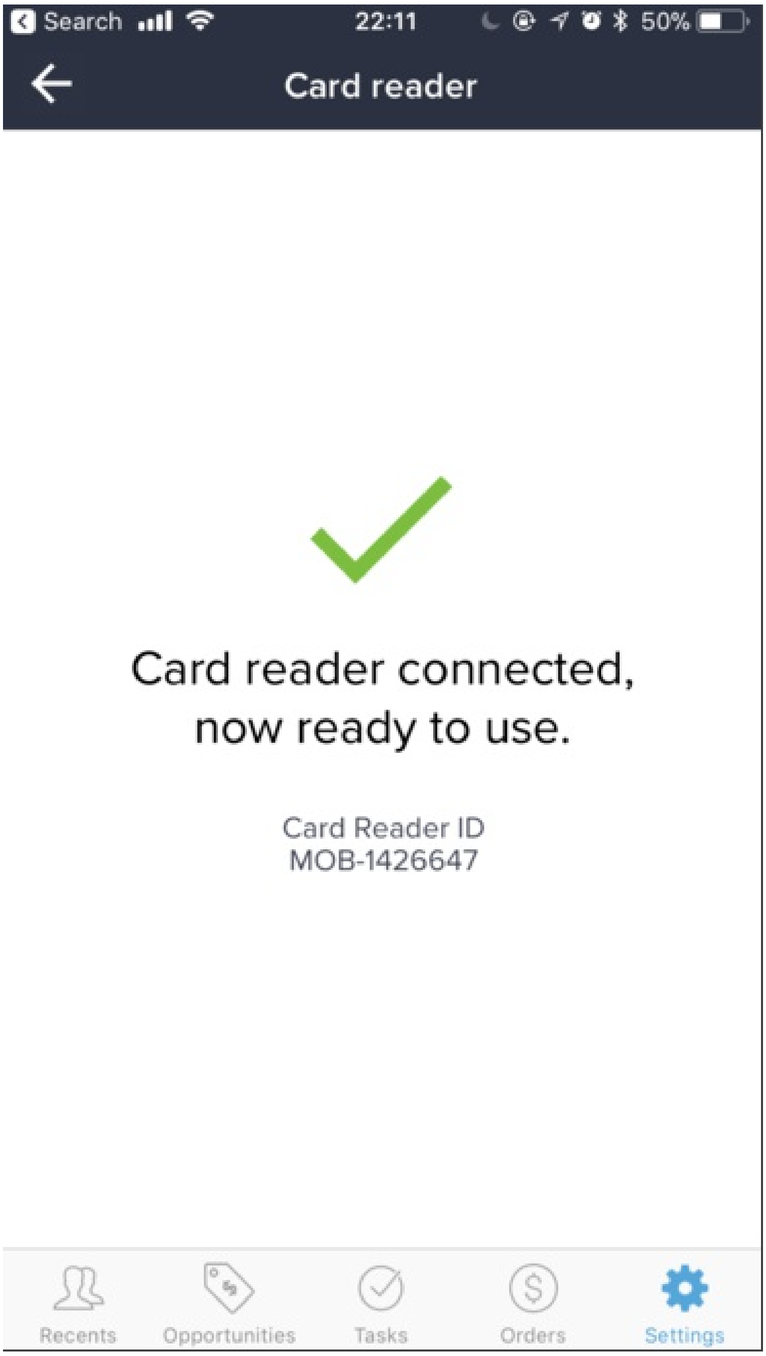
5. Once the reader is connected to the device, a confirmation message will appear. AUDIOJACK is the audio jack reader model connected.


4:18
Card reader
Your card reader is connected and ready to use
Card Reader
AUDIOJACK



MOB-## is the bluetooth reader model connected

6. The Infusionsoft Payments Mobile Card Reader battery level can also be viewed from the card reader settings



FAQs

What devices are supported?

- IOS: requires version 8.0 or higher
- Android: requires version 4.0 or higher

How often does the Infusionsoft Payments Bluetooth reader need to be charged?

- The Infusionsoft Payments Bluetooth reader can be used 200 to 400 times before needing to be recharged.

What do the different LED indicators on the Infusionsoft Payments Bluetooth reader mean?

- Red solid: device is on and has sufficient charge
- Red flashing: device is on, but has low battery; also indicates charging battery
- Blue solid: device connected via Bluetooth
- Blue flashing: device ready to connect, but not yet connected

Is internet access required?

- Yes, internet access is always required to process a payment (Internet access is also required for mag stripe transactions).

How do I allow card present processing in the rare case of a bad chip?

- Swipe is allowed after 3 failed attempts to dip (using the chip). Those 3 attempts and subsequent dip must occur within the same transaction.

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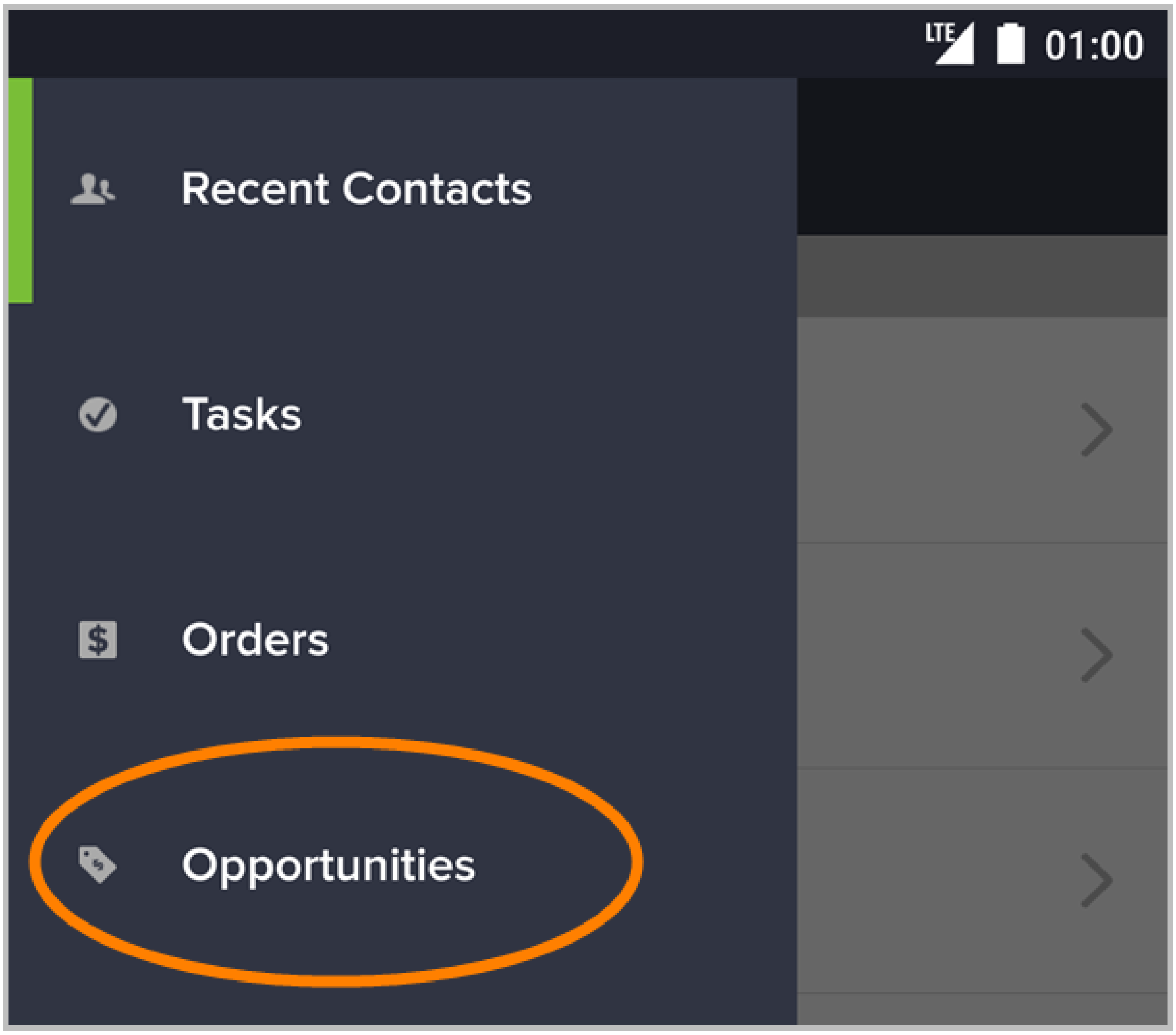
Infusionsoft Mobile Opportunities

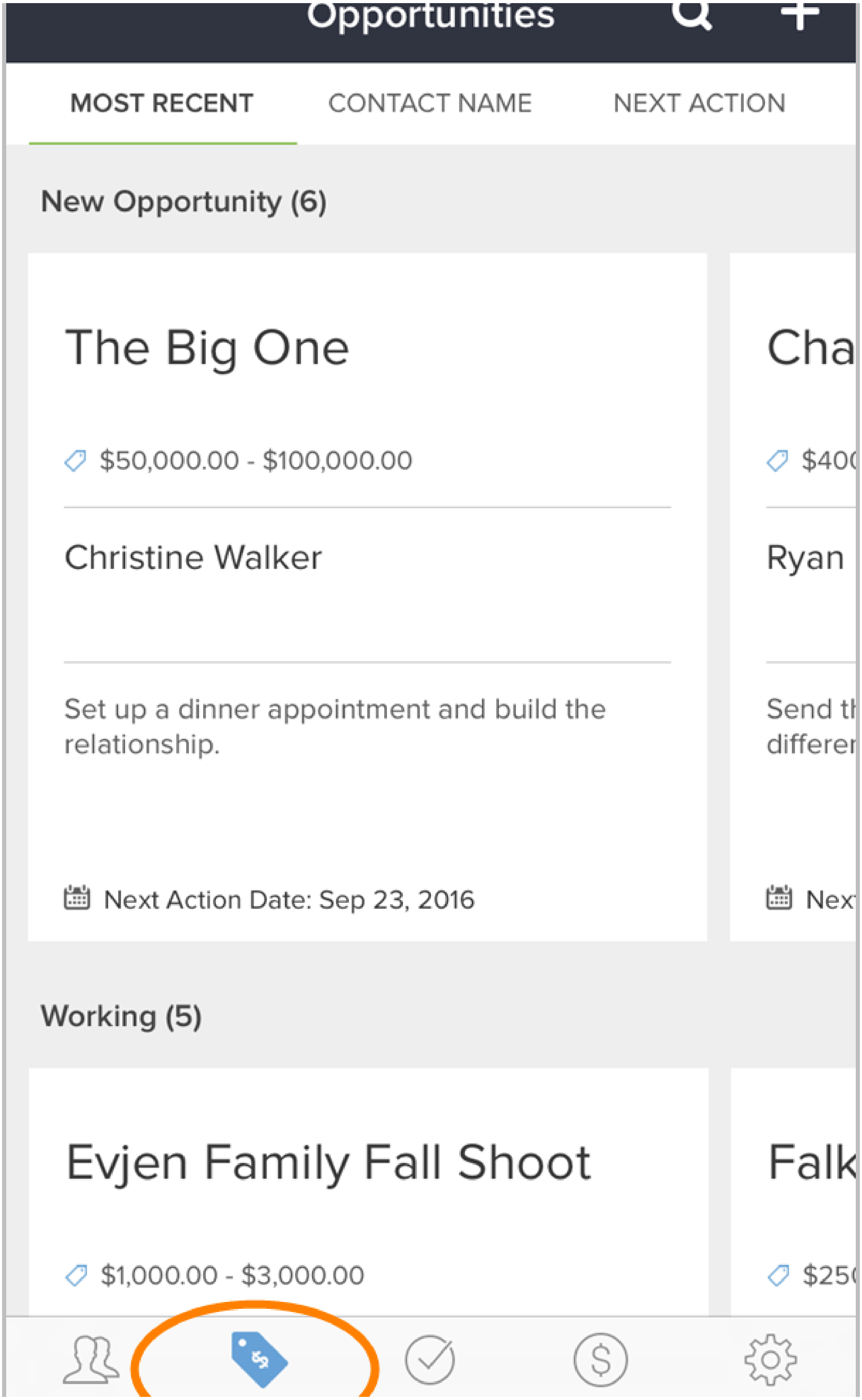
Last Modified on 08/02/2018 3:55 pm MST

For both iOS and Android, there is an Opportunities option. Clicking on that option will take you to your list of opportunities.

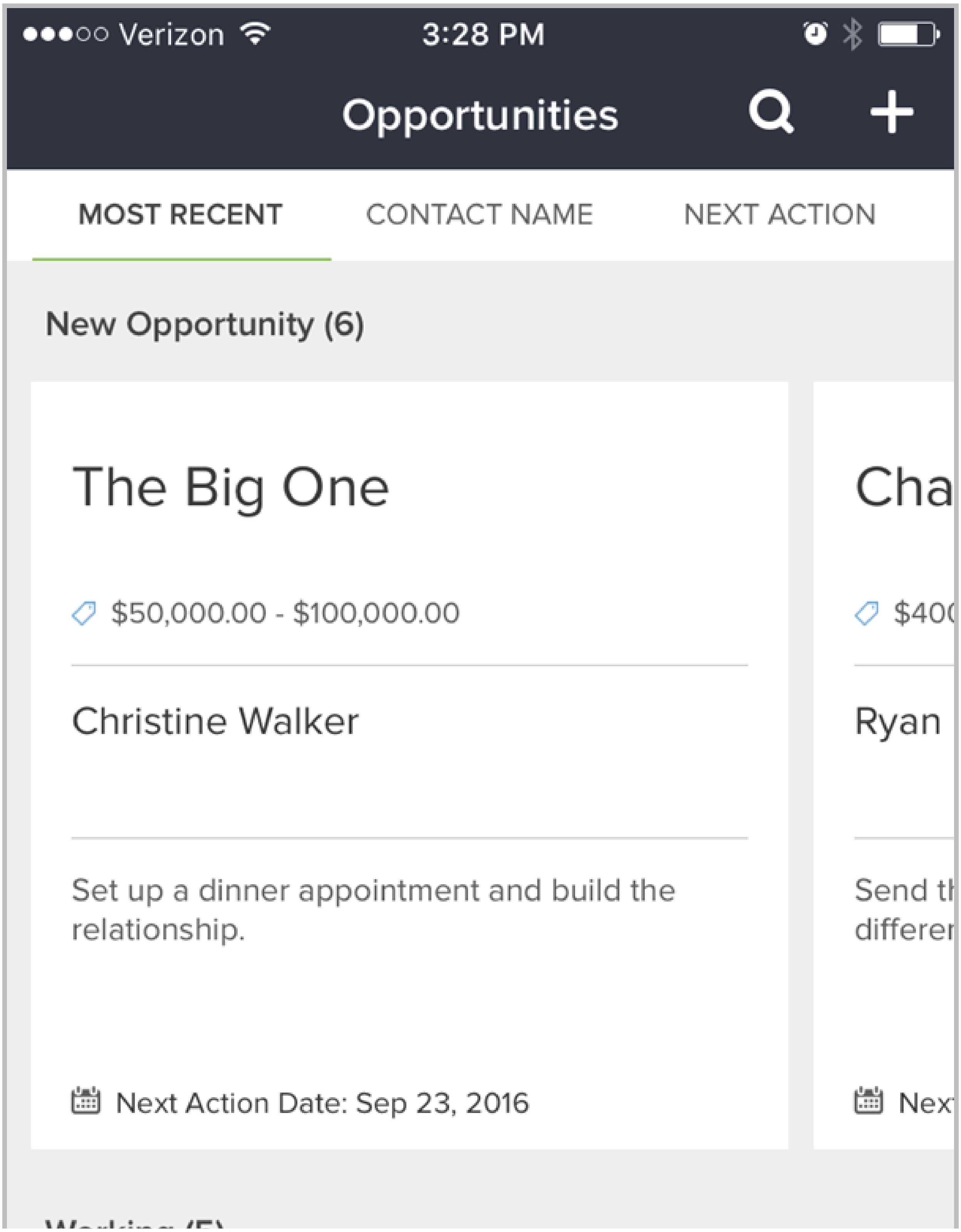
On Android, Opportunities is available in the main menu:

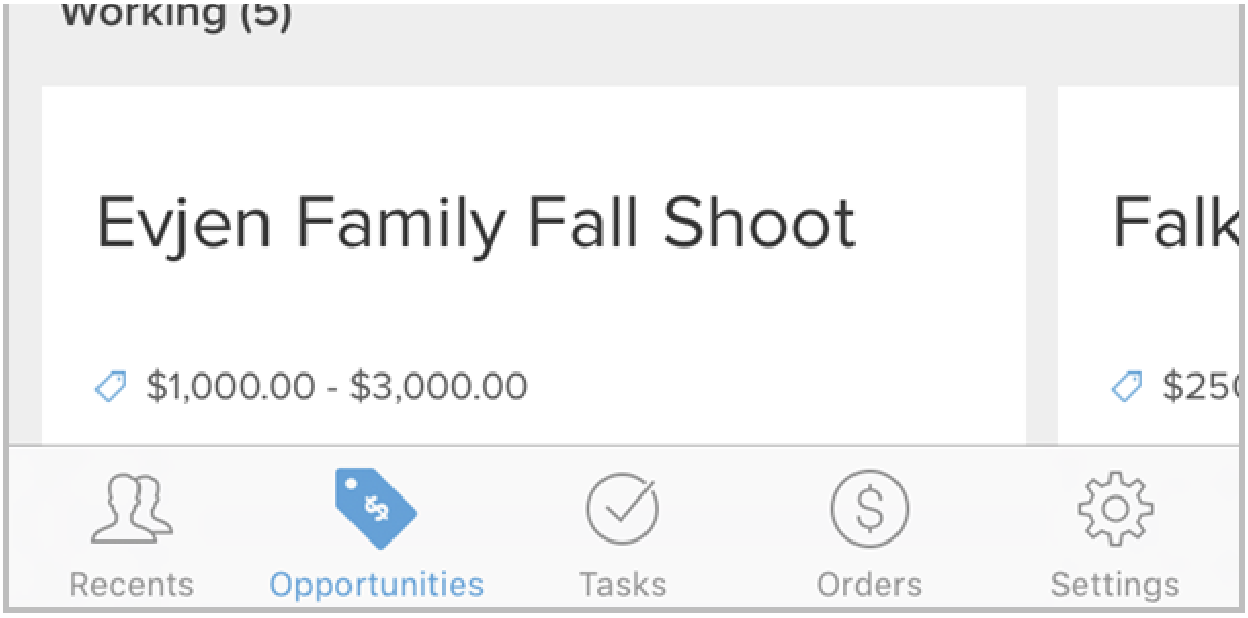


On IOS, Opportunities is now an option in the bottom tab navigation:

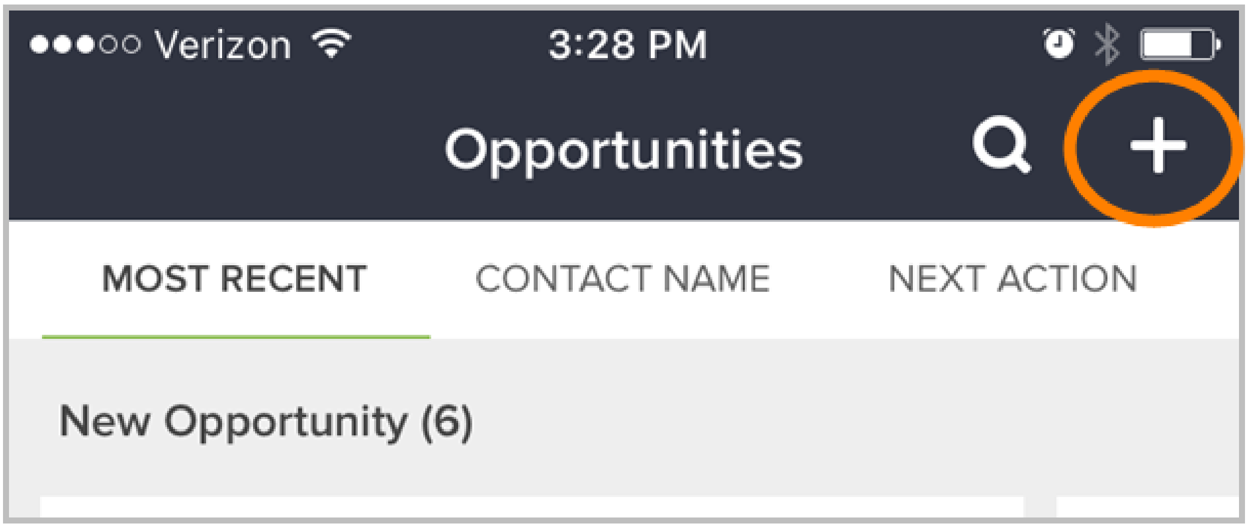

Opportunities
MOST RECENT
CONTACT NAME
NEXT ACTION
New Opportunity (6)
The Big One
$50,000.00 - $100,000.00
Christine Walker
Set up a dinner appointment and build the relationship.
Next Action Date: Sep 23, 2016
Working (5)
Evjen Family Fall Shoot
$1,000.00 - $3,000.00

1. To view your opportunities, just tap **Opportunities** on your device as shown above. If you have opportunities, you'll see them listed here grouped by stage. You can scroll left and right within a stage to cycle through each opportunity in that stage. You can scroll up and down to view more stages.

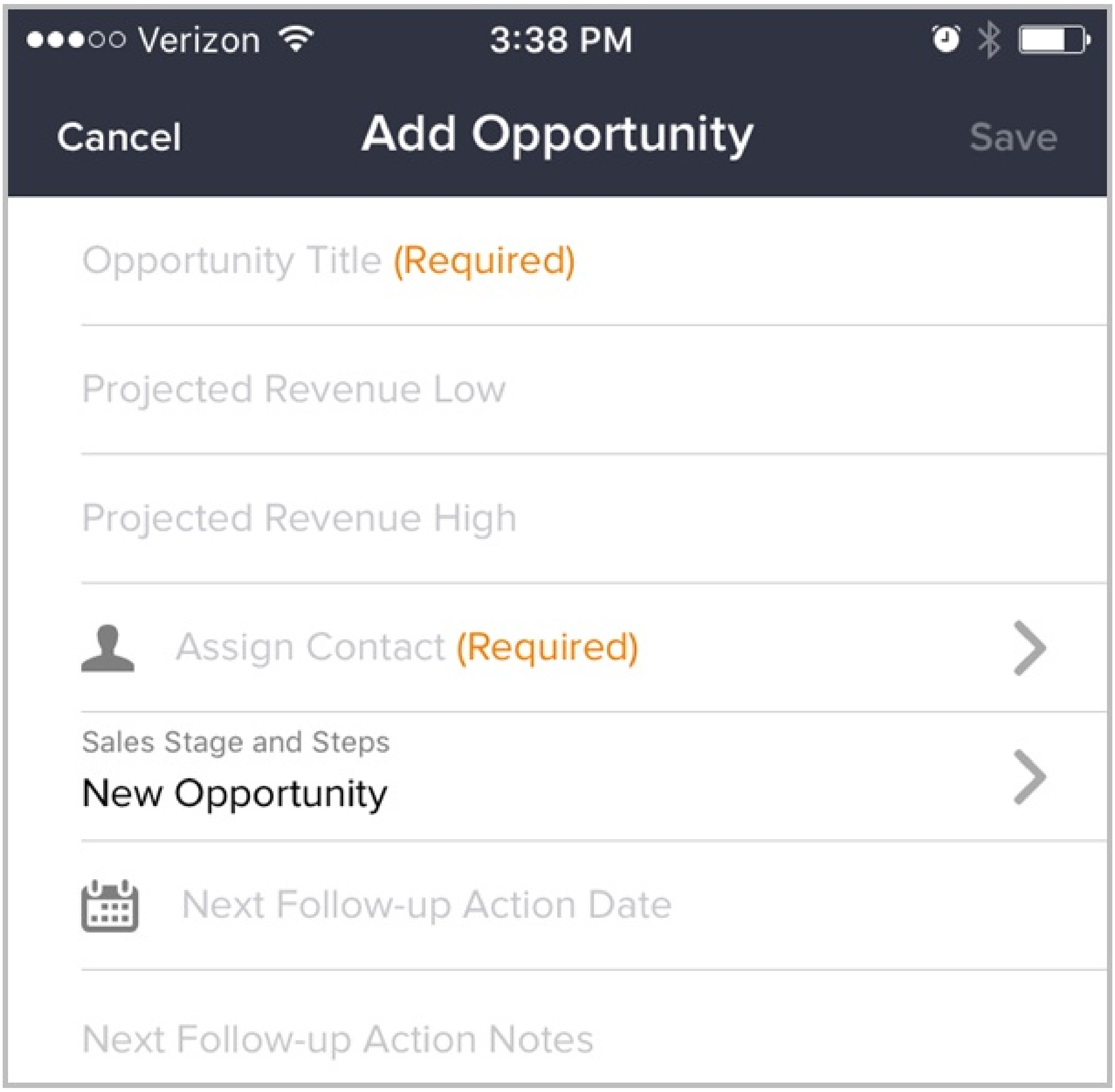




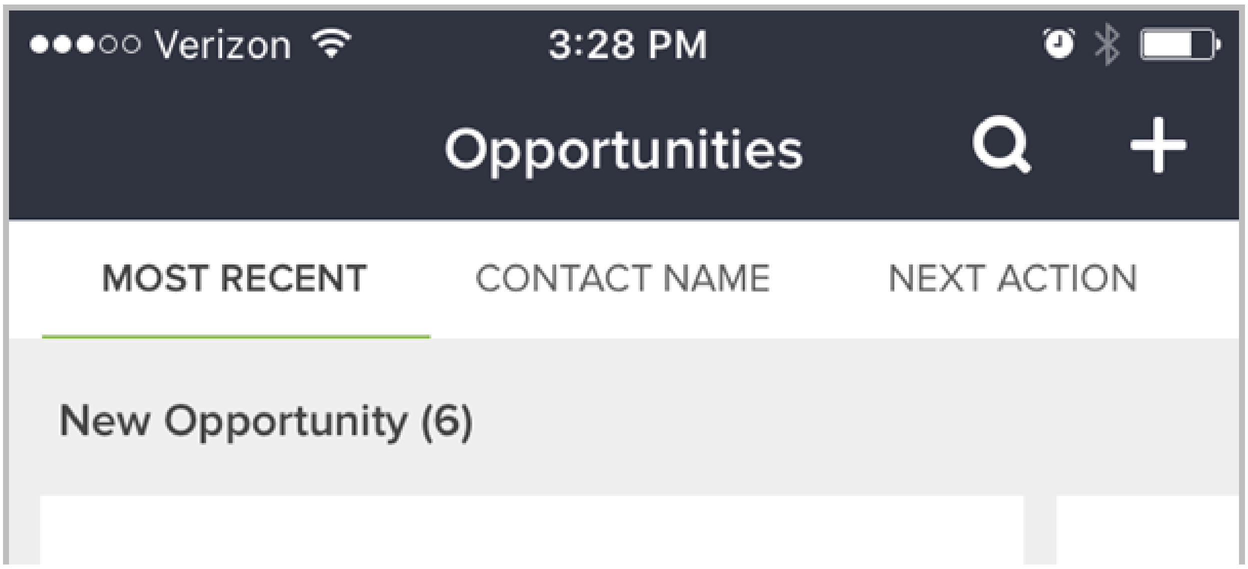
2. To add an opportunity, tap the + button

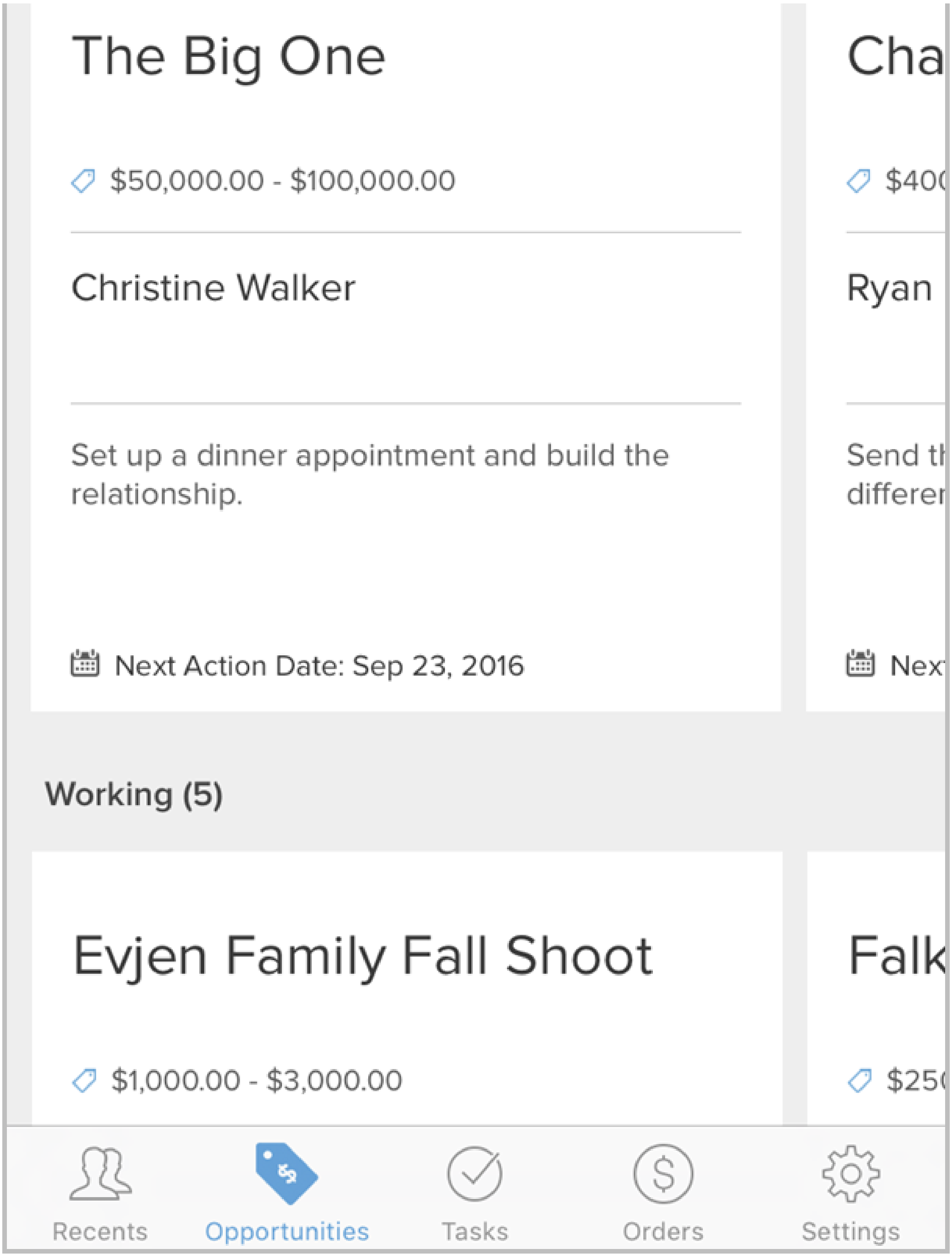


3. Enter the required information: Title, Contact, and Stage



4. Once saved, you'll see your list of opportunities grouped by stage. You can scroll left and right within a stage to cycle through each opportunity in that stage. You can scroll up and down to view more stages.



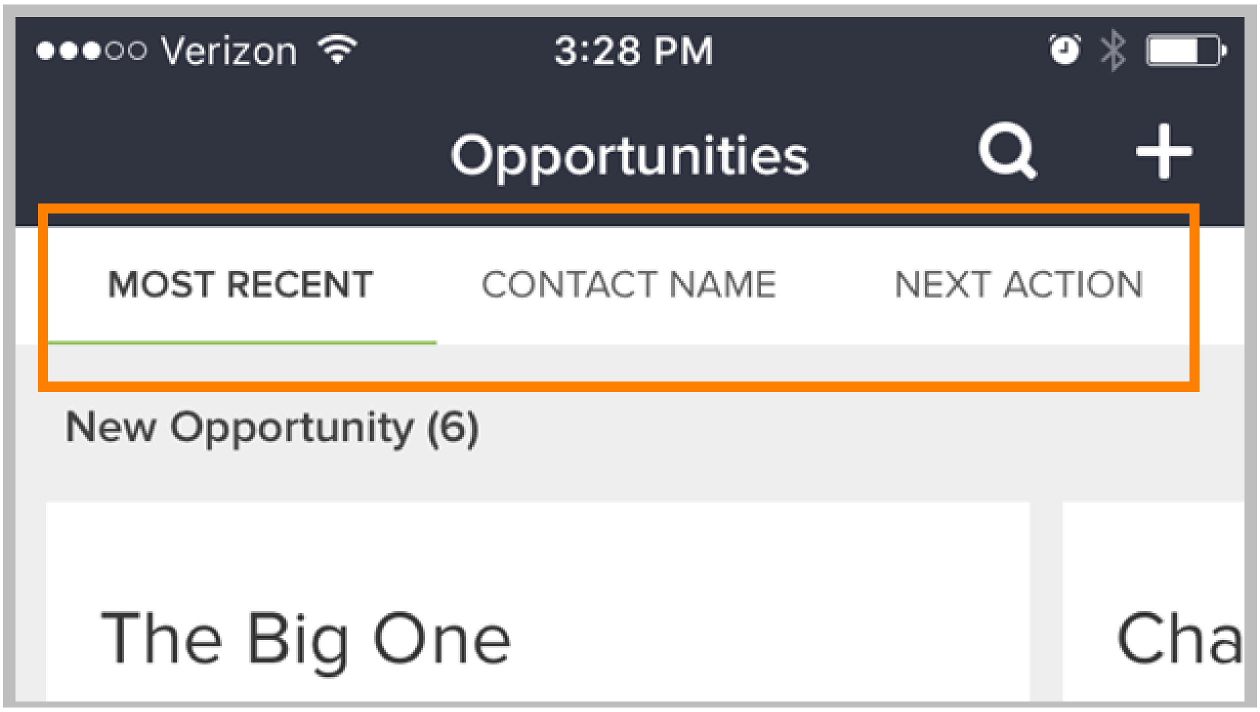


Pro-Tip! There are limits to the number of opportunities that are shown for each stage and the total number of stages:

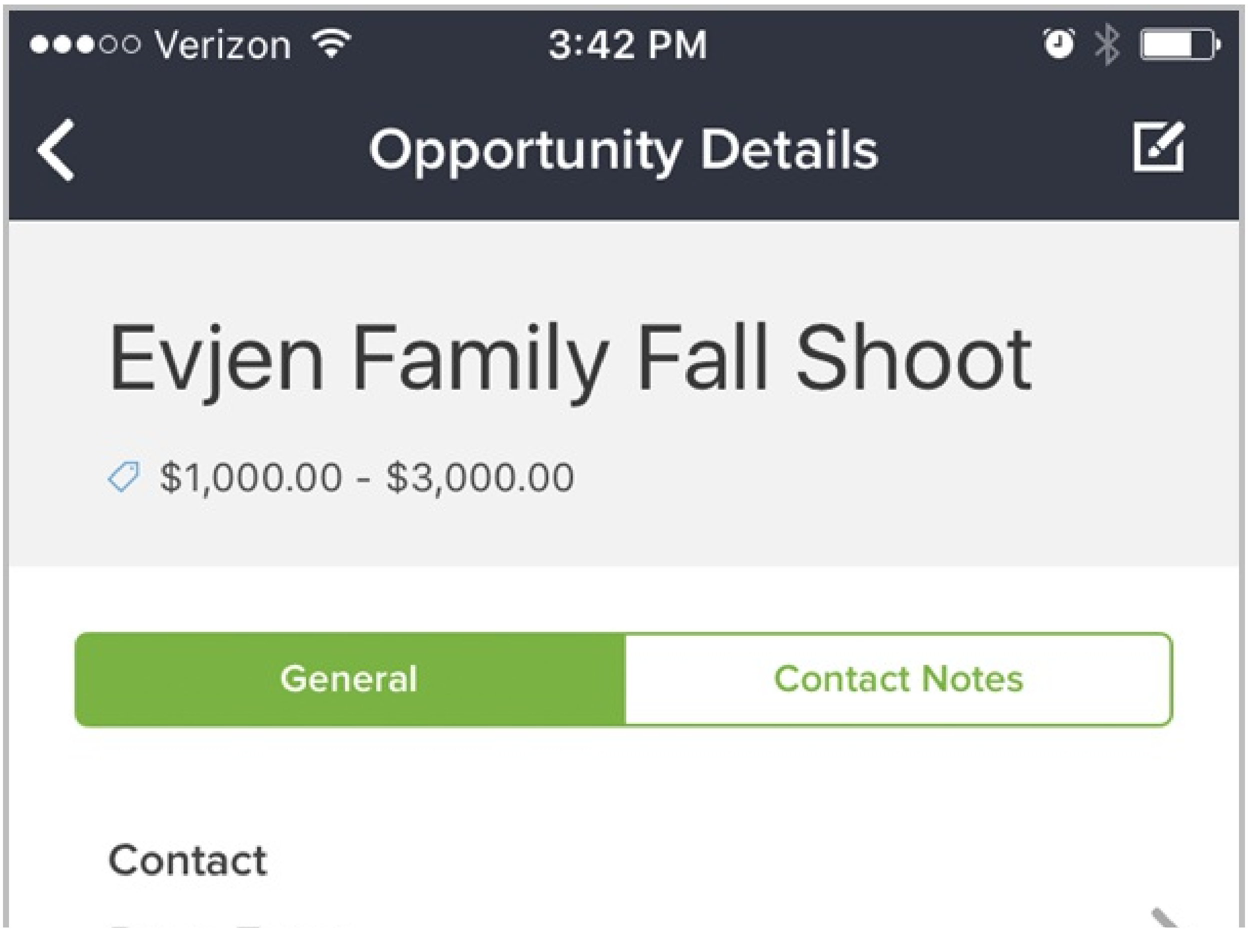
- A limit of 25 opportunities per stage
- A limit of 40 stages

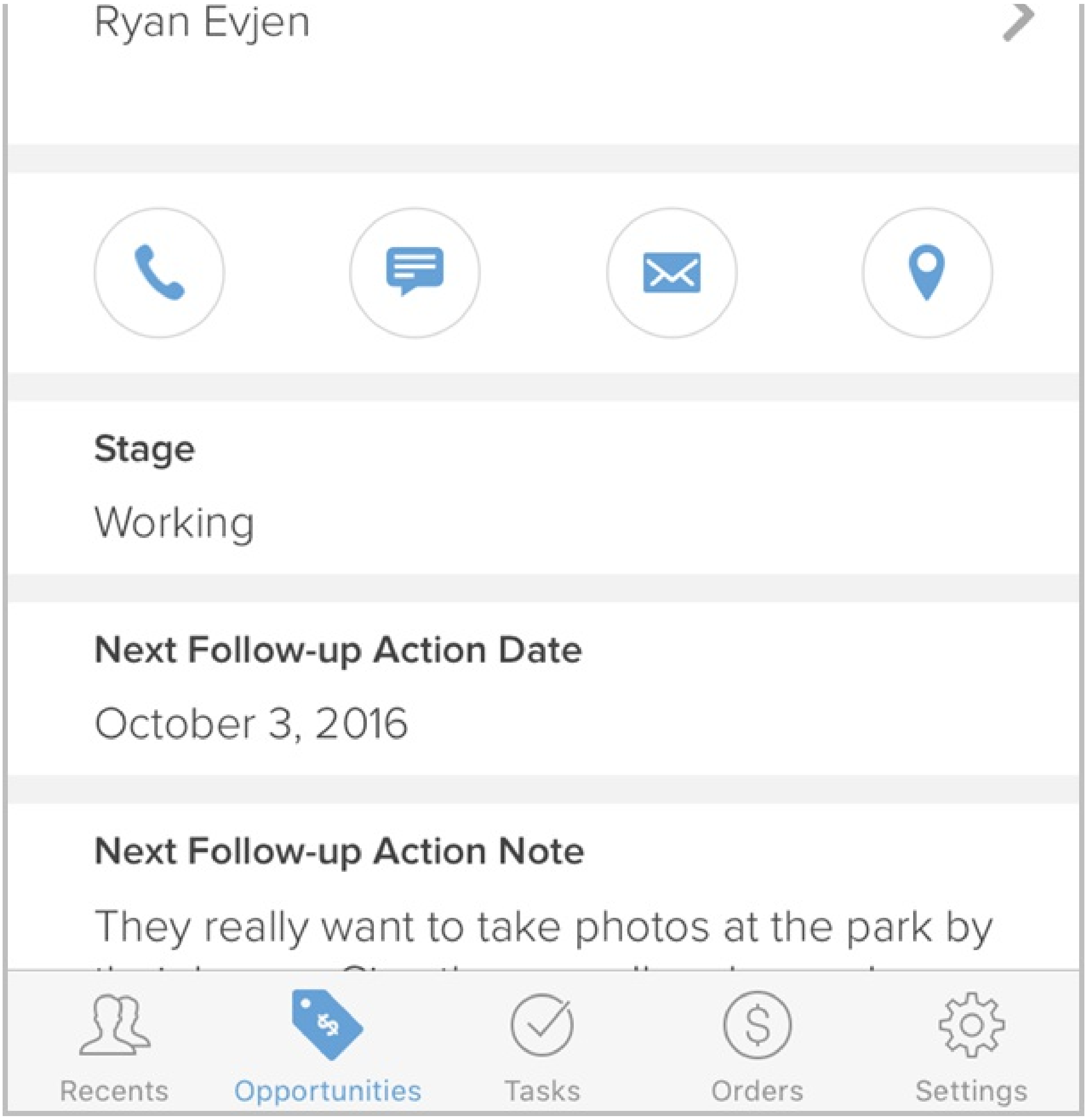
5. You can sort your cards by tapping on one of the sorting options. Selecting one of the

sorting options sorts the cards left to right within each stage: Most recent (most recently used), Contact Name, Next action date (ascending - oldest first.)



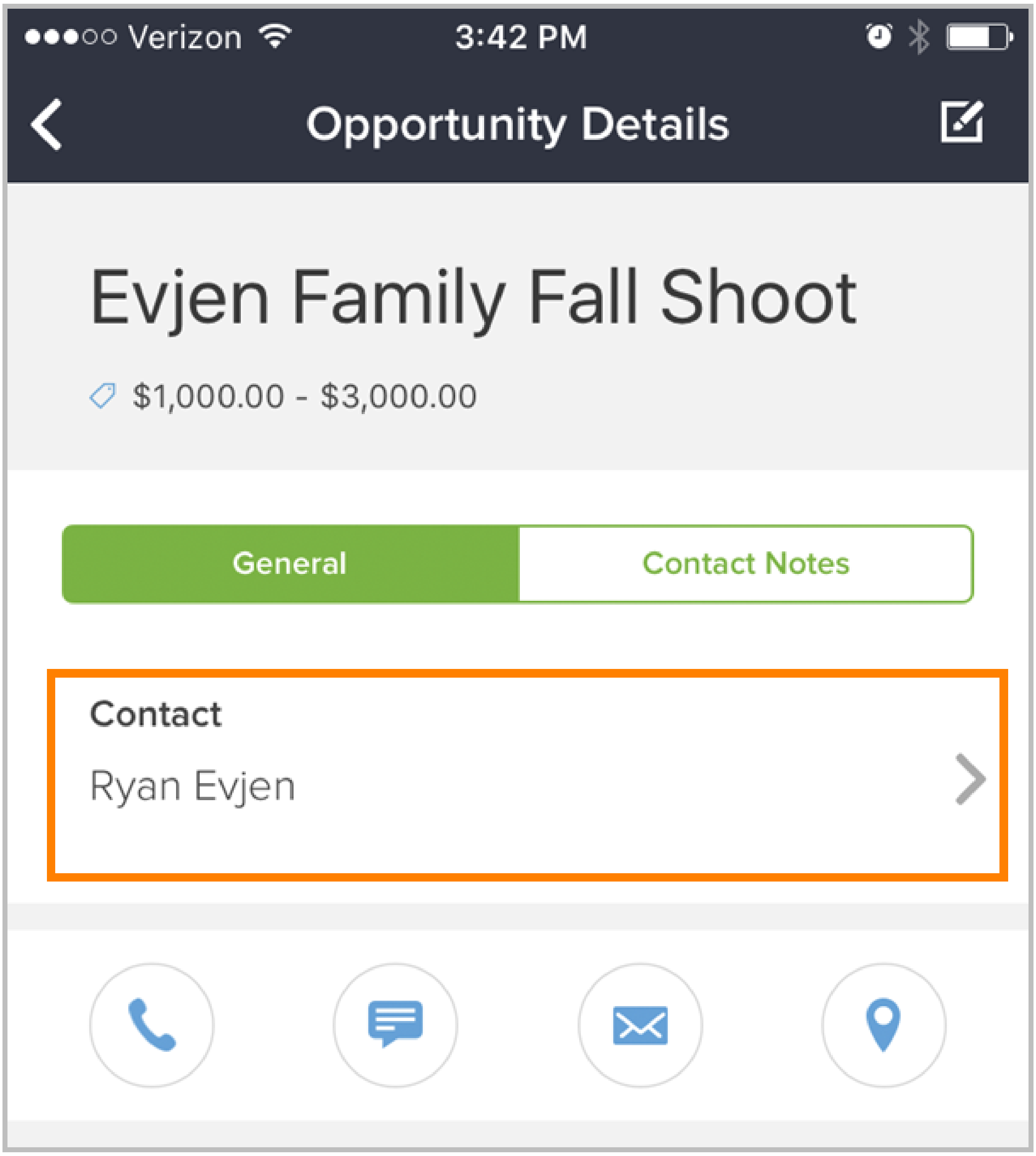
6. Tapping anywhere on the opportunity card will take you to the details of that opportunity. From here, you can view opportunity details and communicate with the contact by tapping icons to call, text, email, or view the contact's address on your map.



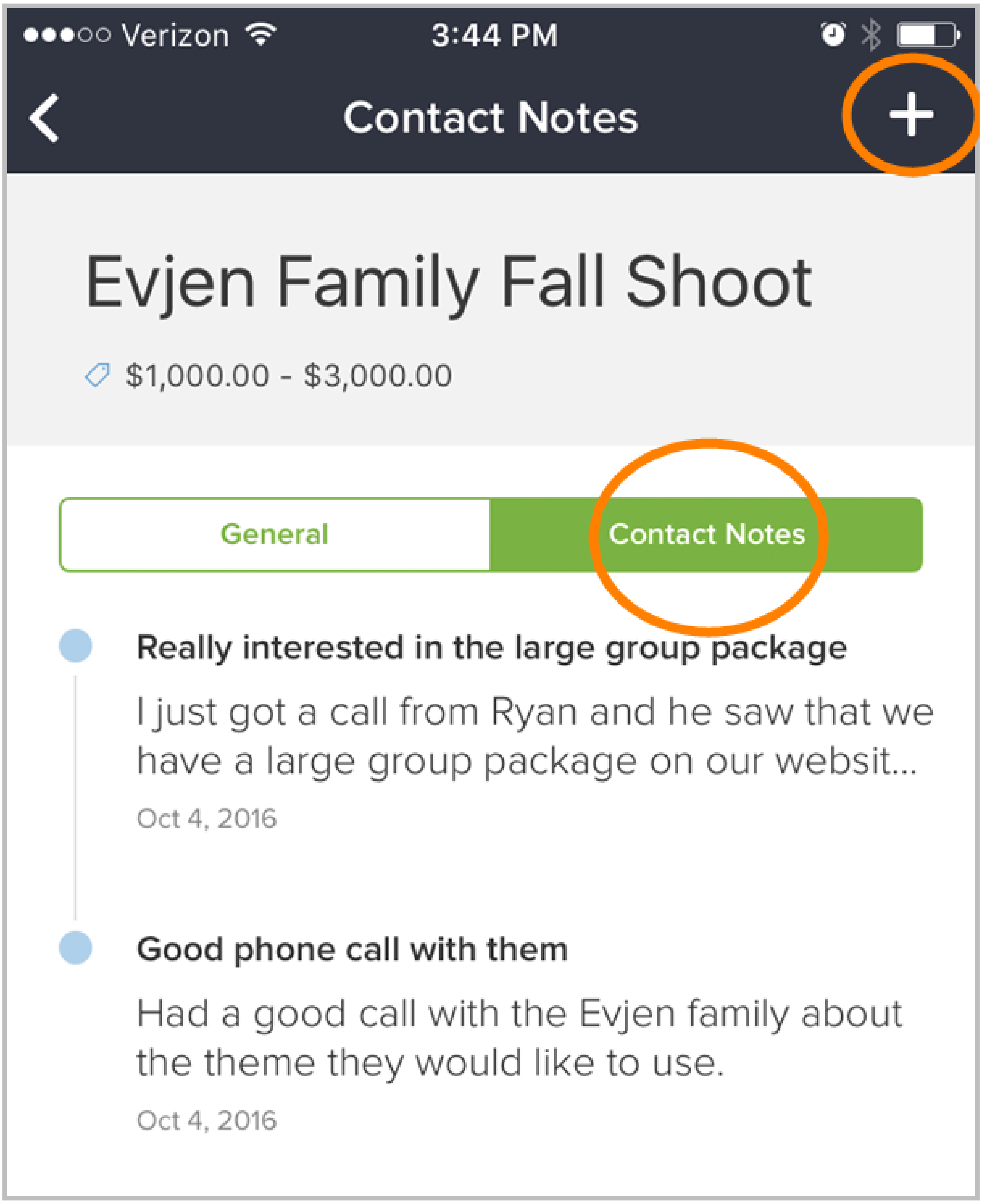


Pro-Tip! If the phone number, email or street address is not found, contact action icons will not be available for that person.

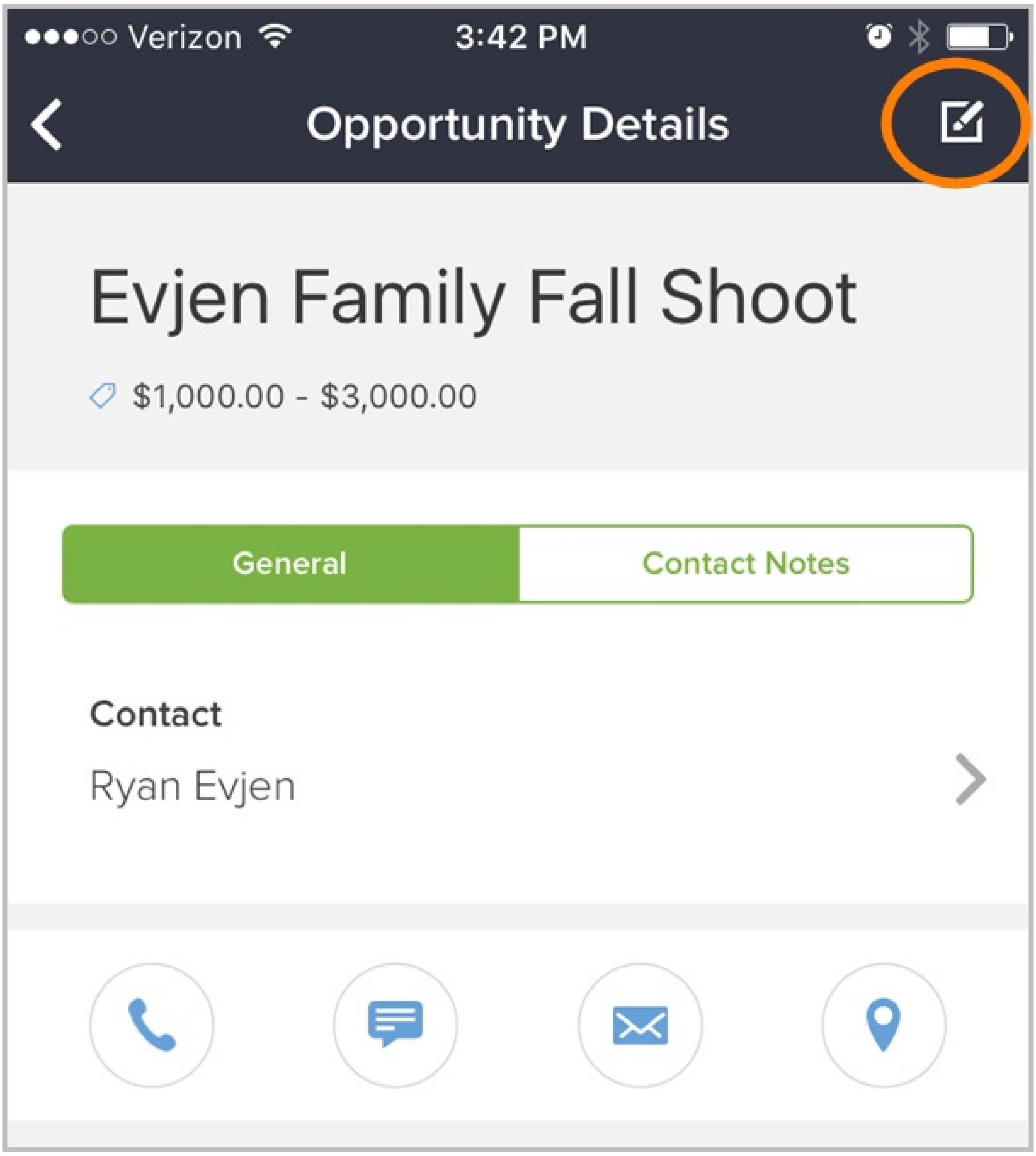
7. You can tap on the contact's name to view the contact record



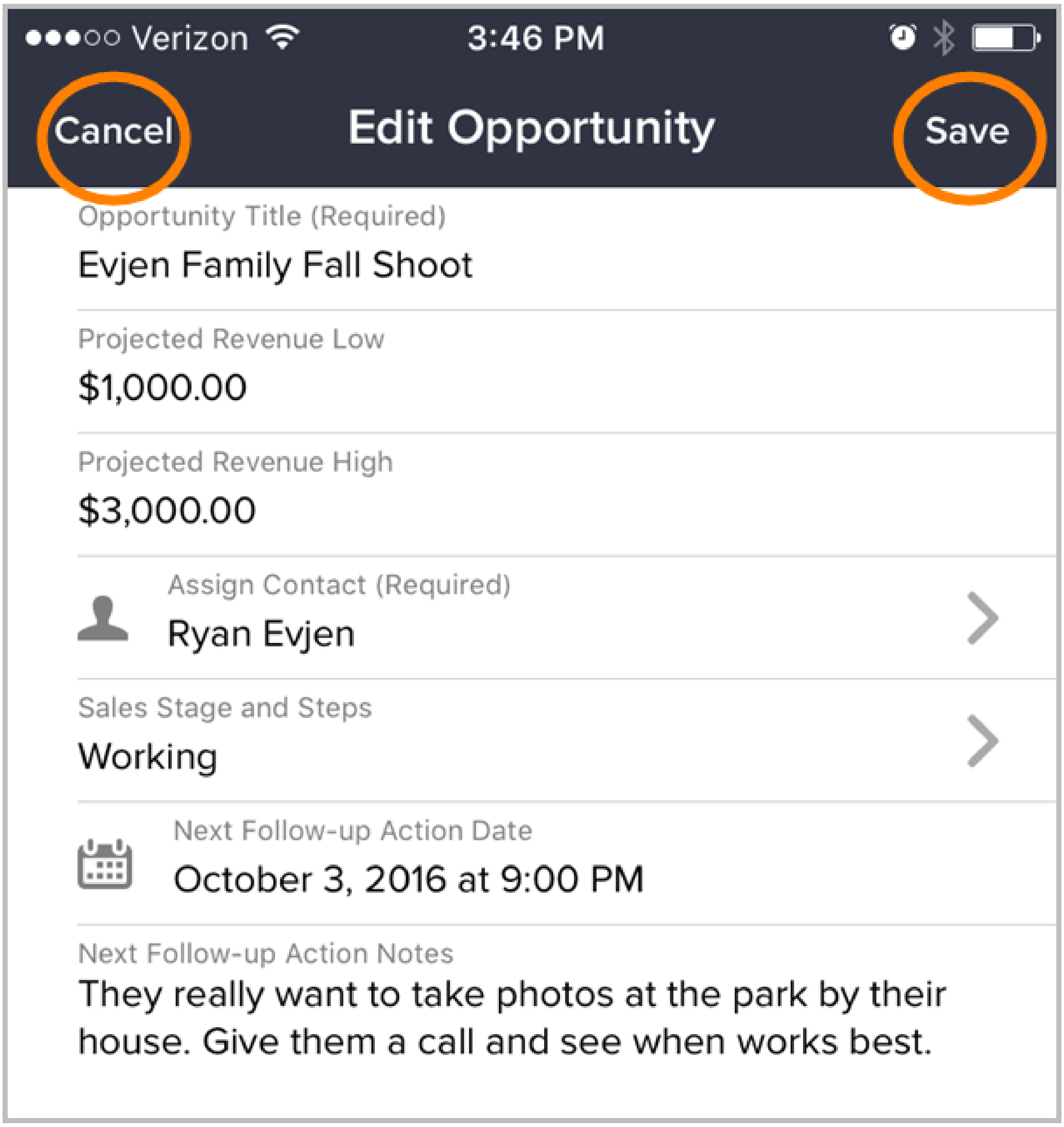
8. Tap the **Contact Notes** button to view and add notes to the contact record



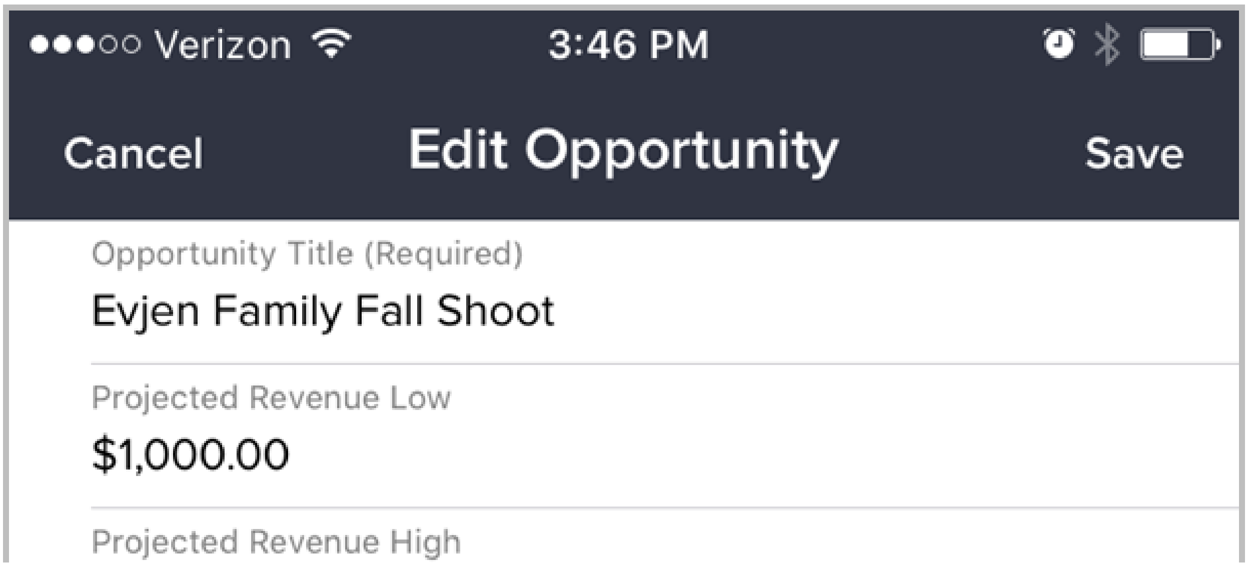
9. To edit any of the opportunity information, click the **Edit** icon at the top right of the opportunity

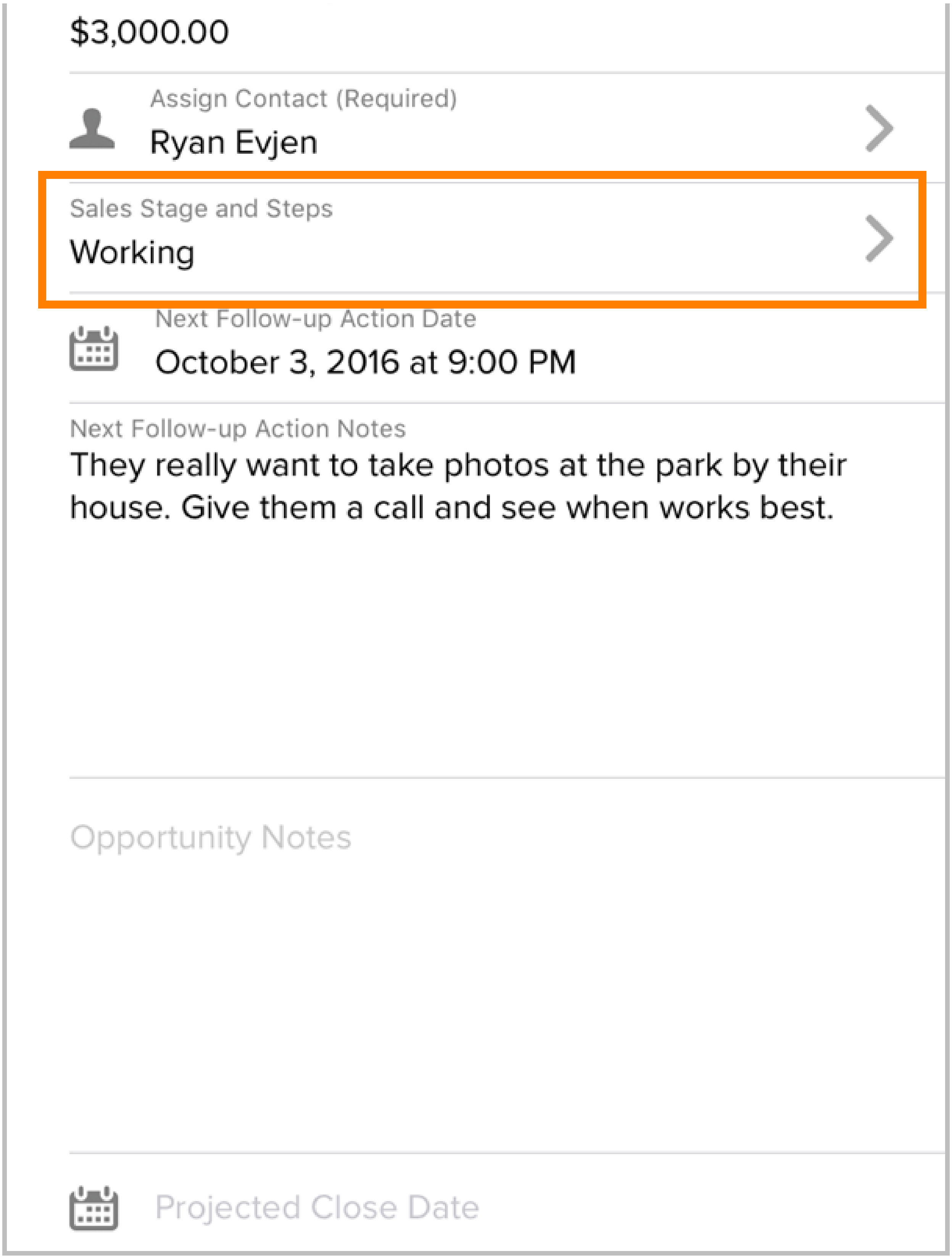


10. Tap any of the fields, make your changes and tap **Save**. Tapping **Cancel** cancels any edits that you have made and takes you back to the opportunity detail screen

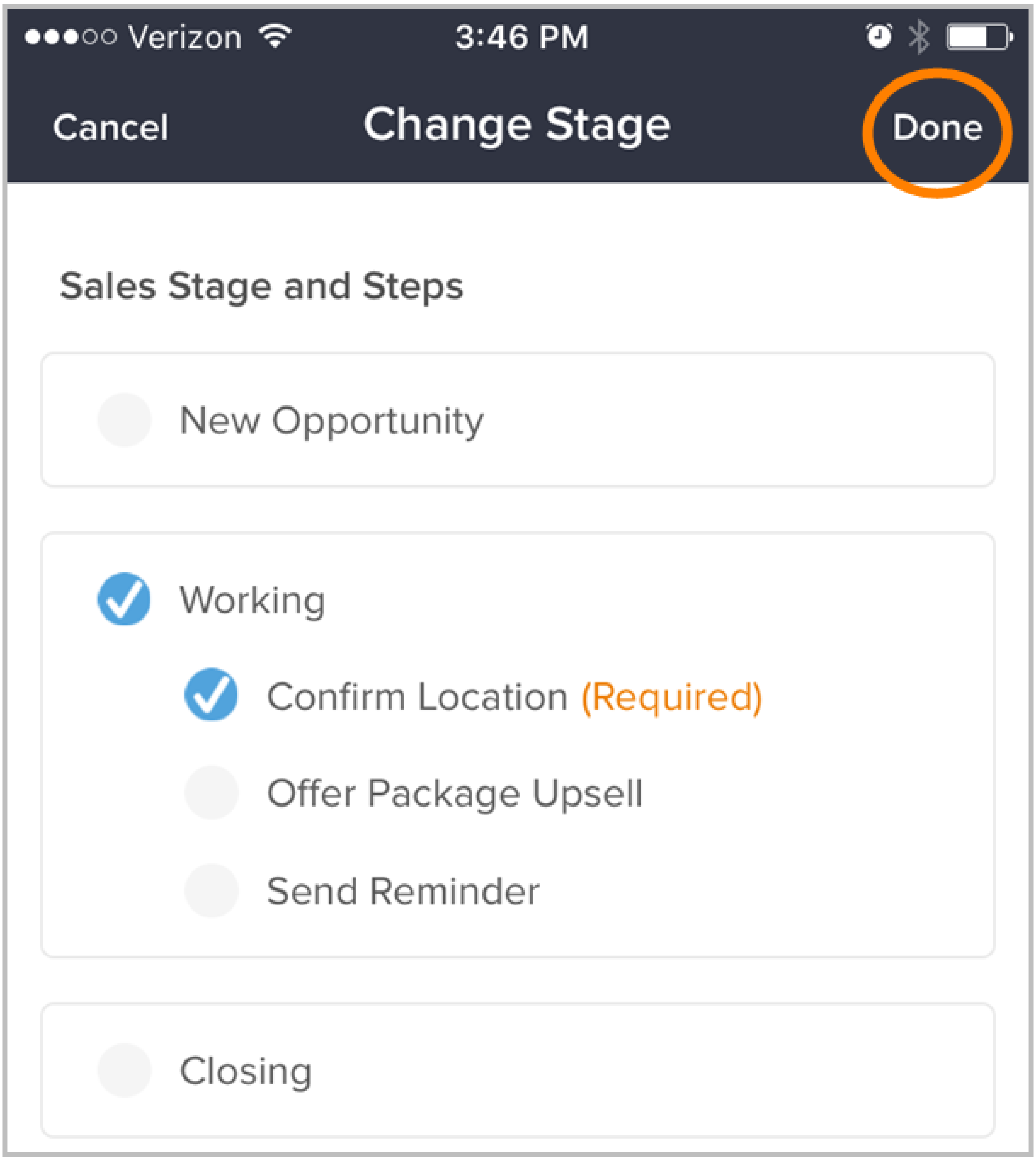


11. To change the stage of an opportunity, tap on the name of the stage



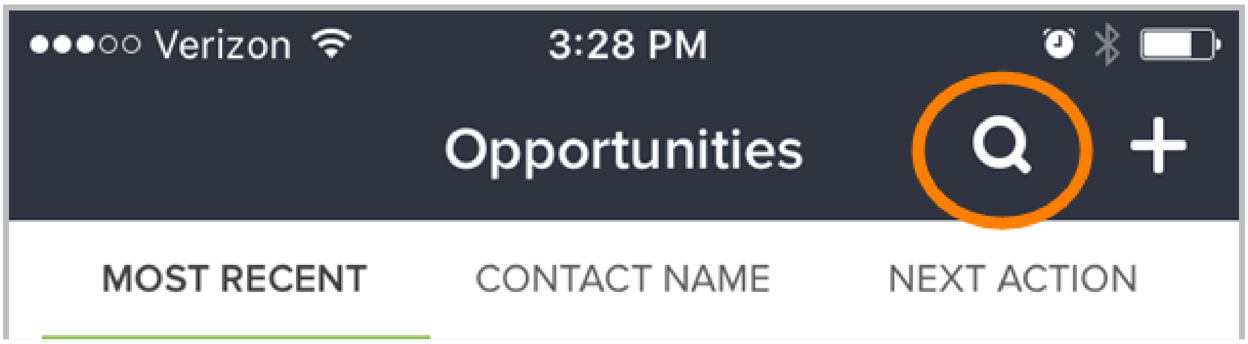


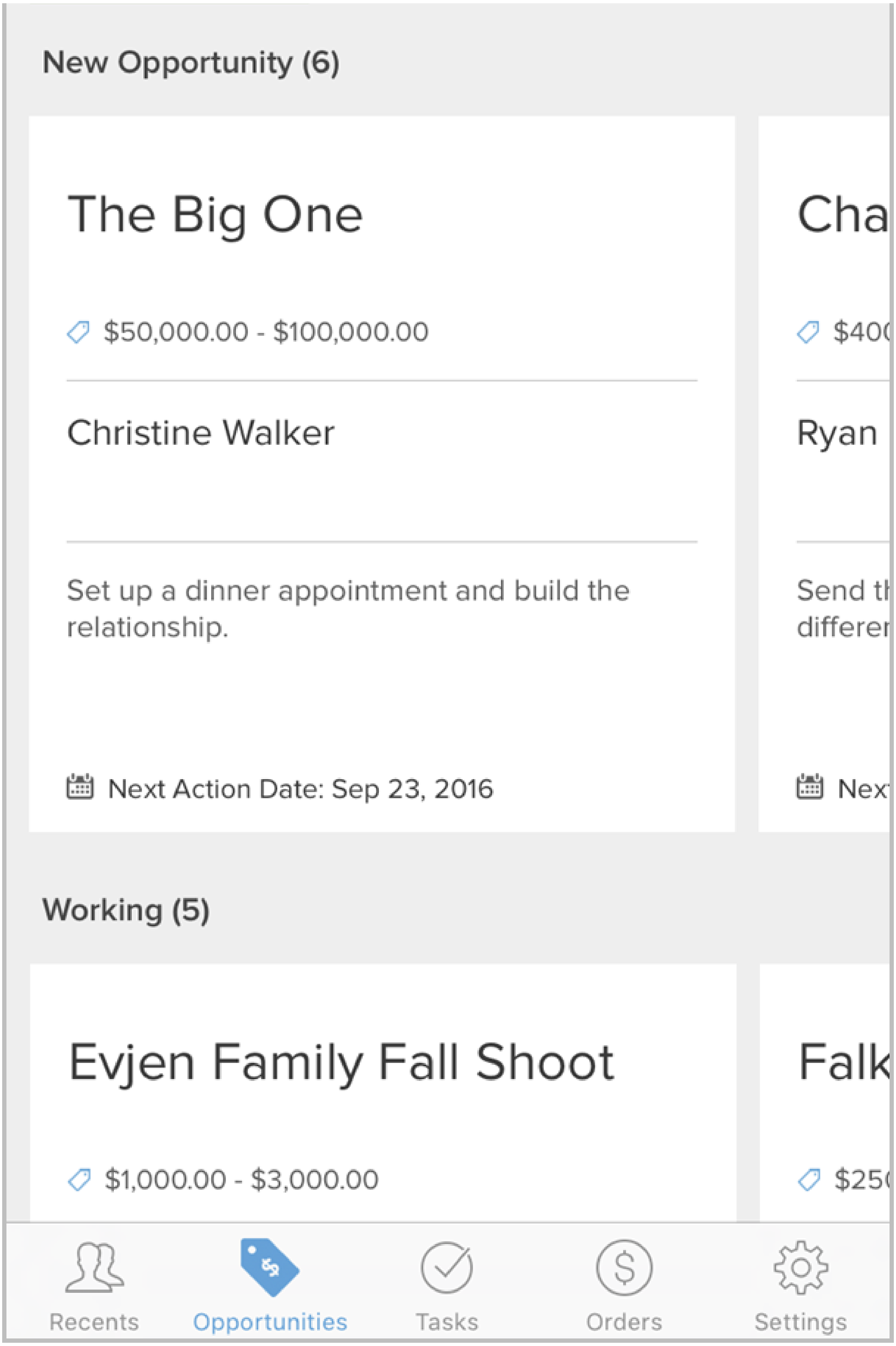
12. Choose the name of the stage and tap **Done**. If a stage has required check boxes, they must be checked before the new stage is active.



Important Note! A stage change is not complete until you tap **Done**.

13. To find an opportunity, go to your opportunity list and tap the**magnifying glass** icon. You can search by opportunity title name or contact name.




New Opportunity (6)
The Big One
$50,000.00 - $100,000.00
Christine Walker
Set up a dinner appointment and build the relationship.
Next Action Date: Sep 23, 2016
Working (5)
Evjen Family Fall Shoot
$1,000.00 - $3,000.00
Recents
Opportunities
Tasks
Orders
Settings

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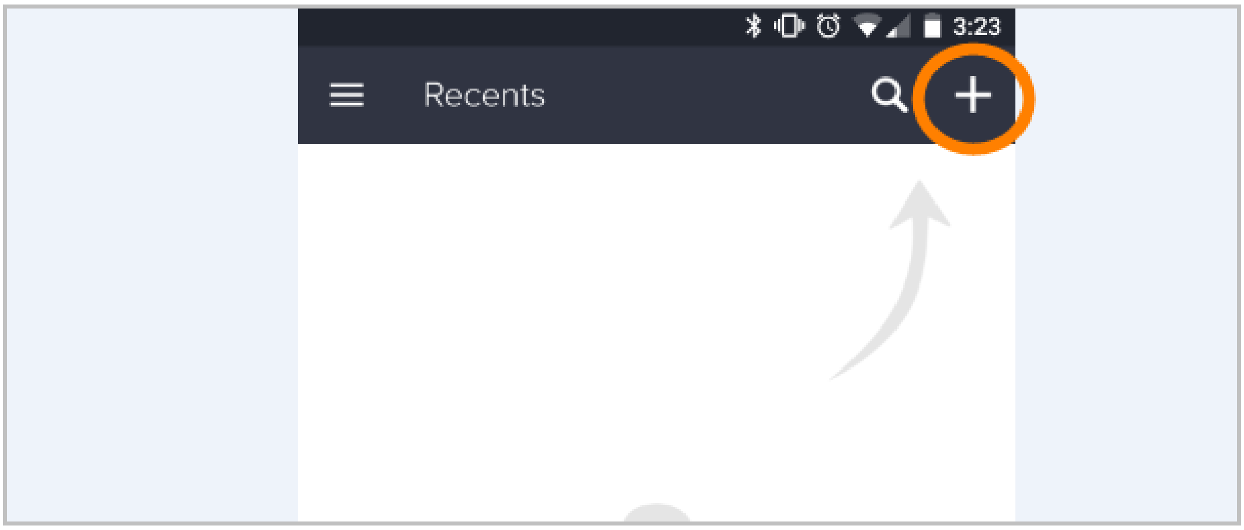
Business Card Transcriber

Last Modified on 08/02/2018 3:55 pm MST

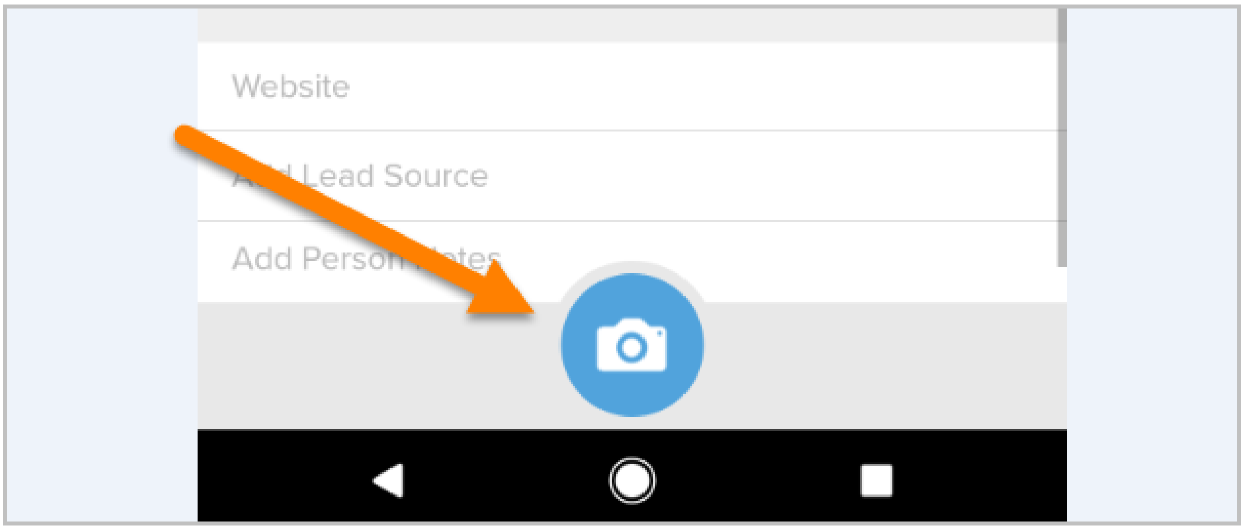
You can now add a contact to Infusionsoft just by snapping a picture of their business card. From the **Add Contact** screen, there is now a camera button which takes you to a guided flow to Snap a business card. Once the card has finished processing, you will receive a notification to review the information and add the new contact.

Please Note! Each user in your Infusionsoft account can upload up to 250 contacts per 30 days. The 30 day count starts when the first snap taken.

1. Click the **+** button to begin



2. Click the **Camera** button



3. Focus the camera on the business card, and take the picture

4. Review card quality and tap **Use**

5. Await processing of card - This process will take 15 minutes to 2 hours

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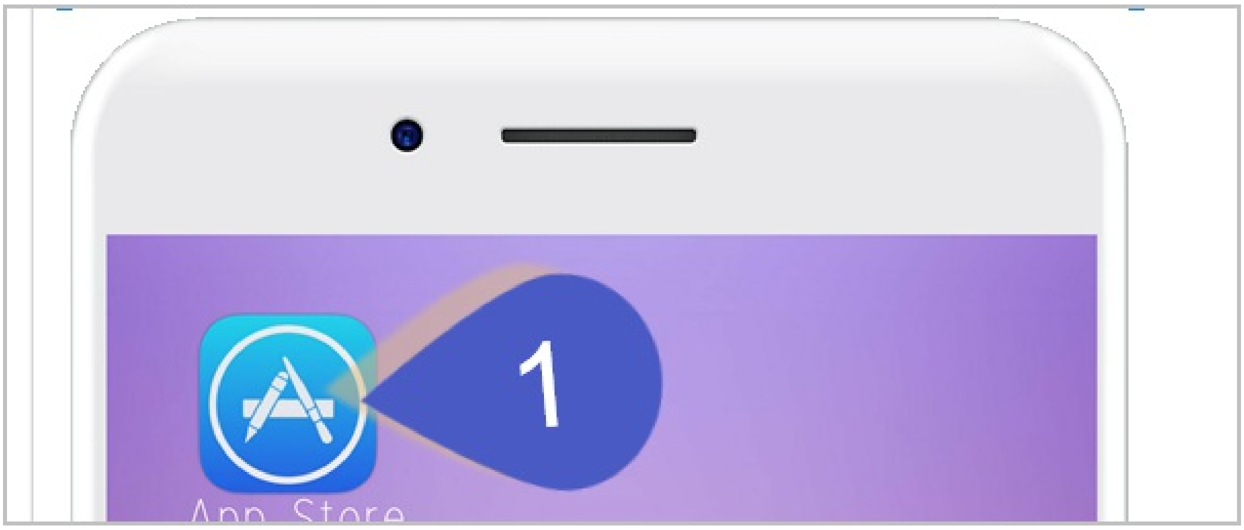
How To Update Your Infusionsoft Mobile App

Last Modified on 08/02/2018 3:56 pm MST

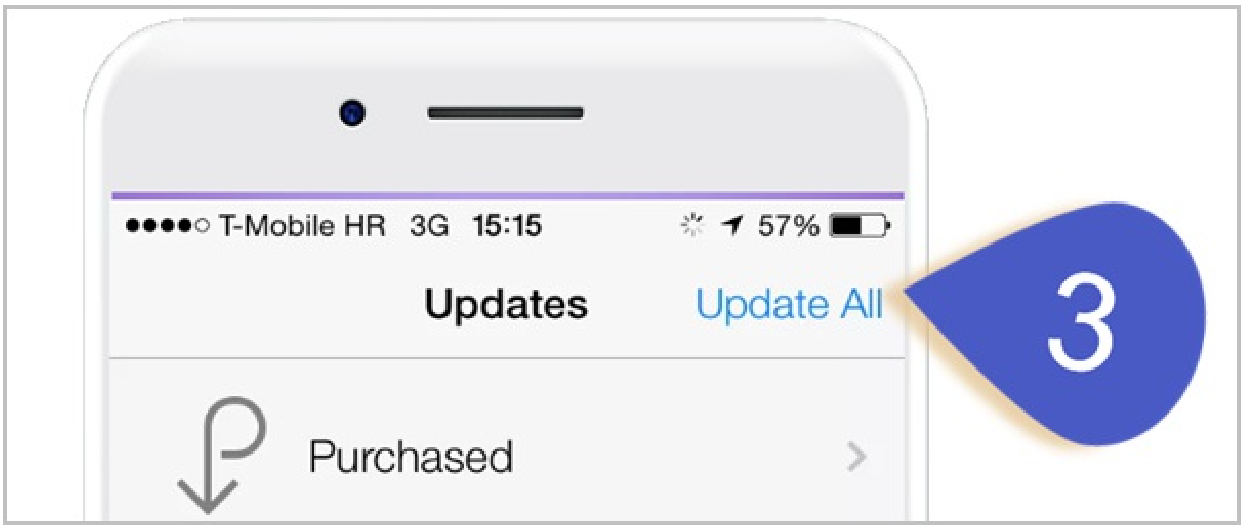
To update your Infusionsoft app if you are using Apple's iOS:

1. Go to your iPhone's home screen and tap on the App Store icon.



2. After the App Store opens, tap the **Updates** icon in the bottom right corner of the screen.

3. Tap the **Update All** button at the top of the screen.



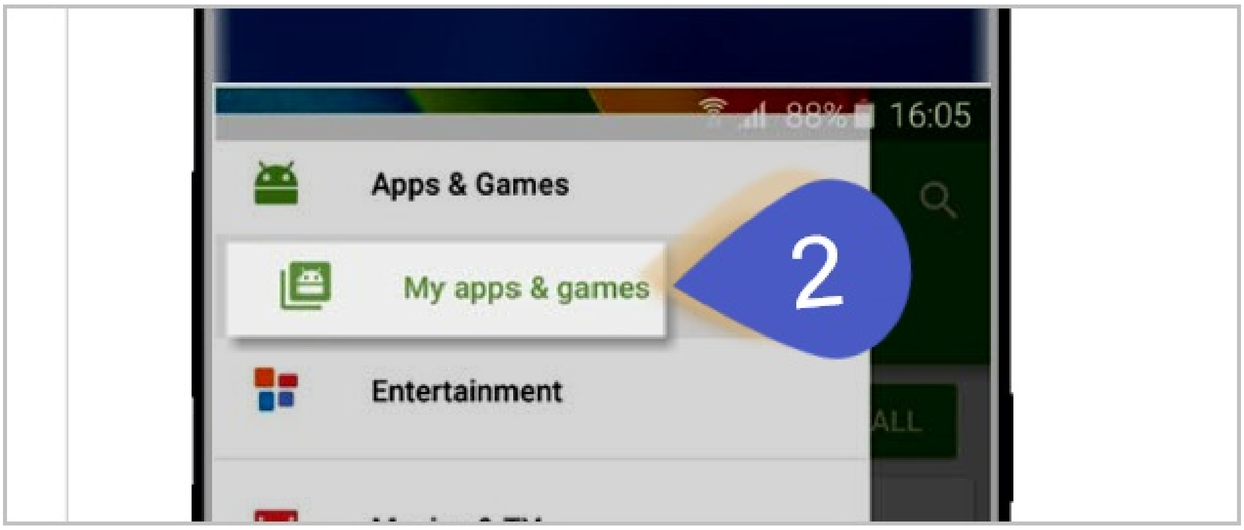
4. You might be asked to enter your password

5. Wait for your apps to update.

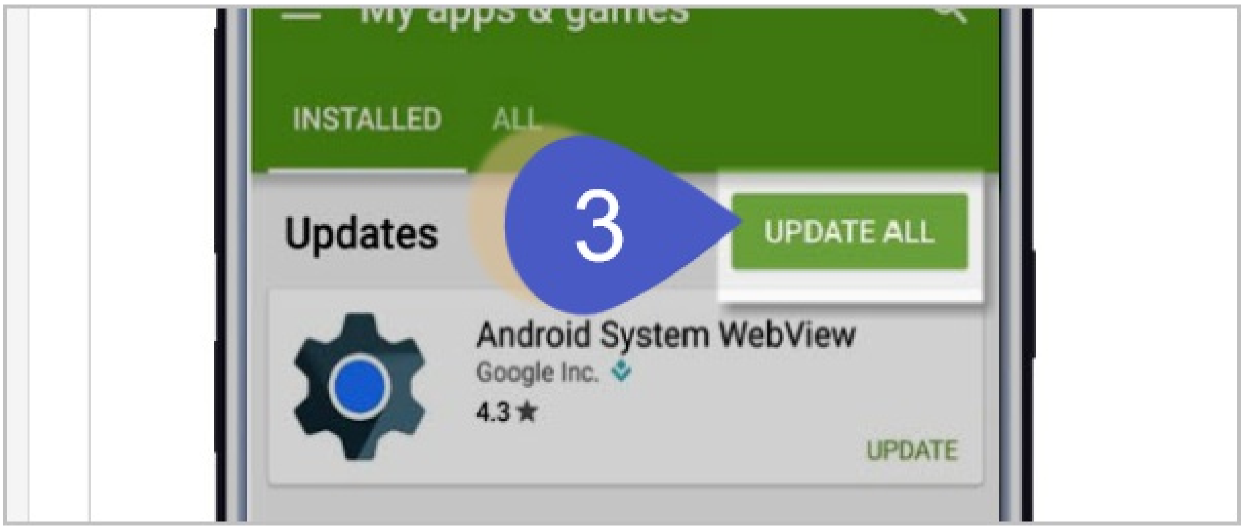
To update your Infusionsoft app if you are using Android:

1. Open the Google Play Store app

2. Go to **My apps & games**



3. Click **Update all**



Tip: In some cases, you may need to restart your device to update an app.

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EMV Chip Card FAQ

Last Modified on 08/02/2018 3:56 pm MST

What is EMV?

EMV credit cards house a computer chip that makes the card very difficult to counterfiet. Traditional magnetic stripe cards are very susceptible to fraud. Most of Europe have been using EMV technology for years. The United States is the one of the last markets to adopt EMV technology over magnetic-stripe cards. EMV stands for "Europay, MasterCard, and Visa."

What is the “liability shift”?

Right now, if you run a fraudulent cart, banks absorb the cost. Starting October 2015, if someone pays with a fraudulent chip card, and you didn’t use an EMV card reader to process the transaction, the bank is no longer liable. You can protect yourself from liability by processing chip cards with an EMV reader instead of a magnetic stripe reader.

Why does Infusionsoft only offer EMV chip readers?

While bigger businesses may be able to absorb fraud, a single fraudulent charge could be a serious blow to a small business. We offer only EMV chip readers so you are protected. Our readers come with the ability to read magnetic stripes if needed, and EMV capabilities for all EMV chip cards.

Is EMV a new technology?

No, most of the world, has been using EMV chip cards for years.

How do you process EMV chip cards?

Instead of swiping, to process an EMV chip card, you “dip” the card in the device. The card is left in place during the transcation so the chip and the reader can communicate. These transactions take a little bit longer than transactions with a magnetic stripe reader.

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CustomerHub Overview

Last Modified on 08/02/2018 3:57 pm MST

CustomerHub is a hosted application that allows you to create a password protected website that integrates with your Infusionsoft application. CustomerHub provides front-end access to members and customers, while Infusionsoft houses the back-end database of contacts, orders, and billing data. Click here to get CustomerHub.

CustomerHub is commonly used by small businesses to...

- Deliver restricted content (training, documents, videos) to site members who are paid or free subscribers. CustomerHub controls access to content through Tags and Subscriptions assigned to a Person Record in your Infusionsoft application.
- Create a customer portal so that your customers can manage their accounts online. CustomerHub synchronizes billing and account information with your Infusionsoft application so that the updates your customers make through CustomerHub automatically update Infusionsoft.

CustomerHub is an ideal membership site / customer portal solution for businesses that want to add a subscription product or service to their current offerings or fully transition to a subscription-based business model. The tight integration with Infusionsoft allows you to control content delivery and increase account management efficiency by automating member management from sign up, to access permissions, to collections and upgrades. CustomerHub gives your business the ability to support a larger number of site users without increasing the workload for your existing staff members or adding new ones.

With a CustomerHub portal, you can...

- Automatically create new member profiles in CustomerHub, generate a unique password, and give instant access upon sign up.
- Filter page content displayed to logged in users based on predefined access permissions. Permissions can be used to deliver targeted content to employees, partners, and membership program customers.
- Deliver sequential content that is unlocked based on a specific schedule or upon completion of a previous module.
- Host and deliver multimedia content, such as video, audio, and digital files (documents, PowerPoint, product files, and more) to keep your members engaged.
- Increase program signups through integrated Facebook sharing tools.
- Retain customers longer by creating an interactive community atmosphere.
- Keep customer contact records up to date by giving members the ability to manage their own accounts.
- Automatically disable access to content for delinquent accounts or reactivate members when they resolve the related billing issues.
- Send automated follow-up notifications to customers with failed auto-charges or expiring credit cards and make it easy for them to manage their credit card information and billing preferences through CustomerHub.
- Present upsell offers and process upgrade orders through Infusionsoft, giving customers immediate access to their newly purchased content.
- Create a recurring revenue stream that delivers compound revenue through acquiring new members and retaining existing members.

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CustomerHub Roadmap to Success

Last Modified on 08/02/2018 3:57 pm MST

If you're here, you've likely recently completed the Launchpad section of your CustomerHub application. Great work! This section was designed to get you familiar with the admin section of CustomerHub and to give you an overview of the steps you need to take to get your site started. Let's take a moment for a brief review of what you have learned so far, and what the next steps are for each section.

- **Choose a Theme** – The theme of your CustomerHub site defines the look and feel of your site that your customers will experience. By completing this step you've chosen which theme you will use for your site – you can always change it later. The next step is to make sure you customize the colors, fonts, and set your logo so that the site matches your brand.
- **Set up groups** – Member Groups are used in CustomerHub to give your members access to content that you provide for them. To be part of a group, your member must have the associated tag or subscription in Infusionsoft that was defined in the Group setup process. As you add pages and media to your site, you will have the option to restrict access to certain Groups if you choose.
- **Create Pages** – As an administrator - this is the most common activity you will be doing in CustomerHub, creating pages for your content. After uploading video, audio, or other content, you'll need to add it to a page so that your members can view it. Now that you've built your first page, you will want to keep working to get your site built and your content uploaded – the more you build the quicker you will become.
- **Get Members –** There are many ways to add members into CustomerHub, most commonly using either a web form from Infusionsoft, or using the Public Registration page that is built into your CustomerHub Application (register now link on the sign in page). Once you have a way for your members to sign up, the next step is to start promoting your site to everyone you know and get members to sign up for access.

1. Define Your Strategy. Before you get too far along, it is advantageous to take the time to define a strategy for your site. Doing this will clarify the vision for your site, how you will serve up your content, and how much time you will need to invest to keep your site engaging for your members. It will also help you build an action plan that you can stick

to so that your site is built in a timely fashion. There are many different approaches and every business is different, but here are some of the most common strategies that are used by CustomerHub customers:

1. **Freemium model** – The Freemium strategy is a commonly used method for engaging with new leads and then upselling to a subscription or one-time purchased content. The idea is that you are first establishing yourself as an expert in your field by providing some valuable content at no charge to members. After engaging with your content, to unlock more premium content they will need to pay to get access – this is where the Member Groups come in to the equation. A simple hypothetical example would be purchasing access to a series of pages that are part of your 'Gold Premium' Member Group in CustomerHub. When you created the Group, CustomerHub automatically created a tag in your Infusionsoft account called 'Gold Premium' – this is the tag that a member will need to gain access. To accomplish this, simply tie the 'Apply Tag' action to a purchase trigger in Infusionsoft in either the campaign builder or legacy that applies the 'Gold Premium' tag. When your member purchases the upgrade, they will get the necessary tag to add them to the Group and unlock the premium content. Watch the replay of this webinar to learn more about the Freemium Model and get the creative juices flowing: Generate More Leads with CustomerHub.
2. **Training Platform** – this is another common use for CustomerHub that is employed by many companies to train their employees, customers, or partners through a combination of video, audio, downloads, and other visual content. Using Member Groups, you can easily segment your content and use the same CustomerHub account to provide training to all of your various groups. This means that your members will only be able to see content attached to the group they are in. For internal training purposes you likely would not charge any fees to access the training, and just apply the Group tag through a web form or manually in Infusionsoft. If this is paid training, you can use the same method outlined in the Freemium section. Watch the replay of this webinar to learn more about this strategy: How Iron Tribe Fitness used CustomerHub to grow from a garage gym to over 50 franchises.

2. Setup Billing Automation. Did you know that CustomerHub was originally built to be a billing and subscription management plugin for Infusionsoft? It has since evolved to provide much more functionality, but it still retains all of the same benefits to allow your members to manage their billing on their own. Fortunately, this feature will work with relatively little setup on your part.
    1. **Add your Merchant Account** – First item on the list is to connect your Infusionsoft merchant account into CustomerHub. You will need this connection so that you can process invoice payments through CustomerHub.
    2. **Publish 'My Account' pages** – In CustomerHub we've provided a set of default

pages that are used for viewing Invoices, account information, and making payments. When you first start using CustomerHub, these pages will be in a 'Draft' state and will need to be published before your members can use them.
3. **Set Billing Automation triggers** – Next step is to setup any billing automation triggers that you'd like to automatically happen over in Infusionsoft. Common triggers are sending an email if there is a failed payment, expiring credit cards, or successful payment.

3. Setup an Online Community. The social aspect of a website is important to many businesses – it provides a way for their users to interact with each other, promote your content, and even generate new leads for you automatically. CustomerHub allows several options for adding community features to your site:
    1. Facebook Comments Integration – Setting up the Facebook commenting platform on your site will allow your members to comment on any pages you choose as long as they are signed in with their Facebook account. The genius of this option is that you are able to setup the redirect link that new leads will be sent to if they click on any of the shared comments on your members' Facebook pages. For example, Your member Laura leaves a comment on one of your videos saying how great it was and what she learned – that comment is also posted to her wall on Facebook. You've set the default redirect link to be a link to your landing page for new members, and any of Laura's friends who click the link are directed to that page so they can opt-in to your site.
    2. Add a forum for your members – CustomerHub does not currently offer any built-in forums, but there are two great options for integrating external forums into your CustomerHub website for your members to use.
        1. Tender Support – Tender Support is a simple help desk application that integrates with CustomerHub. Tender Support allows logged in members to participate in community driven discussion boards, submit support requests for your review, and view any knowledge base articles that you've made available for your members. When a user is logged into CustomerHub, they will automatically be passed through to Tender Support without having to remember a separate sign in.
        2. Maven Forum – The plugin requires you to install SimplePress, a free forum plugin for WordPress, onto a separate domain with WordPress installed. You will then install the Maven Forum plugin which will provide an embed code to use in CustomerHub. Simply drop this code onto a CustomerHub page and your members will automatically be able to use your forum and interact with each other. You can also control access to sections of the forum based on the tags your members have. Keep in mind is that you will want to install an SSL certificate onto the site your forum is on – CustomerHub is a secured platform and many browsers will block any insecure content embedded

within the environment.

4. Increase Sales with Smart Upsells. Depending on which study you read, you'll probably find that it is 5 to 10 times more expensive to get a new customer than it is to retain and resell to an existing customer. You already have a database of customers who have signed up for offers, have clicked through on specific emails, and have purchased other products; each time they take one of these actions they are telling you about themselves. They are segmenting themselves, providing you with information for you to understand their needs and interests. You can leverage this information in a number of ways in CustomerHub to intentionally and intelligently upsell relevant products and services to your existing customers.

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Permissioned Content Delivery

Last Modified on 08/02/2018 3:57 pm MST

CustomerHub gives you full control over who can view the content you've created and how it is consumed through permissions you assign to Pages, Partials, and Member Files. These tools can help you manage content access and set up an automated process for revealing the content in smaller chunks. Setting up a sequential content delivery strategy helps you:

- Prevent overwhelming your customers by encouraging them to take their time to complete one step before progressing to the next.
- Keep customers longer by enticing them to visit the member site regularly to view new content.
- Set up a logical training path so that customers learn foundational concepts before advancing to more complex lessons.
- Increase revenue through sales of premium content.
- Satisfy self-paced learners by giving them the ability to "unlock" content on demand.

Prior to setting up your sequential delivery strategy in CustomerHub and Infusionsoft, develop a plan on paper. In the beginning, you should keep your plan as simple as possible so you can get the site up and running. You can refine the plan as you monitor member activity and get their feedback.

Your content plan should include the following information:

- Subscription / Member / Training Program Product Name and Target Audience
- Content Outline and Schedule
    - Page Topic 1
        - Criteria for Accessing this Page (Self-Paced or Scheduled Delivery)
        - Media on Page (Video, Audio)
        - Member Files on Page and Criteria for accessing files
    - Page Topic 2
        - Criteria
        - Media
        - Files

Access to scheduled content is controlled through the Tags on the member's Infusionsoft contact record. These tags can be applied on a specific schedule through a campaign sequence (timed delivery) or can be applied based on a click on an Action Link in the CustomerHub portal (Self-Paced.)

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Customerhub Content Types

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All of the site content you create is displayed through Pages and Partials

Pages

A page is a web page that can be linked to the navigation menu in the member / customer portal. A page can be part of the top-level navigation, or can be added as a submenu option under one of the main menu options. Access to a page is defined by a visitor's active Infusionsoft Subscriptions and Tags and the defined member group you assign to the page when you create it. A Page layout includes a main body area and a right side column.

Partials

A Partial is a snippet of reusable content that can be merged into multiple Pages. Partials do not function outside of a Page; they are not linked to the navigation menu. A Partial does have permission settings, meaning you can show or hide Partials within a specific web page based on a visitor's active Infusionsoft Subscriptions and Tags and a defined member group. Partials are powerful in that they help you reuse content across the site and help create a more personalized experience for each user (e.g., display specific tips for new subscribers, but hide them from more experienced site members). Partials can also be used to display targeted upsell offers or partner ads based on the information in the visitor's Infusionsoft Person Record.

Each Page or Partial can include multiple types of content. You create content libraries in CustomerHub and then use merge fields to display the content within a Page or Partial. There are no permission settings for the multimedia content, this content displays based on the permission settings for Pages and Partials where they are used. Hosting your files through CustomerHub makes it more difficult for members to distribute content and ensures the security standards are compatible with every browser.

- **Images**: CustomerHub supports the most common image types (.jpg, .gif, and .png). You upload images to create a library of images that you can display in multiple Pages and Partials. Adding relevant graphics to your content makes it more attractive and can be used to segment the page content.

- **Video**: CustomerHub includes an all-in-one video hosting, streaming, and delivery service that allows you to store videos (Standard 480 x 320, Widescreen 640 x 360, and 720p HD 1280 x 720 - up to 5 GB per file) within your CustomerHub application. CustomerHub automatically encodes uploaded videos to ensure optimal speed and playback compatibility across multiple browsers and mobile platforms; including those requiring HTML5. Once uploaded, it is easy to merge the videos into Pages and Partials. It can take some time to process larger video files, so we recommend you produce the smallest video file possible that meets your quality standards. The encoding process transforms the video files to h264 (mp4) and webm formats - producing the original file in one of these two formats will also speed up the encoding process.
- **Audio**: CustomerHub also includes the ability to host audio files in the most common formats (.wav, .mp3). CustomerHub handles the hosting, streaming, and delivery of the audio file, including an attractive audio file player that can be embedded into Pages and Partials.

You can distribute digital file download links and control access to them through permission settings.

- **Member Files**: You can store an unlimited number of digital files (up to 5 GB per file) and make them available through download links. You can upload document files (.pdf, .doc, etc.), spreadsheet files (.xls, .csv, etc.), presentation files (.ppt), media files (audio and video) and more. The digital download links are hidden or displayed within a Page or Partial based on the permission settings for each individual file.

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Navigate CustomerHub

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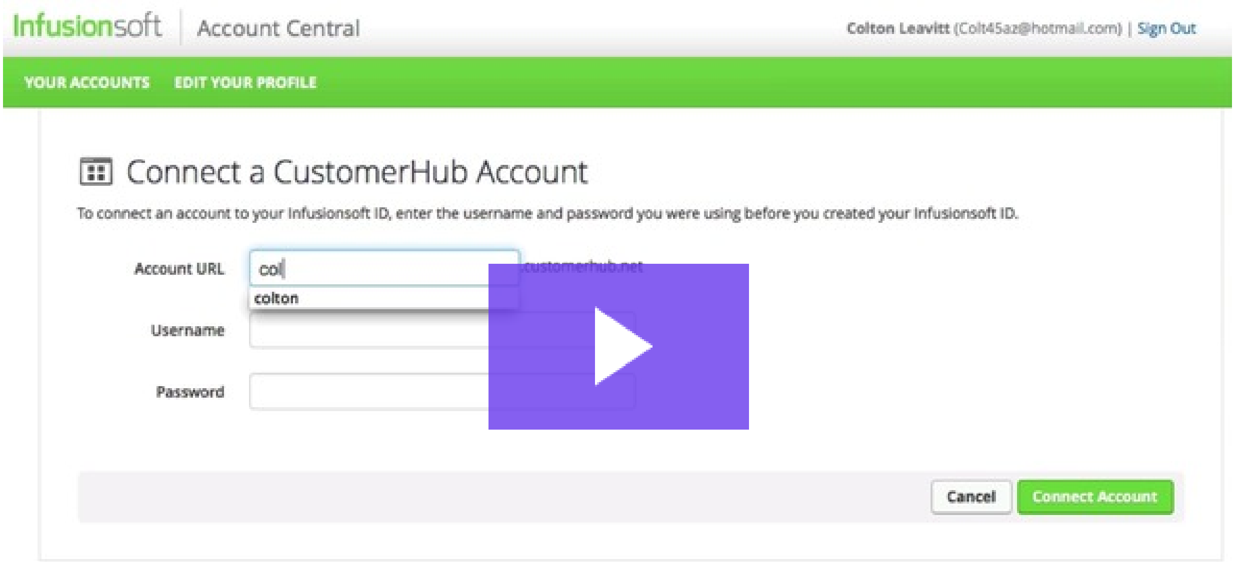
CustomerHub has a back-end administrative interface (the Dashboard) and a front-end customer Member Portal.



The Getting Started Launchpad

The Getting Started Launchpad provides a clear path to help you get "member-ready" with CustomerHub. After completing the launchpad, you will have:

- Integrated your Infusionsoft account with your CustomerHub account
- Created a process to sign-up new members
- Customized the look & feel of your member portal
- Added some initial site content

Members

The Members list displays contact records from Infusionsoft that have been assigned a Username and Password to access CustomerHub. The Member list may include your customers, partners, or employees who are enrolled in a membership or training program and have access to restricted content. It also may include customers who use CustomerHub to manage their account (view invoices, manage subscription billing, etc.). Members are created through an add to CustomerHub Campaign Builder Snippet in Infusionsoft.com and all billing and member data is managed through your Infusionsoft application. You do not create or manage Members through the CustomerHub portal; however, you can organize your members by creating folders in CustomerHub.

Pages

Pages refer to website pages that display information to your website visitors and members.

Library

The Library stores all of your multimedia files, partials and action links.

Settings

The Settings menu includes CustomerHub account, integration settings, member groups, customization tools, and optional content packages and add-ons.

Site Preview

Click on Site Preview to view the front end of your CustomerHub portal to preview design or content changes and verify or troubleshoot member permissions. Use the drop-down menu by your username to log out of CustomerHub or switch to another application connected to your Infusionsoft ID.

Member / Customer Portal

The Member / Customer Portal is the public side of the CustomerHub website. It is where your members log on to view content and/or manage their billing. The menu options each member views and the information available on the pages are custom for each member group you create. You can customize the look and feel of the portal to match your company's branding as well as customize user experience based on active Infusionsoft subscription programs and Infusionsoft Tags.

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Customerhub Application Settings

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If you plan to use CustomerHub to process billing updates, you will need to link it to one of the Merchant Accounts you've integrated with Infusionsoft.

1. Enter an email address into the Support Email field. This email address will receive notifications and help requests when your customers need help using CustomerHub.

2. (Optional) WYSIWYG Editor. The WYSIWYG Editor is turned on by default. This is the easiest editor to use to create pages in CustomerHub. Turn the WYSIWYG editor off if you want full control over the page style and content by inserting HTML code.

3. Go to the Payment Settings section to enter the Merchant ID. Keep your CustomerHub application open and go back to Infusionsoft to get the Merchant Account ID.

4. Go to **Setup** > **Misc. Settings** > **Order Settings** > **Merchant Accounts** tab.

5. Locate the merchant account you want to use to process the payments submitted through CustomerHub and click on Edit. The ID number is at the end of the URL - as highlighted below. Note: You may need to resize the browser window to view the full URL. https://training.infusionsoft.com/MerchantAccount/manageMerchantAccount.jsp?view=edit&ID=1

6. Make note of the Merchant ID and return to CustomerHub.

7. Enter the ID number into the Merchant ID field. Note: This is a required field. If you do not plan to use CustomerHub for collections, then enter zero into the Merchant ID field. You can edit this setting to integrate with a Merchant Account in the future.

8. Click on the **Currency** drop-down to select a currency symbol. This symbol is displayed to your customers or members when they submit payments and view invoices through CustomerHub.

9. (Optional) Payment Notification. This setting is on by default, which means you will receive an email notification when someone submits a payment through CustomerHub.

10. (Optional) Payment Notify Email. Enter the email address that will receive the Payment Notification emails.

11. (Optional) Invoice Note. Enter a message that will display to all customers when they view their invoices through CustomerHub.

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Customize The Member Portal Navigation Menu

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The main page tab and sub-page link navigation options your members see in your CustomerHub portal are determined by the permission settings assigned to each individual page. These permissions are configured using active subscription and tag tag criteria. If a menu option does not show up when you think it should, you may need to check the page permission settings. The order of the options in the main tab and sub-menu navigation menus is based on Page and Sub-Page order.

1. Click on **Pages**
2. Pages and sub-pages are listed in the same order they will appear on the navigation menu of the member portal.
3. Click the move icon to drag the page up or down and drop it to insert the page in a new position.
4. If a page has sub-pages, you will see a small arrow icon next to the main page. Click on this icon to see the sub-pages.
5. To reorder sub-pages, click on the **edit** button of the main page.
6. Then click the sub-pages tab.
7. You can drag and drop these in the order you want.

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Page And Partial Templates

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You can create custom Page and Partial Templates to use as a starting point when adding new content to your customer / member site. Creating templates will speed up the process of adding new information to the site and will help ensure consistent formatting. This can also help reduce the amount of repetition involved in adding multiple pages with similar content. It is worthwhile to invest time and / or money into creating templates since they not only increase efficiency, but also make it easier for you to train others how to add content to your CustomerHub website. You can create a library of templates for Pages and for Partials. This uses Pages as an example. Once a template is created, it will appear in the template drop down so you can copy it when you create a new Page or Partial.

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Create A Member Page

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A CustomerHub page is a web page that can be linked to the navigation menu in the member / customer portal. A page can be part of the top-level navigation, or can be added as a sub-menu option under one of the main menu options. Access to a page is defined by a visitor 's active Infusionsoft Subscriptions and Tags and the membership group you assign to the page when you create it. A Page layout includes a main body area and a right side column. To create a page, you will enter text and merge in content (images, videos, audio, or member files) from the multimedia libraries.

1. Go to **Pages**
2. Click on the **Create Page** button.
3. To create a custom page, click the custom page type. There are other page types you can choose from.
4. Enter a Page Name. This name is displayed in the navigation menu, at the top of the web page, and as the page title in the Internet browser.
5. Select the a page Type (Main or Sub-page.) Main pages are added as a top navigation tab. Sub-pages are shown as links below the tabs when the related main page is viewed.
6. Choose who can view this page (you can come back and change this later.)
7. Click the **Save** button to create the page.
8. Enter the page Content. In most cases, you will use the built in WYSIWYG editor to create page content. If you have the WYSIWYG editor disabled, go to **Settings > Application Settings** to toggle it off. Note: You can click on the HTML icon to paste HTML code into the editor instead of using the WYSIWYG tools.
9. Use the Media Selector Tool to insert multimedia (images, videos, etc...) into the page.
    1. Click into the WYSIWYG editor where you want to insert a file.

2. Click on a media tab, then click on the name of the file you wish to insert into the page. Note: You can enter a file name into the Search field to find a file more quickly in larger media libraries.

> **Be Careful!** Do not edit the merge code for the multimedia files or the files will not merge into the page properly.
>
> Examples:
>
> - Video: -1324411893
> - Audio: -1326298166
> - Member File: 0

10. (Optional) New pages use the Default Right Column. This generally displays your company logo and any information you entered under **Settings > Customize Theme** tab. Click on the link to edit the Default Right Column or un-mark the checkbox to create a custom right column for this page.

11. New pages are considered Drafts. You must click the **Save & Publish** button for the page to go live on your member website. Click **Save** to save this as a draft for now.

12. Click on the **general** info or **permissions** tab to make other changes to the document.

13. Click on **Site Preview** to preview the page and test the access permissions.

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Create A Partial And Merge It Into A Page

Last Modified on 06/19/2018 3:06 pm MST

A Partial is a snippet of reusable content that can be merged into multiple Pages. They are not linked to the customer / member portal's navigation menu; instead they are delivered through a CustomerHub web page.

Partials are often used to:

- Insert the same message in multiple locations throughout your Member / Customer portal so that it is easy to update (from one location) when changes are needed.
- Deliver audience-specific content within a particular page (e.g. a welcome video for new members on the Home page that automatically goes away after x number of days.)
- Feature new site content.
- Highlight and sell access to additional paid content
- Present an upgrade offer.
- Display targeted partner ads to customers / members

The Partial is displayed based on the permissions you assign to the partial when you create it, the permissions of the page you merge it into, and the website visitors active Infusionsoft Subscriptions and Tags.

Example

You run a membership program that has three member groups: Silver, Gold, and Platinum. The Silver members have access to some articles only. The Gold members have access to Articles with multimedia content (like video and audio files). The Platinum members have access to all of the previous content as well as worksheet files, case studies, and resource lists. They are also eligible for special discounts on products purchased from you and your partners.

You can create member-specific partials and embed all of them on the Home Page or in the Right Column of your site, displaying a different upsell option based on the current membership group.

To Silver members, you can display a "teaser" that promotes the Gold member group. This part of the page (Partial) would be hidden from Gold and Platinum members based on the permissions you've assigned to it.

- To Gold members, you can present a special incentive to upgrade to the Platinum member group.
- And, to the Platinum members, you could display the appropriate product or partner promotions.

You can use CustomerHub Action Links to automatically process an upgrade order from inside of CustomerHub and update the member's access to the next member group.

1. Go to **Library** > **Partials**
2. Click on **Create Partial**
3. (Optional) Select a partial template to copy.
4. Enter a Partial Name (e.g. *Silver Member Welcome Video*) and click **Save**. The Partial Name is not seen by customers / members. It is used to identify the content so you can easily recognize it and merge it into Pages.
5. Enter the partial Content. Remember, this partial will be merged into a page so keep it brief. In most cases, you will use the built in WYSIWYG editor to create page content.

Note:If you have the WYSIWYG editor disabled, go to **Settings** > **Application Settings** to turn it on.

6. You will use the media selector tool to insert multimedia content (images, videos, etc...) You can also use these tools to insert a link to download a file.
    1. Click into the WYSIWYG editor where you want to insert a piece of media.
    2. Click on a **Media** tab to view its content.
    3. Click on the name of a file to insert it into your partial. Note: You can enter a file name into the Search field to find a file more quickly.
7. Click the **Save** button
8. Click on the **Permissions** tab to define which site visitors will be able to view the partial when they access the page it is merged into and click **Save**.
9. Click on the **Site Preview** tab to preview the page and test the access permissions.
10. To Merge a Partial into a Page, go to **Pages**
11. Click the name of the page or sub-page you want to modify.
12. Click into the body of the page where you want to position the Partial.
13. Click on the **Partials** media tab and click on the file name to insert it into the page. Note: You can search for a partial by name or filter the list by Folder.
14. Click the **Save** button

Be Careful! Do not edit the merge code for the multimedia files or the files will not merge into the page properly.

Examples:

- Video:-1324411893
- Audio:-1326298166
- Member File: 0

If you are using a Partial Template you will need to replace the example merge fields with new ones.

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Personalize Pages And Partials With Information From Infusionsoft

Last Modified on 06/18/2018 9:23 am MST

CustomerHub gives you the unique ability to merge personal information (name, company, etc.) from your Infusionsoft account into a CustomerHub page. To the member, it feels like the page was created just for them. Adding personal information can make the copy much more powerful. It helps create an emotional connection and can make a special offer seem more tailored to an individual's needs.

1. Go to **Pages** (or **Partials**)
2. Click the name of the page to edit it, or click on the**create page** button to add a new Page.
3. Click into the text body to place your cursor where you want to insert personal information
4. Click on the **User Fields** media tab, then click on the name of the field you wish to insert into the page or partial.
5. Repeat to insert additional User Merge fields.
6. Click **Save** when you are finished editing the page.
7. Test the User Merge fields by viewing the page as a person who has permission to view the page you just edited.

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Manage Videos And Add Them To Pages And Partials

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CustomerHub provides you with a secure website with a 256 secure encrypted connection using a SSL certificate. This means that the videos you use within CustomerHub should be hosted on a secure server too; otherwise some Internet browsers may display security warnings. To make it easy for you to host videos in a secure location, CustomerHub includes an all-in-one video hosting, streaming, and delivery service. This allows you to store videos (Standard 480 x 320, Widescreen 640 x 360, and 720p HD 1280 x 720 - up to 5 GB per file) within your CustomerHub application rather than managing video through a third-party service (e.g. Vimeo). It can take some time to process larger video files, so we recommend you produce the smallest video file possible that meets your quality standards. CustomerHub automatically encodes uploaded videos to ensure optimal speed and playback compatibility across multiple browsers and mobile platforms, including those requiring HTML 5. The encoding process transforms the video files to h264 (mp4) and *webm* formats. If you produce the original file in one of these two formats the encoding process will take less time. Once uploaded, it is easy to merge the videos into Pages and Partials.

1. Go to **Library** > **Video**
2. Hover over the **Upload Video** button and select a video size preference. Note: You should only choose HD Video if you are uploading a HD Source video.
3. Click on **Choose File** to browse your computer and select a video to upload. Double-click on an image to upload it.
4. Click on **Done** to go to your video library to view the video you just uploaded and verify the system finishes encoding it.
5. To merge a video onto a CustomerHub page, Click into the WYSIWYG editor where you want to insert a file.
6. Click on the **Video** media tab and click the name of the file to insert it into the page. Note: You can enter a file name into the Search field to find a file more quickly in

larger media libraries.

Please be Patient. Large files take longer to encode. You can continue working on other tasks and check back later to verify success.

You cannot revise videos once they've been uploaded to CustomerHub. If you need to replace a video you will first upload a new one. After you upload the new video, you will need to edit the Pages and Partials where it is used to remove the old video merge link and insert the new one. Once you've finished updating the Pages and Partials, go back to the video library (Library > Video), and click on the delete button to permanently remove the old video.

Manage Digital Files And Add Them To Pages And Partials

Last Modified on 06/18/2018 9:23 am MST

CustomerHub includes unlimited file storage space. You are able to upload files (up to 5 GB each) of various types (product files, video files, document files, and more) that members can download while logged into your the CustomerHub site. You can use the Member Files feature to deliver supplemental documentation that supports your membership site content (e.g. worksheets or podcasts) or use it to deliver and provide ongoing access to digital product files that are too large to deliver through Infusionsoft. Once a file is uploaded, you can define file permissions that restrict access to it based on Infusionsoft tags and subscriptions. Members and customers will access the digital files through their filebox or through file merge links you add to individual pages and partials to provide the download links in context.

1. To add Member Files, go to **Library** > **Member Files.**
2. Click on **Upload File**
3. Click on **Choose File** to browse your computer and select a file to upload. Double-click on the file to upload it.
4. (Optional) Click on add another file to select another digital file for upload.
5. Click **Done** to go to your Member Files list to view the files you uploaded and define member access permissions for them. *Note: You cannot revise or replace files once they've been uploaded to CustomerHub. If you need to update a file you will first upload a new one. After you upload the new file you will need to edit the Pages and Partials where it is used to remove the old file merge link and insert the new one. Once you've finished updating the Pages and Partials, go back to the Member Files list (Content > Member Files) and click on the delete button to permanently remove the old file if you are no longer using it.*
6. Members can sign in and access files via their filebox.

7. Visitors and members can download files directly from pages or partials.

8. To insert a link to a file on a page or partial, go to**Pages** or **Partials**.

9. Click the name of the page you want to modify.

10. Click inside the body to specify where you want to insert the digital file link.

11. Click the **Files** media tab, then click on the name of the file you want to insert into the page or partial.

Pro Tip! You can upload up to 25 files at the same time.

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Manage Audio Files And Add Them To Pages And Partials

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You are able to upload audio files to your CustomerHub site and embed a player into individual Pages and Partials to supplement page content or to deliver content via podcast. The most common formats are *WAV* and *MP3*. The *WAV* format produces a high quality audio that runs on any Windows or Mac systems and most web browsers. However, it does not compress the audio and produces a larger file. *MP3* is the most popular format for web and download because it maintains close to original quality while compressing the file size to about 1/10th of the original size, resulting in faster upload and download times.

1. To add audio files, go to **Library** > **Audio**
2. Click on the **Upload Audios** button
3. Click **Choose File** to browse your computer and select an audio file(s) to upload
4. Click **Done** to go to your audio file library and view the audio file you just uploaded and monitor the encoding process. Be patient - larger files take longer to encode. Note: You cannot revise audio files once they've been uploaded to CustomerHub. If you need to replace an audio file you will first upload a new one. After you upload the new audio file, you will need to edit the Pages and Partials where it is used to remove to old audio merge link and insert the new one. Once you've finished updating the Pages and Partials, go back to the audio file library (Content >Audio) and click on the delete button to permanently remove the old audio file, if you are no longer using it.
5. To merge audio files onto a CustomerHub page, click on the WYSIWYG editor where you want to insert a file.
6. Click on the **Audio media** tab, then click on the name of the audio file you wish to merge into the page. Note: You can enter a file name into the Search field to find a file more quickly in larger media libraries.

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Manage Images And Add Them To Pages And Partials

Last Modified on 06/18/2018 9:23 am MST

CustomerHub provides you with a secure website with a 256 secure encrypted connection using a SSL certificate. This means that the images you use within CustomerHub should be hosted on a secure server too, otherwise some Internet browsers may display security warnings. Images can be up to 5 GB in file size, however, we recommend reducing image file size to the smallest size acceptable (while still maintaining image quality.)

1. To Add, Edit, or Delete Images Files, go to **Library > Images**

2. Click on **upload images**

3. Click on **Choose File** to browse your computer and select an image to upload. Double-click on an image to upload it.

4. Click **Done** to go to your image library to view the images you just uploaded. Note: You cannot revise images once they've been uploaded to CustomerHub. If you need to replace an image you will first upload a new one. After you upload the new image, you will need to edit the Pages and Partials where it is used to remove the old image and insert the new one. Once you've finished updating the Pages and Partials, go back to the Image library (Content > Images) and click on the delete button to permanently remove the old image if you are no longer using it.

5. To merge an image into a CustomerHub page, click into the WYSIWYG editor where you want to insert a file.

6. Click on the **Images** media tab, then click on the name of the image file to insert it into the page. Note: You can enter a file name into the Search field to find a file more quickly in larger media libraries.

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Tender Support Integration with CustomerHub

Last Modified on 06/18/2018 9:23 am MST

As your membership programs grow, you will see an increase in support related requests. The Tender Supportintegration allows you to organize your customer care. As a CustomerHub user, you are eligible for a discount of 30% per month. Tender Support provides you with:

- A way to collect support requests from your members.
- A user support forum where your members can help each other.
- A FAQ and Article knowledge base.
- Email Support

The integration between CustomerHub and Tender Support makes it easy for your members to move from one portal to another. Once the customer is logged into CustomerHub, they can easily click on a link to enter your Tender App support portal without signing in again.

1. To Enable The Tender Support Integration, set up a Tender Support account. If you want to test the integration, you can start out with a 14 day Free Trial .
2. Login to your Tender account and go to **Account & Settings** > **Extras** > **Single Sign-On**.
3. Go to the **MultiPass Single Sign-On** section.
4. Make sure Single Sign-On is turned **On**.
5. Copy the SSO API Key and Site Key. You will need to enter these into CustomerHub.
6. Login to CustomerHub and go to **Settings** > **Integrations**.
7. Enter your Tender Support account email address into the Tender Email field.
8. Enter the Tender App (Site Key) and SSO API Key
9. (Optional) Customize the Help link for CustomerHub. By default this link shows up in the top right of the member portal. The link text says "Help" by default, but you can

change it.

10. (Optional) Enter a Custom URL. If you configured a Custom URL for your Tender Support portal in the Tender Support settings, then you will also need to enter that URL here.

11. Click on **Embed this Add-on**.

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Customize Your Customerhub Member Website

Last Modified on 06/19/2018 3:07 pm MST

Follow the instructions below to:

- Upload your company logo
- Change the company name in the header
- Choose your theme
- Customize your theme

1. To Upload or Change Your Company Logo, Go to **Settings > Customize Theme > logo.** The height of the logo must be less than 200 pixels and the width must be less than 210 pixels. Larger logos are re-sized automatically. For best results, the logo file should be in *GIF* or *PNG* format with a transparent background.

2. Click on **Choose File** to select the logo file stored on your computer.

3. Double click on the logo file to select it. The file name is displayed so you can make sure you've selected the correct file.

4. Click **Save** to complete the upload process. The logo is updated immediately.

5. To Add your company name, go to **Settings** > **Application Settings**

6. Edit the contents of the **Application Name** field.

7. Scroll to the bottom of the settings page and click **Save**; the update is applied immediately. The Drop-down Menu layout option displays your company logo in the header of your site instead of the Application Name. You can either switch to the Drop-down Menu layout or customize the CSS stylesheet for the Tab layout to hide the Application Name and / or replace it with a company logo.
8. To Choose a theme, go to **Settings** > **Change Theme**

9. Browse through the available themes and click the **Switch** to this theme link next to the theme you like. CustomerHub has easy-to-use tools that help you with basic color customization. You can also customize the site's CSS Stylesheet for more advanced customization.

10. To Customize your theme, go to **Settings** > **Customize Theme** > **Colors** tab

11. Refer to the image map to see what colors you can customize. You can also use this area to preview color changes before you save them.

12. Go to the color field for the item you want to change.
    1. If you know the hexadecimal code for the color you want to use, click into the code field to update the color code. The "#" symbol is required.
    2. If you don't know the hexadecimal code, want to add RSB / HSB code, or just want to experiment, click on the small colored square next to the hex code to access the color picker.

13. (Optional) Preview the color change in the image map above.

14. (Optional) Repeat this process to edit additional color fields.

15. Click **Save**. The updates are applied immediately.

16. Click on **Site Preview** to view the customer / member portal and see the color changes.

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Keep Customerhub Content And Members Organized

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As the amount of content you deliver through CustomerHub grows, a good organization system will become increasingly important. You can define global folders and use them to filter the CustomerHub member or content lists. You might define folders by membership program, content topic, etc. Each item (member, page / partials, multimedia file, or action link) is manually assigned to a folder.

1. To create a folder, go to **Pages** or **Library**
2. Hover over the **Move To** button, enter a name (e.g. Bronze Membership), and click the button to create the folder. Note: You can add and delete folders, but cannot edit their name.
3. To Assign Items to a Folder, go to **Pages** or **Library.** The folder you created is globally accessible. You can add all types of content to it (e.g. the Bronze Membership folder might contain pages, videos, members, and more). These instructions use the Page list as an example. Note: Each item can only be assigned to one folder at a time. However, you can move an item from one folder to another when needed.
4. Check the item(s) you want to move to a folder.
5. Hover over the **Move To** button and select the folder.
6. After you've added items to folders (members, pages, etc.), you are able to use the folders to filter various lists throughout your CustomerHub admin interface.
7. To Delete a Folder, hover over the **Move To** button and click the trashcan icon to permanently delete the folder. Note: Deleting a folder does not delete the content you've assigned to the folder. However, you will not be able to filter that content by a folder until you assign it to a new one.

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Manage Your Customerhub Members

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Introduction

There are two primary aspects to a CustomerHub membership site or customer portal:

- **Website Content**: CustomerHub is a hosted website solution that allows you to deliver content through a secure, password-protected website. You log into CustomerHub to manage content, including multimedia files, pages, partials, and member groups. The content is all stored and updated through CustomerHub.
- **People**: CustomerHub displays a list of the members who are registered to access your CustomerHub website. The people on your member list have been registered in your CustomerHub site and have an email address and password stored in Infusionsoft.

Once a person has access to CustomerHub, they remain a member unless you revoke access completely. They are able to log into CustomerHub and view any information for which they meet the member group criteria. If a member does not meet the criteria for any of your member groups, they are granted public access, meaning they can see any page that has no member group assigned to it.

Troubleshooting Member Access

Infusionsoft is the database that stores all of your member details, including billing, credit card, subscription status, and detailed contact information. You log into Infusionsoft to update member information. Here are some guidelines that may help you resolve member issues when they arise:

- Subscription-related access is enabled as long as a member's subscription status is active. If the status is inactive, the member will no longer have access to the content that uses that subscription as a criteria for a member group.
- CustomerHub automatically checks the member's Infusionsoft contact record each time

they log into your CustomerHub website. The content will update automatically based on the most current Tags and active Subscriptions. In most cases, you don't need to log into CustomerHub to make any changes to the Member record.
- A member may have difficulty logging in after you run a dup check and merge duplicates in Infusionsoft. When this happens, the Infusionsoft Contact ID may change. If the Infusionsoft Contact ID does not match up with the CustomerHub Member ID, the member can't log in. To fix the problem:
    - Log into Infusionsoft and find the person's contact ID.
    - Log into CustomerHub and click on Members to lookup the person on the Member List.
        - Click on the person's name to edit their member profile.
        - Click on the Other Info tab to update the Infusionsoft ID. Enter the new ID and save the change.

Updating Contact Information

When your members log into the CustomerHub website, they can update contact and billing information and the updates will synchronize with your Infusionsoft database.

When you update contact information in Infusionsoft, it synchronizes with CustomerHub the next time that member logs on to the website. Although most member management should be done through Infusionsoft, there are a couple of tasks that must be done through the CustomerHub member list.

- Organize members into Folders or delete members records
- Revoke access to CustomerHub. Member access is adjusted dynamically based on the Tags on their Infusionsoft contact record and their active subscriptions. Members will continue to have access to CustomerHub as a Public Member as long as a member record exist in CustomerHub and they have an email address and password in their Infusionsoft contact record. If you want to revoke access completely, log into CustomerHub and delete the person's member record from the Member List. This is rarely necessary, but is available for those who need it.

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Register A New Customerhub Member

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The Campaign Builder includes an Add to CustomerHub icon to make it easy to integrate CustomerHub with the Campaign Builder. Please note that this feature requires a CustomerHub license.

1. Sign into your Infusionsoft account and go to **Marketing > Campaign Builder**
2. Click on the name of the campaign you wish to edit or create a new campaign.
3. Double-click on the campaign sequence you wish to edit or create a new campaign sequence.
4. Drag the **Add to CustomerHub** goal onto the sequence canvas and double-click it to configure.
5. Enter your CustomerHub app name. The app name is the first part of your CustomerHub URL (app name.customerhub.net)

6. Click **Save**

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Give Members Access To A Partial

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Partial permissions are based on member groups. Each partial can be merged into multiple pages of your CustomerHub website. This makes it easier to manage repetitive updates, promote additional products, or upsell members on appropriate pages. Member Groups can be created in advance, then assigned to a Partial. They can also be created "on the fly" when you are configuring partial permissions.

By default, the visitor will either see partial content within a page, or the content will be hidden from them. Partials have an additional feature called a "teaser" that allows you to display a message to members who do not have permission to view a specific piece of content. The Teaser message is displayed until the person becomes part of the required member group that has access to see the content. This can happen through a purchase, a click on a CustomerHub Action link, completion of a survey or other web form, etc.

1. Go to **Library** > **Partials**

2. Click **edit** next to the name of a Partial you wish to edit.

3. Click on the **Permissions** tab and select Certain Members (Permissions) from the access drop-down.

4. Select the member group(s) you've already created by clicking inside the text box, or select edit all groups to add a new one.

5. (Optional) You can add custom permissions as well. The criteria are based on Infusionsoft Tags, Subscriptions, or a combination of both. You must select at least one criteria. **Be Careful!** If you use both Subscriptions and Tags to define permissions, CustomerHub will check the contact record in Infusionsoft and give them access as long as they meet the Subscription criteria OR the Tag criteria. The member does not need to meet both!

6. After you configure the criteria, enter a Name that is short and descriptive that will be used to identify the new member group.

7. (Optional) Mark the check-box if you want to display a Teaser to site visitors who do not meet permission criteria for the Partial. Use the editor to add text or merge in multimedia files (e.g. video)

8. Click **Save**

9. Click the **Site Preview** tab to select the member group you created for this Partial

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Give Members Access To A Customerhub Page

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Permission to view a page is defined by what member group the visitor belongs to. Member groups can can be created in advance, and then assigned to a Page, or they can be created "on the fly" when you are configuring page permissions.

1. Go to **Pages**
2. Click **edit** next to the name of a Page you wish to edit.
3. Click on the **Permissions** tab and select **Certain Members** (Permissions) from the access drop-down.
4. Select the member group(s) you've already created by clicking inside the text box, or select edit all groups to add a new one.
5. (Optional) You can add custom permissions as well. The criteria are based on Infusionsoft Tags, Subscriptions, or a combination of both. You must select at least one criteria. **Be Careful!** If you use both Subscriptions and Tags to define permissions, CustomerHub will check the contact record in Infusionsoft and give them access as long as they meet the Subscription criteria OR the Tag criteria. The member does not need to meet both!
6. After you configure the criteria, enter a Name that is short and descriptive that will be used to identify the new member group.
7. (Optional) Mark the check-box if you want to display a Teaser to site visitors who do not meet permission criteria for the page. Use the editor to add text or merge in multimedia files (e.g. video)
8. Click **Save**
9. Click the **Site Preview** tab to select the member group you created for this Page.

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Create A Member Group To Access Customerhub Content

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Restrict Access To Page And Partial Content

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What people see when they log into your CustomerHub website is determined by one of the following criteria:

Member Groups

Previously, you could only choose one member group (permission) to be assigned to each permissionable element in CustomerHub. This means, if you created a page, you could only give one of your saved member groups access to that page (ex. Gold). To make things easier, we've refactored the permissions database to support multiple permissions in CustomerHub. This means that if you have three member groups in your app (bronze, silver gold) and you want all three to have access to one of your pages, you can simply add all three. Create member groups to limit access based on certain criteria. A member group consists of Infusionsoft tags or active Infusionsoft subscriptions.

Tag(s) applied to an Infusionsoft contact record

Tags are used to segment contact records in Infusionsoft. They tell you more about who the person is, what they are interested in, events they've attended and more. You create Tags and either apply them to contact records manually or tell Infusionsoft when to apply the tag(s) automatically. When you create Page and Partial permissions, you can use a combination of one or more tags to define the target audience for that content. Tags are especially helpful when defining permissions to access free content or to give customers who have not purchased a subscription product access to the billing and account management tools in CustomerHub.

Note: There are a few differences when using Tags as a criteria for setting CustomerHub permissions versus using Tags to search or configure rules in Infusionsoft. You can only base the permissions on the Tags that the person DOES have, and when you select more than one Tag from the list, the person may have ANY of the selected Tags in order to view the content.

The tag list in CustomerHub is automatically populated with the list of tags from your Infusionsoft application.

Action Links used in CustomerHub Pages and Partials can automatically update the Tags for an Infusionsoft contact record, meaning your permissions can update in "real time" as a customer / member clicks on links in your website to purchase an additional product, signify they've completed a module, and more.

Subscription Product(s) a customer has purchased

Membership programs generally involve recurring billing, which means they are associated with an Infusionsoft Subscription Product. When a subscription product is used as a permission criteria, CustomerHub looks at the Status of the Subscription plan(s) in the customer's Infusionsoft record. It will allow access to those customers with ACTIVE subscriptions and deny access to those with INACTIVE subscriptions. When a customer cancels their subscription, you must make sure someone from your team manually updates the subscription status or you tell Infusionsoft when to cancel a subscription automatically. You can define permissions using one subscription product as the criteria, or a combination of several subscription products.

Permissions assigned to CustomerHub Pages and Partial. Once you have Tags, Subscriptions, and Member Groups created in Infusionsoft, you can assign permissions to Pages and Partials. The permissions assigned to a Page determine whether the page link shows up in the main menu or sub-page menu for specific customers / members. The permissions assigned to a Partial determine whether that snippet of information is displayed or hidden from view when a customer / member has permission to view a specific page.

You can create "Teasers" to promote the content for Partials that a customer / member does not have permission to access. Teaser show up in place of the Partial content (e.g. an exclusive video) so that you can promote the content and make it easy for someone to purchase access to it.

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Manually Give Members Access To Your Customerhub Website

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There are several steps involved in granting a customer or new member access to your CustomerHub website. However, the tight integration between CustomerHub and Infusionsoft allows you to automate the process so that you don't need to manage it manually, unless you want to.

When you first get started with CustomerHub you may want to manually create site members for specific lists of people in Infusionsoft instead of waiting for them to fill out a form, click on a link, or make a purchase.

(Optional) Create a CustomerHub *register member action set* for new members.

1. Log into your Infusionsoft Application
2. Go to **CRM** > **Settings** in the master nav
3. Click on **Action Sets** in the settings menu
4. Click on **Add an Action Set**
5. Give the Action Set a name (e.g. CustomerHub: Register Member)
6. Select **Send a http post to another server** from the action drop-down.
7. Enter the Post URL for your CustomerHub account: (e.g. https://yoursite.customerhub.net/web_services/add_user)
8. **Save** the action
9. **Save** the Register Member Action Set.

(Optional) Create the Notification Process

CustomerHub does not automatically send emails or tell the new member how to access your CustomerHub website. The notification email must be sent through Infusionsoft. You should create a CustomerHub: Register Member notification email that delivers login information when someone is registered.

The customer needs to know the following:

- Your CustomerHub site URL
- Their Username: The username is their primary email address. You can use a Merge Field to add this to the email.
- Their Password: The password is also stored in the Infusionsoft contact record. You will use a Merge Field to add this to an email.
- Once you create the email, edit the CustomerHub: Register Member Action Set you created above.

1. Go to **CRM** > **Settings** in the master nav
2. Click on **Action Sets** in the settings menu
3. Click on the **CustomerHub: Register Member** Action set to edit it.
4. Select **Send an Email** form the Action drop-down
5. Select the **CustomerHub: Register Member email template** from the email template drop-down
6. **Save** the Action
7. **Save** the Action set

CustomerHub has provided you with Email Templates, including a new member template. Log on to CustomerHub and go to **Settings** > **Application Settings** and click on to upload them to your Infusionsoft Application.

Find the List of People and Run the Action

1. Go to **CRM** > **Contacts** in the master nav to pull up a Saved Search or enter search criteria
2. Click on and select **Apply Action Set**
3. Select **Run Another Action** Set from the drop-down
4. Select C**ustomerHub: Register Member** from the Chain Action Set drop-down
5. **Save** the action
6. Click on **Process Action** to run the Action for this list

CustomerHub Creates A Member Record

CustomerHub receives the HTTP Post from Infusionsoft and compares the Infusionsoft contact record ID and email address to the existing member list. If a matching record is found, it does not create a new member record. This minimizes duplicates on your member list. If no match is found, CustomerHub creates a new Member record in CustomerHub (accessible from the Members menu in CustomerHub.)

When the new member record is created, CustomerHub checks the password field in the Infusionsoft contact record to see if a password exists. If there is already a password in that field, CustomerHub uses the existing password. If no password is found, CustomerHub generates a random password and stores it in the password field in the Infusionsoft contact record.

Infusionsoft will send the new member welcome notification email if you added it to the CustomerHub: Register Member Action set as suggested above. If you didn't you will need to send the email manually.

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Test Your Customerhub Access Permissions

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Two common areas that may require troubleshooting are:

Website Content Displayed

This factor is completely controlled through CustomerHub Permissions. These determines what appears in the member's main and subpage menu (Pages) as well as which content shows up within a specific page (Partials). You can test this using the CustomerHub Site Preview.

1. Click on the Site **Preview** tab.

2. Select a type of website visitor from the drop-down.
   1. Public Member: This is a member who has a username and password for your CustomerHub site but does meet the permission criteria to view any of the restricted pages. A Public Member can only view the information that is unrestricted and available to all website visitors.
   2. A Member with Permissions: This option allows you to preview CustomerHub through a specific Permission Level. This does not equate exactly with viewing the site as a specific person, since a person may meet the criteria for more than one permission level.

3. Select a Member Group from the drop-down.
   1. Select a defined Member Group (e.g. Silver Member)
   2. Preview with custom permissions: This option allows you to test a specific Permission Level before you define and save it as a permission.

4. Click on **Apply** to see the CustomerHub site as a person who meets the criteria you selected.

Infusionsoft Person Record

Each of your CustomerHub website visitors could have a unique experience since access to content is based on their Infusionsoft Tags and active Subscriptions. It is possible for a single person to have a contact record in Infusionsoft that meets the criteria for more than one Member Group. The only way to view the website from a specific person's perspective is to log into the site with their CustomerHub username and password.

While it is not feasible to test the site from each member's perspective, it is possible to test a specific Permission Level to make sure that CustomerHub and Infusionsoft are properly communicating to grant or restrict access to the content.

1. Create a contact record in Infusionsoft. You might even name it to correspond with the permission level you defined (e.g. Silver Member)

2. Configure the Person Record to meet the permission criteria based on Tags, Subscriptions, or a combination of both.
    1. Apply the Tag(s) you used to define the permission level. Remember, the record must have ALL of the tags you used to define the permission level. If you did not select any tags when creating the Permission Level, skip this step.
    2. Add a Subscription order (or orders) to the contact. The subscription must be Active. You can use this test 16 digit Visa card number (4111111111111111)

3. Create a CustomerHub account for this person

4. Log into CustomerHub as the person to view the content.

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How Your Customers Manage Their Billing And Account Information With Customerhub

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CustomerHub comes pre-loaded with account management pages that integrate with the Infusionsoft subscriptions, invoices, and credit card billing functions.

Important! These pages are hidden by default. You will need to click on a page link to edit its permissions to make the pages visible to customers. You can also add page permissions to restrict access based on Infusionsoft Tags and Subscriptions.

Visibility & Permissions

When you make the page visible, it is automatically added to the main navigation menu in the customer portal. Click on the **General Info** tab to move it to the sub-menu for one of the other main pages (e.g. the My Account page)

My Account Menu

The My Account Menu gives customers quick access to all of the Account Management tools. If you want this menu to show in the right column of all or most pages, you can copy the page code and use it to create your Default Right Column.

Note: You must link CustomerHub to an Infusionsoft Merchant Account to use the invoice, subscription, and credit card pages.

- Update their profile. This is integrated with Infusionsoft and automatically updates the person's Infusionsoft contact record. They can also visit this page to change their CustomerHub password. The direct URL to this page looks something like this: https://yourappname.customerhub.net/member/edit.

- Make a payment. This links to the default Invoices page where the customer can view outstanding invoices and submit a credit card payment. The payment is processed through the Merchant Account you linked to your CustomerHub account. The customer clicks on Pay Now to submit a payment for invoices with an balance due.
- Update Billing Information. This links to the default Credit Cards page where the customer can view the credit cards associated with their Infusionsoft contact records and add a new card or update an existing card (e.g. billing address or expiration date.) The customer clicks on Update Card to edit billing or card information, or clicks on Add Credit Card to enter the information for a new credit card. Note: Customers are not able to delete credit cards.
- View Subscriptions. This links to the default Subscriptions page where the customer can see a summary of their subscription programs, including the Start Date, Next Bill Date, Price, Cycle (e.g. 1 per month), and the Credit Card being autocharged. The customer is able to switch the card being billed.
- View their Order History. This links to the Invoices page where the customer can view and print invoices. The customer clicks on View Invoice to see the invoice details, such as product(s) purchased, discounts, and previous payments applied. You can add a default Invoice Note (Settings > Account Settings) that is displayed on all invoices viewed through CustomerHub.

Account Pages

There are 3 additional Account Pages (Invoice, Subscriptions, and Credit Card). The purpose of these pages is described above. You are not able to edit the body content of these pages, but you can click on a page to edit the instructions displayed to your customers in the Right column of the page or to display the default right column instead.

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How Members Automatically Cancel Their Own Membership

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If you have a large number of members using your CustomerHub website, you may prefer to have them cancel their own membership to reduce the amount of manual work involved in canceling memberships personally. You can automate the cancellation process using a CustomerHub Action Link following these steps. You will need to go through this process for each of your subscription membership products.

Part 1 - Create a Cancel Subscription Action Set in Infusionsoft

1. Log into Infusionsoft and go to **CRM** > **Settings** and click on the **Add an Action Set** button.

2. Add Actions to tell Infusionsoft what to do automatically when the autocharge for this subscription product fails.
    1. Select **Cancel a Subscription** from the drop-down.
    2. Select one of your subscription products
    3. Save the **Cancel a Subscription** Action.
    4. Select **Apply / Remove Tag** from the drop-down menu
    5. Click on **Create a New** Tag link.
    6. Enter a Tag Name (e.g. Member Cancel Silver). Note: The name should be short and describe the fact that the member canceled their own membership vs. being deactivated for nonpayment.
    7. Enter a Tag Category (e.g. CustomerHub) or choose one from the drop-down.
    8. Click on the **Create this Tag** button.
    9. Save the **Apply / Remove Tag** Action.
    10. Select **Send an Email** from the drop-down.
    11. Select an Email Template to send to the customer to confirm them that their membership has been canceled. If you have not created an appropriate Email Template, click on the **Add** button to create a new one.
    12. Save the Action

3. Save the Action

4. Save the Action Set

Part 2 - Create an Action Link in CustomerHub

1. Log into Customer Hub and go to **Library > Action Links**.
2. Click on **create link**
3. Enter a Name (e.g. Member Cancel Silver). The name should be short and describe the Action that takes place when it is clicked.
4. (Optional) Enter a Permalink (e.g. silvercancel). The Action Link uses the link name by default. This field allows you to customize the link, overriding the default.
5. Save the action before moving forward.
6. Type the name of the cancel Action Set you created (e.g. Member Cancel Silver) and click on its Select link.
7. Select the web page the person will see when the link is clicked.
8. Mark the checkbox to update the Member's CustomerHub permissions instantly. This would downgrade the person's access immediately so that they no longer have access to the related member site content.

Step 3 - Add the Action Link to a Page or Partial

Create a Page or Partial to display the Action Link. If you have multiple membership programs, you may want to create one Page and use Partials with permissions to display the Action Links within that page. The permissions will control which link(s) a member sees when logged into the CustomerHub site. The Action Link will cancel the subscription immediately - as soon as the member clicks on it. Make sure the instructions on the page make this clear.

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Deactivate A CustomerHub Member

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CustomerHub is tightly integrated with your Infusionsoft application. The access permissions you set up in CustomerHub are based on the tags and active subscriptions on members' Infusionsoft contact records. You can automatically disable access automatically based on the following events in Infusionsoft:

- The Subscription is manually inactivated. If the Subscription status is moved from Active to Inactive, the person will no longer have access to the pages that use that Subscription as a criteria.
- Tags are manually removed from a Person Record.
- An Order Trigger automatically inactivates a Subscription or removes Tags. Order Triggers initiate Actions when:
    - A credit card is going to expire
    - An autocharge for a Subscription or Pay Plan fails or succeeds

CustomerHub has provided you with Email Templates, including a collections templates. Log on to CustomerHub and go to **Settings > Application Settings** and click on **publish emails now** to upload them to your Infusionsoft Application.

Be sure to set up a process to reactivate members (when appropriate) when they pay their outstanding membership program balance.

1. To deactivate a member automatically log into Infusionsoft and go to **E-Commerce > Settings**

2. Click on **Billing Automation** in the settings menu.

3. Select **When an auto-charge attempt is made** and click on the **Add Trigger** button.

4. Select **Fails** from the drop-down.

5. Mark the check-box for the **LAST Failure (Max Retry Reached.)** Mark the check-box for the membership subscription product.
   Note: If you have more than one Subscription Plan for a product, you may need to mark more than one checkbox. The Max retry is based on your Infusionsoft Order Settings.

6. Add Actions to tell Infusionsoft what to do automatically when the autocharge for this subscription product fails.

    1. Select **Cancel a Subscription** from the drop-down.
    2. Select the subscription product you entered
    3. Save the **Cancel a Subscription** Action
    4. Select **Apply / Remove Tag** from the drop-down
    5. Click on **Create a New Tag**
    6. Enter a Tag Name (e.g. Silver Member Deactivated). Note: The name should be short and describe the fact that the payment failed.
    7. Enter a Tag Category (e.g. CustomerHub) or choose one from the drop-down.
    8. Click on **Create this Tag**.
    9. Save the **Apply / Remove Tag** Action.
    10. Select **Send an Email** from the drop-down.
    11. Select an Email Template to send to the customer to notify them that their access to that membership content has been deactivated and provide instructions to them about how to reactivate it. If you have not created an appropriate Email Template, click on the **Add** button to create a new one. If you are using the billing and account management tools in CustomerHub, you can invite your customer to log in and submit payment to bring their account balance up-to-date.
    12. Save the Action.
    13. (Optional) Add more Actions if needed.
    14. Click on the **Save Trigger** button.
    15. Repeat this process for each subscription product that sells access to your CustomerHub membership site.

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Automatically Reactivate A Customerhub Member When They Pay Their Balance

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When a member receives notification that one of their CustomerHub memberships has been deactivated, they may decide to pay their outstanding balance and reinstate their membership status. When this happens, you need to make sure that their Infusionsoft contact record is updated accordingly. You will also need to train the responsible Infusionsoft user how to evaluate the payment status for a subscription, delete Tags from a contact record, and update a Subscription Status.

1. To Create a Reactivation Process, log into Infusionsoft and go to **CRM > Settings.** The following process will ensure a member receives a notification automatically when a customer pays a subscription balance and is eligible for reactivation. First you will set up an Action Set in Infusionsoft, then you will link it to your CustomerHub application.
2. Click on **Action Sets** in the settings menu.
3. Click the **Add an Action Set** button and give the action set a name (e.g. CustomerHub: Successful Payment)
4. Select **Apply/Remove Tag** from the **Action** drop-down.
5. Click on **Create a New Tag.**
    1. Enter a Tag Name (e.g. Silver Member Reactivate). The name should be short and describe the need to reactivate the member.
    2. Enter a Tag Category (e.g. CustomerHub) or choose one from the drop-down.
    3. Click on **Create this Tag**.
    4. Mark the **Only run this action when certain rules are met** checkbox.
    5. Click the **Add** button to create a new rule or select an existing rule from the drop-down.
    6. Enter a Name (e.g. If Silver Membership is inactive) and click **Create**.
    7. Click on **Create Criteria** to define the rule criteria.
    8. Select **Contact - General Information** from the Person Field drop-down.
    9. Select **Tags** from the second field drop-down.

10. Click on the Tag (e.g. CustomerHub ->Silver Member Deactivated) you applied to the record when the related membership subscription was deactivated.
11. Click on **Save Criteria**.
12. Click on **Save and Close**.

6. **Save the Action**

7. Repeat this process for each subscription membership you offer. Note: You will need to add a new Apply Tag action to this Action Set each time you add a new membership subscription product to Infusionsoft.

8. Select **Create a Task** from the **Action** drop-down and click on the **Add** button to create a new Task Template.

    1. Enter a template Title (e.g. Reactivate CustomerHub Subscription)

    2. Select Other from the Type drop-down.

    3. Enter a task Title that matches the template Title (e.g. Reactivate CustomerHub Subscription)

    4. Enter the following message into the task Body. These are instructions for the responsible user. This person paid the overdue balance for their membership subscription through CustomerHub. Go to their contact record to confirm their payment status. If they are caught up, remove the Deactivated and Reactivate tags for that membership and edit their subscription to change the Subscription Status from Inactive to Active.

    5. Choose the responsible user from the Assign To: (backup) drop-down.

    6. (Optional) Select Critical from the Priority drop-down.

    7. (Optional) Select the responsible user's name from the user list and possibly a backup person. The users you select here will receive email notification when the task is auto-assigned.

    8. Save the task template.

9. Save the Action.

10. Save the Action Set.

11. Note the Action Set ID - you'll need to use this in CustomerHub. If you do not see the Action Set, use the search box to find it in your list.

12. In CustomerHub, go to **Settings > Application Settings**.

13. Go to the Infusionsoft Action Sets section (near the bottom)

14. Enter the Action Set ID in the Successful CustomerHub Payment Action Set field

15. Click the **Save** button.

16. Go to **Settings** > **Customize Theme** and click on the Stylesheet tab. Paste the following code into the Stylesheet. This code is required to turn off the Inactive Subscription Notice.

    Hide the Inactive Subscription Notice:

```
div#inactive_sub{display:none;}
```

Using a different version of Infusionsoft? Click Here to learn more

Batch Assign CustomerHub Passwords To Your Existing Customers

Last Modified on 06/18/2018 9:23 am MST

When you launch your customer portal, you may want to batch assign passwords to all of your customers so they will be able to access the site without self-registering. You can batch register them as members, or register them as part of your automated billing follow-up process.

When CustomerHub registers members automatically, it generates a unique password for each member. If you batch assign passwords, you are responsible for assigning a unique password to each member. In this case, you may want to use their Contact ID number since each person record is assigned a unique ID and it is easy to populate the Contact ID into the Password field in Infusionsoft.

1. Log into Infusionsoft and go to **CRM** > **Contacts**
2. Enter the search criteria for the people who need passwords or select a Saved Search from the drop-down. Click on the **Start Over** button to clear any previous search criteria.
3. Click on the **Actions** drop-down and Export the file to a .CSV file. Your export file must include the Contact ID and Password fields, but you may also want to include an email address. The email address is the CustomerHub username. If someone does not have an email address, you should contact them to request it.
4. Edit the.CSV file and assign passwords in one of the following ways...
    - Manually enter a unique password for each Contact ID.
    - Copy the IDs from the Contact ID column and paste them into the Password column so that the ID and Password are the same for each contact.
5. Do an Update Import to populate the Password Field for each contact on the list. Note: Your customers are able to customize their password through the View Profile link in your CustomerHub website. You can recommend they do this when you send an email telling them how to access the site.

Using a different version of Infusionsoft? Click Here to learn more

Forgot Password Process For Members

Last Modified on 06/18/2018 9:23 am MST

If a Member has forgotten their password, they can reset it using the forgot password option on your Sign-In page.

1. Click the **forgot my password** link on your sign-in page
2. Enter the email address you used when you signed up and click **Send**.
3. Check your email inbox for the password reset email.
4. Click the link to reset your password.
5. Enter a new password and click the Reset button.
6. You will automatically be signed in to your membership page.

Using a different version of Infusionsoft? Click Here to learn more

Create An Action Link In CustomerHub

Last Modified on 06/18/2018 9:23 am MST

Action Links are website links that are integrated with your CustomerHub website. These links are similar to Infusionsoft's email Automation Link s. Because CustomerHub is tightly integrated with your Infusionsoft Application links, the Action Links can trigger Action Set s in Infusionsoft. These Action Sets automatically make changes to the member's Infusionsoft contact record.

Action Links can be merged into the Pages and Partial s throughout your CustomerHub website. They can be used to:

- Create a one-click upsell using the Create an Order Action in Infusionsoft.
- Give members access to new CustomerHub Pages or Partials using the Create an Order Action (required for paid subscription product content) and / or Apply / Remove a Tag Action.
- Tracking member activity or interests using the Apply / Remove a Tag Action.
- Request assistance using the Create a Task Action.
- Communicate with the Member using the Send an Email Action.
- And more...

Before you create an Action Link in CustomerHub, you will need to create a related Action Set in Infusionsoft (or make sure the Action Set exists). You will search for the Action Set by name in CustomerHub, so it is best-practice to use CustomerHub in the name when you create a new Action Set.

1. Go to **Library** > **Action Links**.

2. Click on **create link**

3. Enter a Name (e.g., Upgrade to Gold Member). The name should be short and describe the Action that takes place when it is clicked.

4. Enter the Link text. This is the hyperlinked text the member will see on the page. This converts the long, ugly URL to a text hyperlink.

5. (Optional) Enter a Permalink (e.g. gold). The Action Link uses the link name by default.

This field allows you to customize the url, overriding the default.

6. Click **Save**
7. Start typing the name of the Action Set you wish to run when someone clicks the link and click the select link next to it. The action set must be created in Infusionsoft before selecting it. If you do not want to run permanent changes, then you do not need to select an action set.
8. In this section, you will define a temporary permission level. You can select a specific permission level or you can select "Create new/custom" and choose which specific tags and/or subscriptions you want to temporarily apply. REMEMBER: When you temporarily apply a permission level, it will temporarily apply every tag/subscription that is associated with that permission level.

   Temporary Permissions are necessary if you want the member to see something change in their current session. These permissions will only be active in the member's active session and will disappear when they sign out of CustomerHub.
9. In this section, you will define which permission level we want to temporarily remove. You can select a specific permission level or you can select **Create new/custom** and choose which specific tags and/or subscriptions you want to temporarily remove. REMEMBER: When you temporarily remove a permission level, it will temporarily remove every tag/subscription that is associated with that permission level.
10. Select the web page the person will see when the link is clicked.

    Most of the time, the customer will go to another CustomerHub page, but you can send them to a custom URL if needed. Here are some possible scenarios:

    - Stay on the page they were viewing when the link was clicked (e.g. If the member clicks on an Upgrade link in a Teaser to unlock a Partial)
    - Go to a Welcome Page for a new Membership Program if they upgraded levels.
    - A web page or Order Form hosted outside of CustomerHub.
11. Click **Save**.

Using a different version of Infusionsoft? Click Here to learn more

Sell Products To CustomerHub Non Members

Last Modified on 06/18/2018 9:23 am MST

You can create targeted product promotions to sell additional products or services to your CustomerHub website members. The sale page or store is built within CustomerHub, and the order is processed by Infusionsoft.

If you are using your membership site to deliver "fremium" content to prospects, then it's possible that some of your members have never purchased anything from you.

You won't have a credit card on file for these members and cannot use the Action Link or a Web Form to create a one click order process in CustomerHub. These members must purchase and checkout through an Infusionsoft order form or the Infusionsoft Shopping Cart.

- If you are using the Infusionsoft Storefront, you can link directly to it.
- You can create a store or product page in Customer Hub and use the product links to create the order through the Infusionsoft Shopping Cart.
- You can feature an individual product and link to an Infusionsoft Order Form or Product Link.
- Provide exclusive promo codes for "members only" discounts.
- Make sure you set up purchase actions on the Shopping Cart or Order Form so that the new customer's record will get updated.

Using a different version of Infusionsoft? Click Here to learn more

Add An Action Link To A Page Or Partial

Last Modified on 06/18/2018 9:23 am MST

After you create an Action Link, you can merge it into CustomerHub Pages and Partial s. The Action Link can be used in more than one place, but the Actions you assigned to it and the Redirect Page will be the same for each instance.

1. To Personalize a CustomerHub Page or Partial, go to Pages (or Partials)
2. Click on the name of the page or partial you wish to edit, or click on the create page button to add a new Page.
3. Go to the Content section and click into the text body to place your cursor where you want to insert personal information.
4. Click on the Action Links media tab, then click on the name of the link you wish to insert.
5. Your link will now be in the content of your page or partial.
6. Save the updated Page or Partial.
7. Test the User Merge fields using the Site Preview feature.

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CustomerHub Auto Login Feature

Last Modified on 06/18/2018 9:23 am MST

The CustomerHub auto-login feature allows your customers to access Infusionsoft through the click of a link; this makes it easier for your members and customers to login quickly without hunting for their login information. You can insert the auto-login link into emails to give your contacts one-click access to your CustomerHub portal. It also allows you to direct members and customers to a specific page in the site (e.g. a new course module) instead of the home page.

The link uses merge field s to pass the contact's email address and password to CustomerHub. It will look like this:

https://yourappname.customerhub.net/web_services/auto_login?email=~Contact.Email~&password=~Contact.Password~&to=permalink.

- Replace "yourappname" with the name of your CustomerHub application
- Replace "permalink" with the permalink for a specific page from CustomerHub.

1. Log into CustomerHub
2. Go to Pages
3. Click on the edit button next to the page name (e.g. Course 1: Planning Your Copy)
4. Click on the General Info tab and copy the permalink for the page. When the contact clicks on the link, the system will automatically populate the email address and password fields into the URL, log them into your CustomerHub account, and display the page you chose (via the permalink.)

Using a different version of Infusionsoft? Click Here to learn more

Tabbed Nav Theme CSS

Last Modified on 06/18/2018 9:23 am MST

Remove the Default Page Titles

```
#page_header{display:none;}
```

Change the Color of Teaser Background (main page)

```
#page_content .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (main page)

```
#page_content .teaser{color:#000000;}
```

Change the Color of Teaser Background (right column)

```
#right .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (right column)

```
#right .teaser{color:#000000;}
```

Change the Color of the Logged in Customer / Member's Name

```
div#top-links {color: #FFFFFF;}
```

Change the color of the View Profile and Logout Top Links in the Customer / Member Portal

```
div#top-links a,div#top-links a:visited{color: #FFFFFF;}
```

Customize Tab Colors on a Per-Page Basis

```
/*This code controls the background color of the tab and the font color of the text di
splayed on it when the page it links to is not currently displayed.*/ul#nav li#premium
-membership a{background-color:#FF9900;color:#FFFFFF}/*This code controls the backgrou
nd color of the tab and the font color of the text displayed on it when a VISITOR's mo
use hovers over it.*/ul#nav li#premium-membership a:hover{background-color:#FFFFFF;col
or:#FF9900}/*This code controls the background color of the tab and the font color of
the text displayed on it when the page it is linked to is displayed in the main conten
t area.*/ul#nav li#premium-membership.current_page a,ul#nav li#premium-membership a:ho
ver{background:#EAEAEA;color:#333333}
```

Note: The tabs are identified based on the perma-link assigned to the page it links to (e.g. premium-membership). Go to Content > Pages and click on the page name. Click on the General Info tab and copy the permalink. Use it to replace the permalink references in the example code. You will also need to customize the highlighted color codes.

Change the Width of File Download Links

```
a.member-file{width:200px;}
```

Remove the View Profile Link from the Member / Customer Portal

```
#view-profile{display:none;}
```

Remove the My Filebox Link from the Member / Customer Portal

```
.filebox-wrapper{ display: none; }
```

Remove the Print Button

```
#print_small{display:none;}
```

Customize the My Filebox Link: Text Color, Background Color, & Size (etc.)

```
a.filebox span{ color: #FFFFFF; background: #E07500; font-size: 10px; font-weight:bold
; padding: 2px 3px; text-shadow: rgba(0,0,0,0.3) 1px 1px 1px; -moz-border-radius: 2px;
-webkit-border-radius: 2px; }
```

Remove the Logo from Right Side Column

```
div#logo{display:none}
```

Add a Logo to Top Header

```
div#header #company_name{clear:both;float:left;margin-top:10px;height:46px;width:300px
;background:url('https://d2ma5jma76a61i.cloudfront.net/images/1076/7017/thumb/logo-bra
nd.png') no-repeat;}div#header h1{display:none;}
```

Note: You must replace the URL highlighted in the code above. Upload the image to CUSTOMERHUB and then view it through Content > Images. Right click on the image link, and selectCopy Link Location from the dropdown. Paste the link in place of the example URL above. You can replace the URL with the URL for an image stored on a secure server outside of CUSTOMERHUB, but may need to add code to scale the image size to make sure it fits in the header space properly.

Using a different version of Infusionsoft? Click Here to learn more

Dropdown V1 Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the drop-down layout for your CustomerHub portal by creating a custom CSS stylesheet (**Settings** > **Customize Theme** > **Stylesheet tab**)

This level of customization requires some basic knowledge of CSS code and hexidecimal color codes. You may need to get assistance from an experienced website administrator.

Here are the CustomerHub drop-down layout CSS ID & Class Names

- div#container
- div#header
- ul#account-bar ul.drop-list
- a.profile-link
- span.dwn profile-link
- ul#account-status ul.right-edge
- div#logo
- div#navigation
- div#navbar
- ul.topnav drop-list
- li.current
- div#content
- div#left
- div#notice
- div.success
- div#page_content
- div#right
- div#footer

Here are some code examples to get you started...

Remove the Default Page Titles

```
#page_title{display:none}
```

Change the Color of Teaser Background (main page)

```
#page_content .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (main page)

```
#page_content .teaser{color:#000000;}
```

Change the Color of Teaser Background (right column)

```
#right .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (right column)

```
#right .teaser{color:#000000;}
```

Change the Width of File Download Links

```
a.member-file{width:200px;}
```

Remove the Print Button

```
#print_small{display:none;}
```

Remove Company Logo from Header

```
div#logo{display:none}
```

Add Custom Background Image to Header

```
#header{background:url(https://d2ma5jma76a61i.cloudfront.net/images/1076/7017/thumb/logo-brand.png) no-repeat; height:150px; width:970px; }
```

Note: You must replace the image URL and the height and width parameters. Upload the image to CustomerHub (Content > Images). After you upload, right click on the image link and copy the link location.

Using a different version of Infusionsoft? Click Here to learn more

Dropdown V2 Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the look of or your CustomerHub portal by modifying the stylesheet associated with the theme (**Settings > Customize Theme > stylesheet** tab)

This level of customization requires some basic knowledge of CSS code and hexidecimal color codes. You may need to get assistance from an experienced website administrator.

Here are the CustomerHub drop-down layout CSS ID & Class Names

- div#container
- div#header
- ul#account-bar ul.drop-list
- a.profile-link
- span.dwn profile-link
- ul#account-status ul.right-edge
- div#logo
- div#navigation
- div#navbar
- ul.topnav drop-list
- li.current
- div#content
- div#left
- div#notice
- div.success
- div#page_content
- div#right
- div#footer

Here are some code examples to get you started...

Remove the Default Page Titles

```
#page_title{display:none}
```

Change the Color of Teaser Background (main page)

```
#content .teaser{background-color:#ccc;}
```

Change the Color of Teaser Text (main page)

```
#content .teaser{color:#000000;}
```

Change the Color of Teaser Background (right column)

```
#sidebar .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (right column)

```
#sidebar .teaser{color:#000000;}
```

Changethe Width of File Download Links

```
a.member-file{width:200px;}
```

Removethe Print Button

```
#print_small{display:none;}
```

Remove Company Logo from Header

```
div#logo{display:none}
```

Add Custom Background Image to Header

```
#header{  background:url('http://farm8.staticflickr.com/7201/6807147216_a908083952_b.j
pg') no-repeat;/* Image by http://www.flickr.com/photos/fireflythegreat */}/* NOTE: fo
r Dropdown V2 you may need to adjust the #logo height if you want to also adjust the h
eader height*/
```

Using a different version of Infusionsoft? Click Here to learn more

Listen Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the CSS of your CustomerHub theme by modifying the stylesheet of the theme (Settings > Customize Theme > stylesheet tab). This level of customization requires some basic knowledge of CSS code and hexadecimal color codes. You may need to get assistance from an experienced website administrator.

Here are some code examples to get you started...

Remove the Default Page Titles

```
#page_title{display:none;}
```

Remove the Right Side Column

```
#sidebar{ display: none; } #content{ width: auto; }
```

Change the Color of the Logged in Customer / Member's Name

```
#account-bar .profile-link{ color: #d00; }
```

Change User navigation sub links

```
#account-bar  ul a, #account-bar ul a:visited{ color: #dd0; }
```

Example PARTIAL Teaser styling (main page)

```
#page_content .teaser{  color: #d00;  padding: 10px;  background: #ccc;}
```

Example PARTIAL Teaser styling (right column)

```
#sidebar .teaser{  color: #d00;  padding: 10px;  background: #ccc; }
```

Change the Width of File Download Links

```
a.member-file { width: 100%; }
```

Remove the My Filebox Link from the Member / Customer Portal

```
#account-bar .filebox{ display: none; }
```

Remove the Print Button

```
#print_small{ display:none; }
```

Customize the My Filebox Link: Text Color, Background Color, & Size (etc.)

```
#account-bar .filebox a {  color: #FFFFFF; background: #E07500; font-size: 10px;  font
-weight:bold;  padding: 2px 3px;  text-shadow: rgba(0,0,0,0.3) 1px 1px 1px;  border-ra
dius: 2px;  -moz-border-radius: 2px;  -webkit-border-radius: 2px; }
```

Add a Logo to Top Header

```
#header{  background:url('http://farm8.staticflickr.com/7201/6807147216_a908083952_b.j
pg') no-repeat; /*Image by http://www.flickr.com/photos/fireflythegreat */
```

Using a different version of Infusionsoft? Click Here to learn more

Empower Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the CSS of your CustomerHub theme by modifying the stylesheet of the theme (Settings > Customize Theme > stylesheet tab). This level of customization requires some basic knowledge of CSS code and hexadecimal color codes. You may need to get assistance from an experienced website administrator.

Here are some code examples to get you started...

Remove the Default Page Titles

```
#page_title{display:none;}
```

Remove the Right Side Column

```
#sidebar{ display: none; } #content{ width: auto; }
```

Change the Color of the Logged in Customer / Member's Name

```
#account-bar .profile-link{ color: #d00; }
```

Change User navigation sub links

```
#account-bar  ul a, #account-bar ul a:visited{ color: #dd0; }
```

Example PARTIAL Teaser styling (main page)

```
#page_content .teaser{   color: #d00;   padding: 10px;   background: #ccc;}
```

Example PARTIAL Teaser styling (right column)

```
#sidebar .teaser{   color: #d00;   padding: 10px;   background: #ccc; }
```

Change the Width of File Download Links

```
a.member-file { width: 100%; }
```

Remove the My Filebox Link from the Member / Customer Portal

```
#account-bar .filebox{ display: none; }
```

Remove the Print Button

```
#print_small{ display:none; }
```

Customize the My Filebox Link: Text Color, Background Color, & Size (etc.)

```
#account-bar .filebox a {   color: #FFFFFF; background: #E07500; font-size: 10px;   fo
nt-weight:bold;   padding: 2px 3px;   text-shadow: rgba(0,0,0,0.3) 1px 1px 1px;   bord
er-radius: 2px;   -moz-border-radius: 2px;   -webkit-border-radius: 2px; }
```

Add a Logo to Top Header

```
#banner{   background:url('http://farm8.staticflickr.com/7201/6807147216_a908083952_b.
jpg') no-repeat; /*Image by http://www.flickr.com/photos/fireflythegreat */
```

Using a different version of Infusionsoft? Click Here to learn more

Dream Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the CSS of your CustomerHub theme by modifying the stylesheet of the theme (Settings > Customize Theme > stylesheet tab). This level of customization requires some basic knowledge of CSS code and hexadecimal color codes. You may need to get assistance from an experienced website administrator.

Here are some code examples to get you started...

Remove the Default Page Titles

```
#page_title{display:none;}
```

Remove the Right Side Column

```
#sidebar{ display: none; } #content{ width: auto; }
```

Change the Color of the Logged in Customer / Member's Name

```
#account-bar .profile-link{ color: #d00; }
```

Change User navigation sub links

```
#account-bar  ul a, #account-bar ul a:visited{ color: #dd0; }
```

Example PARTIAL Teaser styling (main page)

```
#page_content .teaser{  color: #d00;  padding: 10px;  background: #ccc;}
```

Example PARTIAL Teaser styling (right column)

```
#sidebar .teaser{  color: #d00;  padding: 10px;  background: #ccc; }
```

Change the Width of File Download Links

```
a.member-file { width: 100%; }
```

Remove the My Filebox Link from the Member / Customer Portal

```
#account-bar .filebox{ display: none; }
```

Remove the Print Button

```
#print_small{ display:none; }
```

Customize the My Filebox Link: Text Color, Background Color, & Size (etc.)

```
#account-bar .filebox a {  color: #FFFFFF; background: #E07500; font-size: 10px;  font
-weight:bold;  padding: 2px 3px;  text-shadow: rgba(0,0,0,0.3) 1px 1px 1px;  border-ra
dius: 2px;  -moz-border-radius: 2px;  -webkit-border-radius: 2px; }
```

Add a Logo to Top Header

```
#sidebar{  background:url('http://farm8.staticflickr.com/7201/6807147216_a908083952_b.
jpg') no-repeat; /*Image by http://www.flickr.com/photos/fireflythegreat */ }
```

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Optimus V1 Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the CSS of your CustomerHub theme by modifying the stylesheet of the theme (Settings > Customize Theme > stylesheet tab). This level of customization requires some basic knowledge of CSS code and hexadecimal color codes. You may need to get assistance from an experienced website administrator.

Here are some code examples to get you started...

Remove the Slash Marks (//)

```
.slash{display:none;}
```

Change the Color of Teaser Background (main page)

```
#page_content .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (main page)

```
#page_content .teaser{color:#000000;}
```

Change the Width of File Download Links

```
a.member-file{width:200px;}
```

Remove the My Filebox Link from the Member / Customer Portal

```
.filebox{display:none;}

Note: You should not remove the My Filebox link unless you do not use the Member Files
feature or if you link to files using the File merge links in individual portal pages.
```

Note: You should not remove the My Filebox link unless you do not use the Member Files feature or if you link to files using the File merge links in individual portal pages.

Remove the Print Button

```
#print_small{display:none;}
```

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Optimus V2 Theme CSS

Last Modified on 06/18/2018 9:23 am MST

You are able to modify the CSS of your CustomerHub theme by modifying the stylesheet of the theme (Settings > Customize Theme > stylesheet tab). This level of customization requires some basic knowledge of CSS code and hexadecimal color codes. You may need to get assistance from an experienced website administrator.

Here are some code examples to get you started...

Remove the Slash Marks (//)

```
.slash{display:none;}
```

Change the Color of Teaser Background (main page)

```
#content .teaser{background-color:#FFFFFF;}
```

Change the Color of Teaser Text (main page)

```
#content .teaser{color:#000000;}
```

Change the Width of File Download Links

```
a.member-file{width:200px;}
```

Remove the My Filebox Link from the Member / Customer Portal

```
.filebox{display:none;}

Note: You should not remove the My Filebox link unless you do not use the Member Files feature
```

Note: You should not remove the My Filebox link unless you do not use the Member Files feature or if you link to files using the File merge links in individual portal pages.

Remove the Print Button

```
#print_small{display:none;}
```

Using a different version of Infusionsoft? Click Here to learn more

CustomerHub Facebook Integration

Last Modified on 06/18/2018 9:23 am MST

Raise member engagement to the next level with the CustomerHub Facebook integration. Members can like, share, comment, even chat with other members. There are 3 main benefits:

- Member Engagement & Retention: Facebook comments, activity feeds, and Live Stream drive engagement. These Facebook tools allow members to see what other members think about your content and the ideas it inspires. Your members contribute to the site value by enriching the content you provide. This type of interaction fosters relationships that motivate people to keep coming back.
- Content Assessment: The Facebook Comments, Facepile, and Sharing tools allow you to assess your content. You'll be able to see how many of your members promote you on Facebook as well as get their feedback about the content they are consuming. The feedback allows you to assess and improve site content or get ideas for adding new content.
- Promote & Grow: The Facebook Sharing, Comments and Activity Feed tools can post comments to your members' Facebook wall. This increases your reach by making your CustomerHub content visible to your members' friends. When a Facebook Friend who is not a member clicks the link, they can find out more about your membership program and sign up! This is a low-cost marketing channel that taps into the power of friend recommendations and social exposure.

1. To Enable the Facebook Integration, login to Facebook as the person you want to moderate comments

2. Go to **Settings** > **Add-Ons**

3. Click on the **more info** link. This will open a new browser tab. Keep both tabs open as you will be copying information between them.

4. Enter your Facebook ID. To obtain your Facebook ID, sign into Facebook and click on your name. Your Facebook ID is the last part of the URL. (https://www.facebook.com/user.name

   Pro Tip! If you have more than one administrator, you can enter multiple Facebook IDs separated by commas.

5. Go to Step 2 - Create a Facebook App and click on the click here link to go to the Facebook Developers site and create a Facebook App.

6. Click on the **Register as a Developer** button.

7. Click **Continue**

8. Choose a category for your app or just click the **Skip** button.

9. Click the **Create New App** button.

10. Enter an App Name (e.g. CustomerHub Chamber) and click Continue. This is the name for the app that is displayed to its users.

11. Copy the App ID and App Secret and paste these codes into CustomerHub.

12. Enter the URL for your Facebook Business Page (not personal profile.) The "Likes" you receive through CustomerHub will be attributed to this page.

13. Enter a redirect URL

    This is the page that non-members will see when they click on a membership site link that members share on Facebook. These non-members are good prospects since they've expressed an interest in a topic related to your membership program. This redirect URL should go to a signup page where that person can learn more about your membership program and enroll in it.

14. Click on **Enable This add-on**

15. Switch back to the Facebook app setup page. Click on the **Website with Facebook Login** and enter your CustomerHub URL.

16. Click on **Save Changes**

17. This completes the setup process. You can now add Facebook features to your CustomerHub Pages and Partials and moderate the interactions through Facebook.

Using a different version of Infusionsoft? Click Here to learn more

Customize The Facebook Add On In CustomerHub

Last Modified on 06/18/2018 9:23 am MST

You can modify the look and feel of the Facebook add-on through**Settings > Integrations**. These settings adjust the color and size of the various Facebook tools. You may need to adjust these settings so that the Facebook tool fits properly in your CustomerHub site pages. These are global settings that update the specific tool(s) wherever it is used.

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Insert Like And Send Buttons In CustomerHub

Last Modified on 06/18/2018 9:23 am MST

The Facebook integration allows you to add a Like & Send button to pages and partial s so that your CustomerHub members can share content. When someone "likes" a page in your CustomerHub website, they are added to the Facepile display.

- **The Like Button**: The Like button lets people quickly share content with their friends. A single click on the button will 'like' pieces of content on the web, which shares them back to Facebook, where they can be seen by friends and re-shared. When a follower who is also a member of your CustomerHub site clicks on this link, they can log into your site and view the shared content. When a follower who is not a member clicks on the link, they will go to the Redirect URL you set up when you enabled the Facebook integration.
- **The Send Button**: When a member clicks on the Send button, they are able to send a private message to a Facebook friend or any email address. The member's friend receives a direct message that includes a link to the CustomerHub page. If they are not a member, they are taken to the Redirect URL you entered into the Facebook Add-On settings.

1. To Add the Facebook Like & Send Button to a CustomerHub Page, go to **Pages**.
2. Open the Page or Subpage you want to edit.
3. Put your cursor in the page editor to select a location for the Like button (above or below the page content.)
4. Click on the **Facebook merge** icon
5. Click on the **Like Button** link to add the button to the page.
6. **Save** the Page.

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Insert A Facebook Comment Button In CustomerHub

Last Modified on 06/18/2018 9:23 am MST

The Facebook comments feature allows your members to post feedback or thoughts about the content they are viewing on the page (e.g. a featured video). This powerful tool adds a "community" type interaction to any page of your membership site.

Through the Comments section, your members can:

- Share a comment or ask a question about the page content
- Post the comment or question to their own Facebook profile page
- Reply to another member's comment or question
- Add other members to their own Facebook network
- Follow discussions that they are participating in, or ones that interest them, even if they are not participating

1. To Add the Facebook Comments Feature to a CustomerHub Page, go to Pages

2. Open a Page or Subpage to edit it.

3. Click on the **General Info** tab

4. Go to the Facebook Comments section and mark the check-box to turn on the comments.

5. (Optional) Enter a width (e.g. 300px) to adjust the width of the comments display, if needed.

6. **Save** the changes

7. To Moderate All Site Comments, Log into Facebook and CustomerHub.

   After you add Facebook Comments to your CustomerHub website pages, you need to make sure you monitor them. The comments may include questions, feedback, requests for help, or ideas for additional content. The Facebook Comments tool is a two-way conversation. You want to make sure someone is dedicated to responding when appropriate.

You can either moderate comments by viewing individual pages or view all of the site comments through Facebook.

To be a moderator, you must be logged into Facebook and Customer Hub AND your Facebook profile must be listed in the CustomerHub Facebook Settings. If more than one person is responsible for moderating comments you can enter multiple profile IDs into this field (Settings > Add-Ons)

8. Go to **Library > Comments** in CustomerHub. This will take you to the Facebook Comment Moderation Tool.

9. Click on the **Moderator View** link. All of the Comments are public by default, but the Moderator can hide them.

10. (Optional) Click on the **Settings** link to change the default Comment settings.

    If you choose to approve comments, they will not show up in CustomerHub until the moderator approves them. If you want to allow as many comments as possible, but want to keep inappropriate or "spammy" comments to a minimum, you can configure Blacklisted words. Save the changes.

Facebook Live Stream In CustomerHub

Last Modified on 06/18/2018 9:23 am MST

The Facebook Live Stream allows your CustomerHub site members to communicate in real time, like the Chat function in Facebook. It encourages interaction during live events like a live streaming video, speech, webcast, or live webinar. You can also host live chats around a specific topic within your CustomerHub application, encouraging a discussion group or mastermind-type interaction. The Live Stream displays comments from members who are logged into Facebook during the discussion. There is no moderation tool for the Live Stream - all comments are posted immediately. If you want to moderate, you will need to use the Comments option instead.

1. To Add the Facebook Live Stream to a Page, go to **Pages**.
2. Open the Page or Subpage you want to edit.
3. Put your cursor in the page editor to select a location for the Like button (above or below the page content)
4. Click on the **Facebook merge** icon
5. Click on the **Live Stream** link to add it to the page
6. **Save** the Page

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Facebook Activity Feed And Facepile With Customerhub

Last Modified on 06/18/2018 9:23 am MST

The Facebook Activity Feed adds value to your site by giving members a glimpse into how others in their network are engaging with your CustomerHub content. As your members develop relationships with one another by "friending" each other on Facebook, they'll see updates as the people in their network "Like" and comment on videos, pages, and other membership site content. This encourages interaction and draws attention to the content that is most popular with other members. Each logged on member will see a personalized activity stream that displays Friend activity.

The Facebook Activity Feed adds value to your site by giving members a glimpse into how others in their network are engaging with your CustomerHub content. As your members develop relationships with one another by "friending" each other on Facebook, they'll see updates as the people in their network "Like" and comment on videos, pages, and other membership site content. This encourages interaction and draws attention to the content that is most popular with other members. Each logged on member will see a personalized activity stream that displays Friend activity.

You might want to add the Activity Feed or Facepile to the main page of your Membership site or to the Right Column (so that it shows up to the right of most / all of your pages.)

1. To Add the Facebook Activity Feed or Facepile, go to Pages (or **Settings** > **Theme** > **Default Right Column**.)
2. Open the Page or Subpage you want to edit
3. Put your cursor in the page editor to select a location for the Like button (above or below the page content)
4. Click on the **Facebook merge** icon
5. Click on the **Activity Feed or Facepile** link to add it to the page.
6. **Save** the Page

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Gmail Sync Vs Outlook Sync

Last Modified on 08/02/2018 4:03 pm MST

Features	Gmail Sync	Outlook Sync
Supported		
Chrome, Firefox	Yes	No
Outlook 2010, 2013, 2016, Office 365 (Desktop Versions ONLY Excluding MAC)	No	Yes
Using on Multiple Computers at the same time	Yes	No
Email		
Manually Sync 1 Email	No	Yes
Automatically Sync Emails	Yes	No
Retro-Actively Sync Emails	No	Yes (Manually)
Time it takes to show up inside of Infusionsoft	30 min - 2 hr	Immediately
Sidebar		
Display Tasks & Appointments	Yes	Yes
Display Notes & Completed Tasks	Yes	Yes
Display Follow-up Sequence (Legacy)	Yes	Yes
Display Tags	Yes	Yes
Display Opportunities	Yes	No
Display All Contact Fields	Yes	No
Display Filebox	Yes	Yes
Add Tasks & Appointments	Yes	Yes

Features	Gmail Sync	Outlook Sync
Add Notes	Yes	Yes
Add Person to Follow-up Sequence (Legacy)	Yes	Yes
Apply Tag (will trigger campaign goals for automation)	Yes	Yes
Add Opportunity	Yes	No
Add Files	Yes	Yes
Create Tag	Yes	No
Add people directly to a camapaign builder sequence	No	No
Show/Hide Areas of sidebar	Yes	No
Edit the Contact Record	Yes	No
Calendar Not on Sidebar		
Sync Appointments from Infusionsoft to Plugin	Yes	Yes
Sync Tasks from Infusionsoft to Plugin	Yes	Yes
Sync Appointments from Plugin to Infusionsoft	No	Yes
Sync Tasks from Plugin to Infusionsoft	No	Yes
Time to wait on sync	30min - 1hr	30min - 1hr
Date Format Settings (Appointment/Task will come in on the wrong day if this is not set correctly)		
Allow MM/DD/YYYY	Yes	Yes
Allow DD/MM/YYYY	Yes	Yes

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Install Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:03 pm MST

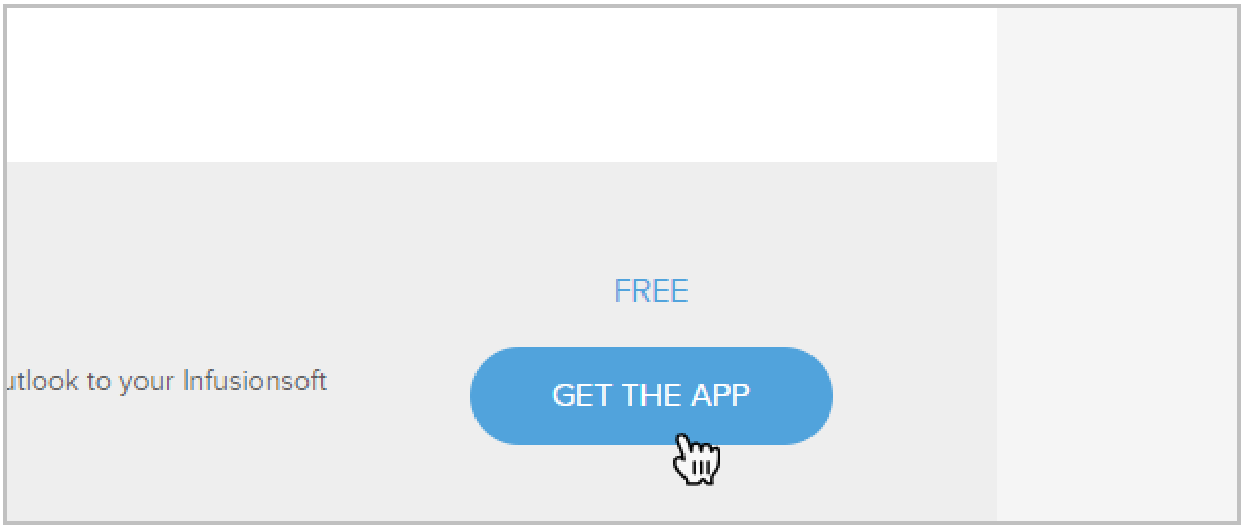
With the plugin, you will be able to do the following from Outlook:

- View contact information stored in Infusionsoft
- Add a new person to Infusionsoft
- Apply or Remove Tags from an Infusionsoft contact record
- Start or Stop a Follow-Up Sequence for an Infusionsoft contact
- Record email communications to Infusionsoft
- Schedule Tasks and Appointments in Infusionsoft

1. Before beginning the installation process, be sure to close Microsoft Outlook.

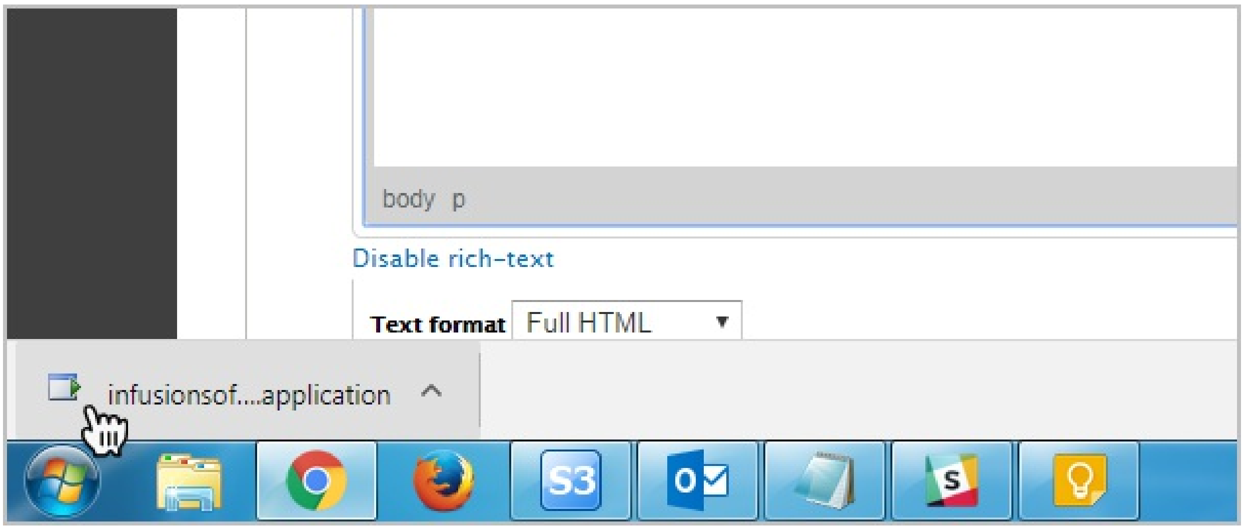
2. Click here to access Infusionsoft Sync for Outlook the marketplace.

3. Click the **Get the App** button at the bottom of that page.



4. Follow the instructions on the page to download the Outlook Plugin.

5. Run the application to install the plugin to your computer



6. Once the installation is complete, Open Outlook to begin using the Infusionsoft Sync sidebar

Using a different version of Infusionsoft? Click Here to learn more

Add A Contact To A Sequence Using Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:04 pm MST

1. Click the **Start a sequence** link or the **+** symbol in the **Follow-up Sequences** section.
2. Select the **Follow-up Sequence** from the drop-down.
3. Click the **Start Sequence** button.

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Tag A Contact In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:04 pm MST

1. Click the **Add a tag** link or the plus (+) symbol in the **Tags** section.
2. Select the tag category.
3. Check the tags you would like to apply.
4. Click the **Add to Infusionsoft** button.

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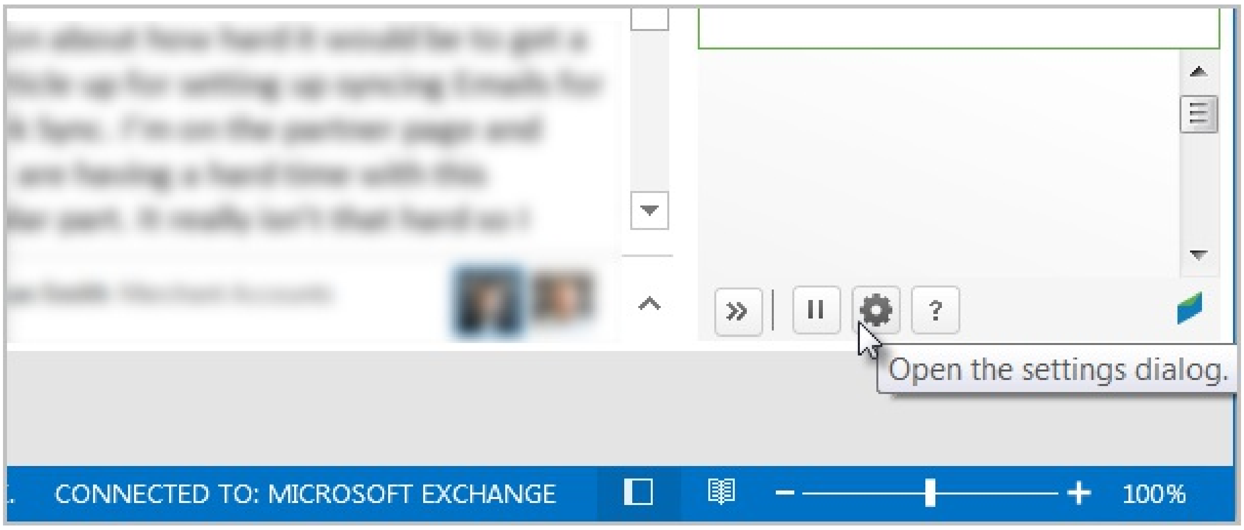
Synchronize Tasks And Appointments Between Infusionsoft And Outlook

Last Modified on 08/02/2018 4:04 pm MST

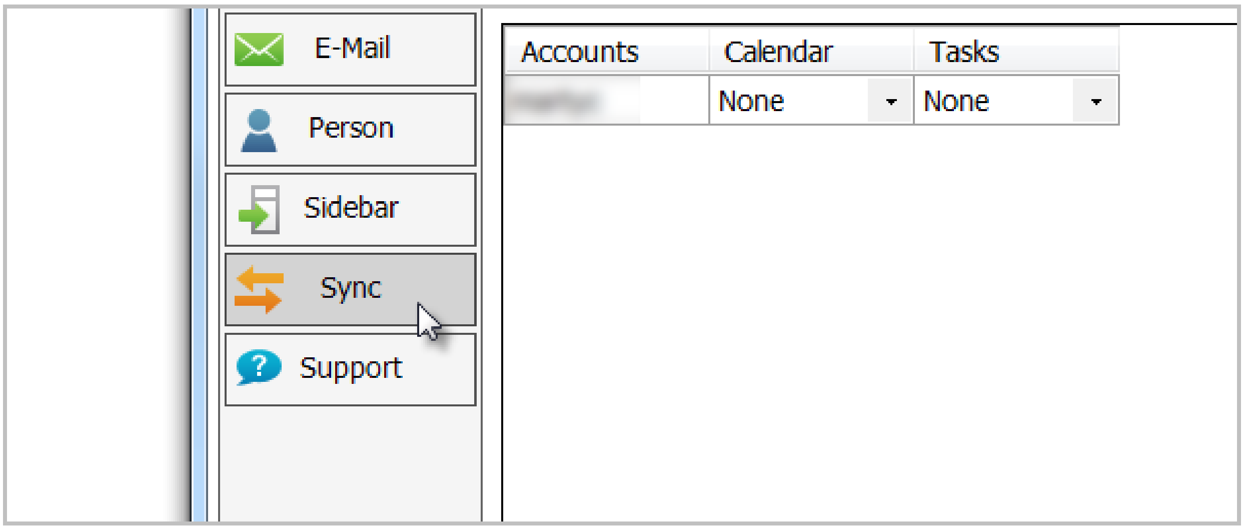
Please note the following:

- Syncing is turned off by default
- Recurring tasks and appointments will sync, but the "recurrence information" will not sync. Instead of being linked in a recurring set, each task and appointment will look separate and unique. Any options configured in the recurring tab for Tasks/Appointments in Infusionsoft will not sync to Outlook and vice versa.
- Reminders will not be synced.
- Appointments will be synced 31 days forward and tasks will be synced 7 days forward. If an appointment or task falls outside of those parameters, it will not sync until it comes within those parameters.
- The sync option will only be visible if you're running Outlook 2007 or later. Sync functionality is not available for Outlook 2003.
- If you want to delete a series of recurring appointments or tasks, they must be deleted from the source application. If they are not deleted form the source application, you will have to delete them individually.
- Individual items generally take 30 minutes to sync. So please be patient.

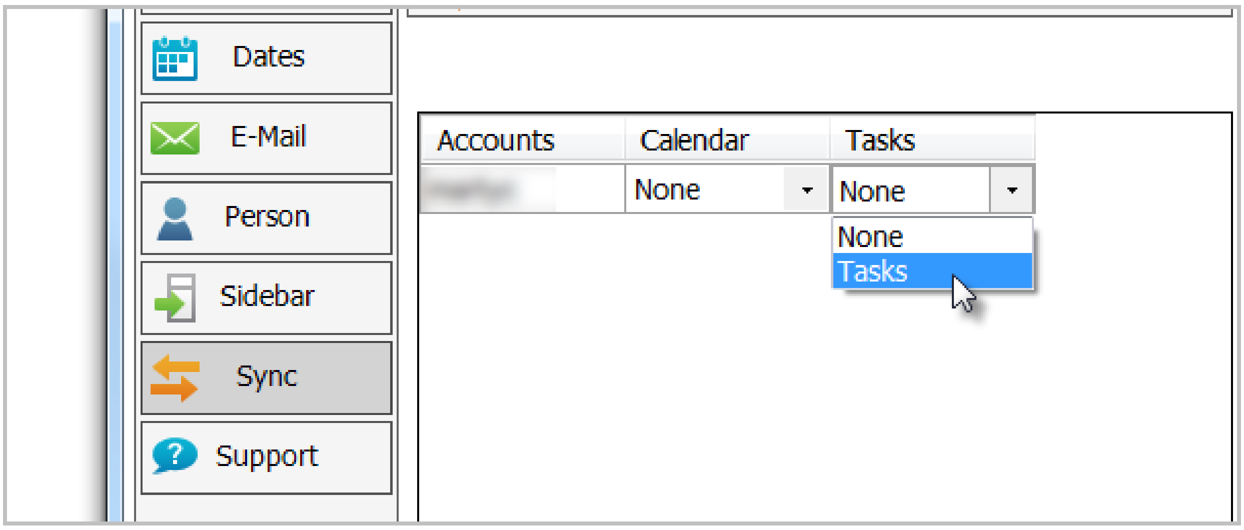
1. Open the settings menu by clicking the gear icon at the bottom of the sidebar.



2. Click **Sync** on the left side of the window.



3. Choose the Infusionsoft account (if you have more than one), then select what you would like to sync.



4. Click the **OK** button at the bottom.

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Attach A File To A Contact In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:09 pm MST

File Size Limits: Each file is limited to 10MB each.

1. Click the **Add files** link or the + (plus) symbol on the **Filebox** section.
2. Click the folder icon to select a file to upload. You can add another file, by clicking the folder again and selecting a second file.
3. Click the **Add to Infusionsoft** button.

Manage Preferences In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:06 pm MST

Click the gear icon to access your settings.

Login

This section allows you access to your sign in information. You can also customize proxy settings if your network requires it.

Dates

Use this to change the date format to the one used by your Infusionsoft application.

E-Mail

These settings allow you to choose your attachment preferences.

Person

If you have changed the phone types in Infusionsoft, you can enter them here.

Sidebar

This allows you to hide the sidebar from Outlook and change the location of the sidebar.

Sync

This allows you to enable syncing appointments and tasks between Outlook and Infusionsoft

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Add Contacts In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:10 pm MST

1. Select the email in your Outlook inbox. If an email address doesn't exist for the person in Infusionsoft, you can click the **Add to Infusionsoft** button.
2. Fill out the contact details of this person
3. Click the **Add to Infusionsoft** button

Locate in Infusionsoft. If the contact record exists in Infusionsoft under a different email, you can click the Locate in Infusionsoft button and either replace the email in Infusionsoft or add the email to a secondary email address field.

1. Click the **Locate** in Infusionsoft button
2. Search for the contact record in Infusionsoft
3. Either replace the Infusionsoft email with the new one or add it to a secondary email address field.

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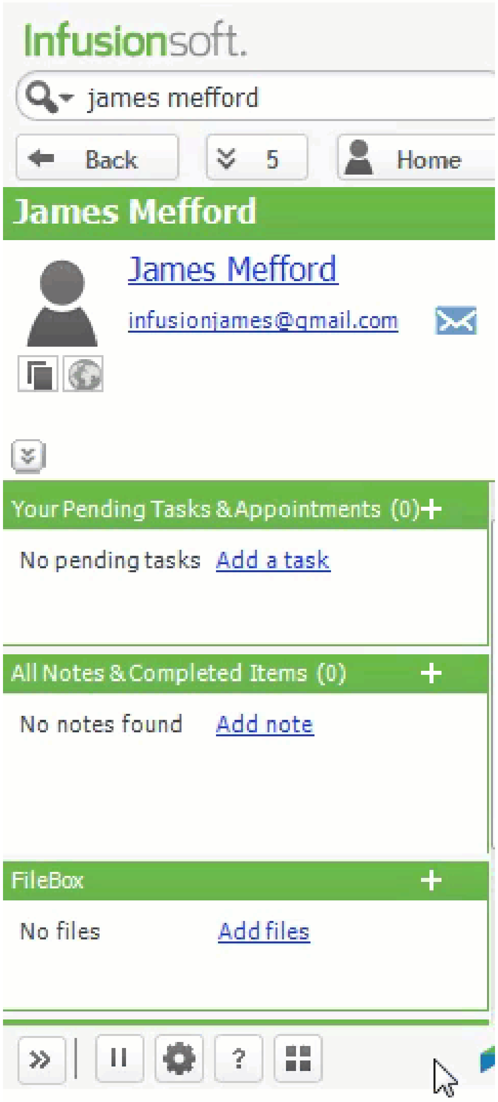
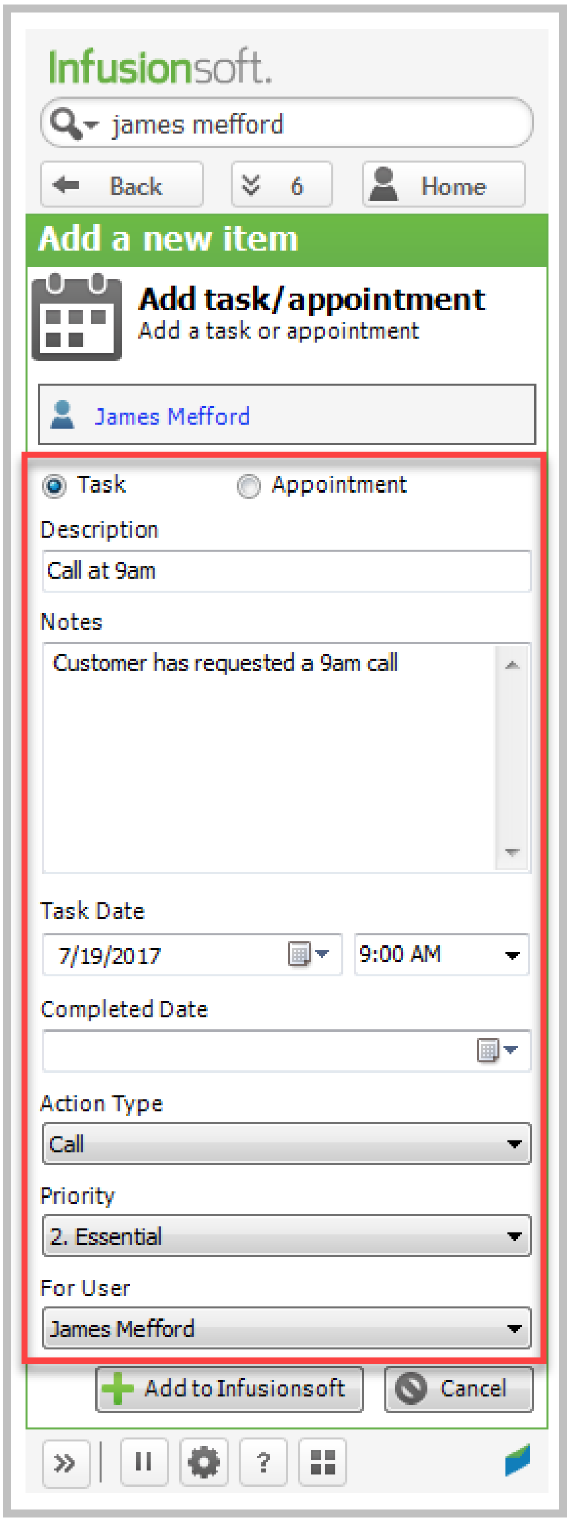
Add A Task Or Appointment In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:09 pm MST

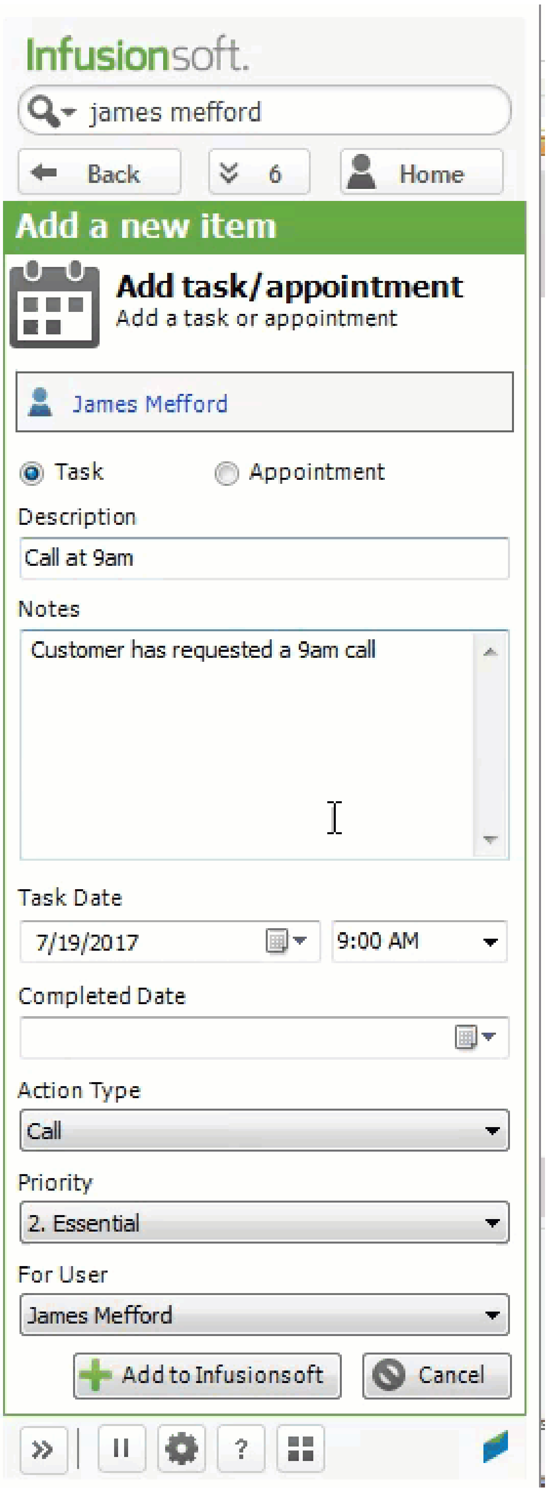
1. Click the **Add a task** link under the Your Pending Tasks & Appointments section.



2. Choose either a task or appointment and populate the fields.



3. Click **Add to Infusionsoft**


Infusionsoft.
james mefford
Back
6
Home
Add a new item
Add task/appointment
Add a task or appointment
James Mefford
Task
Appointment
Description
Call at 9am
Notes
Customer has requested a 9am call
Task Date
7/19/2017
9:00 AM
Completed Date
Action Type
Call
Priority
2. Essential
For User
James Mefford
Add to Infusionsoft
Cancel

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Add A Note To A Contact In Infusionsoft Sync For Outlook

Last Modified on 08/02/2018 4:10 pm MST

1. Click + (plus) to the right of **All Notes & Completed Items** to create a new note.
2. Fill in the fields
3. Select the Action Type
4. Click the **Add to Infusionsoft** button.

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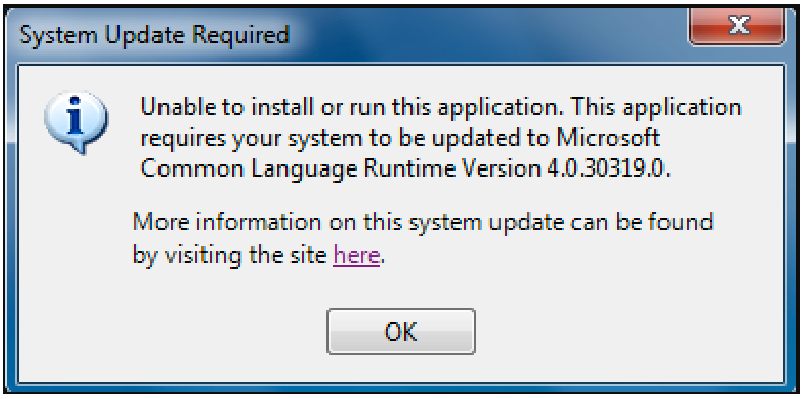
Infusionsoft Sync For Outlook Installer Help Page

Last Modified on 08/02/2018 4:11 pm MST

1. Click Here to install Microsoft .NET Framework 4.7 from the Microsoft website.

2. Once .NET framework 4.7 has been installed, run the Infusionsoft Sync for Outlook Installer.

3. If the following error message persists (shown below), contact customer service.



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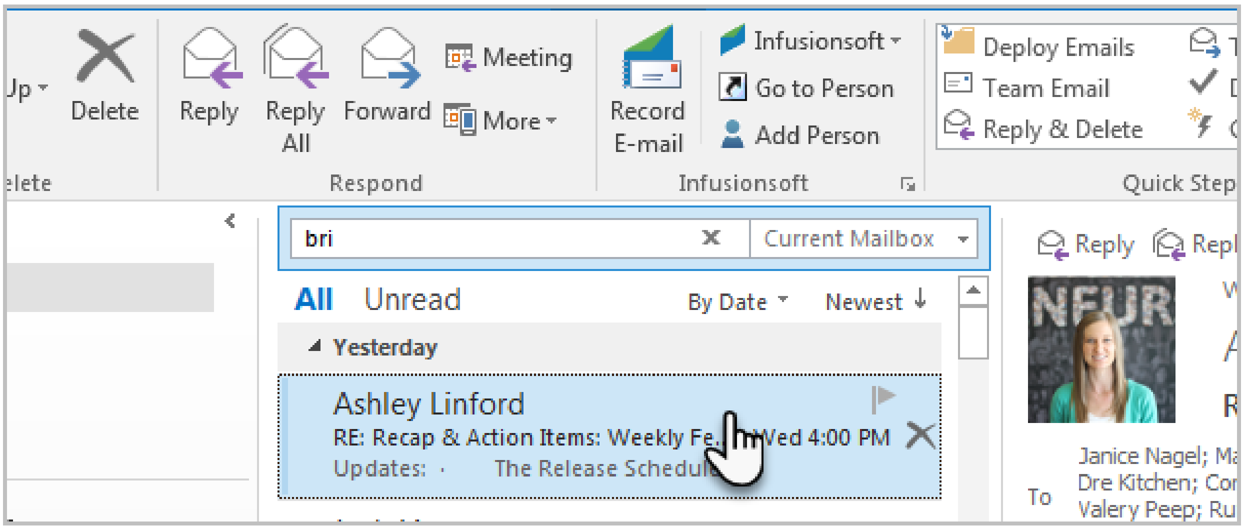
Record an Email in Infusionsoft Using the Outlook Plugin

Last Modified on 08/02/2018 4:11 pm MST

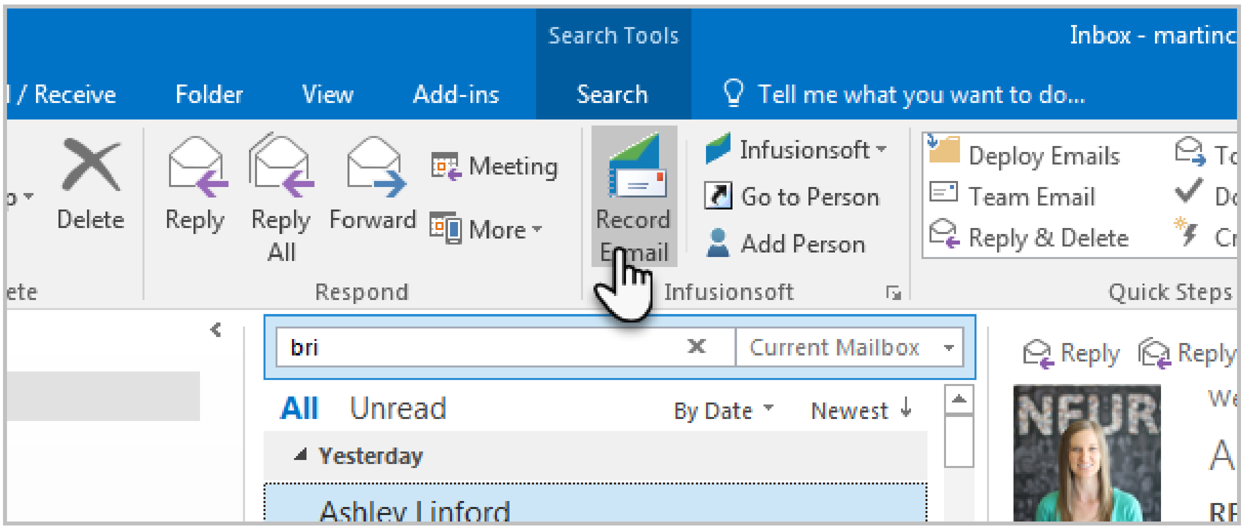
The Infusionsoft Outlook Sync allows you to record emails from Outlook into your Infusionsoft app. You can do this while browsing through your emails in Outlook or when sending an email from Outlook.

To record an email into Infusionsoft while browsing your inbox:

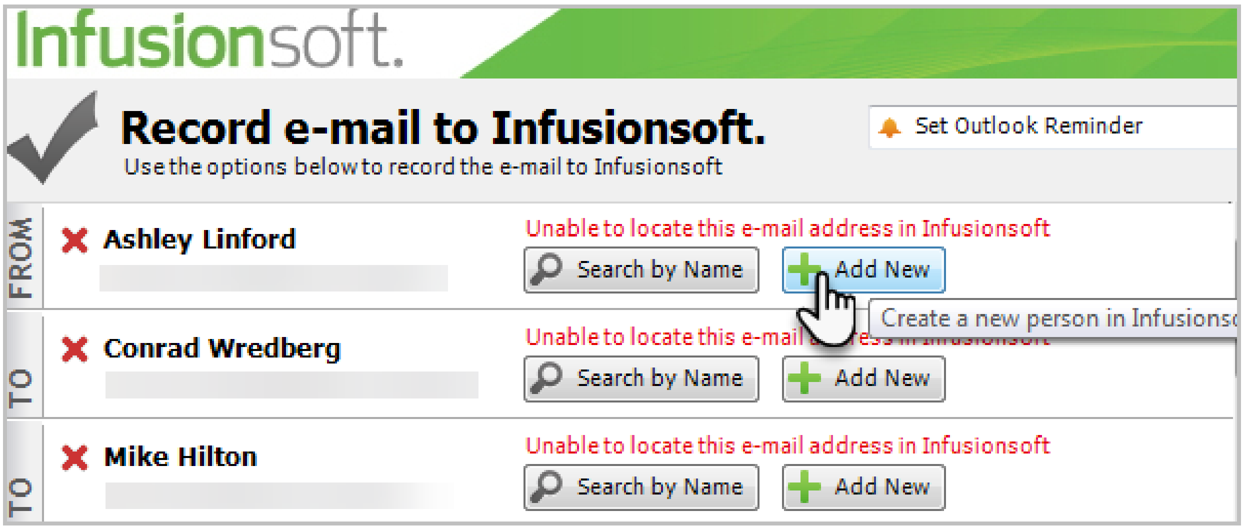
1. Select the email you want to save to Infusionsoft



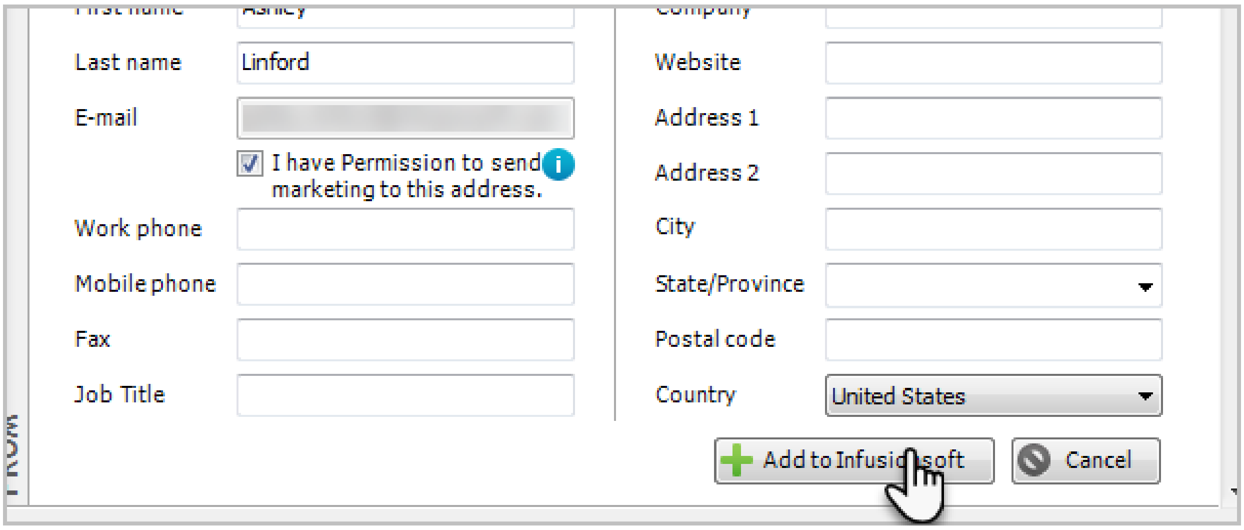
2. Click the **Record Email** button



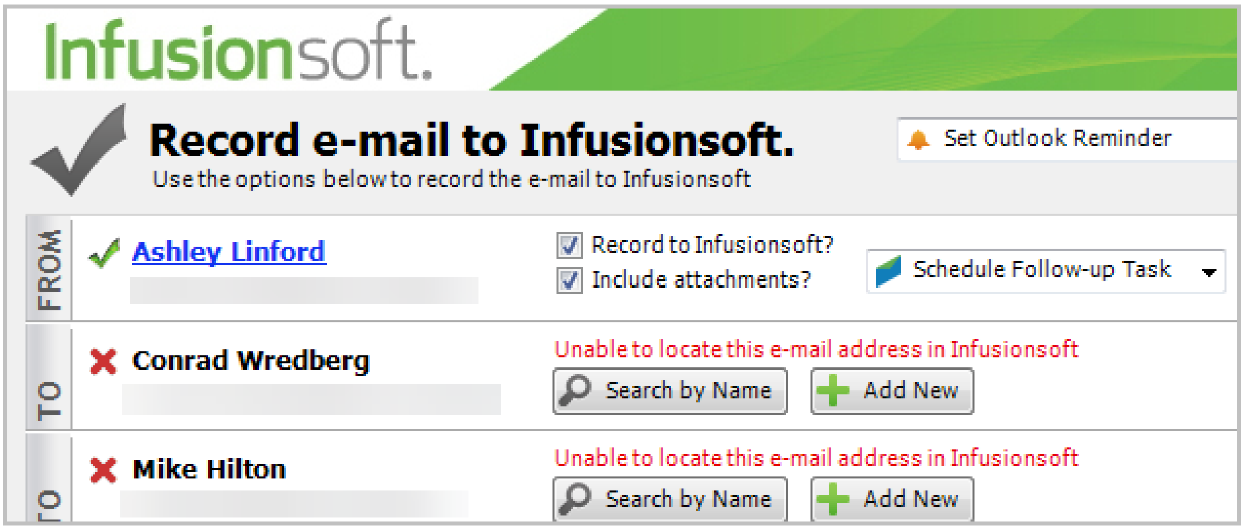
3. Infusionsoft will try to find the contact in Infusionsoft. If there is no match, you can click the **Add New** button to create the contact record.



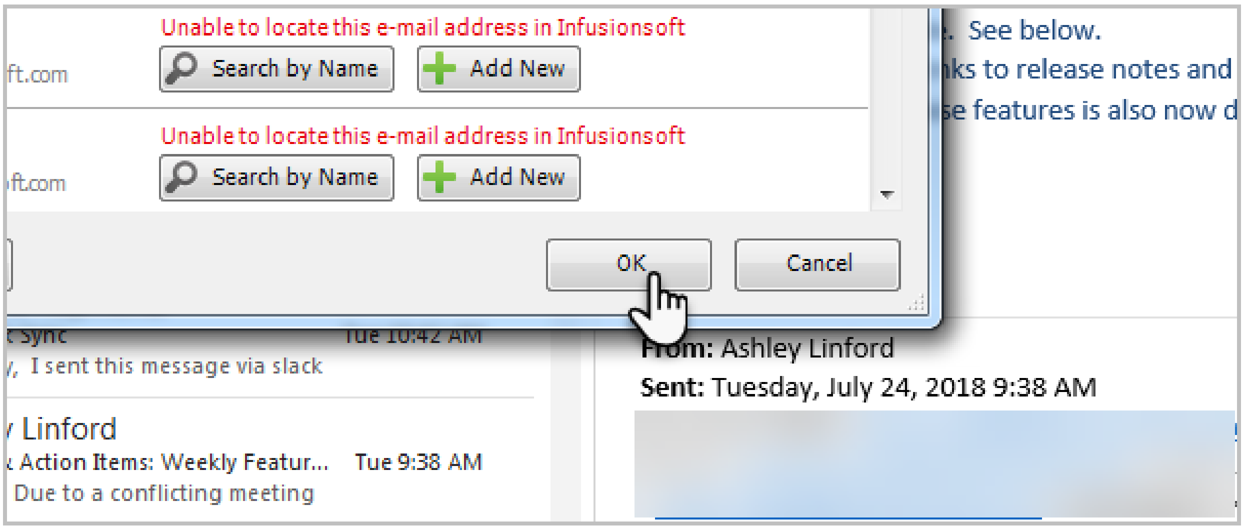
4. After clicking Add New, you can provide any further personal details prior to saving the contact in Infusionsoft.



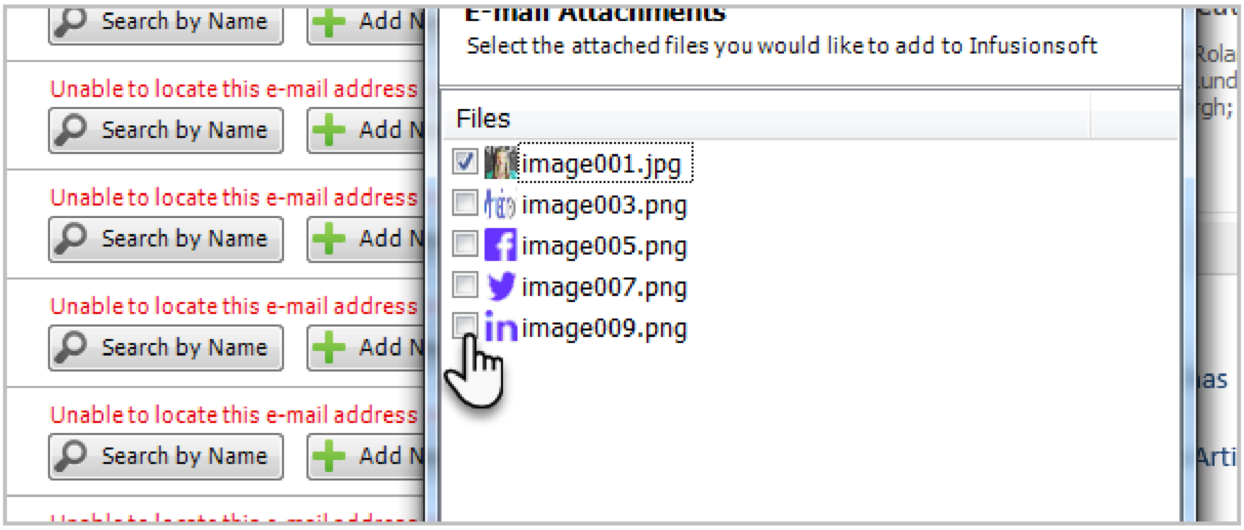
5. The checkbox indicates that the contact has been added to Infusionsoft. You can now record the email to their contact record.



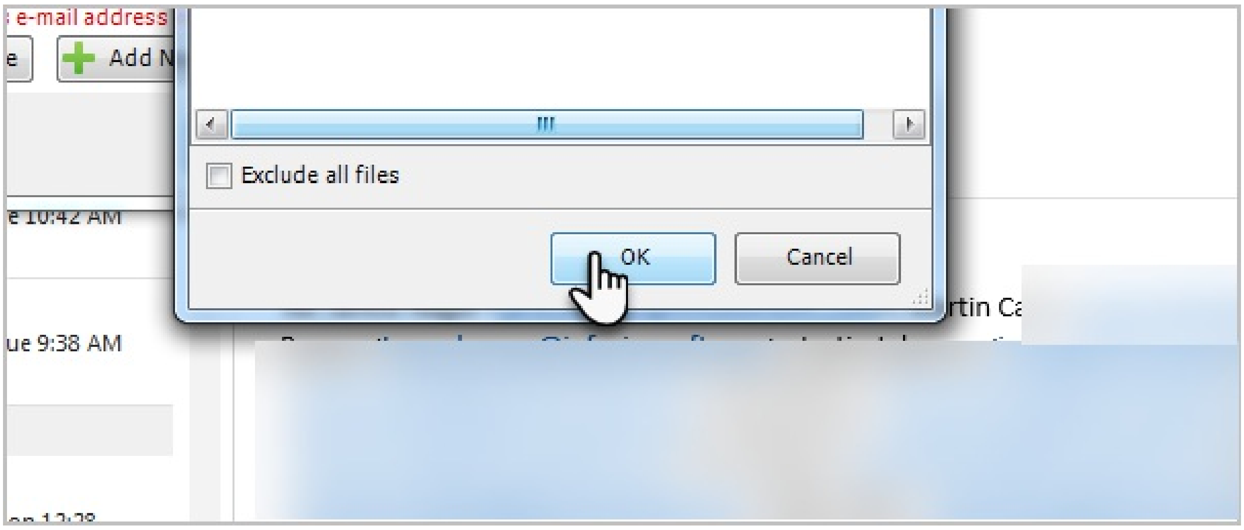
6. Click **OK**



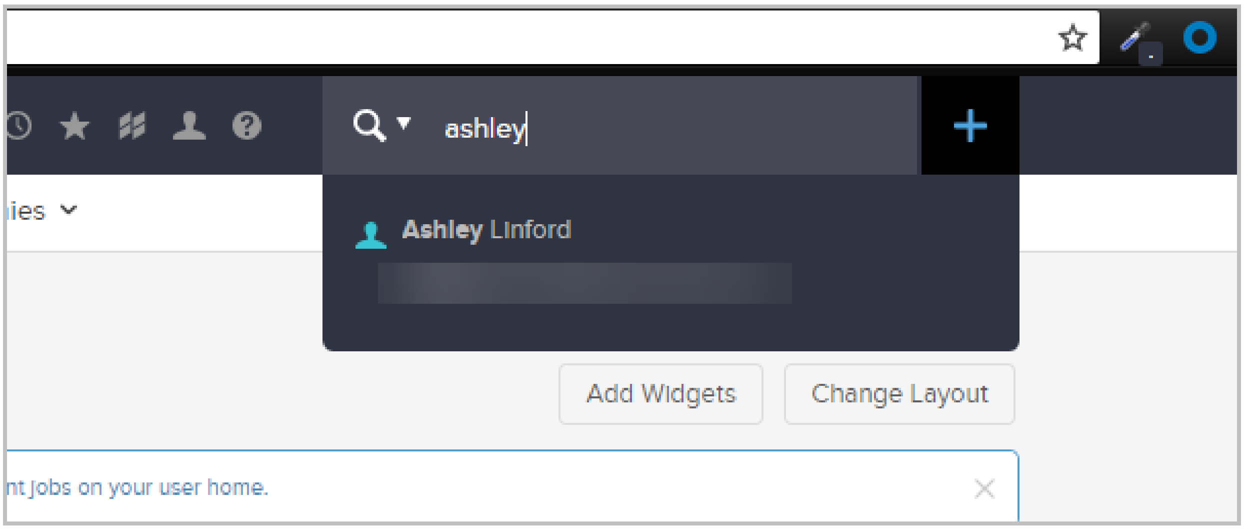
7. You can choose to download any files that were present in the email into theFilebox on their contact record.

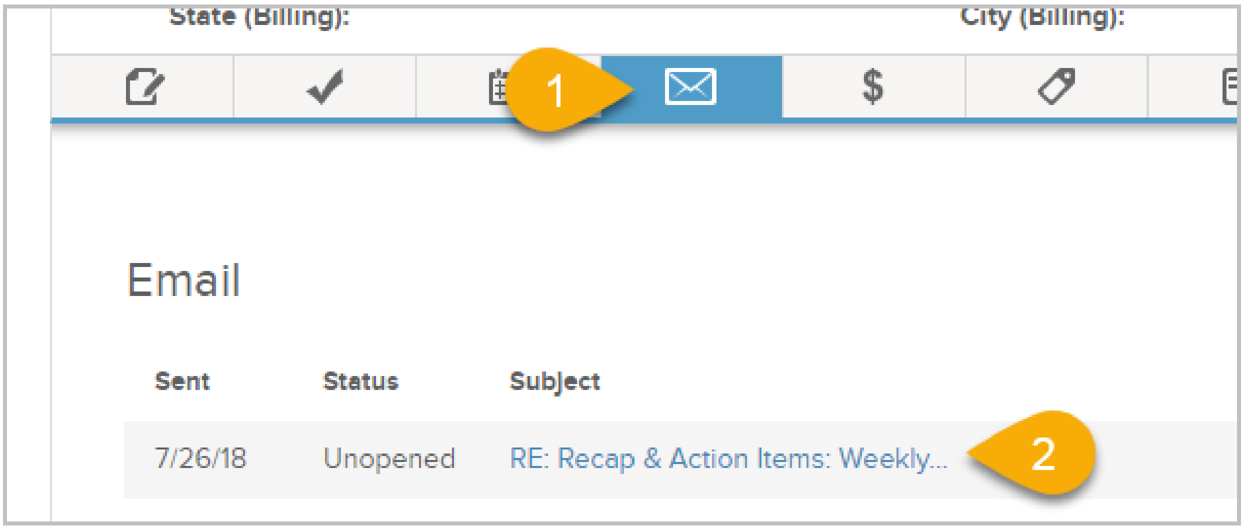


8. Click **OK**



9. The email is now recorded into Infusionsoft. You can now log into Infusionsoft and find the contact and the email that you just recorded.




State (Billing):
City (Billing):
1
Email
Sent
Status
Subject
7/26/18
Unopened
RE: Recap & Action Items: Weekly...
2

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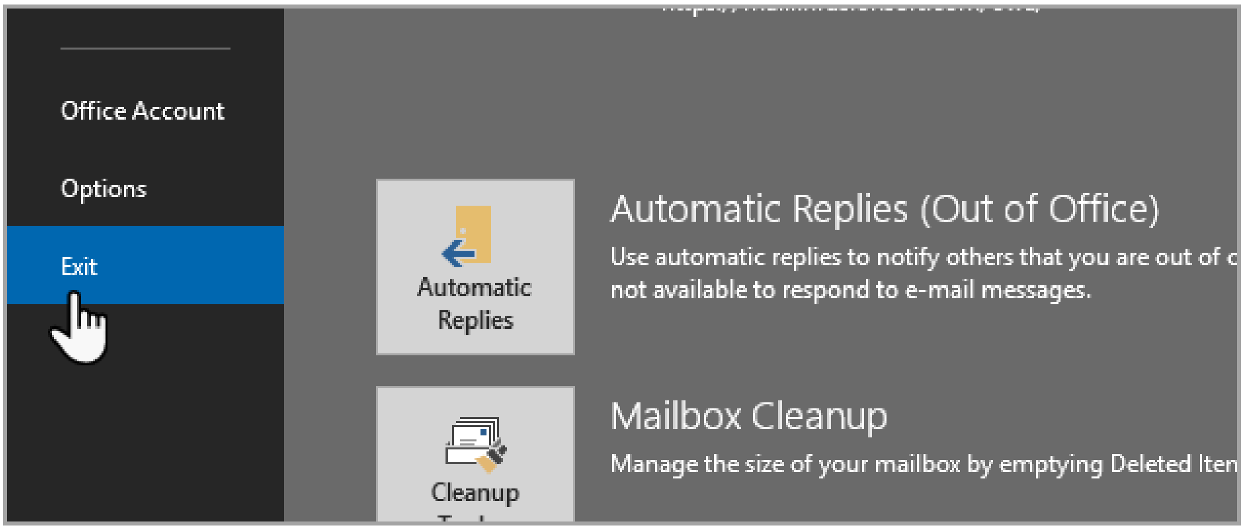
Uninstall Sync for Outlook

Last Modified on 08/31/2018 10:14 am MST

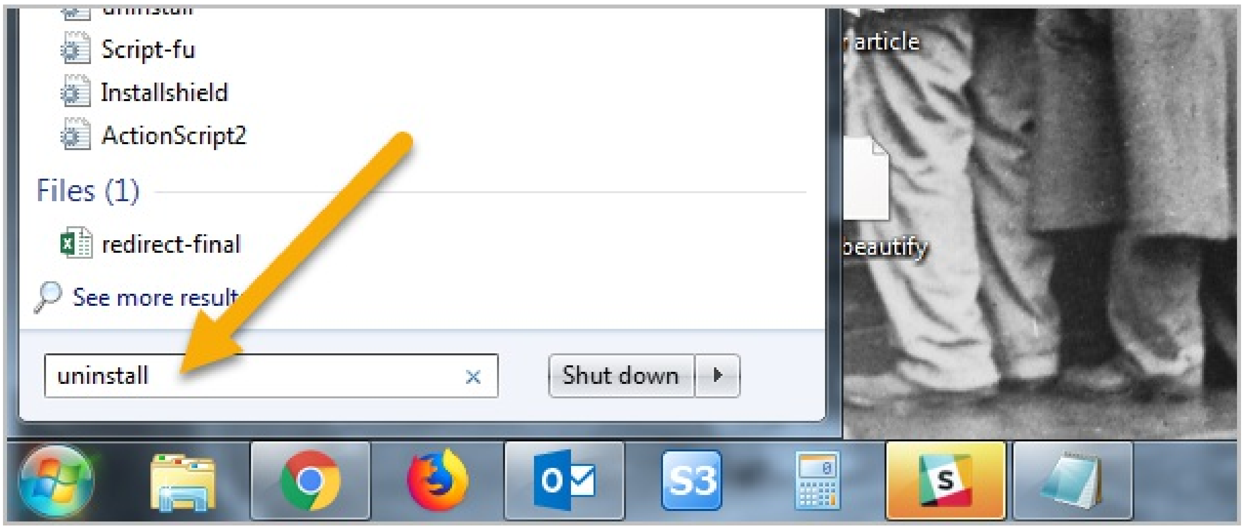
Uninstall Steps

1. Close Outlook

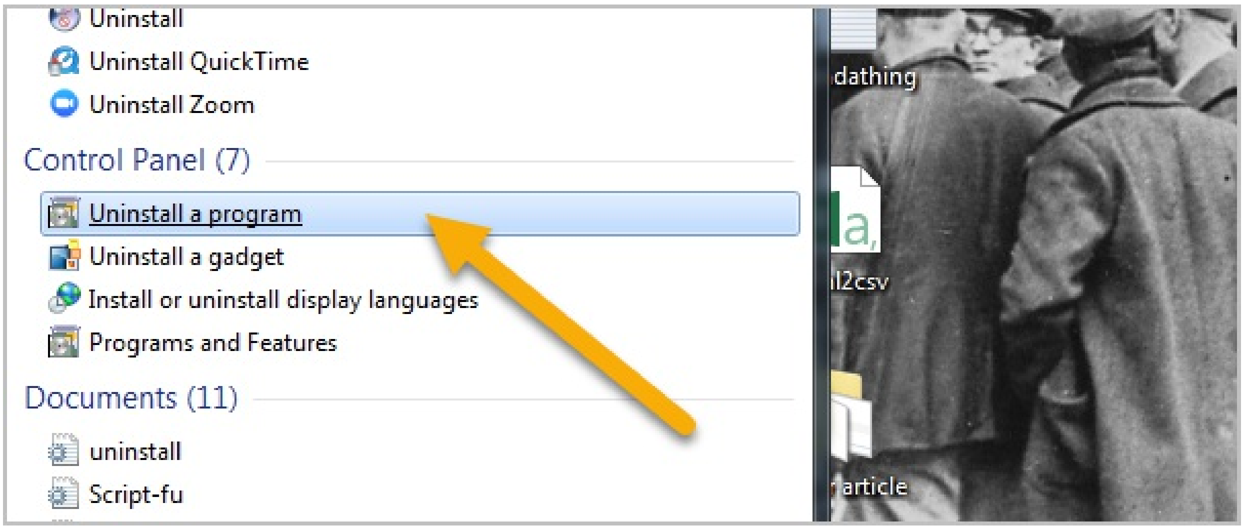


Note! Do **not** open Outlook again until the END of this guide.

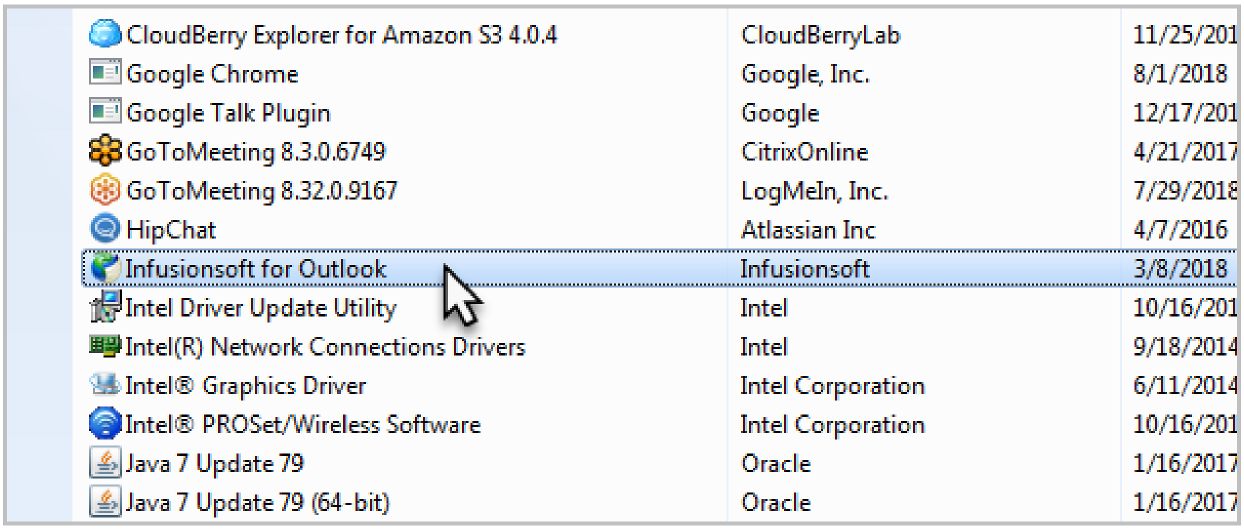
2. Click on the start menu and type **Uninstall**



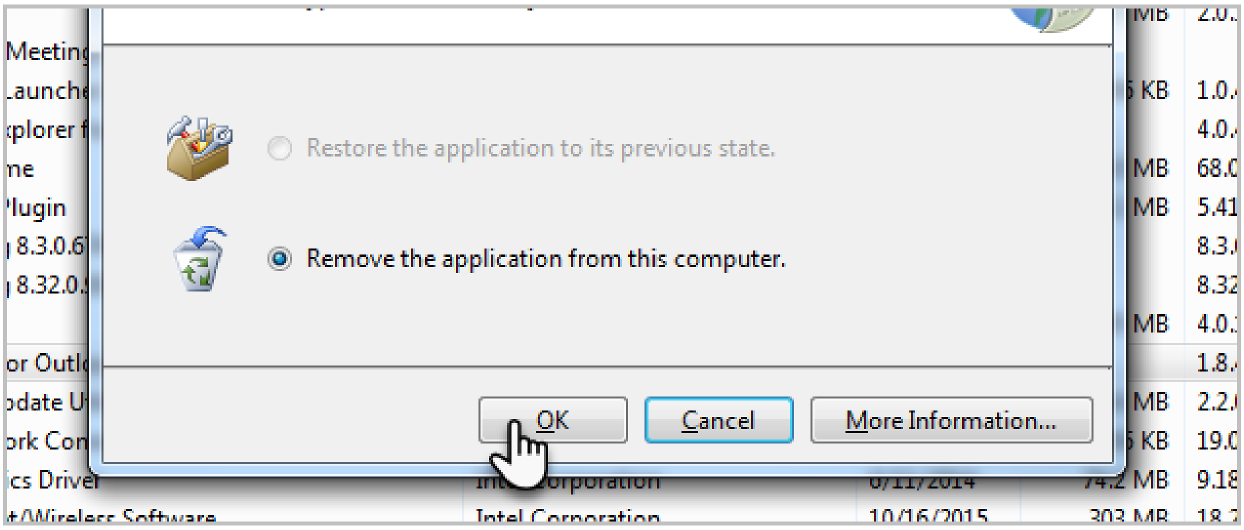
3. Find and click on **Uninstall a program**



4. Double-click on **Infusionsoft for Outlook**

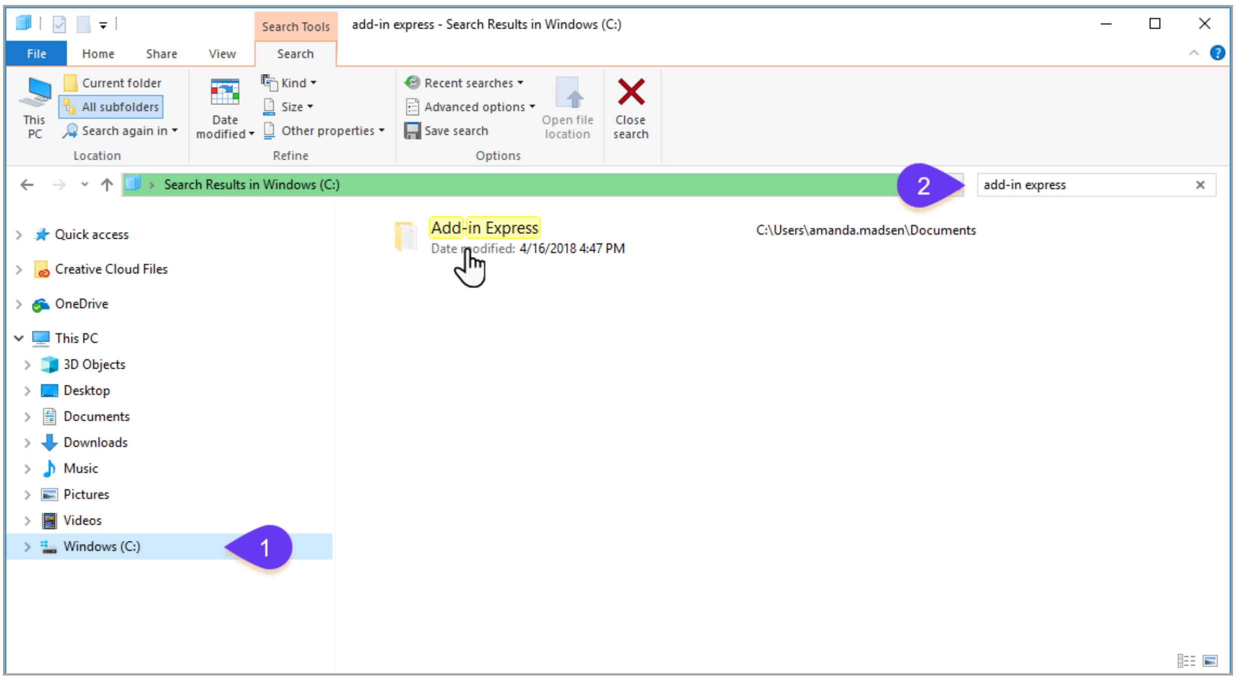


5. When the dialog box pops-up, click **OK** to remove the application from your computer.

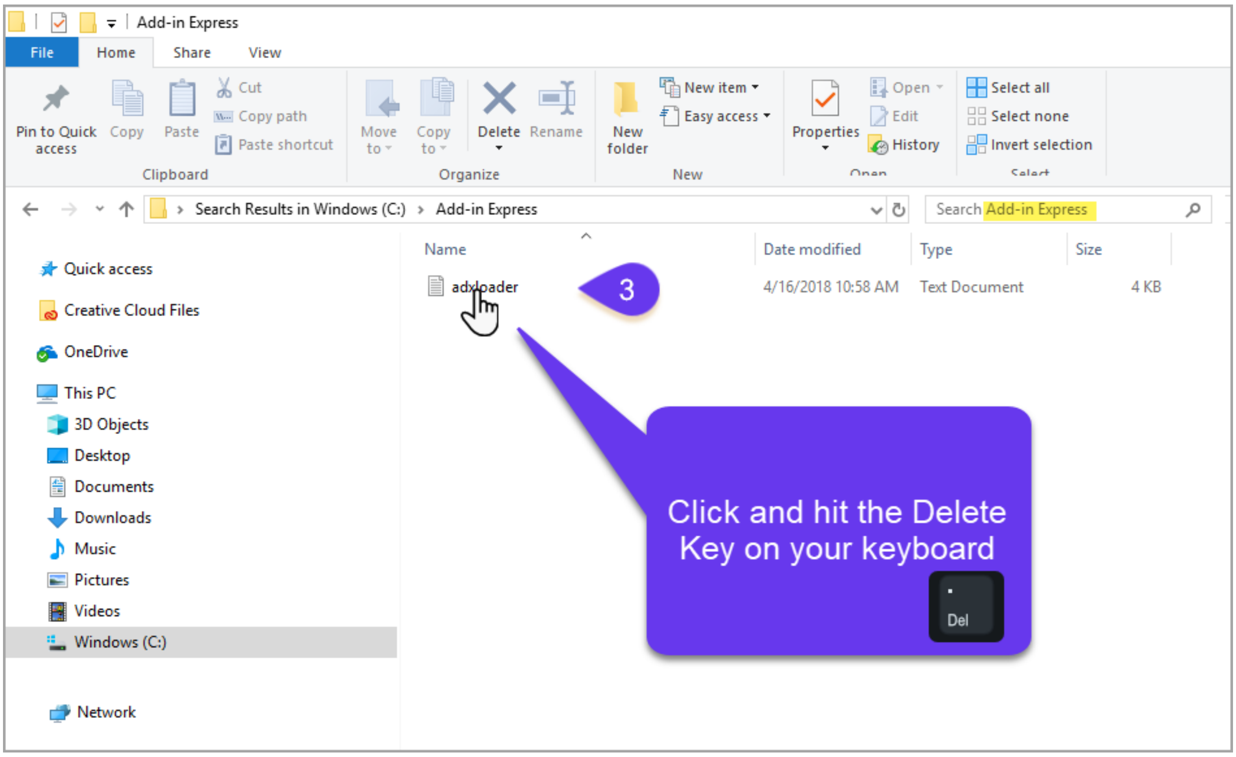


Pro Tip! Click images to view larger

6. Navigate to **Windows (C:)** drive and in the top right search type "**Add-in Express**"
   a. Double click the **Add-in Express** folder

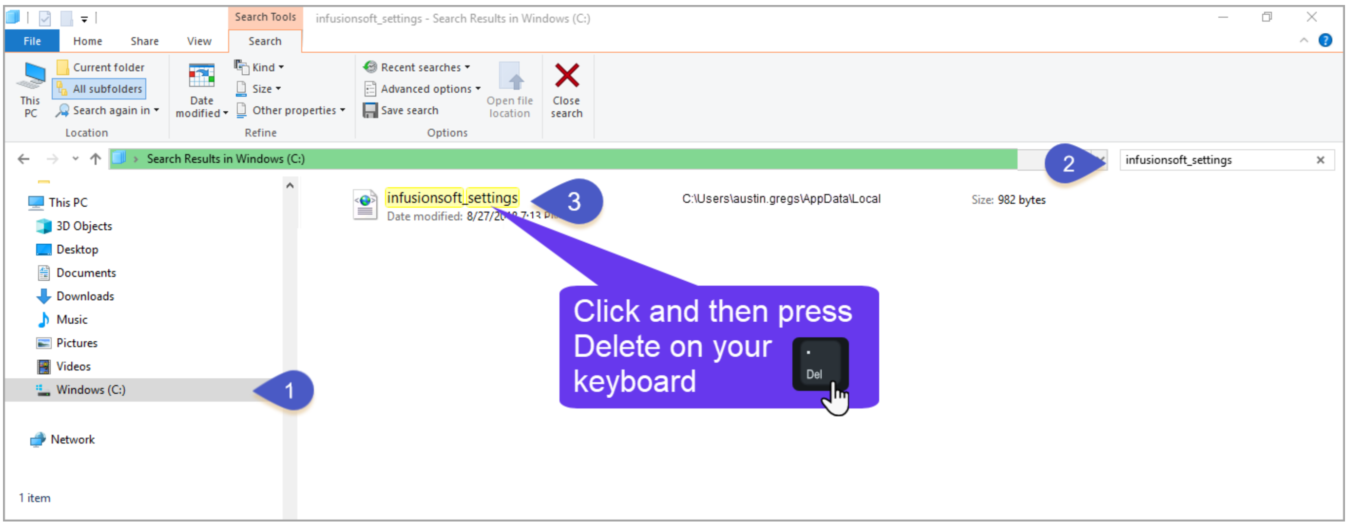


b. Delete **adxloader.txt** file



7. Navigate back to **Windows (C:)** drive and in the top right search type "**infusionsoft_settings**"

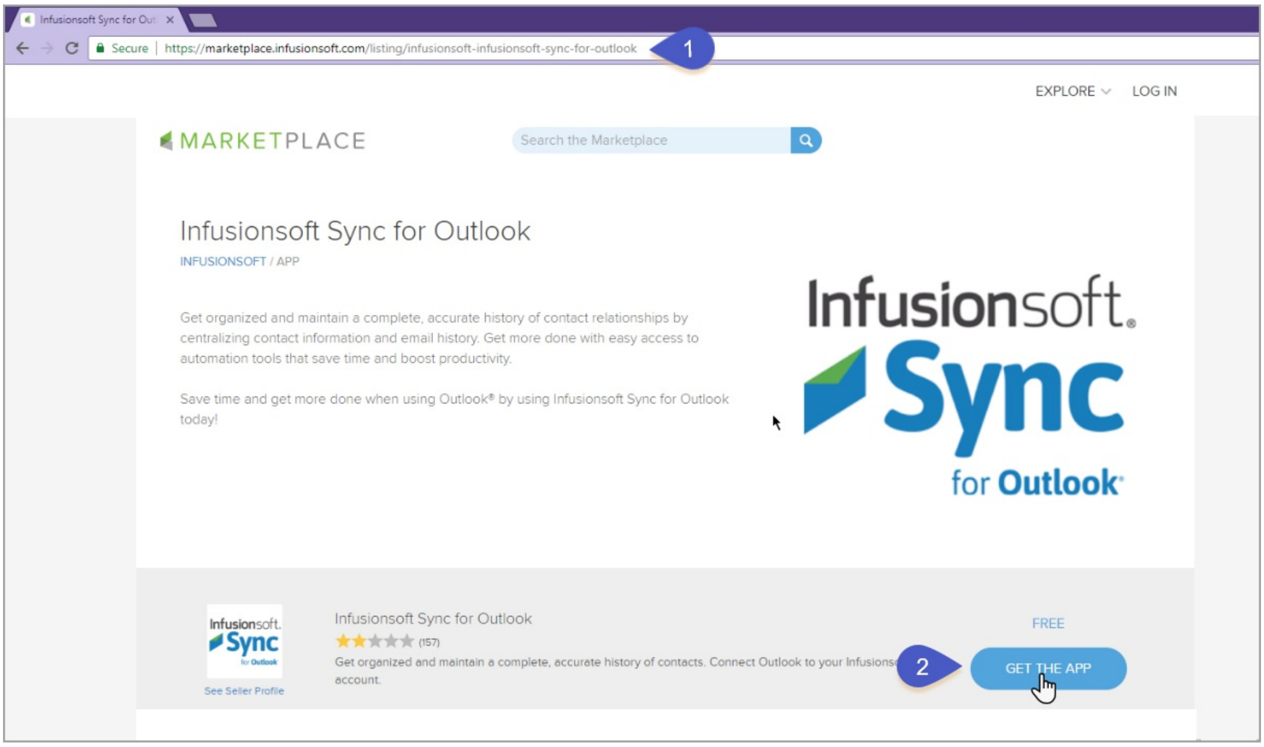
8. Click the "**infusionsoft_settings**" file and Delete



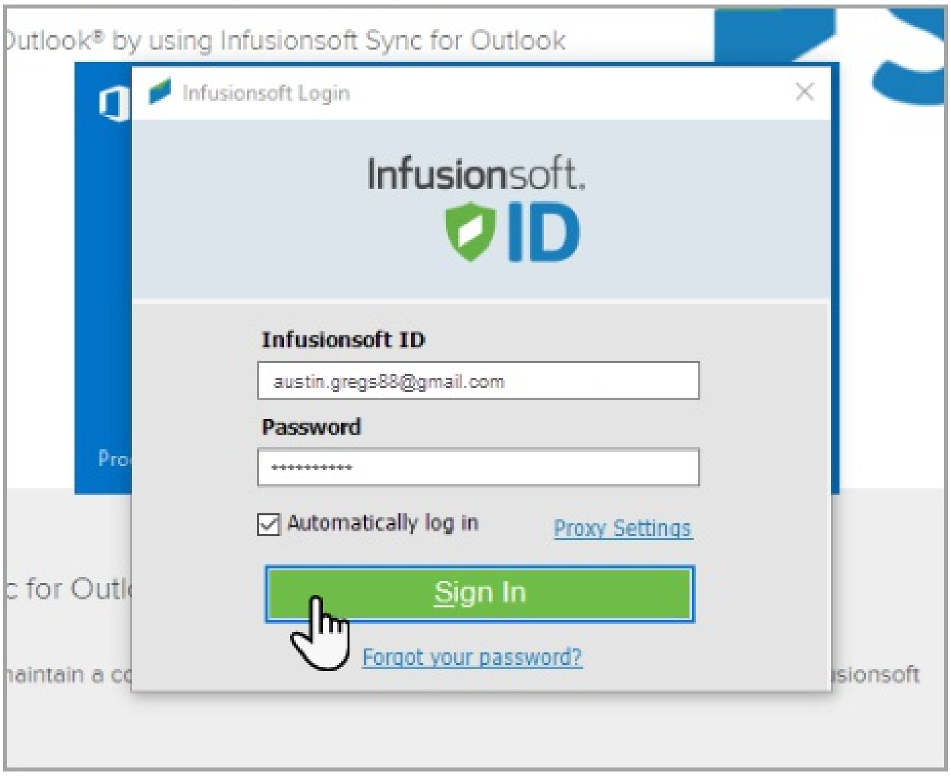
Reinstall Outlook

Outlook Sync is now uninstalled. To reinstall it follow these steps:

1. Click here and then click "Get the app"

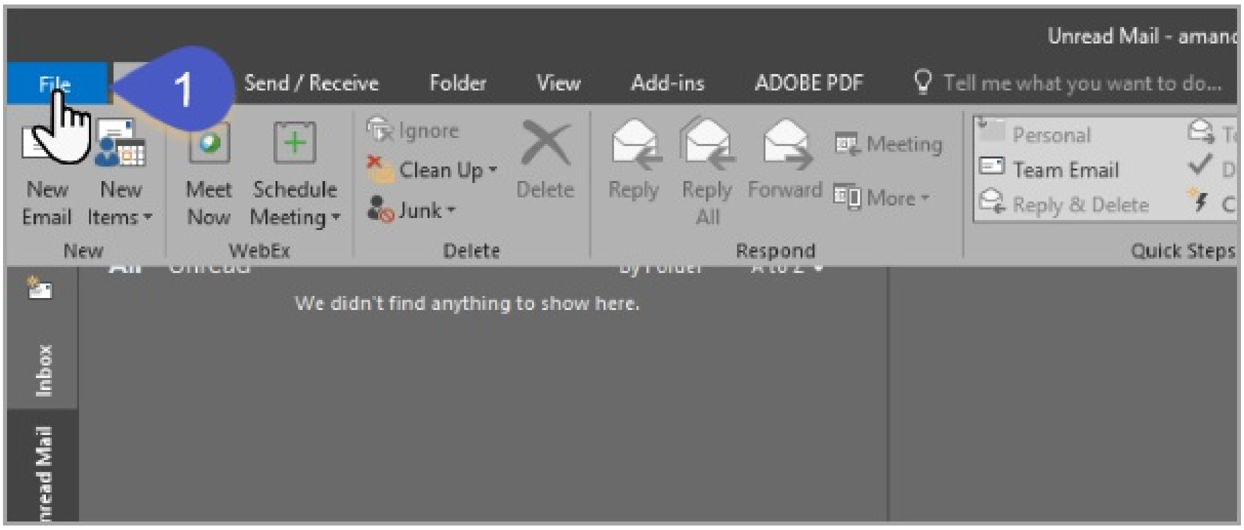


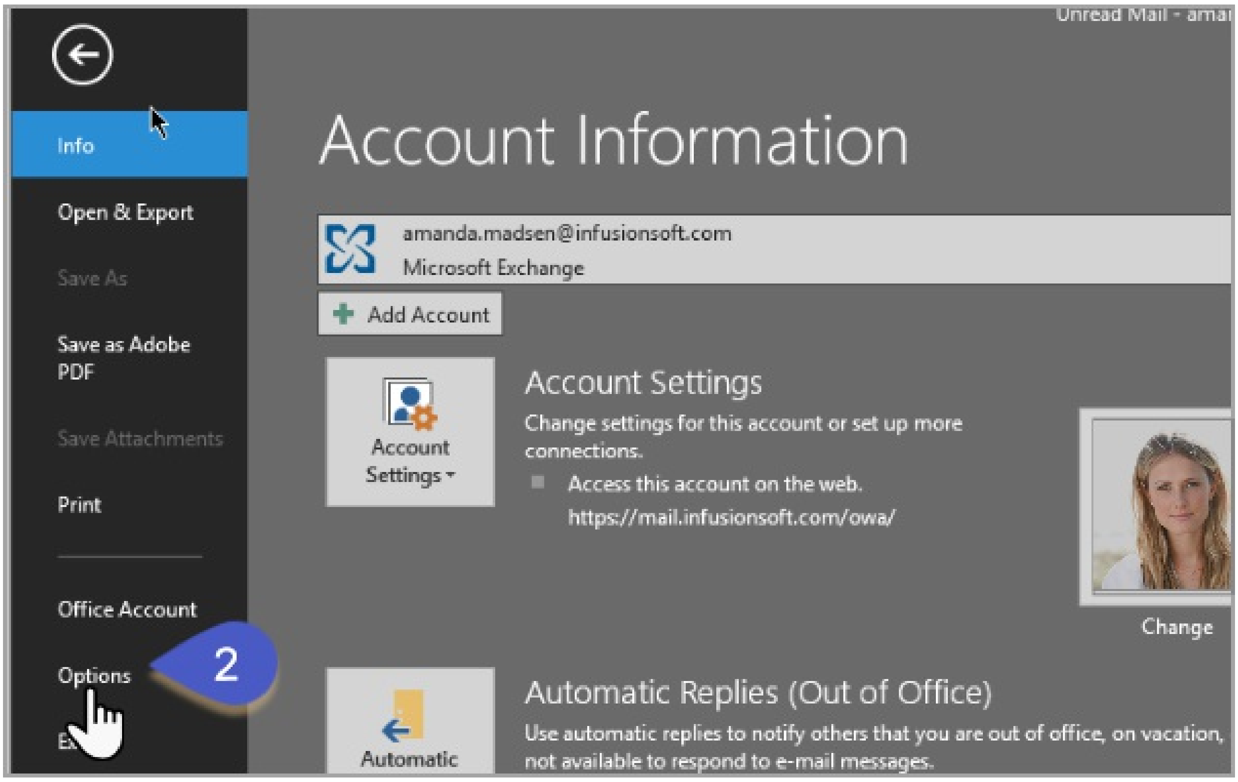
2. Once installed you can open Outlook and login with your Infusionsoft ID.



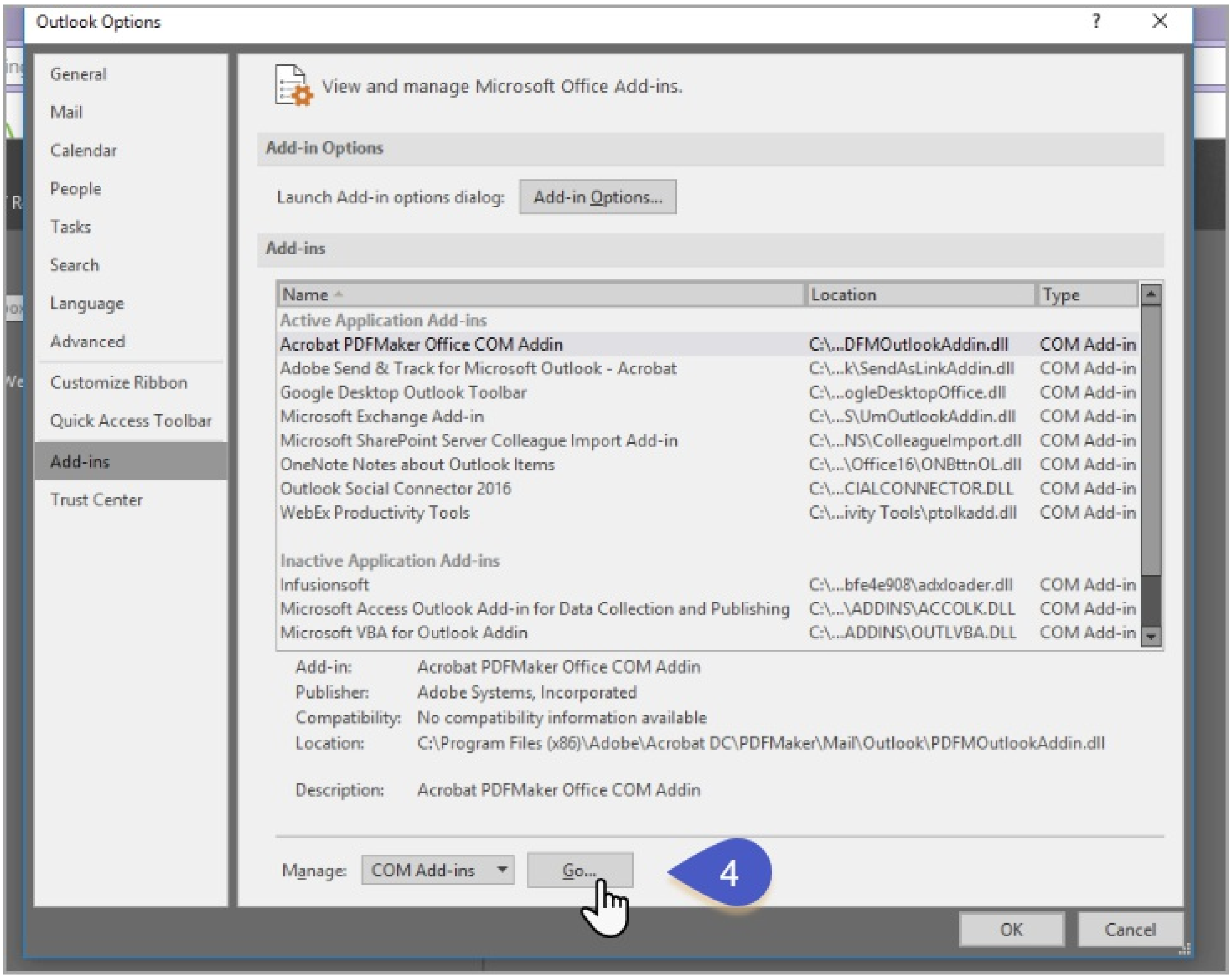
Missing Sidebar

1. Click **File** > **Options**

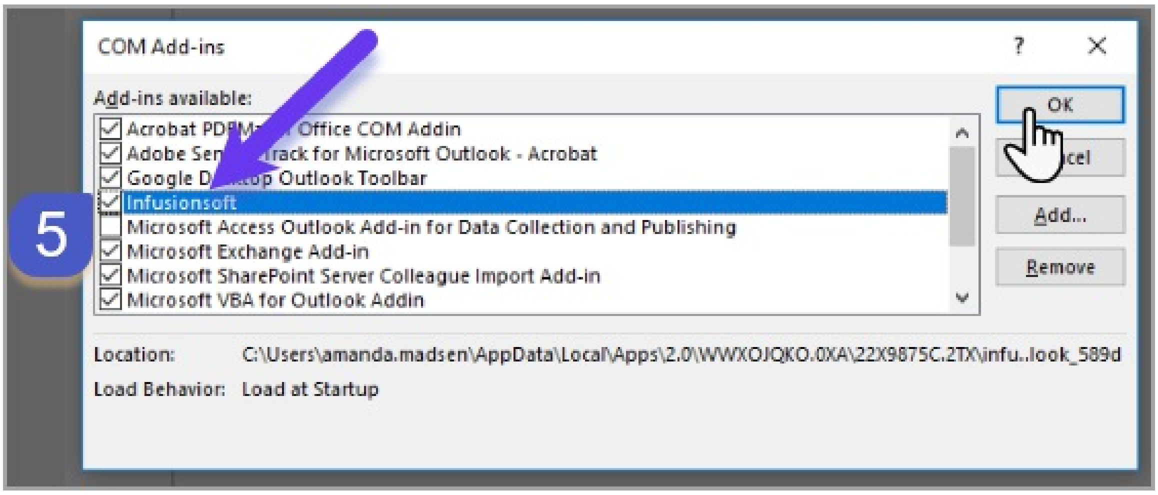




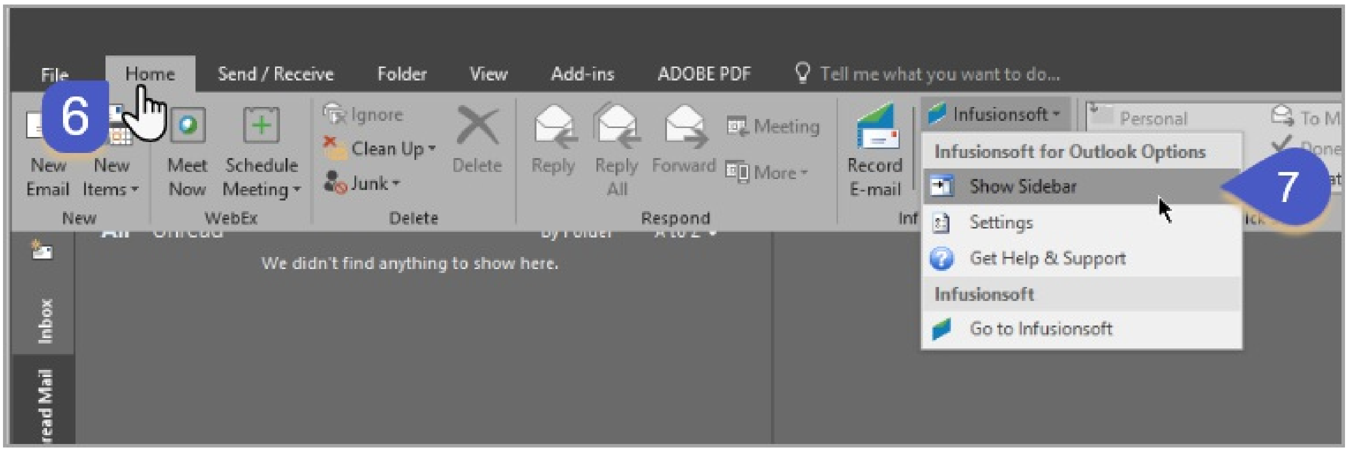
2. Click **Add-ins** > **Go**



3. Check the box next to **Infusionsoft** and click **OK**



4. Go to the **Home** tab and from the **Infusionsoft** drop down select "**Show Sidebar**"


File
Home
Send / Receive
Folder
View
Add-ins
ADOBE PDF
Tell me what you want to do...
New Email
New Items
New
Meet Now
Schedule Meeting
WebEx
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Record E-mail
Infusionsoft
Personal
Infusionsoft for Outlook Options
Show Sidebar
Settings
Get Help & Support
Infusionsoft
Go to Infusionsoft
We didn't find anything to show here.
Inbox
6
7

Using a different version of Infusionsoft? Click Here to learn more

Install Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:12 pm MST

Infusionsoft Sync for Gmail helps you boost productivity and save time by seamlessly integrating your Gmail email account with your Infusionsoft account. By extending the CRM and contact management functionality of Infusionsoft to your email, you can keep all your sales efforts in sync. You can centralize communications and trigger follow-up actions automatically.

Sync for Gmail is only available as a browser extension for Chrome and Firefox.

1. Click here to access the marketplace.
2. Click the **Get the App** button. You will be redirected to the installation page based on your browser.
3. Follow the on-screen instructions to install the plugin.
4. When the installation is finished, sign in in to Gmail. A pop-up window will open. Enter your Infusionsoft ID and password.

Google may prevent Sync from accessing your Gmail account! Follow the steps outlined below if Gmail detects "suspicious activity" on your account

1. Close the light box pop-up
2. Click the Was it you? link in the warning header.
3. Click Yes on the Susupicious activity in your accout message.
4. Click the Yes-Continue button.
5. Click Continue once more.
6. Read the Next step message.
7. You will also receive an email from Google alerting you of the "suspicious sign-in."

Using a different version of Infusionsoft? Click Here to learn more

Manage Tasks And Appointments In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:13 pm MST

1. Select the person you want to add a task or appointment for.
2. Click the **Add a task** link under the Pending tasks & appointments header.
3. Choose **Task** or **Appointment**.
4. Fill out the Task or Appointment details and click the **Save** button.

Using a different version of Infusionsoft? Click Here to learn more

Add A Note To A Contact In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:13 pm MST

1. Click the **Add note** link under the **Notes & Completed Tasks** header

2. Add the note details and click the **Save** button

Using a different version of Infusionsoft? Click Here to learn more

Add An Opportunity With Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:13 pm MST

1. Click the **Add Opportunity** under the Opportunities header.

2. Fill out the opportunity information.
   - **Opportunity Title** - This is simply the name you give to this particular deal. If it's for a specific product or service, you may want to put the name of the product/service in the title
   - **Currently Assigned to** - This field will default to you; however, you can reassign this deal if you have the appropriate permissions in Infusionsoft.
   - **Sales Stage And Steps** - Use this drop-down to set the sales stage. If you have set up sales stage triggers in Infusionsoft, this will start automation.
   - **Opportunity Notes** - This stores notes concerning this opportunity.
   - **Next Action Date** - This is the next date an action is required for this opportunity. This will appear on your Infusionsoft calendar as an appointment. For example, if you called the contact and had to leave a voice mail, you would want to schedule an appointment to remind you to call again at a later date or time.
   - **Next Action Notes** - These are the notes that will appear on your appointment.
   - **When will this deal close?** - This allows the sales rep to forecast their potential sale so that the sales manager can better forecast sales for a given time period.
   - **Projected Revenue High:** - This figure can be entered by the sales rep to remind them of the dollar value of this opportunity (this does not affect forecasting reports)
   - **Projected Revenue Low:** - This figure can be entered by the sales rep to remind them of the dollar value of this opportunity (this does not affect forecasting reports)

3. Click **Save**

Using a different version of Infusionsoft? Click Here to learn more

Add Contacts To A Sequence In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:14 pm MST

Legacy Warning: Follow-up Sequences have been replaced with the automation available in the Campaign Builder. However, for those that are more familiar with follow-up sequences, you can still use them here.

1. Click the **Add a sequence** link under the **Follow-up Sequences** header
2. Select the **Follow-up Sequence** and click the **Start Sequence** button.

Using a different version of Infusionsoft? Click Here to learn more

Add A Tag In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:14 pm MST

1. Click the **Add Tag** link under the **Tags** header.
2. Choose the Tag category and check the Tag(s) you would like to apply or create a new tag on-the-fly.
3. Click **Apply this Tag**

Using a different version of Infusionsoft? Click Here to learn more

Synchronize Gmail Emails And Appointments With Infusionsoft

Last Modified on 08/02/2018 4:15 pm MST

Infusionsoft Sync for Gmail allows you to sync sent or received emails with contact records in Infusionsoft. You need to enable the email sync feature from the **My Settings** area. Once the email sync feature is enabled, all emails will be saved inside of Infusionsoft. The email sync setting gives you the ability to specify email addresses and domains to sync. The calendar sync feature allows you to create events from Infusionsoft appointments and opportunity actions. Calendar syncs appointments, notes, pending tasks, and/or completed tasks 2 months out in the future by default. You can choose to sync up to 6 months in advance if you wish.You can also share your Google calendars with other team members. You can automatically save a copy of all sent or received emails to a specific contact record in Infusionsoft.

1. Click on the **gear icon** in the Sync for Gmail pane (not the gear icon to the left of the panel) and select **My Settings**.

2. Enable **Email and Calendar sync**.

Using a different version of Infusionsoft? Click Here to learn more

Add Contacts In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:15 pm MST

1. Click on an email to pull up the associated Infusionsoft contact record in the sidebar. The information displayed includes name, email address, phone number and address. Searching for specific contacts is also available in the sidebar.

2. If the contact doesn't have a record in Infusionsoft, you can roll over a contact name to populate the new contact fields in Sync for Gmail. Once the new contact fields are populated, you can save the contact to Infusionsoft.

3. Hover your mouse over an email in your Gmail inbox. This causes the contact information to populate in the pane to the right.

4. Now, just click the **Add Contact** button to add this contact to your Infusionsoft account.

Using a different version of Infusionsoft? Click Here to learn more

Trouble Signing In To Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:15 pm MST

1. Be sure you are using your Infusionsoft ID to sign into Infusionsoft Sync for Gmail.

2. If you have forgotten your password, or it has expired, you must reset your password using the Forgot your password? tool on the sign in page.

3. Check that cookies are enabled in the browser. It’s necessary to check and enable them, or disable and enable if they are already enabled.

Manage Preferences In Infusionsoft Sync For Gmail

Last Modified on 08/02/2018 4:16 pm MST

You can use the buttons at the top to hide the panel, pause the automatic loading of contacts, and refresh the sidebar.

1. Click the **gear** icon and choose **My Settings**.
2. Choose which sections you would like to hide or show.

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft Sidebar

Last Modified on 08/02/2018 4:16 pm MST

The power of Infusionsoft, right where you already work. Access your Infusionsoft CRM records, add contacts to marketing campaigns, create or complete tasks and automate back office workflows right from the comfort of your email inbox.

Please Note! Infusionsoft Sidebar is an alternative to the Infusionsoft Sync for Gmail app. It does not currently support Email and Calendar syncing. If you currently need these features, please use Infusionsoft Sync for Gmail for the time being. We will notify customers when Calendar and Email syncing is available in the new Infusionsoft Sidebar, as this is planned for a future iteration.

Contacts

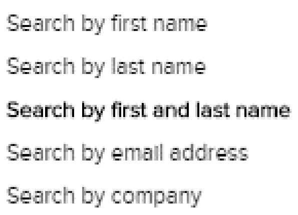
Load a contact into the sidebar

1. Hover over the email address in the email or the preview of the email

Search for a contact

1. Use the search bar at the top of the sidebar to search for a contact

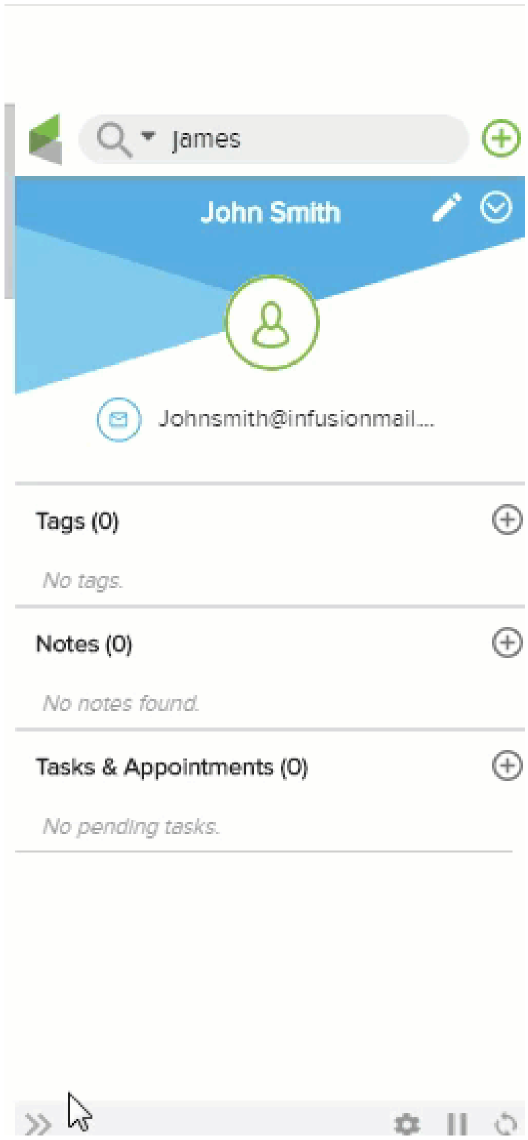
2. Click the dropdown arrow to choose a search option (the search option in bold indicates which search option is currently selected)



Add a contact

There are two options for adding contacts via the Infusionsoft Sidebar for Email: Manually, or by hovering over an email in the inbox.

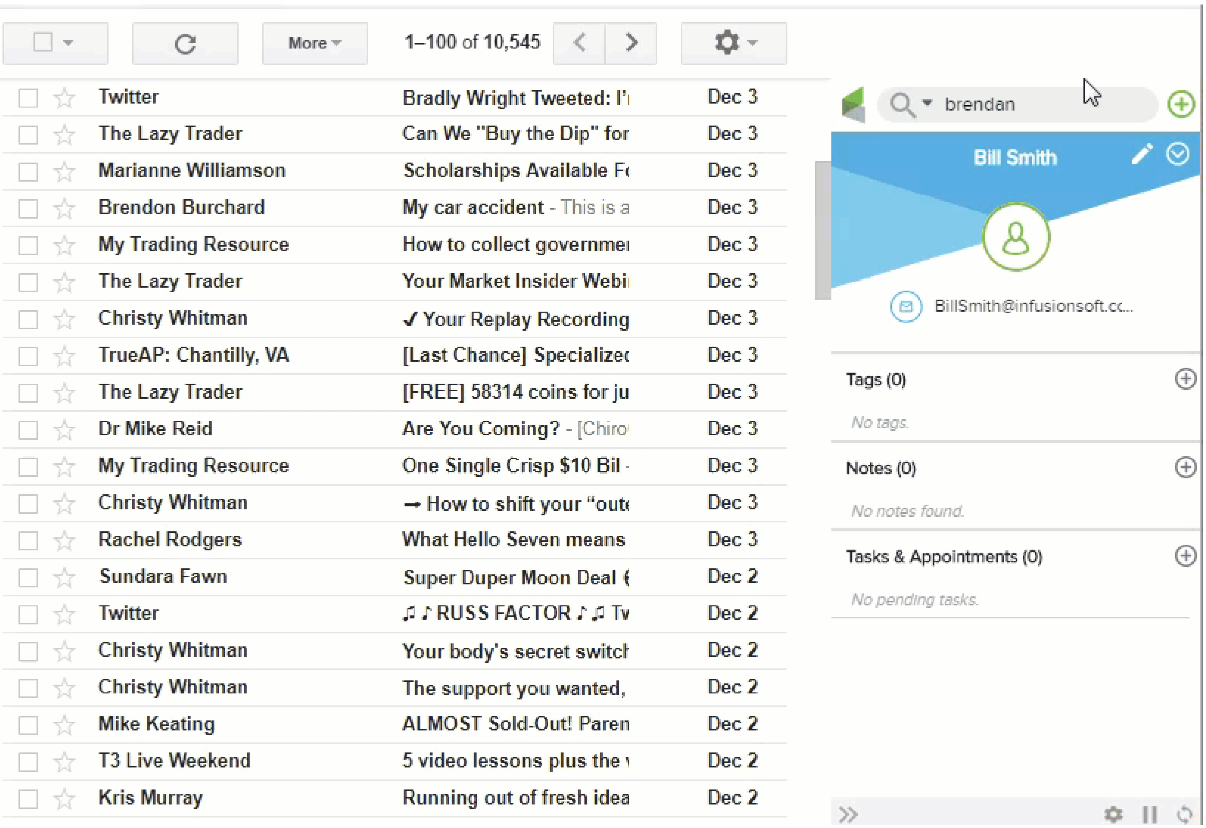
Manually adding a contact



1. click the '+' icon at the top of the sidebar to add a new contact
2. Fill out the 'Add Contact' form in the sidebar with any available information

3. Press the 'Add Contact' button at the bottom of the form in the sidebar.

Adding a contact by hoving over an email in the inbox

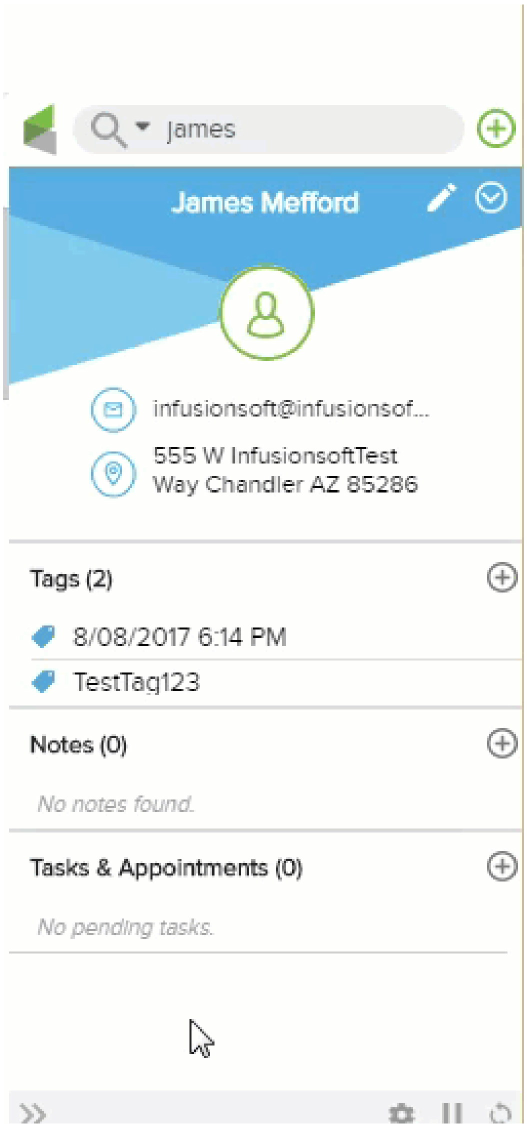


1. Hover over an email in the inbox. If the contact **already** exists as an Infusionsoft contact, their contact card will automatically load in the sidebar.

2. If the contact does **not** currently exist in your Infusionsoft contact list, the 'Add Contact' form will automatically appear, pre-populated with details from the email in the inbox

3. Review and add any additional information, and press the 'Add Contact' button at the bottom of the form, in the sidebar.

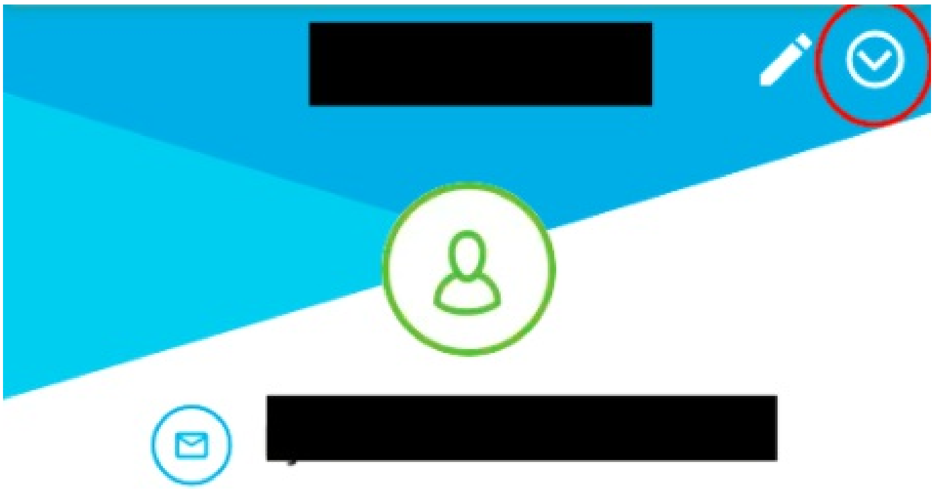
Edit a contact



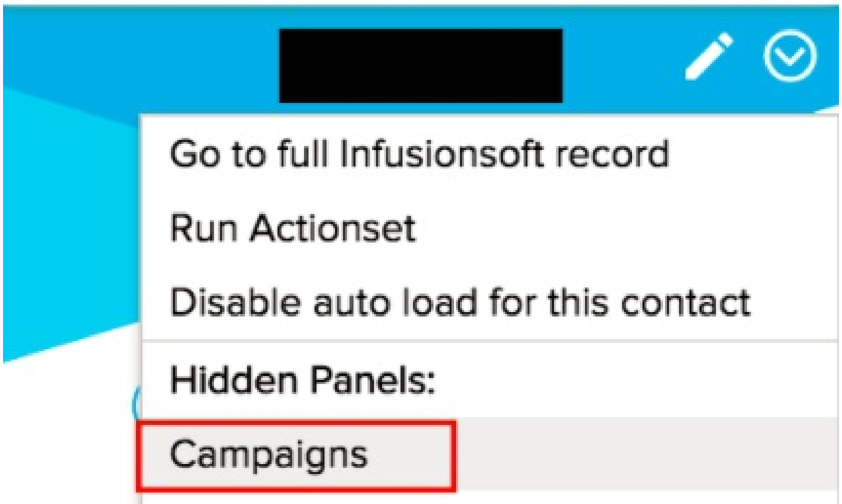
1. Load a contact card into the sidebar
2. Click the 'Edit' icon (pencil) at the top right of the sidebar
3. Make any needed changes to the 'Edit Contact' form
4. Press the 'Update Contact' button at the bottom of the form, in the sidebar.

View Campaign History and Status

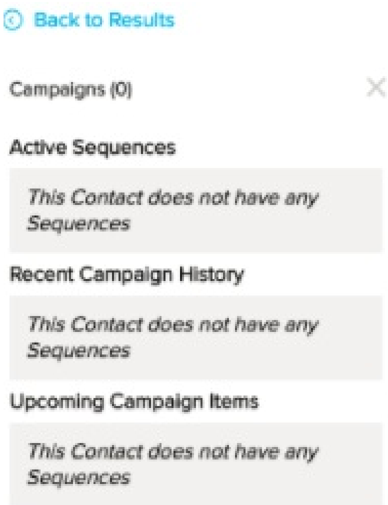
1. When a contact is displayed in the sidebar, Click the drop down arrow, located in the top right corner of the sidebar



2. In the menu, select the 'Campaigns' menu item



3. View your contact's campaign history

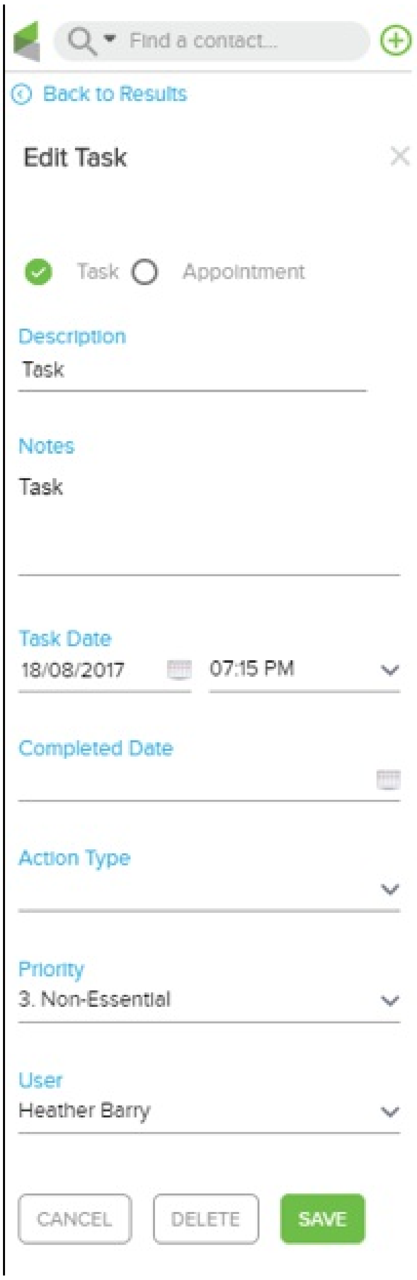


Tasks

Add a task

1. Click the '+' icon next to the Tasks & Appointments

2. Add task information



3. Click the Save button

Edit a task

1. Click on the task
2. Change any information needed
3. Click the 'Save' button

Delete a task

1. Click on the task
2. Click the 'Delete' button

Appointments

Add an appointment

1. Click the '+' icon next to Tasks & Appointments
2. Add appointment information
3. Click the 'Save' button

Edit an appointment

1. Click on the appointment
2. Change any information needed
3. Click the 'Save' button

Delete an appointment

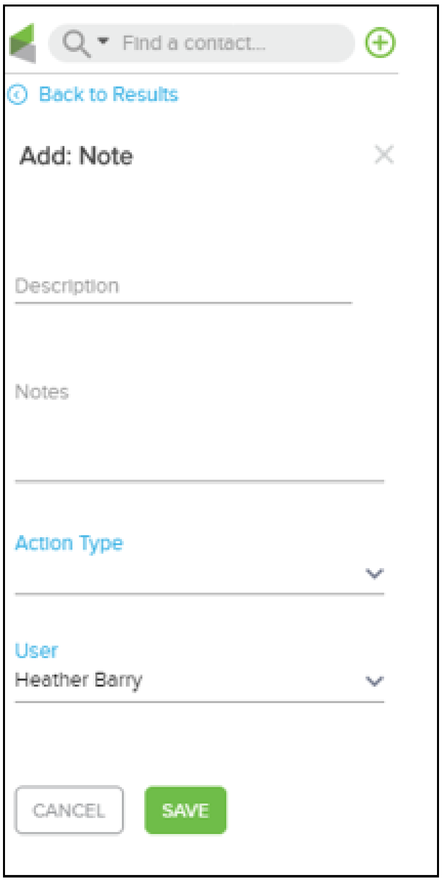
1. Click on the appointment
2. Click the 'Delete' button

Notes

Add a note

1. Click the '+' icon next to Notes

2. Add note information



3. Click the 'Save' button

Edit a note

1. Click on the note

2. Change any information needed

3. Click the 'Save' button

Delete a note

1. Click on the note
2. Click the 'Delete' button

Tags

Apply or Create/Apply a tag

1. Click the 'Add Tag' link under the 'Tags' header
2. Choose a tag category
3. Check the tags that need to be applied, or, create a new tag on-the-fly

Opportunities

Add an Opportunity

1. Click the '+' icon next to Opportunities
2. Add the opportunity information
3. Click the 'Save' button

Edit an Opportunity

1. Click the opportunity
2. Change any information needed
3. Click the 'Save' button

Delete an Opportunity

1. Click on the opportunity

2. Click the 'Delete' button

Filebox

Add a file

1. Click the '+' icon next to filebox

2. Click the '+Add Files' button

Additional Settings and Features

Go to the full Infusionsoft record

1. Click the menu icon at the top of the sidebar

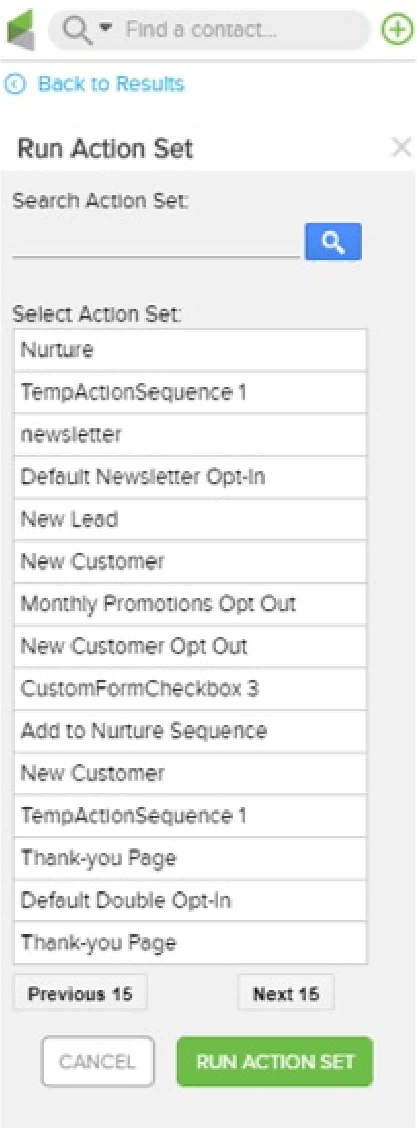
2. Click 'Go to full Infusionsoft record'

Run Actionset

1. Click the menu icon at the top of the sidebar

2. Click 'Run Actionset'

3. Select an action set from the list (There is also a search function, above the list)



4. Click 'Run Action Set' to apply the selected action set

Disable auto load for this contact

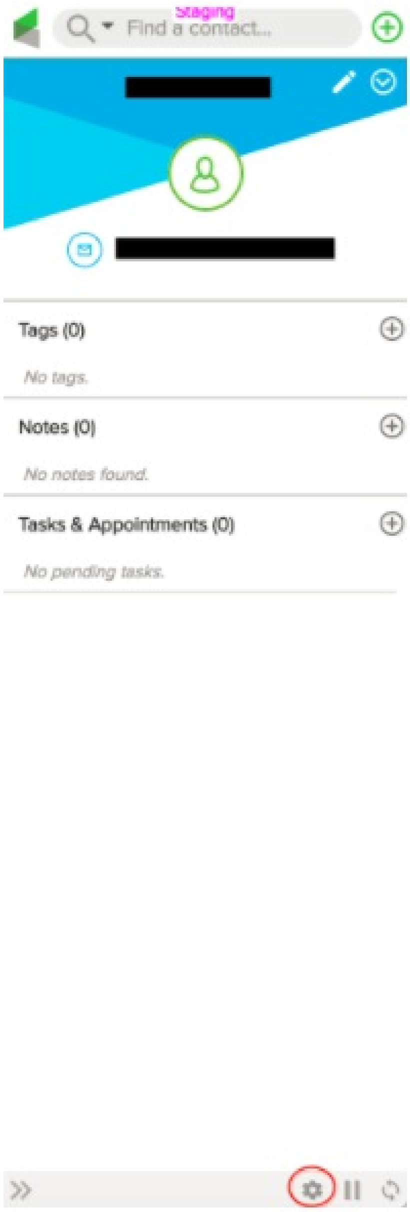
1. Click the menu icon at the top of the sidebar
2. Click 'Disable auto load for this contact'

Enable auto load for this contact

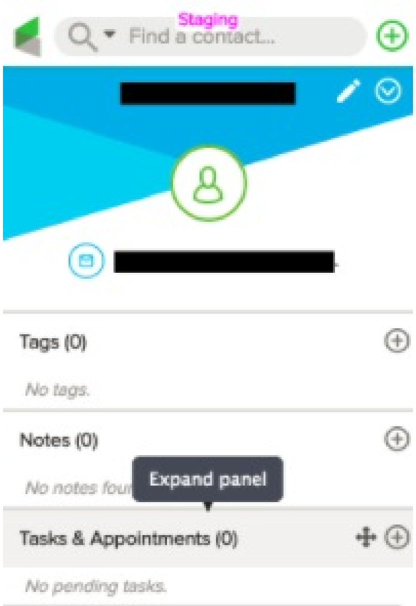
1. Click the menu icon at the top of the sidebar
2. Click 'Enable auto load for this contact'

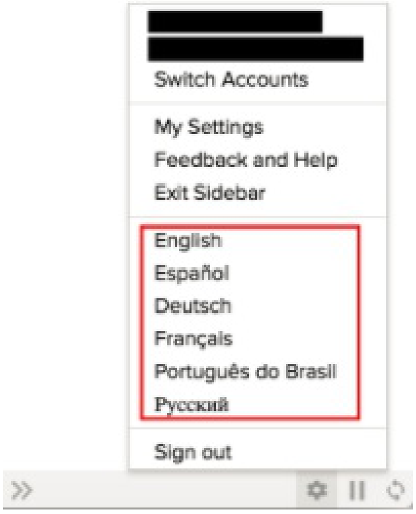
Change the sidebar language

1. Click the settings icon at the bottom of the sidebar



2. Select one of the 6 supported languages (English, Spanish, German, French, Portuguese, or Russian)



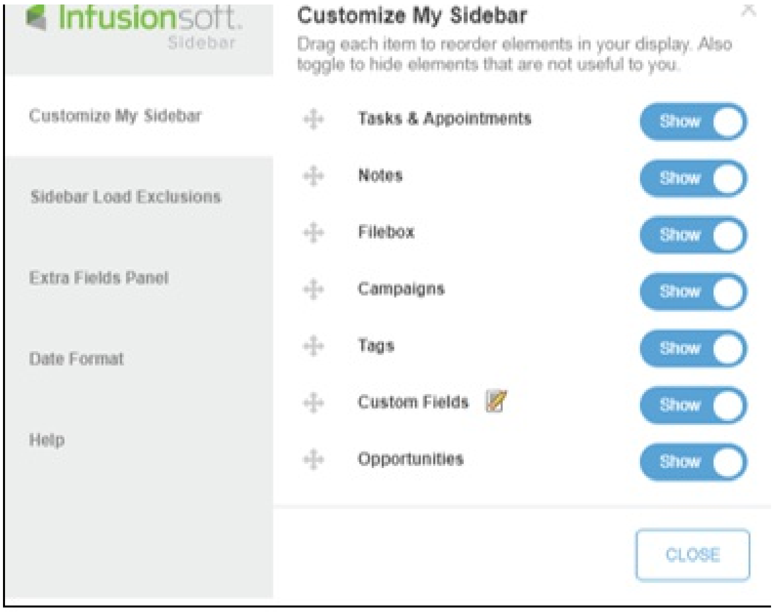


Sidebar Settings

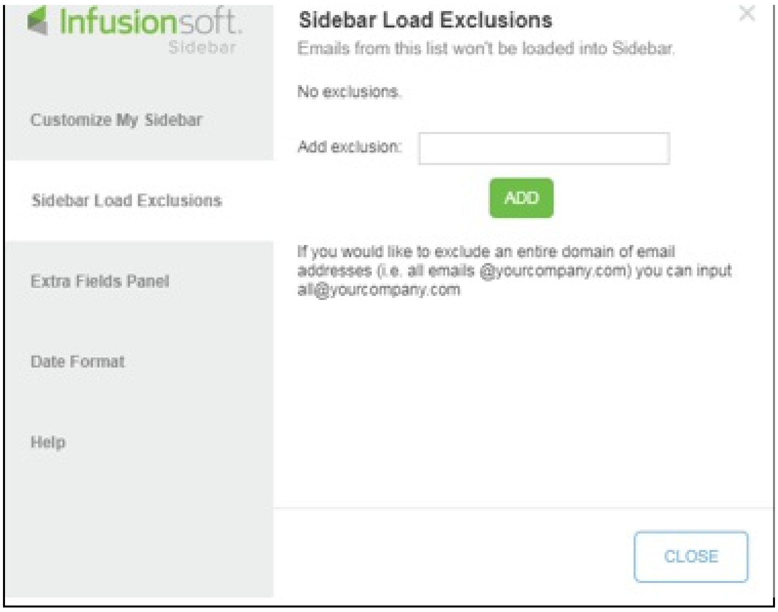
1. Click the settings icon at the bottom of the sidebar

2. click on 'My Settings.

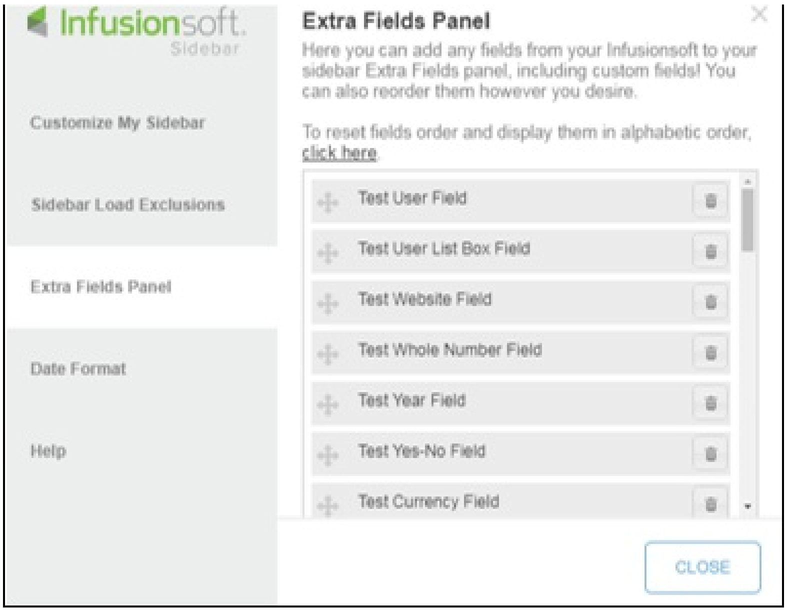
Customize My Sidebar Tab



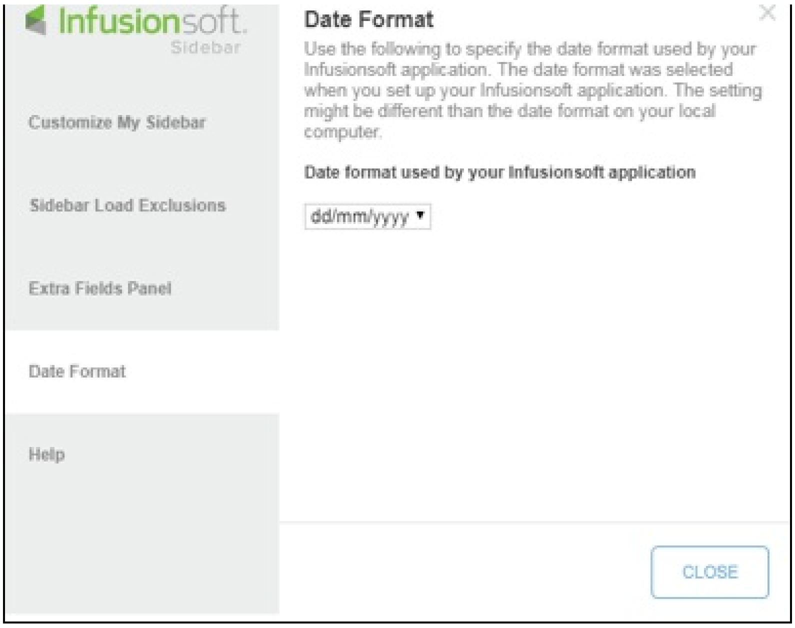
Sidebar Load Exclusions Tab



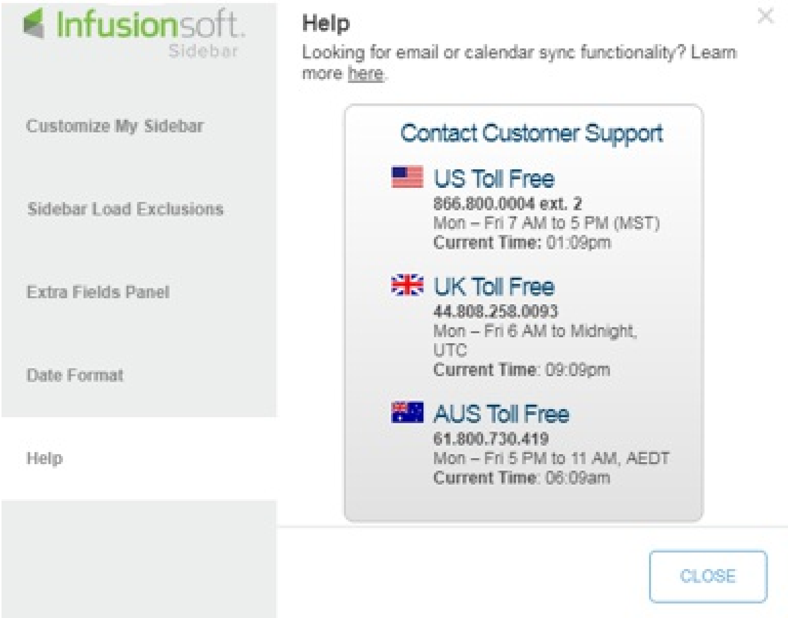
Extra Fields Panel Tab



Date Format Tab



Help Tab



Sidebar Functions

Refresh Sidebar

1. Click the refresh icon at the bottom of the sidebar

Pause Sidebar

1. Click the grey pause icon at the bottom of the sidebar, to pause functionality (The pause button will turn red when Infusionsoft Sidebar is paused)

Resume Sidebar

1. Click the red pause icon at the bottom of the sidebar, to resume functionality (The pause button will turn grey when the Infusionsoft Sidebar is active.)

Collapse Sidebar

1. Click the '>>' icon at the bottom of the sidebar, to collapse the sidebar

Expand Sidebar

1. Click the '<<' icon at the bottom of the sidebar to expand the sidebar

Exit Sidebar

1. Click the settings icon at the bottom of the sidebar
2. click 'Exit Sidebar'

Sign Out

1. Click the settings icon at the bottom of the sidebar
2. Click 'Sign Out'

Other Helpful Tips

- If the sidebar does not automatically appear, after logging into your email, refresh your browser window and the sidebar should appear
- If you hover over tasks/appointments/notes/opportunities, a tool tip with some additional info, such as the start and end date for appointments, the task date for tasks, the creation date of notes, and next action dates for opportunities, will appear.

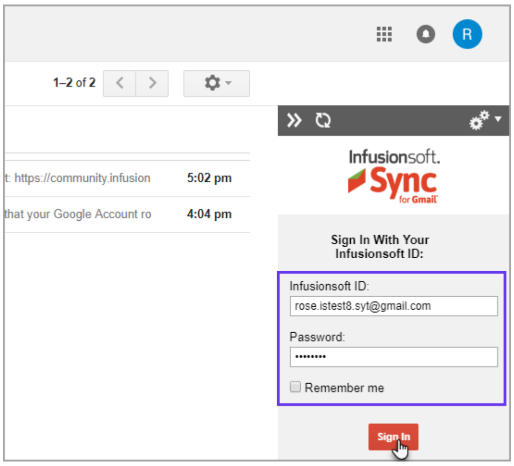
Using a different version of Infusionsoft? Click Here to learn more

Enable Email Gmail Sync

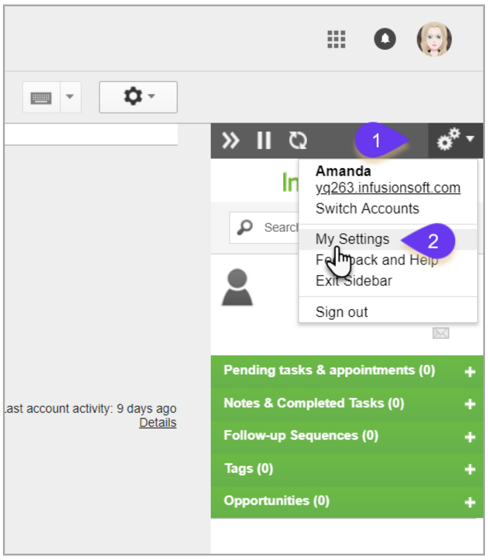
Last Modified on 08/09/2018 1:44 pm MST

Pro Tip! Click images to view larger

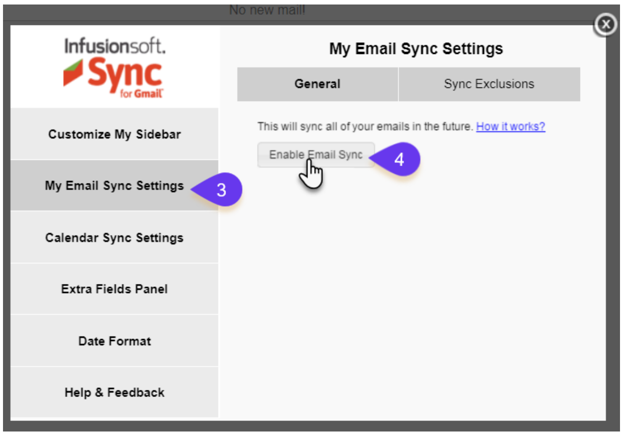
1. Log into Gmail Sync Sidebar



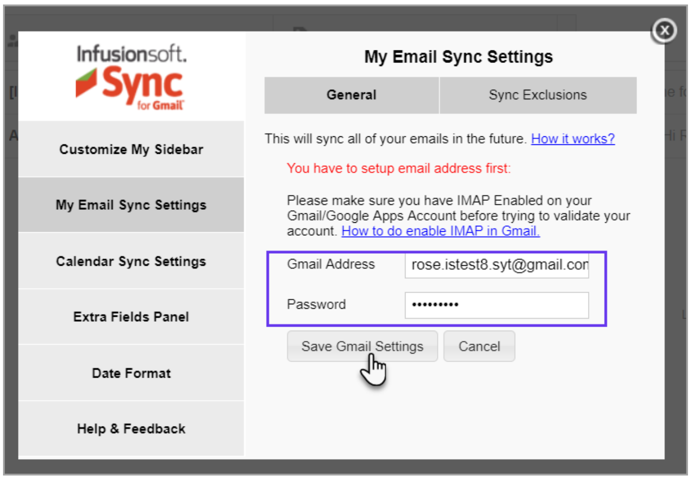
2. Go to the Gmail Sync gear icon and click "My Settings".



3. Click Enable Email Sync.



4. Type in the **Gmail** email address and **Gmail** password and click Save Gmail Settings then click "**Save Gmail Settings**"

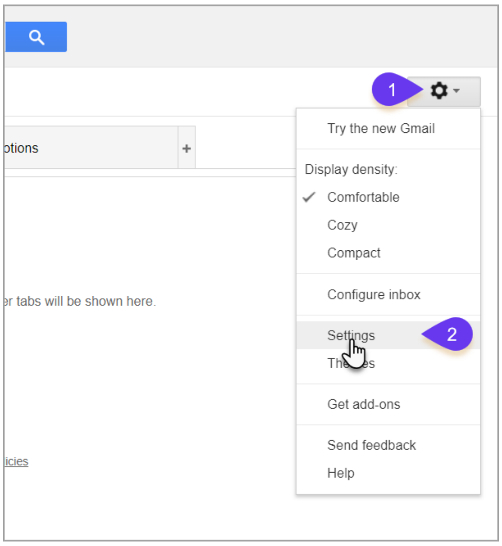


5. You are set up. Emails can take up to 2 hours to sync but usually only take 30 minutes.
    - This will only sync emails going forward not ones from the past.
    - There isn't a way to manually sync an email using Gmail sync
    - This will sync emails to and from contacts inside of Infusionsoft only. If the contact isn't in the system then it won't sync the email.

6. Please see the "Error: Invalid Gmail Login or password" section if you receive the error after attempted login.

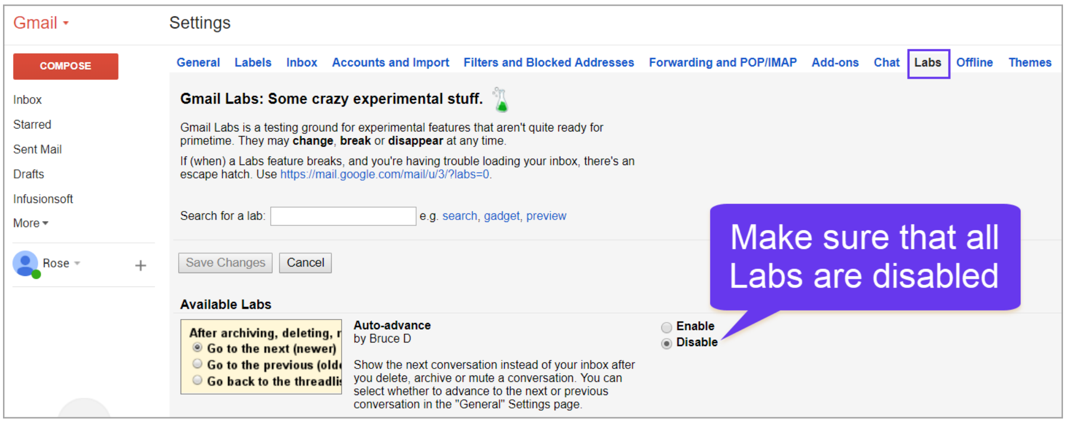
Error: Invalid Gmail Login or Password

1. Click the "Gear > Settings"



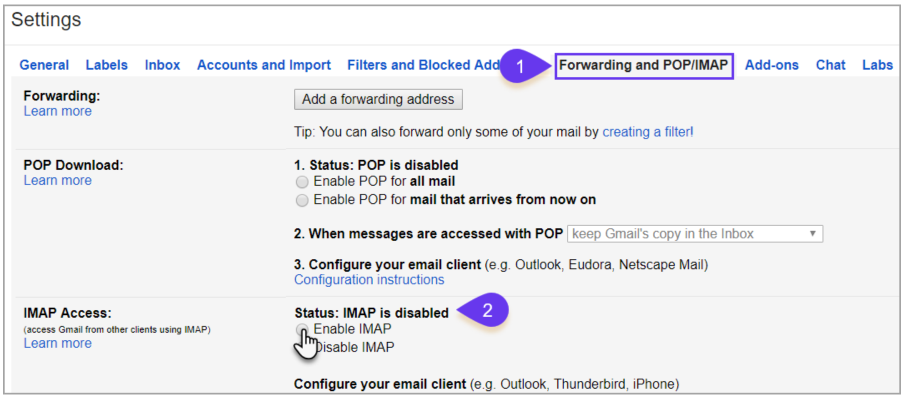
2. Go the "Labs" tab and make sure that all Labs are disabled. If you end up disabling any "Labs" scroll down to "Save Changes"

Note: If you clicked "Saved changes" for the "Labs" you be returned to the Inbox and will need click "Gear > Settings" again

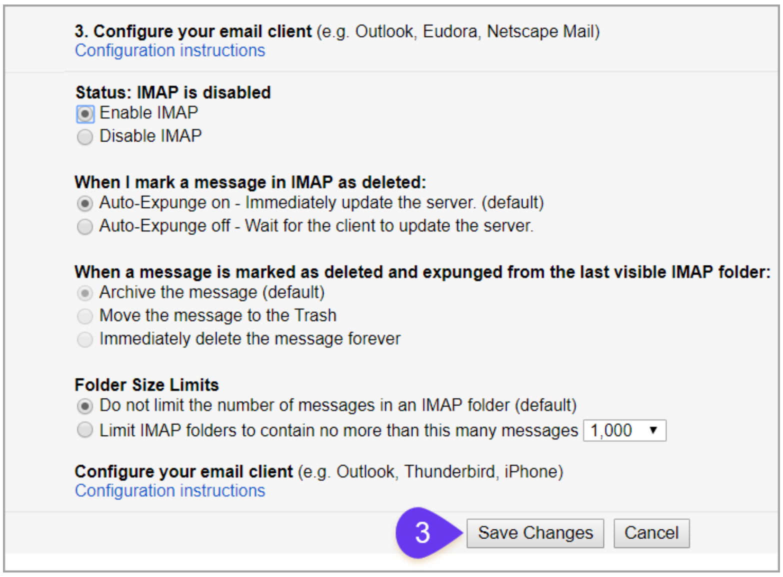


Pro Tip! All enabled labs will be at the top

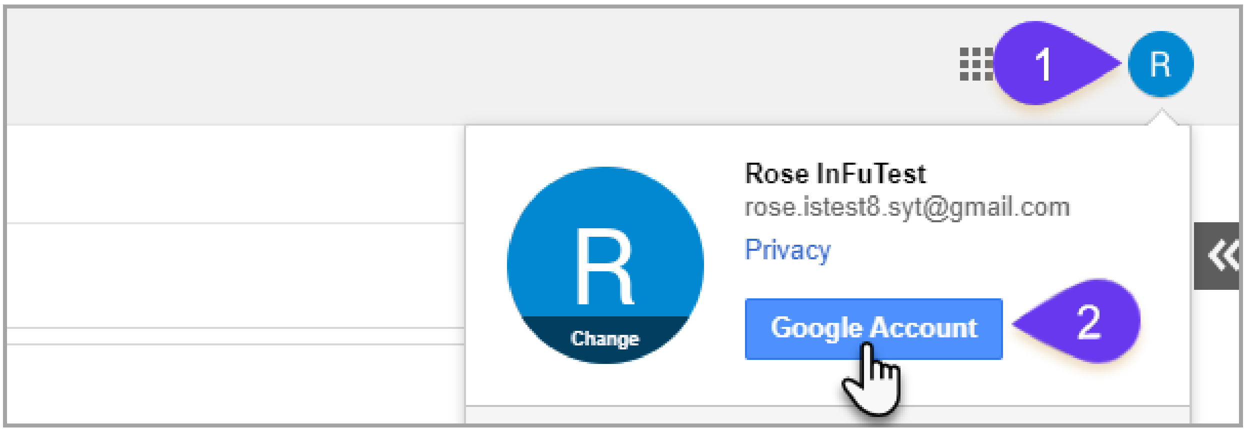
3. Click "Forwarding and POP/IMAP" tab and click "Enable IMAP"



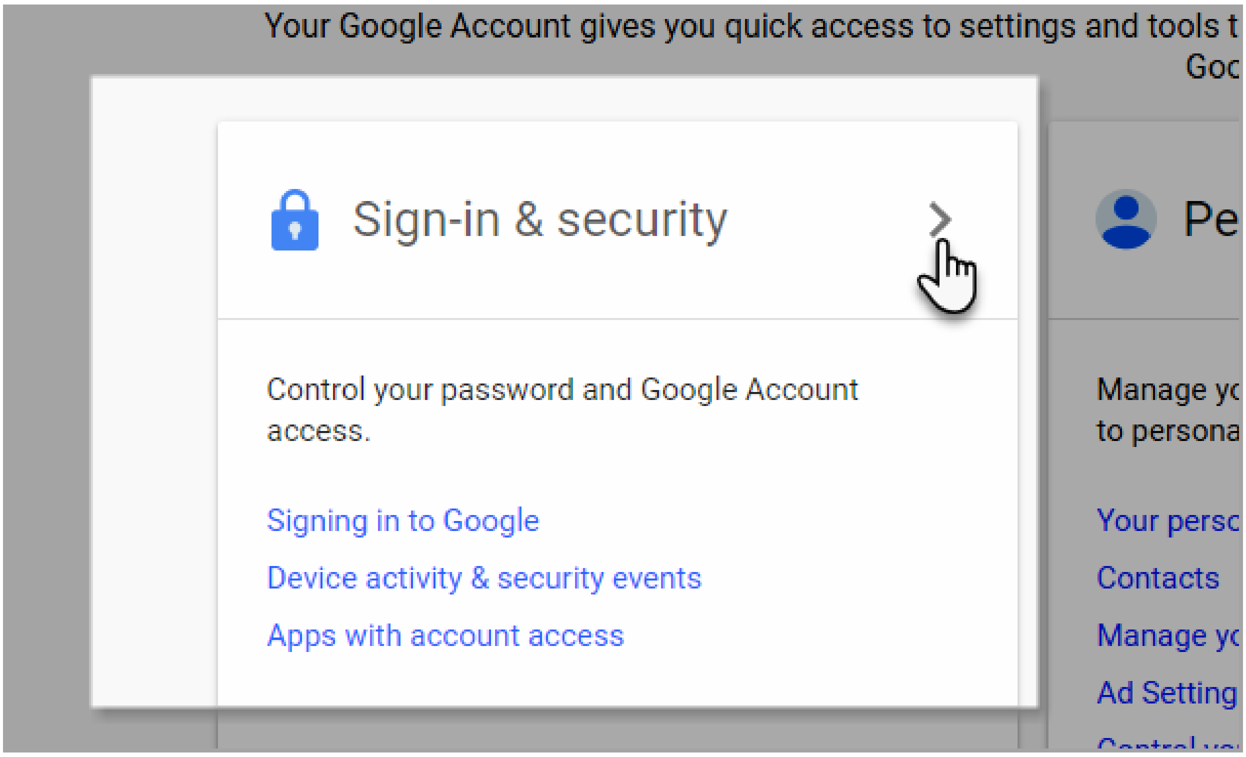
4. Click "Save Changes"



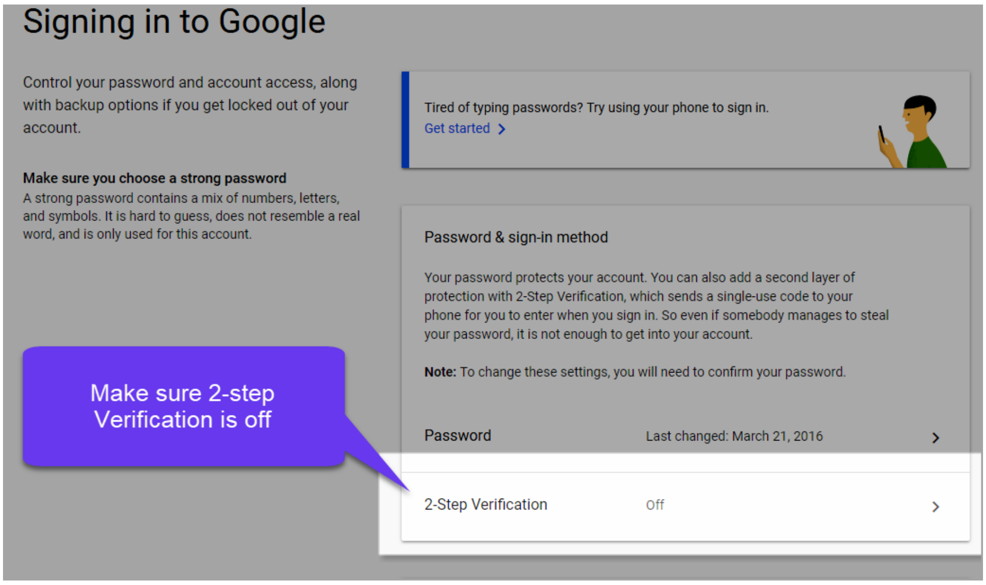
5. Click the image in the top right and click "Google Account"



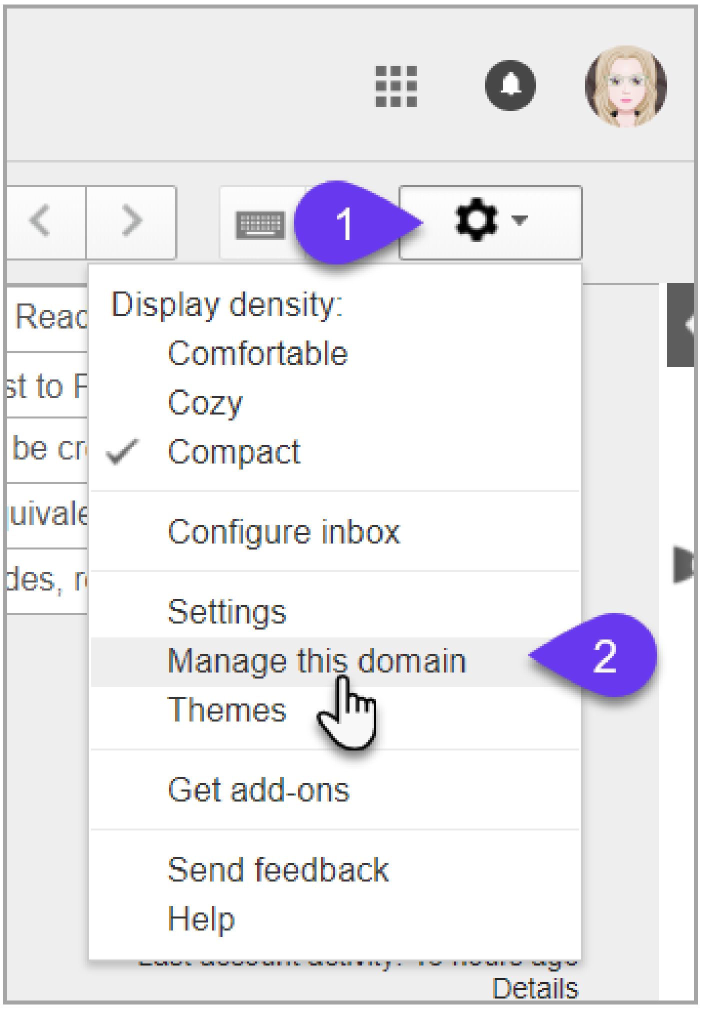
6. Click on "Sign-in & security"

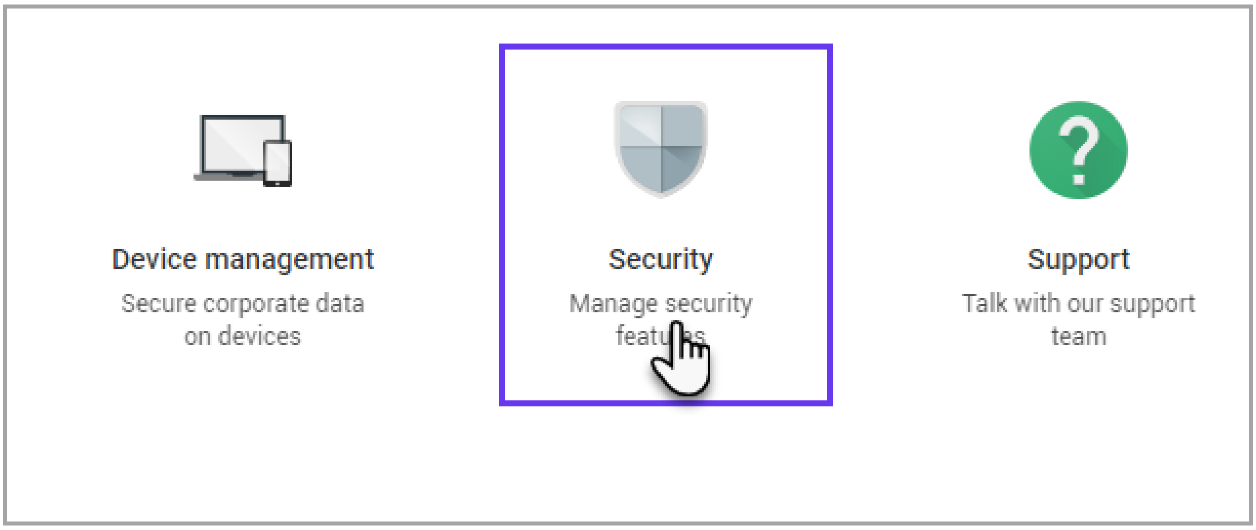


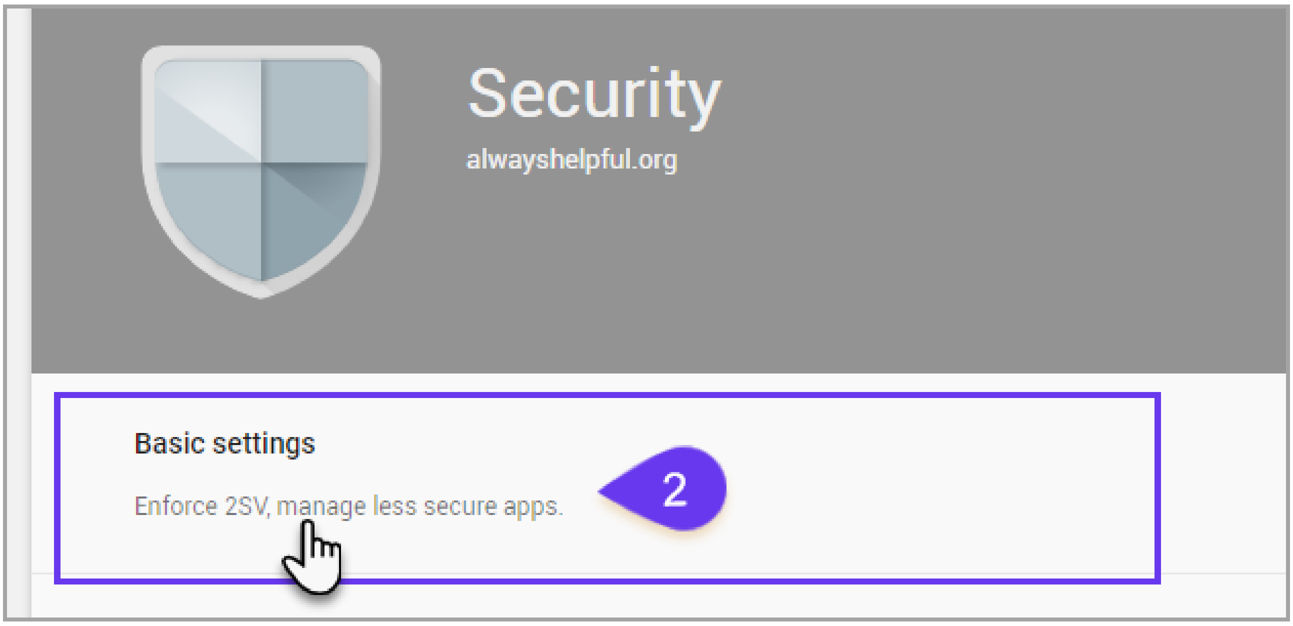
7. Make sure that 2-Step Verification is turned off.

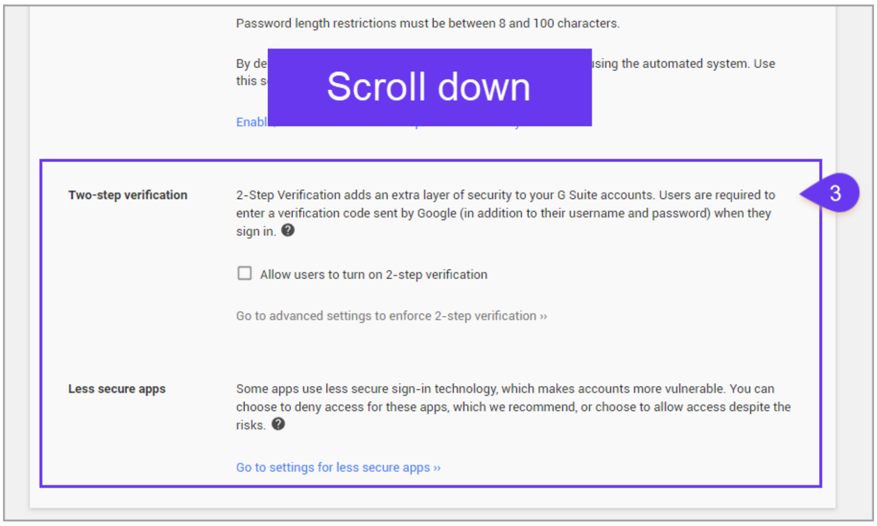


8. For a **Google Business Domain**. Log into your Admin Console.


1
Display density:
Comfortable
Cozy
Compact
Configure inbox
Settings
Manage this domain
Themes
2
Get add-ons
Send feedback
Help
Details

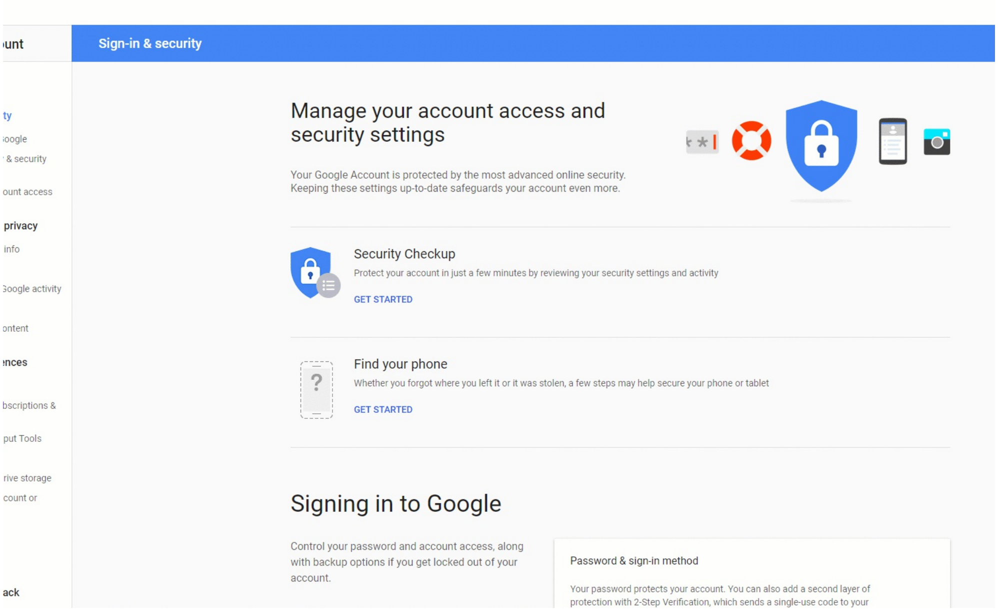

Device management
Secure corporate data on devices
Security
Manage security features
Support
Talk with our support team





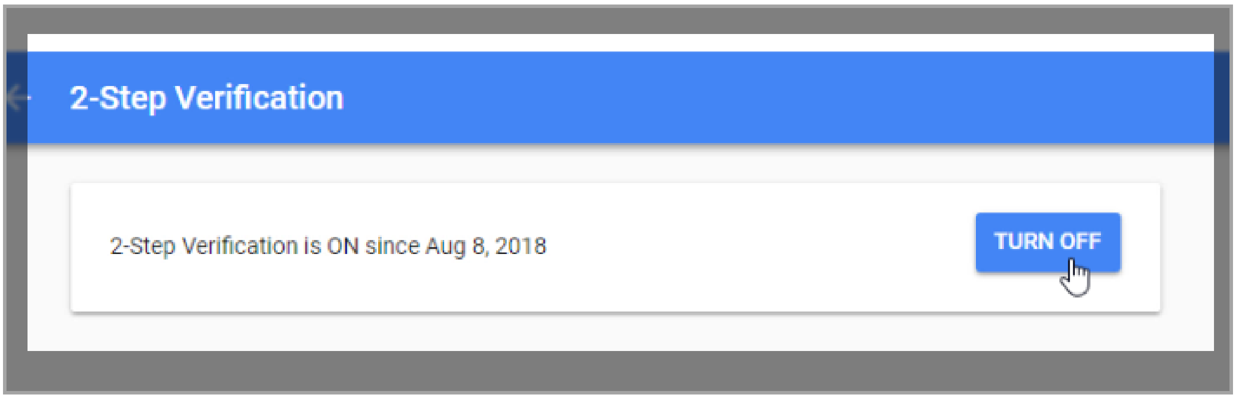
Note: In order for them to turn off 2 step verification they will need to log into their admin console. Here is a google help article about that.

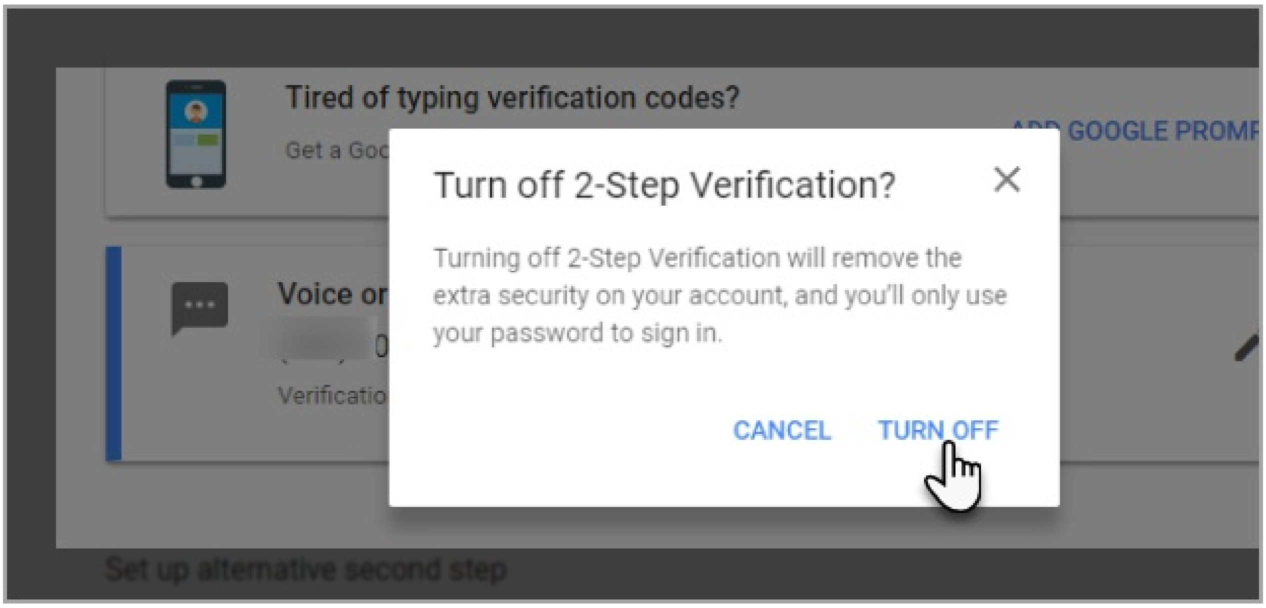
9. How to turn it off 2-Step Verification



10.

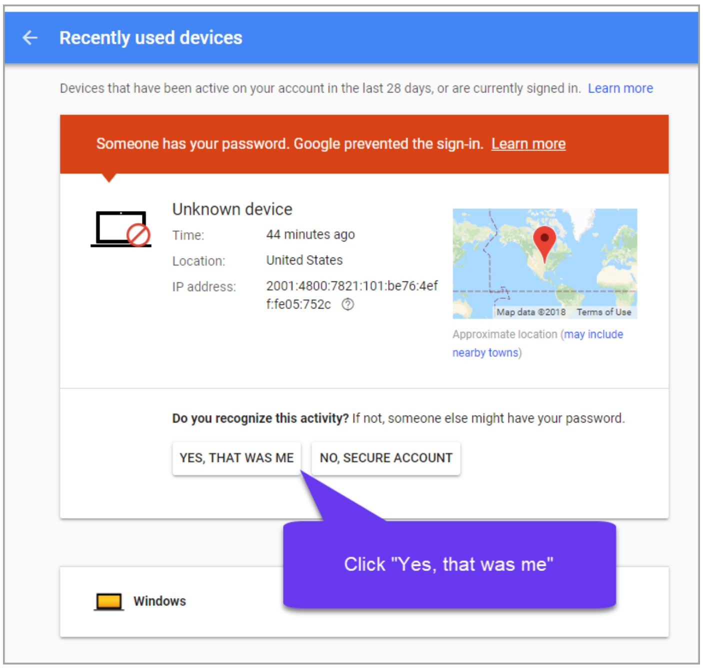
- Click the 2-Step Verification
- You will be asked to sign into your account again
- Enter the verification code
- Click Turn Off



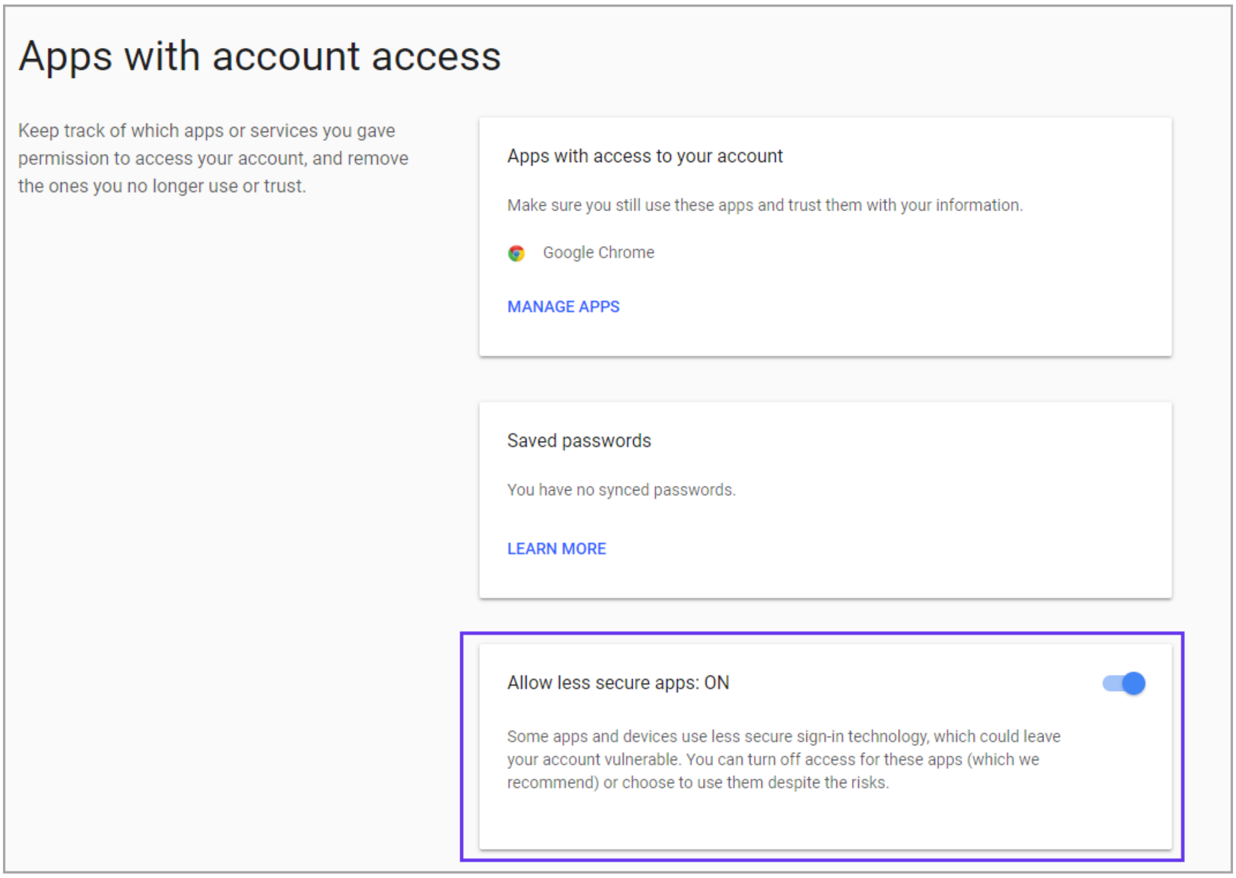


11. Find where it says "Recently used devices"

Click on "Review Devices"

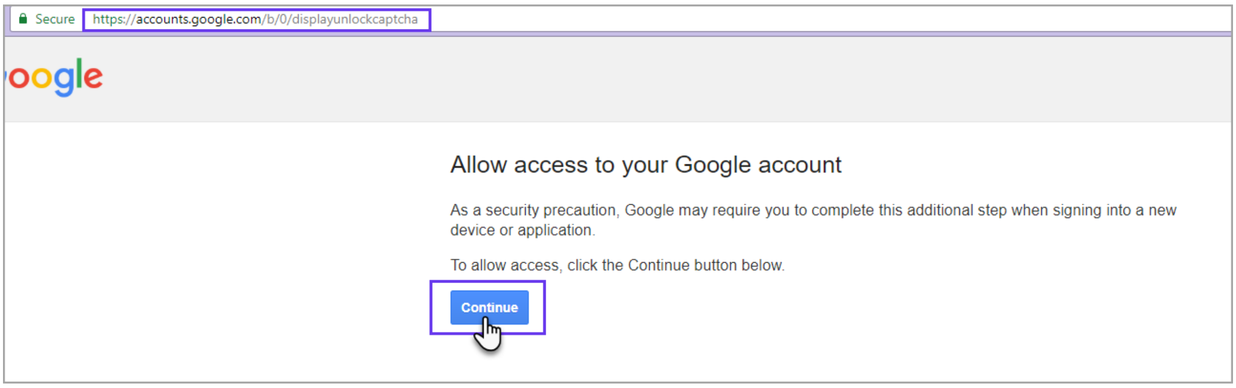


12. Turn on "allow less secure apps"



13. Sign into Gmail

14. Go to https://accounts.google.com/b/0/displayunlockcaptcha and click OK.



15. You can now go back to the Infusionsoft Sidebar to Sync your email.

Reminder: The emails will only sync going forward if there is a contact record inside of Infusionsoft with the same email address. This sync can take between 30 minutes - 2 hours. To run a test put the Date and time that you are sending the email then wait and come back to it later. This way if it doesn't sync you can see when the email was sent and we can try to figure out why.

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BigCommerce FAQs

Last Modified on 06/19/2018 3:12 pm MST

BigCommerce is the leading e-commerce platform for fast-growing and mid-market brands. BigCommerce's cloud-based platform enables merchants to cost-effectively grow their businesses with more traffic, higher conversion and superior performance.

The integration allows you to quickly and easily transfer your BigCommerce contacts, orders and products into Infusionsoft, allowing you to leverage the CRM power of Infusionsoft while having the benefits of the BigCommerce platform.

FAQs

1. **Do I need the E-Commerce module to use BigCommerce?**
   Yes, when BigCommerce syncs the orders, they will not be accessible without the E-Commerce module.

2. **How frequently do orders sync from BigCommerce to Infusionsoft?**
   Orders sync from BigCommerce to Infusionsoft within 15 minutes of the order being placed.

3. **Can I sync multiple BigCommerce stores to a single Infusionsoft application?**
   Yes, you can. To do so, add and configure the Infusionsoft app in your BigCommerce store dashboard on each of your BigCommerce stores. The “Store Code” value entered in the app configuration in the BigCommerce dashboard will be included in the Order Title in Infusionsoft, so entering distinct Store Code values in each of your BigCommerce apps will make it easy to identify the origin of your orders in Infusionsoft.

4. **I don’t see an order in Infusionsoft that was placed in BigCommerce. Why not?**
   There are a few reasons an order may not have synced to Infusionsoft:
   - Orders are synced every 15 minutes, so if the order was recently placed, this may be the cause.
   - If an order is placed and the contact has no email address, it will not be synced to Infusionsoft.
   - Orders with the following statuses are NOT synced:
     - Incomplete
     - Pending
     - Refunded
     - Cancelled
     - Declined
     - Awaiting Payment
     - Manual Verification Required
     - Disputed

5. **A Purchase Goal in a campaign was not triggered. Why not?**
   Purchase goals are not triggered by external orders. An alternative way to set up a purchase goal is to use BigCommerce Order Placed or the BigCommerce Product Purchased campaign found in the Infusionsoft Marketplace. Additionally, an API Goal may be used as follows with an Integration value of “BCORDER” and a Call Name value of “BC” or the "store code" that you entered on the BigCommerce configuration page. For more information view the help article BigCommerce API Goals .

6. **What’s the difference between the “BigCommerce Order Placed” campaign and the “BigCommerce Product Purchased” campaign?**
   The "BigCommerce Order Placed” campaign is triggered for any order placed, regardless of what products are on the order, while the “BigCommerce Product Purchased” campaign is triggered based on the purchase of a specific product SKU.

7. **How can I trigger a campaign when one of several products is purchased?**
   Start by using “BigCommerce Product Purchased” campaign (from the Infusionsoft Marketplace), then duplicate the goal for each product you would like to trigger the campaign.

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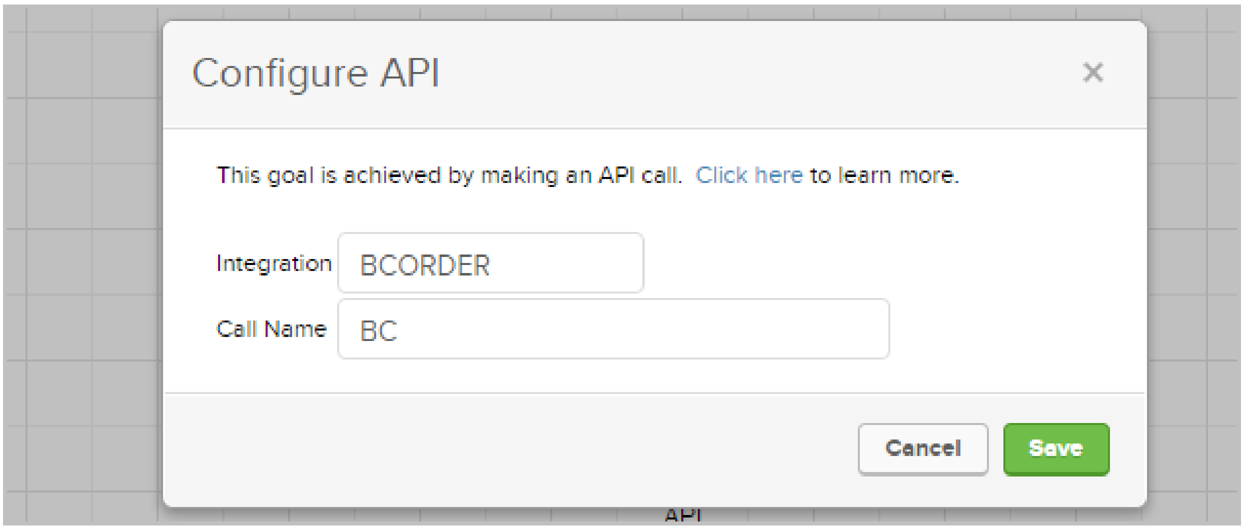
BigCommerce API Goals

Last Modified on 06/18/2018 9:22 am MST

Order API goal

Using the "BCORDER" API goal, you can automatically segment customers based on whether they are new or repeat, and send corresponding communications either welcoming them or thanking them for returning.

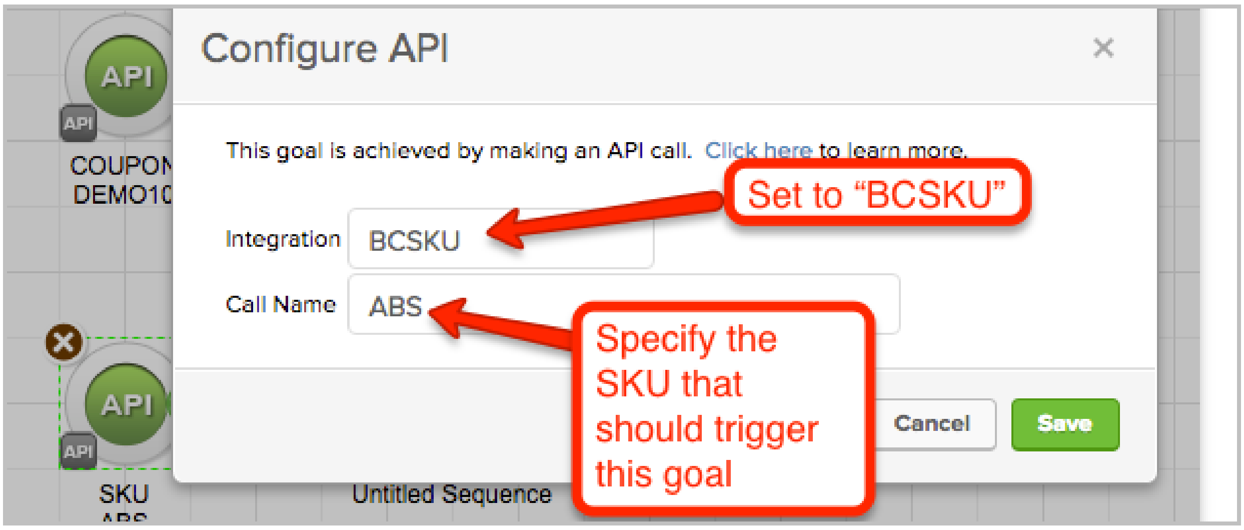
- Integration: BCORDER (fixed value)
- Call Name: BC - This represents the "store code" that you entered on the BigCommerce configuration page. The default value is "BC", but if you changed this value, you'll use whatever store code you have on file.



Product/SKU API goal

- Automate campaign sequences when a customer purchases a specific product, allowing you to offer related product suggestions.
- Automate campaign sequences when a customer purchases a specific product, allowing you to remind the customer to replenish (consumable items) at the right time (similar to above example, but for consumables)

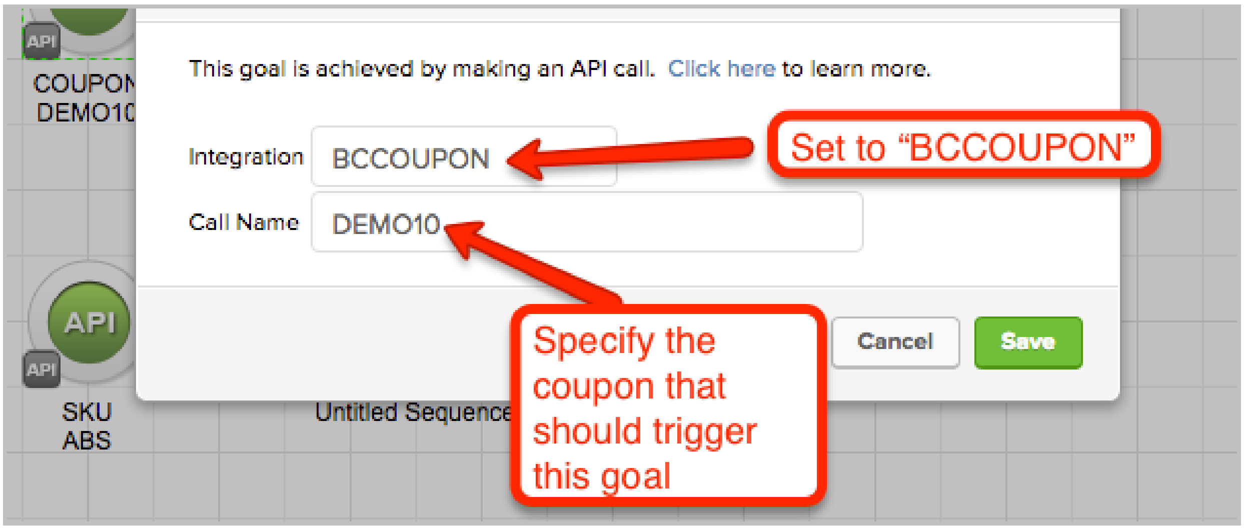
- Integration: BCSKU (fixed value)
- Call Name: Product SKU (set to any SKU value)



Coupon API goal

Automate a campaign sequence based on the use of a coupon code. For example, if a customer uses a code you promoted on Instagram, you can add them to campaign sequences based on the knowledge that Instagram drove the customer to the store. The customer can also be segmented/tagged as an "Instagram" user for use in later communications.

- Integration: BCCOUPON (fixed value)
- Call Name: Coupon code (set to any coupon code value)



Other Goals

- Using a tag-applied goal for the customer group tag, you can automate campaign sequences for customers who are part of specific customer groups within BigCommerce.
- It's still possible to use tag-applied goals for the Coupon and Product/SKU; however, this functionality makes it possible to have product/SKU and coupon goals without the need for tagging (in case you don't want to enable tagging.)

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Add A BigCommerce Buy Now Button To A Campaign

Last Modified on 06/18/2018 9:22 am MST

Pro-Tip! This feature requires Admin user permissions!

Use the “Buy Now” button to allow your users to purchase a product from your BigCommerce storefront from within your Infusionsoft campaigns. To add the button, you’ll need to add a Button content block to your campaign, and link it to a Buy Button product URL.

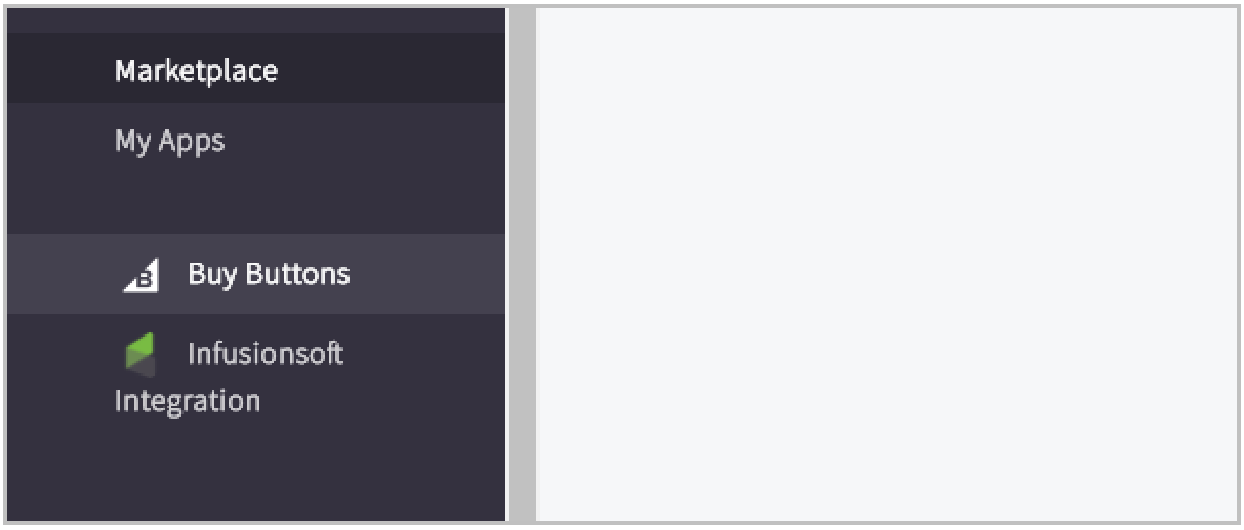
Before you Start:

- In addition to Infusionsoft, you’ll also need to have an active BigCommerce account
- Connect Infusionsoft for BigCommerce (from within the BigCommerce App Marketplace) to automatically sync purchase data to your contacts’ profiles when they buy a product from your store. This is a free tool.
- Before adding the Buy Button to your Infusionsoft campaign, make sure you first add the Buy Button app from BigCommerce.

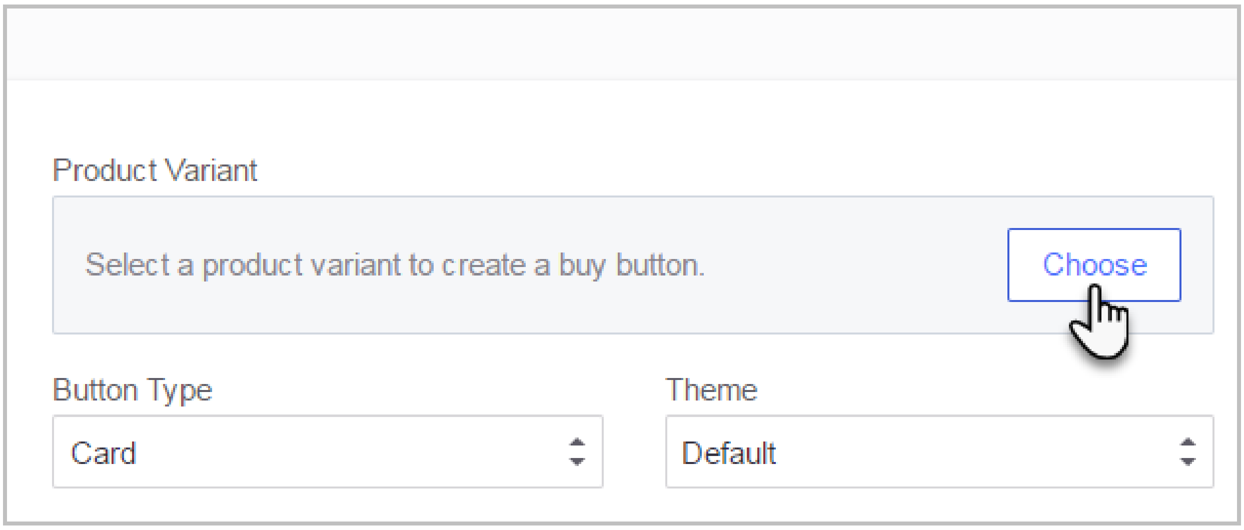
Create a BigCommerce Product URL

To copy the URL for your BigCommerce product, follow these steps:

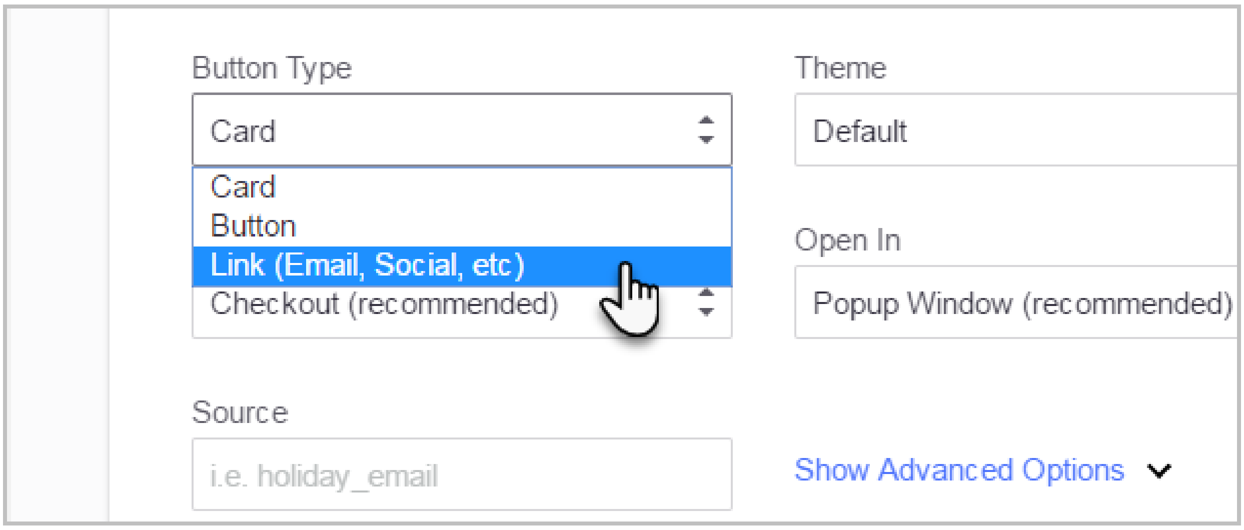
1. Log in to your BigCommerce account
2. In the navigation panel, click **Apps** then **Buy Buttons**



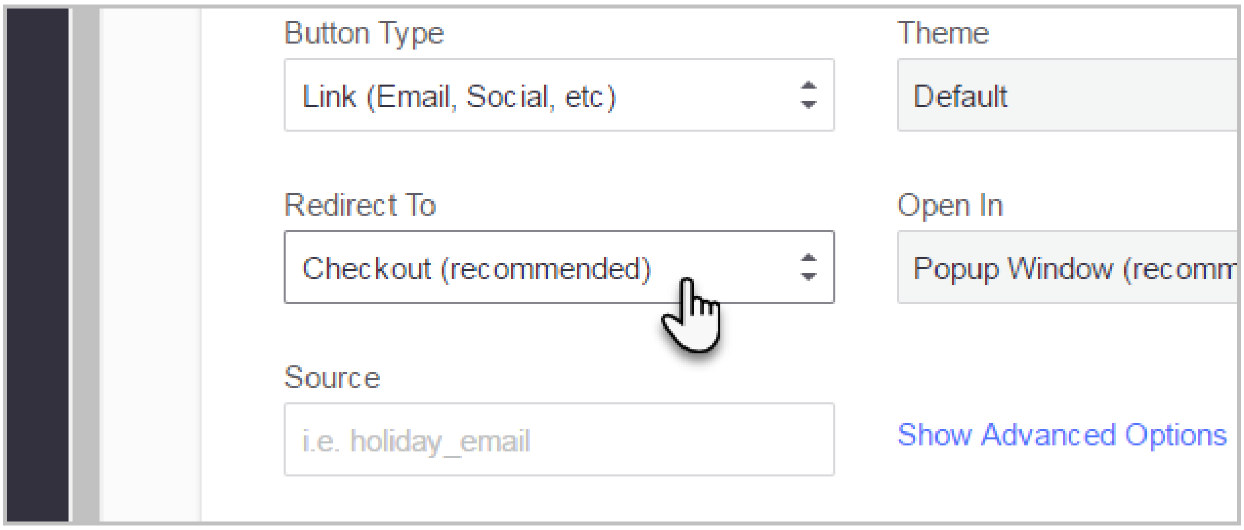
3. Click **Choose**. Choose the product you want to promote in your campaign. If you have different versions of a product, choose the variant you'd like to promote



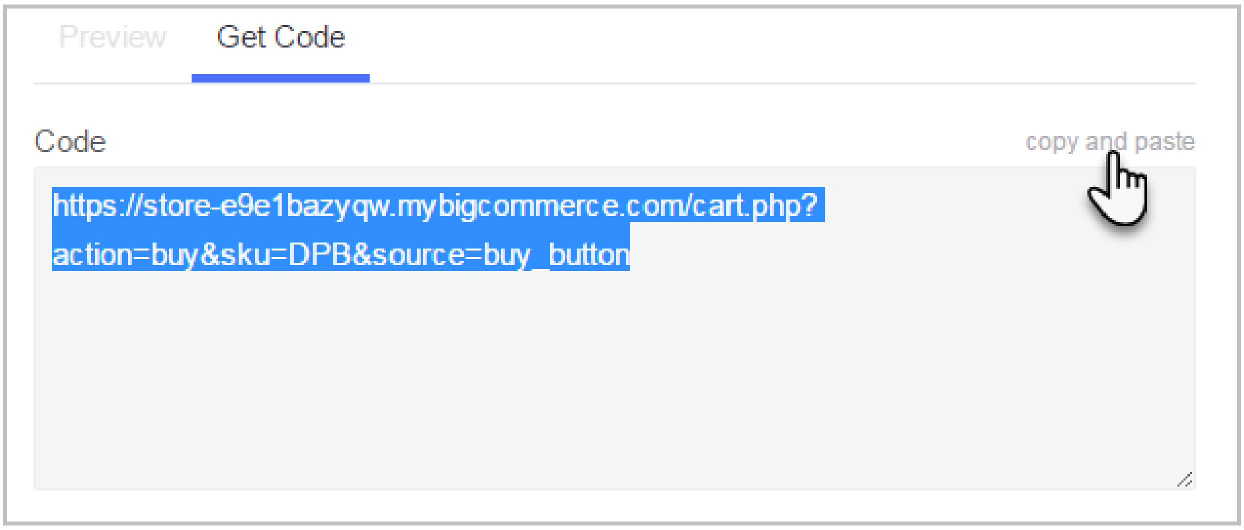
4. Select the button type **Link (Email, Social, etc)**



5. Select the type of redirect you want



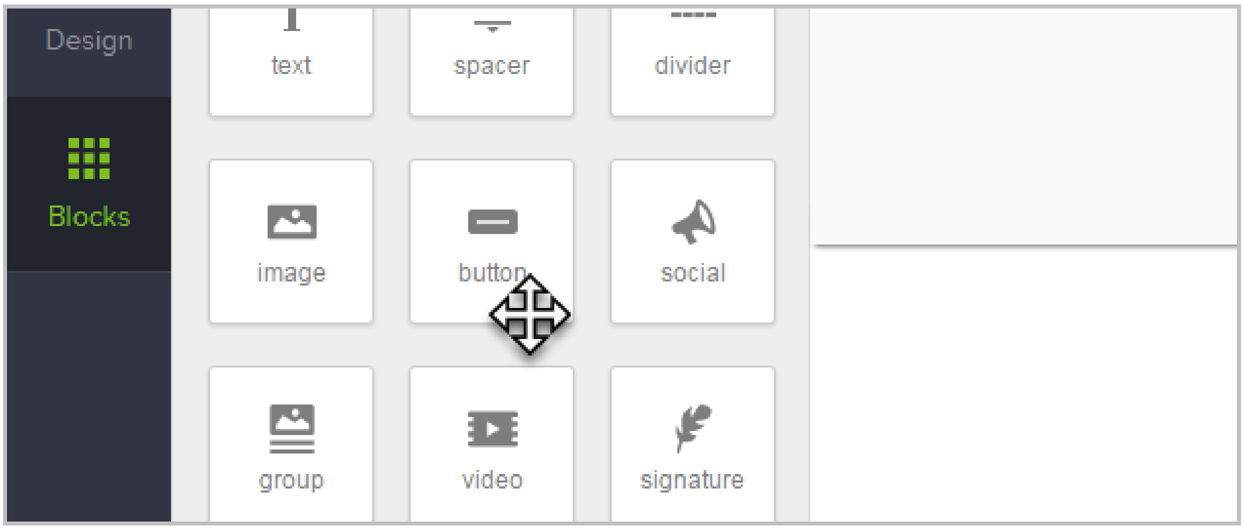
6. Copy the URL code



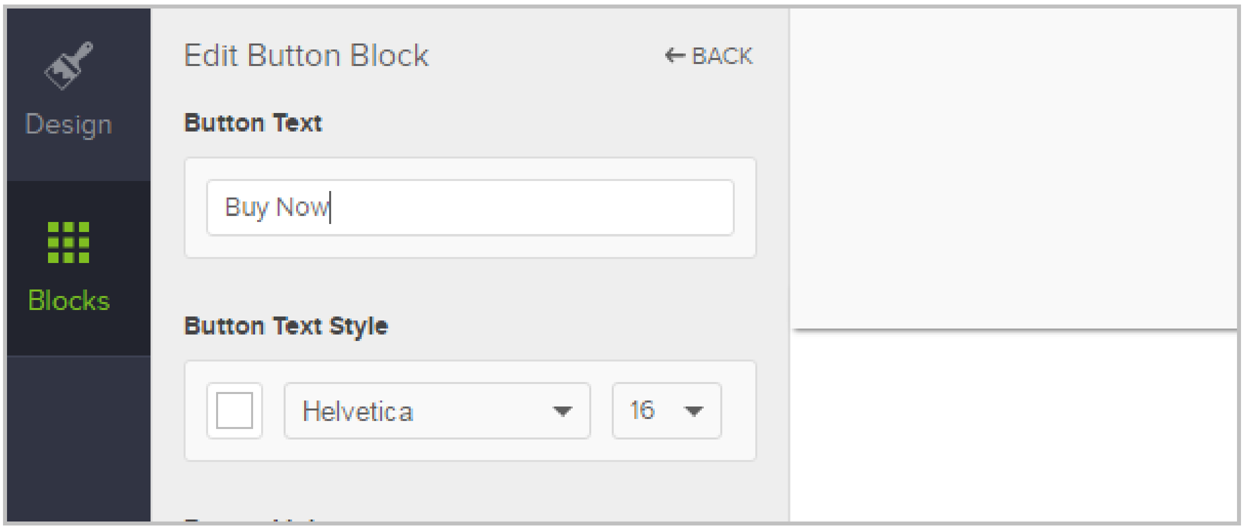
Add a Buy Now Button to your Campaign

After you've copied the BigCommerce URL, follow these steps to add the "Buy Now" button to your Infusionsoft campaign.

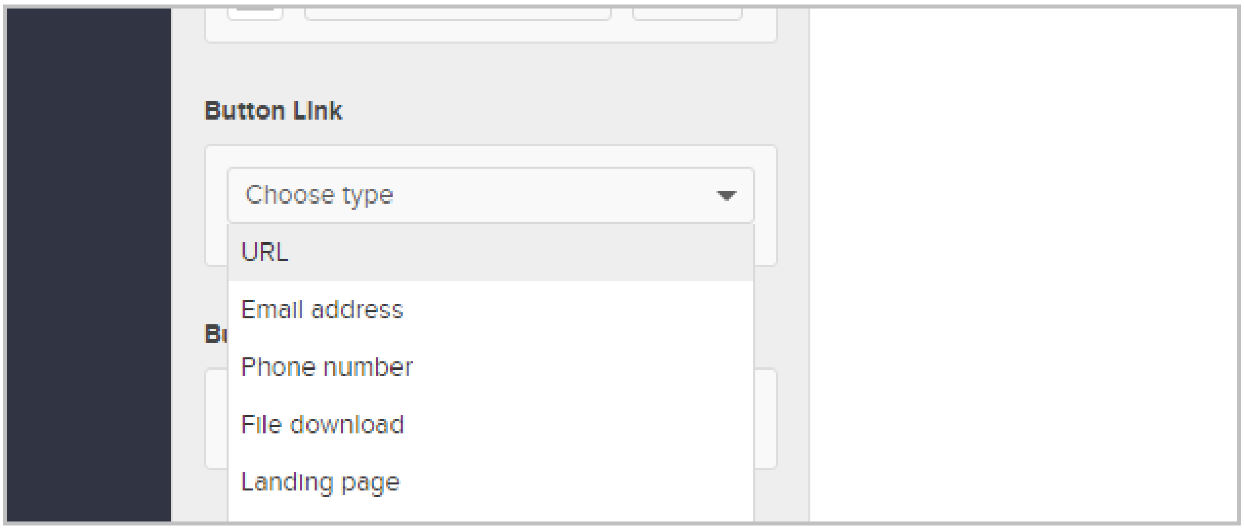
1. Log in to your Infusionsoft account
2. Navigate to the Campaigns Builder in your account, and create a new campaign or click the name of the campaign you want to work with.
3. Navigate to the email that you want to have the buy button
4. Click and drag the **Button** content block into your campaign layout



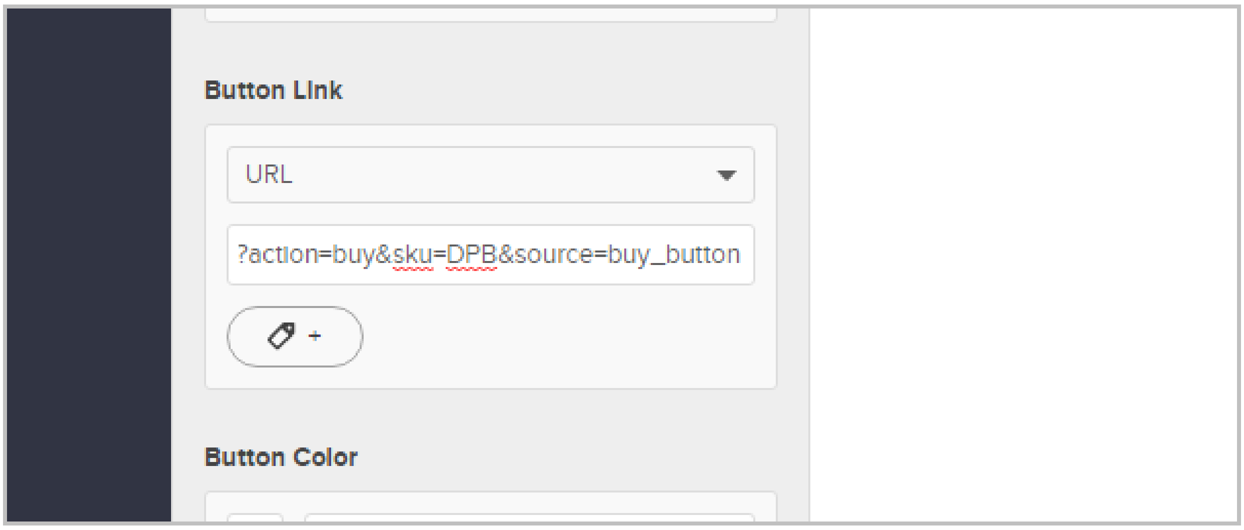
5. From the Content tab in the editing pane, type or paste the text you want to appear on your button in the Button Text field.



6. Set the **Button Link** to **URL**



7. Paste the link you copied from BigCommerce into the Web Address (URL) field.



8. Make any desired changes to the Styles and Settings for your button

9. Continue through the Campaign Builder

10. Now, when your contacts click the “Buy Now” button in your campaign email, they’ll be taken to the checkout, cart or product page for your product in your BigCommerce store!

Using a different version of Infusionsoft? Click Here to learn more

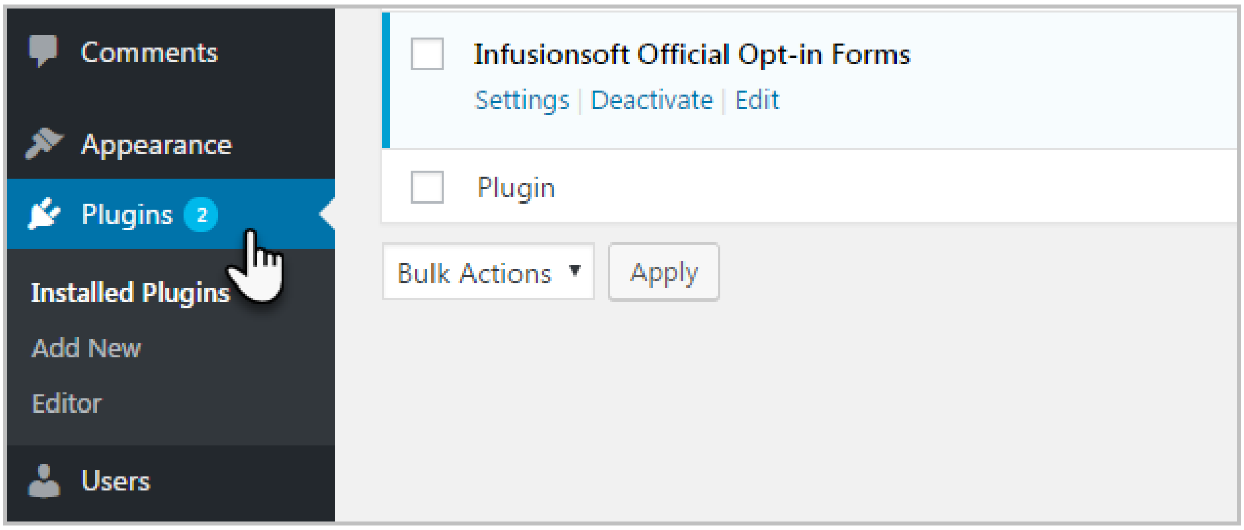
WordPress Plugin Setup

Last Modified on 09/24/2018 3:34 pm MST

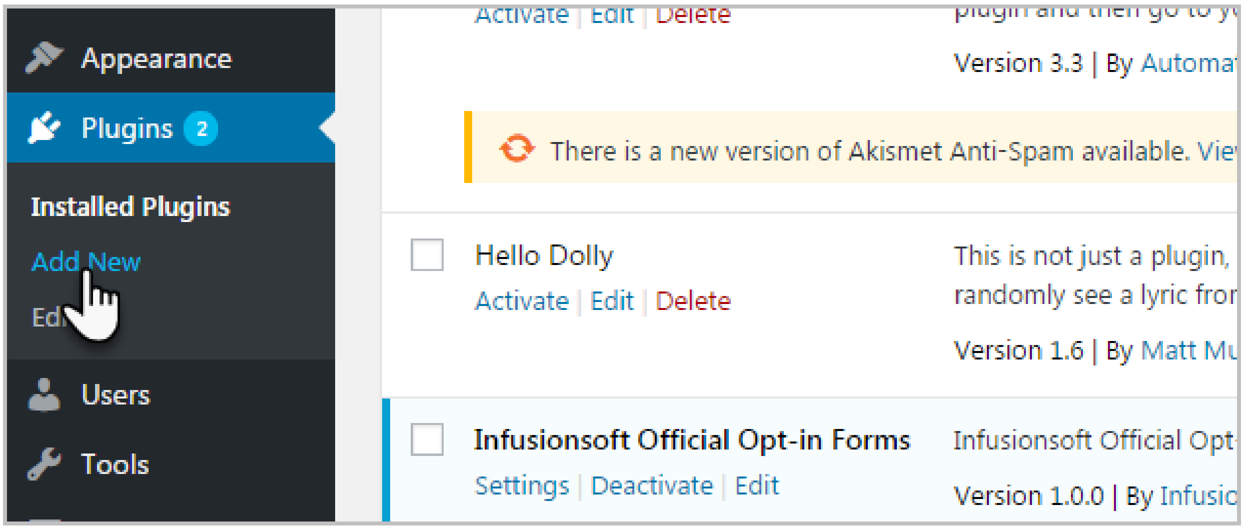
Follow the instructions below to set up the Infusionsoft WordPress plugin on your WordPress website. This plugin will allow you to create beautiful, interactive and Infusionsoft-compatible web forms on your WordPress site

Important Note! You can only connect your Infusionsoft account to one WordPress website. Connecting it to multiple sites will result in new contact records not being created! When installing the plug-in on a 'Multi-Site Installation' of WordPress, the same rule applies. your Infusionsoft account can only be connected to one site.

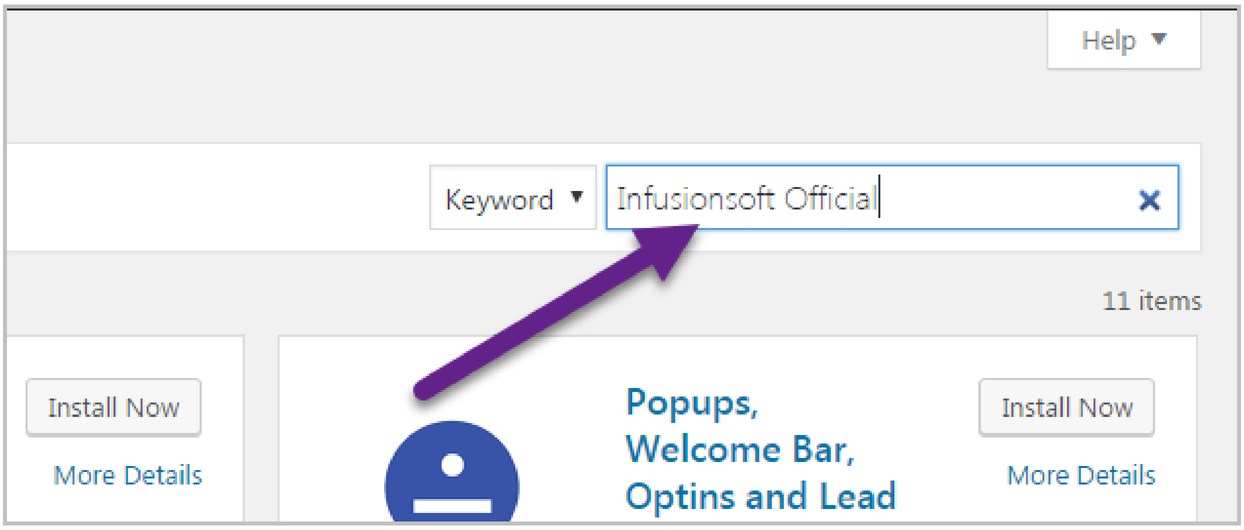
1. Sign in to your WordPress admin account
2. Within WordPress admin view, navigate to the **Plugins** tab on the sidebar



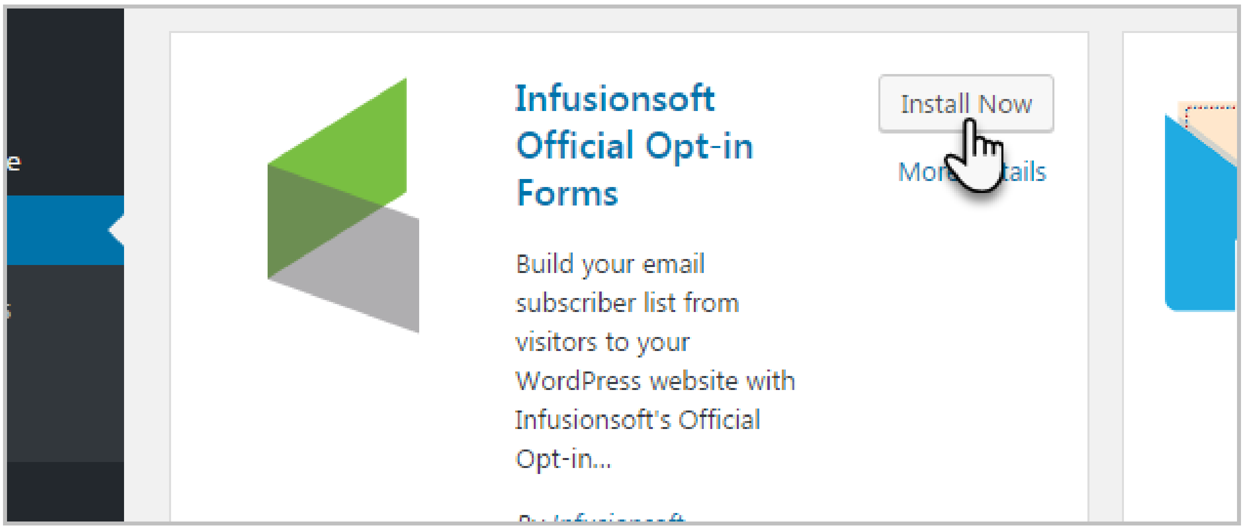
3. Click the **Add New** tab under the Plugins tab



4. Search for **Infusionsoft Official Opt-In Forms** from the search bar found on the top right corner of the WordPress plugin directory view. You can also click here to download it directly .



5. Click the **Install Now** button



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Connect Your Infusionsoft Account To Your WordPress Website

Last Modified on 09/24/2018 2:12 pm MST

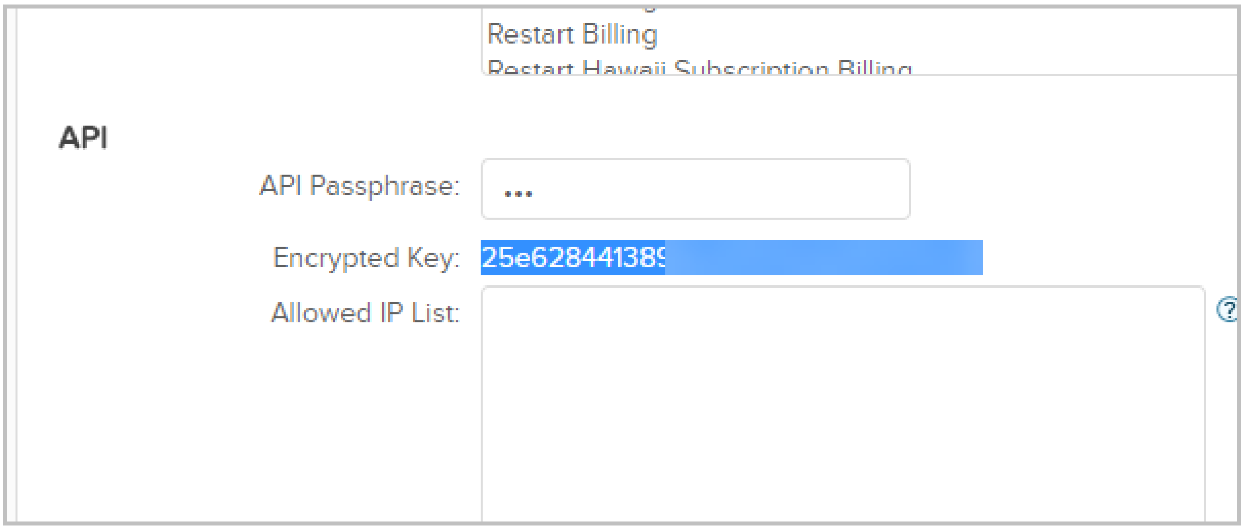
Important Note! You can only connect your Infusionsoft account to one WordPress website. Connecting it to multiple sites will result in new contact records not being created! The plug-in also does support multi-site installations of WordPress as this is one installation of the plugin.

In the **Email Accounts** sidebar tab, you can connect your Infusionsoft Account to your WordPress Site. You can also:

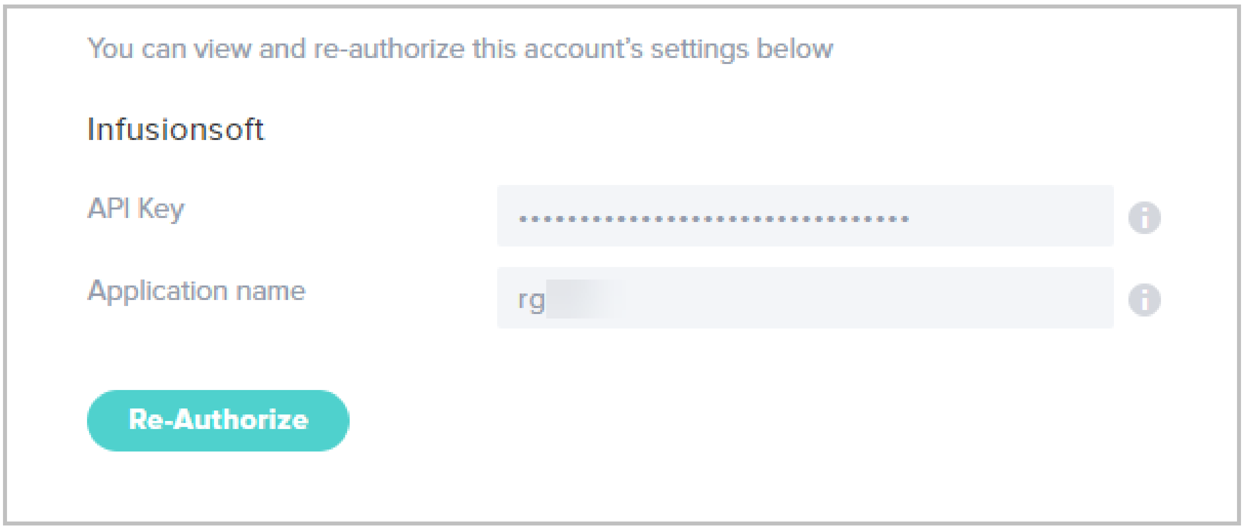
- Initialize a connection to their Infusionsoft account (on first visit)
- View the status of the connection to their Infusionsoft account
- Deactivate the existing connection to their Infusionsoft account

1. Navigate to your API key inside of your Infusionsoft application. Need help?Follow these instructions

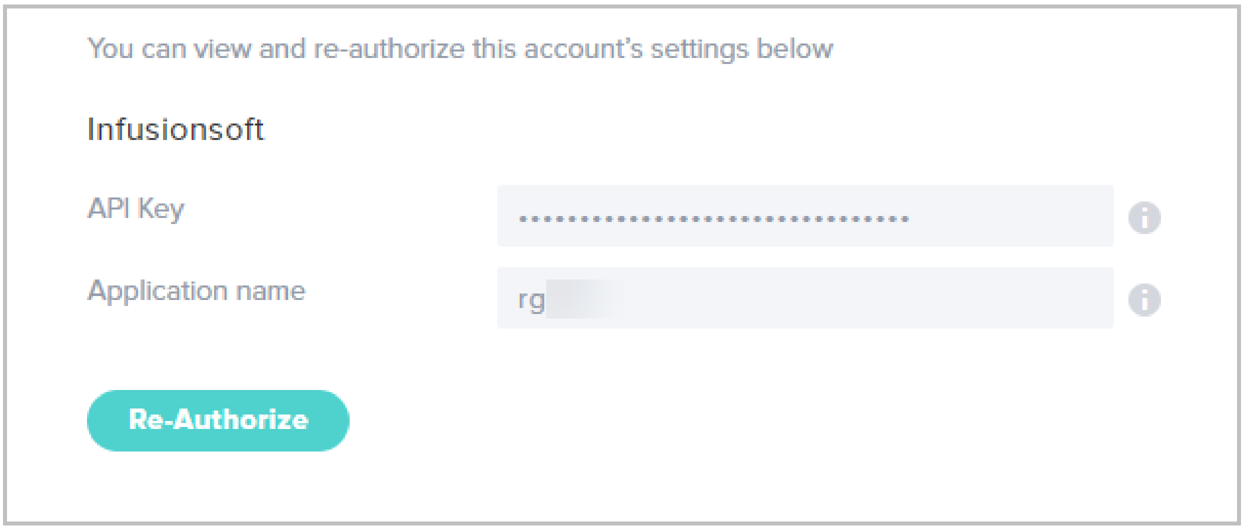
2. Copy your 32-digit encrypted API key



3. Paste this key value into the **API Key** field within the WordPress plugin: **Infusionsoft > Settings**



4. Enter your Infusionsoft application name. For example, if your Infusionsoft application URL is *abc123.infusionsoft.com*, then *abc123* is your application name



5. Click the **Authorize** button

6. Click the **Save & Exit** button

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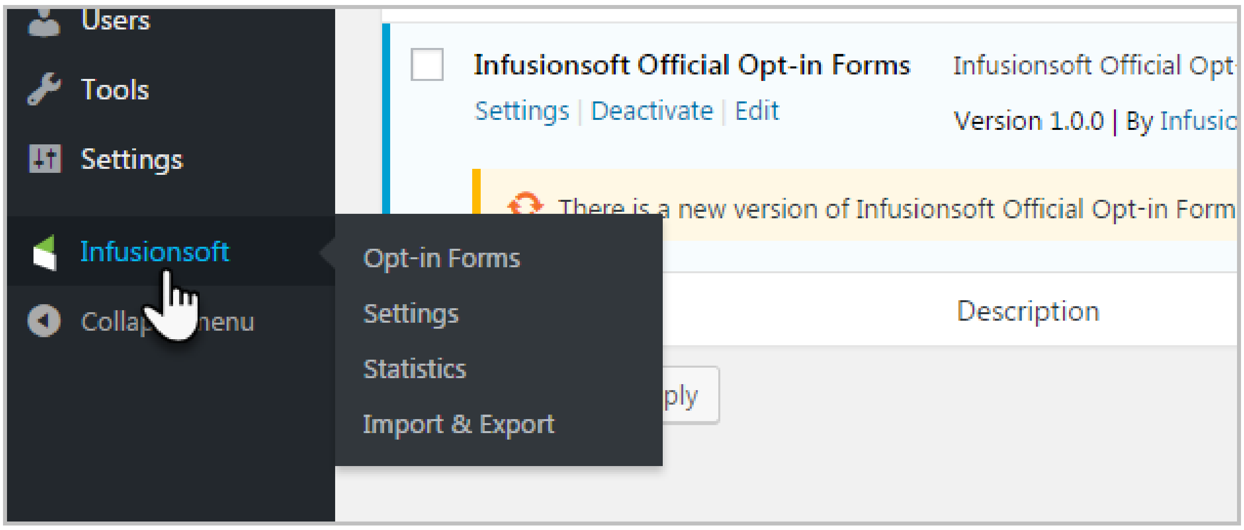
Create A WordPress Opt In Form

Last Modified on 09/24/2018 2:15 pm MST

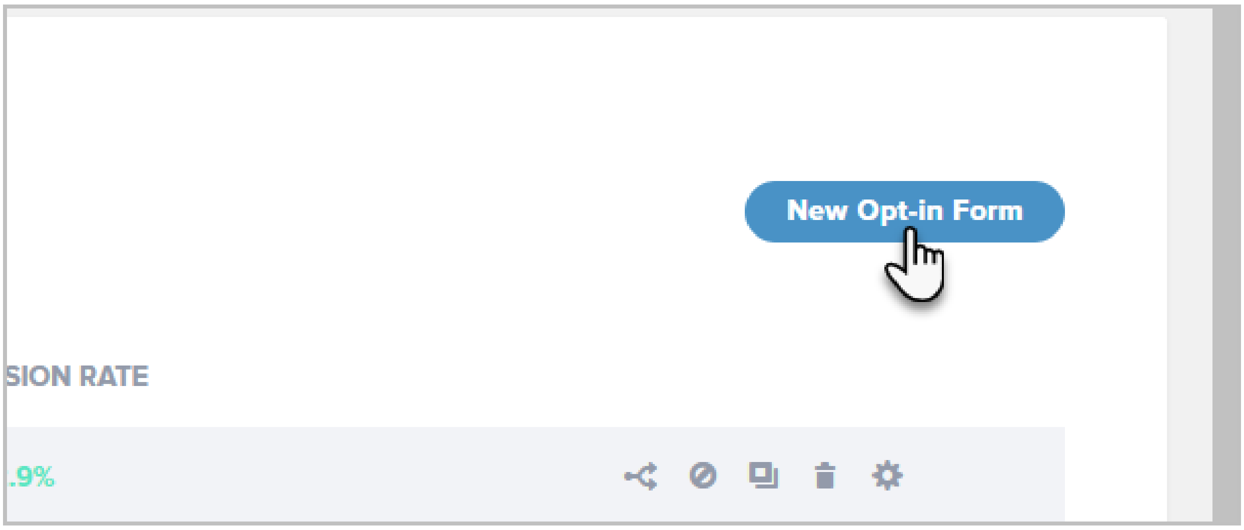
Clicking on the **Opt-In Forms** in the sidebar will give you access to create and manage your opt-in forms as well as:

- View all existing opt-in forms (active and inactive)
- View high-level statistics for all existing forms
- Create new opt-in forms
- A/B test two existing opt-in forms
- Deactivate existing forms
- Duplicate existing forms
- Delete existing forms
- Make changes to existing forms

1. Click on the **Infusionsoft** link to expand the sidebar and click **Opt-in Forms**



2. Click on the **New Opt-In** button on the top right corner of the page from the**Opt-In Forms** sidebar tab

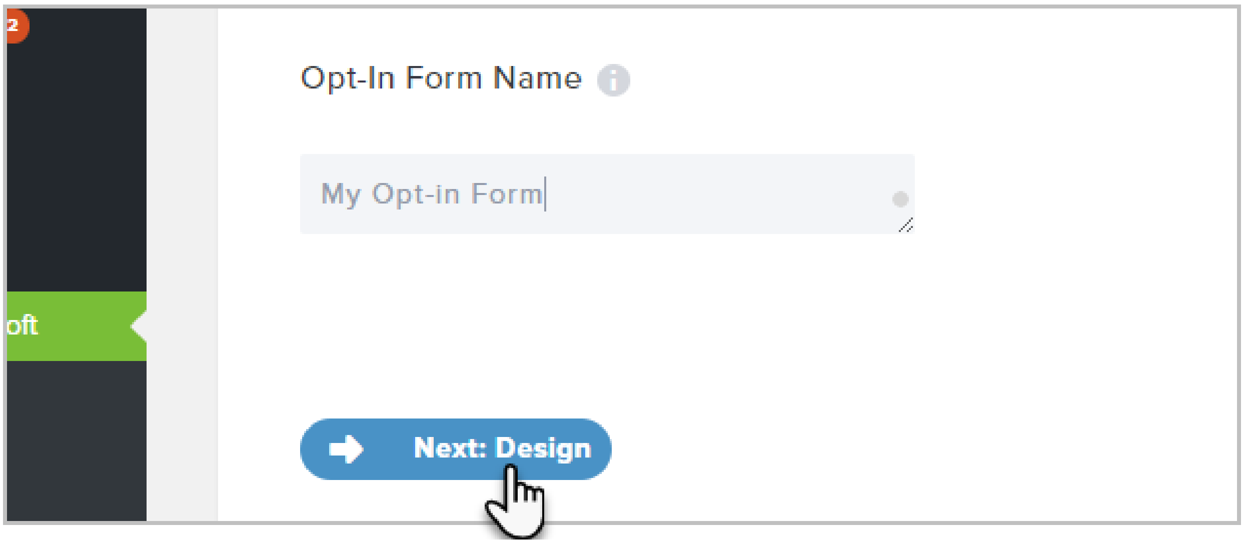


3. Choose what type of opt-in form you would like to use:

- Pop Up Opt-In Form: Prompt your visitor s to opt in without annoying them. You can set Infusionsoft's Opt-In Forms to appear automatically after a specific amount of time, after visitors reach a particular point on your page, or even after visitors leave a comment or make a purchase.
- Fly In Opt-In Form: The slide-in form is the pop-up's smooth, subtle cousin. It slides in at the bottom of your visitor's screen and can be set to appear after a specific time or at a specific point on the page.
- Widget Opt-In Form: Use widget forms to create attractive opt-in forms for your sidebar, footer, or any other widget-friendly areas on your site.
- Locked Content Opt-In Form: Offering valuable content in exchange for an email address is one of the most effective ways to grow your email list. Protected content forms allow you to offer content your visitors can "unlock" by opting in.
- Below Post Opt-In Form: You can use "Below Content" forms to place an opt-in

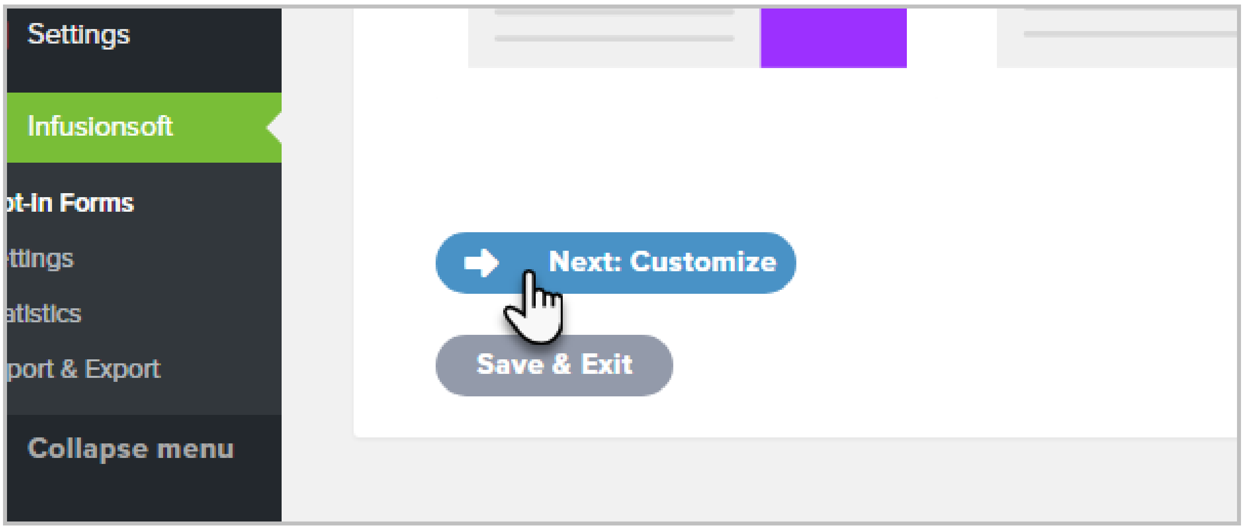
- opportunity at the end of your blog posts or pages. Visitors who have read an entire post are highly engaged, so this is an effective way to turn that engagement into a conversion.
- **Inline Opt-In Form**: Want to insert an opt-in form in the middle of a blog post, rather than the end? Inline forms make it easy. You can display these forms virtually anywhere you'd like on any post or page on your website.
- **Notification/Opt-In Bar**: Increase your opt-ins, announce your promotions and drive traffic to the pages of your choice with our attention grabbing top-of-page banner.

4. Enter a name for your opt-in form then click the **Next: Design** button to advance to styling your opt-in form or click the **Save & Exit** button to save the opt-in and return later to edit its design & display settings



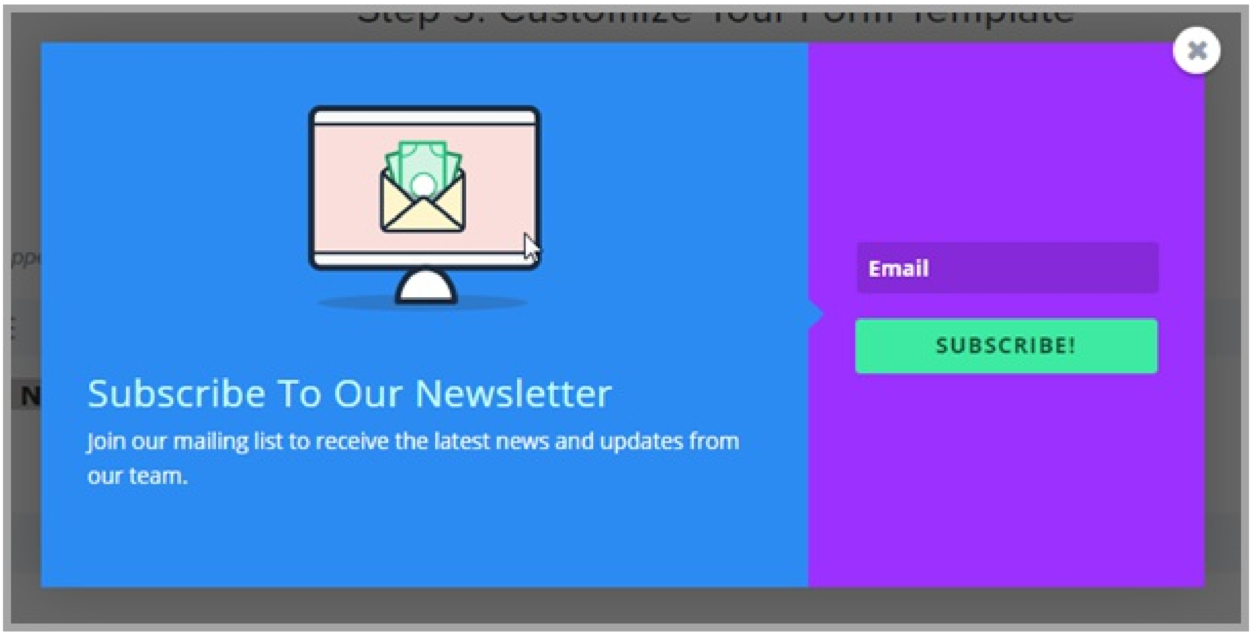
5. Choose one of the form layouts then click the blue **Next: Customize** button at the bottom

6. Choose one of any pre-designed templates based on preferred color and style. You can alter these colors after a template has been selected. Once you select a template, you will automatically be taken to the bottom of the screen to click the blue **Next: Customize** button to advance to the next part of customization.



7. This next part of the design process allows you to access the next layer of customization. At this time only First name, Last name and Email address may be added to forms. Email Address is always required.

8. Click the **Preview** button at the top right of the page as you make style changes to view your progress



9. After customizing the above settings, you can click the blue **Next: Display** button to customize more elements.

10. Where to display the opt-in form. Note that the fields below these check-boxes are dynamic according to display options chosen
    - Everywhere on site
    - The home page
    - Archives page
    - Certain page or post categories
    - With specified shortcode tags
    - Specified pages
    - Specified posts

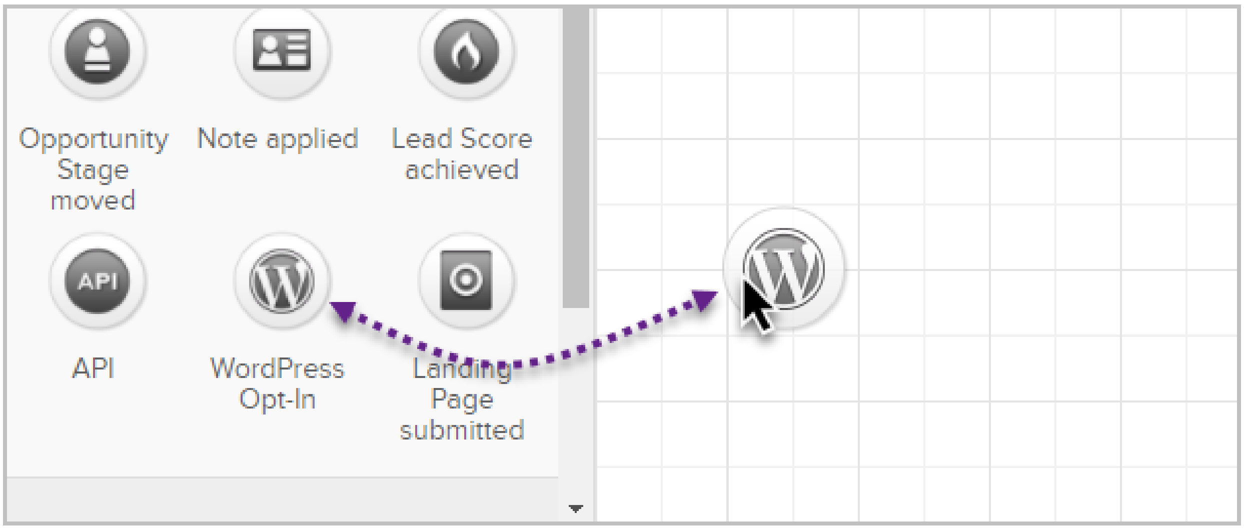
11. Once you have customized the above settings, you have completed the form setup process! To finalize, you must click the gray, **Save & Exit** button at the bottom of the Display Settings tab. After successfully configuring/customizing your opt-in form, you will be taken back to the Opt-In Forms tab and your newly created opt-in form will display in the list of opt-in forms. This list can be delineated should you make some opt-in forms inactive (see below.)

Using a different version of Infusionsoft? Click Here to learn more

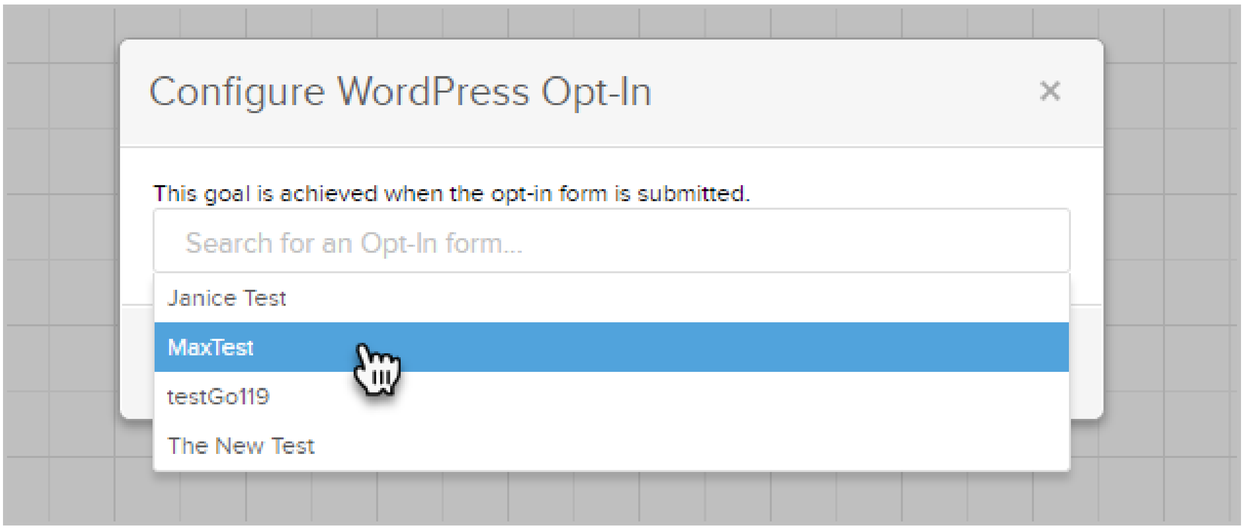
Set Up A WordPress Opt-In Form Goal In Infusionsoft

Last Modified on 06/18/2018 9:22 am MST

1. From the campaign goal section on the left-hand sidebar, locate the**WordPress Goal** goal and drag it out onto the campaign canvas

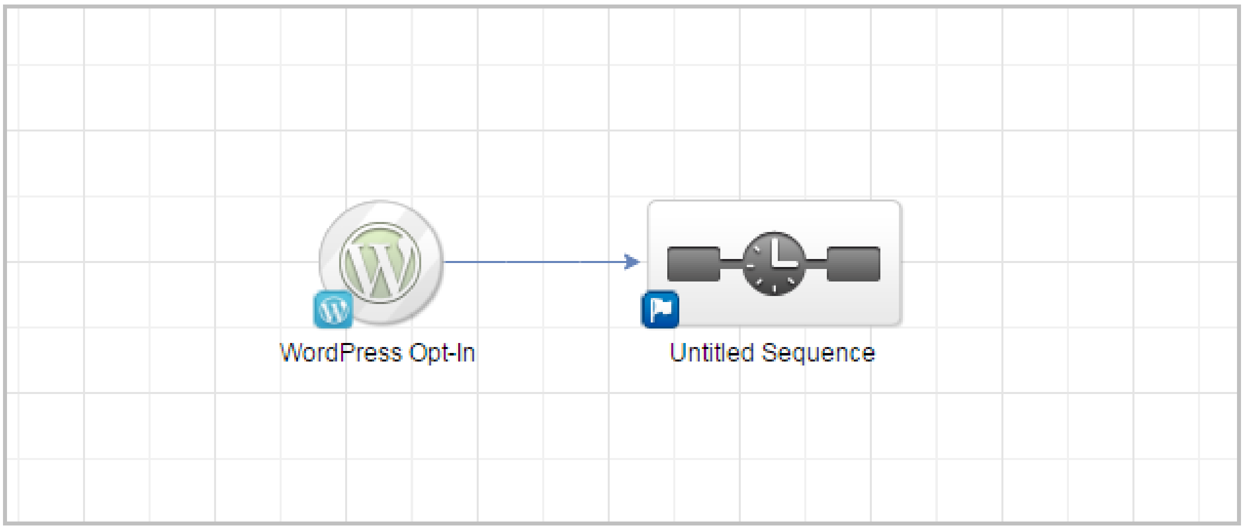


2. With the WordPress goal on the canvas, double click it to designate which Infusionsoft WordPress opt-in form completes this campaign goal. Select the name of the opt-in form from the drop-down list. If you have a long list of opt-ins, begin typing the name of the desired form and you will be taken to the form in the list.



3. Once the desired opt-in form is selected, you can finalize this configuration by clicking the green **Save** button

4. The last step to finalize the WordPress goal completion setup is to ensure that the goal is connected to a sequence and the subsequent sequence is properly configured to initiate automation for contacts completing the WordPress opt-in form.



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Import And Export WordPress Opt-In Forms

Last Modified on 09/24/2018 2:17 pm MST

In the **Import & Export** sidebar tab you can:

- Import an existing opt-in form received from another user
- Export an existing opt-in form to share with another user

Simply click the **Import & Export** sidebar tab to get started

Using a different version of Infusionsoft? Click Here to learn more

View Your WordPress Opt-In Form Statistics

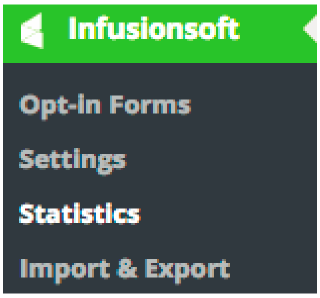
Last Modified on 09/24/2018 2:18 pm MST

In the Statistics sidebar tab, you can view aggregate statistics for all opt-in forms over last 30 days and last 12 months

You can also:

- Manually refresh the stats data
- Clear out all stats data
- View form views, opt-ins, and conversion by each existing opt-in form
- View conversion statistics by form within any given page of the users WordPress site– ideal for optimizing placement of opt-in forms by highest converting page

1. Click on the **Infusionsoft logo** to expand the sidebar and click on **Statistics**



2. Choose to view **New sign ups** for the last 30 days OR the last 12 months

- You can view your 30 day or 12 month Opt-in stats by clicking on **Last 30 Days** or **Last 12 Months**
- If you hover over a data point on the graph, you will see the stats for a specific date
- you can refresh all of your stats by clicking on **Refresh Stats**
- You can clear all your data by clicking **Clear Stats**

3. Click on the drop down arrows to view Opt-in Stats or Page Stats

- When drop down arrow is expanded, for **View Opt-In Stats**, you can view specific data for each Opt-In form, a user has created. A user can also clear stats for specific Opt-In forms by clicking the **X** on the corresponding Opt-In form.

- When the drop down is expanded for **View Page Stats**, you can view the conversion rate for the web pages in which the Opt-In form is displayed

View Page Stats

HIGHEST CONVERTING PAGES	CONVERSION RATE
BLOG	20%
OPT-IN FORM A	20%
HOMEPAGE	0%
OPT-IN FORM B	0%
OPT-IN FORM A	0%

Using a different version of Infusionsoft? Click Here to learn more

Zapier

Last Modified on 06/18/2018 9:22 am MST

Connect Infusionsoft to hundreds of other apps with Zapier. Zapier enables anyone—marketing, support, legal, HR, operations, product—to connect the web apps they use to run their business, without writing any code.

Each automation (called a **Zap**) has one app as the **Trigger**, where your information comes from and which causes one or more **Actions** in other apps, where your data gets sent automatically.

With the Infusionsoft/Zapier integration, you can connect Infusionsoft with hundreds of different apps, and the possibilities are endless.

Some Ways You Can Use Zapier with Infusionsoft

- Automatically add new leads from Facebook to Infusionsoft
- Automatically add new Eventbrite attendees to Infusionsoft
- Automatically add new responses from online form tools like Wufoo, Gravity Forms, or Typeform to Infusionsoft
- Automatically add new registrants from GoToWebinar to Infusionsoft

You'll find our most common automations here or get started with one of these popular Zaps:

Create or update Infusionsoft contacts from new Facebook Lead Ads leads

Use this Zap

Create Infusionsoft Contacts from new Acuity Scheduling appointments

Use this Zap

Create or update Infusionsoft contacts from new Typeform entries

Use this Zap

Create or update Infusionsoft contacts from new Calendly events

Use this Zap

Add new Eventbrite attendees to Infusionsoft as contacts

Use this Zap

See more Infusionsoft integrations powered by zapier

How to Set Up the Zapier Integration

The process for setting up the integration is simple:

To use Infusionsoft with Zapier, you'll first need to connect your Infusionsoft account. You'll get a pop-up prompting you to sign in to your Infusionsoft account. This lets Zapier link your Infusionsoft account to the other apps you choose.

Now you'll see your Infusionsoft account connected to Zapier. You're ready to create some Zaps! Add info from Infusionsoft to other apps, such as Slack, or set up Zap that automatically adds information from other tools into Infusionsoft.

Get started with one of the pre-built Zap templates forour most popular automations , or build your own workflow from scratch using the "Make a Zap" button.

LeadPages

Last Modified on 06/18/2018 9:24 am MST

LeadPages offers an integration with Infusionsoft. Using their integration, you can add leads directly to your web forms or sequences in Infusionsoft. Check out the links below to get started:

- Quick Start Video and Step-by-Step Instructions
- Help Article

Using a different version of Infusionsoft? Click Here to learn more

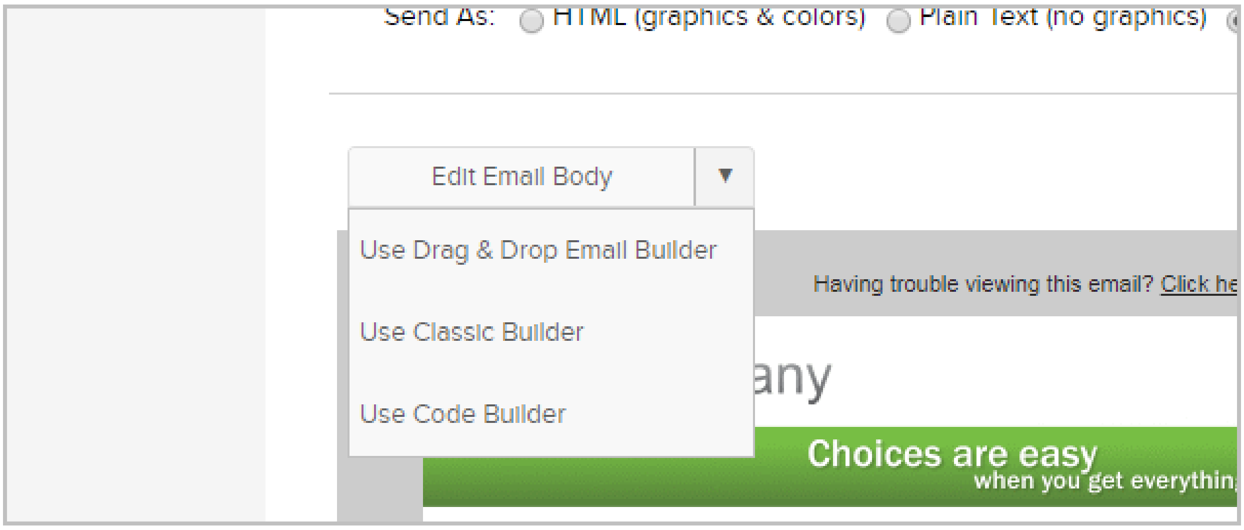
Legacy Template Library Email Builders

Last Modified on 07/23/2018 11:33 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**.

In Infusionsoft, there are three separate places where you may be creating emails:

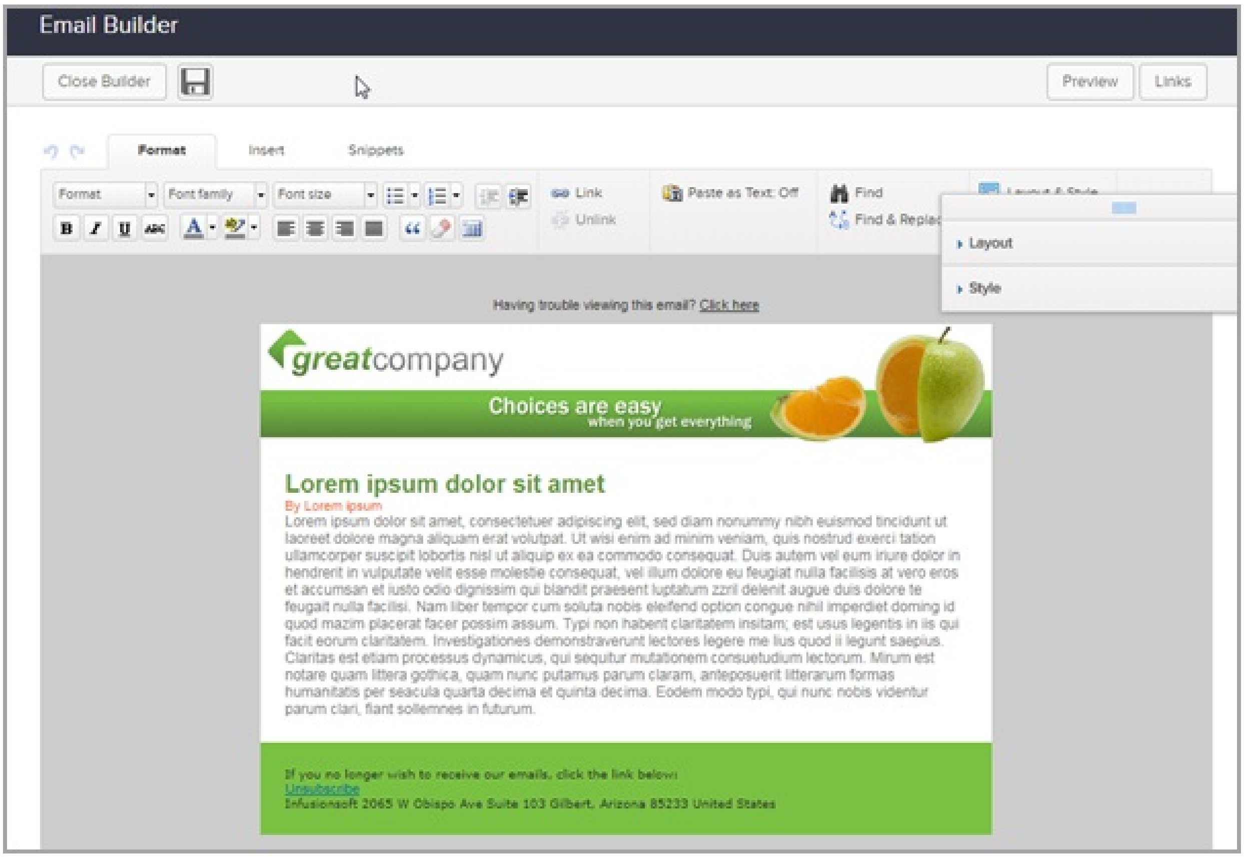
- **Template Library (Marketing > Templates)**. This area is typically used for creating legacy broadcast email templates for those customers who still use legacy functionality.



- **Sending a Broadcast**
- **Campaign Builder**: This is where all of your campaign automation emails reside. Most customers spend much of their time in this area configuring their campaign structure and campaign emails.

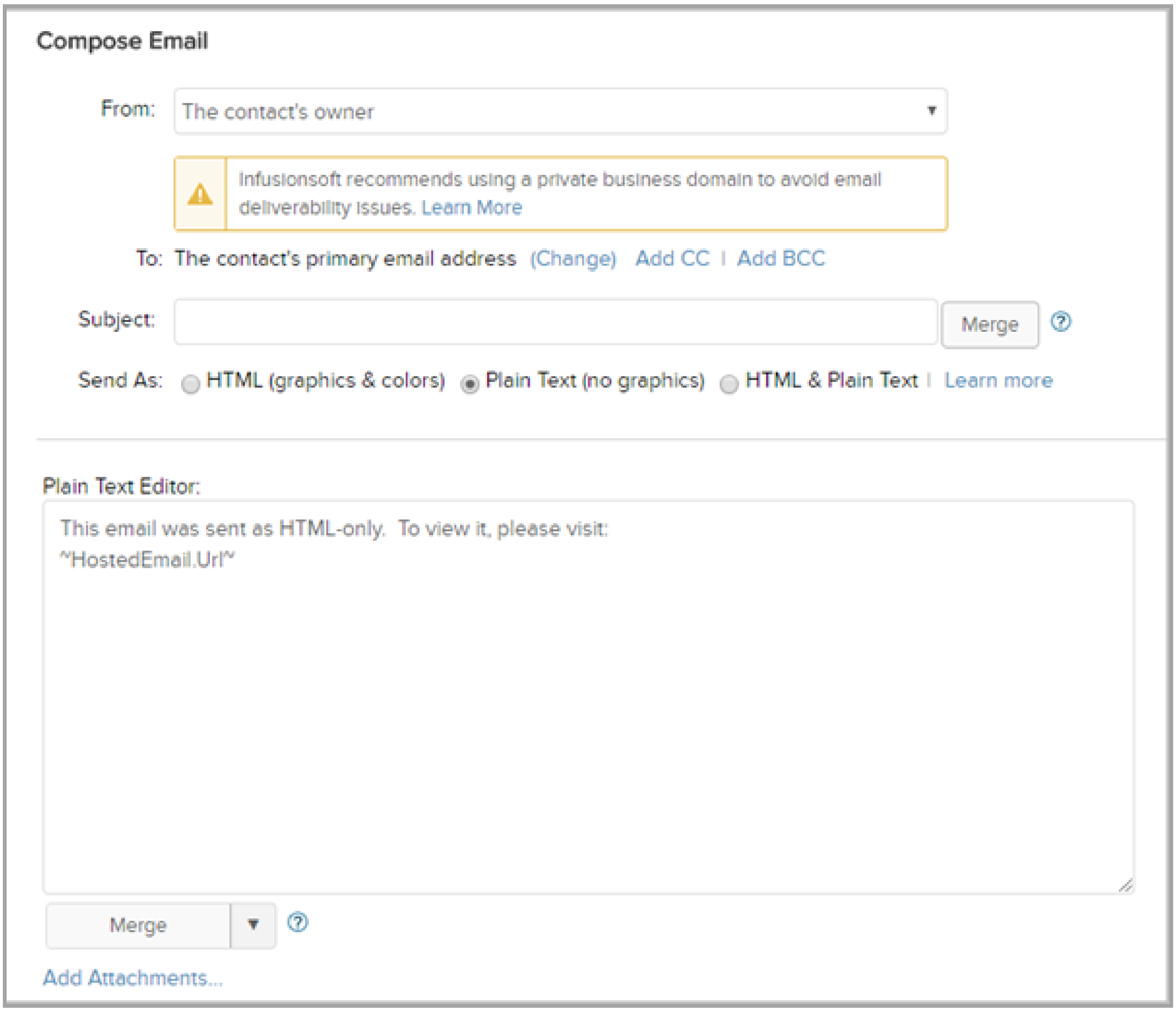
(Legacy) Drag & Drop Email Builder

The legacy Drag & Drop HTML builder offers an intuitive drag & drop interface that allow you to add, remove, and re-arrange text, image, and link content snippets. The layout and style tools make it easy to change from a one to a two column layout, as well as customize email colors to coordinate with company branding.



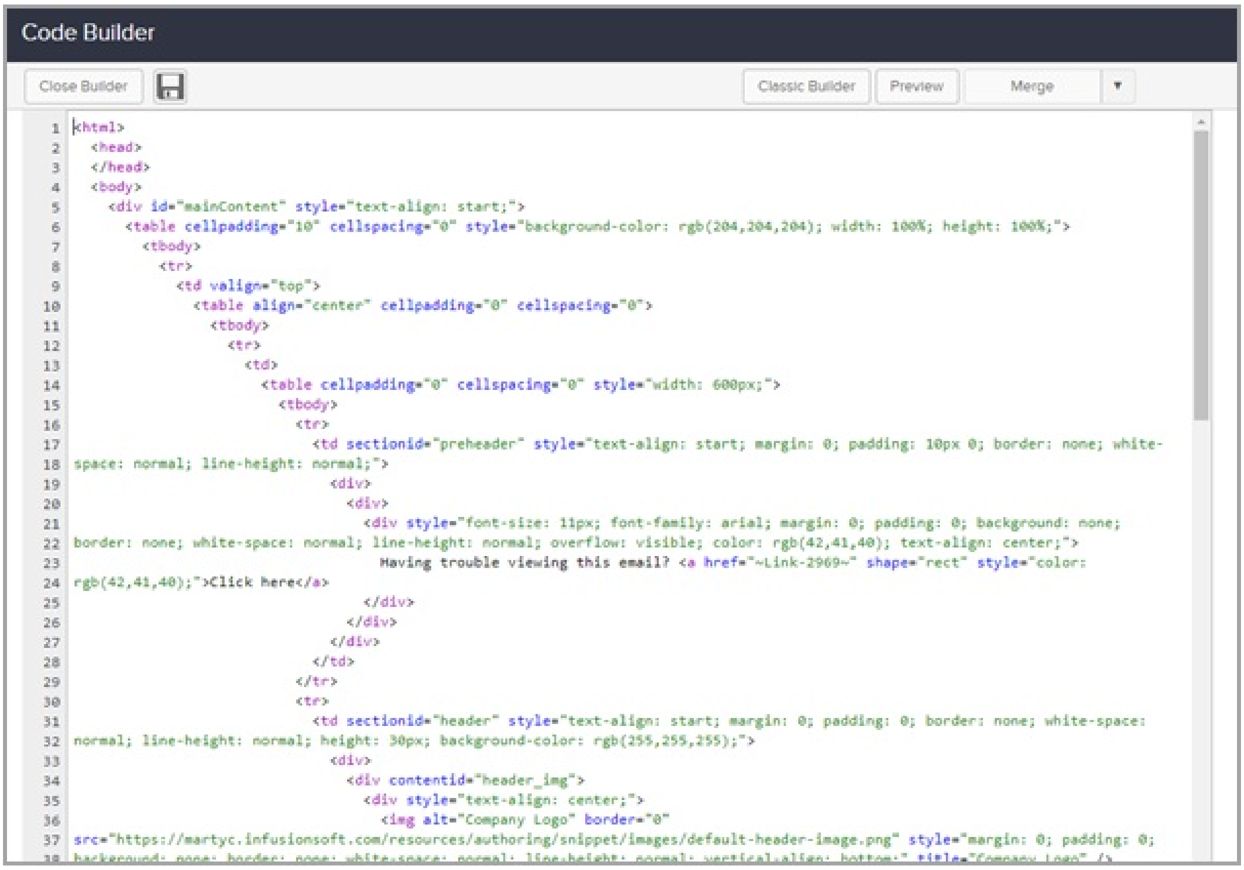
(Legacy) Plain Text Editor

An email template can be plain text only or a combination of HTML and plain text. Plain text email templates do not include any formatting options at all. You are not able to add images or format text. However, all email programs will display a plain text email.



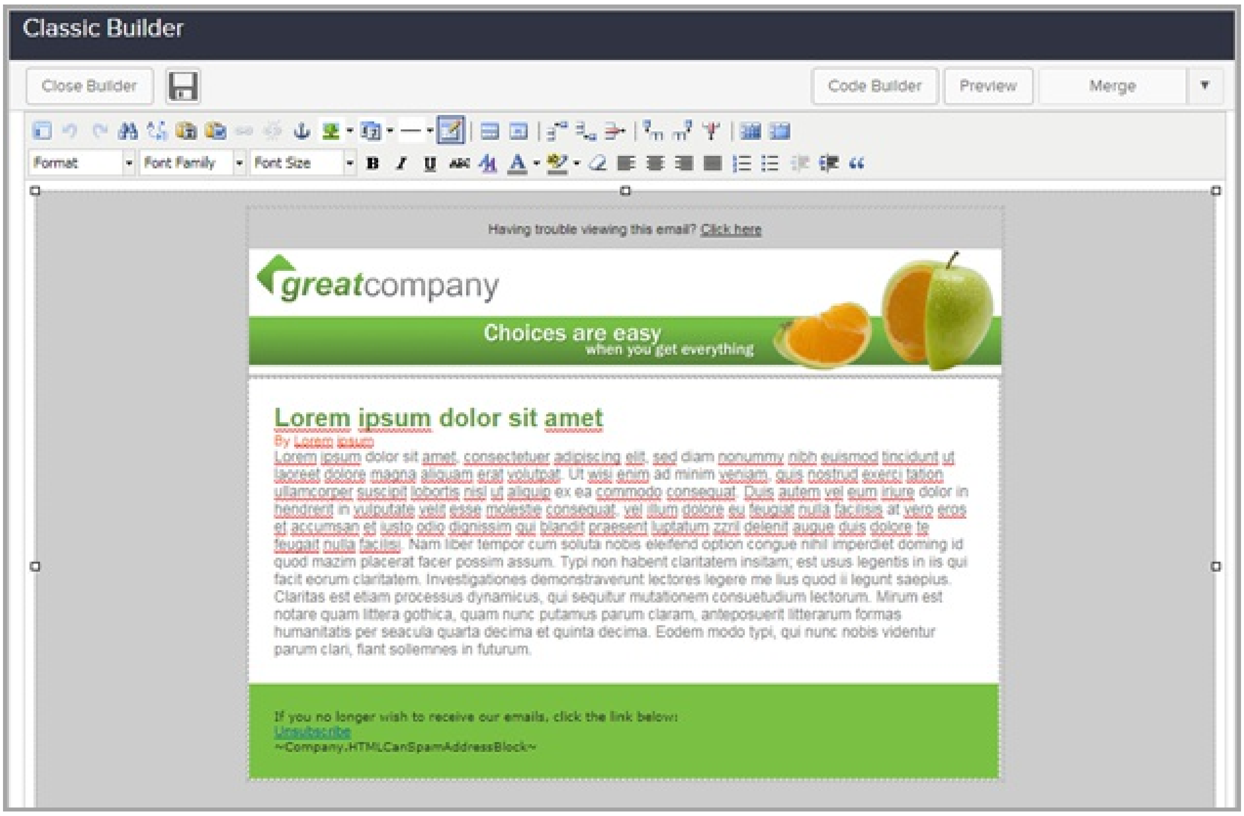
(Legacy) Email Code Builder

As an alternative to the standard HTML option, users can build an email from HTML source code using the Code Builder. The code is generated through an HTML code editor (e.g. Dreamweaver) and then pasted into an Infusionsoft email. Users who want highly customized emails and who are very familiar with HTML code may prefer this HTML option for it's additional flexibility. The code option is not compatible with the standard HTML builder. Once an email is converted to code, it can no longer be edited using the drag & drop interface.



(Legacy) Classic Builder

The classic builder is an older email builder. It uses a standard HTML WYSIWYG editor which includes tools to insert tables and more. Because this builder will eventually be phased out, we recommend using the drag & drop or code HTML builder instead.


Classic Builder
Close Builder
Code Builder
Preview
Merge
Format
Font Family
Font Size
Having trouble viewing this email? Click here
greatcompany
Choices are easy
when you get everything
Lorem ipsum dolor sit amet
By Lorem ipsum
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta nobis eleifend option congue nihil imperdiet doming id quod mazim placerat facer possim assum. Typi non habent claritatem insitam; est usus legentis in iis qui facit eorum claritatem. Investigationes demonstraverunt lectores legere me lius quod ii legunt saepius. Claritas est etiam processus dynamicus, qui sequitur mutationem consuetudium lectorum. Mirum est notare quam littera gothica, quam nunc putamus parum claram, anteposuerit litterarum formas humanitatis per seacula quarta decima et quinta decima. Eodem modo typi, qui nunc nobis videntur parum clari, fiant sollemnes in futurum.
If you no longer wish to receive our emails, click the link below:
Unsubscribe
~Company.HTMLCanSpamAddressBlock~

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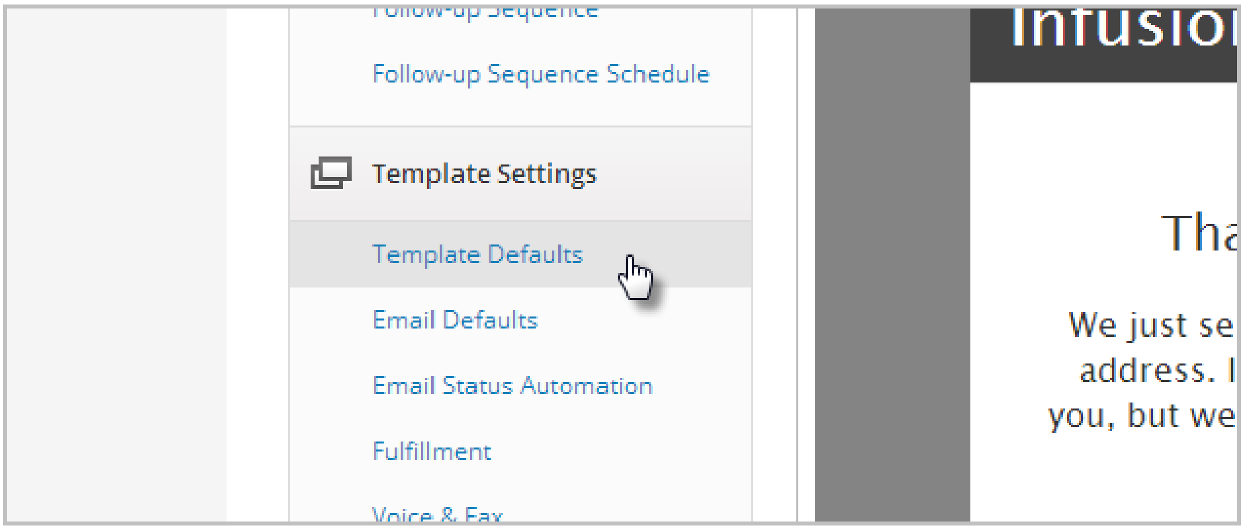
Organize Legacy Templates With Template Categories

Last Modified on 07/23/2018 11:34 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**.

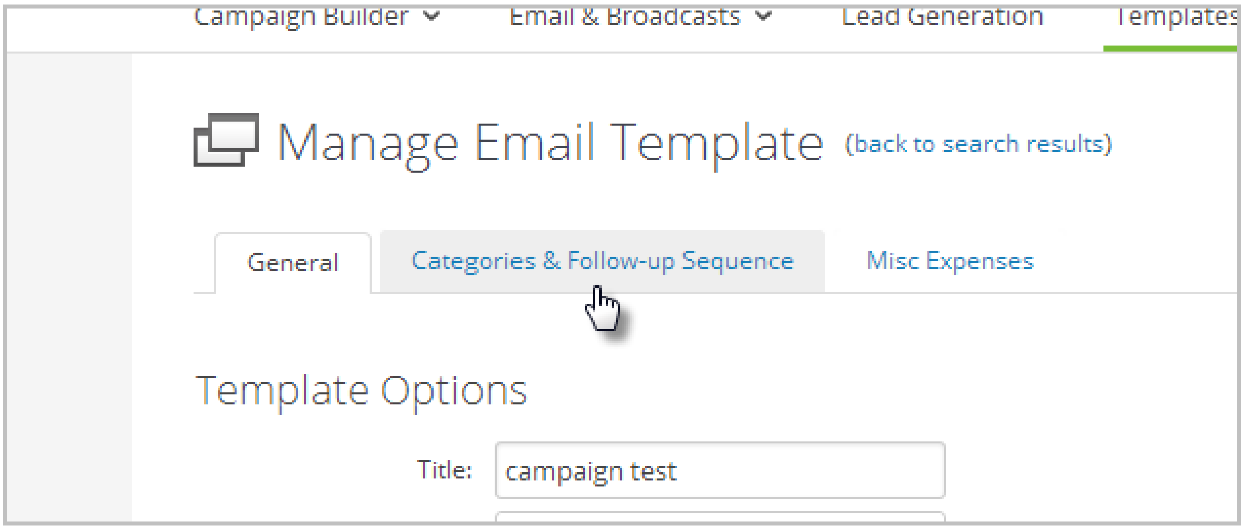
As you build your automated follow-up processes in Infusionsoft, the number of templates you create is going to grow. Use template categories to organize templates and to filter the template list.

1. Go to **Marketing** > **Settings** in the main navigation menu
2. Click on Template Defaults in the settings menu.

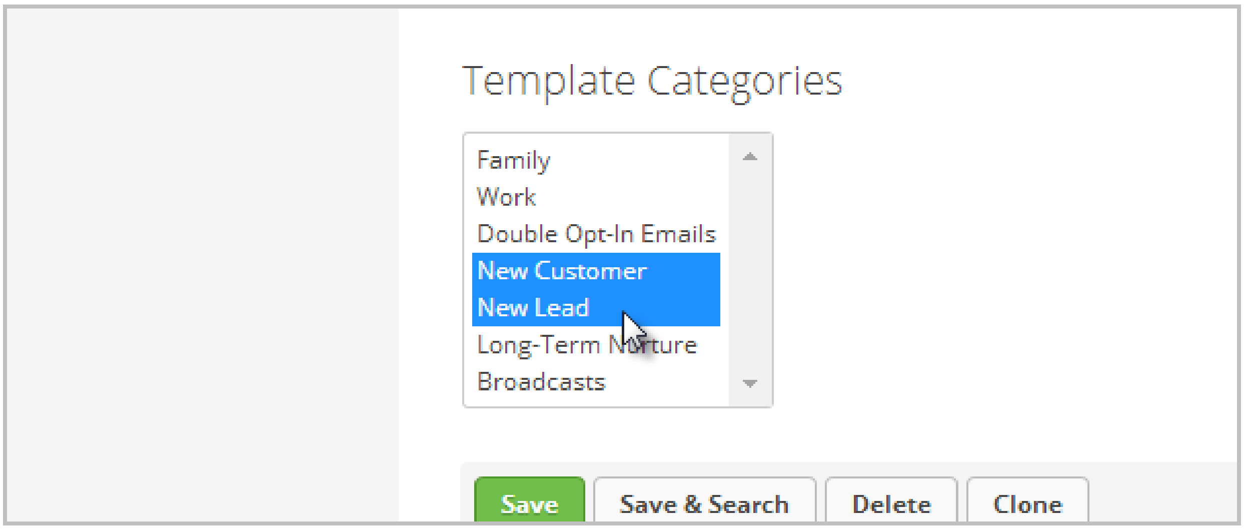


3. Infusionsoft has a set of default template categories. You can use these categories or create new categories.
    - Delete the categories you won't use by highlighting the text, and pressing delete on your keyboard. Remove the blank space on the list as well.
    - Add company-specific categories to the list. Type in one per line.

4. Click **Save** to apply any changes.
5. To assign a template to a category, go to **Marketing > Templates**
6. Click on a template name to open it.
7. Click on the **Category & Follow-Up Sequence** tab.



8. Select one or more category. Hold down the **CTRL** key on your keyboard to select more than one.



9. Click **Save** to update the template.
10. To filter the Template Library List by Category...
    1. Go to **Marketing > Templates**
    2. Select a category from the category drop-down.
11. The list of templates will update dynamically to show the templates that are assigned to

the category you selected.

Using a different version of Infusionsoft? Click Here to learn more

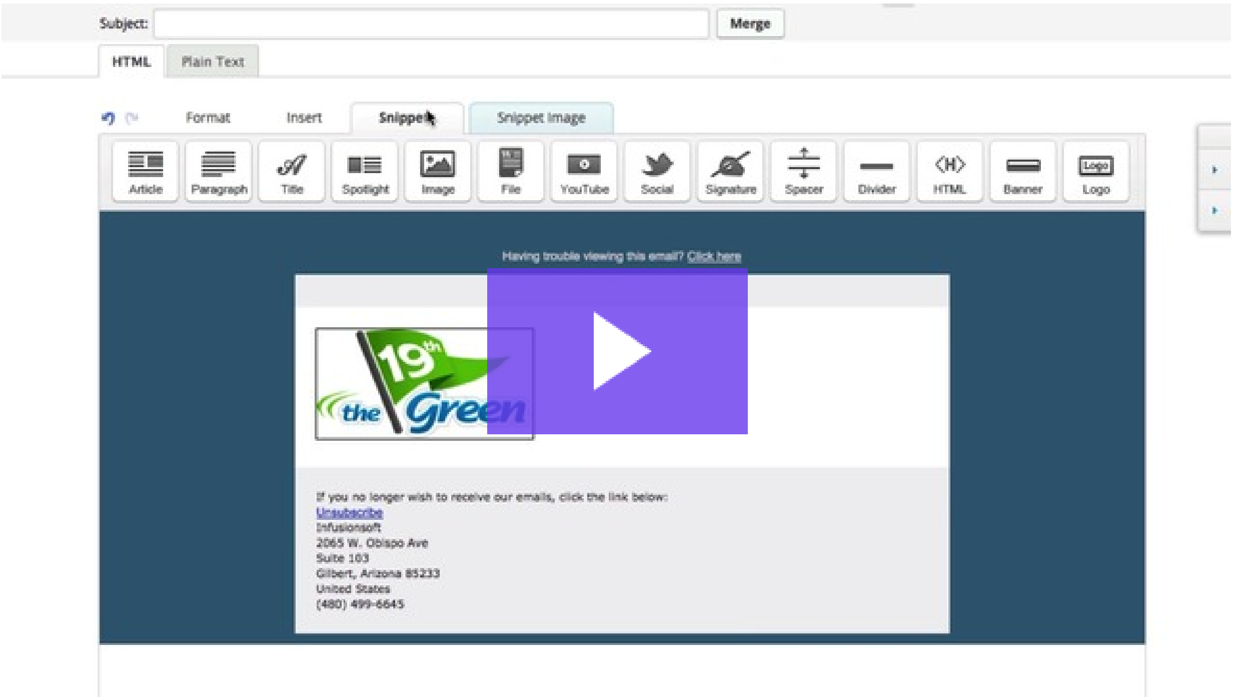
Create A Legacy Email Template

Last Modified on 07/23/2018 11:34 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**..

The drag & drop email builder makes it easy for anyone to create branded, professional looking emails. In order to ensure your emails have a consistent look and feel, you should start by creating your branded templates in the branding center first. After you've created your branded templates, all new emails you create will retain the same look and feel.

Compatibility Note: The drag & drop builder is not compatible with the code builder (or classic builder). If you create an email using the drag & drop builder, you should continue editing it with the drag & drop builder tools. If you convert an email to the code or classic builder, you will not be able to return to the drag & drop builder for future editing. Click here to learn more about legacy email builders



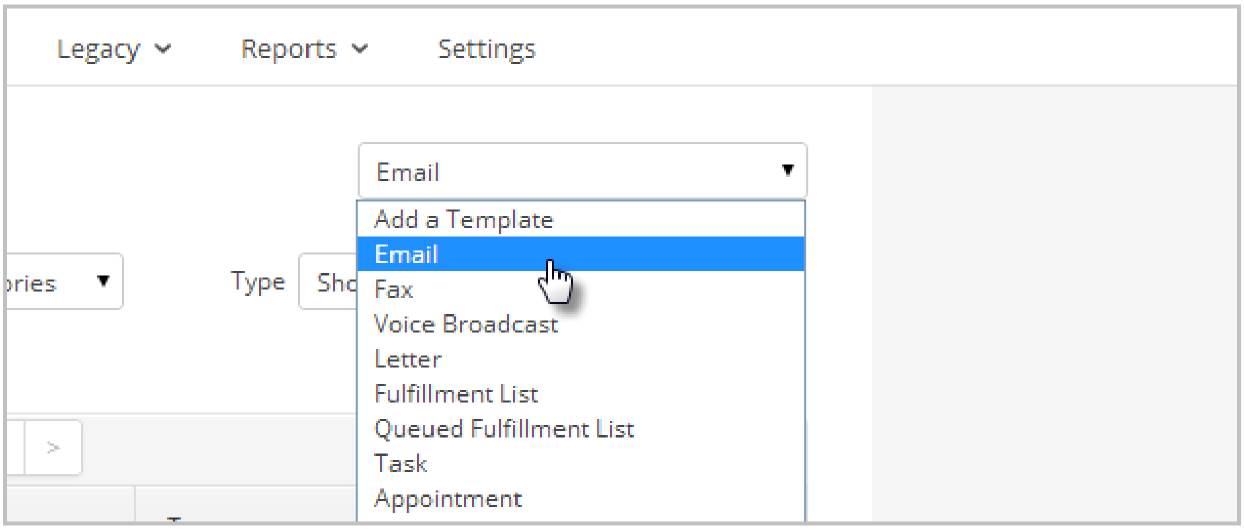
To get started, let's look at a couple of features that will help you design a great looking email...

- Snippets: Use the drag & drop snippets to construct the email body and move them around to adjust the way the content is organized.
- Layout: The layout tools allow you to display or hide sections to customize the way the content is organized in the email. The Layout & Style menu contains the following tools:
  - Pre Header: This section appears before the email content. It generally contains a link to view the hosted version of the email or a double opt-in / opt-out message.
  - Header / Footer: These sections appear above and below the email body. They span the width of the entire email. The header generally contains a banner image. The footer generally contains the CAN SPAM address and opt-out or update links.
  - Sidebar: Turning on the sidebar adds a second column to the email. The sidebar can be positioned to the left or the right of the email content. You can also adjust the sidebar width.
  - Email Width: The default email width is 600 pixels for optimal viewing in the preview panes of all email clients. Use this layout tool to change the default.
  - Email Alignment: Emails are aligned center by default. Use this layout setting to align it left if you want to mimic the layout of common email clients (e.g. Outlook)
  - Show Form: This setting integrates with social sharing to turn a hosted email into a mini landing page with a form when viewed through a socially shared link (read related article.)
- Style: There are several standard styles available in the drag & drop email builder. You can use one of the built-in styles "as is" or use it as a starting point for creating a custom style. You can customize the colors used in various parts of the email using hexadecimal color codes, an eye-drop color picker tool, or use the built-in "Guess" feature (which

suggests colors based on an image within the email, like a logo). The "Simple" style removes custom formatting to mimic an email sent through common email clients (e.g. Outlook)

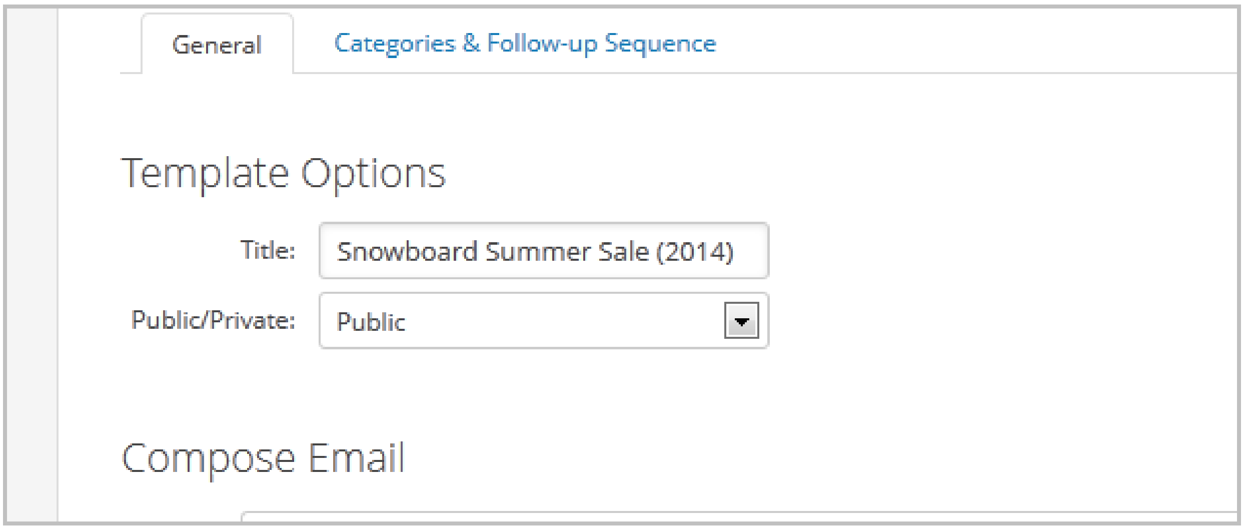
1. Go to **Marketing** > **Templates**

2. Select **Email** from the Add a template drop-down.



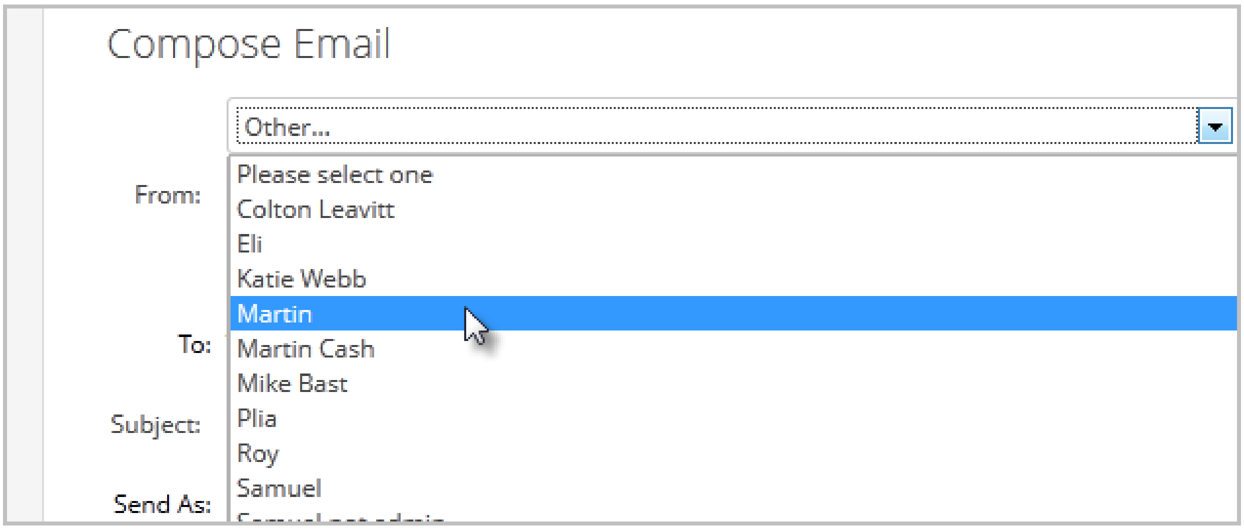
Template Draft: Whenever Infusionsoft detects a previously unsaved template, you will see this dialog. You can continue from a previous template, or simply click No, start from scratch.

3. Enter a Title



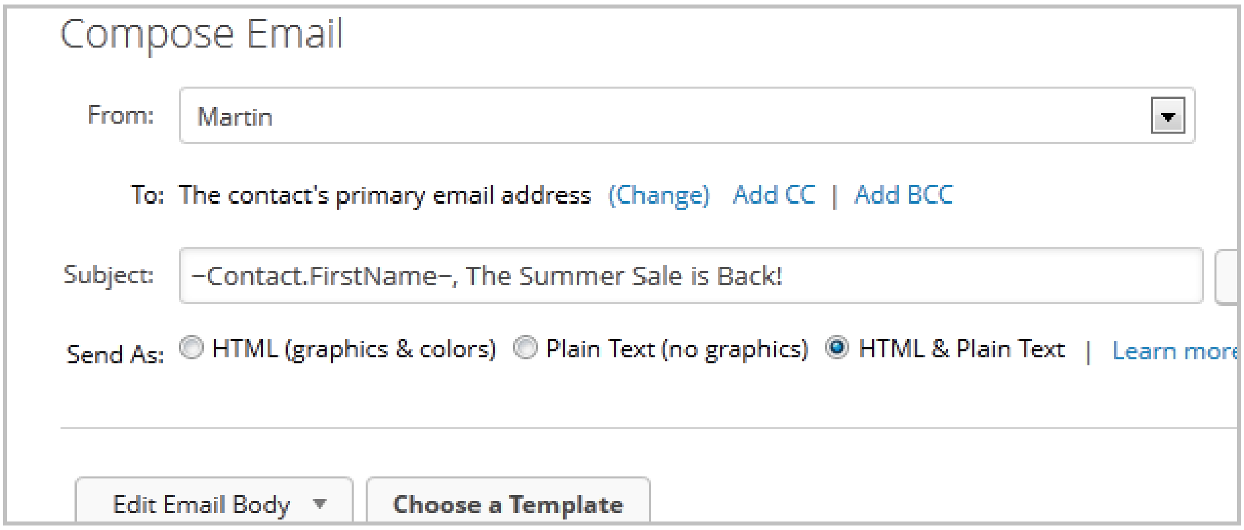
You will only see the title from within Infusionsoft. Title your templates in a way that will allow you to search and find them easily. Public/Private - If you set this to Private, only the user that created the email can access it.

4. Choose the From information



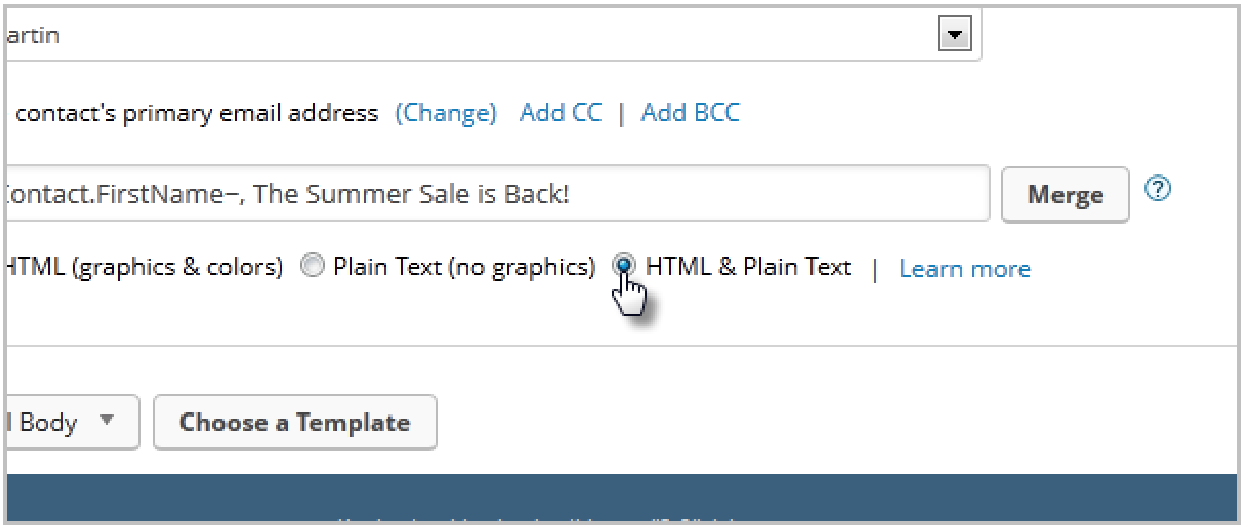
You can choose to send the email address from the contact's owner (most common), a specific user, or choose other to manually type the from name and email address.

5. Enter the email subject



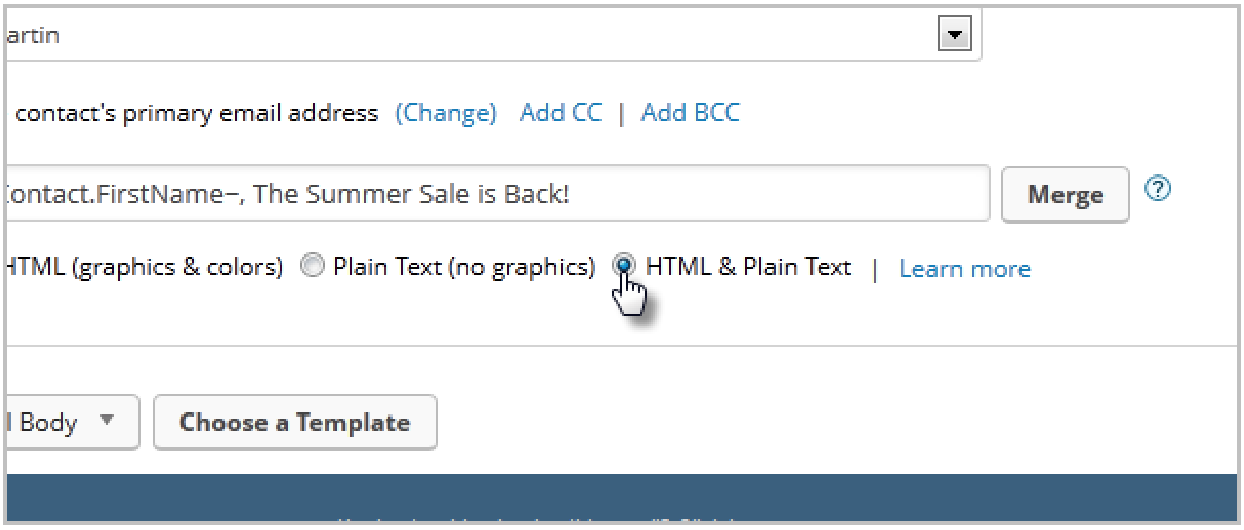
You can merge contact information into the subject line if you wish to personalize it. Just click inside the subject line where you would like to place the merge field, then click the merge button to choose the field you would like to merge.

6. Select the type of email you want to send



- **HTML (Graphics & Colors):** Uses only the drag & drop builder to create the email.
- **HTML and Plain Text:** After you create the drag & drop version of the email, you will need to copy the message to the plain text builder. You will essentially be creating two versions of the same message.

7. Click on the **Edit Email Body** button.



8. Click on the **Snippets** tab at the top of the email builder.

9. Drag a banner snippet to the top of the email. If a banner is already there, you can change the image by double-clicking it and selecting a custom image from the drop-down or adding a new image. Note: Custom email banners should be no more than 600 pixels wide.

10. (Optional) Click on the Format tab and click the Layout & Style button to change the default one-column layout. You can add a sidebar, adjust the width, and turn on / off the pre-header, header, and footer. The updates take place immediately so you can review them as you work.

11. (Optional) While in the Layout & Style menu, click on Style to choose the colors used in the various parts of your email.
    - Click on one of the standard styles to use it without modification.
    - Click on Edit beside a standard style to use it as a starting point for your custom style. You can customize the colors using:
        - Hexadecimal color codes
        - The color picker tool (can pick colors from any image in your email)
        - Guess: Click on an image and then on Guess. Infusionsoft will analyze the colors in the image and suggest a style each time you click on Guess.
12. Click on the Snippets tab again and drag them onto the email to add text, images, social media links, and more. Customize the content in the paragraph, article, and spotlight snippets and select or upload images.
13. Add automation links to text and images. Just highlight the text or click on the image you want to link and click the Link button on the toolbar. Note: You can only link the images in paragraph or article snippets.
14. Enter the address you would like to link to.
15. Select the **Action** from the drop-down (e.g. Apply / Remove Tag). Repeat as needed.
16. Click on the **Save** icon to save your changes.
17. Then click on the **Preview** button to review the email.
18. Click on the **Close Builder** button when you are finished customizing the template.
19. If you chose HTML & Plain Text you will need to copy the body of the email into the text box labeled, Plain Text Editor.
20. Check the Spam Score by clicking on the Update Score button. If the spam score is over 5, modify your email to reduce it. Emails scoring over 5 are more likely to go to the recipients' junk-mail folder (see related article.)
21. Mark the template as **Ready** and then click on the **Save** button to apply the updates to the template.
22. Click on the **Save & Send Test** button to send yourself a copy.

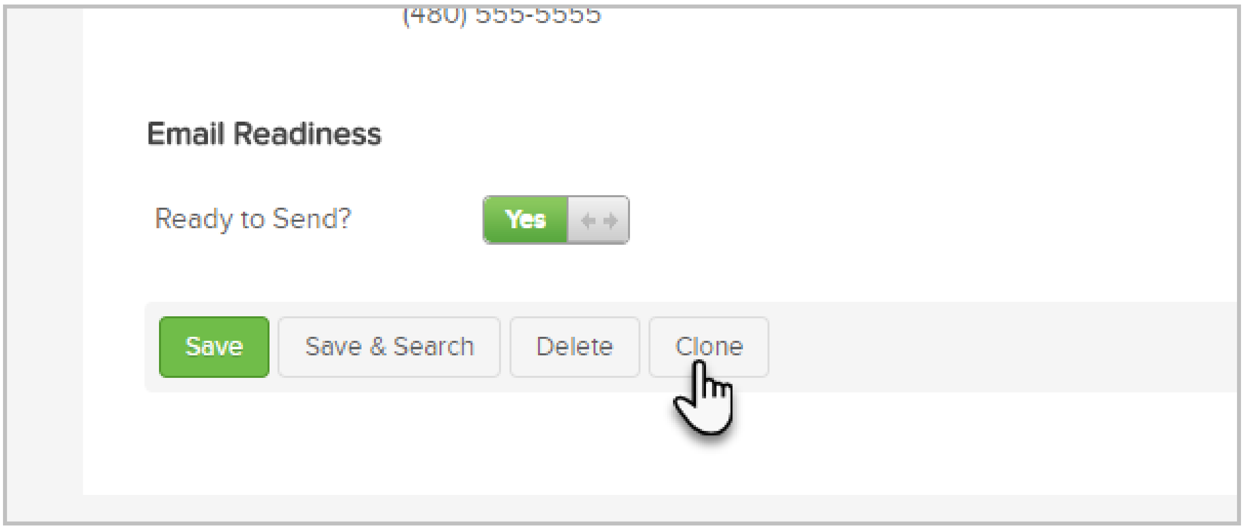
Using a different version of Infusionsoft? Click Here to learn more

Clone A Legacy Email Template

Last Modified on 07/23/2018 11:35 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**.

1. Go to **Marketing > Templates**
2. Click on the name of an existing email template to open it.
3. Scroll to the bottom and click on the **Clone** button. A confirmation message, "Template Cloned Successfully" will appear at the top of the template.



4. Change the name of the email template.
5. Mark the template as **Ready** and Save it.

Using a different version of Infusionsoft? Click Here to learn more

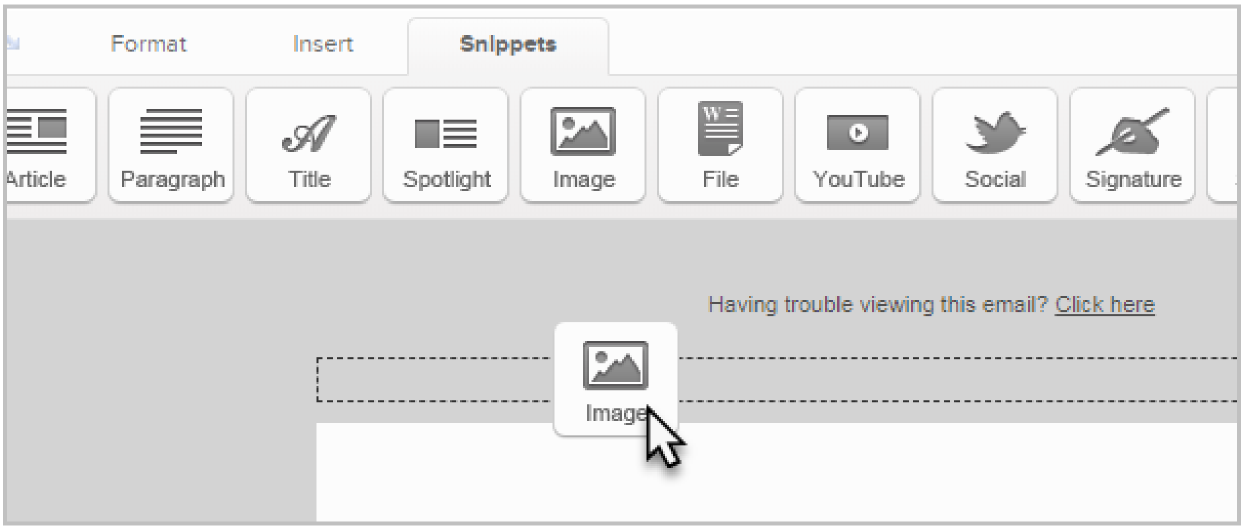
Add Images to a Legacy Email

Last Modified on 07/23/2018 11:35 am MST

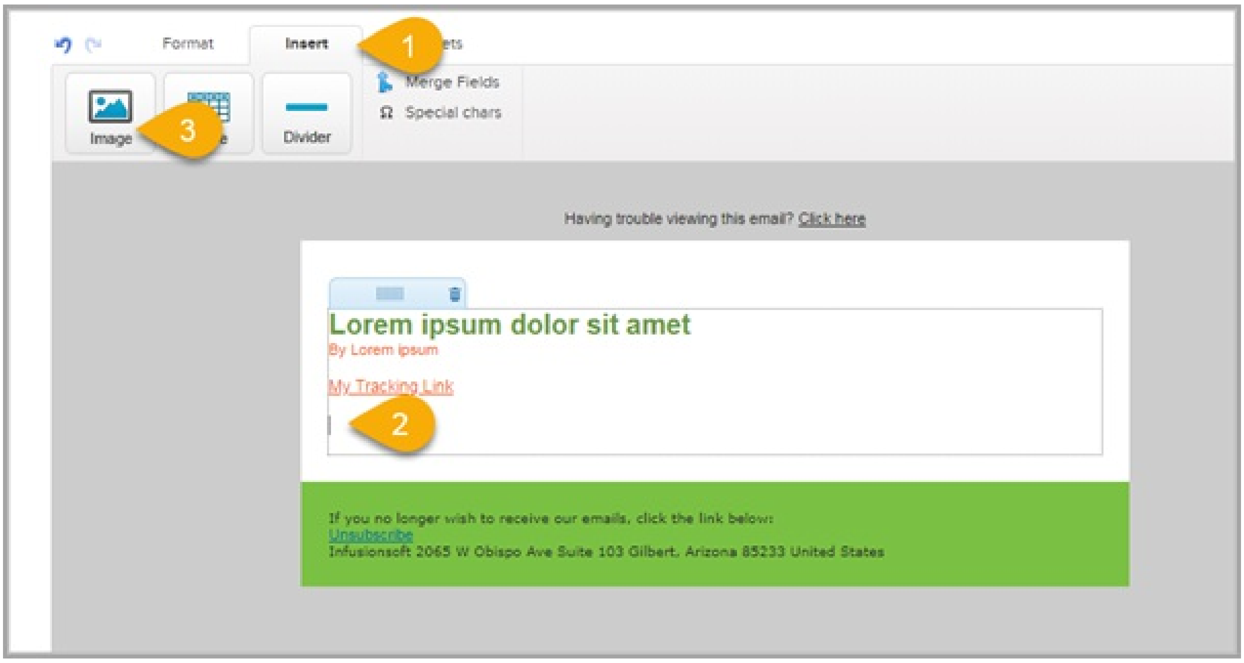
Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**.

When you create an email template through the drag & drop builder, you can add images using snippets or just insert an image into an existing paragraph, article, or spotlight snippet.

1. To insert an image snippet, click on the **Snippets** tab and drag the image object onto the builder canvas and drop it in place.



2. To insert an image into an existing paragraph, article, or spotlight snippet, just click inside the snippet where you would like to insert an image and then click on the **Image** button.



3. Pick an image from the image drop-down, or click on **Add new image** to upload a new image. Browse your computer files to select an image, and then click on Upload to save it in Infusionsoft. Once an image is uploaded, it is added to the alphabetized image list. It will already be selected by default.

4. Enter the Image Settings.

    - **Alt Text**: This text is displayed when the image is blocked by an email client (e.g. Outlook). Enter your company name or other text related to your company and/or the image.
    - **Alignment**: This aligns the text below the image with the image you are inserting. It determines how the text wraps around the image. If you are using an image snippet instead of a text snippet, you can skip this step.
    - **Manually resize this images:** Check this box to manually change the dimensions of the image so that it fits better in the email space. Make sure you resize the width and height proportionately, dividing each dimension by the same number.

5. Click on the **Insert / Update** button to add the image to the email.

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Personalize Legacy Email Templates With Merge Fields

Last Modified on 07/23/2018 11:35 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**.

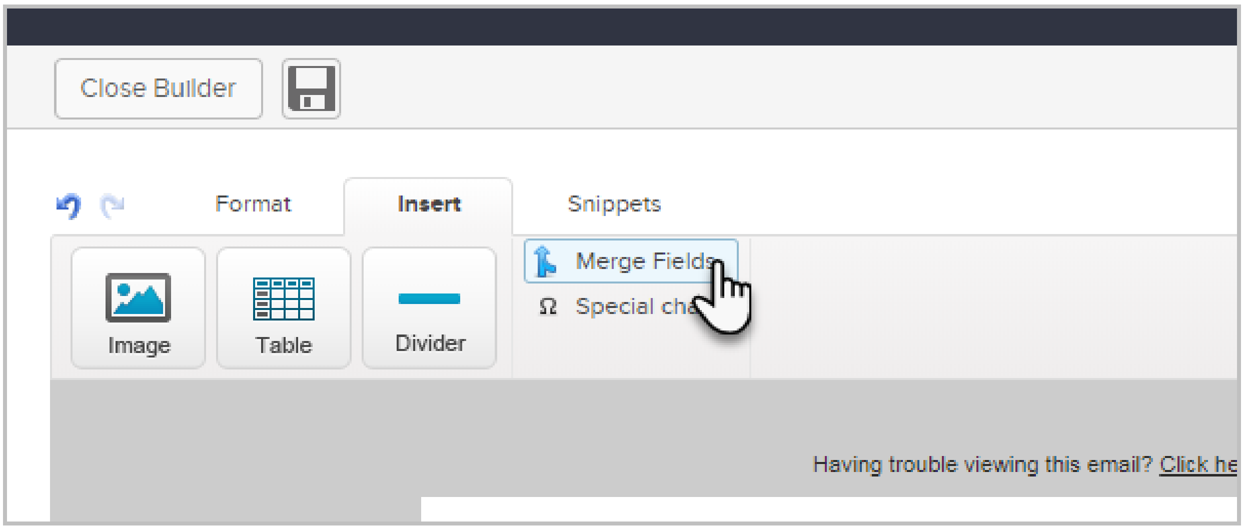
Merge Fields are used as placeholders in an email for content that will be personalized for each recipient. The merge fields pull information from individual contact records or from the Merge Field Defaults (when the field in the Person Record is blank). In the example below, the Merge Fields are replaced with a person's first name, their appointment date, and the signature of the User who sent the email from Infusionsoft.

Example:

> Dear ~Contact.FirstName~
>
> Thank you for speaking with me today. I'm glad I had a chance to learn more about your needs and interests. I look forward to our in person appointment, which I have scheduled for ~Contact._ScheduledAppt~. Please let me know if you have any questions before we meet.
>
> Best Regards,
>
> ~LoggedInUser. HTML Signature~

1. Go to the email template you want to personalize in the template library (**Marketing > Templates**)
2. Click on the **Insert** tab
3. Click on the **Merge** button to open the merge fields. The first list shows merge field

categories. Click on a category name to view the merge fields available.



4. After you open the merge field list, click into the email body, subject line, or To/From email address fields to select a position for the merge field, then click on the merge field name (e.g. First Name) to insert it in the email.

5. The Merge Field should now be inserted into the email wherever you placed your cursor.

6. Repeat this process to add more merge fields.

7. Save your changes, close the builder, and then save the template as well.

Add an Attachment to a Legacy Email

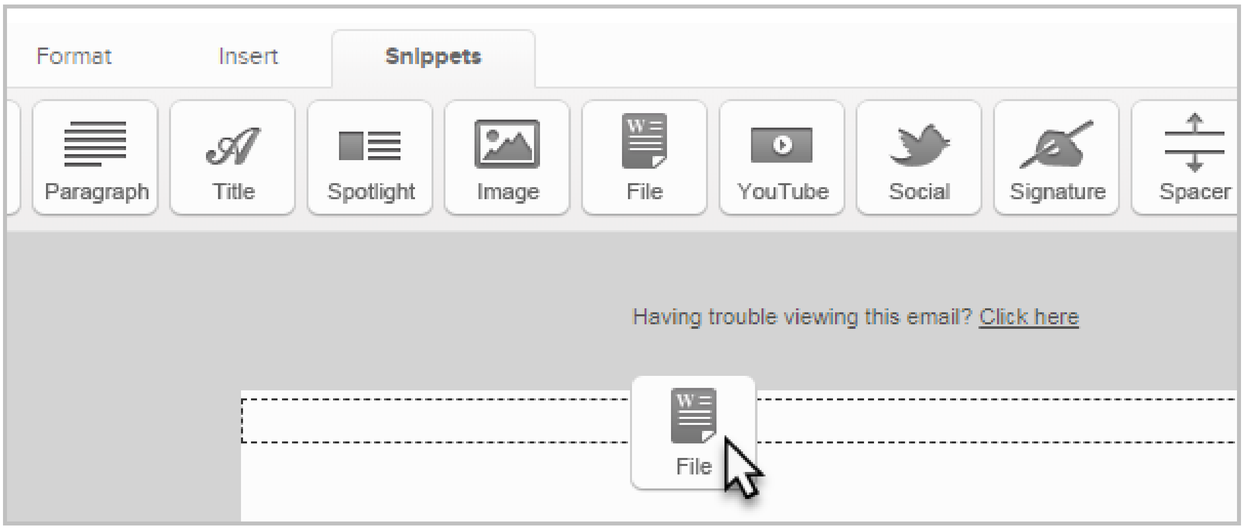
Last Modified on 07/23/2018 11:36 am MST

Add an Attachment to a Legacy Drag & Drop Email

1. Go to **Marketing** > **Templates** to select an email template or to **Marketing** > **Campaign Builder** to edit a legacy email in a campaign sequence.

2. Open the email to view and edit it.

3. Click on the file snippet to drag and drop it onto the email body.



4. Click the **Add New File** button, or select an existing file from your Company File Box. The files you upload using the attachment snippet are public files that your email readers can view.

5. Click **Save**

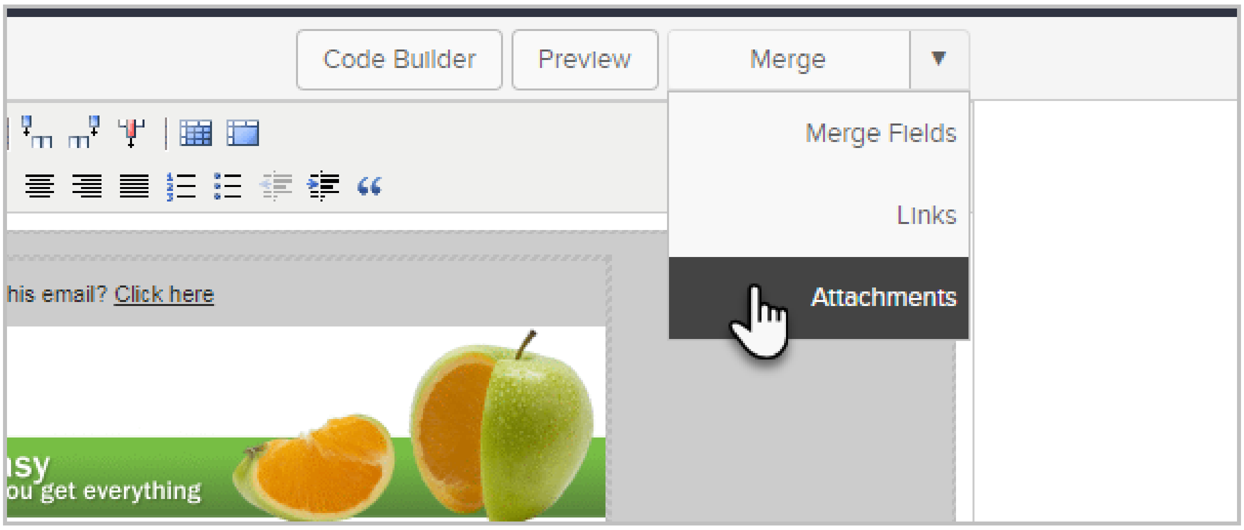
Add a Hosted Attachment to a Code, Plain Text or Classic Email

1. Go to **Marketing** > **Templates** to select an email template or to **Marketing** > **Campaign Builder** to edit a legacy email in a campaign sequence.

2. Open the email to view and edit it.

3. Click inside the body of the email where you would like to link the attachment

4. Click the arrow on the Merge button and select **Attachments** from the drop-down.



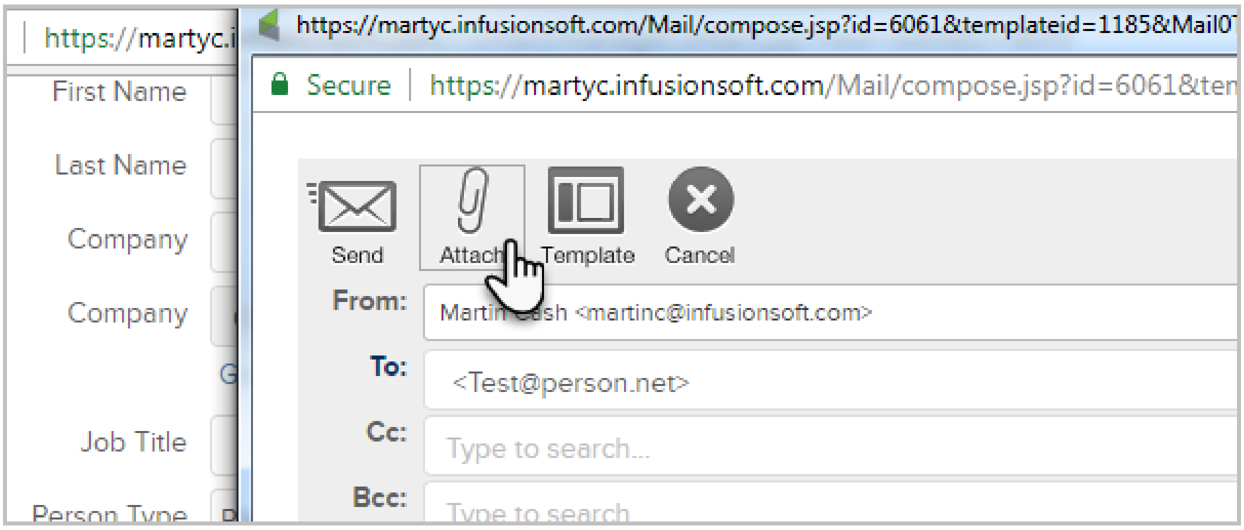
5. Upload a new file, or click on the name of the file you would like to attach.

6. Click on the name of the file to insert it into the email as a merge field (~HostedAttachment_751~.)

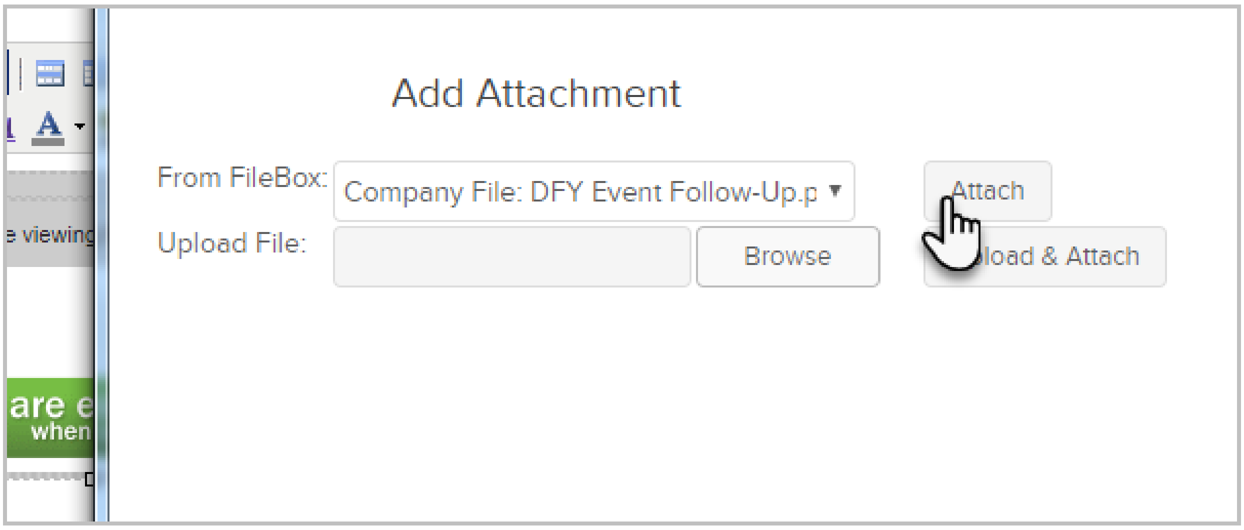
To Add an Attachment to a One-Off Email

Note: Attachments added with this method are removed when emails are sent via broadcast.

1. Click on the **Attachments** button



2. Select an existing attachment from a drop-down, or click on **Browse** to add a new attachment.



3. Click **Attach**

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Insert YouTube Content Into Legacy Emails

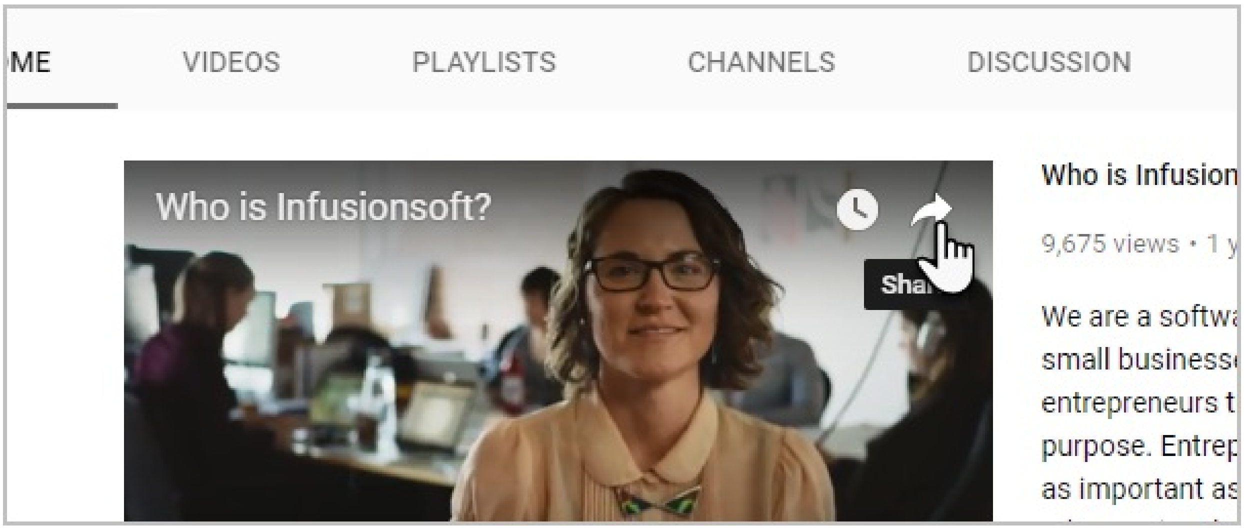
Last Modified on 07/23/2018 11:37 am MST

You can integrate video with your Infusionsoft email and landing page marketing efforts through the YouTube Snippet. This snippet can be added to Drag & Drop Emails or Web Forms to increase open rates and encourage social sharing. The email YouTube Snippet is an automation link and campaign goal method . When you use the YouTube Snippet on a landing page or web form, the video will play right in the hosted web form page. Use the YouTube Snippet in conjunction with the Social Snippet and Infusionsoft's social publishing options expand the reach of your video content.

1. Drag the **YouTube** snippet into position in a drag & drop email template, web form, or landing page.

2. Go to YouTube to view the video you want to embed.

3. Go to the bottom of the video and click on**Share** to view the URL for the video.



4. Copy the URL and paste it into the video ID field in the YouTube snippet in Infusionsoft, then delete the first part of it (http://youtu.be/), leaving only the ID. The ID is the highlighted portion in this example: http://youtu.be/VbHfebDNC1U

5. Click **Save** to add the snippet. You will see a thumbnail image of the video. Email

recipients will click on the video image to go to YouTube to watch the video, but visitors to your hosted web forms and landing pages will be able to play the video right away.

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Create A Legacy Plain Text Email Template

Last Modified on 07/23/2018 11:37 am MST

When you create a legacy email template in the template library, you can choose to create a Plain Text only email or an HTML & Plain Text email. You are able to copy / paste an HTML email message into the Plain Text editor, but will need to make some adjustments to ensure all links and merge field s are functioning properly. Note that pure, plain text emails are not available in the campaign builder. And, plain text emails cannot be tracked for open rates.

1. Go to **Marketing** > **Templates**
2. Select **Email** as the template type.
3. Enter the template Title, the From Email Address, and the Subject Line.
4. Choose the **Plain Text** (no graphics) option to use the plain text editor to create the message.
5. Scroll down to the plain text editor to type or paste in the email message.
6. Click on **Merge** to customize merge fields and merge links.

   Signature Merge Field
   Be sure you use the proper signature merge field. You want the plain text signature merge field, ~LoggedInUser.Signature~ or ~Owner.Signature~, NOT the HTML signature merge fields (~LoggedInUser.HTMLSignature~ or ~Owner.HTMLSignature~.)

7. Mark the template as Ready and click the Save button.
8. Click on the Save & Send Test button to send yourself a copy of the email you just created.

Note: If you are sending both HTML & Plain Text, you may need to temporarily set the Type to Plain Text to test the Plain Text version of your email.

Create A Legacy Email Template With HTML

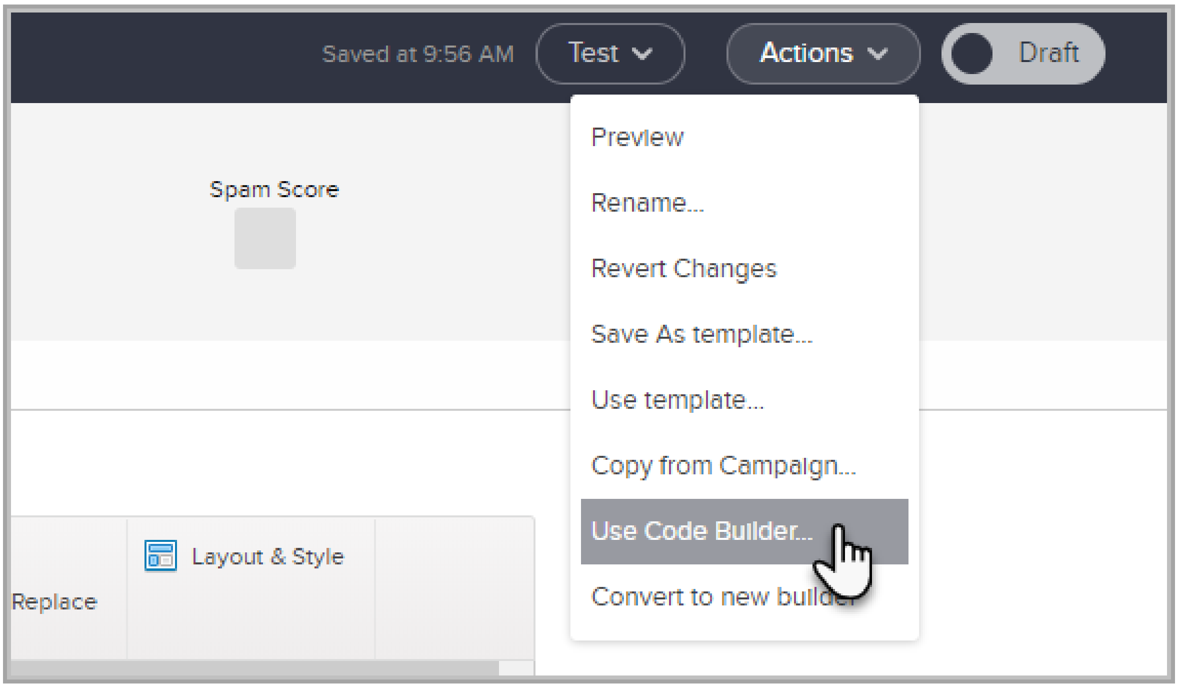
Last Modified on 07/23/2018 11:37 am MST

Be Careful! Campaign emails integrate closely with the link goals and campaign tracking. We recommend you use the standard Email Builder. If you must create campaign emails using the code editor, please consider the following.

- The system automatically creates a CSS class (e.g. class="inf-track-55") for all of the links in the code email as soon as you navigate away from an email object.
- If you are copying / pasting code form an outside email editor (e.g. Dreamweaver), navigate away from the email, and then double-click on it to return and copy the updated code (with the updated CSS). Paste the revised code into Dreamweaver. Do not remove the class information. This class is an integral part of tracking when links are used to satisfy campaign goals. If you do not copy the class information and maintain it in the code, the system will auto-generate a new class each time you edit the email object, which will break the campaign.
- All of the links in campaign sequence emails are tracked automatically. If you prefer not to track some of the links, add class="inf-track-no" to the code.

1. Double-click on a legacy email object in the sequence to edit it.

2. Click on the **Actions** button and select, **Use Code Builder**. You'll see a warning that tells you that the code editor is not compatible with the standard drag & drop editor. You will not be able to restore the email to its previous state after using it. Click OK to confirm that you understand.



3. Paste your custom HTML code into the editor. The system auto-saves sequence emails every 30 seconds and when you exit the screen.

4. Don't forget to mark the Email as Ready so you can publish your changes.

5. Click on the Back to Sequence button. This process will auto-generate the link classes mentioned above. The first time you create a sequence email object using the code editor, double-click on the email template again to copy the revised code.

6. To use the Code Builder when creating an email broadcast, go to Marketing > Templates and open your email.

7. Click on Edit Email Body and select Use Code Builder.

8. Paste the HTML source code and click on the Save icon to apply the update.

9. Click on **Actions** > **Preview** button to review the HTML email.

10. When you are finished editing, click on the Close Builder button to return to the email template.

11. Mark the template as Ready and click Save.

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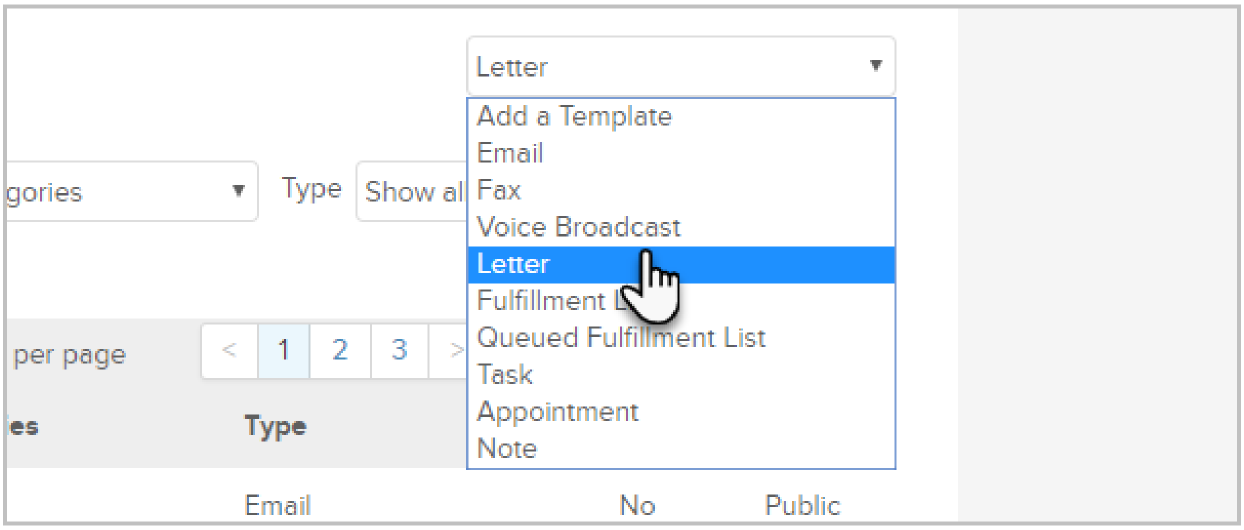
Create A Legacy Letter Template

Last Modified on 07/23/2018 11:38 am MST

A legacy letter template can be used to broadcast to a group of contacts, or from a single contact record. Infusionsoft will queue up a letter fulfillment job on the home page dashboard of the user the letter is assign to. When the letter job is processed, the system will auto-merge information from contact records in Microsoft Word® so you can quickly print the letter.

1. Go to **Marketing** > **Templates**

2. Select **Letter** as the template type.



3. Enter a Title for the letter template. Users will identify this template by the title. It should be short but descriptive.

4. Choose a privacy option.

    - Public: Choose this to make the template accessible to other Infusionsoft users.
    - Private: Choose this if you want to hide this template from other Infusionsoft users.

5. Click on the **Edit** tab to compose the letter. Compose the letter in Infusionsoft or paste content from Microsoft Word.

6. Click on the **Open Merge Window** button to access the merge fields you'll use to personalize the letter. Note: You must use Infusionsoft merge fields, even if you copy/paste from Word.

7. Click on a merge field category to access the merge fields.

8. Enter the processing information.

    - **Needs Labels:** Set to "yes" if you will print mailing labels for this letter.
    - **Assigned User**: Select the user who will be responsible for printing the Letter and Labels. This letter job will show up in the fulfillment jobs widget on their user home page.
    - **Notification**: Mark this check box to send the assigned user an email when the letter job is triggered.
    - **Notify Subject:** Enter the subject line for the notification email (e.g. New Customer Welcome Letter Job)
    - **Notify Body**: Enter more detailed processing instructions (e.g. hand address, print on company letterhead)

9. Click on the **Save** button to create the template.

10. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.

11. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and labor needed to process this letter for each person.

12. Mark the template as **Ready** and click on the **Save** button.

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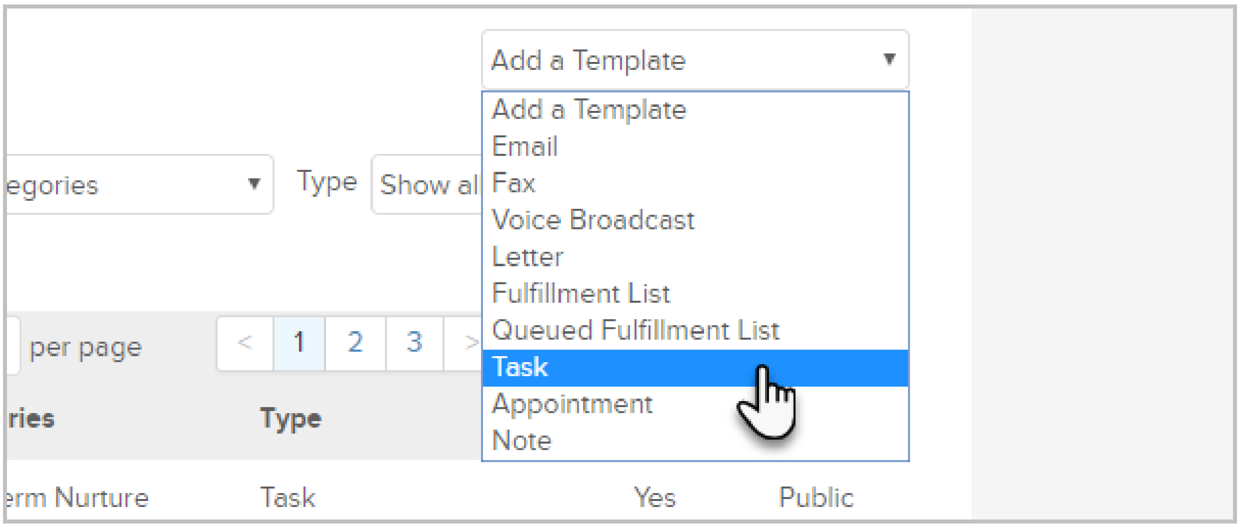
Create a Legacy Task Template

Last Modified on 07/23/2018 11:38 am MST

You can automatically assign tasks to users to incorporate personal touches in your follow-up strategy. When a task template is triggered through a legacy follow-up sequence or an action set, the system will automatically generate a task on the assigned user's task list. Task templates are only available for automated tasks; they are not available when a user manually creates task.

1. Go to **Marketing** > **Templates**
2. Select **Task** as the template type.



3. Enter a Title for the task template. The title is used to identify a task template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    - Public: Choose this to make the template accessible to other Infusionsoft users.
    - Private: Choose this if you want to hide this template from other Infusionsoft users.
5. Enter the Task Information.
    - **Type**: Select a task type from the drop-down (e.g. Call, Email). Note: You are able to

customize this list through CRM > Settings > Task/Appt/Note Settings.
  - **Title**: Enter the task title. This shows up in the assigned user's task list and will give them an "at a glance" summary of the task.
  - **Body**: Enter notes, a call script, or an outline into the body. This information will help the User complete the task more effectively. You can click on the Open Merge Window button to insert merge fields into the task body (e.g. ~Contact.FirstName~ or ~Contact.Phone1~)
  - **Assign to Contact's Owner**: Set to Yes if the user who is assigned as the contact owner is responsible for completing this task. Otherwise, set this to No.
  - **Assign to (backup)**: Select a user from the drop-down. This user will be assigned the task if "Assigned to Contact's Owner" is set to No OR if the contact has not been assigned an owner.
  - **(Optional) Days till Due**: This number defines the time window during which the task must be completed before it is considered overdue (e.g. a 5 would mean that a task triggered today would not be overdue unless it was not completed within the next 5 days.)
  - **(Optional) Due At**: Select a time of day, if appropriate.
  - **Priority**: Selecting a priority helps the user determine which tasks to address first in a given day. Select from Critical, Essential, or Non-Essential.
  - **(Optional) Pause Follow-Up Sequence Until Complete**: Set to **Yes** if this task is being used as a step in a follow-up sequence and you do not want any of the steps that follow it to trigger until the assigned user marks the task as complete.
  - (Optional) Notify these Users: Select users who need to know when this task is triggered. These users will receive an email notification.

6. Click on the **Save** button to create the task template.

7. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.

8. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This is not commonly used with task templates, but the cost can include both the materials and labor to fulfill this task for each person.

9. Mark the task template as **Ready** and click on the **Save** button to apply the changes. Note: Some tasks have several possible outcomes or scenarios that can change a prospect or customer's follow-up path. If a task can have multiple outcomes, you may need to create some task completion scenarios.

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Create A Legacy Appointment Template

Last Modified on 07/23/2018 11:39 am MST

Legacy Notice: This article refers to a legacy feature that is not compatible with the Campaign Builder.

You can automatically assign appointments to Infusionsoft users to incorporate personal touches into your follow-up strategy. When an appointment template is created through a legacy follow-up sequence or action set, the system will create a new appointment on the assigned user's calendar and in the appointment widget on their home page dashboard.

1. Go to **Marketing** > **Templates**
2. Select **Appointment** as the template type.
3. Enter a Title for the appointment template. Note: The title is used to identify an appointment template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    - Public: Choose this to make the template accessible to other Infusionsoft users.
    - Private: Choose this if you want to hide this template from other Infusionsoft users.
5. Enter the Appointment Information.
    - **Type**: Select a appointment type from the drop-down
    - **Title**: Enter the appointment title. This shows up on the assigned user's calendar and will give them "at a glance" information about the appointment.
    - **Body**: Enter notes into the body. This information will help the user complete the appointment more effectively. Click on the Open Merge Window button to insert merge fields into the appointment body (e.g. ~Contact.FirstName~ or ~Contact.Phone1~.)

- **Assign to Contact's Owner**: Set to Yes if the user who is assigned as the contact owner is responsible for completing this task. Otherwise, set this to No.
- **Assign to (backup)**: Select a user from the drop-down. This user will be assigned the task if "Assigned to Contact's Owner" is set to No OR if the contact has not been assigned an owner.
- **Which Date?**: Select a standard date (e.g. Birthday) or custom field date (e.g. consultation date) to use as a basis for scheduling the appointment. You will schedule the appointment a specific number of days before or after that date. You can also create a new custom contact field if needed.
- **Schedule the appointment**: The appointment is scheduled in relation to the date above. Here you set appointment a specified number of days before or after that date, choose the year, and set a specific time for the appointment.
- **How long will the appointment last?**: Enter the amount of time that needs blocked out on the assigned user's calendar.
- **(Optional) Notify these Users**: Select users who need to know when this appointment is created. They will receive a notification email.

6. Click on the **Save** button to create the appointment template.

7. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.

8. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This is not commonly used with appointment templates, but the cost can include both the materials and labor to fulfill this appointment for each person.

9. Mark the appointment template as **Ready** and click on the **Save** button to apply the updates.

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Create Attachment Download Link Instead Of Using File Snippet in a Legacy Email

Last Modified on 07/23/2018 11:39 am MST

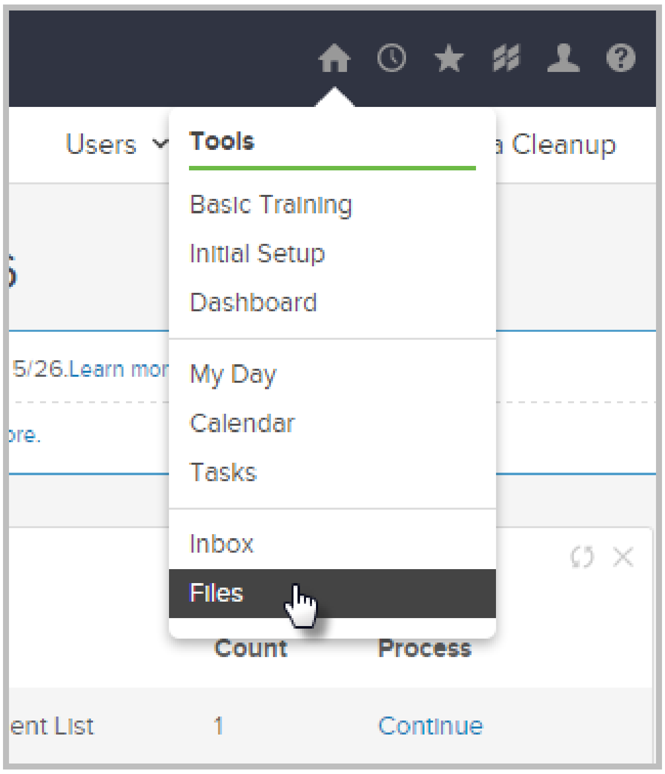
Legacy Notice: This article refers to the legacy email builder. Click here for new articles

Use case:

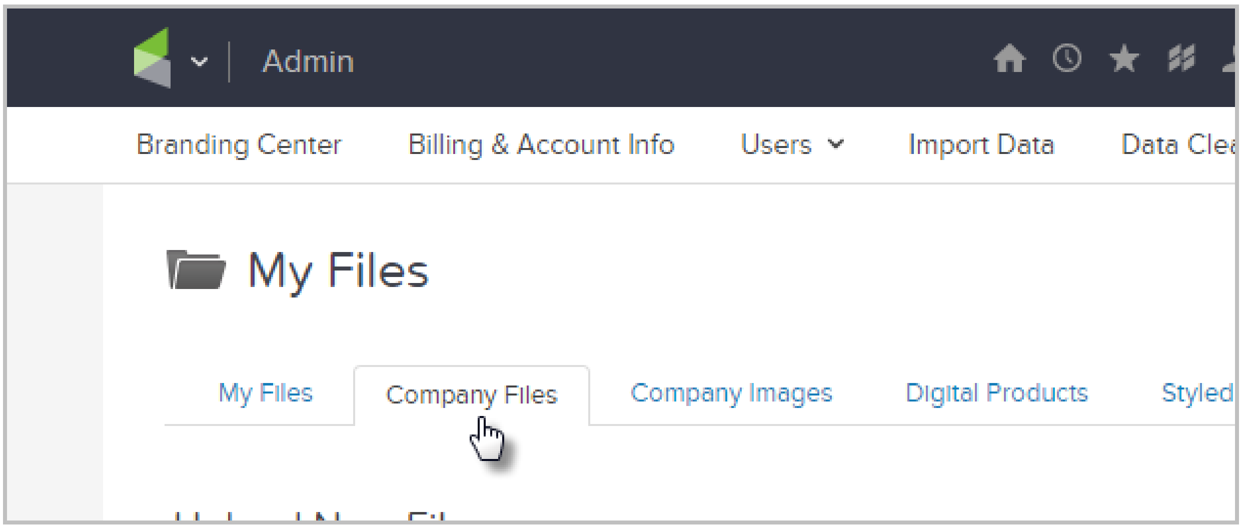
- If you are not using the new Email Builder when creating emails (which has this feature built-in)
- You want your recipient to click on a link or image to download a file.

Please Note! The file size limit is 10MB

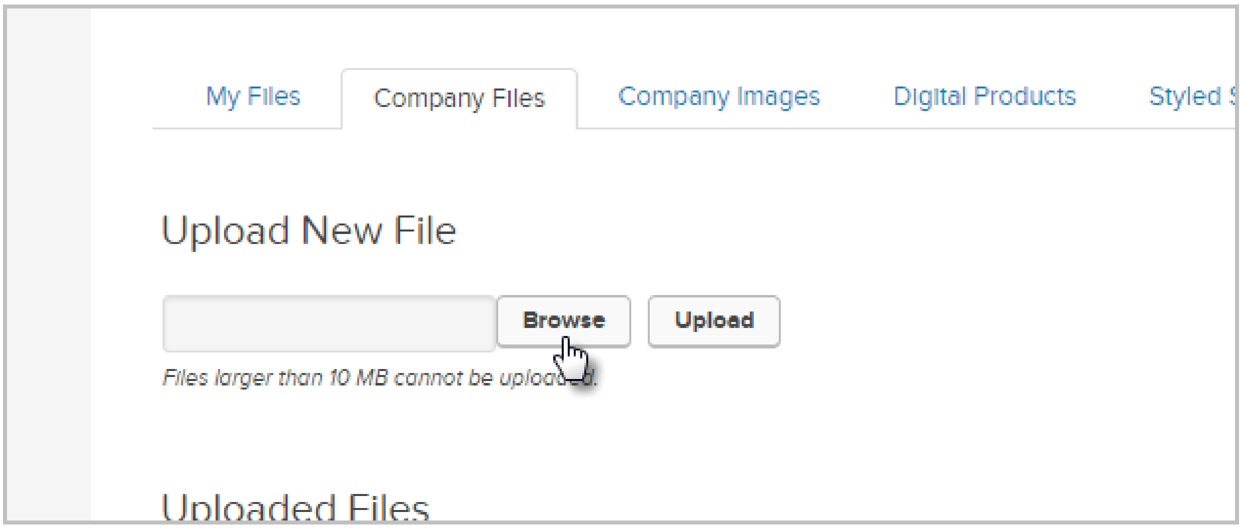
1. Navigate to Files from the toolbar



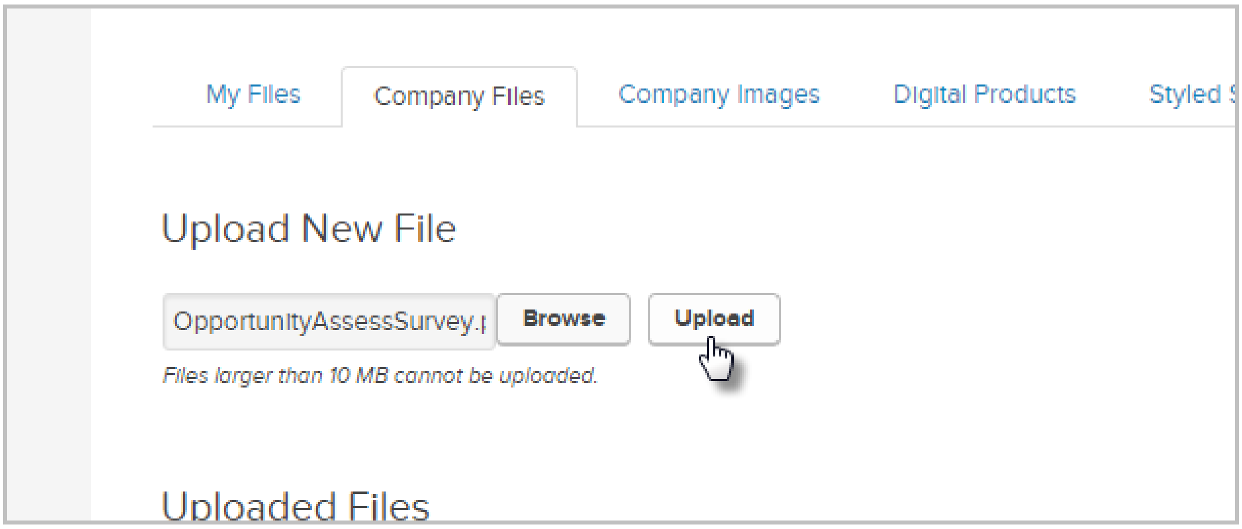
2. Click **Company Files** tab



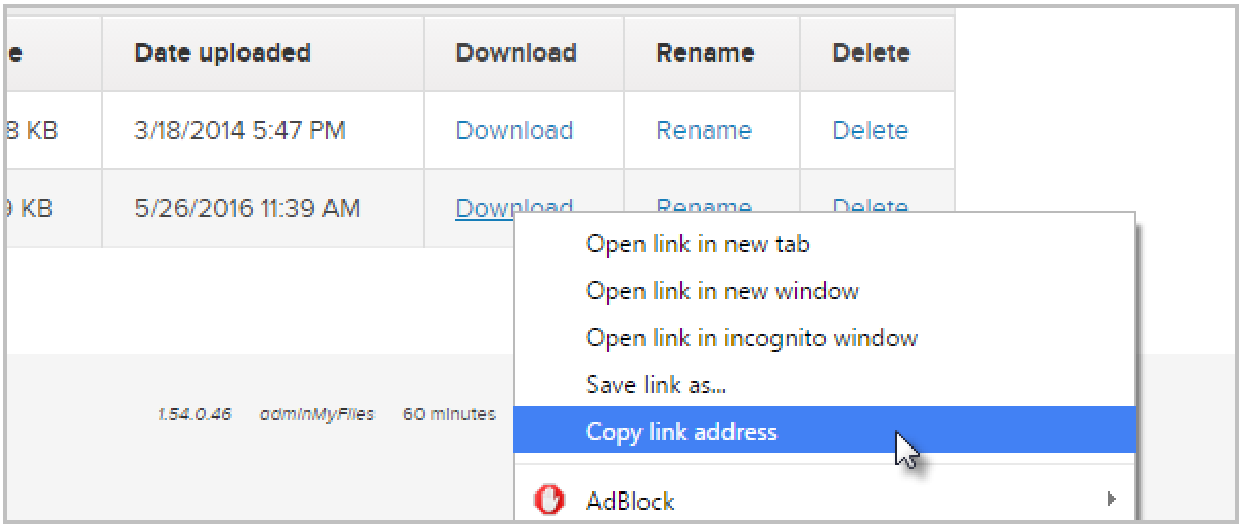
3. Click **Browse**, then select a file from your computer



4. Click **Upload**

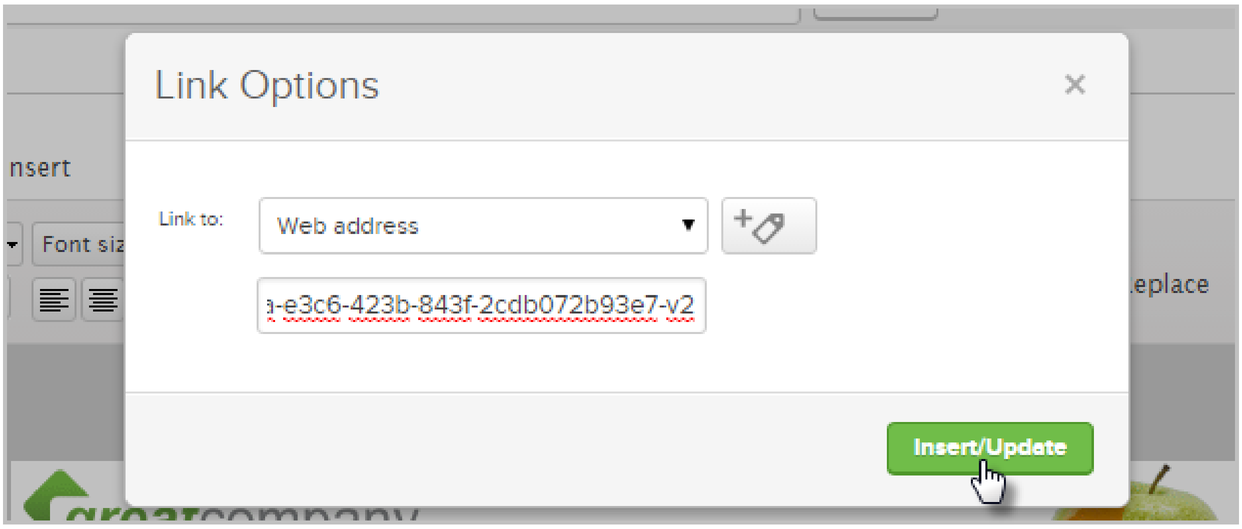


5. Copy Download link location. Right click the **Download** link next to the new file and select **Copy link address.** Note that your browser will likely be different than shown below, but you should have a "copy link" option.

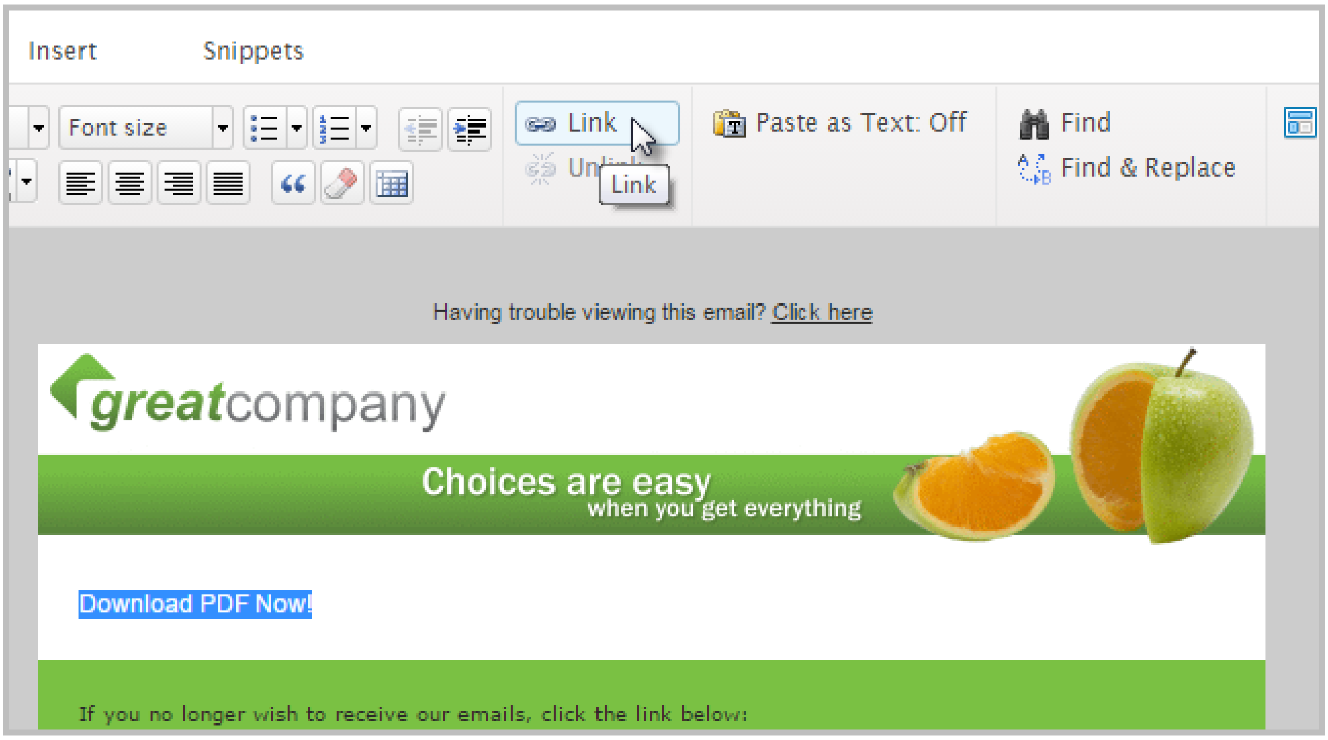


6. Navigate back to the email that you were creating

7. Create the link text. Paste in the link you copied earlier from the Filebox and click Insert/Update



Type the text for the link (e.g. "Click Here") then highlight this text and click the "Link" button in the editor.



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How To Convert Existing Emails To The New Email Builder

Last Modified on 07/23/2018 11:39 am MST

For long-time Infusionsoft users, the prospect of having new and updated features is both exciting and potentially daunting. Each new wrinkle brings the possibility of necessary changes to existing content in order to ensure its continued functionality.

One example of this is converting Legacy edition emails into messages that can be used in the new email builder. Not everything can be converted. Certain types like code builder emails will not translate, as well as HTML, file attachments, and email signatures.

Campaign Builder

Option 1: If the email is already saved in templates

1. Ensure that emails are saved under Marketing Templates
2. Open the campaign sequence you want to change
3. Drag over a new email object and open it
4. Click the **Actions** button
5. **Import the legacy** template
6. Select the template name
7. Once selected, choose **Convert Template**
8. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)
9. Set to **Ready**, and then **Publish**

Option 2: Steps for Legacy emails that are not to be saved as a template

1. Open the campaign that includes the legacy email
2. Open the email
3. Click the **Actions** button
4. Note: Save as a template for future use!
5. Click **Actions** again (The email will close if you save it as a template)

6. Select **Convert to New Builder**
7. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)
8. Set to **Ready**, then **Publish**

Broadcast Email

1. Go to **Marketing** > **Email & Broadcasts**
2. Click **Get Started**
3. Click **Actions**
4. Select **Import Legacy Templates**
5. Select the desired template name
6. Click **Convert Template**
7. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)

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Dynamic Lead Nurture Campaign

Last Modified on 09/04/2018 11:01 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Dynamic Lead Nurture campaign that you can install for free from the Infusionsoft Marketplace.

1. Install the Dynamic Lead Nurture campaign from its Marketplace listing

2. Add Educational Resources to Emails

   The email design and layout are pre-defined upon install. All you have to do is put the specific educational resources in the two emails and write brief descriptions.

   1. Double click the Dynamic Lead Nurture sequence
   2. Double click the Dynamic Lead Nurture #1 email
   3. Edit the email content so it is linking to two different educational resources and provides some context into why a lead might need this resource
   4. In the upper right of the page, click on Draft to mark the email as Ready; in the upper left of the page click Back to Sequence
   5. Repeat steps 2 through 4 for Dynamic Lead Nurture #2 email
   6. In the upper right of the page, click on Draft to mark the sequence as Ready; in the upper left of the page click Back to Campaign

3. Double Check Link Click Goals

   Out of the box, this campaign is automatically tracking the resource links in the nurture emails. However, now that you've edited the emails, you want to double check that all links are still being tracked.

   1. Double click the View Resource 1 link click goal

2. Going down the list of emails on the left of the page, click every link to the first resource in both emails; you'll know you did it right when the link has a green check which means the system will be looking for clicks on that specific link.
3. In the upper left of the page, click Back to Campaign
4. Repeat steps 1 to 3 for the View Resource 2 link click goal; make sure you are tracking the second resource's links this time around.

4. Assign the Follow Up Task

   The last setup step is to choose who gets the follow-up task when someone requests a conversation.

   1. Double click on the Task to Follow Up sequence
   2. Double click on the Task to Follow Up task
   3. Select a user from the Assign to (backup) drop-down
   4. In the Notify these users section, select the same user so they can receive an email notification whenever someone bubbles up
   5. In the upper right of the page, click Draft to change the task to the Ready status
   6. Click on Back to Sequence in the upper left of the page
   7. In the upper right of the page, click Draft to mark the sequence itself as Ready
   8. Click Back to Campaign in the upper left of the page

5. Publish the Campaign

   All items on this campaign should be light green-greyed out (like the Start Dynamic Lead Nurture goal) which means we can safely Publish the campaign so it can be used.

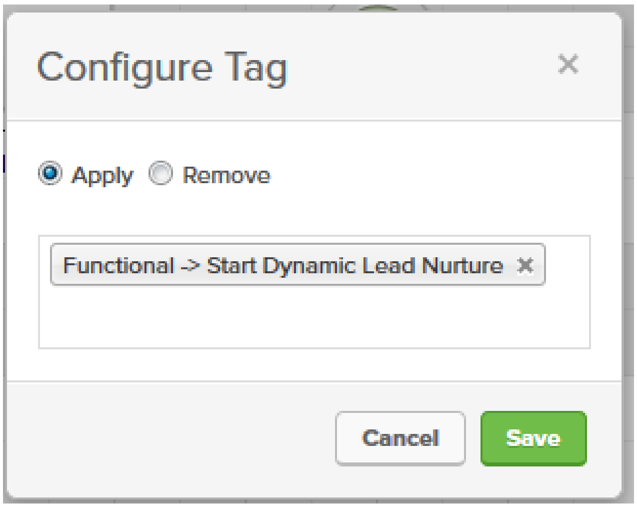
   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of this list to publish the campaign.

6. Update Existing Sales Process

   This campaign was designed to work as an enhancement to your existing sales process. Once a lead has made it to a certain point in your automated follow up, the campaign you just setup can be triggered automatically; all you have to do is apply this campaign's Start tag. For example, if you are offering a free lead magnet that drives towards a sale, you could trigger this dynamic lead nurture after they have received all sales emails but not made a purchase. You could also start this nurture immediately upon new lead capture if you don't have anything else automated happening to a new lead.

   1. Go into the campaign that contains your existing sales process OR lead capture

2. Double click into the sequence where you want leads to start this dynamic nurture
3. Using the Process menu on the right of the page, drag in a new Tag step and make sure it is connected to the automation flow
4. Update the Tag step to apply the Functional -> Start Dynamic Lead Nurture tag; click Save



5. In the upper left of the page, click Back to Sequence
6. In the upper right of the page, click the Publish button
7. Click the Publish button at the bottom of this list to publish the updates to this campaign

7. Now, the next time a lead makes it to this part in your sales process, this dynamic nurture campaign will automatically start.

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Hard Bounce Re-engage Campaign

Last Modified on 09/04/2018 11:01 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the **Hard Bounce Re-Engage** campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is an extension to Hard Bounce Recovery and invites someone to double check their subscription preferences after they provide a working, updated email address.

1. Download the Hard Bounce Re-Engage campaign from the Marketplace

2. MODIFY SUBSCRIPTION PREFERENCES FORM

   Out of the box, this campaign uses the Main Newsletter custom Drop-down field that comes with our newsletter campaign *. If you are using Tags OR some other custom Drop-down field(s) to segment your subscription list, you'll need to add these other subscriptions to the preferences form before publishing.
   * If you are only using the Main Newsetter custom Dropdown field, you may skip this step

   1. Double click the Subscription Preferences Double Check web form
   2. If you are not using the Main Newsletter custom field, hover over the field and click the Delete
   3. Add your existing subscriptions to the form
      - If you are using custom Dropdown fields to segment your subscriptions:
        1. Using the Field Snippets ribbon, drag in a new Other snippet
        2. Configure the snippet for the custom Dropdown field being used for a subscription; click Save
        3. Repeat steps 1&2 for all subscriptions that are segmented using a custom Dropdown field

- If you are using Tags to segment your subscriptions:
    1. Using the Field Snippets ribbon, drag in a new Checkbox snippet
    2. Configure the checkbox label for the subscription
    3. Click the Tag symbol next to the label and configure it for the Tag being used for the subscription; click Save
    4. Repeat steps 1-3 for all subscriptions that are segmented using a tag
4. In the upper right of the page, click Back to Campaign

3. Publish the CAMPAIGN

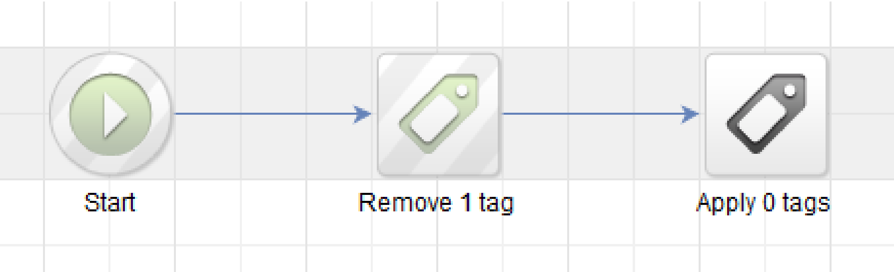
All items on this campaign are 100% configured upon install which means we can safely Publish the campaign so it can be used.

1. In the upper right of the page, click the Publish button
2. At the bottom of the checklist, click the Publish button to publish the campaign

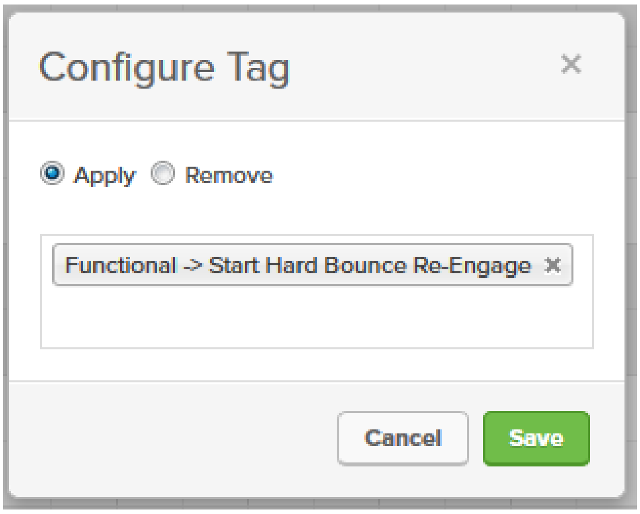
4. Update Existing Hard Bounce Recovery Campaign*

This campaign was designed to work as an extension to the Hard Bounce Recovery Campaign . That campaign's purpose is catch email addresses as they hard bounce so they can be updated. Once an update email has been provided, the campaign you just setup can be triggered automatically.
* You may also use this re-engagement campaign with any other process in your business where someone's email is updated

1. Go into the campaign that contains the existing hard bounce recovery process
2. Double click into the sequence that removes the hard bounce tag; this should be the sequence connected after the existing internal form goal used for updates
3. Using the Process menu on the right of the page, drag in a new Tag step and make sure it is connected to the automation flow



4. Update the Tag step to apply the Functional -> Start Hard Bounce Re-Engage tag; click Save



5. In the upper left of the page, click Back to Sequence
6. In the upper right of the page, click the Publish button
7. Click the Publish button at the bottom of this list to publish the updates to this campaign

5. Now, the next time someone provides a working email address, this re-engagement campaign will automatically start.

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Frequently Asked Question Campaign

Last Modified on 09/04/2018 11:01 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Frequently Asked Question Automation campaign that you can download for free from the Infusionsoft Marketplace.

This campaign sends a pre-authored email answering a frequently asked question (FAQ) when triggered by an Infusionsoft user.

Step-by-Step Instructions

1. Download the Frequently Asked Question Automation campaign from the Marketplace

2. Update Campaign Objects to Specify FAQ Topic

   The campaign installs with "Topic A" in the names of the different elements. To keep things meaningful and organized, you need to edit the elements so they reflect the real-world topic being discussed in the automated email.

   1. In the lower left corner of the FAQ - Topic A goal, double click the orange note symbol
   2. Replace "Topic A" in the Goal Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Goal Name can be "FAQ - Pricing")
   3. Double click the Note Template goal itself that you just renamed; do NOT click the orange note symbol again.
   4. Replace "Topic A" in the Title with the actual topic (e.g. If this is an FAQ email about pricing, the Title for this note can be "Sent FAQ - Pricing")
   5. In the upper right of the page, click Draft to mark the Note Template goal as Ready; in the upper left of the page click Back to Campaign
   6. Double click into the FAQ - Topic A sequence

7. In the upper left of the page, using the Sequence dropdown, select Rename
8. Replace "Topic A" in the Sequence Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Sequence Name can be "FAQ - Pricing")

3. Edit Email Template to Reflect FAQ Answer

   The FAQ email design and layout are pre-defined upon install. All you have to do is rename the email object and add in the specific answer to the email.

   1. Double click the FAQ - Topic A email
   2. In the upper left of the page, using the Email dropdown, select Rename
   3. Replace "Topic A" in the Email Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Email Name can be "FAQ - Pricing")
   4. Edit the email content to answer the frequently asked question
   5. In the upper right of the page, click Draft to mark the email as Ready; in the upper left of the page click Back to Sequence
   6. In the upper right of the page, click Draft to mark the sequence as Ready; in the upper left of the page click Back to Campaign

4. Publish the CAMPAIGN

   All items on this campaign should be light green-greyed out (like the FAQ - Topic goal) which means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of this list to publish the campaign.

5. Begin Triggering FAQs And Save Time

   Your FAQ email is ready to go! Now, the next time a Contact asks that specific question, you just need to apply the Note Template to their Contact Record and the email will send automatically. For a tutorial on how to apply Note Templates to a Contact click here .

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Newsletter Sign Up And Preference Center

Last Modified on 09/04/2018 11:01 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Newsletter Sign Up & Preference Center campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a sign up web form that adds someone to your newsletter list once they confirm their email. It also contains a preference center that can be linked to from within any newsletter that gets sent out.

1. Download the Newsletter Sign Up & Preference Center campaign from the Marketplace

2. Publish the CAMPAIGN

   All items on this campaign are 100% configured upon install which means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of this list to publish the campaign.

3. Put Newsletter Sign Up Form on Your Site*

   Your newsletter sign up form is now is ready to go! You just need to grab the form's web code and put it on your site.
   * If you already have an Infusionsoft-based newsletter sign up form on your website, skip to the next section

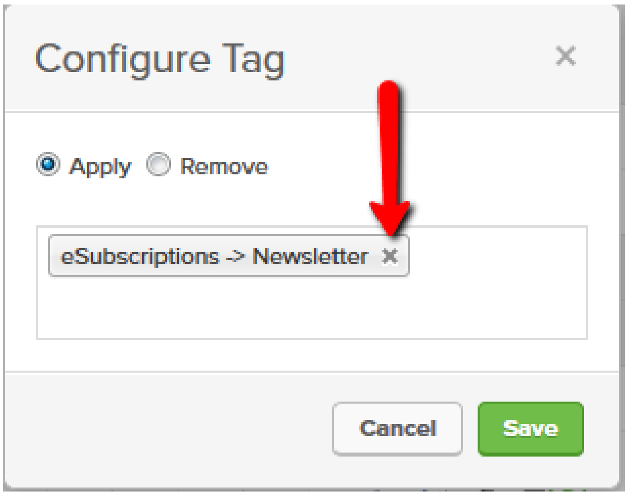
   1. After the publish is finished, in the upper left of the page just below the Back to List button, click on the Edit tab .

2. Double click on the Newsletter Sign Up WEB FORM goal
3. After the form opens, click on the Code tab towards the top middle of the page.
4. In the Do It Yourself section, copy the Javascript Snippet code; this is the actual code for the form itself.
5. Publish this form code on a page (or pages) of your website. Your website visitors now have a way to quickly and easily join your newsletter list!

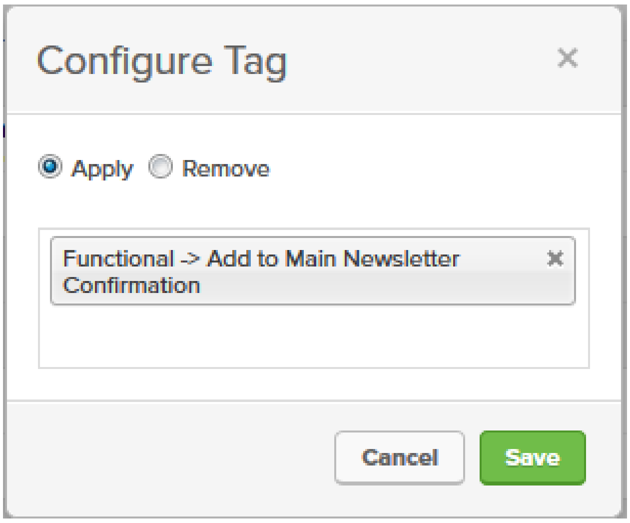
4. Update Existing Newsletter Sign Up Form(s) on Your Site*

   For the preference center to work, you segment your newsletter list using a custom Drop-down field (this is installed with the campaign); historically Infusionsoft users have segmented their newsletter list using a Tag. You will not be making any changes to your current newsletter sign up form, you will only be making changes to the existing automation on the back-end. In the next section, you will migrate your existing newsletter list from Tags to this new custom field.
   * If you installed the newsletter sign up form on your website using the previous section, skip to the next section

   1. Go into the campaign that contains the existing newsletter sign up form
   2. Double click into the sequence where the existing newsletter Tag gets applied; this should be the sequence connected after the existing sign up web form goal
   3. Double click into the Tag step which is applying the existing newsletter tag
   4. Next to the tag name, click the X to remove it from the step configuration



   5. Update the Tag step to apply the Functional -> Add to Main Newsletter Confirmation tag; click Save

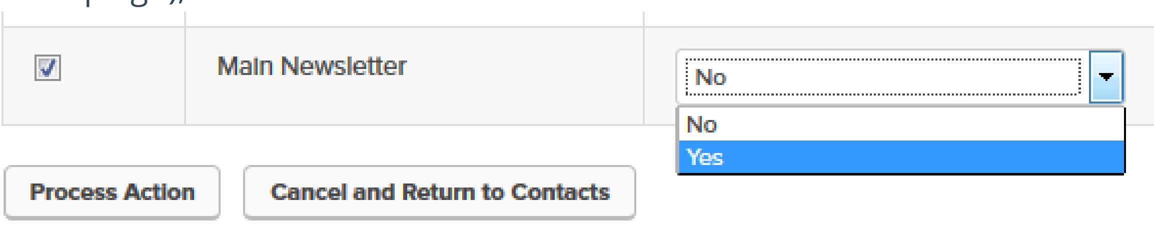


    6. In the upper left of the page, click Back to Sequence
    7. In the upper right of the page, click the Publish button
    8. Click the Publish button at the bottom of this list to publish the updates to this campaign
    9. Repeat steps 1-8 for each instance of your newsletter sign up forms, if applicable

5. Migrate Your Existing Newsletter Segmentation*

   Now that all newsletter sign ups will be using the custom Dropdown field to segment (instead of a Tag), you have to find all existing contacts with that tag, update the dropdown field on their Contact records and then delete the old newsletter tag.
   * If you do not have your newsletter list segmented by Tag already, you can skip to the next section

    1. Do a contact search for people with your existing newsletter Tag
    2. When you have your list of contacts, in the upper left of the results, click the Actions dropdown and select Mass Update Contacts
    3. In the list of contact fields, next to the "Main Newsletter" field (which installs with the campaign), check the box and select Yes



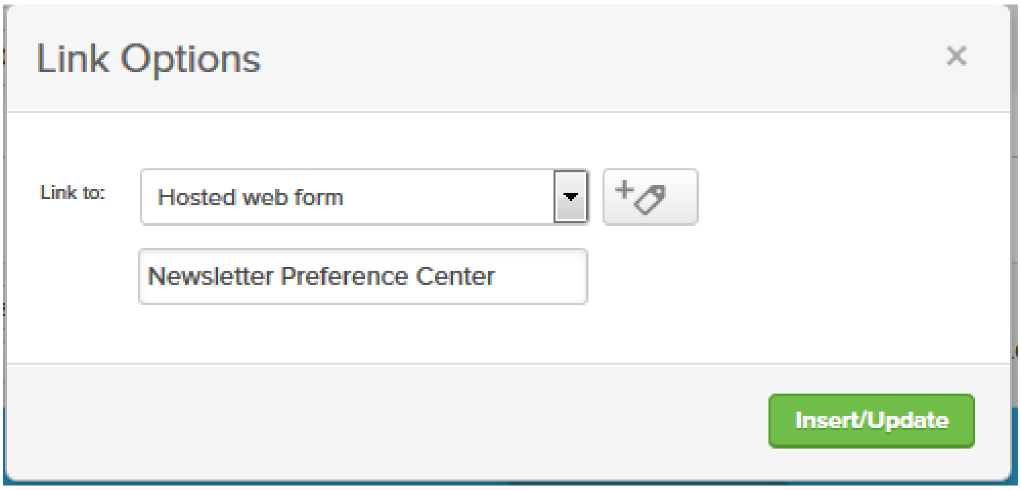
    4. At the bottom of the page, click Process Action
    5. Once the action has completed, hover over the main navigation and, in the CRM column, click on Settings at the bottom
    6. In the left menu, click on Tags
    7. Find the old newsletter tag and click into it
    8. At the bottom of the page click Delete this Tag and then click Ok to confirm.

Before deleting the Tag, verify the Tag is not being used in any other automation (campaign decision diamonds, lead scoring, etc.). If so, you'll need to update those automation pieces to use the new custom field instead before deleting the Tag.

6. ADD A LINK TO EMAIL PREFERENCES IN YOUR NEWSLETTERS

   Moving forward, in the footer of each newsletter, you'll want to include a link to the preferences center.

   1. When configuring an email link, select "Hosted Web Form" from the drop-down and find the preferences form



If you have a newsletter template that you use as a starting point each time, save yourself time by adding this preferences link to your newsletter template

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Weekly Management Check-In

Last Modified on 09/04/2018 11:02 am MST

This article provides instructions for launching the Weekly Management Check-In campaign that you can download for free from the Infusionsoft Marketplace.

This campaign sends a weekly reminder email asking for an employee's top contributions in the past week which they submit through a simple web form.

Step-by-Step Instructions

1. Download the Weekly Management Check-In campaign from the Marketplace

2. Assign the Fulfillment Lists

   The only setup step is to choose which users gets the two weekly reports on who did and didn't check in.

   1. Double click on the Weekly Check-In Emails sequence.
   2. Double click on the Employees That Didn't Check-In fulfillment step.
   3. In the Email Options section at the bottom of the page, select a user to receive the report using the To drop-down; this should be the people leader that needs to get these weekly reports.
   4. In the upper right of the page, click Draft to change the fulfillment list to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready.
   7. Click Back to Campaign in the upper left of the page.
   8. Double click on the Send Weekly Report & Reset sequence.
   9. Double click on the Employees Check-In Report fulfillment step.
   10. Repeat steps 3 through 7

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the ADMIN - Add to Weekly Check-In goal). This means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right
   2. Click the Publish button at the bottom of the checklist that displays to publish the campaign

4. Add Your Employees to the Weekly Check-In

   It is easy to add employees to this campaign! Simply submit the "ADMIN - Add to Weekly Check-In" internal form according to method in the linked article.

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Landing Page Template Pack 3

Last Modified on 07/17/2018 12:19 pm MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for using the landing page templates found in the Landing Page Template Pack #3 campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains five unique pre-designed landing page templates that can be easily brought into your other campaigns.

1. Download the Landing Page Template Pack #3 campaign from the Marketplace.

2. Use a Landing Page Design In Your Campaign

   Loading a landing page template into your campaign is easy!

   1. Go into a new or existing campaign (not the one you just installed)
   2. Drag out a new Goal onto the campaign canvas
   3. Give the goal a name, configure the goal to be achieved when a contact Submits a Landing Page form; click the green Save button
   4. Double click on the new Landing Page goal to edit it
   5. When it loads, in the upper left of the page click on the Landing Page button and select Copy from Campaign...
   6. Using the dropdown menu, select Landing Page Template Pack #3
   7. In the second dropdown that appears, select the specific landing page design you want to copy
   8. After verifying this is the design you want, click on the green Use This button in the lower right corner of the page
   9. You can now customize the landing page content for the specific campaign objective

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Holiday Card Address Collection

Last Modified on 09/04/2018 11:02 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Holiday Card Address Collection campaign that you can download for free from the Infusionsoft Marketplace.

This campaign makes it easy to collect addresses for people we want to send a holiday card.

1. Download the Holiday Card Address Collection campaign from the Marketplace

2. Configure Email Send Dates/Times

   In this part, you tell the campaign when you want to send the initial request email and the reminder. While you can configure the timers any way you wish, the idea is to make the initial address collection request and then send a reminder one week before you plan to actually mail the card.

   1. Double click into the Request Address for Holiday Card sequence.
   2. Double click the first Date Timer and configure it for one week before when you plan to send your holiday card; click the green Save button.
   3. Double click the second Date Timer and configure it for when you plan to send your holiday card; click the green Save button.
   4. In the upper right of the page, click Draft to mark the sequence as Ready; in the upper left of the page click Back to Campaign

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the ADMIN - Start Holiday Address Collection goal). This means we can safely Publish the campaign so it can be used.

1. Click the Publish button in the upper right.
2. Click the Publish button at the bottom of this list to publish the campaign.

4. START COLLECTING ADDRESSES

   This campaign can be triggered to a group of contacts or on an individual basis.

   To add a group of contacts to this campaign:

   1. Do a contact search for the segment of your database you want to send a holiday card but don't have a mailing address
   2. In the upper left of the search results, click the Actions drop-down and select Start/Stop a Campaign Sequence.
   3. Select the 'Holiday Card Address Collection' campaign from the second dropdown and then 'Request Address for Holiday Card' sequence from the third dropdown
   4. Process the action

5. To manually add a contact to this campaign:

   1. Apply the 'ADMIN - Start Holiday Address Collection' Note Template to a contact record. Click here for a tutorial on how to apply a Note Template.

Inbound Call Sales Rep Assignment

Last Modified on 09/04/2018 11:02 am MST

This article provides instructions for launching the Inbound Call Sales Rep Assignment campaign that you can download for free from the Infusionsoft Marketplace.

When a new lead calls in, easily enter their information and assign the lead to a sales rep – all by filling out a single internal form .

1. Download the Inbound Call Sales Rep Assignment campaign from the Marketplace

2. Assign a Backup User to the Follow Up Task

   The only setup step is to choose who is the backup user to receive the follow up task; this is a built-in safety feature to ensure every task is assigned to a user.

   1. Double click on the Sales Rep Follow Up sequence.
   2. Double click on the New Lead Follow Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready.
   7. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the LEAD - Inbound Phone Call goal). This means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of the campaign checklist to publish the campaign.

4. Start Assigning Inbound Phone Leads to Sales Reps

   Your campaign is ready to go! The next time you need to assign an inbound phone lead to a sales rep submit the "LEAD - Inbound Phone Call" internal form according to this tutorial .

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Easy Password Recovery

Last Modified on 09/04/2018 11:03 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Easy Password Recovery campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a web form your membership site users can use to request their password via email.

1. Download the Easy Password Recovery campaign from the Marketplace

2. Setup the Campaign Link

   The email delivering a member's password also points the member back to your membership site login page. In this part, you tell the campaign the login page URL.

   1. In the upper left of the page, click on the Campaign dropdown and click on Links.
   2. Click Edit to change the Member Login Page URL.
   3. Update the placeholder URL with the actual URL of your membership site login page and click Save.
   4. Click on Close in the lower right corner of this menu to close it.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the Password Recovery Formgoal). This means we can safely Publish.

   1. Click the Publish button in the upper right of the page.
   2. Click the Publish button at the bottom of this list to finish publishing the campaign.

4. Put Password Recovery Form on Your Site

    Your password recovery form is now is ready to go! You just need to grab the form's web code and put it on your site.

    1. After the publish is finished, in the upper left of the page just below the Back to List button, click on the Edit tab .
    2. Double click on the Password Recovery Form WEB FORM goal
    3. After the form opens, click on the Code tab towards the top middle of the page.
    4. In the Do It Yourself section, copy the Javascript Snippet code; this is the actual code for the form itself.
    5. Publish this form code on a page (or pages) of your membership website. Your members now have a way to quickly and easily recover their membership password!

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List Migration Reactivation

Last Modified on 09/04/2018 11:03 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the List Migration Reactivation campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains an email series designed to reactivate email subscribers that you have imported from another email system.

1. Download the List Migration Reactivation campaign from the Marketplace
2. Assign the Fulfillment List

   The only setup step is to choose who gets the list of subscribers who should be removed from any mass broadcast segments.

   1. Double click on the Flag for Removal sequence.
   2. Double click on the Inactive Subscribers fulfillment step.
   3. In the Dashboard Options section at the bottom of the page, select a user from the Assign To drop-down.
   4. In the upper right of the page, click Draft to change the fulfillment list to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   7. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the Keep Me On Your List goal). This means we can safely Publish the campaign so it can be used.

1. Click the Publish button in the upper right
2. Click the Publish button at the bottom of the menu that displays to publish the campaign

4. Add Your Imported List to The Reactivation Series

   It is easy to manually add a group of contacts to this campaign.

   1. Do a contact search for the imported segment of your list you want to reactivate.
   2. When you have the segment you want, from the Actions dropdown in the upper left of the search results, select Start/Stop a Campaign Sequence.
   3. Select the 'List Migration Reactivation' campaign from the second dropdown and then 'List Migration Reactivation' sequence from the third dropdown.
   4. Process the action.

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Satisfaction Survey

Last Modified on 09/04/2018 11:03 am MST

This article provides instructions for launching the Satisfaction Survey campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a one-question survey that will capture the satisfaction level of your customers. Then, automate your follow up based on their level of satisfaction.

1. Download the Satisfaction Survey campaign from the Marketplace

2. Assign the Follow-up Task

   The only setup step is to choose who gets the follow-up task when someone is not satisfied.

   1. Double click on the Not Satisfied sequence.
   2. Double click on the Not Satisfied Follow Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the Notify these users section, select the same user so they can receive an email notification whenever someone bubbles up.
   5. In the upper right of the page, click Draft to change the task to the Ready status.
   6. Click on Back to Sequence in the upper left of the page.
   7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   8. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

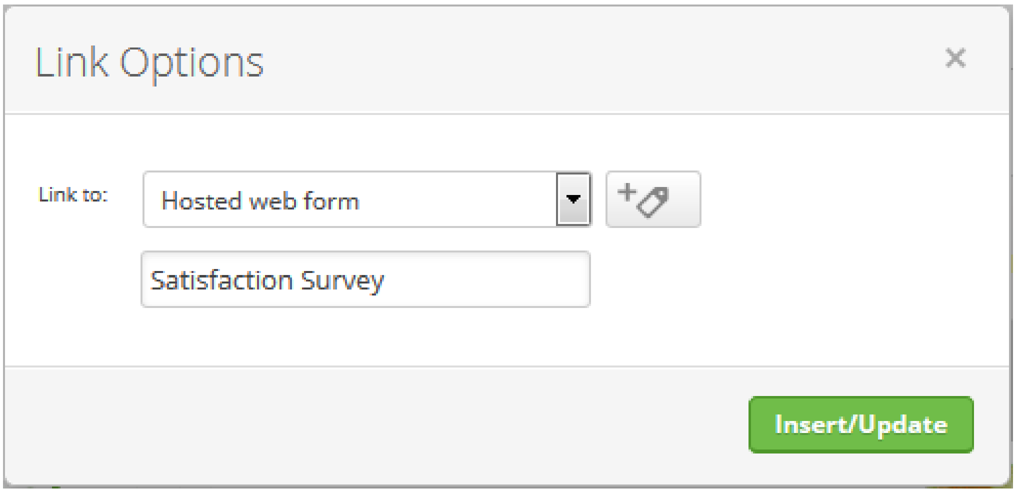
   All items on this campaign by now should look light green/greyed out (just like the Satisfaction Surveygoal). This means we can safely Publish the campaign so it can be used.

   1. Click the green Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. DRIVE TRAFFIC TO THE SURVEY

You can easily link to this survey from within any email.

1. When configuring an email link, select "Hosted Web Form" from the drop-down and find this satisfaction form



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Contact Me Bubble Up

Last Modified on 09/04/2018 11:03 am MST

This article provides instructions for launching the Contact Me Bubble Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a simple re-usable workflow that lets a contact easily request a personal follow up.

1. Download the Contact Me Bubble Up campaign from the Marketplace

2. Assign the Follow-up Task

   The only setup step is to choose who gets the follow-up task when someone bubbles up from an email.

   1. Double click on the Task to Contact sequence.
   2. Double click on the Contact Bubble Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the Notify these users section, select the same user so they can receive an email notification whenever someone bubbles up.
   5. In the upper right of the page, click Draft to change the task to the Ready status.
   6. Click on Back to Sequence in the upper left of the page.
   7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   8. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the Functional -> Contact Me Bubble Up goal). This means we can safely Publish the campaign so it can be used.

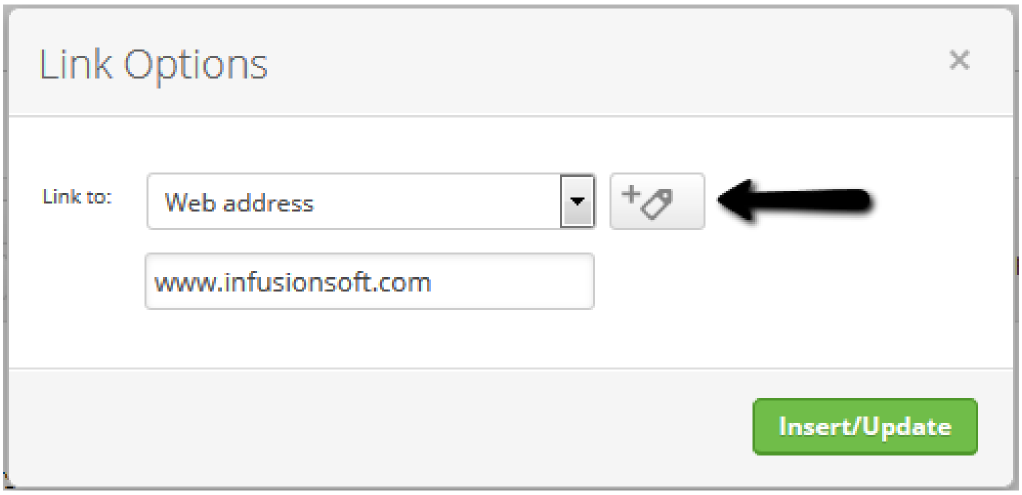
   1. Click the green Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. BEGIN ADDING BUBBLE UP FUNCTIONALITY TO YOUR CAMPAIGNS AND BROADCASTS

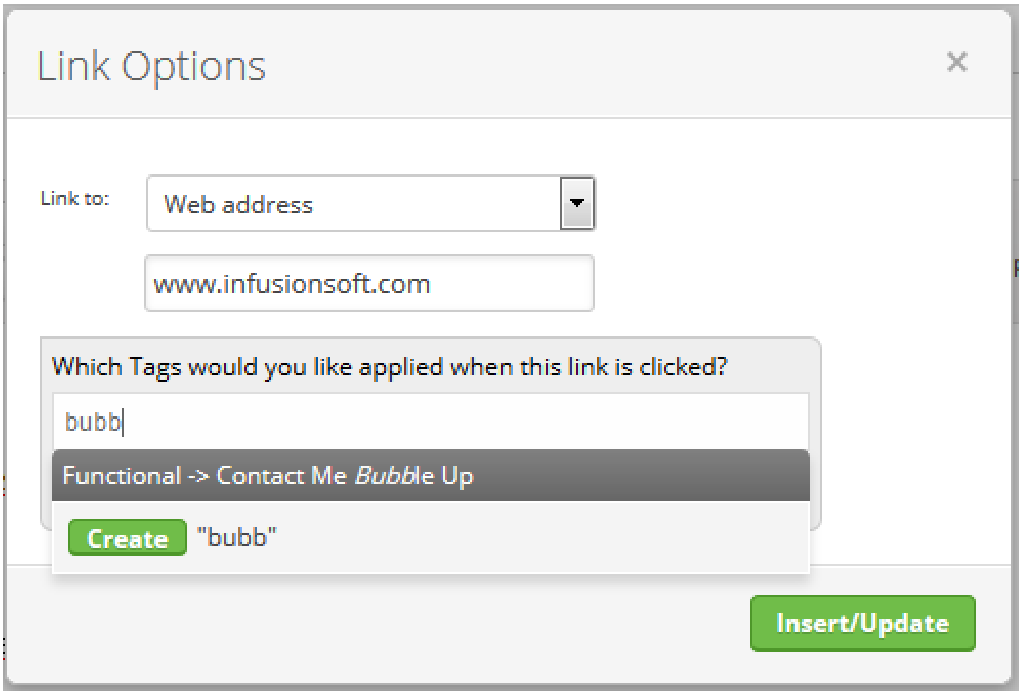
You can easily add a link in any email that applies the functional tag.

To apply this tag from a Campaign Email:

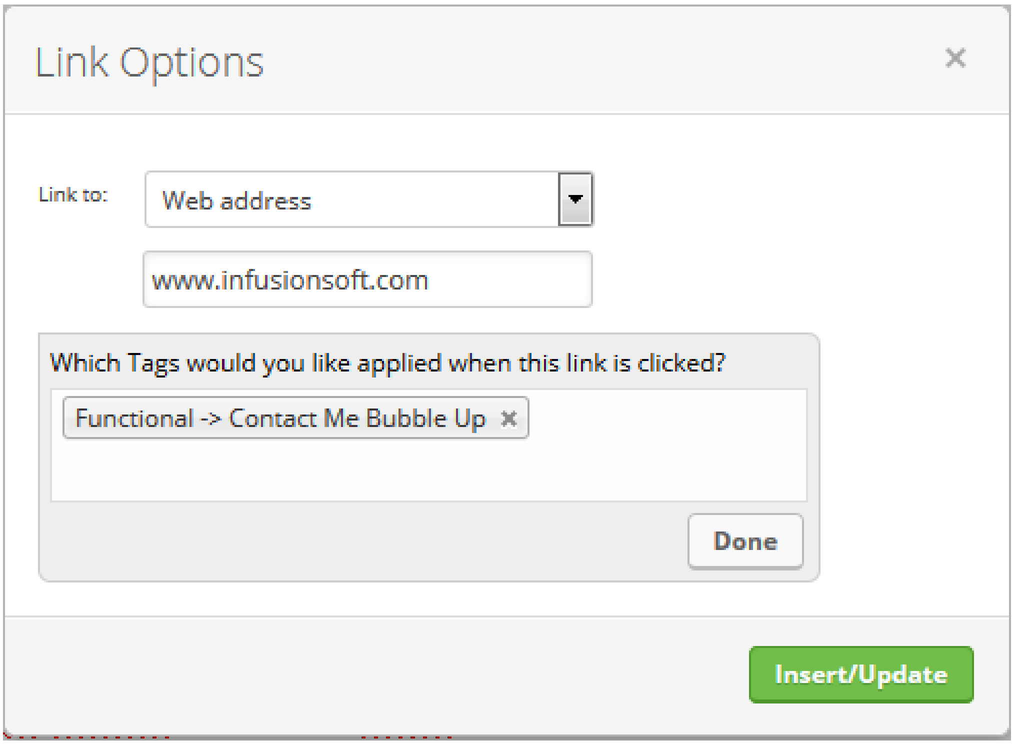
1. When configuring a link in a Campaign Email, click the Auto-Tag button



2. Begin typing the name of the tag
3. When the tag appears as an option, click on it



4. Click Insert/Update


Link Options
Link to:
Web address
www.infusionsoft.com
Which Tags would you like applied when this link is clicked?
Functional -> Contact Me Bubble Up
Done
Insert/Update

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Facebook Event Promotion

Last Modified on 09/04/2018 11:04 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Facebook Event Promotion campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a simple email series inviting contacts to check out an upcoming event listing on Facebook.

1. Download the Facebook Event Promotion campaign from the Marketplace
2. Setup the Campaign Field and Campaign Link

   This campaign points a contact to your event on Facebook. In this part, you tell the campaign the event name and your event's URL.

   1. In the upper left of the page, click on the Campaign dropdown and click on Merge Fields.
   2. Click the pencil icon next to Event Date & Time to edit the merge field value.
   3. Insert the event's date and time and click the Save icon.
   4. Repeat steps 2 & 3 for the Event Name.
   5. Click on Close in the lower right corner of this menu to close it.
   6. Click on the Campaign dropdown again and click on Links.
   7. Click Edit to change the Event URL.
   8. Update the placeholder URL with the actual URL of the Facebook event page and click Save.
   9. Click on Close in the lower right corner of this menu to close it.
3. Configure The Campaign's Date Timers

All emails are written to be ready to send out-of-the-box. We just have to tell the campaign when the "Day Before" reminder email should go out.

1. Double click into the Check Out Our Upcoming Event sequence.
2. Double click on the first Date Timer.
3. Configure the timer to go out one day before the event date during normal business hours; click Save.
4. Double click on the second Date Timer.
5. Configure the timer for one day after the event starts; click Save.
6. In the upper right corner of the page, click on Draft to change the sequence to Ready; click Back to Campaign in the upper left of the page.

4. Publish the Campaign

All items in this campaign by now should look light green/greyed out (like the Click to View Event goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right of the page; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

5. Invite Your List to The Event

It is easy to manually add a group of contacts to this campaign.

1. Do a contact search for the segment of your list you want to invite to the event.
2. When you have the segment you want, from the Actions dropdown in the upper left of the search results, select Start/Stop a Campaign Sequence.
3. Select the 'Facebook Event Promotion' campaign from the second dropdown and then 'Check Out Our Upcoming Event' sequence from the third dropdown.
4. Process the action.

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Landing Page Template Pack 2

Last Modified on 09/04/2018 11:04 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for using the landing page templates found in the Landing Page Template Pack #2 campaign that you can download for free from the Infusionsoft Marketplace.

A user can easily copy one of the landing page designs into a campaign which they are actively working.

1. Download the Landing Page Template Pack #2 campaign from the Marketplace.

2. Copy a landing page design into another campaign

   Copying over an existing landing page from one campaign into another is a powerful tactic to save time!

   1. Go into a new or existing campaign (not the one you just installed)
   2. Drag out a new Goal onto the campaign canvas
   3. In the lower left corner of the Goal, click on the small colored icon to open the Goal Settings
   4. Configure the goal to be achieved when a contact Submits a Landing Page form; click the green Save button
   5. Double click on the new Landing Page goal to edit it
   6. When it loads, in the upper left of the page click on the Landing Page dropdown and select Copy from Campaign...
   7. Using the dropdown menu, select Landing Page Template Pack #2
   8. In the second dropdown that appears, select the specific landing page design you want to copy
   9. After verifying this is the design you want, click on the green Use This button in

the lower right corner of the page

3. Customize the landing page.

   You should now customize the landing page content for your specific business.

4. Customize the Thank-you page & Settings

   The last piece to configure is the content on the Thank-you page and the link to share the landing page on Facebook.

   1. Click on the Thank-you page tab at the top of the page
   2. Customize the page content with the appropriate information; do not worry about the Facebook share link yet
   3. Click the Code tab at the top of the page
   4. Copy the landing page URL; click back to the Thank-you page tab
   5. Double click the 'Share on Facebook' link to configure the link options
   6. The link is pre-populated with "https://www.facebook.com/sharer/sharer.php?u=REPLACE_ME_WITH_LANDING_PAGE_URL". Replace everything after the "u=" in this link with the actual URL to the landing page; click the green Insert/Update button
   7. Click on the Settings tab at the top of the page and configure any necessary options
   8. In the upper right of the page click on Draft to mark the landing page as Ready
   9. In the upper left of the page click on Back to Campaign and continue building out the campaign

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Post Appointment Follow Up Campaign

Last Modified on 09/04/2018 11:04 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Post-Appointment Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

After an employee submits an internal form with the specific post-appointment communication, the contact receives a branded email with that information.

1. Download the Post-Appointment Follow Up campaign from the Marketplace
2. Publish the Campaign

   This campaign is 100% ready to launch, no setup required.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.
3. Send A Post-Appointment Follow Up Email

   Your campaign is ready to go! The next time you need to send a post-appointment follow up email...

   If they are a new contact:

   1. Submit the "Send Post-Appointment Follow Up" internal form according to this tutorial .
4. If they are an existing contact:

1. Submit the "Send Post-Appointment Follow Up" internal form according to this tutorial .

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Social Review Promotion Campaign

Last Modified on 09/04/2018 11:05 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Social Review Promotion campaign that you can download for free from the Infusionsoft Marketplace.

After an invite tag is applied to a contact, they receive up to three emails inviting the contact to click and leave a review on a particular social channel.

This campaign can be used with any social network where users can leave recommendations or reviews.

1. Download the Social Review Promotion campaign from the Marketplace

2. Setup the Campaign Field and Campaign Link

   This campaign points a contact to your profile on a social network. In this part, you tell the campaign which social network and your social profile's URL.

   1. In the upper left of the page, click on the Campaign dropdown and then click on Merge Fields.
   2. Click the pencil icon next to the Social Channel to edit the merge field value.
   3. Insert the name of the resource and click the Save icon.
   4. Click on Close in the lower right corner of this menu to close it.
   5. Click on the Campaign dropdown again and click on Links.
   6. Click Edit to change the Social Profile URL.
   7. Update the placeholder URL with the actual online location of the resource and click Save.
   8. Click on Close in the lower right corner of this menu to close it.

3. Publish the Campaign

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the Invite to Social Reviewgoal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Start Requesting Social Reviews Automatically

   Your social review request is ready to go!

   To automatically trigger this campaign:

   1. Navigate to another campaign you want to use with this social review promotion
   2. Open the sequence of the campaign where you want to request a social review
   3. At the appropriate point in the sequence flow, add a Tag step that applies the Functional -> Invite to Social Review tag.
   4. Re-publish that campaign so the next time a contact reaches that point in the sequence, the tag will automatically start them in this document workflow

5. To manually trigger this campaign for an individual customer:

   1. Apply the Functional -> Invite to Social Review Tag to someone's contact record

6. To manually trigger this campaign for a group of customers:

   1. Do a contact search to find the segment of your database that could provide a social review
   2. When you have the segment you want, from the Actions dropdown in the upper left of the search results, select Apply/Remove Tag
   3. Apply the Functional -> Invite to Social Review tag
   4. Process the action

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Event Purchase Follow Up Automation Campaign

Last Modified on 09/04/2018 11:05 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Event Purchase Follow-Up Automation campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is triggered when someone purchases an event ticket through Infusionsoft. The new registrant will receive three emails leading up to the event.

1. Download the Event Purchase Follow-Up Automation campaign from the Marketplace

2. Set up the Campaign Merge Fields

   This campaign contains information about the live event so you need to input those details.

   1. In the upper left of the page, click on the Campaign dropdown and then click on Merge Fields.
   2. Click the pencil icon next to the Event Address to edit the merge field value.
   3. Insert the address of the event (e.g. 1260 S Spectrum Blvd. Chandler, AZ 85286) and click the Save icon.
   4. Repeat the previous two steps to fill in the values for Event Date(s), Event Name, and Event Time(s).
   5. Click on Close in the lower right corner of this menu to close it.

3. Configure the Ticket Purchase Goal

   This campaign is automatically triggered when an event ticket is sold through Infusionsoft. You have to configure the purchase goal with the specific event ticket product.

   1. Double click on the Purchase Live Event Ticket goal
   2. Select Specific Product Purchase and then choose the specific event ticket product; click Save.

4. Set up the Follow-Up Timers

   Since this campaign is sending out reminder emails with respect to a live event, you have to tell the campaign when the emails should be sent.

   1. Double click the Live Event Follow-Up sequence.
   2. Double click the first Date timer and set for a date one week before the event; click Save.
   3. Double click the second Date timer and set for a date one day before the event; click Save.
   4. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   5. Click Back to Campaign in the upper left of the page.

5. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the Purchase Live Event Ticket goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

6. Start Selling

   Your Event Purchase Follow-Up is ready to go! This campaign will start automatically when someone purchases an event ticket through Infusionsoft.

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Automated Lead Follow Up Campaign

Last Modified on 09/04/2018 11:05 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Automated Lead Follow-Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is triggered when a new lead fills out the contact request web form, which creates a follow up task. The new lead is then automatically nurtured via email until the follow up task is marked as completed.

1. Download the Automated Lead Follow-Up campaign from the Marketplace

2. Assign an Owner and Configure Task to Call

   The only thing to configure for this campaign is who will be tasked with calling a new lead.

   1. Double click on the Task to Call & New Lead Nurturing sequence.
   2. Double click on the Assign to Rep owner step.
   3. Select the user that will contact the new lead via the dropdown and click on the green Save button.
   4. Double click on the New Lead Call task.
   5. Select the same user from the Assign to (backup) dropdown as did in the previous steps.
   6. In the upper right of the page, click Draft to change the task to the Ready status.
   7. Click on Back to Sequence in the upper left of the page.
   8. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   9. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

All items on this campaign by now should look light green/greyed out (like the Task to Contact Completed goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Put Request Form on Your Site

Your request form is now is ready to go! You just need to grab the form's web code and put it on your site.

Appointment Reminder Campaign

Last Modified on 09/04/2018 11:06 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Appointment Reminder campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is triggered when an employee fills out an internal form with the date and time of a scheduled appointment. Immediately a confirmation email is sent and two reminder emails leading up to the appointment are scheduled. Two days before the appointment, the reminder email gives the recipient an option to reschedule/cancel the appointment. If this happens, a task to reschedule is created.

1. Download the Appointment Reminder campaign from the Marketplace
2. Assign the Follow Up Task

   The only thing to configure for this campaign is who will be tasked with contacting someone that requests to cancel/reschedule an appointment.

   1. Double click on the Task to Reschedule sequence.
   2. Double click on the Task to Reschedule task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   7. Click Back to Campaign in the upper left of the page.
3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the ADMIN -

Schedule Appointment goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Start Scheduling Appointment Reminders

Your campaign is ready to go! The next time you need to schedule appointment reminders for a contact in your database...

1. If they are a new contact: Submit the ADMIN - Schedule Appointment internal form according to this tutorial .
2. If they are an existing contact: Submit the ADMIN - Schedule Appointment internal form according to this tutorial .

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W-9 Collection Campaign

Last Modified on 09/04/2018 11:06 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the W-9 Collection campaign that you can download for free from the Infusionsoft Marketplace.

This campaign delivers the W-9 form and allows you to easily record when you receive it. The campaign can be triggered automatically from another campaign or you can manually start it using the Note Template .

1. Download the W-9 Collection campaign from the Marketplace

2. Publish the Campaign

   This campaign is 100% ready to launch, no setup required.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

3. Launch the Campaign

   To automatically trigger this campaign:

   1. Navigate to another campaign you want to use with this tax doc collection.
   2. Open the sequence of the campaign where you want to request a W-9.
   3. At the appropriate point in the sequence, add a Tag step that applies the Functional -> Start W-9 Collection tag.
   4. Re-publish that campaign so the next time a contact reaches that point in the sequence, the tag will automatically start them in this document workflow.

4. To manually trigger this campaign for an individual prospect:
    1. Apply the ADMIN - Request W-9 Note Template to someone's contact record
5. To manually trigger this campaign for a group of contacts:
    1. Do a contact search to find the segment of your database that needs a W-9 on file.
    2. When you have the segment you want, from the Actions drop-down in the upper left of the search results, select Apply/Remove Tag.
    3. Apply the Functional -> Start W-9 Collection tag.
    4. Process the action.
6. To log when a W-9 has been received:
    1. Apply the ADMIN - W-9 Received Note Template to someone's contact record.

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Refer-A-Friend Campaign

Last Modified on 09/04/2018 11:06 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Refer a Friend campaign that you can download for free from the Infusionsoft Marketplace.

This campaign asks someone to refer a friend by providing the friend's name and phone number. Once the referral has been submitted, a follow up task is created to reach out to the new lead.

1. Download the Refer a Friend campaign from the Marketplace

2. Assign the Follow Up Task

   The only thing to configure for this campaign is who will be tasked with contacting the newly referred lead.

   1. Double click on the Task to Call New Referral sequence.
   2. Double click on the New Referral Call task.
   3. Select a user from the Assign to (backup) dropdown.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   7. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the *Start Refer a Friend goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Start Asking for Referrals

   This campaign can be triggered automatically or manually.

   To automatically trigger this campaign:

   1. Navigate to another campaign you want to use with this referral request
   2. Open the sequence of the campaign where you want someone to start the nurture
   3. At the appropriate point in the sequence flow, add a Tag step that applies the Functional -> Start Refer a Friend tag.
   4. Re-publish that campaign so the next time a contact reaches that point in the sequence, the tag will automatically ask for a referral.

5. To manually trigger this campaign for an individual customer:

   1. Apply the Start Refer a Friend Note template to someone's contact record.

6. To manually trigger this campaign for a group of customers:

   1. Do a contact search for the segment of your customers you want to ask for a referral.
   2. When you have the segment you want, from the Actions dropdown in the upper left of the search results, select Apply/Remove Tag
   3. Apply the Functional -> Start Refer a Friend tag
   4. Process the action

Easy Follow Up Campaign

Last Modified on 09/04/2018 11:07 am MST

This article provides instructions for launching the Easy Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

1. Download the Easy Follow Up campaign from the Marketplace
2. Assign the Follow Up Task

   By default the follow up task will be assigned to the user that owns the contact record. However, a backup user needs to be chosen in case there isn't an assigned owner.

   1. Double click on the Task to Follow Up sequence.
   2. Double click on the Task to Follow Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   7. Click Back to Campaign in the upper left of the page.
3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the ADMIN - Schedule Follow Up goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.
4. Start Scheduling Follow Up Tasks

   Your campaign is ready to go! The next time you need to schedule a follow up for a contact in your database...

   - If they are a new contact - Submit the "ADMIN - Schedule Follow Up" internal form according to this tutorial .

- If they are an existing contact - Submit the "ADMIN - Schedule Follow Up" internal form according to this tutorial .

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Free Resource Campaign

Last Modified on 09/04/2018 11:07 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Free Resource campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a web form where people can request a copy of an online resource. Upon form submission, the contact will receive an email with a download link for the resource and they will be tagged accordingly if they actually download it. This campaign can be used with any type of resource: a spreadsheet, slideshow, etc. You will need the resource hosted somewhere online that is publicly accessible.

1. Download the Free Resource campaign from the Marketplace

2. Set up the Campaign Field and Campaign Link

   This campaign delivers a free resource when someone requests it. In this part, you tell the campaign the title of the resource and where it lives.

   1. In the upper left of the page, click on the Campaign drop-down and then click on Merge Fields.
   2. Click the pencil icon next to the Resource Title to edit the merge field value.
   3. Insert the name of the resource and click the Save icon.
   4. Click on Close in the lower right corner of this menu to close it.
   5. Click on the Campaign drop-down again and click on Links.
   6. Click Edit to change the Resource URL.
   7. Update the placeholder URL with the actual online location of the resource and click Save.
   8. Click on Close in the lower right corner of this menu to close it.

3. Customize the Web Form

3. Customize the Web Form

   In this part, we simply update the opt-in form with your resource title.

   1. Double click on the Free Resource Request goal.
   2. In the Title snippet, update the placeholder name with the actual name.
   3. If you want to receive a notification when someone opts in, click the Settings tab at the top. In the Notification Email section, insert the email address you want to receive notifications.
   4. In the upper right of the page, click on Draft to change the form's status to Ready.
   5. Click on Back to Campaign in the upper left of the page.

4. Publish the Campaign

   All items on this campaign by now should look light green/grayed out (like the Free Resource Request goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

5. Put Request Form on Your Site

   Your request form is now is ready to go! You just need to grab the form's web code and put it on your site. After publishing a campaign, the builder will take you to Performance Mode view.

   1. Click on the Edit tab in the upper left of the page just below the Back to List button.
   2. Double click on the Free Resource Request web form goal
   3. After the form opens, click on the Code tab towards the top middle of the page.
   4. In the Do It Yourself section, copy the JavaScript Snippet code; this is the actual code for the form itself.
   5. Publish this form code on a page (or pages) of your website. You now have a way to quickly and easily capture leads on your website!

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Document Follow Up Campaign

Last Modified on 09/04/2018 11:07 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Document Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is designed to streamline the creation and delivery of a specific document. An employee can request the document's creation via our mobile applications or directly inside Infusionsoft. This creates a task to create and send the document. There is an automated follow up email one day after the document task is marked as complete.

1. Download the Document Follow Up campaign from the Marketplace

2. Setup the Campaign Field

   This campaign references the specific document in the creation task as well as the follow up email. In this part, you tell the campaign the name or type of document being created and sent.

   1. In the upper left of the page, click on the Campaign drop-down and then click on Merge Fields.
   2. Click the pencil icon next to the Document Name to edit the merge field value.
   3. Insert the name or type of document (e.g. "1099 Form") and click the Save icon.
   4. Click on Close in the lower right corner of this menu.

3.

4. Assign the Follow-up Task

   The next step is to choose who gets the document create & send task when a request comes in.

1. Double click on the Task to Create & Send Document sequence.
2. Double click on the Create & Send Document task.
3. Select a user from the Assign to (backup) drop-down.
4. In the Notify these users section, select the same user so they can receive an email notification when a new lead comes in.
5. In the upper right of the page, click Draft to change the task to the Ready status.
6. Click on Back to Sequence in the upper left of the page.
7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
8. Click Back to Campaign in the upper left of the page.

5.

6. Publish the Campaign

All items on this campaign by now should look light green/greyed out (like the ADMIN - Request Document goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

7.

8. Begin Requesting Document Creation

Your workflow is ready to go! Now you just have to start requesting documents.

- To request document creation on-the-go from any Infusionsoft mobile application: Apply the 'Functional -> Request Document' tag to someone's contact record
- To request document creation when using Infusionsoft in a full web browser: Apply the 'ADMIN - Request Document' Note template to someone's contact record

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Simple Lead Capture For Sales Teams Campaign

Last Modified on 09/04/2018 11:08 am MST

This article provides instructions for launching the Simple Lead Capture for Sales Teams campaign that you can download for free from the Infusionsoft Marketplace. This campaign contains a pre-built web form you can place on your website to collect leads. Upon form submission, a sales opportunity is created and assigned to a sales rep to follow-up with the new lead.

1. Download the Simple Lead Capture for Sales Teams campaign from the Marketplace

2. Setup the Sales Opportunity Creation

   The only setup required is to tell the campaign who gets assigned new sales opportunities.

   1. Double click on the Create Sales Opportunity sequence.
   2. Double click on the Create Sales Opportunity opportunity.
   3. In the Starting Stage section, select the first stage of your sales pipeline; this most likely named "New Lead", "New Opportunity" or something similar.
   4. In the Assigned User section, select the sales rep to receive this new sales lead.

      Round Robin: If you have more than one sales rep, you can also select a Round Robin. To setup a Round Robin follow this tutorial.

   5. (Optional) Click the check-box to prevent duplicate opportunities from being created if the contact is already in the sales pipeline.
   6. In the Next Action Date, set it to be 0 days from now so your sales rep can work this lead immediately.
   7. In the Next Action Notes, type the first action the sales rep should take for the new opportunity. Feel free to provide some context as well. Copy/paste this example to save time, "This is a new lead that came from the website. Contact them to see if they are qualified."

8. Click the green Save button in the lower right to save the settings for the automated opportunity creation.
9. In the upper right of the page, click Draft to mark the sequence as Ready!
10. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (just like the Simple Lead Capture goal). This means we can safely Publish the campaign so it can be used.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Deploy the Campaign by Putting the Simple Lead Capture Form on Your Site

   Your lead capture form is now is ready to go! You just need to grab the form's web code and put it on your site. After publishing a campaign, the builder will take you to Performance Mode view.

   1. Click on the Edit tab in the upper left of the page just below the Back to List button.
   2. Double click on the Simple Lead Capture web form goal
   3. After the form opens, click on the Code tab towards the top middle of the page.
   4. In the Do It Yourself section, copy the Javascript Snippet code; this is the actual code for the form itself.
   5. Publish this form code on a page (or pages) of your website. You now have a way to quickly and easily capture leads on your website and get them to a sales rep!

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Automate A Task Driven Process

Last Modified on 10/03/2018 1:33 pm MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Automate A Task-Driven Process campaign that you can download for free from the Infusionsoft Marketplace.

This campaign provides a Note Template an employee can apply to any contact which automatically creates a task.

1. Download the Automate A Task-Driven Process campaign from the Marketplace

2. **Customize the default Note Template**

   The Note Template comes out-of-the-box referencing a 'Task A'. In this part you will customize the Note for the specific task you want it to create.

   1. Double click ADMIN - Task A to edit the Note Template's name.
   2. Replace "Task A" in the goal name with the actual task this Note will create. For example, you could rename the goal to "ADMIN - Send New Customer Cookies" if the task being created is to send a new customer some cookies in the mail.
   3. Double click inside the circle of the Note Template itself to configure the note details.
   4. Update all references to "Task A" with the actual task being performed. Feel free to include extra context in the Description or Creation Notes. For example, using the cookie example from step 2, the Description could be "Need to send new customer cookie kit" and the Creation Notes could be "We need to send the new customer kit with cookies."
   5. Click the green Save button to update the Note Template.

3. **Customize the Task**

Now that you've customized the Note Template, you need to customize the task that will be created.

1. Double click on the Task A sequence.
2. Double click on the Task A task.
3. Update all references to "Task A" with the actual task being performed. Feel free to include extra context in the Title or Body of the task. Remember, you can include merge fields to facilitate task completion. For example, if the task is to send cookies to a new customer, you can merge in the customer's mailing address to the task Body so the end-user doesn't have to waste time tracking down that information.
4. Select the user who will be completing the task from the Assign to (backup) dropdown.
5. In the upper right of the page, click Draft to change the task to the Ready status.
6. Click on Back to Sequence in the upper left of the page.
7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
8. Click Back to Campaign in the upper left of the page.

4. **Publish the Campaign**

All items on this campaign by now should look light green/greyed out (like the Note Template goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

5. **Begin Automating Task Creation**

Your campaign is ready to go! The next time you need to create this task, apply the Note Template to someone's contact record. For a tutorial on how to apply Note templates to a contact click here .

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Sales Pipeline Starter Kit

Last Modified on 09/04/2018 11:08 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions and best-practice strategies for setting up the Sales Pipeline Starter Kit campaign that you can download for free from the Infusionsoft Marketplace. This campaign gives you all the tools necessary to build an automated, systematic and strategic process for managing the communication between a sales person and their leads.

1. Download the Sales Pipeline Starter kit from the Marketplace

2. Rename your sales stages and publish your campaign

    1. In the main navigation menu, go to CRM > Settings
    2. Click on Sales Pipeline
    3. Click Edit next to "Custom Stage 1" and rename it.
    4. Repeat for "Custom Stage 2"
    5. Click on Opportunity defaults to specify your active sales stages.
    6. Set the Win stage as "Win" and set the Loss stage as "Loss."
    7. Go into the Sales Pipeline Starter Kit Campaign.
    8. Double click on the goal/sequence titles and replace "Custom Stage 1/2" with the actual stage name.
    9. Publish the campaign

3. Setup your dashboard for daily pipeline management

   You need to set up two saved opportunity searches; one that shows your active pipeline and one that lists opportunities that slipped through the cracks.

    1. In the main navigation menu, go to CRM > Opportunities
    2. (optional) Click Start Over to create a new search
    3. Set the following search criteria:
        - Opportunity tab > Stages: All stages selected Except Win/Loss
        - Opportunity tab > Owner: Current User

        - Columns tab > Custom Columns:
            - Contact Name
            - Opportunity
            - Stage
            - Next Action Date
            - Next Action Notes
    4. Scroll down and sort by Next Action Date
    5. Click the OK button.
    6. Click Save
    7. Name it "My Active Pipeline" and check the box to Add this search to the user home
    8. Click Edit Criteria/Columns and set the next action date custom interval to 365 days ago and/or -1 days after today
    9. Click Ok
    10. Click on Options and click Save As and name it "My Overdue Pipeline." Check the box to add this search to the user home.
    11. Hover over the Home icon in the upper right corner of the page and click on Dashboard
    12. Add the following widgets to your dashboard:
        - Calendar Items
        - Tasks and Pipeline Stages
    13. Click Settings at the bottom of the Pipeline Stages widget.
        - Select all stages except the Win/Loss
        - View stages for users we are setting up the dashboard for.
    14. Organize the dashboard according to the video above.

4. Learn how to manage an opportunity record

You can create opportunities manually or automatically .

Simple Lead Capture Campaign

Last Modified on 09/04/2018 11:09 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Simple Lead Capture campaign that you can download for free from the Infusionsoft Marketplace. This campaign contains a pre-built web form you can place on your website to collect leads. Upon form submission, a task is created to follow-up with the new lead.

1. Download the Simple Lead Capture from the Marketplace

2. Assign the Follow-up Task

   The only setup step is to choose who gets the follow-up task when a new lead comes in.

   1. Double click on the New Lead Notification sequence.
   2. Double click on the New Lead Notification task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the Notify these users section, select the same user so they can receive an email notification when a new lead comes in.
   5. In the upper right of the page, click Draft to change the task to the Ready status.
   6. Click on Back to Sequence in the upper left of the page.
   7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   8. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the Simple Lead Capture goal). This means we can safely Publish the campaign so it can be used.

    1. Click the green Publish button in the upper right; this will display a list of all items to be published.
    2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Put Lead Capture Form on Your Site

   Your lead capture form is now is ready to go! You just need to grab the form's web code and put it on your site.

    1. Click on the Edit tab in the upper left of the page just below the Back to List button.
    2. Double click on the Simple Lead Capture WEB FORM goal
    3. After the form opens, click on the Code tab towards the top middle of the page.
    4. In the Do It Yourself section, copy the Javascript Snippet code; this is the actual code for the form itself.
    5. Publish this form code on a page (or pages) of your website. You now have a way to quickly and easily capture leads on your website!

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Using Landing Page Templates

Last Modified on 09/04/2018 11:09 am MST

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for using the landing page templates found in any of the Landing Page Template Pack campaigns that you can download for free from the Infusionsoft Marketplace.

These campaigns contain unique pre-designed landing page templates that can be easily brought into your other campaigns.

Loading a landing page template into your campaign is easy!

1. Go into a new or existing campaign (not the one you just installed)
2. Drag out a new Goal onto the campaign canvas
3. Give the goal a name, configure the goal to be achieved when a contact Submits a Landing Page form; click the green Save button
4. Double click on the new Landing Page goal to edit it
5. When it loads, in the upper right of the page click on the Landing Page button and select Copy from Campaign...
6. Using the dropdown menu, select the Landing Page Template Pack containing the design you want
7. In the second dropdown that appears, select the specific landing page you want to copy
8. After verifying this is the design you want, click on the green Use This button in the lower right corner of the page
9. You can now customize the landing page content for the specific campaign objective

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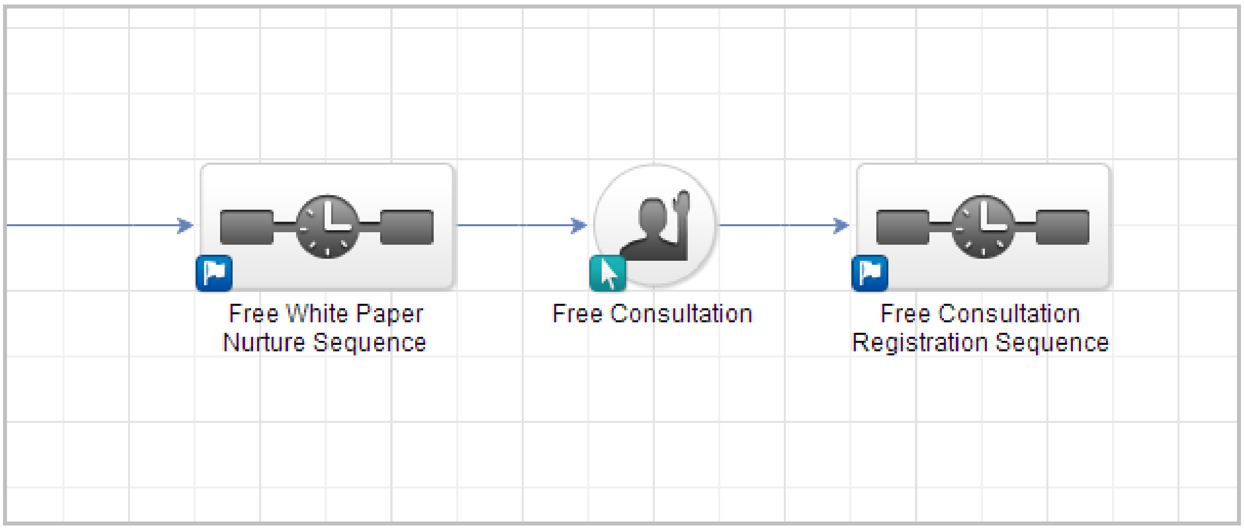
Link Automation Primer

Last Modified on 07/23/2018 11:40 am MST

Email links are a subtle, yet powerful way to engage email readers and personalize the follow-up messages they receive. Email links can be used to automatically initiate a change in the way you communicate with each contact. When the recipient clicks on an email link, the link action or campaign sequence you've attached to it will fire off automatically. An automated response can be assigned to campaign email links, broadcast email automation link s, double opt-in links, updates links, opt-out links, image links, and more. There are several different types of automation links in Infusionsoft.

Campaign Goal Links

These special links are set up in the campaign builder. They allow you to transition contacts through various automation processes. For example, when a contact clicks a campaign goal link in an email indicating that they have hav interest in a free consultation, they can be transferred to a "Free Consultation" campaign sequence that automates the consultation registration process. This is the most common type of automation link in Infusionsoft.



Automation Links

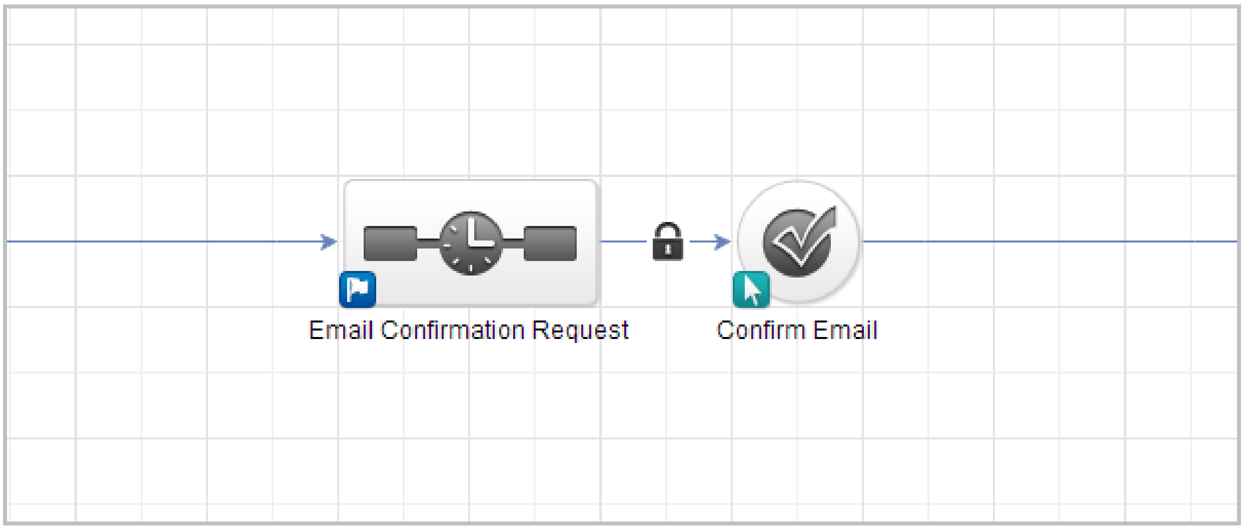
Similar to Campaign Goal Links, automation links serve a similar purpose, but are used primarily in Email Broadcasts. You can create as many automation links as you wish and reuse them in other email broadcasts. You can manage your automation links by going to **Marketing > Settings > Automation Links** in the main navigation menu.

- Link to an external web page or a customizable Infusionsoft thank-you web page.
- Tracks the number of clicks and displays them in various email reports.
- Automation links are used in broadcast emails.
- You can save automation links and use them in more than one email.

Confirmation Links (Double Opt-In Links)

When clicked, these special email links set the contact record's email address to a "Confirmed" or "Double Opt-In" status. An email with a confirmed status has higher email deliverability. Confirmation Links in a campaign are created using the campaign builder, while Confirmation Links in an Email Broadcasts are created in **Marketing > Settings > Automation Links.**

- Link to a default, but customizable, Infusionsoft double opt-in web page.
- Updates the email status on a contact record to "confirmed"



Update Links

Links to a default web page that allows a contact to update their contact information.

- Links to a default update web page that allows contacts update contact information. You are not able to customize the update page.
- Updates the information in a contact record automatically.


Update / Opt-Out Links

Create Update / Opt-Out

Edit	Name	Delete
[Edit]	Default Opt-Out	N/A

Opt-Out (Unsubscribe) Link

Links to a default Opt-Out web page. If the contact opts out, you will no longer be able to send automated emails to that person. All automated emails sent from your Infusionsoft account contain an unsubscribe link.

- Links to a default opt-out confirmation web-page. You are not able to customize this page.


Update / Opt-Out Links

Create Update / Opt-Out

Edit	Name	Delete
[Edit]	Default Opt-Out	N/A

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Custom Unsubscribe And Opt Out Links

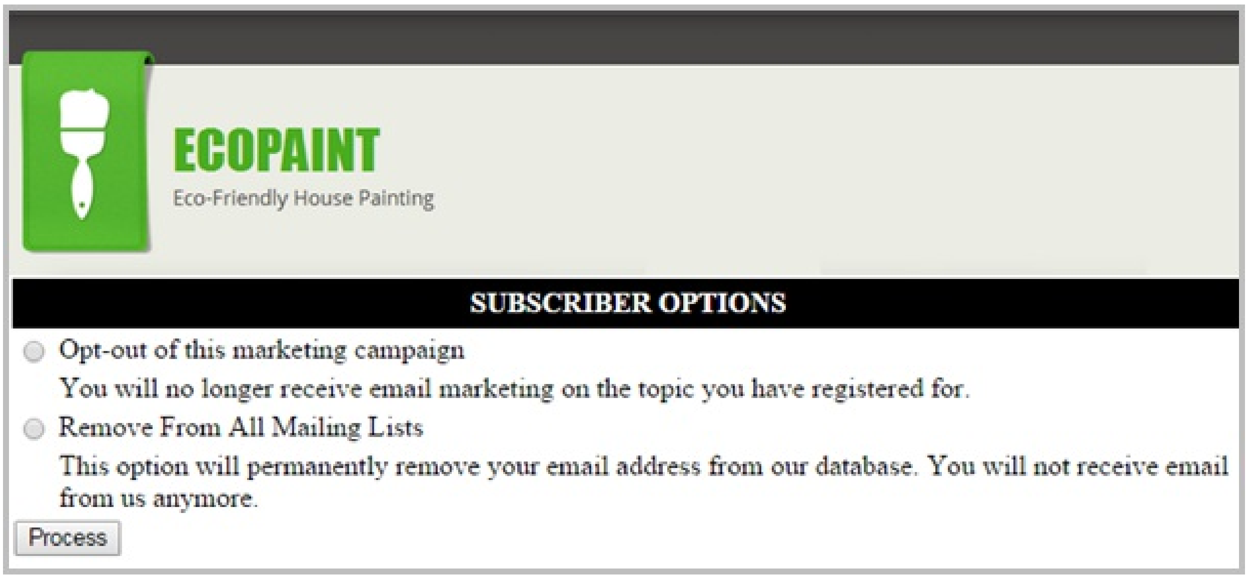
Last Modified on 08/08/2018 3:57 pm MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**. Custom Unsubscribe/Opt-Out links are not supported in the campaign builder or when sending an broadcast using the modern email builder.

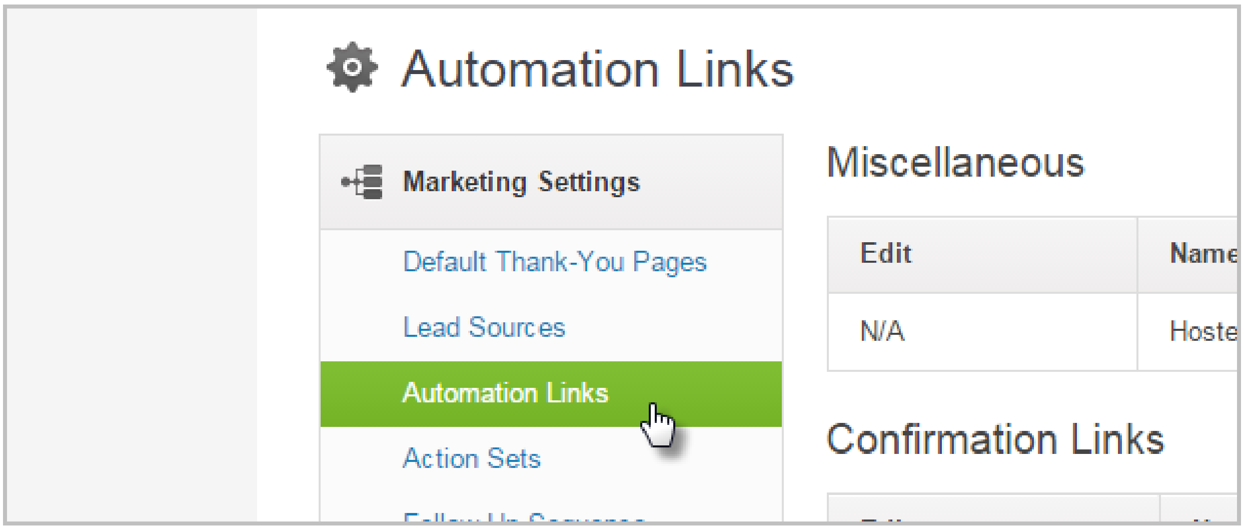
There is a default unsubscribe / opt-out link displayed on the bottom of every broadcast email. These are considered marketing emails and are subject to the requirements of the CAN SPAM Act. You are not able to remove the opt-out link from these emails, but you can replace them with custom opt-out links.

Each custom unsubscribe / opt-out link offers up to 2 options:

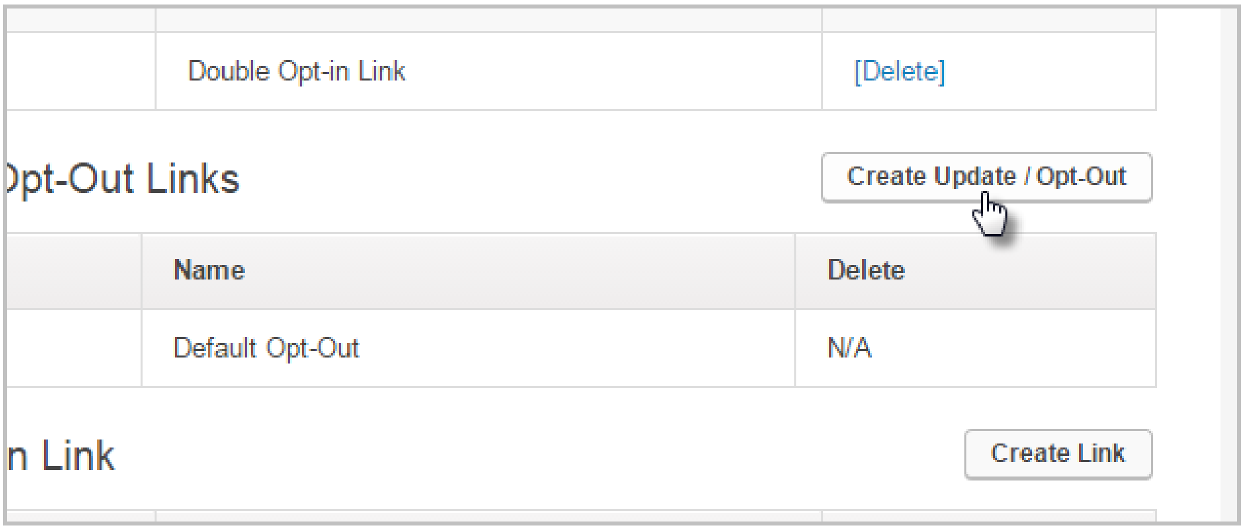
- **Remove from All Email Marketing:** This is the default option. When an email recipient selects it, their email status is changed to "opt-out" in Infusionsoft and the system will skip this person's email address when sending Broadcast and Follow-Up Sequence emails. You can also set up global actions that run whenever someone chooses the "Remove from All" through Marketing > Settings > Email Defaults.
- **(Optional) Remove from series of emails:** You can set up an alternative unsubscribe option for each opt-out link. This option allows an email recipient to unsubscribe from one series of emails (e.g. 10 Must-Dos), but continue to receive other broadcast and sequence messages.



1. Go to **Marketing** > **Settings**
2. Click on **Automation Links** in the settings menu.

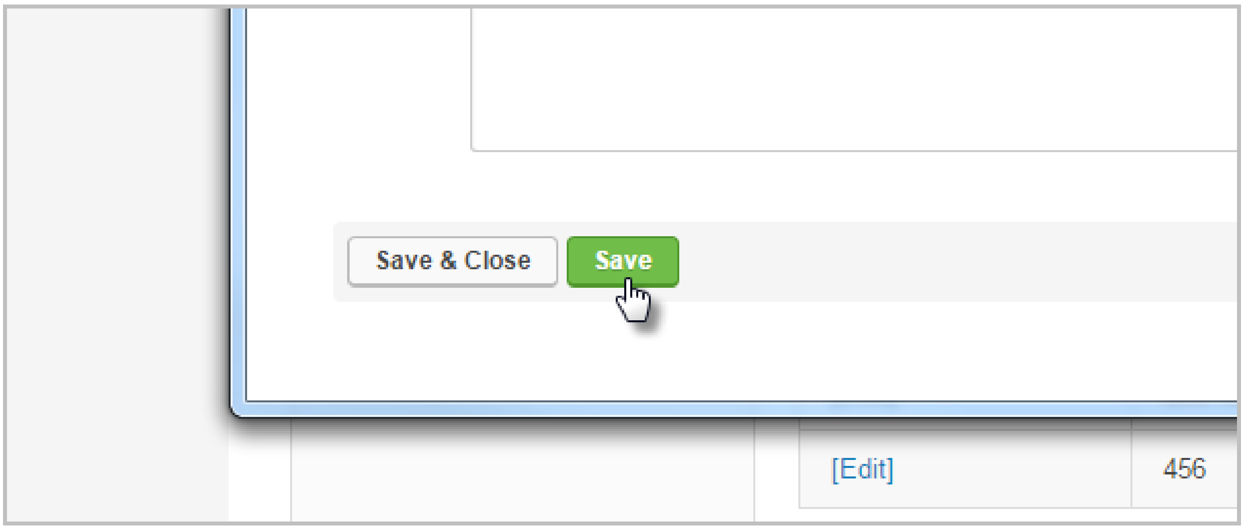


3. Click on the **Create Update / Opt-Out** button to add a new link.



- **Name**: Enter the name you'll use to identify this link (email recipients won't see this name). It should be short and descriptive.
- **Type**: Select Opt-Out from the drop-down. The opt-out link sends visitors to a confirmation web page that is hosted in Infusionsoft. This page displays a message asking the person to confirm their desire to opt-out of all email marketing and (if configured) offers the alternative option allowing email readers to unsubscribe from one specific series of emails.
- **(Optional) Link Blurb (HTML)**: Click on the Edit tab to add text or images that will show up above the opt-out link.
- **Link Text**: This text will show up as a hyperlink in HTML emails. The recipient will click on the words you enter here (e.g. "Unsubscribe")
- **Link Blurb (Plain Text)**: This message will show up above the link in plain text emails. It usually says something like: "Click on the link below to unsubscribe." Note: You are not able to mask links with text or images in a Plain Text email.

4. Click on the **Save** button to create the link.

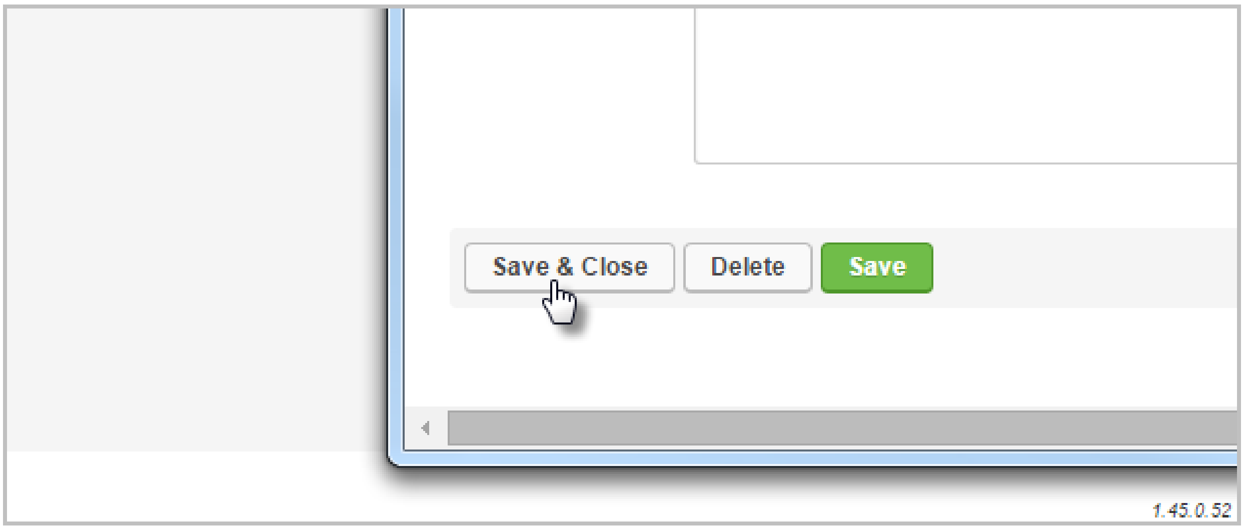


5. (Optional) Scroll down to the Opt-Out Page Display Information section. Use this area to add an alternative unsubscribe option. This option allows someone to choose between unsubscribing from of all of your email marketing or only one series of email marketing messages. This is optional, but highly recommended.

   - Opt-Out Header: Enter the name of an email series (e.g.10 Must-Dos Tips Series.)
   - Opt-Out Description: Enter a more detailed description of the emails (e.g. "Choose this option if you want to stop receiving the 10 Must-Dos tip emails, but want to continue to receive other messages from Fully Baked Co.")
   - Click on the Actions tab. Note: You must add actions to adjust the follow up.
     - If the person is unsubscribing from a broadcast series, then you need to remove the tag you use to identify the broadcast list.
     - If the person is unsubscribing from a series of messages that are delivered

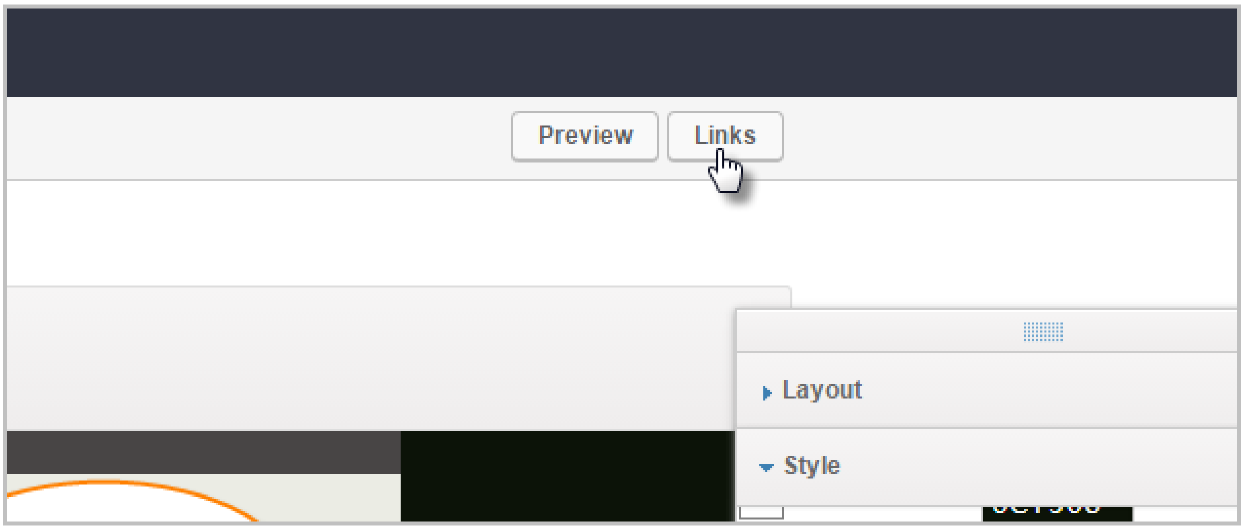
through a legacy follow-up sequence, then you need to remove the tag and stop the follow-up sequence.

6. Click on the **Save & Close** button, then go to **Marketing** > **Templates** to insert the custom double opt-in link into the corresponding emails.



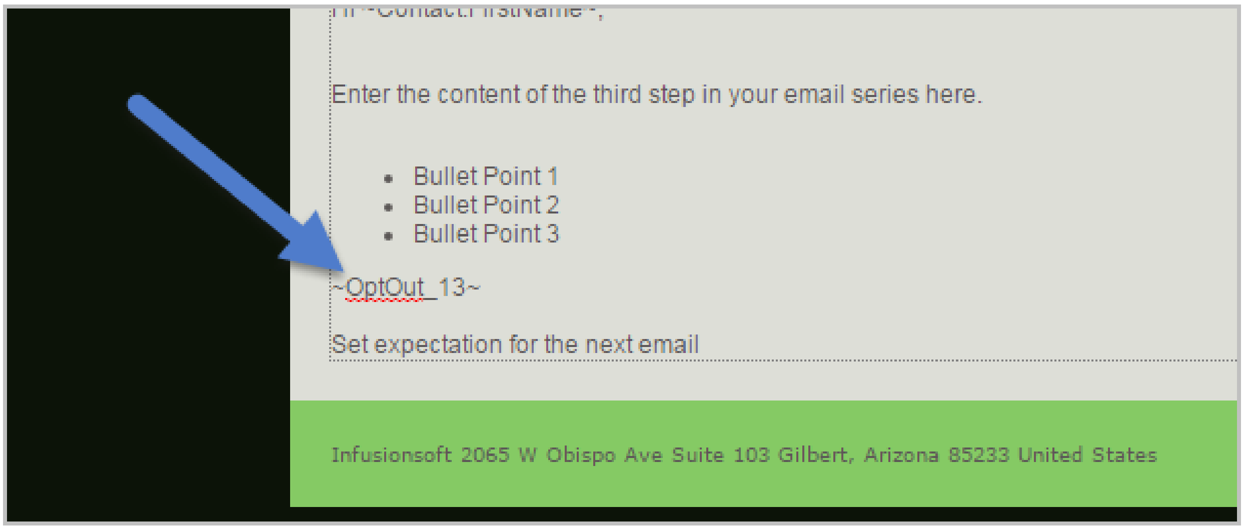
7. Open your email to edit it with the drag & drop builder.

8. Click inside the email where you want to insert the link. Now, click on the **Links** button to choose the link you created. Note that you can set up these links while you are creating the email.

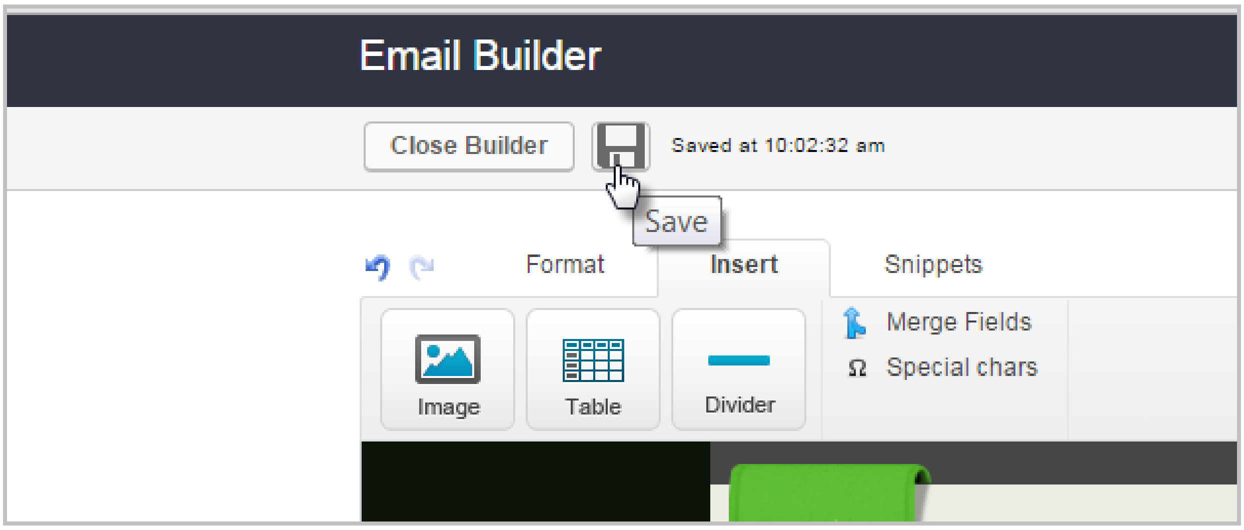


Code Builder: If you build your emails using the Code Builder, you will need to click the arrow on the **Merge** button to find the Merge Fields option.

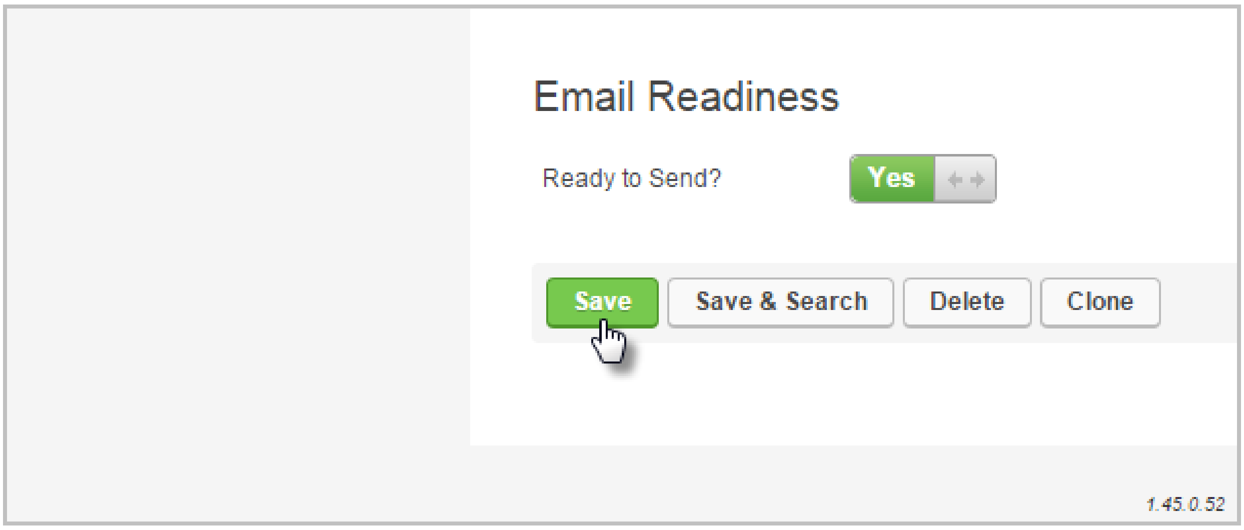
9. The double opt-in link merge field should show up in the email.



10. Click on the **Save** button to save the email update and click on **Close Builder** to return to the email template.



11. Scroll down and click on the **Save** button to apply the updates to the email template.



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Custom Double Opt-In Link

Last Modified on 07/23/2018 11:56 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**. Custom Unsubscribe/Opt-Out links are not supported in the campaign builder or when sending an broadcast using the modern email builder.

Double opt-in links are used to confirm a person's request to receive your email marketing. They are generally inserted into a confirmation email that is sent from a web form. You can use the default double opt-in link or create a custom link that triggers a set of actions. When the email recipient clicks on a double opt-in link their email status is updated to "double opt-in" and the actions assigned to that link fire off automatically.

1. Go to **Marketing > Settings**
2. Click on **Automation Links** in the settings menu.
3. Click on the **Create Opt-In** button to create a new link.
    - Name: Enter the name you'll use to identify this link (email recipients won't see this name.) It should be short and descriptive.
    - (Optional) Link Blurb (HTML): Click on the Edit tab to add text or images that will show up above the double opt-in link every time it is used in an email.
    - Link Text: This text will show up as a hyperlink in HTML emails. The recipient clicks on the words you enter here (e.g. "Click here to confirm your monthly newsletter subscription.")
    - Link Blurb (Plain Text): This message will show up above the link in plain text emails. It usually says something like: "Click on the link below to confirm your monthly newsletter subscription." Note: You are not able to mask links with text or images in a plain text email.
4. Click on the **Save** button to create the link.

5. Click on the **Double Opt-In Page Appearance** tab to customize the web page email recipients see after they click on the double opt-in link.

    - **Merge Field for Opt-In Header**: By default the system uses the ~Company.Company~ merge field in the header message ("Your email address, ~Contact.Email~, has been confirmed. You will now receive email communication from ~Company.Company~."). This merge field pulls the company name you've entered under Admin > Settings > General settings. You can delete the ~Company.Company~ merge field and replace it with a specific company name.
    - **Header Color**: Select a color option from the drop-down. The default is white text on a black background.
    - **Page Content:** Click on the Edit or Source tab to customize the web page message and design. Use the Edit tab to use Infusionsoft's built in WYSIWYG editor or click on Source to paste in HTML code you've created outside of Infusionsoft.

6. (Optional) Click on the **Actions** tab to add one or more action that automatically update tags and / or follow-up processes.

7. Click on the **Save & Close** button.

8. Open your email to edit it with the drag & drop builder.

9. Select a location for the double opt-in link and then click on the **Links** button to choose a link or create a new one. If you build your emails using the Code Builder, you will need to click the arrow on the **Merge** button to find the Merge Fields option.

10. The double opt-in link merge field should show up in the email. It will look something like this: ~OptIn_35~

11. Click on the **Save** button to save the email update and click on Close Builder to return to the email template.

12. Click on the **Save** button to apply the updates to the email template.

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Create An Automation Link

Last Modified on 08/20/2018 4:27 pm MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**. Automation links are not supported in the campaign builder or when sending an broadcast using the modern email builder.

The automation links you use in broadcast emails track recipients' click-through responses and can initiate a series of actions in Infusionsoft that automatically update tags and follow-up. You can create text and image automation links.

1. Go to **Marketing > Templates**
2. Click on the name of an existing email template to edit it using the drag & drop builder, or add a new email template.
3. Highlight the text you want the email recipient to click on or select an image that's been inserted into the message using an Image, Paragraph, or Article Snippet.
4. Click the **Link** button in the WYSIWYG editor toolbar.
5. Select a link type from the drop-down.
    - Web address: Enter the full URL (e.g. http://fullybaked.com/blog/business) for any web location.
    - Email address: Enter a full email address (e.g. rachel.baker@fullybaked.com)
    - Thank-you page: This thank-you page is hosted by Infusionsoft. Use the WYSIWYG or HTML source editor to create a simple thank-you message.
    - Hosted Email page: This is usually used in the pre-header of an HTML email or in the plain text version of the email. It links to the hosted version of the email in case someone is having difficulty viewing it through their email client.
    - Update page: This links to a page that displays the contact's current contact information and allows then to make changes if something is no longer correct.
    - Opt-Out page: This links to a page where a contact can unsubscribe from all email

marketing.

6. Click on the **Actions** drop-down to add one or more action to this link. Click on the Save button for each action, and then click on the Finish & Close Window button to save the action set.

7. (Optional) Click on the Other options link to save this link for future use. If you re-use this link in other emails, the actions will also carry over.

   - **Don't Track Who Clicks this Link**: Mark this checkbox if you are linking to a common web address that does not tell you any details about a person's interest.
   - **Place the person's details at the end of the URL**: Mark this checkbox if you want to pass information from the person's Infusionsoft contact record into the Web Address URL. This is used to pass information into hidden fields on a web form or to personalize the message on the landing page. This option requires additional programming outside of Infusionsoft.
   - **Save this link for later use**: Mark this checkbox if you want to use this link in more than one email. The link Actions will be the same every time the link is used.

8. Click on the **Insert/Update** button to add the link to the email.

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Pass Contact Information To A URL From An Automation Link

Last Modified on 07/23/2018 11:57 am MST

Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in **Marketing > Templates**. Automation links are not supported in the campaign builder or when sending an broadcast using the modern email builder.

The Infusionsoft system tracks clicks on the automation link s you insert into drag & drop email templates and can automatically update that person's contact record or change follow-up communications based on the click. It can also pull information from the email recipient's contact record and place it in the URL of the web page they visit after clicking on the link. This allows you to personalize the page they visit (e.g. display their name) and / or pre-populate fields in a web form (e.g. their name and email address), so they can fill out the form more quickly and to minimize duplicates in your database.

To use this option, you must create a web page on your site instead of using the automation link thank-you page. This page must be coded to pull the information out of the URL and display it on the page or place it into the proper fields on a form. This requires some basic knowledge of website code - you may need to contact your website administrator to request assistance.

You can enable this option when you create or edit an automation link per the instructions below to add it later.

1. Go to **Marketing** > **Settings**
2. Click on **Automation Links** in the settings menu to view a list of saved automation links. Click on Edit for the one you want to configure or Click the **Create** button.
3. Scroll down and to the right to find the More Options link.
4. Mark the check box to place the person details at the end of the URL and select the

fields you want to pass (e.g. First Name / Email.) Hold down the **Ctrl** key to select more than one.

5. Click on the **Save & Close** button to apply the change. Make sure the destination web page is programmed to capture the information from the URL and display it or place it into web form fields. If you are linking them to one of your Infusionsoft web forms or landing pages, the fields will automatically pre-populate without any further configuration needed.

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Set up Legacy Invoice

Last Modified on 07/23/2018 11:59 am MST

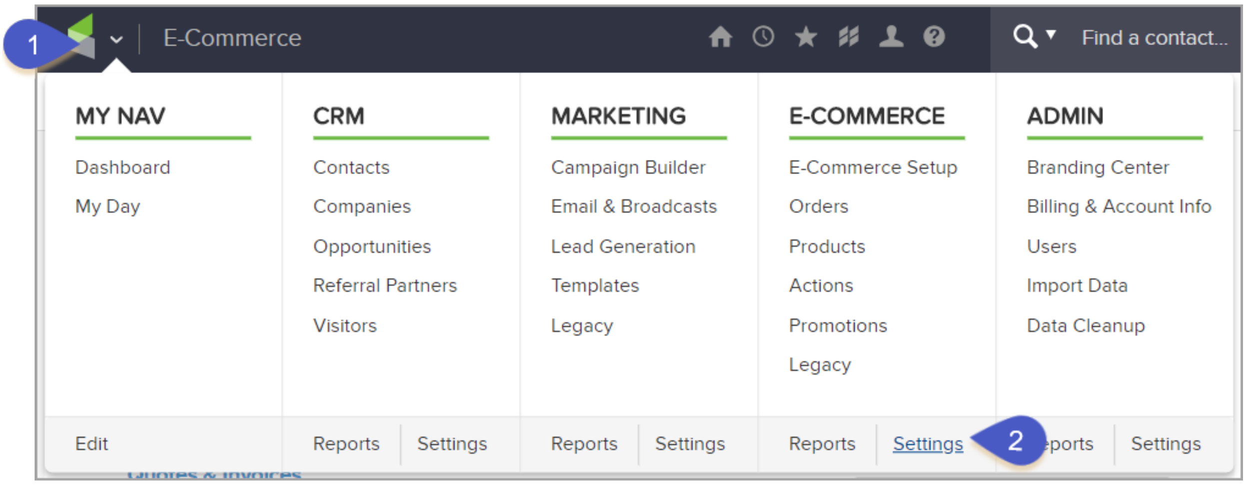
The default order invoice is very basic. It displays a standard black and white layout with your company logo. If you want to customize the type of information displayed in the invoice or modify the layout or table colors, you will need to create a custom order invoice. You can set up multiple custom invoice templates; however, at any given time you can only have one default selected for orders and one for subscriptions. These custom invoices will be sent to customers when:

- An Infusionsoft user creates a manual order and chooses to send an invoice immediately.
- A successful payment is made through the shopping cart, through an autocharge, or recorded manually (if enabled through E-Commerce > Settings > Orders.)
- An Infusionsoft user sends an invoice manually from an order record upon request after purchase.

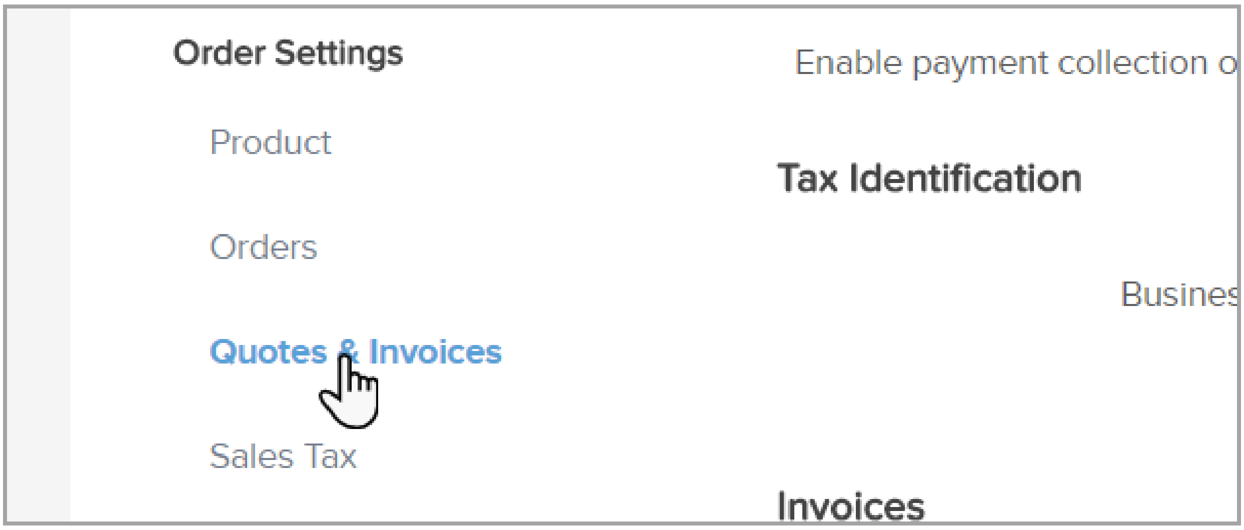
The following tutorial is for applications that have the option to 'Enable payment collection on Invoices', turned off.

Setup Legacy Invoice Template

Go to **E-Commerce > Settings**

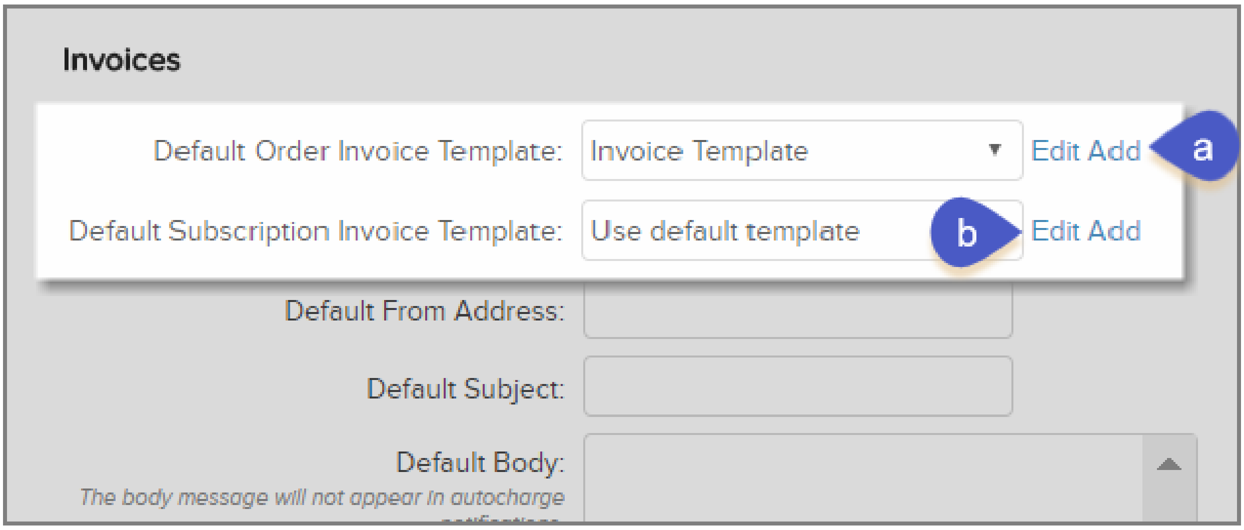


Click on **Quotes & Invoices** in the *Orders Settings* menu.



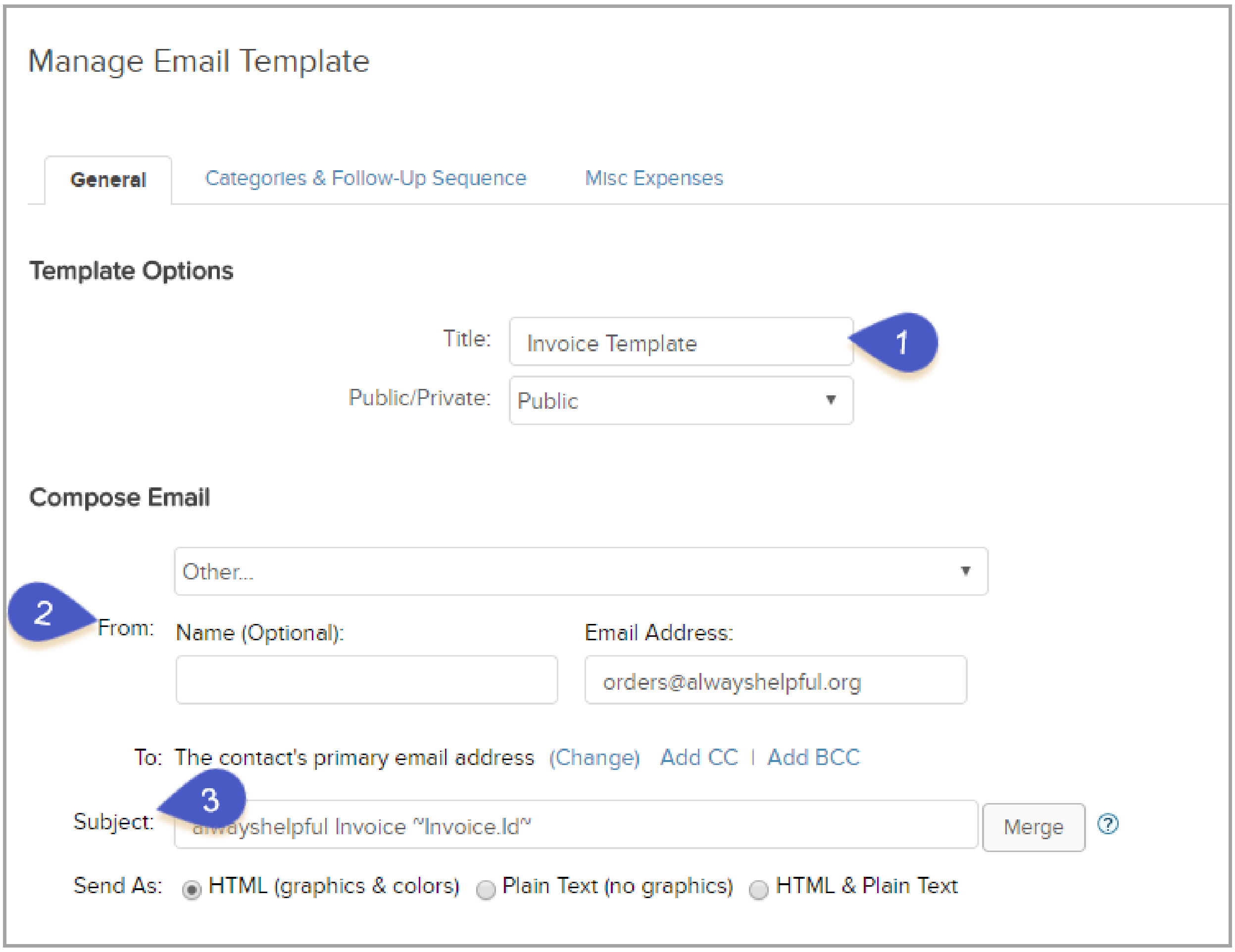
Under Invoices

- Click **Add** to create a new order invoice or subscription invoice template.
- Click the **Edit** to customize the invoice.

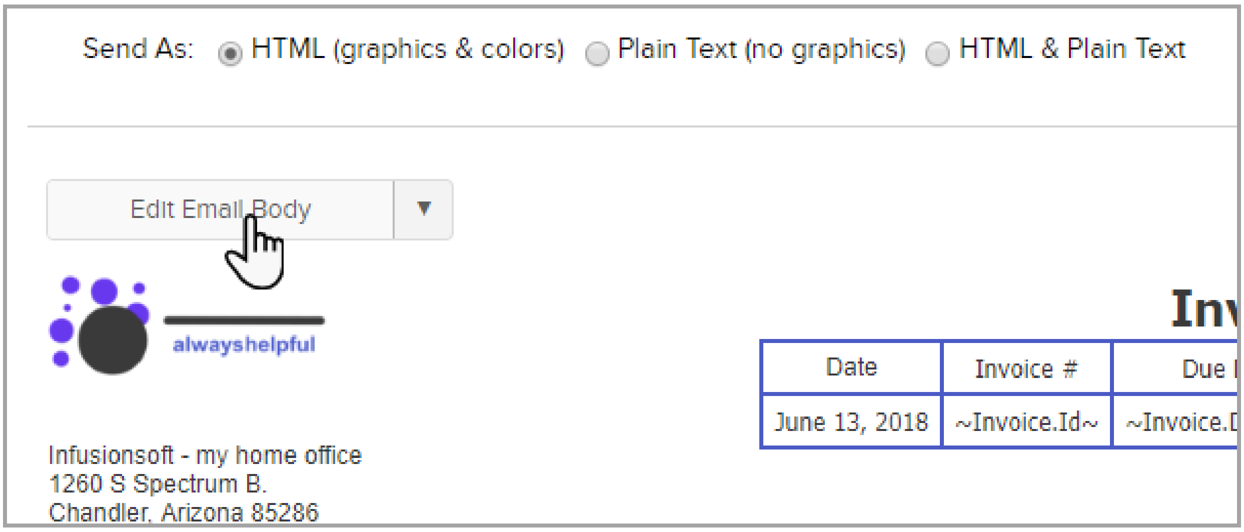


A window will pop-up (make sure you have no pop-up blockers enabled through your browser)

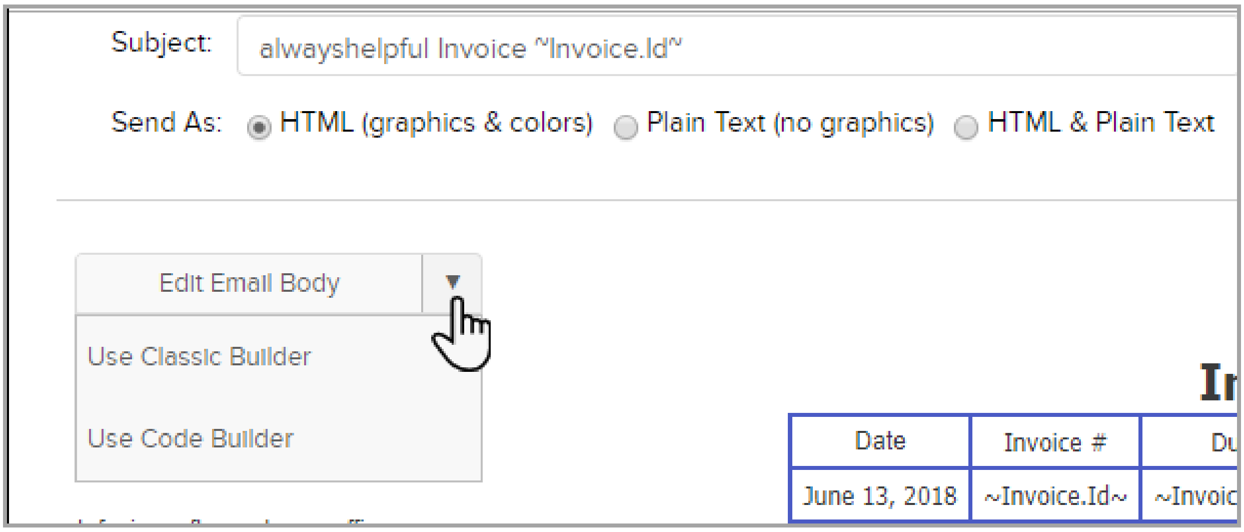
Add a *Title*, *From Email Address*, and *Subject Line*.



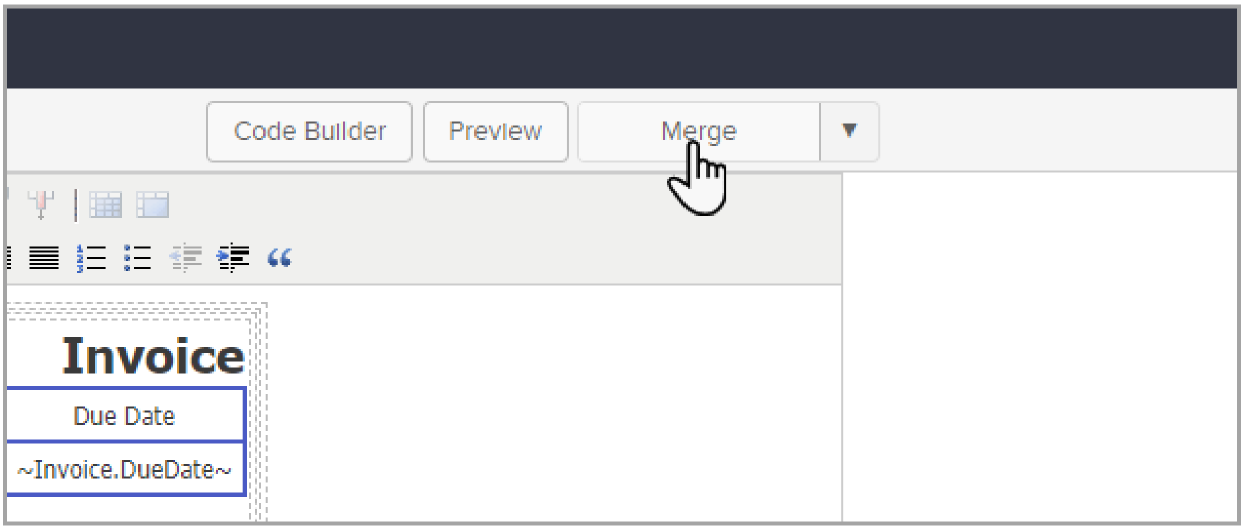
Click on the **Edit Email Body**



or click on the arrow to choose to build the email in either the classic WYSIWYG editor or the Code Builder.

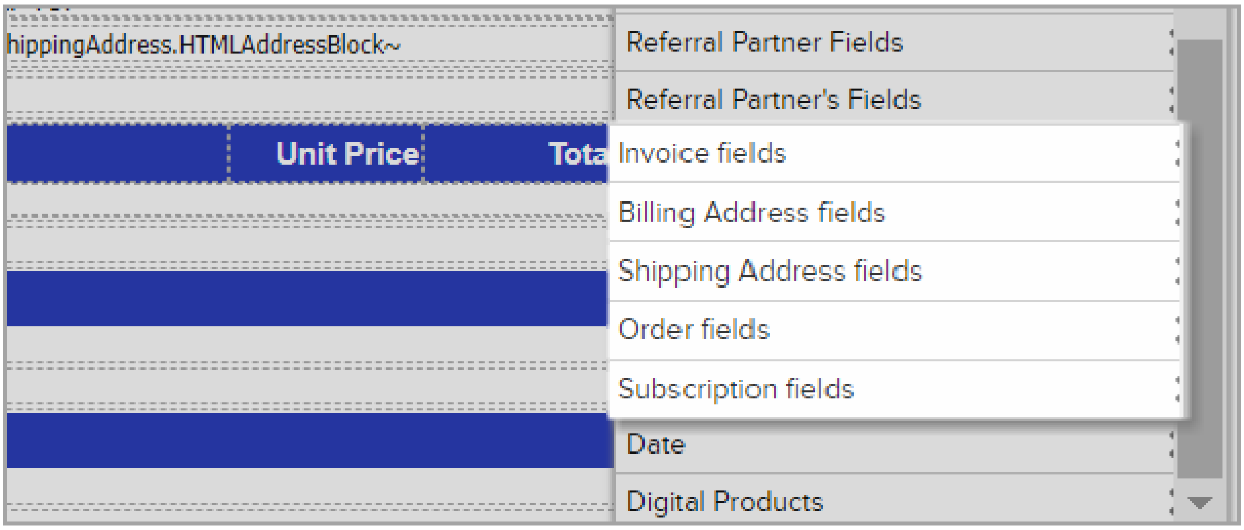


To merge custom fields into the email, click on the **Merge** button.

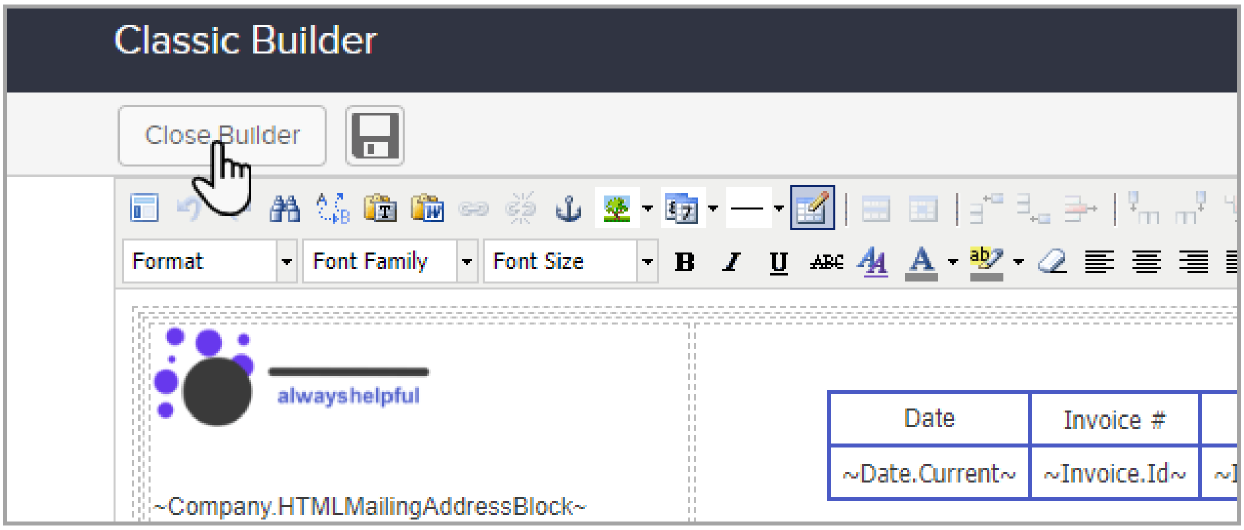


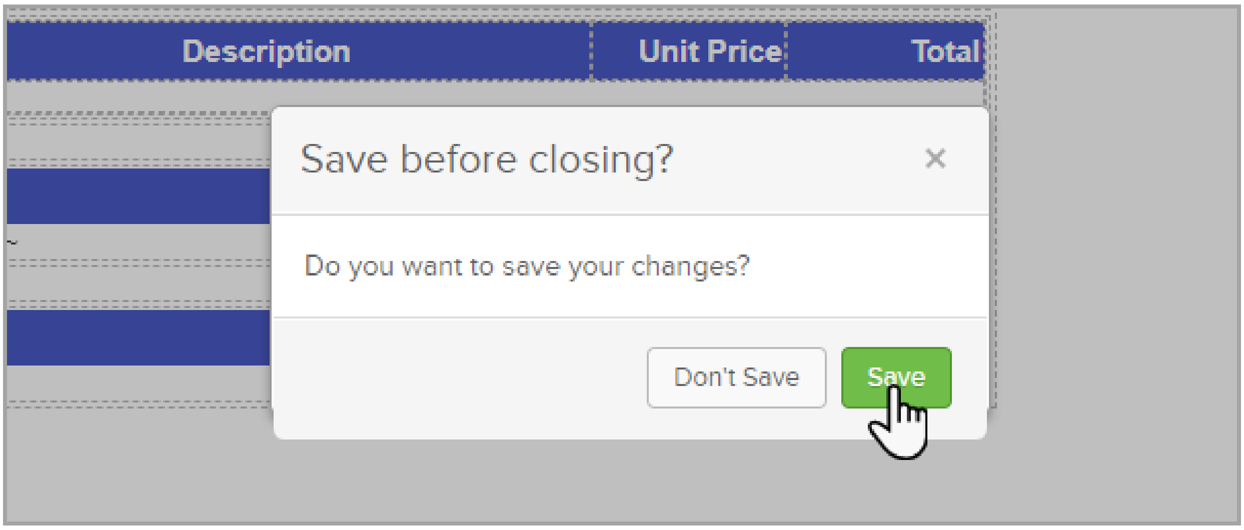
Some common fields include:

- Invoice Fields
- Billing and Shipping Address Fields
- Order and Subscription Fields

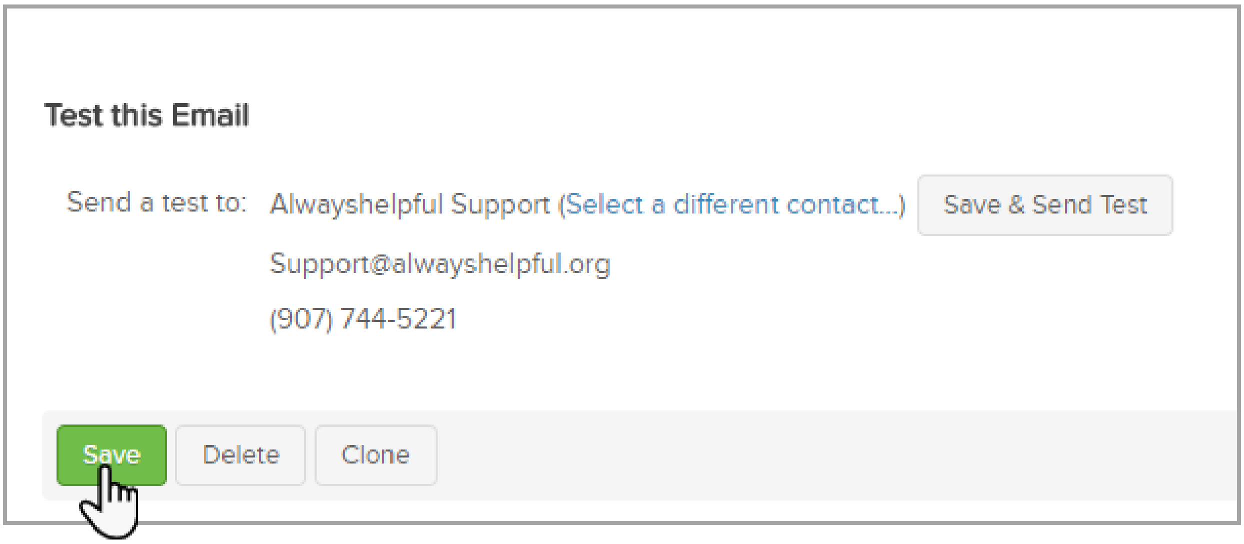


Click on the **Save** icon and then click the **Close Builder** button.



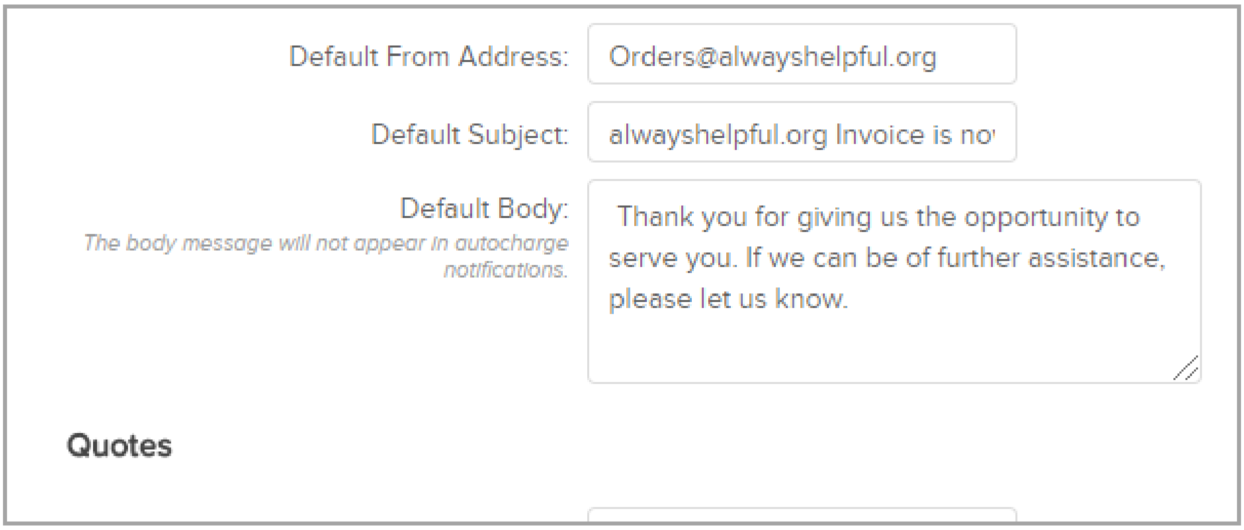


Scroll down and **Save** your changes



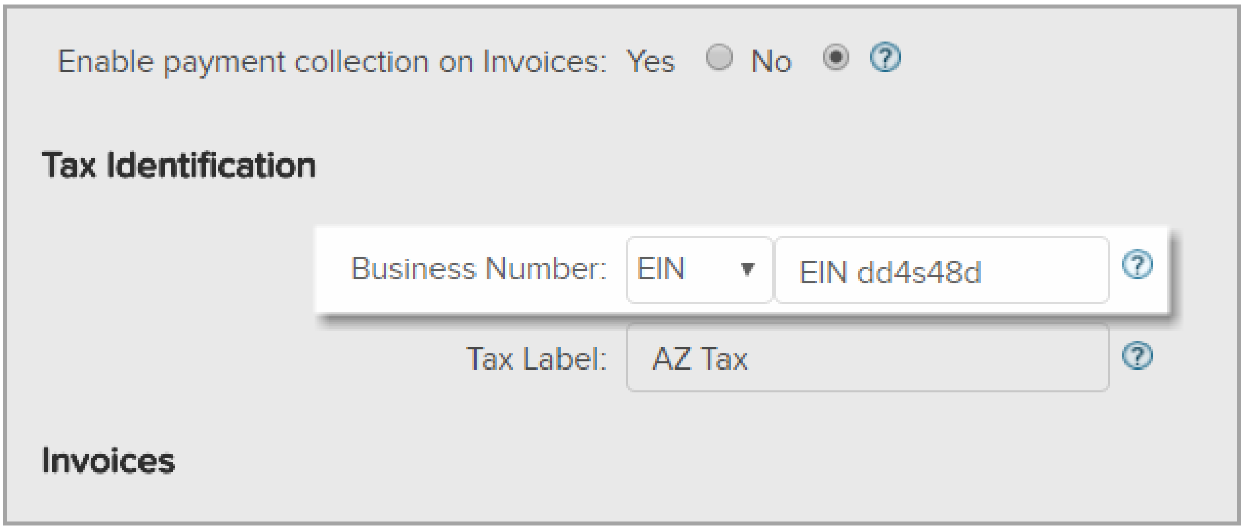
Set up Other **Defaults**

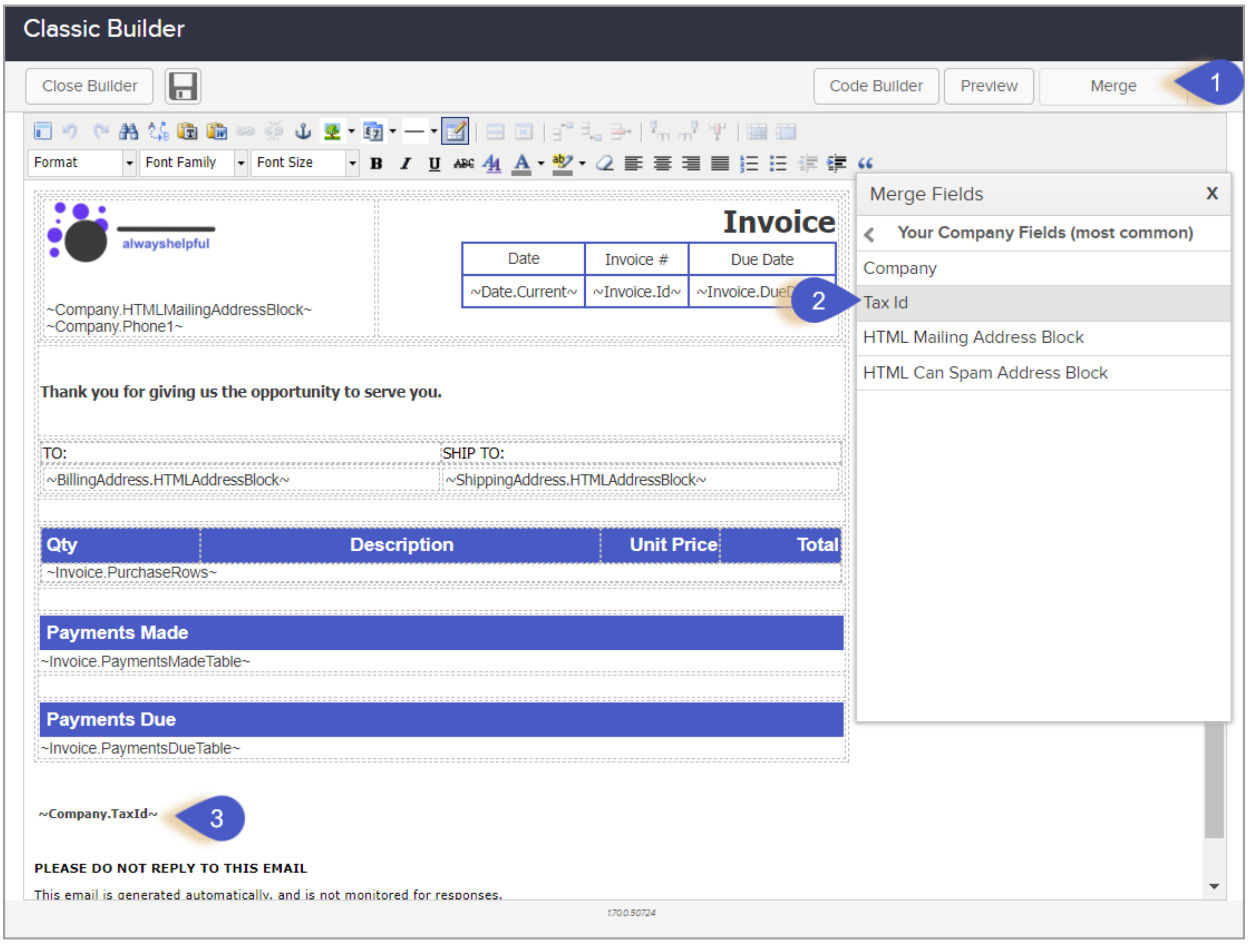
From Address, Email Subject, and Email Body: Enter these default email settings for invoices sent from an order record. You can also customize this information as you go through the process of sending an invoice.



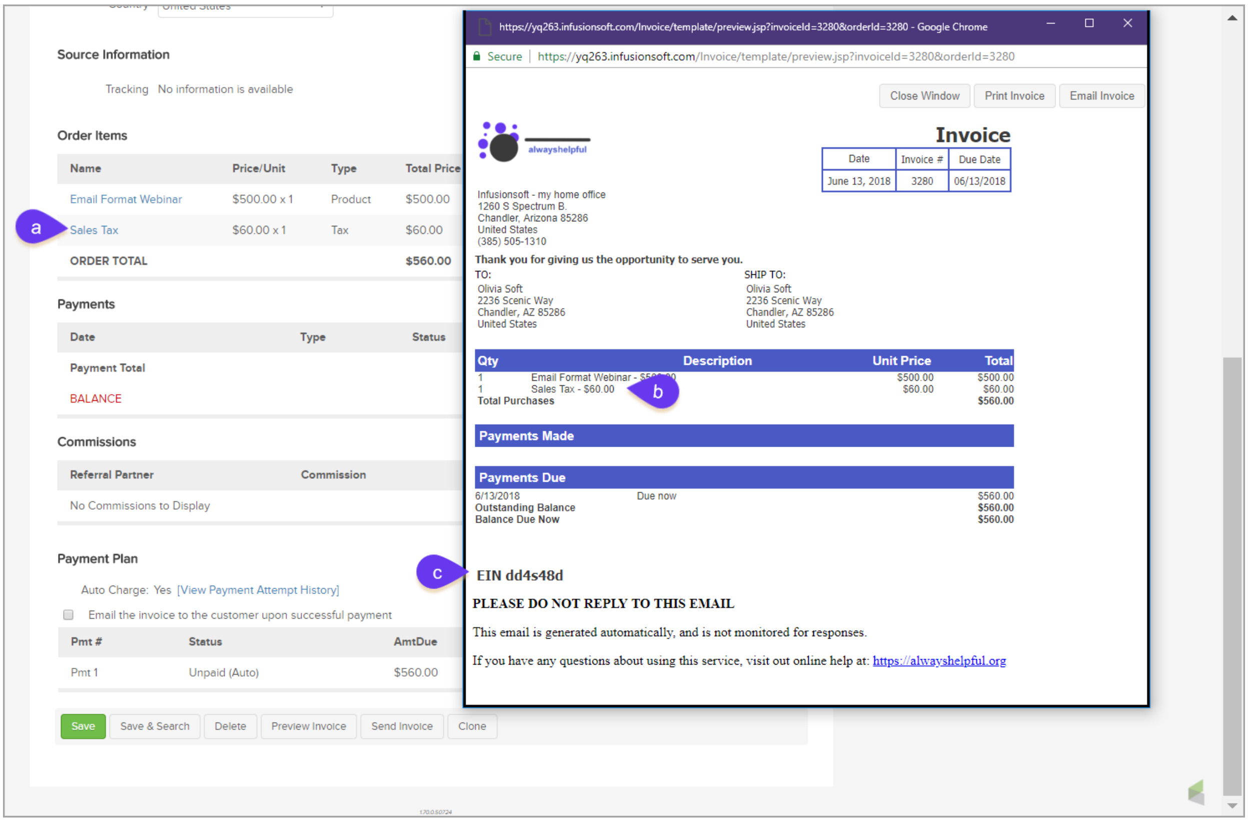
Enter a Tax ID Number to Merge Into Invoices

1. Enter you **Business number**
   - This field is available from the "Your Company Fields (most common) Merge Fields in a custom invoice template.
   - The "tax type options" will only display with "Enable payment collection on Invoices". To display the tax type enter it with the Business Number.





2. Tax Label - This is only used with the "Enable payment collection on Invoices"



Manually Send an Invoice

Click here for detailed information

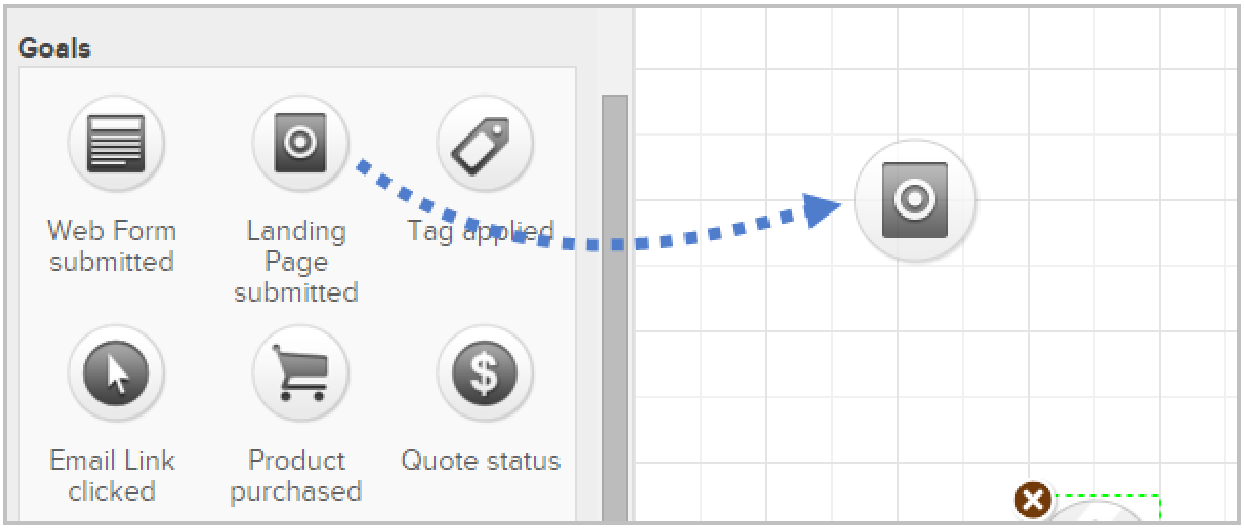
Using a different version of Infusionsoft? Click Here to learn more

Legacy Landing Page Builder

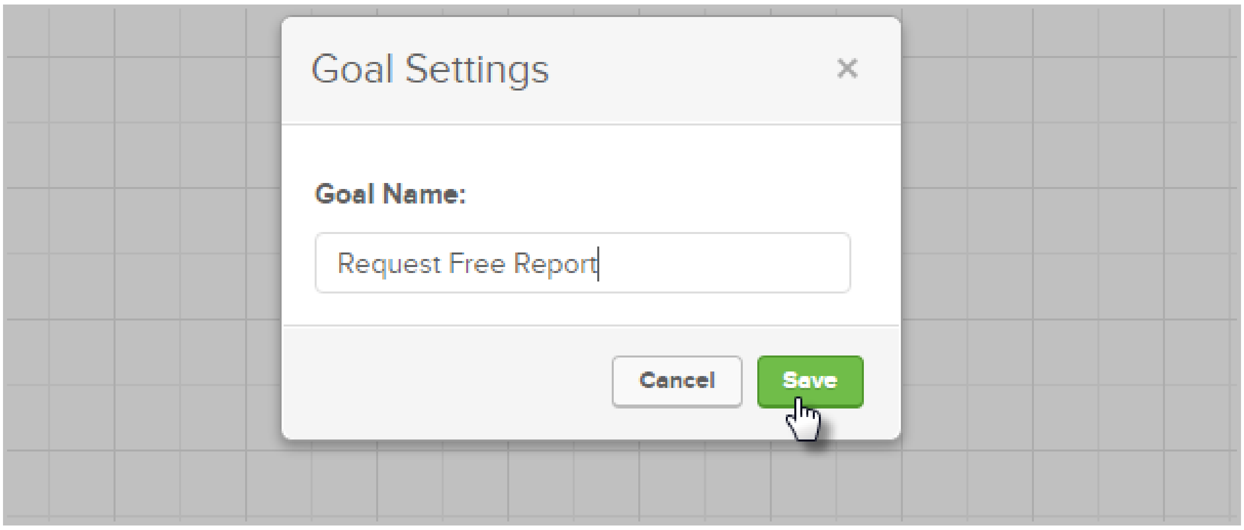
Last Modified on 07/23/2018 12:00 pm MST

A landing page is an Infusionsoft hosted web page with a built in web form that can be designed and launched quickly without the help of a webmaster. You can create a multi-column landing page layout and include text, images, and videos in the content. Landing pages are more robust than hosted web forms. Contacts usually fill out the form on a landing page, but they can also be used as data entry pages for an outsourced call center or contractor. Each landing page can only be assigned to one campaign goal. A landing page will auto-saved every 30 seconds so you can work with confidence.

1. Drag and drop a campaign goal onto the campaign builder canvas.



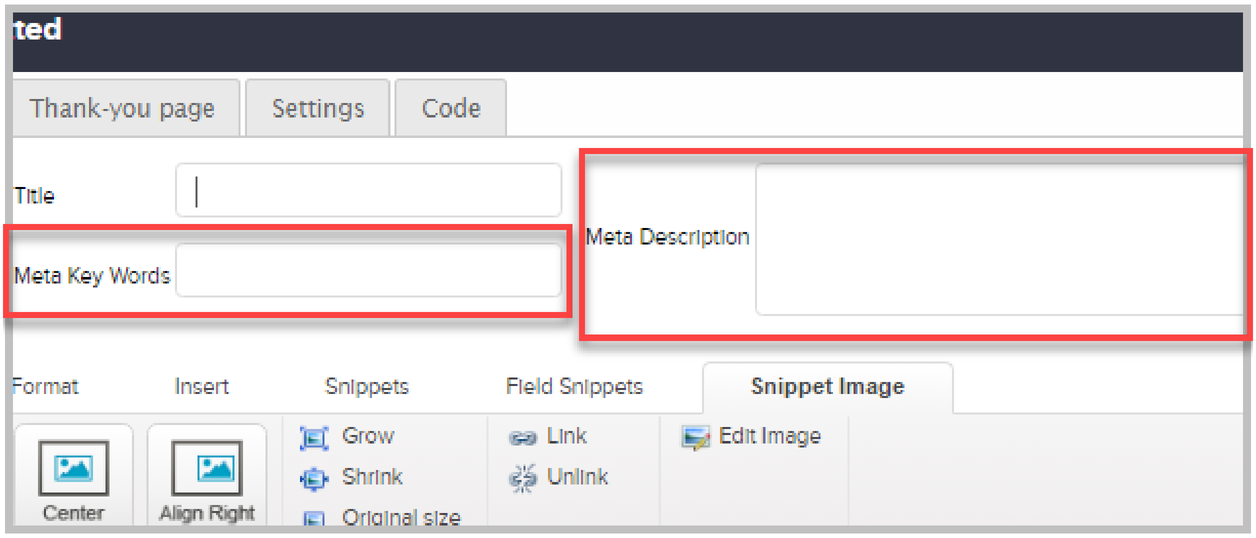
2. Name the goal and click **Save**



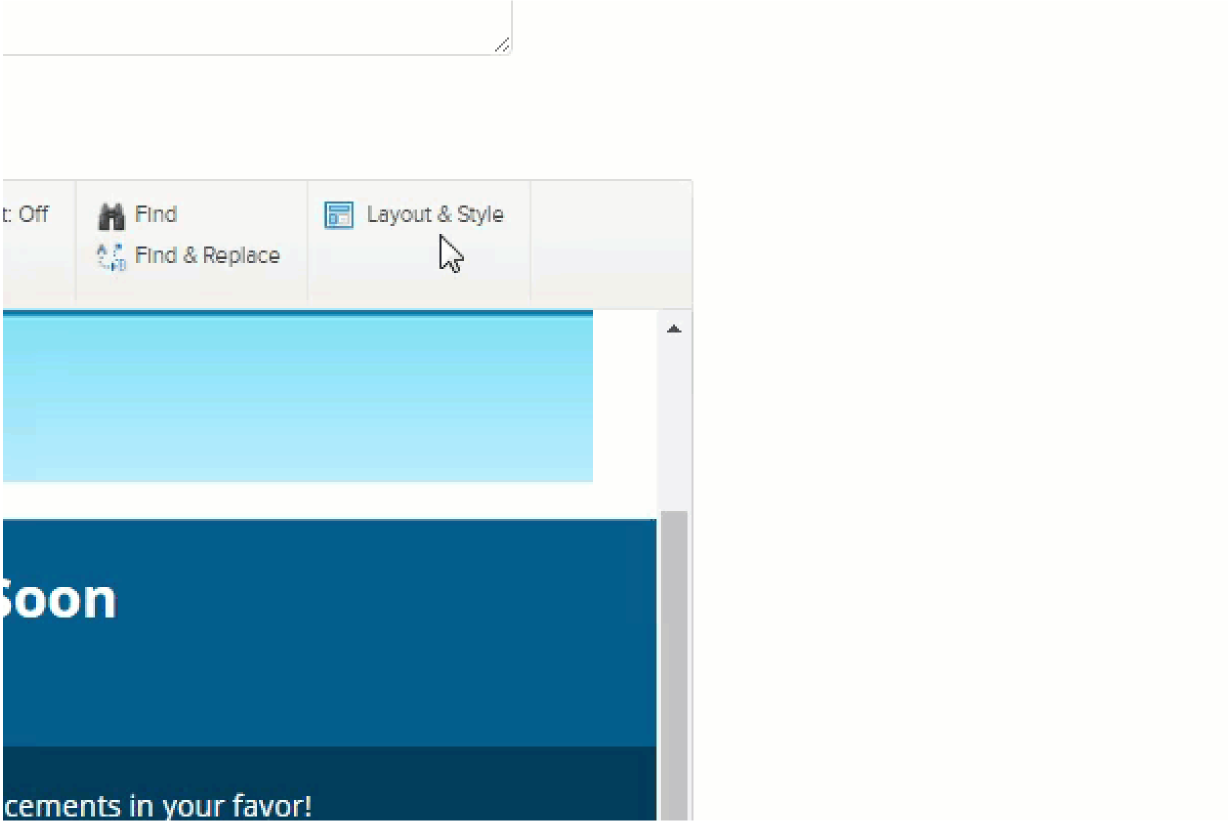
3. Double-click the goal to set up the landing page.

Pro Tip! If you've already created a landing page, you have the option to copy it and use it as a starting point. Click on the Landing Page button and select Copy from Campaign. Select the campaign name and then select a specific landing page from that campaign. If you do not see a landing page listed, you may need to publish the campaign before proceeding.

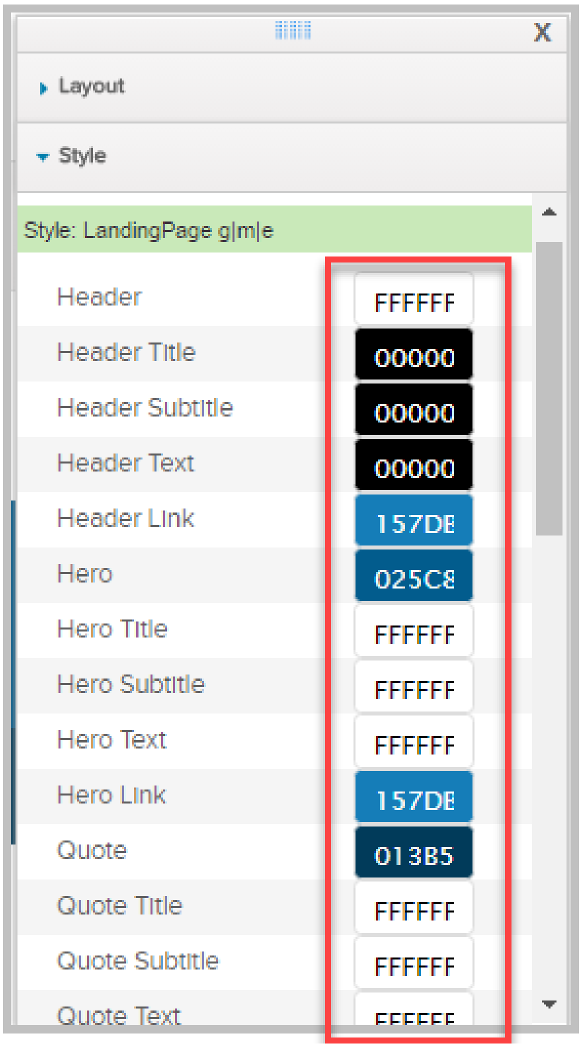
4. Enter the landing page meta data. This information is used to optimize the landing page's search engine effectiveness. It describes the content of the page and makes it easier to find from a search engine. The meta key words are invisible, but the title and meta description display in the search results.



5. Click on Layout & Style in the landing page toolbar to create or select a custom style. The style defines the font and background colors used throughout the landing page. The layout allows you to add or remove the header, footer, or sidebars, adjust page widths, customize form field position and size, and more. If you haven't created a custom landing page style, click on Edit on one of the standard styles and customize it using one of the following options.

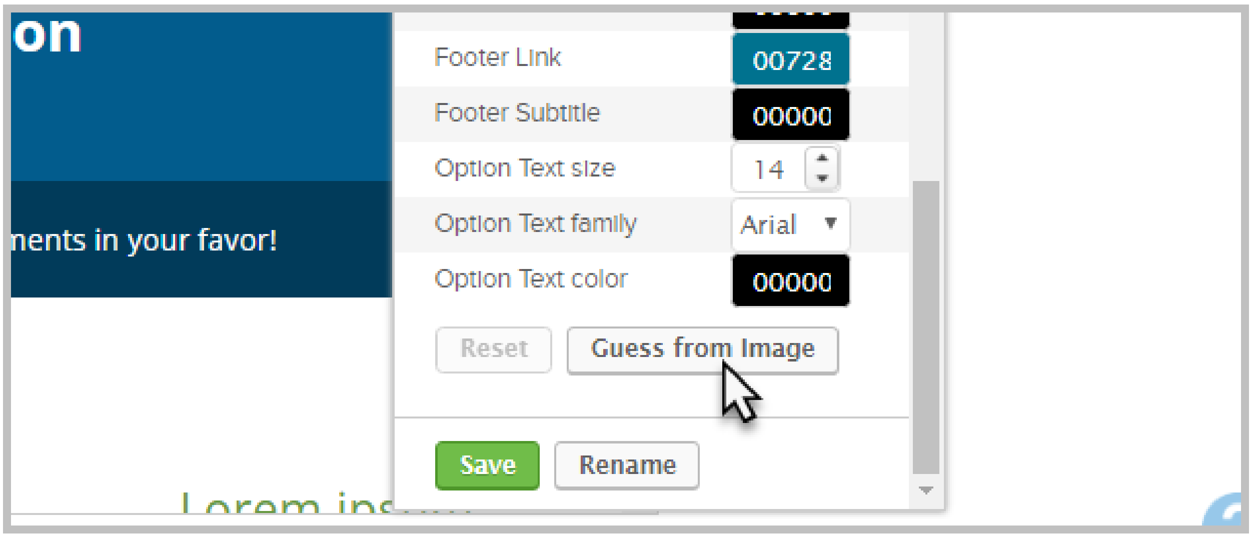


6. Enter the hexidecimal color codes for your company colors. You can obtain these from your graphic designer. Click into a color field to select a color from a color chart or use the eyedropper tool to select a color from a landing page image.



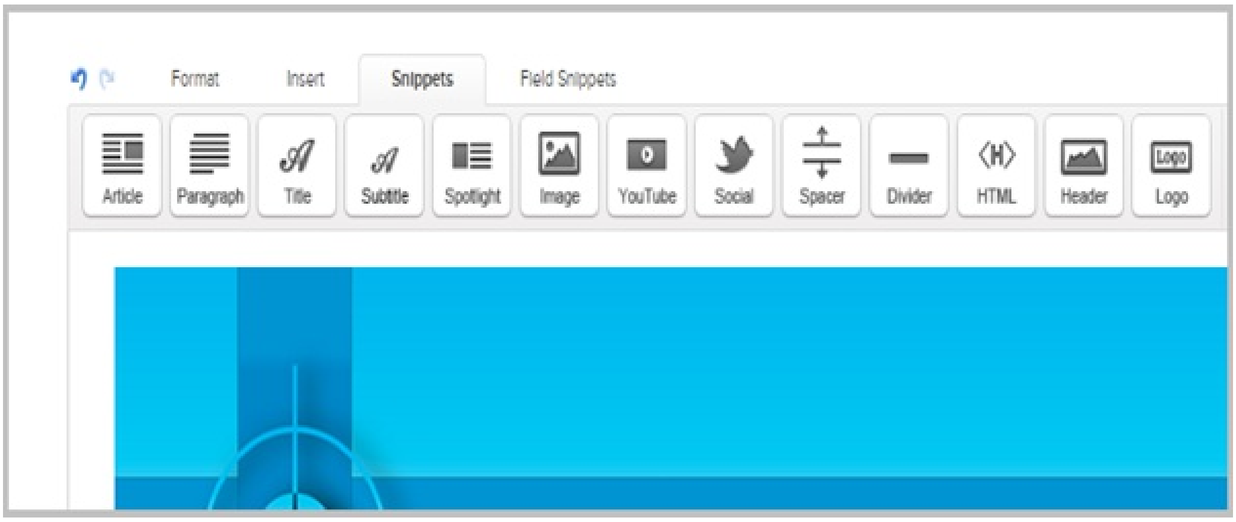
7. Click on your custom banner image, and then click on Guess from Image in the style menu.

> Pro Tip! Each time you click on Guess from Image, the system will analyze the header and suggest a possible style.

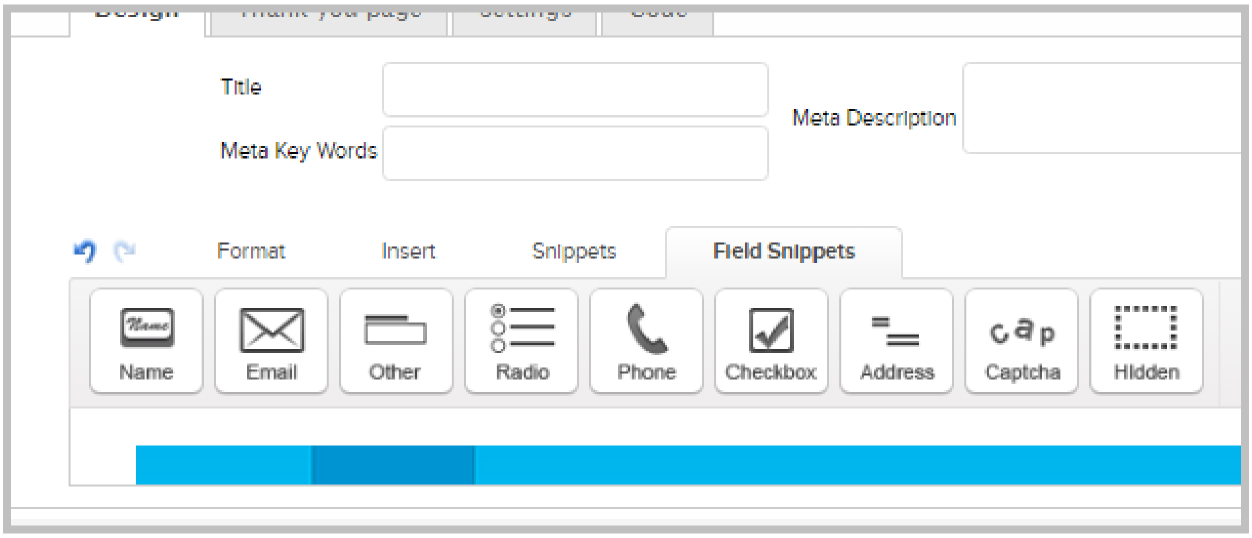


8. When you like the style, click on Save to give the style a name and save it for future use in other landing pages.

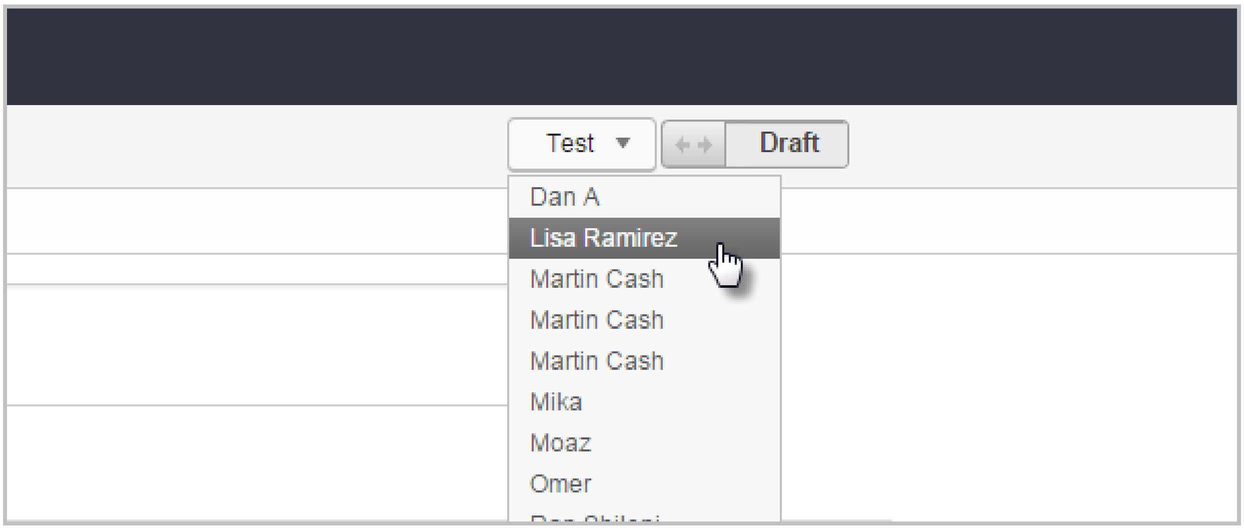
9. (Optional) Add more page content (images, paragraphs, titles, etc.) using the content snippets.



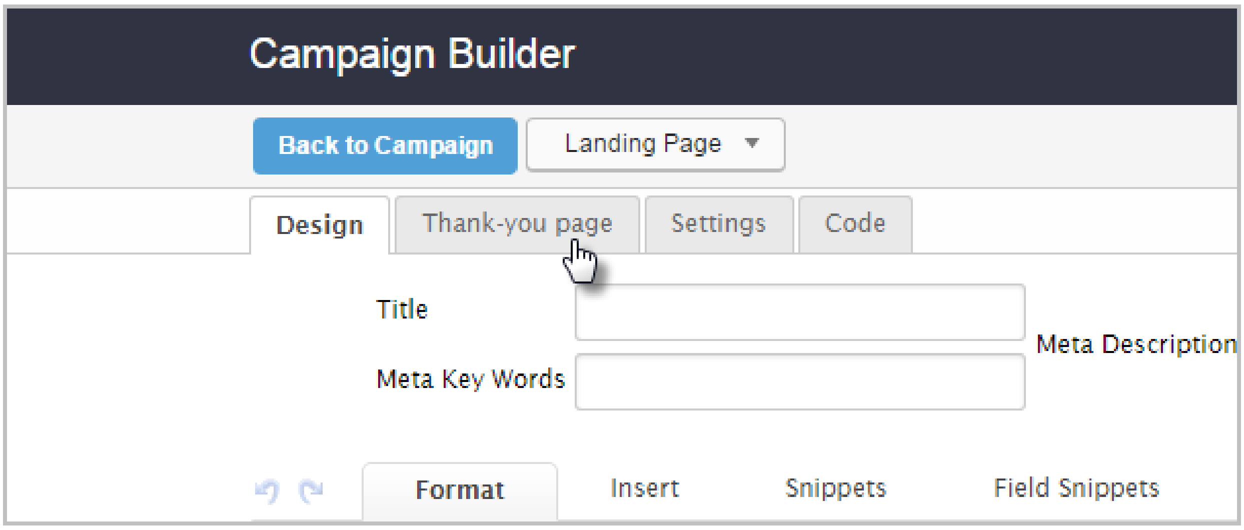
10. (Optional) Customize the form fields by adding or removing field snippets



11. Click on the Test button to preview the landing page as you customize the design and make changes to it.

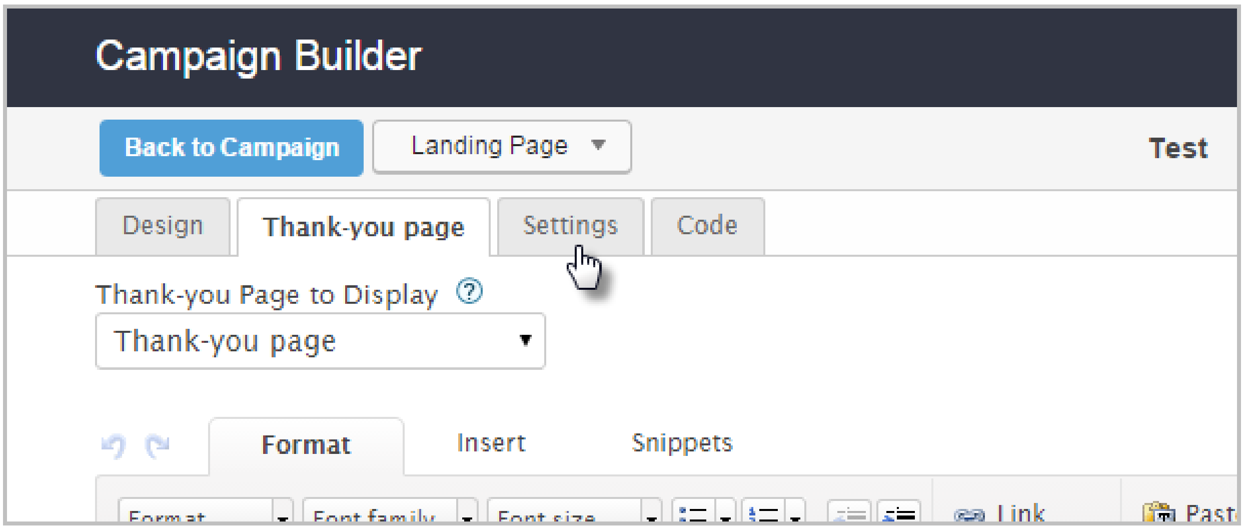


12. Click on the Thank-you page tab to customize the hosted thank-you page. Header (600 x 100 pixels), snippets, layout, and style, or enter select A Custom Website URL from the drop-down to enter the URL for an existing website.

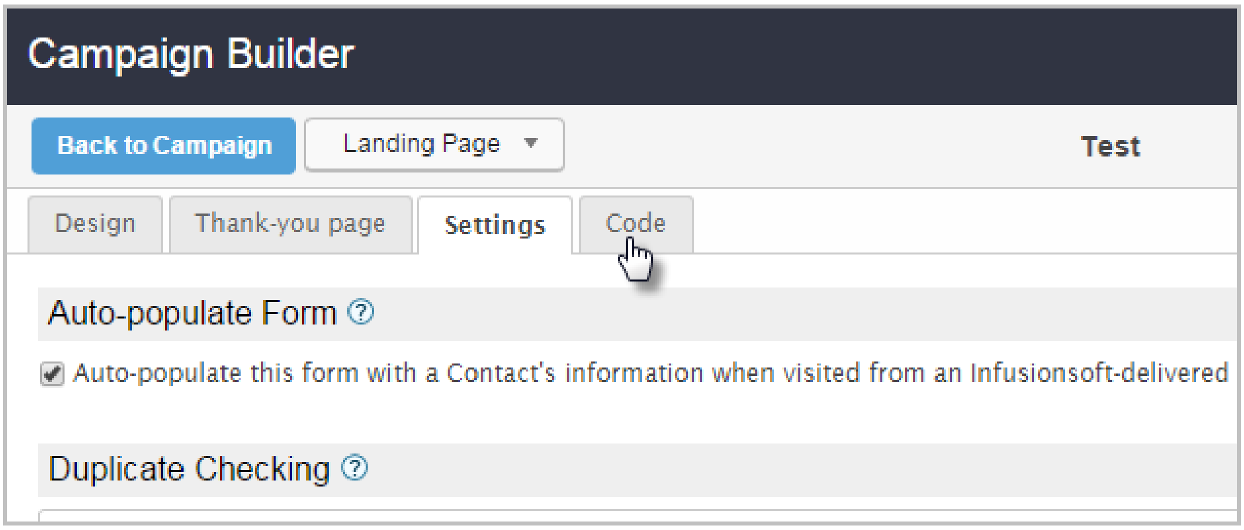


13. (Optional) If you use the Infusionsoft thank-you page, you can insert merge fields to personalize the thank you page. It will insert personal information that exists in an Infusionsoft contact record, like a name or company name into the thank-you page text. To merge more information onto the page, just insert a merge field into the body of the Thank you page.

14. Click on the **Settings** tab to select a method of identifying duplicates and set up a notification email. The notification email is sent each time someone fills out the landing page web form.



15. Click on the **Code** tab to choose a method of using the landing page.

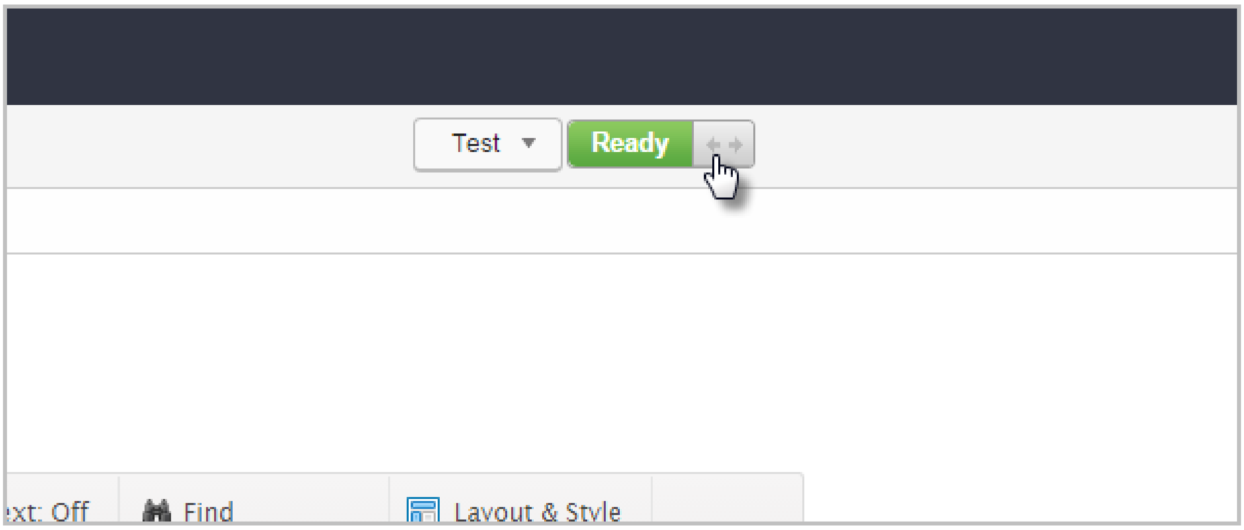


We recommend you use the hosted version and/or share the landing page with your network.

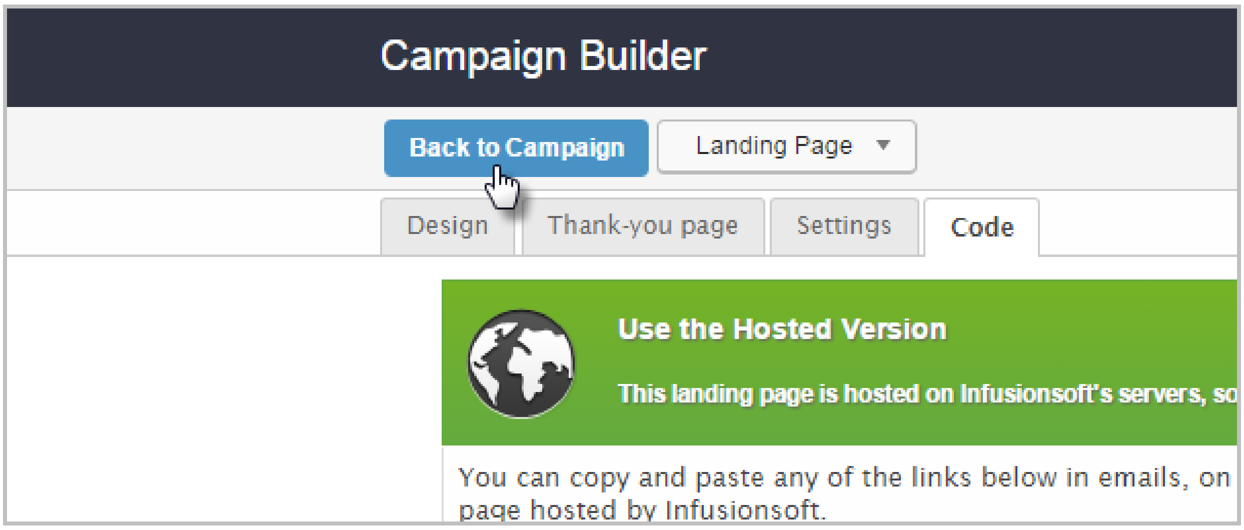
- **Do It Yourself or Have Your Webmaster Do It**: These options allow you to host the landing page on your own domain.
- **Use the Hosted Version**: Copy the landing page URL or create a custom URL to link

this page to a paid ad (Google / Facebook PPC), to a blog article, or use send it by email. Note: The custom URL will no longer work if you edit it again. Choose a custom URL that you can use permanently.
  - **Share This with Your Network:** Use this option to publish the landing page link to your social followers.

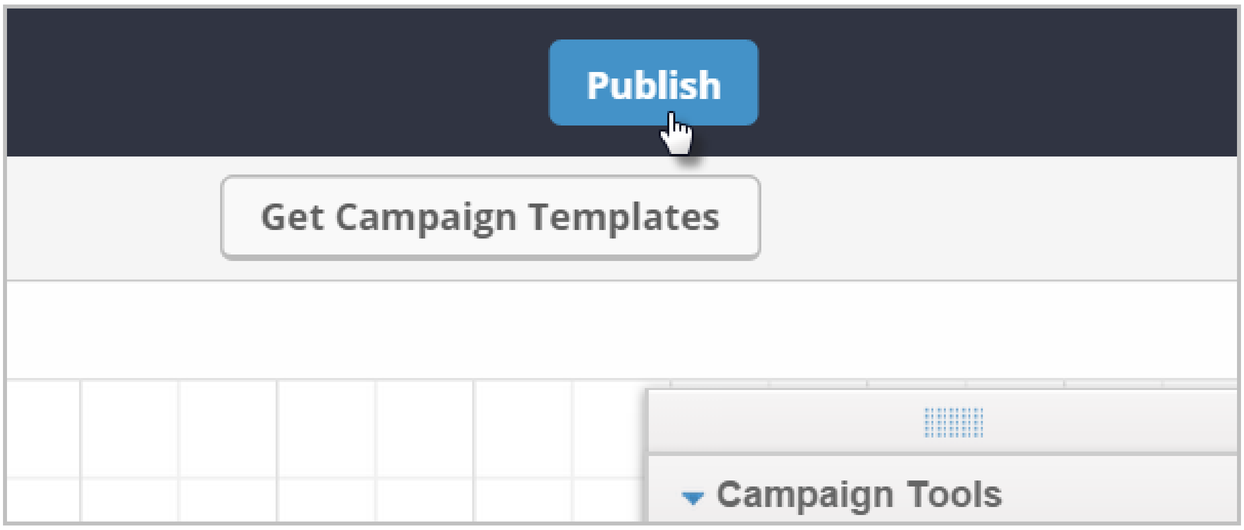
16. When you finish customizing and testing the landing page, toggle the status from Draft to **Ready**.



17. Click on the **Back to Campaign** button.



18. Publish your changes.


Publish
Get Campaign Templates
Campaign Tools

Using a different version of Infusionsoft? Click Here to learn more

Set Up Third Party Fulfillment Notifications

Last Modified on 07/23/2018 12:01 pm MST

Legacy Warning! While a Fulfillment Report automates fulfillment when an order is placed, fulfillment templates can be created as part of legacy automation and can also be imported into a campaign sequence in the campaign builder. If you plan on creating a fulfillment list for use in the campaign builder, it is better to set it up on the fly when creating the campaign. The procedures outlined below are typically only relevant to customers that utilize pre-campaign builder automation.

There are two types of fulfillment templates that you can create:

- **Fulfillment List** - An email with an attached spreadsheet (csv file) listing the contact information of those individuals who need something mailed to them. This is the most common type of fulfillment. The email with attachment is sent to a fulfillment company for processing.
- **Queued fulfillment List** - Instead of an email, this would simply be a "job" on an Infusionsoft user's dashboard. Only someone with an Infusionsoft user account would have access to this job.

Fulfillment List Templates

Choose this when you use a third-party fulfillment company to process the mailing. By "third-party" we mean anyone who does not have access to your Infusionsoft application, even if that person is your employee. The fulfillment list template sends the responsible party an email with the attachments needed to process the job. The attachments include a spreadsheet list of the contacts who are to receive the mailing and may also include a PDF, a Word document, or other files needed to process the job.

When you use a fulfillment list template, you will create a queue and control notification frequency through a follow-up sequence (legacy feature) schedule:

- **Daily** - Use the Global Follow-Up Sequence scheduling options to select the time of day (Eastern Standard Time) that you want ALL fulfillment list template to trigger. People will queue on the list until the specified time(s) of day. When the time arrives, the system sends the fulfillment list to the responsible party and begin queuing a new list.
- **Weekly or Monthly** - Use a combination of the Global Follow-Up Sequence scheduling options AND the X Days After A Person is Added to This Follow-Up Sequence step scheduling option (with Rounding) to send the notifications on a specific day of the week (e.g. every Friday) or day of the month (e.g. 15th of the month). Note: If you need to send a list more than once a week or once a month, you will need to create a separate fulfillment list template for each day / date.

1. Go to **Marketing** > **Templates**
2. Select **Fulfillment List** as the template type
3. Enter a Title for the fulfillment list template. Note: The title is used to identify a fulfillment list template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    1. **Public**: Choose this to make the template accessible to other Infusionsoft users.
    2. **Private**: Choose this if you want to hide this template from other Infusionsoft users.
5. Enter the Fulfillment List Options.
    1. **Field List**: The fields listed on the left include all available standard and custom contact fields. The fields on the right are the fields to be included on the spreadsheet attached to the fulfillment job notification email. The fields on the right should include only the fields the responsible party needs to process the mailing. You can move the fields from one list to the other by clicking on the field name, and then using the arrow buttons to move the field to the left or right.
    2. **(Optional) Attachments**: Select or upload the additional attachments needed to process the mailing (e.g. cover letter.)
6. Enter the Processing Information.
    1. **Email Send To**: Enter or update the email address for the person responsible for completing this job.
    2. **Send to Contact's Owner**: Select Yes if you want to send internal notifications to contact owners when the job notification is sent.
    3. **Email Send From**: Enter the email address for the fulfillment supervisor from your company. This person should be able to answer the responsible party's questions about processing the job.
    4. **Email Subject**: Enter the subject line for the notification email. It is best practice to include your company's name or initials and a short job description (e.g. RDFP

Mailing Job: New Customer Welcome Gift.)
    5. **Email Body:** Enter more detailed processing instructions telling the responsible party what to send, including any special requests (e.g. hand address.)
7. Click on the **Save** button to create the fulfillment list template.
8. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign the template to a category. The categories are used to organize and filter templates.
9. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and the labor needed to send the mailing to each person.
10. Mark the template as **Ready** and click on the **Save** button to apply the updates.

Queued Fulfillment Template

Choose this when one of your Infusionsoft users is responsible for processing the mailing. The queued fulfillment template will queue up a job on the Fulfillment Job widget you've added to the responsible user's home page. The system automatically queues records within one "job" until the responsible user begins processing it. When a job is "picked up" by a user, the system starts a new job queue for the newer records. You can still use the global follow-up sequence schedule and / or the follow-up sequence step schedule to control the frequency of job creation, however, the system will queue the records for each job automatically.

You will create a queued fulfillment template through the Marketing > Templates or "on the fly" as you add a step to a follow-up sequence (legacy feature) or send a broadcast.

1. Go to **Marketing > Templates**
2. Select **Queued Fulfillment List** as the template type.
3. Enter a Title for the queued fulfillment list template. Note: The title is used to identify a queued fulfillment list template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    1. **Public**: Choose this to make the email template accessible to other Infusionsoft users.
    2. **Private**: Choose this if you want to hide this email template from other Infusionsoft users.
5. Enter the Queued Fulfillment List Options.
    1. **Field List:** The fields listed on the left include all available standard and custom contact fields. The fields on the right are the fields to be included on the spreadsheet attached to the fulfillment job on the user's dashboard. The fields on

   the right should include only the fields the user needs to process the mailing. You can move the fields from one list to the other by clicking on the field name, and then using the arrow buttons to move the field to the left or right.
2. **(Optional) Attachments**: Select or upload the additional attachments needed to process the mailing (e.g. cover letter.)

6. Enter the Processing Information
   1. **Assigned User**: Select the user who will be responsible for processing the mailing. This fulfillment job will show up in the fulfillment job widget on the user's dashboard.
   2. **Notify Subject**: Enter the subject line for the notification email (e.g. Mailing: Referral Request Postcards.)
   3. **Notify Body**: Enter more detailed processing instructions (e.g. use glossy postcards.)
7. Click on the **Save** button to create the queued fulfillment template.
8. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.
9. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and the labor needed to send the mailing to each person.
10. Mark the fulfillment template as **Ready** and click the **Save** button.

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Branding Center

Last Modified on 09/28/2018 12:11 pm MST

The Branding Center consolidates all your default templates, giving you an easy way to create and edit design styles from one place. Default templates include emails, forms, landing page s, thank you pages and direct mail pieces. You can also manage default logos and communication footers from here.

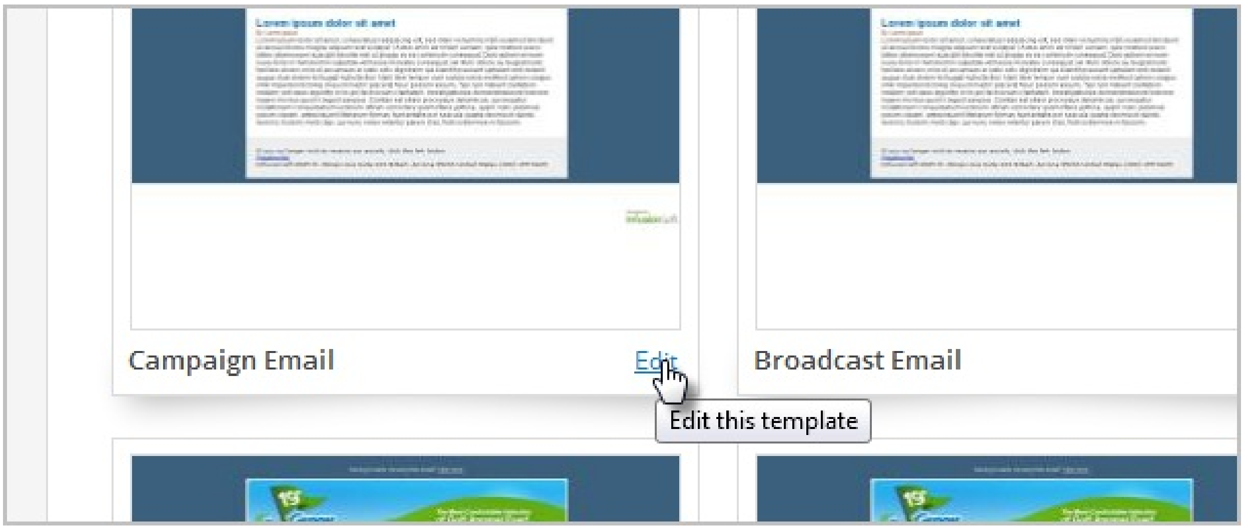
Default Templates

Legacy Notice: Campaign Email, Broadcast Email, Single Email, Follow-up Sequence Email, Template Library Email, Campaign Form, Legacy Form, Campaign Landing Page, and Campaign Letter are legacy features and can be ignored!

When style changes are made to the default template, they will be automatically applied to all of the communications associated with it, ensuring brand consistency and saving time. You no longer need to recreate a style for all of your marketing pieces. You can create and apply a single design style to all items that use the drag-and-drop builder, including emails, landing pages, forms and thank you pages. Every new account will come with a default style that can be edited to set fonts, colors, and more across all default templates (emails, landing pages, forms, etc) with one click. When editing a style, you can preview how your style changes will affect items currently using that style.To customize your default templates:

1. Go to **Infusionsoft** > **Branding Center**

2. Click **Edit** under the template you would like to customize (you can click the thumbnail image to get a larger preview)

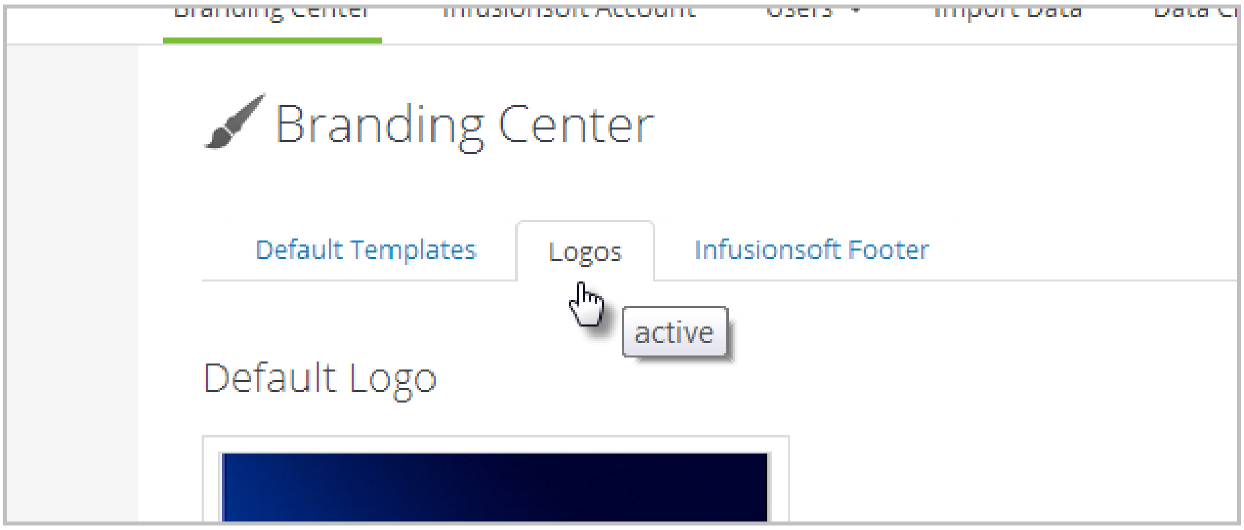


3. You will now be in the Email Builder.

Upload Company Logo

1. Go to **Infusionsoft** > **Branding Center**

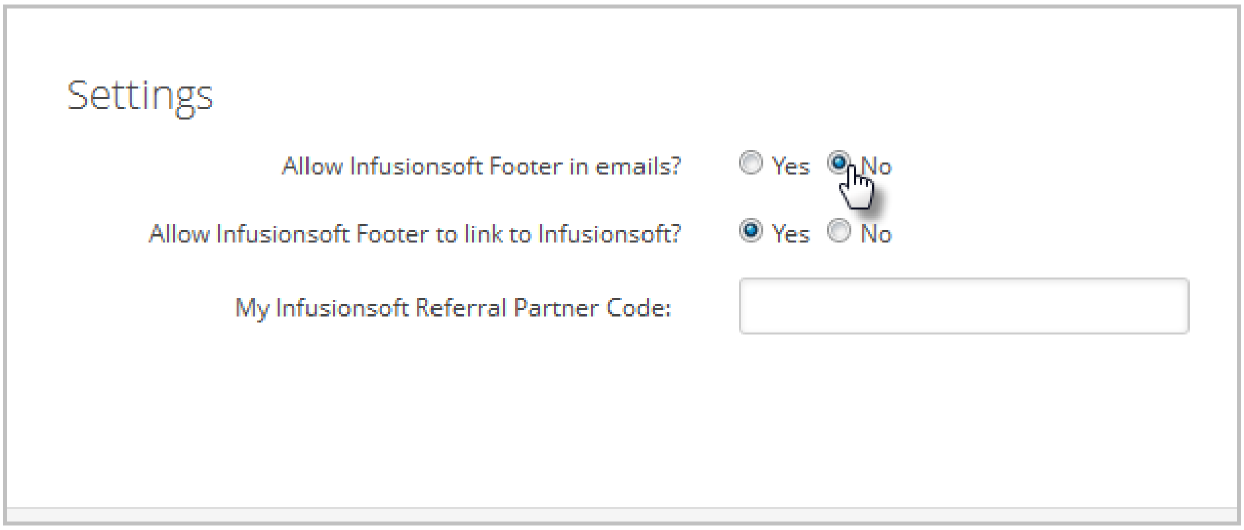
2. Click on the **Logo** Tab



- **Default Logo** - Your customers and prospects will see the master logo. It is displayed on invoices, digital product download pages, and opt-in/out confirmation pages.
- **Logo Snippet** - The logo snippet is available in the email and web form builders.
- **External Pages** - Displayed to your audience on opt-in/opt-out screens, invoices, and digital products.
- **Sign-in Pages** - Shown on the sign-in screen for your users and referral partners
- **Client Center** - Shown on pages your clients have logged into

Infusionsoft Footer

To disable Infusionsoft branding, scroll to the bottom of the page and click **No** next to the Allow Infusionsoft Footer in emails? option.



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Rest API Contact Region Location Update

Last Modified on 06/18/2018 9:21 am MST

Please Note! This change will go into effect on November 15, 2017.

The Infusionsoft API has been updated to receive either the ISO code or the full name value. The full name value for any ISO code that is passed to Infusionsoft is what will be stored to the database. This resolves an issue where the opposite value (ISO code or full name value was being stored when being passed to Infusionsoft

Example:

- Passing the region as the ISO code of "US-AZ" would result in the full name value of "Arizona" being saved.
- Passing the region as the full name value of "Arizona" would result in the ISO code of "US-AZ" being saved.

This change resolves the problem by always saving the full name value but accepting either format ("Arizona" will be saved if "US-AZ" or "Arizona" are passed to Infusionsoft). This will affect integrations that are providing Infusionsoft a region of "Arizona" and are expecting "US-AZ" to be returned.

Example:

- Passing the region as the ISO code of "US-AZ" would result in the full name value of "Arizona" being saved.
- Passing the region as a full name value of "Arizona" would result in the full name value of "Arizona" being saved.

These changes will affect any REST API calls which can return a contact location/region as well as the validation for any REST API calls.

Acceptance Criteria:

- Input, be literal (accept "Arizona", "US-AZ", "AZ")
- Output, stored information in the database.

Please review the Frequently Asked Questions below:

Will this affect me?

Most integrations will not be affected by this change. Less than 200 applications are using this call today, and the overwhelming majority of those applications are expecting the full name value to be returned.

How will I know if this change breaks my integration?

If an integration is being used that pulls the location/region/state/province field and the field stops being returned as it has in the past this change is probably the issue

How can I fix it?

The API has been changed to return the full name value of the ISO standard on the region. If the full name value is the expected response, this change will not cause a problem. For a list of ISO standard location regions, please reference https://en.wikipedia.org/wiki/ISO_3166-2.

It is suggested to contact the developer who created the integration.. If the creator of the integration isn't reachable it is suggested to contact an Infusionsoft Developer Partner here.

Why was this change made?

In an effort to standardize API outputs, Infusionsoft adopted a stricter standard on how we store things like location. This change was requested by many developers and maintains international standards.

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System Issue with GDPR Helper Campaign

Last Modified on 07/12/2018 11:10 am MST

We experienced a system issue between approximately 9:00am MST May 9th through 12:00pm MST May 21st, 2018 affecting the GDPR Helper Campaigndownloaded from the Marketplace. The GDPR Landing page s, GDPR Consent Landing Page, and Personal Information Request Landing Page, were not capturing contact details when submitted.

Your application has been identified as having downloaded the affected campaign. The campaign in question did not have any active contacts, but as a precautionary measure we have deleted the campaign from your application. This issue has been corrected and the updated campaign can be re-downloaded from the marketplace to ensure your forms are up to date with the latest code. If you have already downloaded the updated campaign, no further action is needed.

We apologize for any inconvenience this may have caused.

Using a different version of Infusionsoft? Click Here to learn more

System Issue with GDPR Helper Campaign

Last Modified on 07/12/2018 11:10 am MST

We experienced a system issue between approximately 9:00am MST, May 9th through 12:00pm MST, May 21st affecting the GDPR Helper Campaign downloaded from the Marketplace. **The GDPR Landing pages**, **GDPR Consent Landing Page**, and **Personal Information Request Landing Page** were not capturing contact details or achieving campaign goals when submitted.

Your application has been identified as having active contacts in the affected campaign. We were able to identify contacts that may have submitted one of the forms using your contacts' recent activity. The issue has been corrected and the updated campaign can be re-downloaded from the marketplace to ensure your forms are up to date with the latest code.

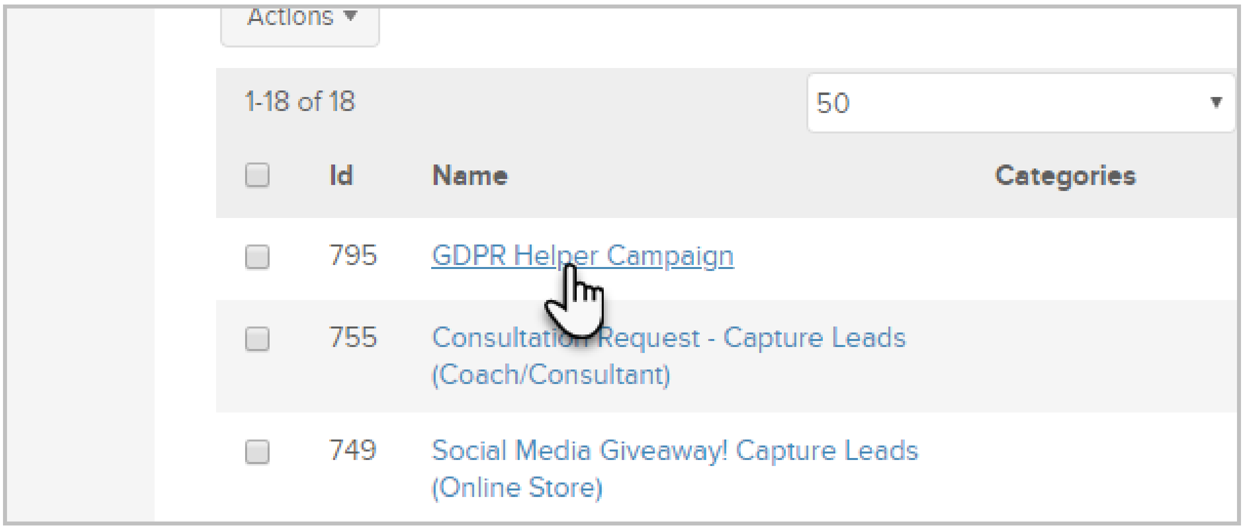
For the contacts that are currently in the broken campaign, we recommend adding them to the newly downloaded campaign. We have tagged the existing campaign with, **System ISSUE - GDPR Campaign Contacts.**

For the contacts that we have identified as potentially submitting information through the broken campaign, we recommend adding them to the **SYSTEM ISSUE - GDPR Contacts sequence** within the newly downloaded **GDPR Helper Campaign**. We have placed a sample apology email within the sequence and ask that your contacts re-submit the form.

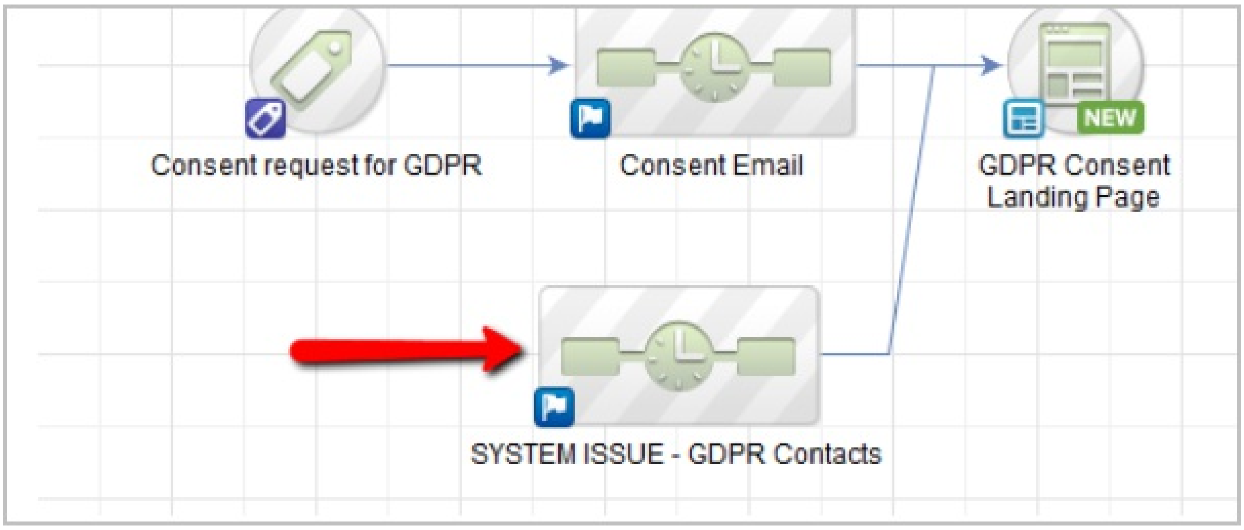
Please review the email and edit as needed.

Update the GDPR Helper Campaign

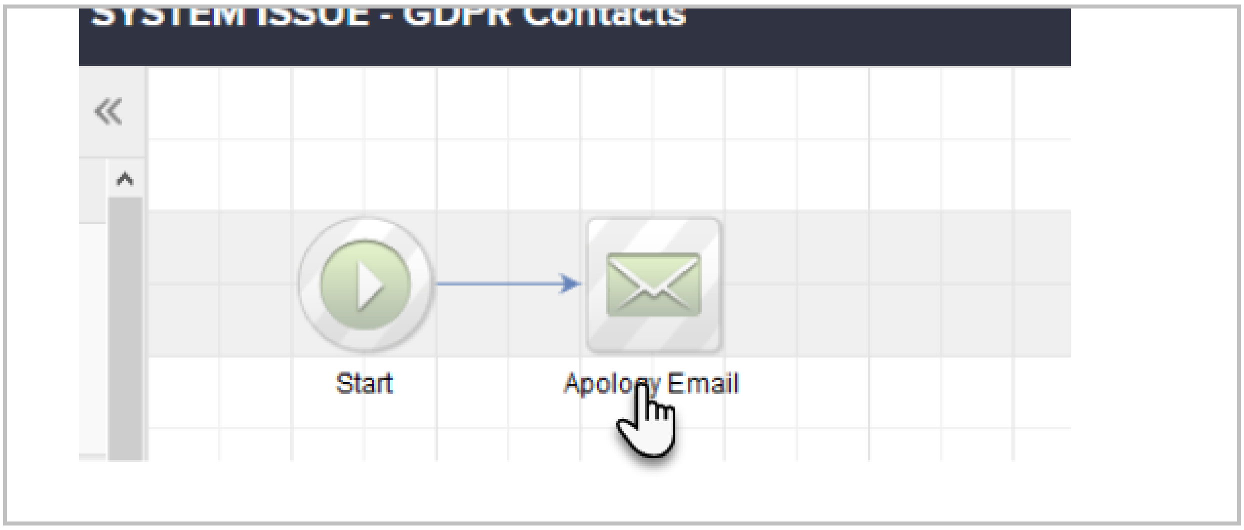
1. Open the **GDPR Helper Campaign**



2. Open the **SYSTEM ISSUE - GDPR Contacts sequence**

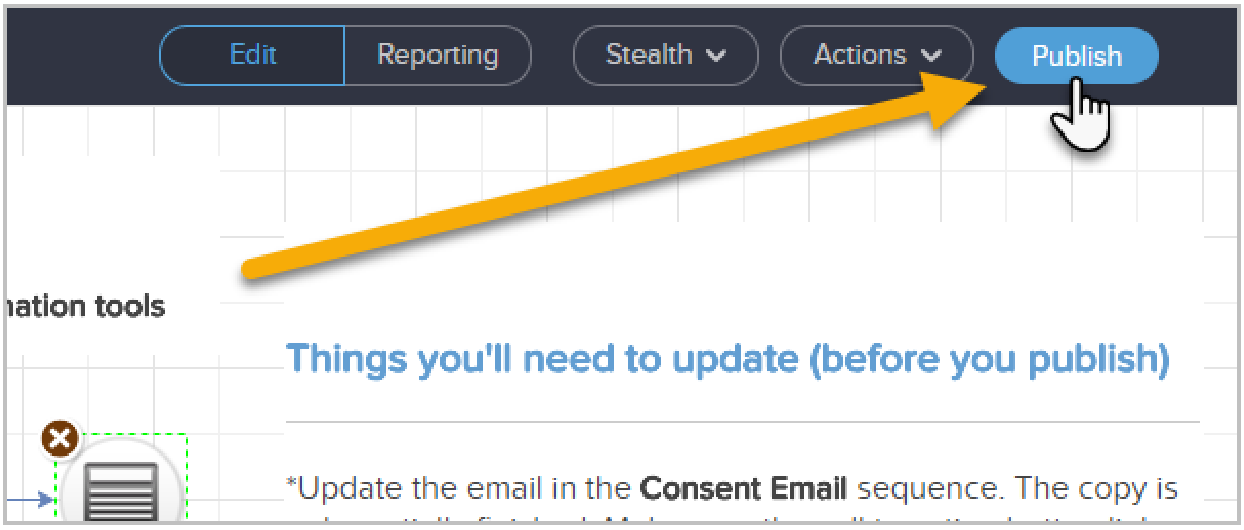


3. Open the **Apology Email**

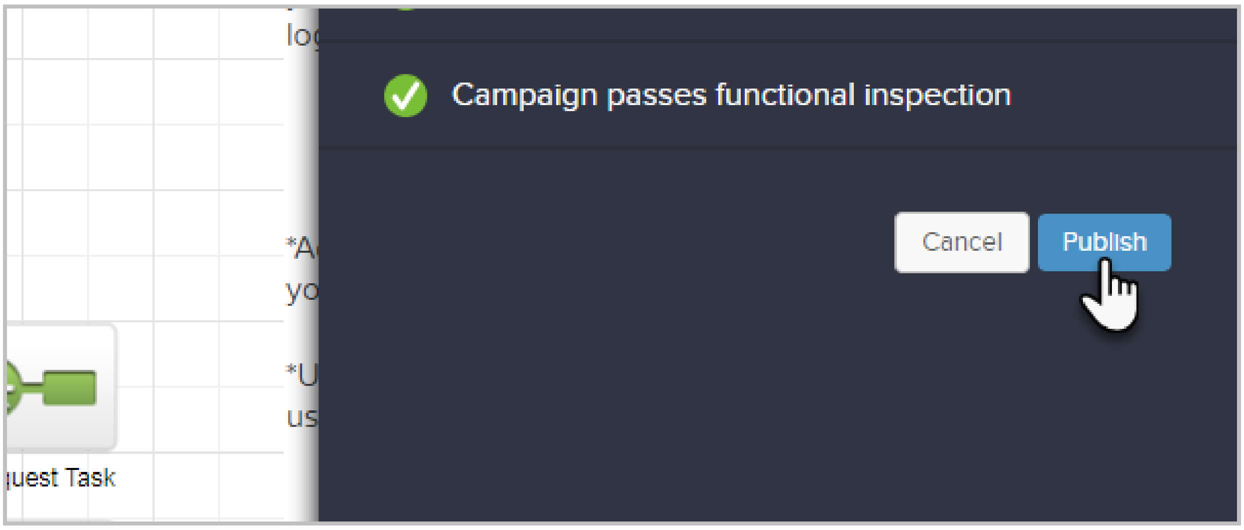


4. Make any verbiage changes you would like.

5. When you are finished editing, go back to the main campaign canvas and **republish** the campaign to make your changes live.



6. Click **Publish** again to confirm and update your campaign.

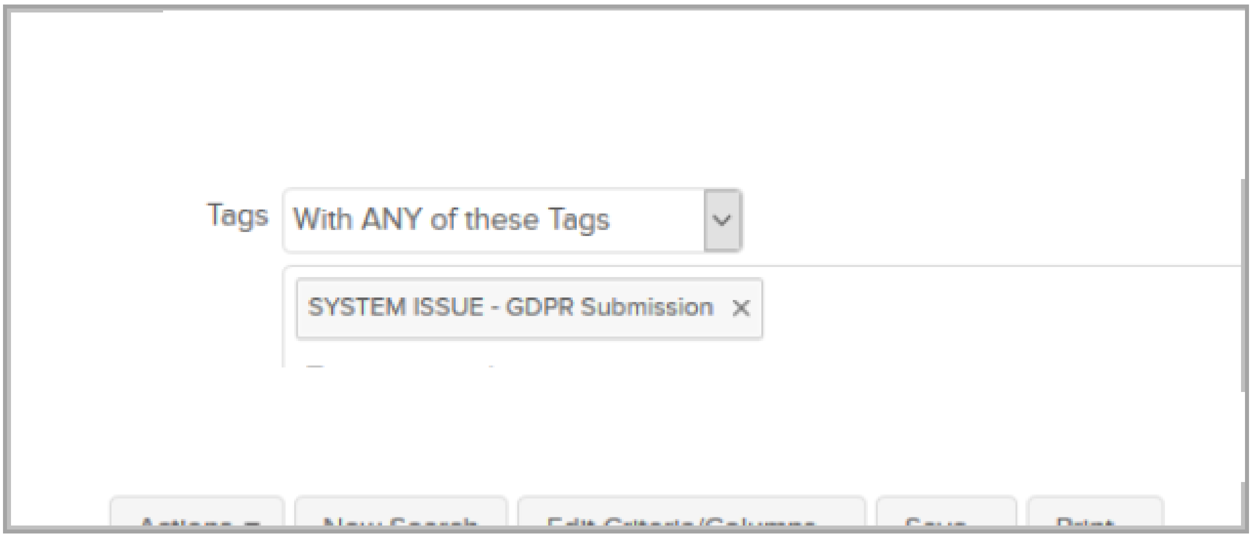


Find the contacts that may have been affected and add them to the campaign

In order to easily identify the contacts, we have created a tag**SYSTEM ISSUE - GDPR Submission**. To find **SYSTEM ISSUE - GDPR Submission** records, run the following contact search:

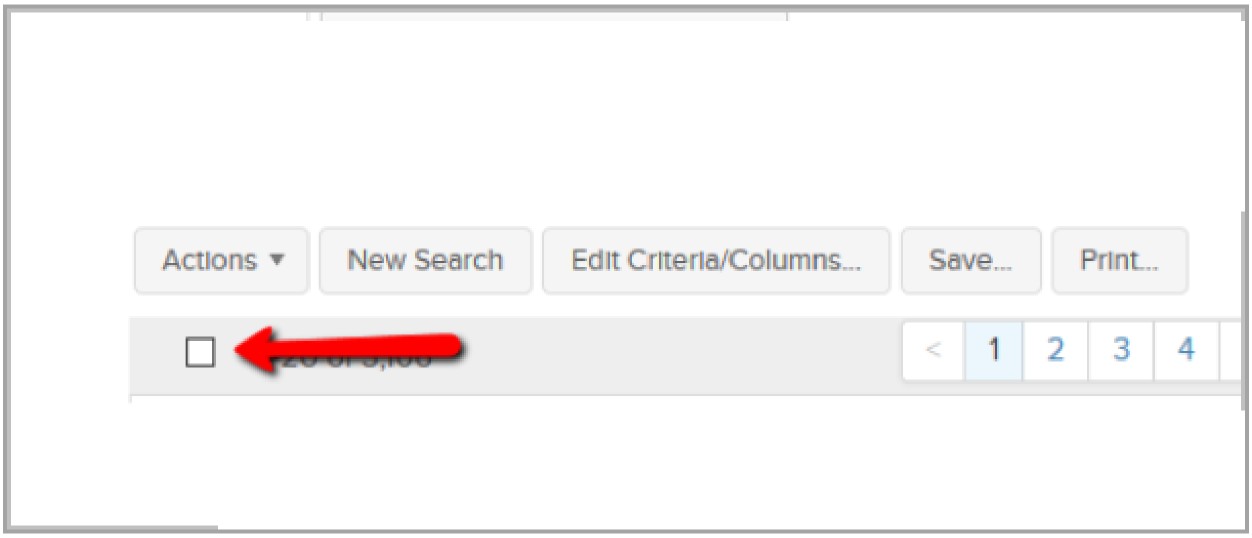
1. Go to **CRM** > **Contacts** (If previous search results display, press the **New Search** button.

2. Find the Tags criteria section. Choose, **With ANY of these Tags** from the drop-down and then search for the tag, **SYSTEM ISSUE - GDPR Submission**.

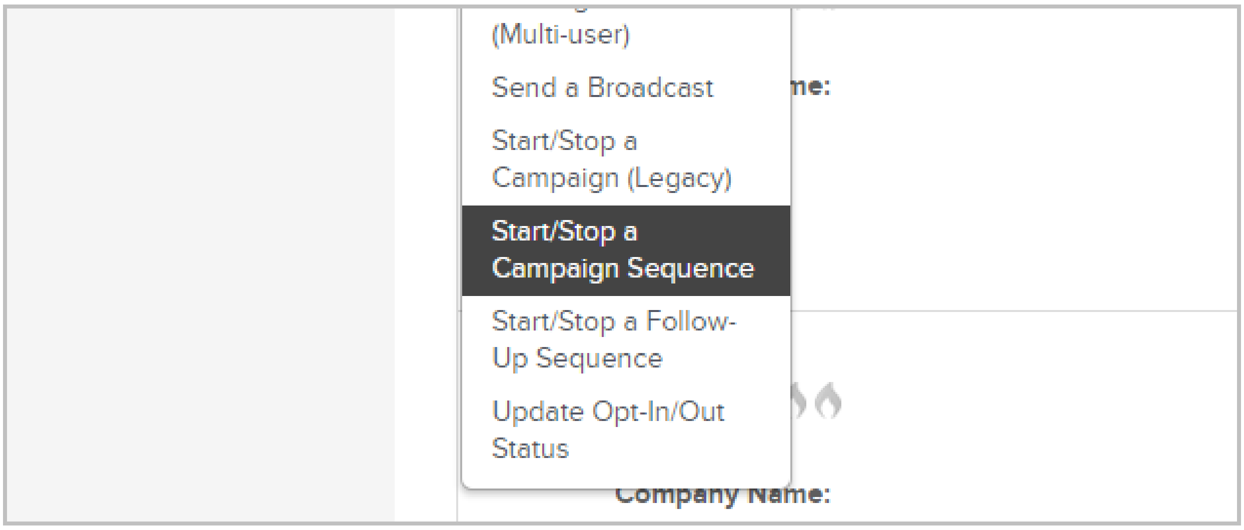


3. Press the green Search button to get results.

4. Click the **Check All** box to select all contacts.



5. Using the **Actions** button drop-down, select **Start/Stop a Campaign Sequence**



6. Select the **GDPR Helper Campaign** from the drop-down, then select the **System Issue GDPR - Contacts sequence.**

7. Select **Process Action** and your tagged contacts will be added to the campaign sequence

Repeat the same steps as above and replace the SYSTEM ISSUE - GDPR Submission tag with the **SYSTEM ISSUE - GDPR Contacts** tag and add them to the **Consent - Email sequence**.


Tags
With ANY of these Tags
SYSTEM ISSUE - GDPR Contacts


Start/Stop a Campaign Sequence
Your search returned 1 result. This action will assign contacts to a Campaign
Start
GDPR Helper Campaign
Consent Email

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Asset Domain Changes

Last Modified on 06/18/2018 9:22 am MST

Over the next few months, we will be releasing improvements to our product and website that you may notice. The domains for certain published assets will change for all users. These include published:

- Legacy landing pages
- Web forms
- Shopping carts
- Order forms
- Legacy order forms
- Email tracking links
- Hosted email links
- Referral center links including referral partner login, and client login

Please Note: These changes do not require any action on your part and do not negatively impact your customers, performance of the pages, or functionality in any way. The original links and domain will still work but will be directed to the new domain.

These changes help set the foundation for future versions of our product and website that will allow us to help you serve your customers better.

FAQ's

Q: Is there any action that I need to take as a user?
A: No. Any existing processes or links that you've previously setup will continue to work indefinitely.

Q: Will my email deliverability be affected?
A: No. There won't be any changes to the domains used for emails that get sent out. The only changes occur within the email tracking links, and the hosted email links. Any previously published link will continue to work and will redirect to the new domain.

Q: Will I have to take action regarding affiliate links?
A: No, you will not have to take any action nor should there be any impact on your existing processes or links. The links that you've previously published will continue to work and will simply redirect to the new domain.

Q: Will the redirect ever stop working?
A: We will continue to support the existing published links on the previous domain. We have no plans to stop supporting a redirect to the new URL.

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Chat Status

Last Modified on 07/12/2018 11:11 am MST

Current Support Chat Status:

Normal

Ask questions. Get Answers. Join us at community.infusionsoft.com to connect with Infusionsoft users and experts ready to help you grow your business.

We are constantly working to improve our Chat services and we want to hear from you! Click here if you would like to help shape your future chat experiences.

Support Chat Hours of Operation

24/7 Chat Support

Known Issues

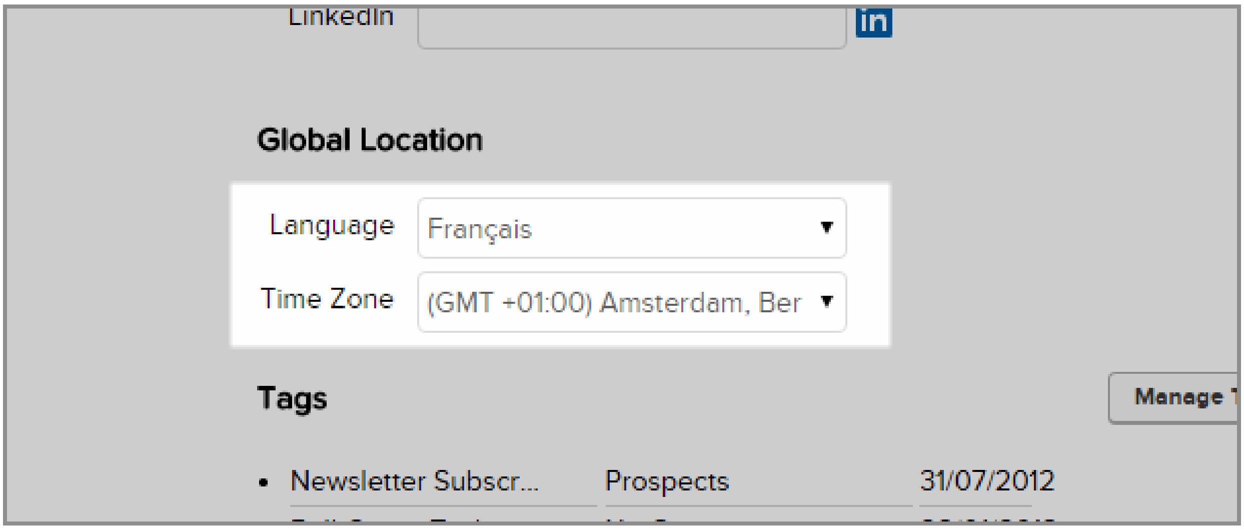
Using a different version of Infusionsoft? Click Here to learn more

Contact Time Zone and Language

Last Modified on 07/25/2018 12:28 pm MST

Connect in context! See each customer's local time, language and weather so your team is ready to make a personal connection from the start.

When a contact fills out a web form, order form, shopping cart, pays a quote, or pays an invoice, Infusionsoft will capture the timezone of the contact via their web browser and will set that as the time zone in that contact's record in Infusionsoft. When a contact submits a web form, the contact's language will also be captured. These fields are located right above the tags section on the general tab of the contact record. You can manually change these fields by selecting from the drop-down options and saving the contact record.



Tasks Marked As Complete Due to HTTP Post System Issue

Last Modified on 07/12/2018 11:11 am MST

December 21st, 2017

Between Dec 13, 4:19 pm MST and Dec 15th, 7:29 pm MST, we experienced an issue that caused a corrupt user error when an HTTP post action from a campaign tried to run. Those apps that were impacted by the issue were identified and contacted, providing them with a workaround to manually run the HTTP post action by going to the contact record and clicking resend on the campaign action.

We have since discovered that if the HTTP Post actions were run manually on contacts that had uncompleted tasks associated with them, the uncompleted tasks were erroneously marked as complete.

How do I know if I've been impacted?
Impacted users received an in-app notification on their dashboard on December 21 directing them to this help article.

What steps should I take if I've been impacted?

1. Go to **CRM** > **Contacts** > **New Search** (if necessary)
2. Set the following criteria:
    a. **Tags** > **Contains Any** = **Auto Completed Task 12.14.17**
3. **Search**
4. In the Interactive List View click on the **Tasks** tab for each contact
5. Find the completed tasks on 12/13/17 or 12/14/17
6. Click to open each task
7. Remove the completion date if the task should not have been marked complete
8. **Save** the task
9. Go to the next contact on the list

If you have additional questions, or need additional assistance, please contact Support @ 1-

866-800-0004 Ext 2 or via the in-app chat.

Known Issue Resolution - Campaign Entry Goals Not Triggering

Last Modified on 06/18/2018 9:22 am MST

During the scheduled system updates this past weekend, we experienced an issue with some campaign entry goals not triggering. We have identified your application as potentially being impacted. The primary issue has now been resolved but additional action may be required

Campaigns that have been identified as affected will display an error in the 'Error Message' column when viewing your list of campaigns under Marketing > Campaign Builder. The error message will read "Saturday, December 16th 5:00pm MST Update"

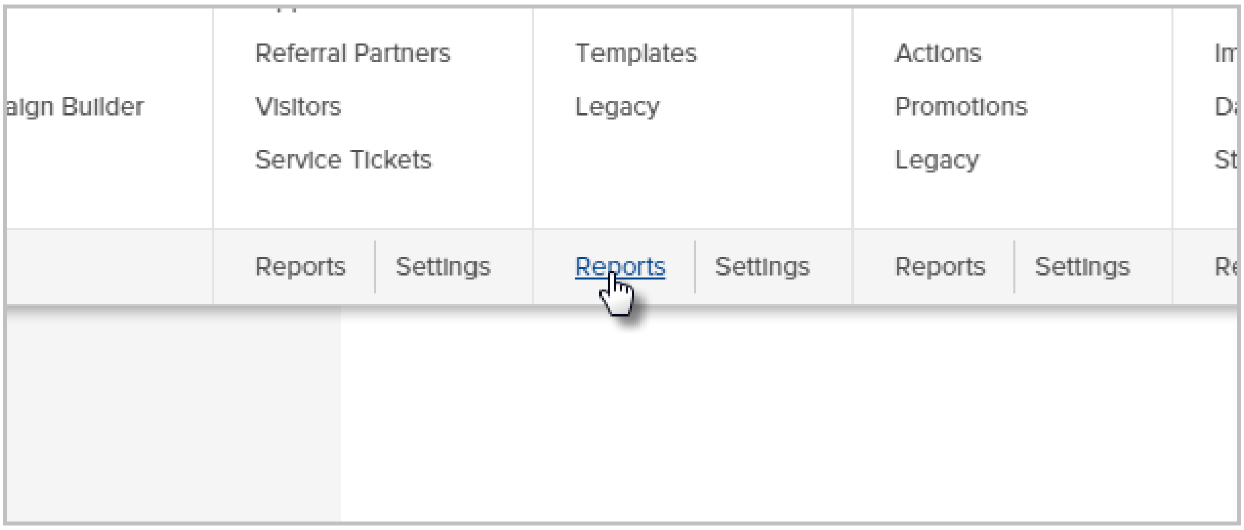
Error msg
Saturday, December 16th 5:00pm MST Update

This issue directly affected entry goals in campaigns. If a campaign was set to start with a 'Web Form' or a ' Landing Page ', the submission was still recorded to Infusionsoft, but the campaign automation was not triggered to begin.

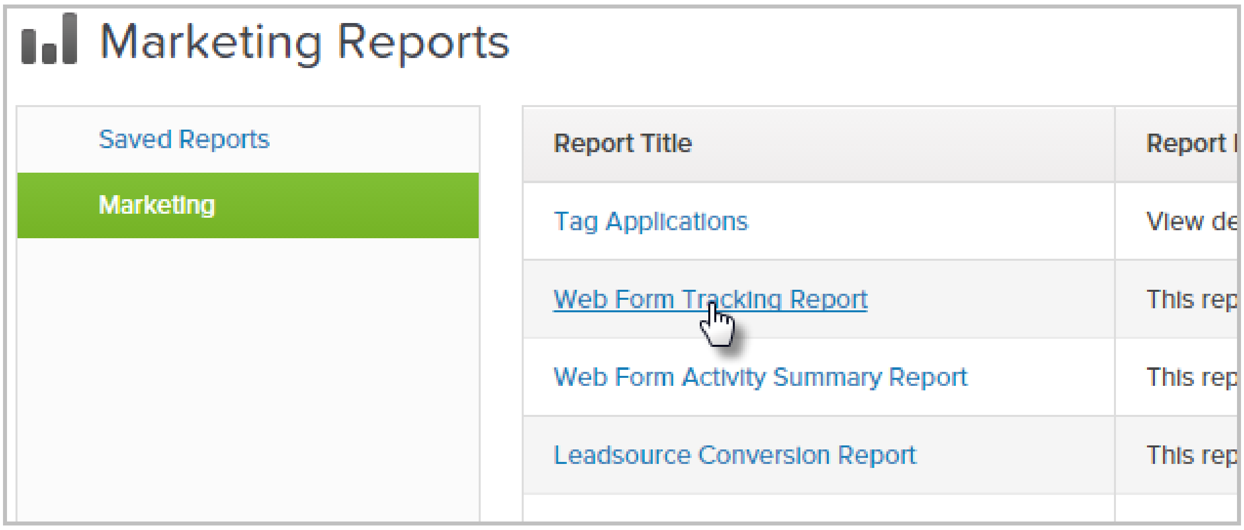
If you would like to look into your Infusionsoft account and find the potentially impacted contacts, you may use the following steps to identify them depending on which type of entry point Goal is used to add contacts to your campaign:

Submits a Web Form

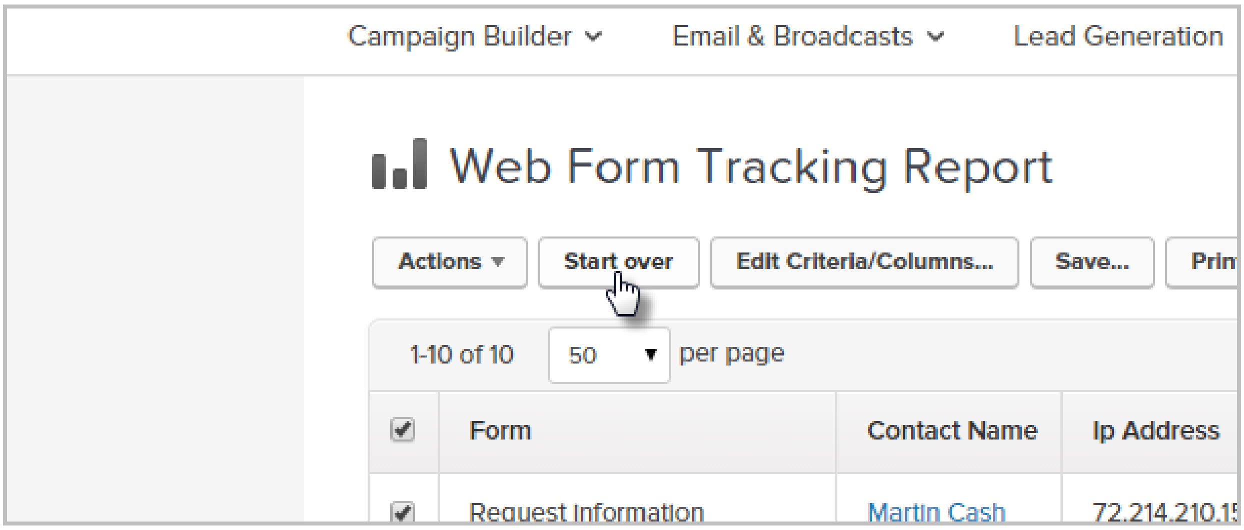
1. Navigate to **Marketing** > **Reports**



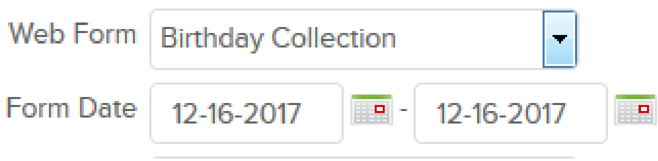
2. Click on **Web Form Tracking Report**



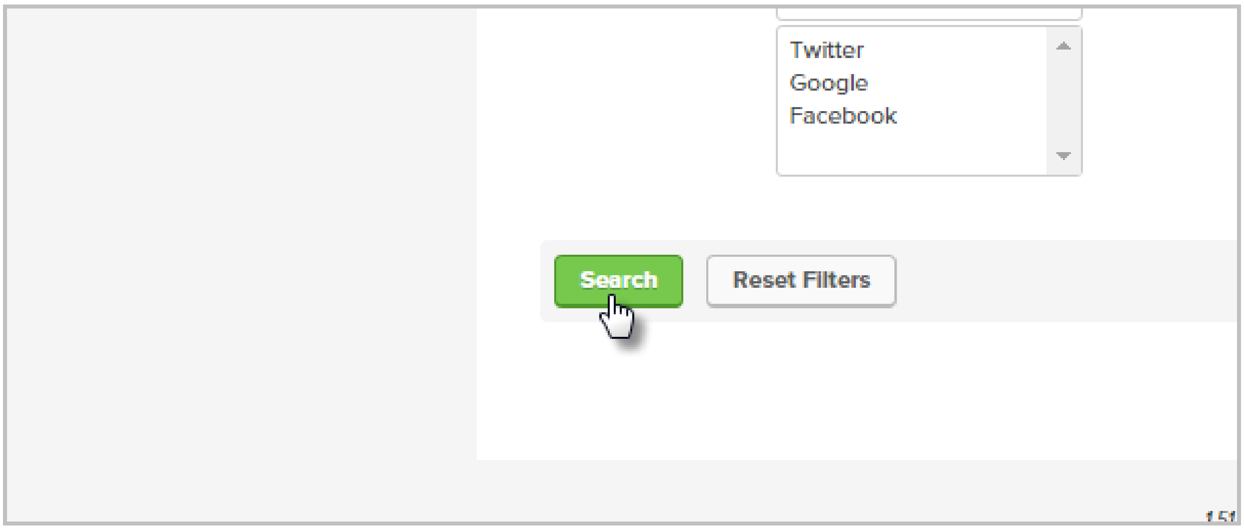
3. Click **Start Over** if available



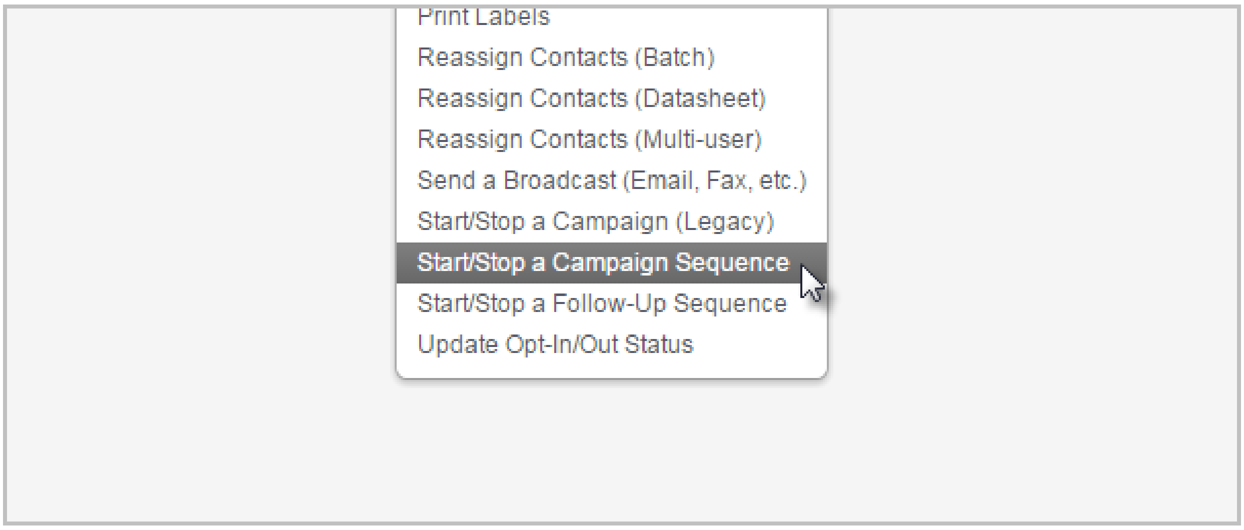
4. Select the web form name and Form date range of 12-16-2017 - 12-16-2017 from the drop-down menu



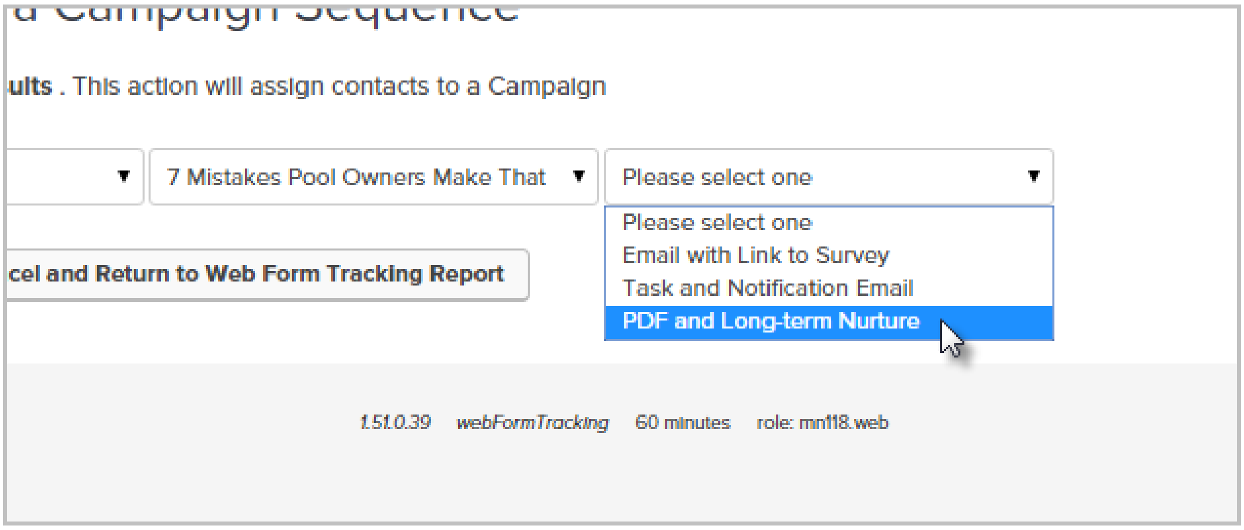
5. Click **Search**



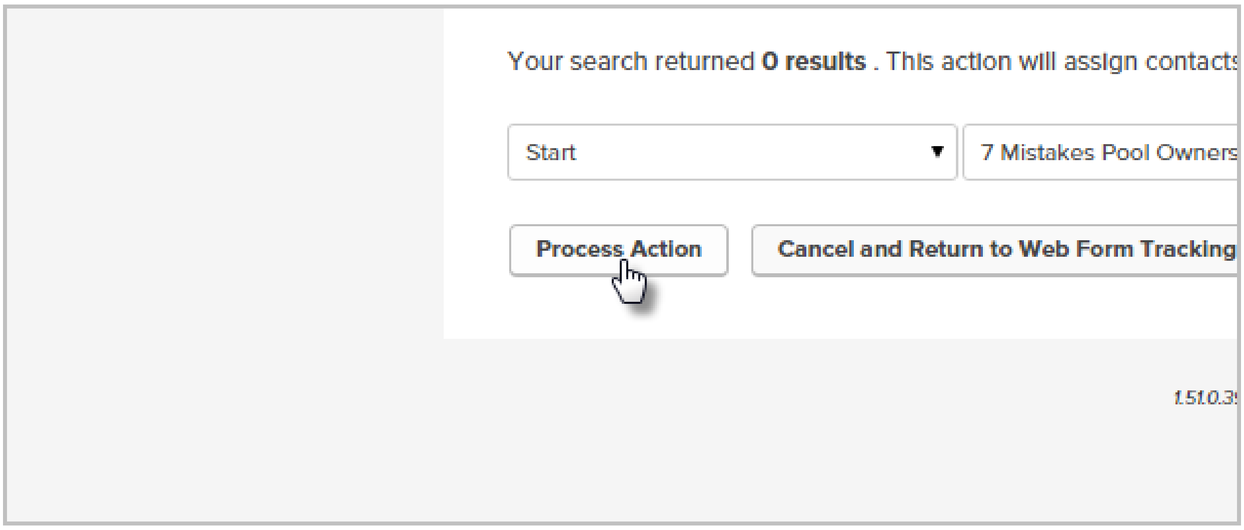
6. Click **Actions** > **Start/Stop Campaign Sequence**



7. Select the name of the campaign, then the name of the sequence from the drop-downs



8. Click Process Action



Submits a Landing Page Form

1. Navigate to Marketing > Reports
2. Click on Web Form Tracking Report
3. Click Start Over if available
4. Select the landing page name from the drop-down menu
5. Select Form date range of 12-16-2017 - 12-16-2017
6. Click OK
7. Click Actions > Start/Stop Campaign Sequence
8. Select the name of the campaign, then the name of the sequence from the drop-downs.
9. Click Process Action

Reaches a Score

1. Navigate to CRM > Contacts
2. Click Start Over if available
3. In the lead score drop-down, select the number of flame icons you specified in your campaign.
4. Click Actions > Start/Stop Campaign Sequence
5. Select the campaign and sequence from the drop-down menus.
6. Click Process Action

Purchases a Product

1. Navigate to E-Commerce > Reports
2. Click on All Sales Report
3. Click Start Over if available
4. Enter the date range of 12-16-2017 - 12-16-2017
5. Click on the Misc. Criteria tab
6. Select the products from the Products drop-down.
7. Click Search
8. Click Actions > Start/Stop Campaign Sequence
9. Select the campaign and sequence from the drop-downs
10. Click Process Action

Submits an Internal Form

There is no report to determine from submissions

Moves an Opportunity

1. Navigate to CRM > Opportunities
2. Click Start Over if available
3. Select the opportunity stage you set in the campaign
4. Manually review each record via the Campaigns are in Interactive view
5. Click Actions > Start/Stop Campaign Sequence
6. Select the campaign and sequence from the drop-downs
7. Click Process Action

Applies a Note

1. Navigate to Admin > Reports
2. Select the Task Note Report
3. Click Start Over if available
4. Enter the title of the note in the Main Search field
5. Enter the date range of 12-16-2017 - 12-16-2017
6. Contacts will need to be manually added to the campaigns
7. Click on the contact's name
8. Click on the Campaigns tab
9. Click Add to Sequence
10. Select the campaign and sequence from the drop-down
11. Click Add

Applies a Tag

1. Navigate to CRM > Contacts
2. Click Start Over if available
3. Select the tag(s) from the Tags field
4. Click Search
5. Tag applied date will need to be manually verified under the Applied column in Interactive view
6. Uncheck any contacts that you do not want to add to the campaign
7. Click Search
8. Click Actions > Start/Stop Campaign Sequence
9. Select the campaign and sequence from the drop-downs
10. Click Process Actions

Using a different version of Infusionsoft? Click Here to learn more

Campaign Builder HTTP Posts Triggering Corrupt User Error

Last Modified on 06/18/2018 9:22 am MST

12/14/2017 7:30 PM MST

We experienced a software defect that began at approximately 8:30 PM MST December 13th, 2017 through 7:30 PM MST on December 14th, 2017.

Campaign Builder HTTP Posts that were scheduled to run after a contact achieved a campaign goal (such as a web form) failed to post and would display a 'Corrupt User' error message on the contact record's recent campaign history.

This means that if a contact fills out a web form, and there is a sequence that contains a process to send an HTTP Post with their contact information to another system, that action will not run. The web form information will still be captured in your Infusionsoft application.

HTTP Posts scheduled to post during this time frame will need to be re-sent.

Below are further details on what this means for broadcast and campaign emails and what course of action you may need to take:

Campaigns

I had a contact scheduled to have HTTP Posts scheduled to run during the affected time frame, what happened to them?

The campaign post would have failed to run from the application. Posts can be manually re-sent from within the Contact Record 'Campaigns' tab. Contacts can also be identified through the Campaign Reporting by following the steps in this article and including the date range of 12/13/2017 through 12/14/2017 in the criteria.

Contacts can also be identified through the Sequence Step Recipients report available under Marketing > Reports and use the HTTP Post's name in the 'Flow Item' field as well as the date range of 12/13/2017 through 12/14/2017 in the criteria.

At Infusionsoft, we are committed to helping small businesses succeed and we know that this issue may have had an impact on your business. We deeply regret the challenge this created and are at work on implementing measures to prevent additional impact on your business. Please contact Support if you have any questions.

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Email Performance System Issue August 29th 2017

Last Modified on 07/12/2018 11:12 am MST

Posted August 29th, 2017, 6:12PM EDT

We experienced an email performance system issue that began approximately 12:00am EDT August 29th, 2017 through 10:00am EDT on August 29th, 2017. Emails scheduled to send during this time frame were delayed or did not send until the issue was resolved at 10:00am. Some emails were unable to be recovered and will need to be re-sent.

Below are further details on what this means for broadcast and campaign emails and what course of action you may need to take:

Email Broadcasts

What if I had a broadcast scheduled during the time frame?

The broadcast email may have failed to send to all contacts in the list and will need to be re-sent. To locate recent broadcasts, please follow the steps in this article.

Campaign Emails

I had contacts scheduled to receive emails during the affected time frame, what happened to them?

The campaign email may not have been sent to the contacts. Emails can be manually re-sent from within the Contact record, Campaigns tab. Contacts can also be identified through the Campaign Reporting by following the steps in this article and including the date range of 08/28/2017 through 08/29/2017 in the criteria.

At Infusionsoft we are committed to helping small businesses succeed and we know that this issue may have had an impact on your business. We deeply regret the challenge this created and are at work on implementing measures to prevent additional impact to your business.

Please contact Support if you have any questions.

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Infusionsoft Payments Invalid CVV Issue

Last Modified on 07/12/2018 11:09 am MST

We experienced a system issue that began approximately 9:00pm MST August 7, 2017 and persisted through 10:00pm MST on August 14, 2017.

During this time frame, the following error message would be displayed if your contacts attempted to make a product purchase using a credit card that has a CVV code (also known as CVC) beginning with 0.

1003 (1003): Invalid parameter cvv

We have resolved the root cause of the issue but were unable to tokenize the credit cards that were attempted during the above time frame.

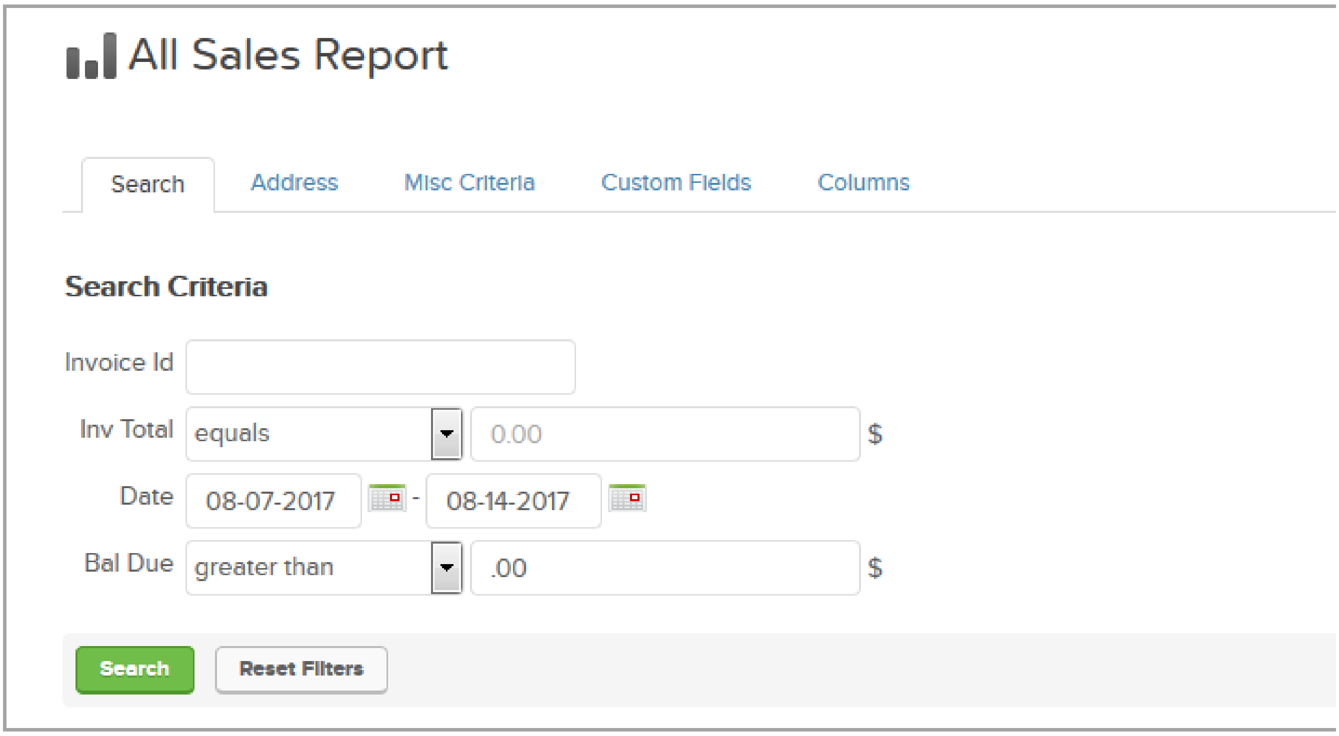
What happened to the orders if my contact was not able to enter an alternative payment method?
All orders have been successfully created within your application and will have an outstanding balance.

How can I identify the contacts that encountered the error?
We have applied the tag "System Issue - Infusionsoft Payments Error 1003" to the contacts that we suspect may have encountered the error due to the issue. Due to PCI Compliance, we are unable to store CVV codes and the list may also include contacts that have entered an incorrect or typoed the CVV.

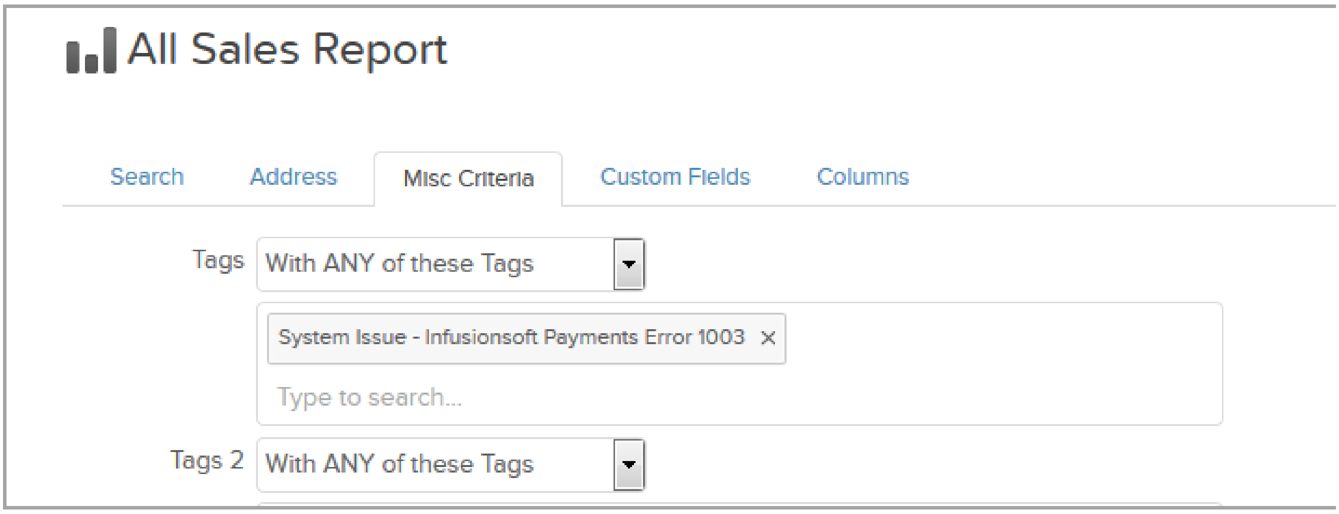
What actions do I need to take?
We recommend using the "All Sales Report" to identify the tagged contacts that have orders with an outstanding balance.

1. Navigate to **E-Commerce > Reports > All Sales Report**

2. On the Search tab, enter a date range of **August 7th through August 14th, 2017 and a Balance due value of greater than and 0.00**



3. Click on the **Misc Criteria** tab and enter tag, **System Issue - Infusionsoft Payments Error 1003**



It may be necessary to obtain the CVV code or alternative payment method from your customers and re-attempt the credit card charge. A successful transaction will tokenize the credit card that can be used on future manual orders.

At Infusionsoft we are committed to helping small businesses succeed and we know that this issue may have had an impact on your business. We deeply regret the challenge this created and are at work on implementing measures to prevent additional impact to your business.

Please contact Support if you have any questions.

Saved Search System Issue

Last Modified on 07/12/2018 11:09 am MST

We experienced a system issue that began approximately 9:00pm PST July 10, 2017 and persisted through 10:00pm PST on July 14, 2017. During this time frame, searches were returning inaccurate results if certain criteria was used or edited. We have resolved the root cause of the issue but found some Saved Searches/Reports with specific criteria/filter combinations may not have saved correctly in the database.

What Reports and Criteria combinations were affected?

Report NameFilter/Criteria

Campaign Contacts Report	Sequence Stop Date, Sequence Start Date
Orders Search	Order Title
Call History Summary	Action Type
Task Note Report	Task Type
Email Broadcasts Report	Follow-up Sequence field

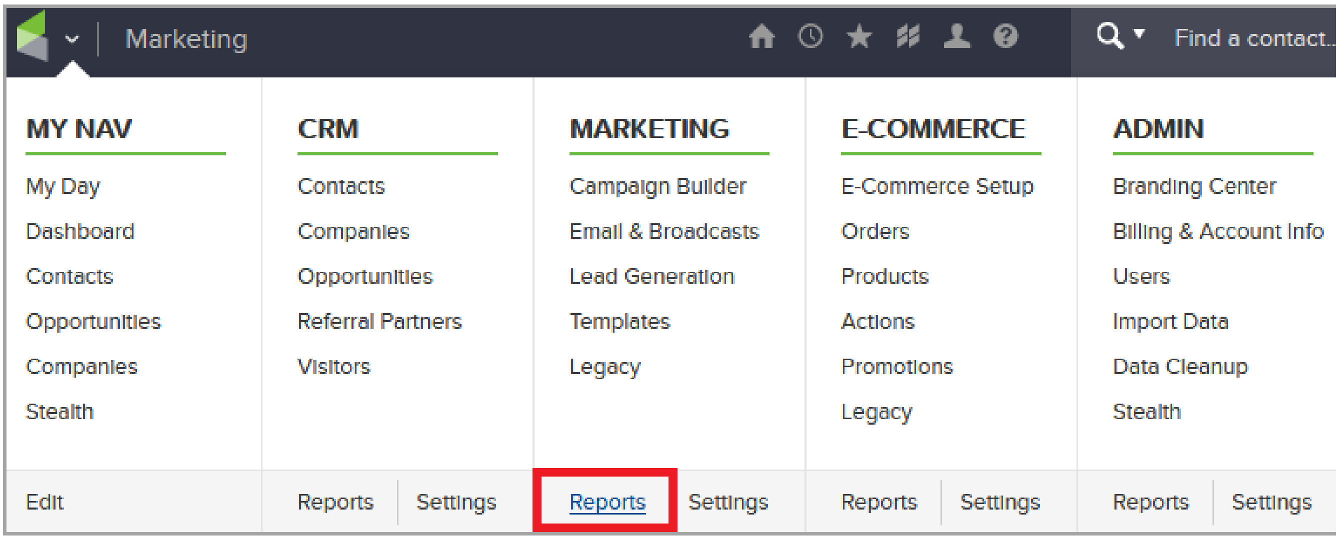
What actions do I need to take to fix my saved Search/Report?

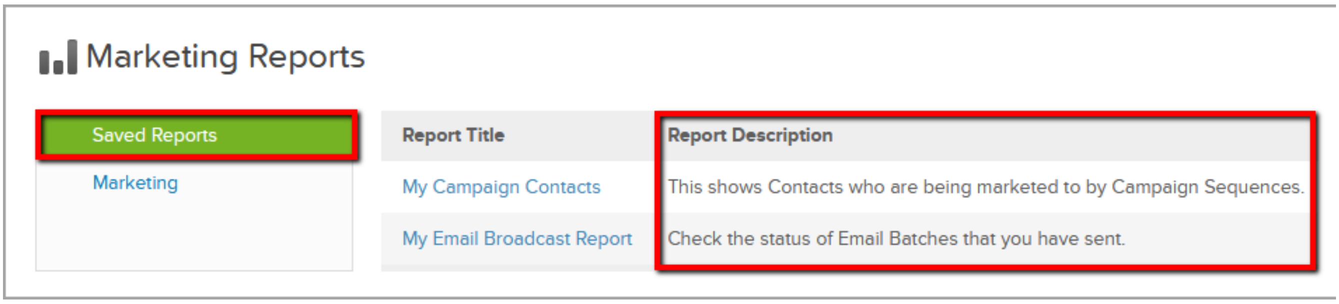
We recommend reviewing the criteria for any of the saved searches/reports listed above and re-saving it, even if no changes are necessary.

How do I locate the following saved Reports?

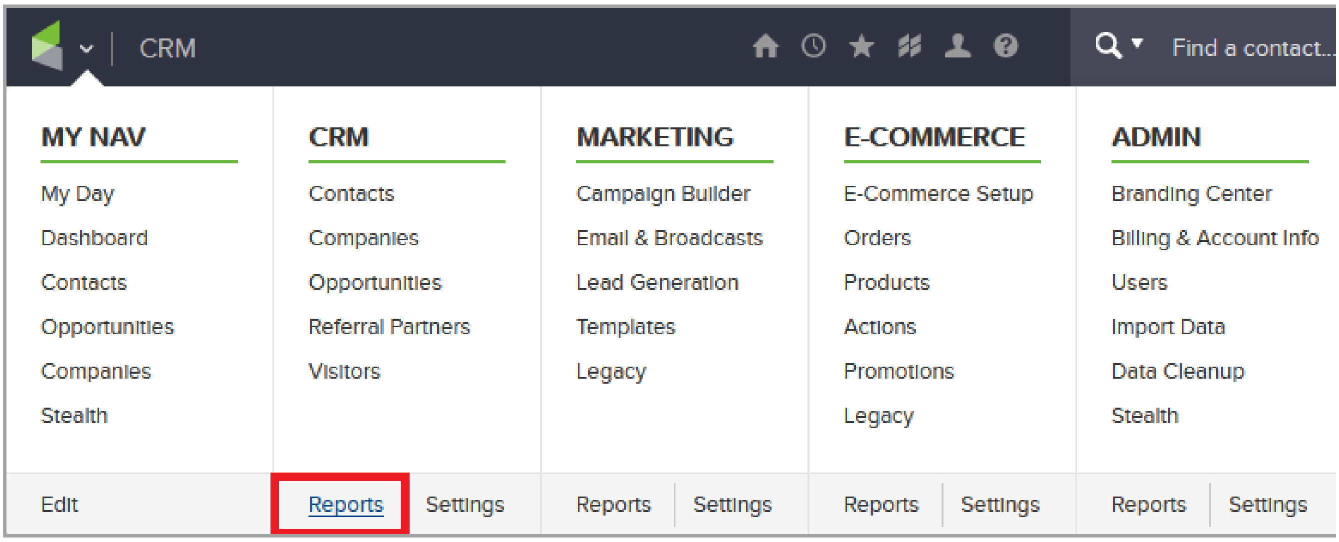
- Campaign Contacts Report: Navigate to Marketing > Reports > Saved Reports > Report Description will read as, This shows Contacts who are being marketed to by Campaign Sequence s.
- Email Broadcasts Report: Navigate to Marketing > Reports > Saved Reports > Email

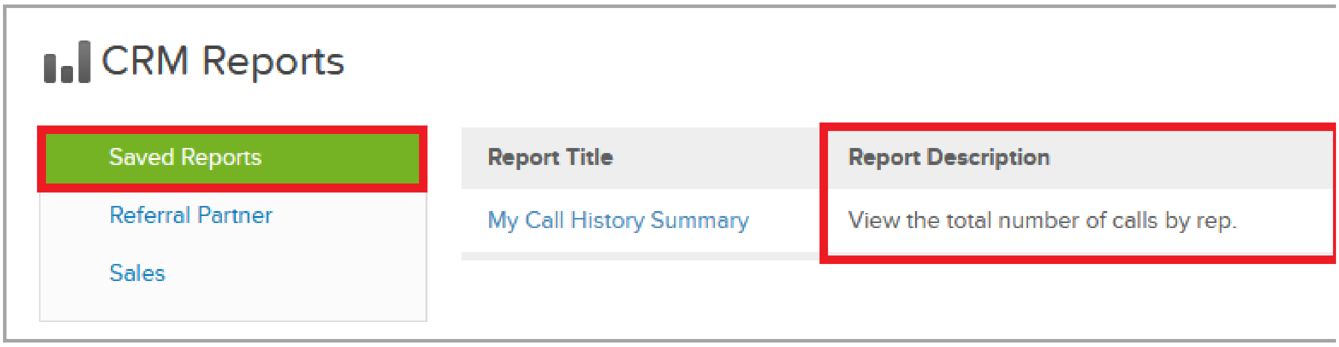
Broadcast Report > Report Description will read as, Check the status of Email Batches that you have sent.



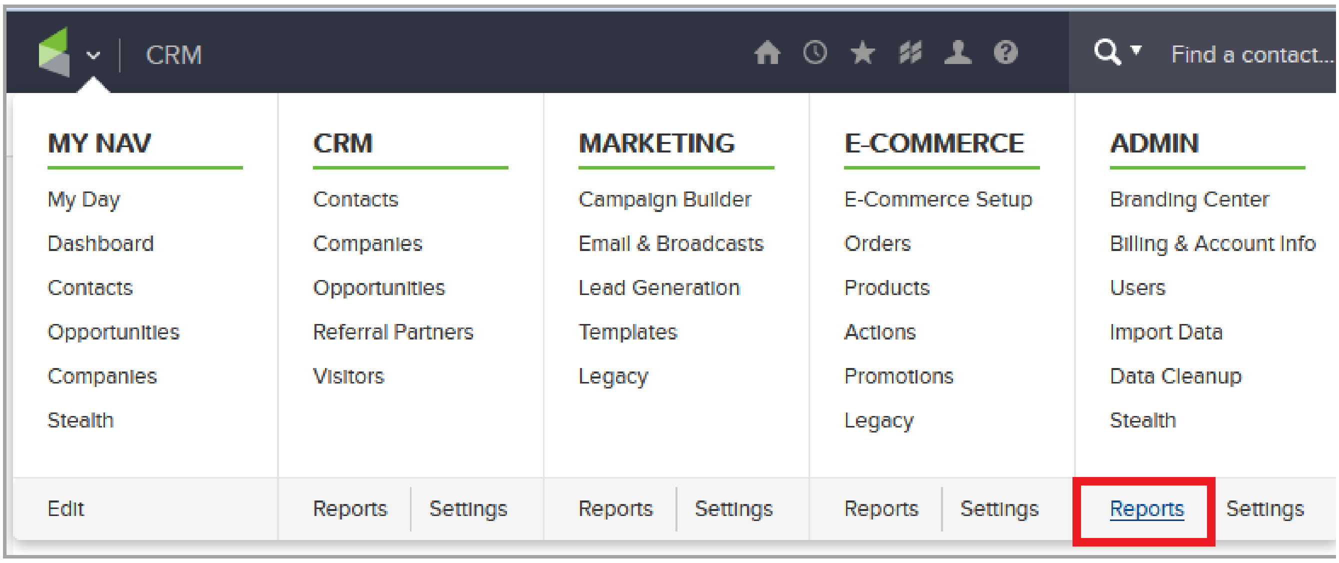


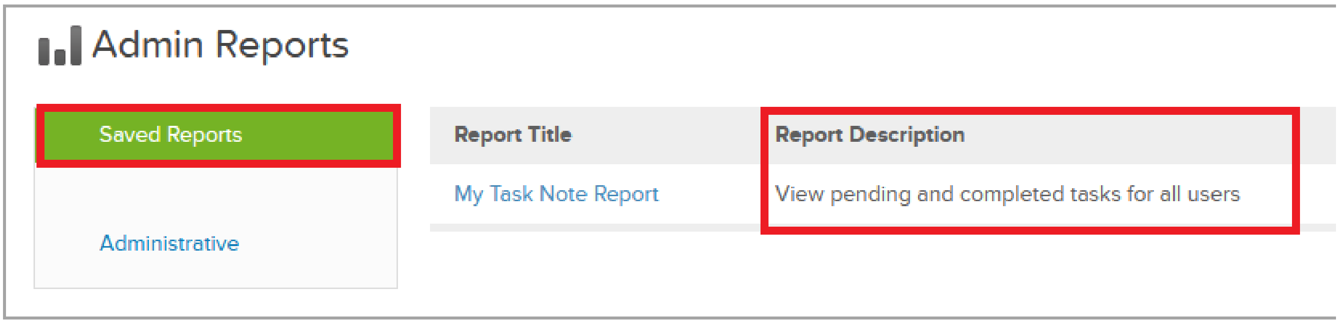
- Call History Summary: Navigate to CRM > Reports > Saved Reports > Report Description will read as, View the total number of calls by rep.





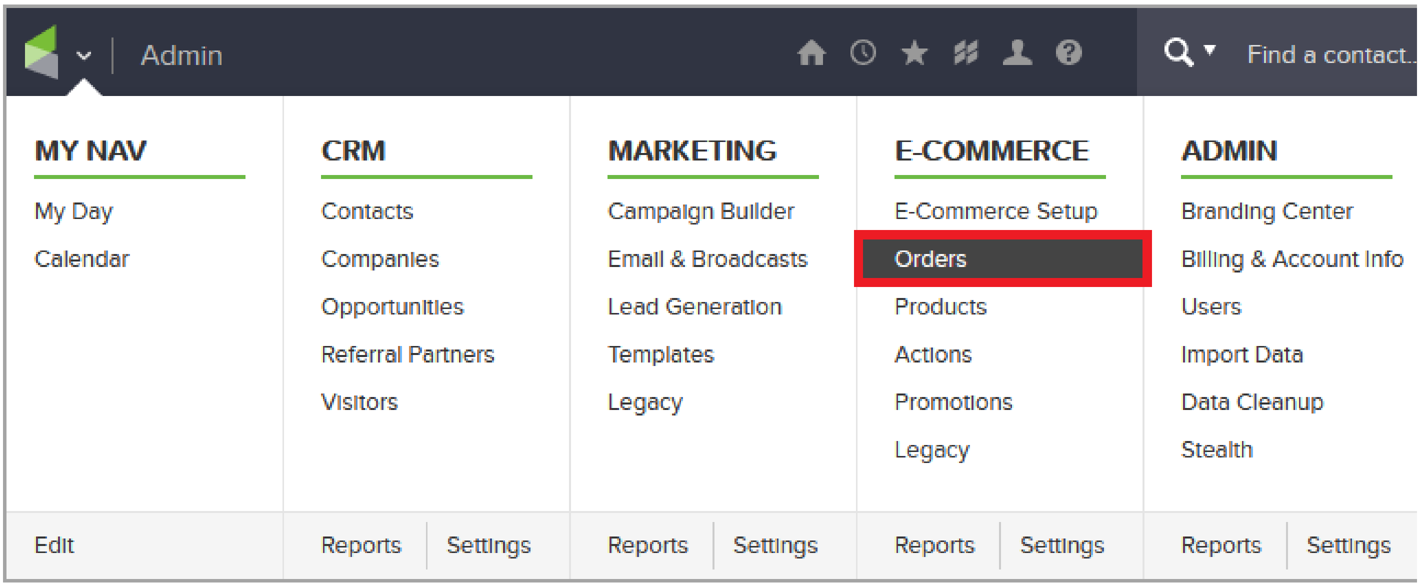
- Task Note Report: Navigate to Marketing > Reports > Saved Reports > Task Note Report > Report Description will read as, View pending and completed tasks for all users.

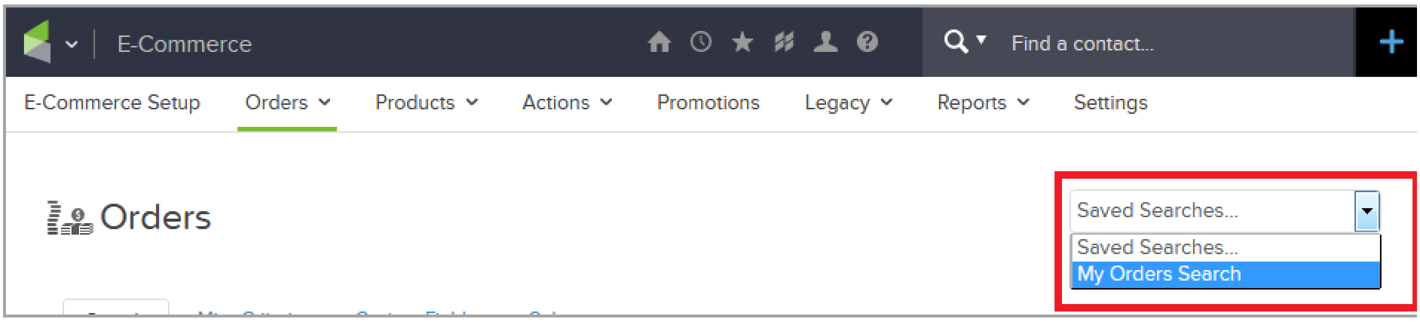




How do I locate the saved Orders Search?

Navigate to E-Commerce > Orders > Select the saved Search from the Saved Searches drop-down



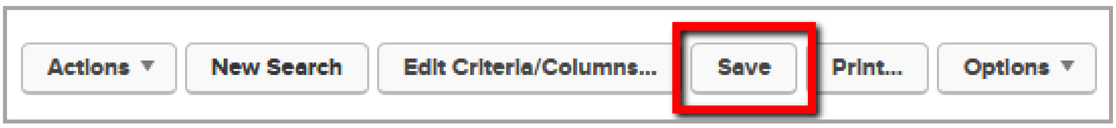


How do I review the search/report criteria?

After clicking on the saved search/report name, select the Edit Criteria/Columns... button

How do I re-save the reports?

After clicking on the saved search/report name, verifying the criteria, click the Save button.



At Infusionsoft we are committed to helping small businesses succeed and we know that this issue may have had an impact on your business. We deeply regret the challenge this created and are at work on implementing measures to prevent additional impact to your business.

Please contact Support if you have any questions.

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Temporary System Issue June 26 2017

Last Modified on 07/12/2018 11:09 am MST

We experienced a temporary system issue between approximately 9:00 PM MST June 26th, 2017 and 8:00 PM MST on June 27th, 2017.

How Do I find the contacts that may have been affected?

In order to easily identify the contacts, we have created a tag called, System - Updated Non-Marketable Status List. To find System - Updated Non-Marketable Status List records, run the following contact search:

1. Navigate to **CRM -> Contacts**. (If previous search results display, click the **New Search** button)
2. Find the Tags criteria section. And choose **With ANY of these Tags** from the drop down and then search for the tag, **System - Updated Non-Marketable Status List**
3. Press the green **Search** button to get results

Below are further details on what this means for broadcast and campaign emails and what course of action you may need to take:

Broadcasts

What if I had a broadcast scheduled to affected contacts during the time frame?

The broadcast email will not have been sent to the Non-Marketable contact and will need to be re-sent. To locate recent broadcasts, please follow the steps in this article.

Campaigns

I had contacts scheduled to receive emails during the affected time frame, what happened to them?

The campaign email will not have been sent to the Non-Marketable contacts. Emails can be manually resent from within the Contact record's, Campaigns tab. Contacts can also be identified through the Campaign Reporting by following the steps in this article and including the tag System - Updated Non-Marketable Status List in the criteria.

At Infusionsoft we are committed to helping small businesses succeed and we know that this issue may have had an impact on your business. We deeply regret the challenge this created and are at work on implementing measures to prevent additional impact to your business. Please contact our Support team if you have any questions.

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ICON 2017 Product Update

Last Modified on 06/19/2018 3:15 pm MST

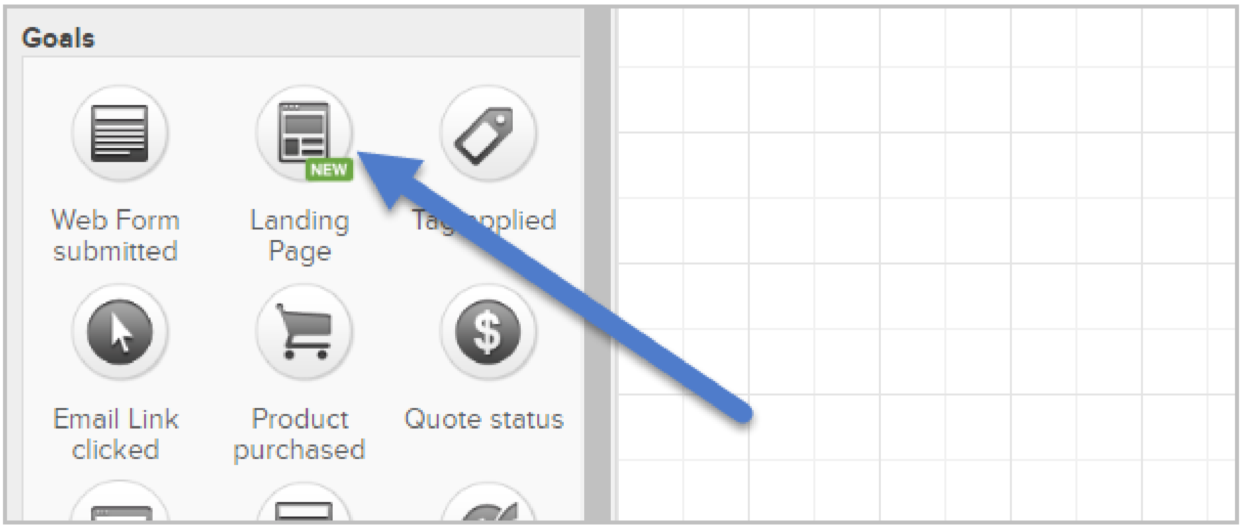
New Landing Pages

Quickly create beautiful landing pages for your marketing campaigns with New Landing Pages.

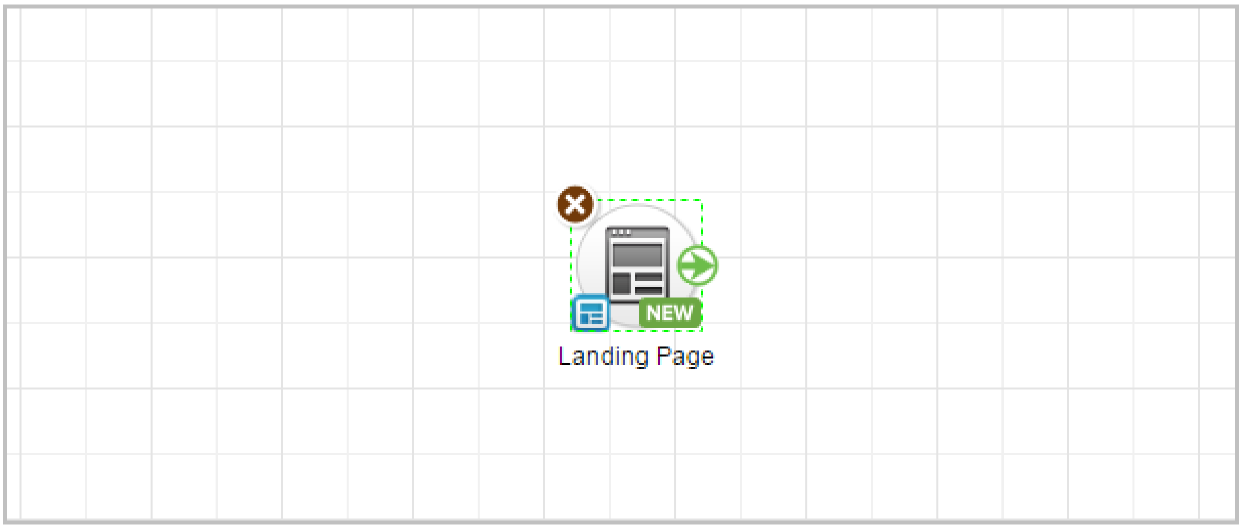
Find the new Landing Page icon in the campaign builder

1. Navigate to the Campaign Builder.

2. From the campaign goal section on the left-hand sidebar, locate the new "Landing Page" goal and drag it out onto the campaign canvas .



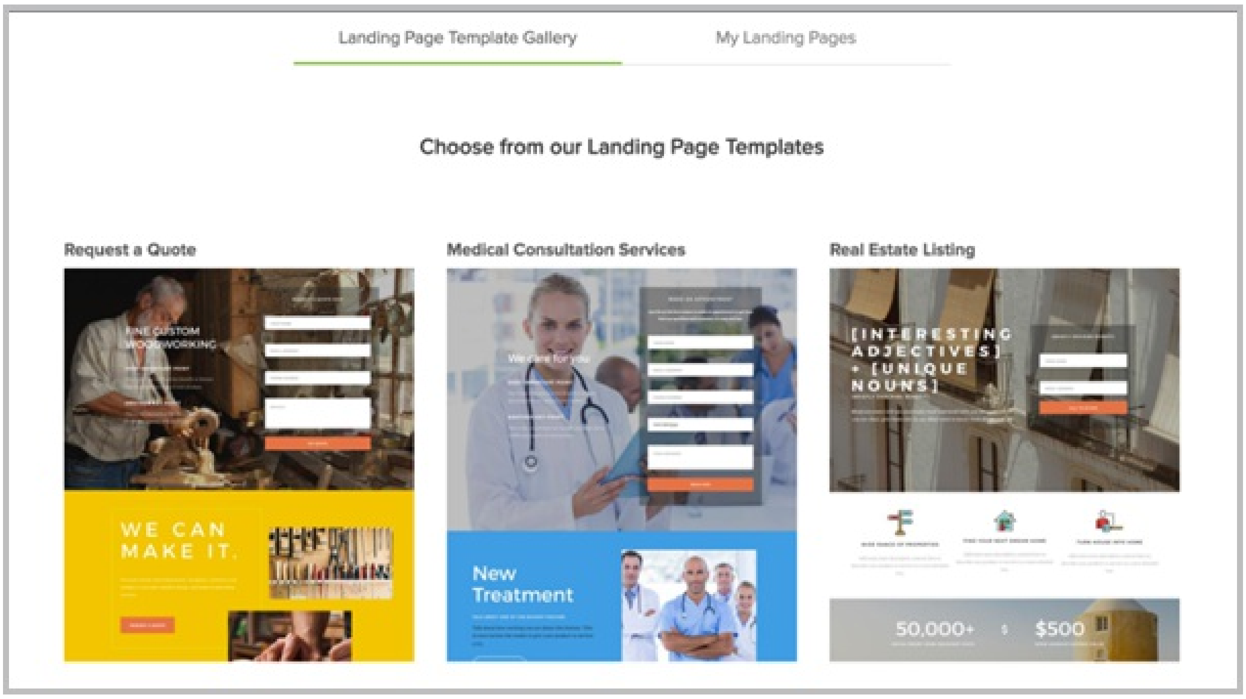
3. With the new "Landing Page" on the canvas, double-click on the goal to begin configuration.



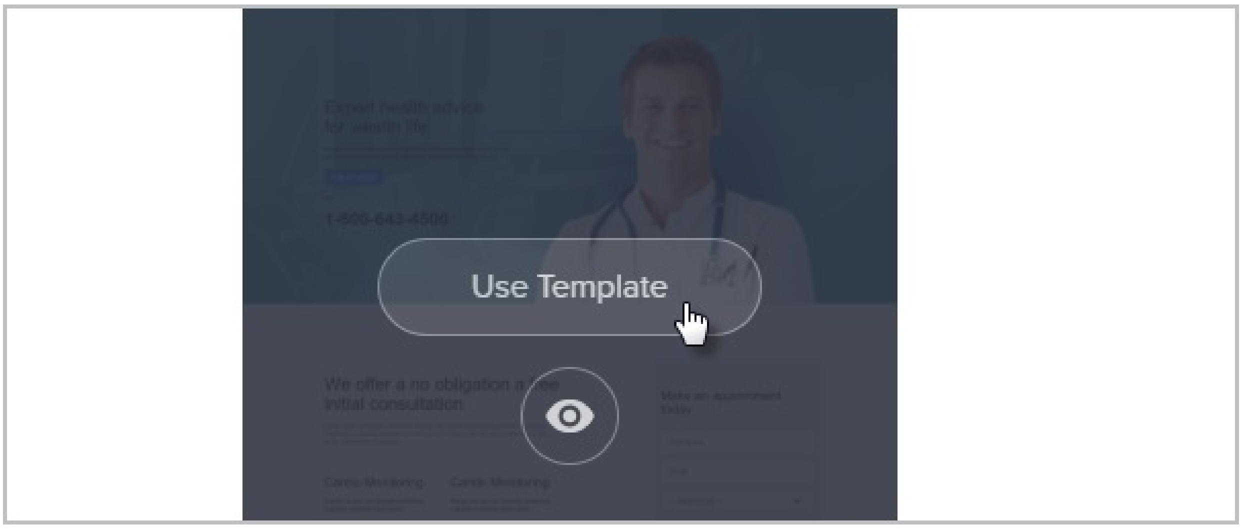
Landing Page Management

Similar to the new Email Builder, you are met with both a gallery of predesigned landing page templates and a gallery of saved/existing landing pages.

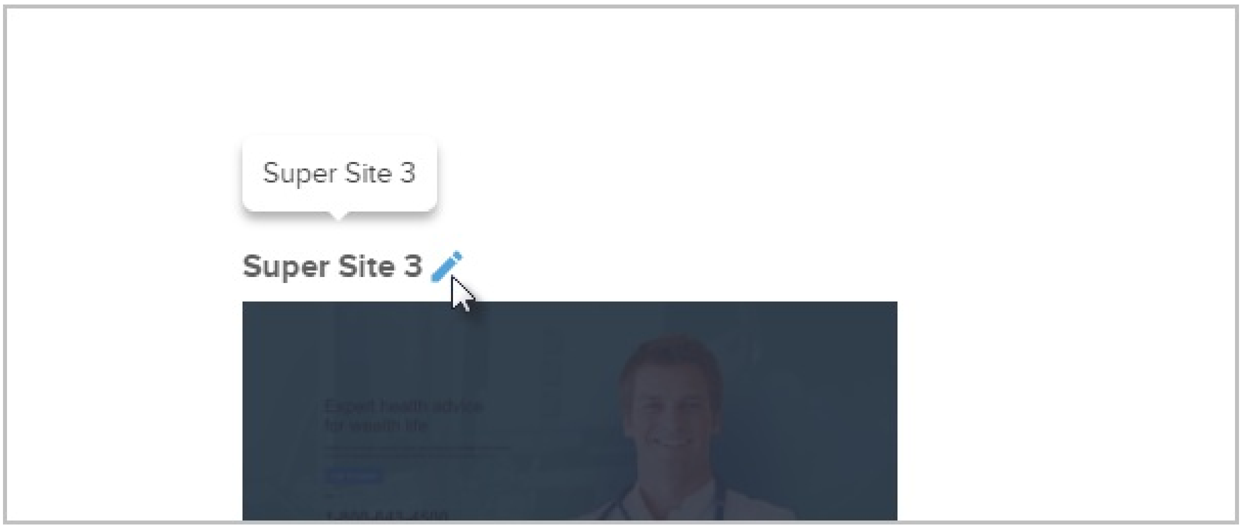
Landing Page Template Gallery



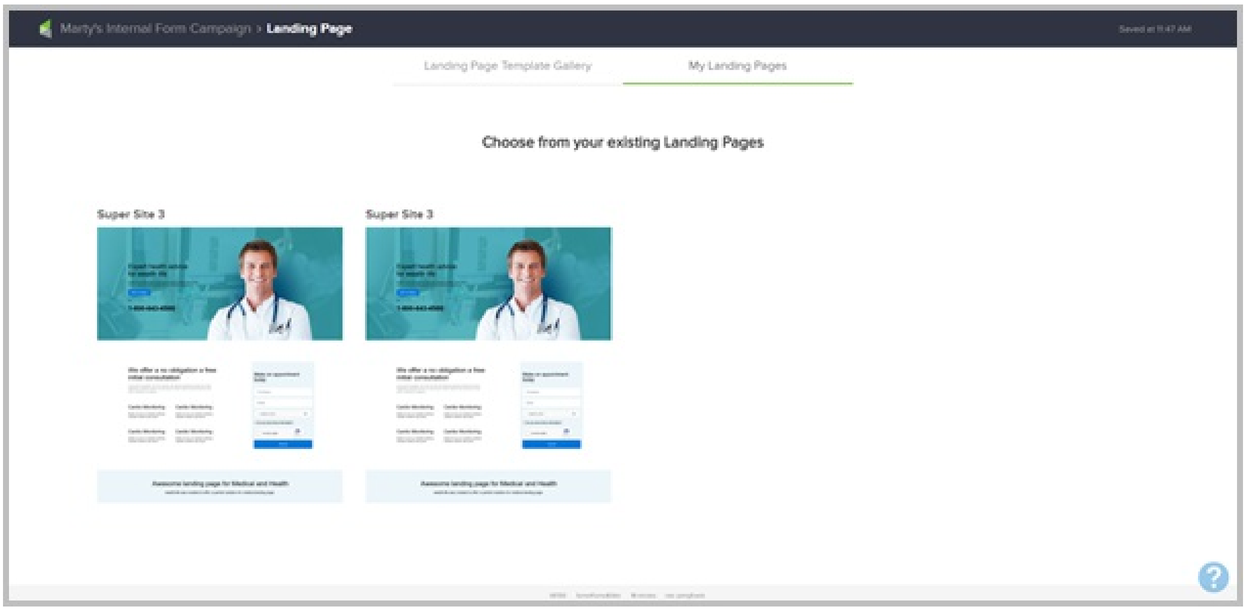
Hover over one of the predesigned landing page templates and click the Use Template button to start customizing it, or click the "eye" icon to preview the template. While previewing the template, you can click the Use Template button to start customizing it or click the X button to return to the gallery.



Rename an existing landing page by clicking on the pencil icon next to the name of the landing page at the top of the preview card. Once you click this pencil, you will be prompted with a text box to alter the name of your template. You may save your changes by pressing the Enter key on your keyboard. You can cancel your changes by clicking away from the text box or by pressing the Esc key on your keyboard.

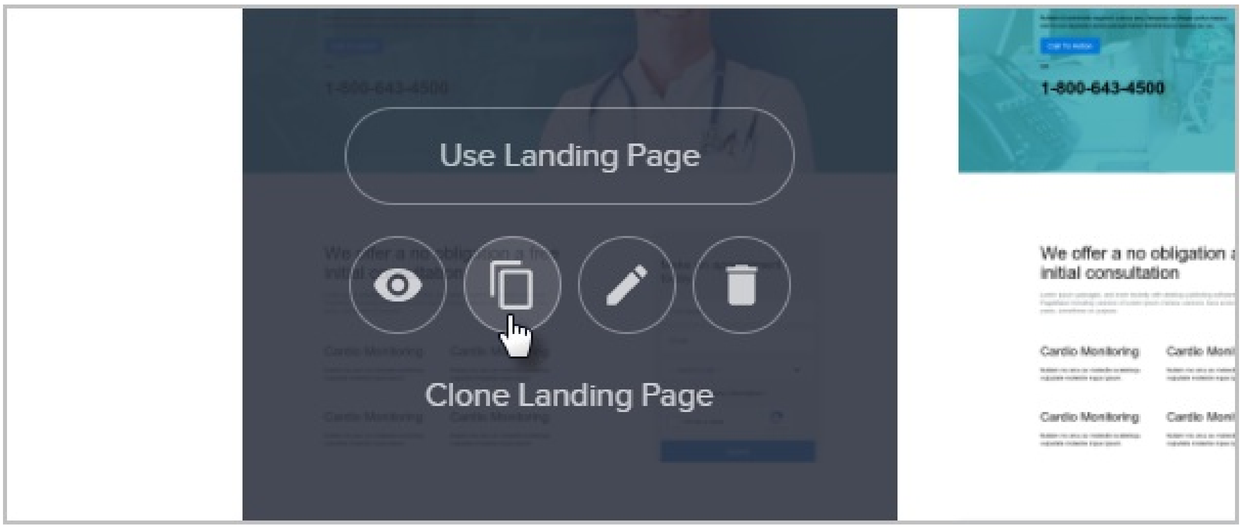


My Landing Pages



Click the My Landing Pages tab to view your previously used landing pages.

Hover over a template to:



- Use Landing Page: Start using this template in your campaign
- Preview Landing Page: See a desktop and mobile preview of the landing page
- Clone Landing page: Make a copy of the landing page. Once you click this button, a clone of your landing page will appear and you will be prompted to name it.
- Edit Landing Page: Click the pencil icon to modify the landing page. Once you click the pencil icon, you will be taken to the Landing Page editor.
- Delete Landing Page: Click the trashcan icon to delete the landing page. When you click this button, you will be prompted to confirm your request to ensure landing pages aren't accidentally deleted. Once you click the red Delete button, the landing page will be permanently deleted. If you decide to keep the page, click the Cancel button which will return you to the main hover state.

Please Note! Only one unique landing page may be connected to one sequence at a time. If you want to use the same landing page with the same automation for another campaign or another sequence within the same campaign, you will need to make a copy of it for each individual use case.

Infusionsoft WordPress Plugin

Create opt-in forms right from within WordPress to simplify the process of designing, placing, and triggering forms across multiple ways and pages on your WordPress website.

WordPress Plugin Setup

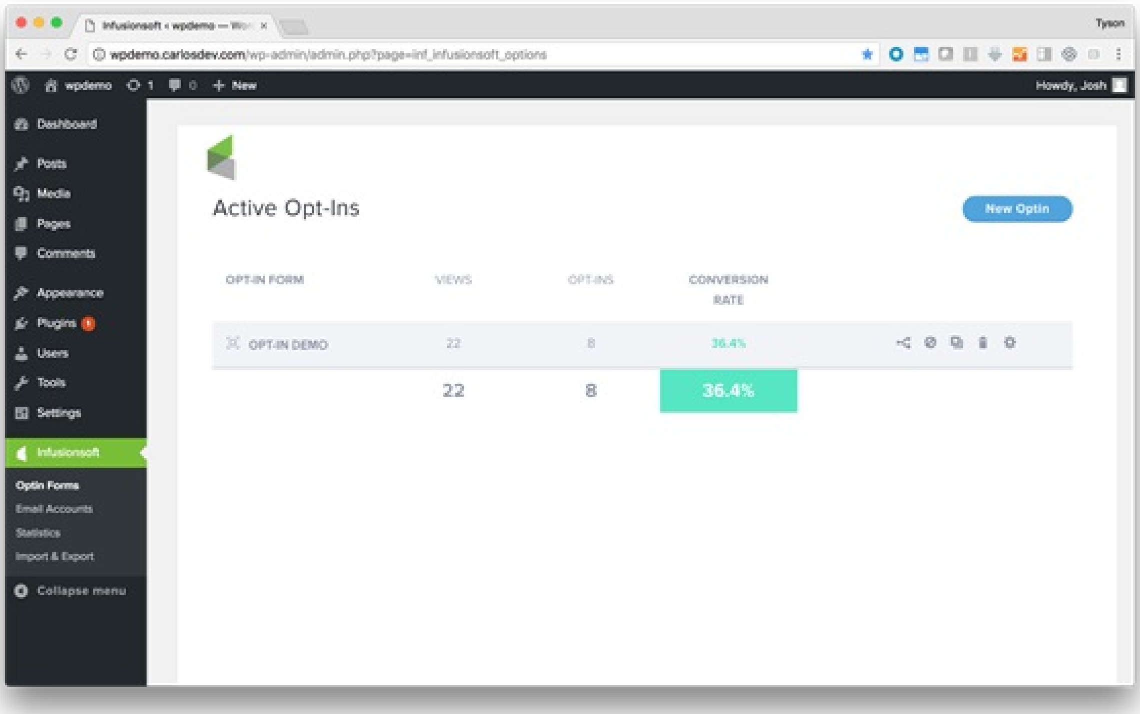
1. Sign in to your WordPress admin account

2. Within WordPress admin view, navigate to the Plugins tab on the sidebar

3. Click the Add New tab under the Plugins tab

4. Search for Infusionsoft Official Opt-In Forms from the search bar found on the top right corner of the WordPress plugin directory view

Sidebar Tab: Opt-in Forms



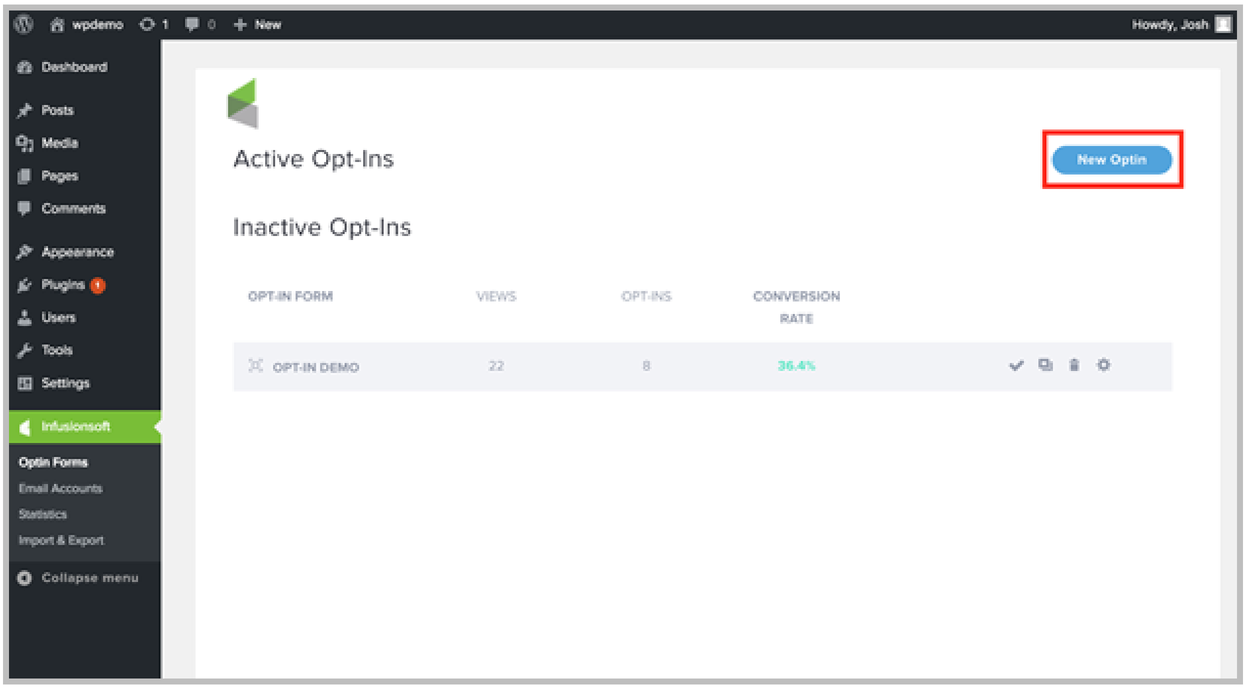
In this sidebar tab, you can:

- View all existing opt-in forms (active and inactive)
- View high-level statistics for all existing forms
- Create new opt-in forms
- A/B test two existing opt-in forms
- Deactivate existing forms
- Duplicate existing forms
- Delete existing forms
- Make changes to existing forms

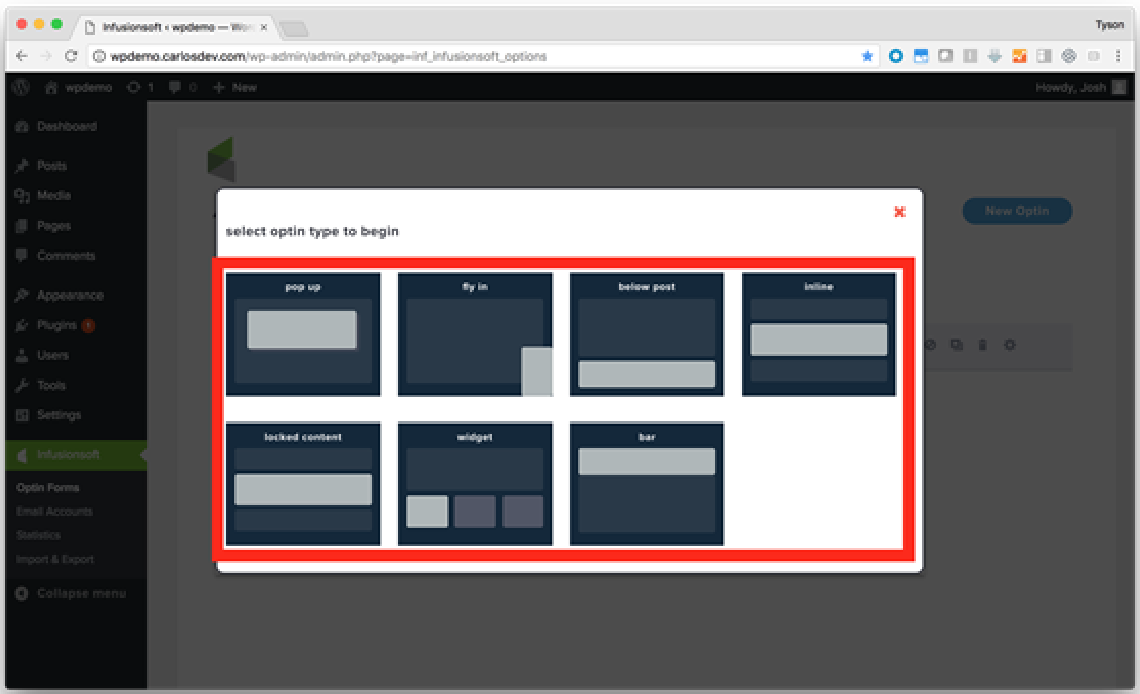
Creating a New Form

1. Click on the New Opt-In button on the top right corner of the page from the "Opt-In

Forms" sidebar tab



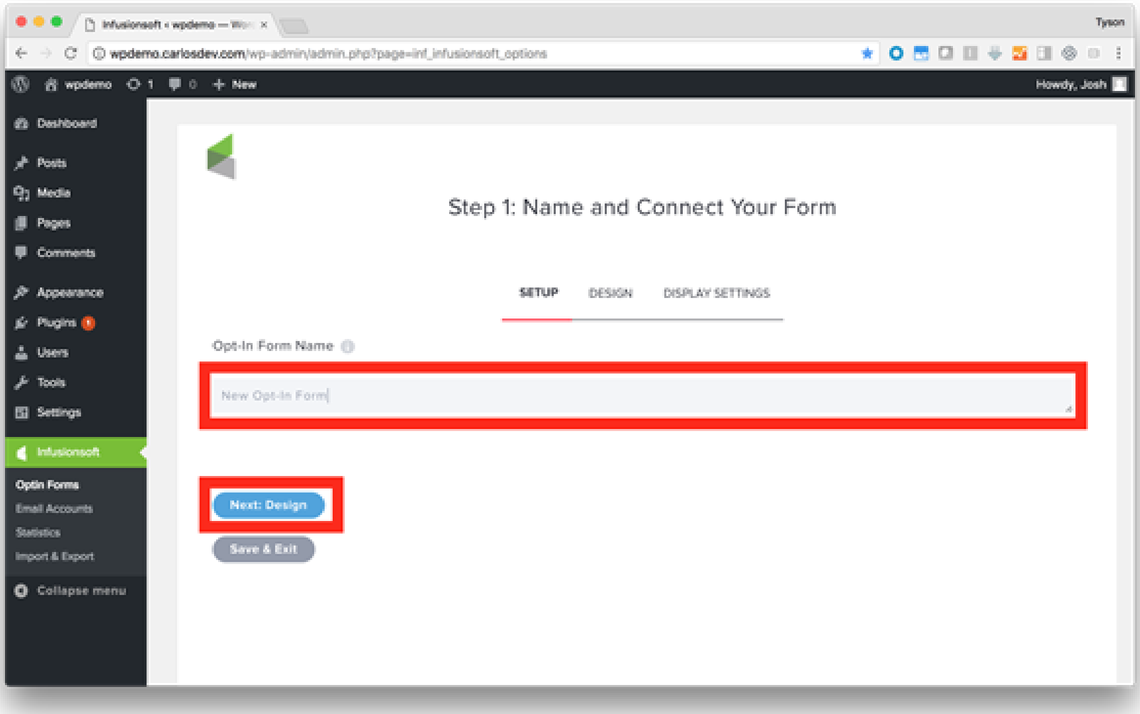
2. Choose what type of opt-in form you would like to use



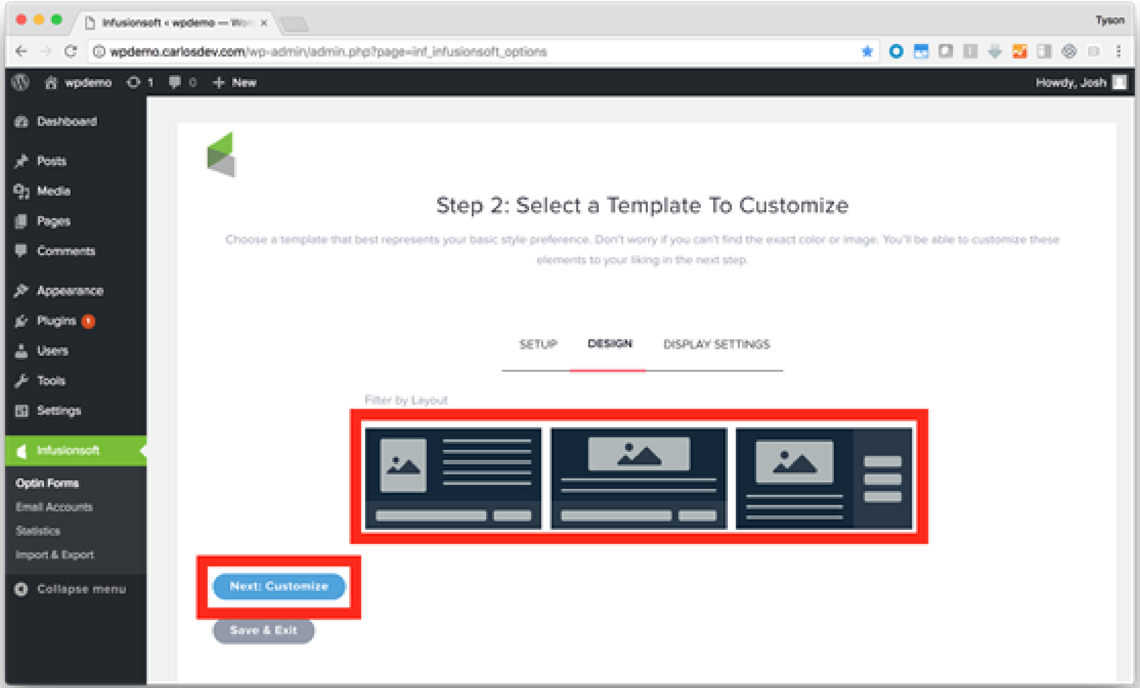
- Pop Up Opt-In Form: Prompt your visitors to opt in without annoying them. You can set Infusionsoft's Opt-In Forms to appear automatically after a specific amount of time, after visitors reach a particular point on your page, or even after visitors leave a comment or make a purchase.
- Fly In Opt-In Form: The slide-in form is the pop-up’s smooth, subtle cousin. It slides in at the bottom of your visitor’s screen and can be set to appear after a specific

time or at a specific point on the page.
  - Widget Opt-In Form: Use widget forms to create attractive opt-in forms for your sidebar, footer, or any other widget-friendly areas on your site.
  - Locked Content Opt-In Form: Offering valuable content in exchange for an email address is one of the most effective ways to grow your email list. Protected content forms allow you to offer content your visitors can “unlock” by opting in.
  - Below Post Opt-In Form: You can use “Below Content” forms to place an opt-in opportunity at the end of your blog posts or pages. Visitors who have read an entire post are highly engaged, so this is an effective way to turn that engagement into a conversion.
  - Inline Opt-In Form: Want to insert an opt-in form in the middle of a blog post, rather than the end? Inline forms make it easy. You can display these forms virtually anywhere you’d like on any post or page on your website.
  - Notification/Opt-In Bar: Increase your opt-ins, announce your promotions and drive traffic to the pages of your choice with our attention grabbing top-of-page banner.

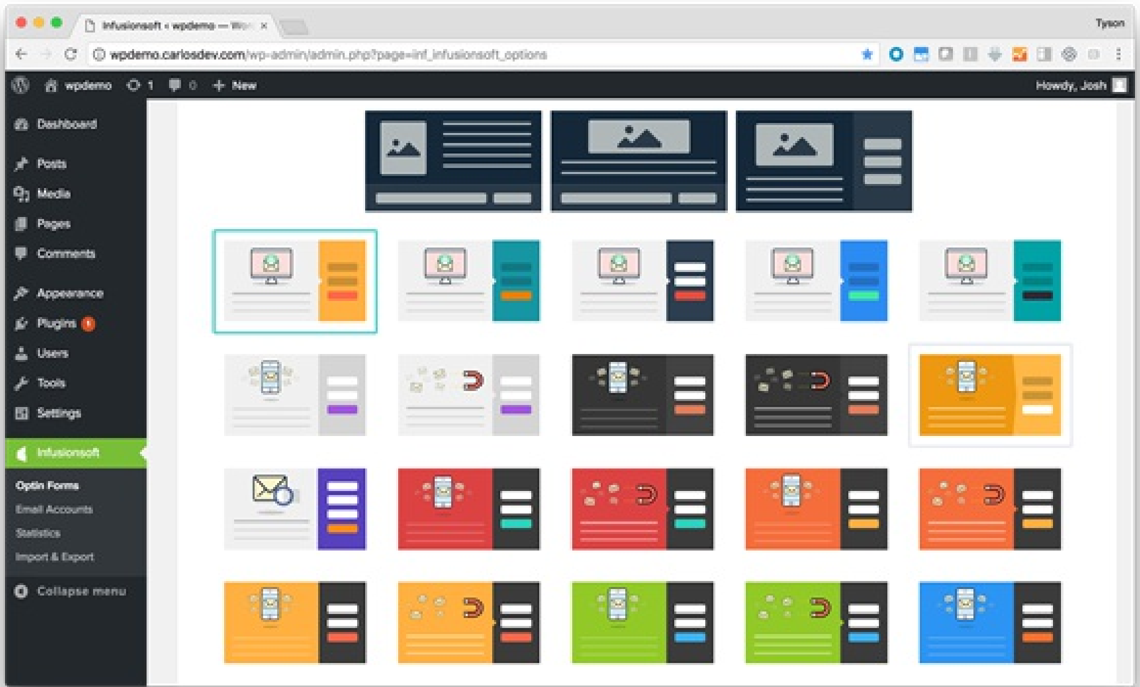
3. Enter a name for your opt-in form then click the Next: Design button to advance to styling your opt-in form or click the Save & Exit button to save the opt-in and return later to edit its design & display settings.

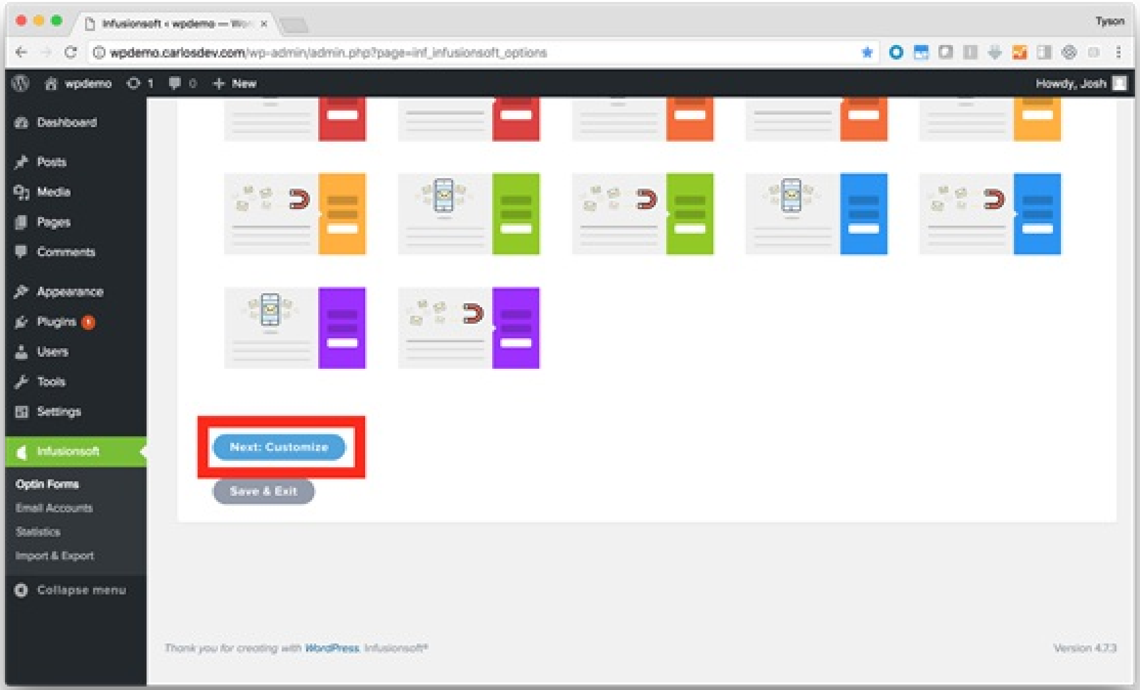


4. Choose one of the three form layouts then click the blue Next: Customize button at the bottom.



5. Choose one of any pre-designed templates based on preferred color and style. You can alter these colors after a template has been selected. Once you select a template, you will automatically be taken to the bottom of the screen to click the blue Next: Customize button again to advance to the next part of customization.

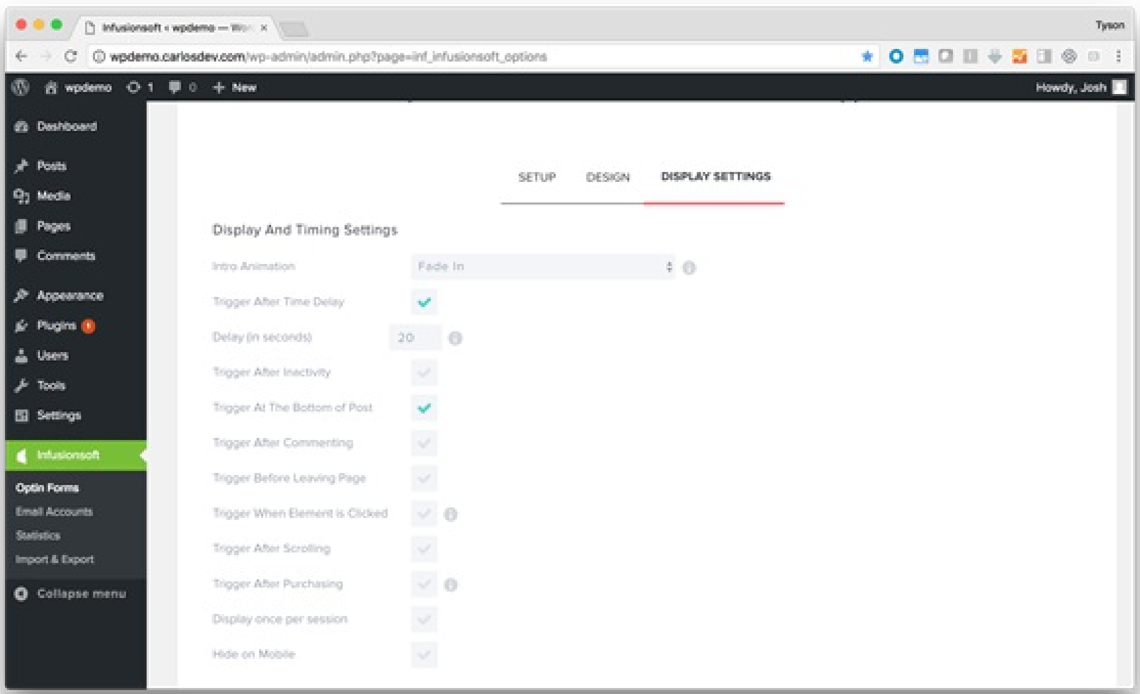




6. This next part of the design process allows you to access the next layer of customization. You may customize the following on your opt-in form:
    - Copy
    - Opt-in form header
    - Opt-in form body/message
    - Image
    - Orientation of the image on the opt-in form
    - Upload a personalized image on the opt-in form
    - Animation of the image load on the opt-in form
    - Ability to hide the image on mobile
    - Styling
    - Background color
    - Copy font
    - Copy color
    - Corner styles
    - Border orientation
    - Border color
    - Border styles
    - Field setup
    - Form orientation
    - Form fields to include (no name, single name, first & last name)
    - Email placeholder text
    - Button text
    - Opt-in consent checkbox
    - Field styling

- Field orientation
- Field corner style
- Form text color
- Form background color
- Form button color
- Form button text color
- Form edge style
- Footer copy
- Successful submission copy
- URL redirect upon successful form submission
- Customize CSS

7. After customizing the above settings, you can click the blue Next: Display button to customize the following elements of the opt-in form:

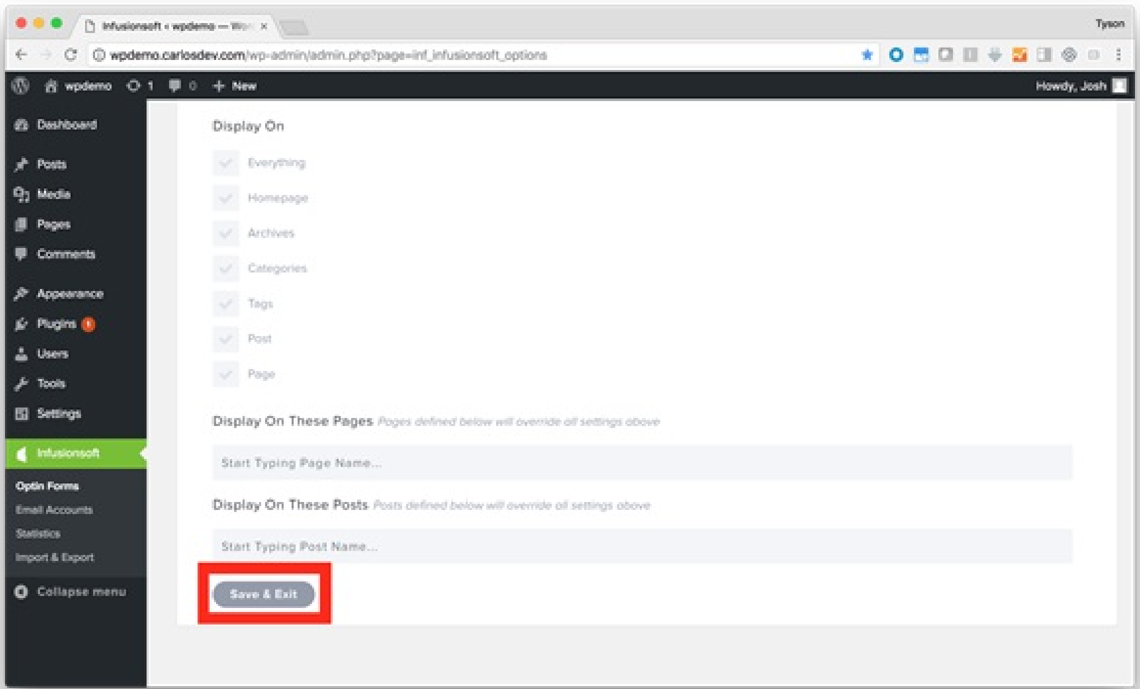


- Display and Timer Settings
    - Intro animation
    - Trigger after time delay and how long
    - Trigger after page inactivity
    - Trigger when users arrive to bottom of a post
    - Trigger upon site visitor submission of a comment
    - Trigger prior to a visitor leaving a page
    - Trigger when a page element is clicked (Adds new onclick shortcode option to Infusionsoft editor when editing a page / post)
    - Trigger after scrolling a page

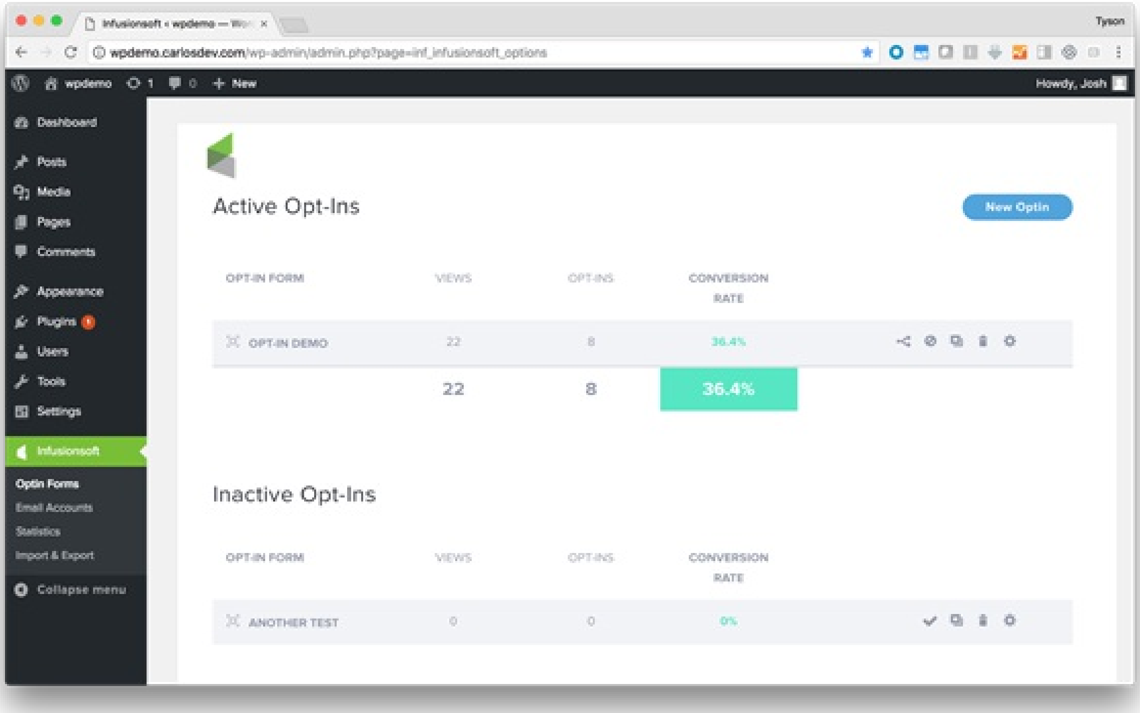
    - Trigger after purchasing an item from a WooCommerce page (Display on "Thank you" page of WooCommerce after purchase)
    - Limit to one trigger/display per session
    - Ability to hide when viewed on mobile device

  - Where to display the opt-in form. Note that the fields below these checkboxes are dynamic according to display options chosen.
    - Everywhere on site
    - The home page
    - Archives page
    - Certain page or post categories
    - With specified shortcode tags
    - Specified pages
    - Specified posts

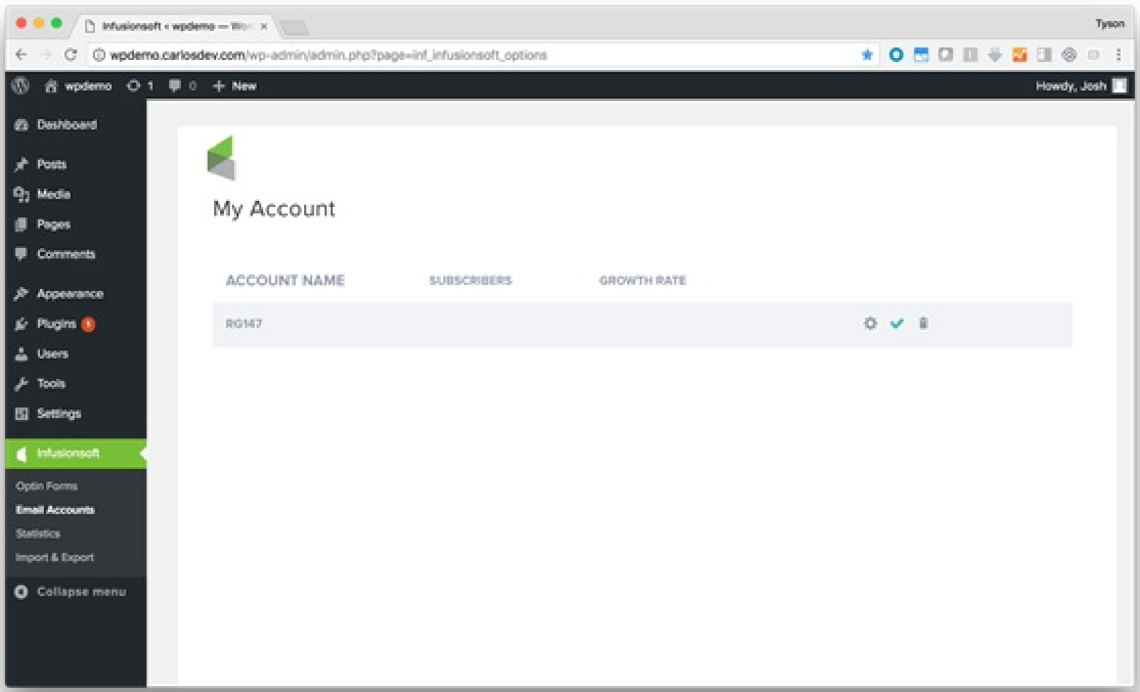
8. Once you have customized the above settings, you have completed the form setup process! To finalize, you must click the gray, Save & Exit button at the bottom of the Display Settings tab.



9. After successfully configuring/customizing your opt-in form, you will be taken back to the Opt-In Forms tab and your newly created opt-in form will display in the list of opt-in forms. This list can be delineated should you make some opt-in forms inactive (see below).



Sidebar Tab : Email Accounts



In this sidebar tab, you can:

- Initialize a connection to their Infusionsoft account (on first visit)
- View the status of the connection to their Infusionsoft account
- Deactivate the existing connection to their Infusionsoft account

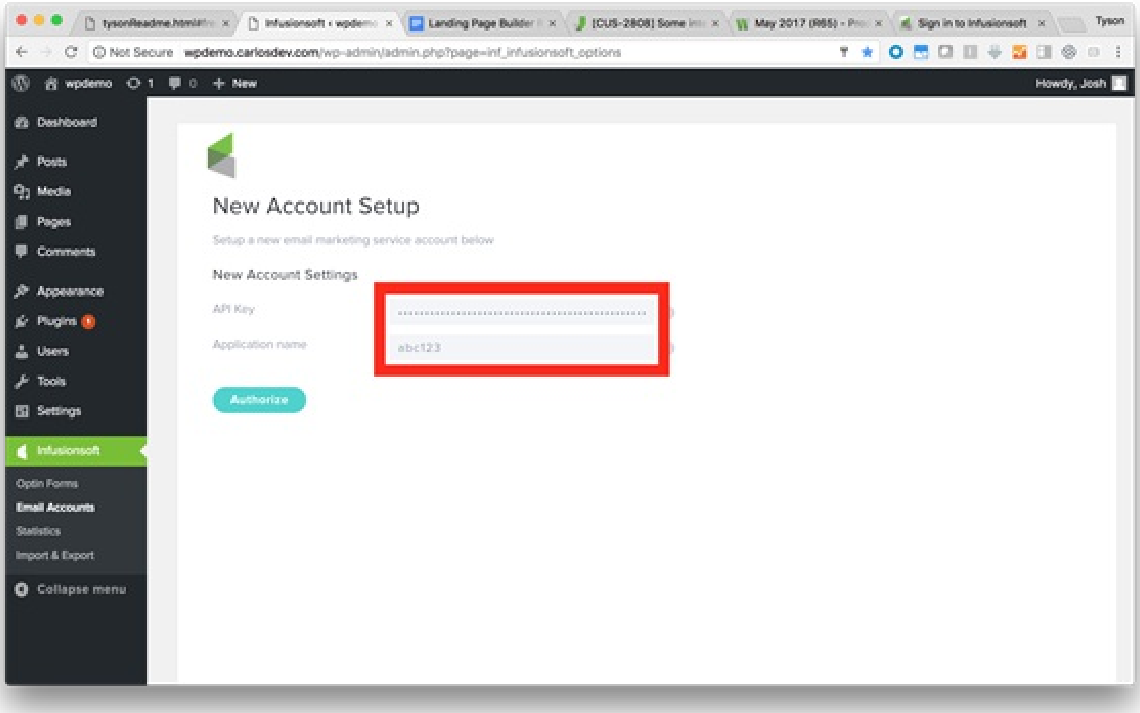
To connect to an Infusionsoft account:

1. Navigate to where your API key is located inside of your Infusionsoft application. To generate an API key, follow these instructions.

2. Copy your 32-digit encrypted API key.

3. Paste this key value into the "API Key" field within the WordPress plugin.

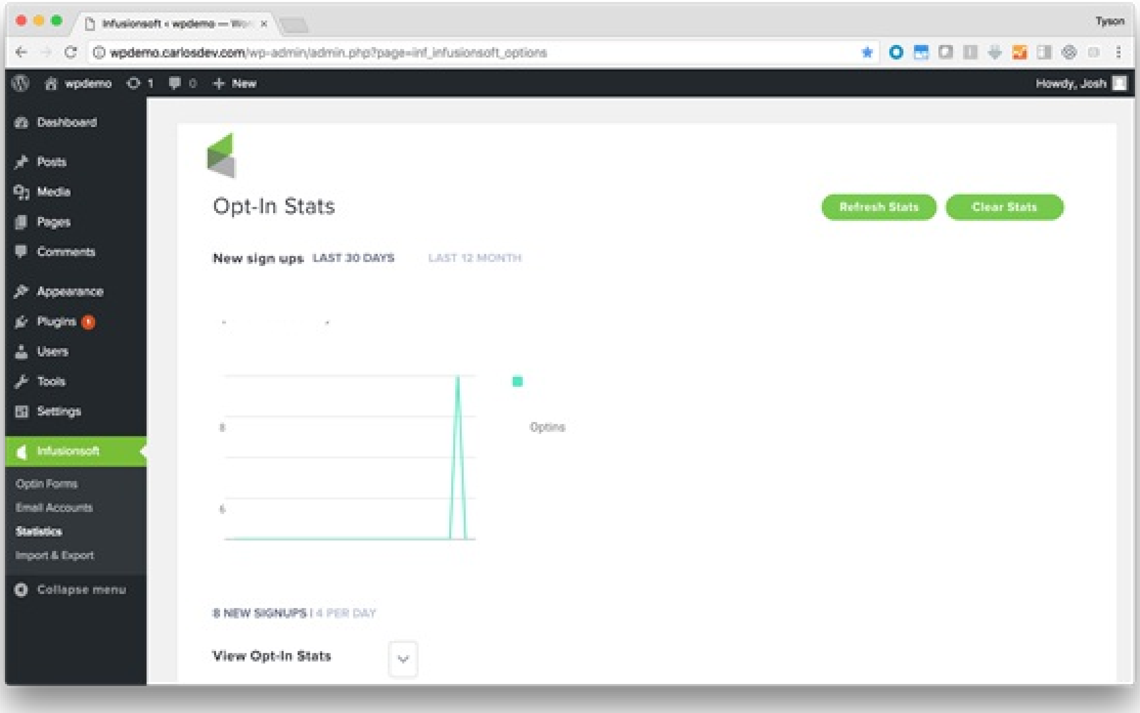
4. Enter your Infusionsoft application name. For example, if your Infusionsoft application URL is abc123.infusionsoft.com, then abc123 is your application name.

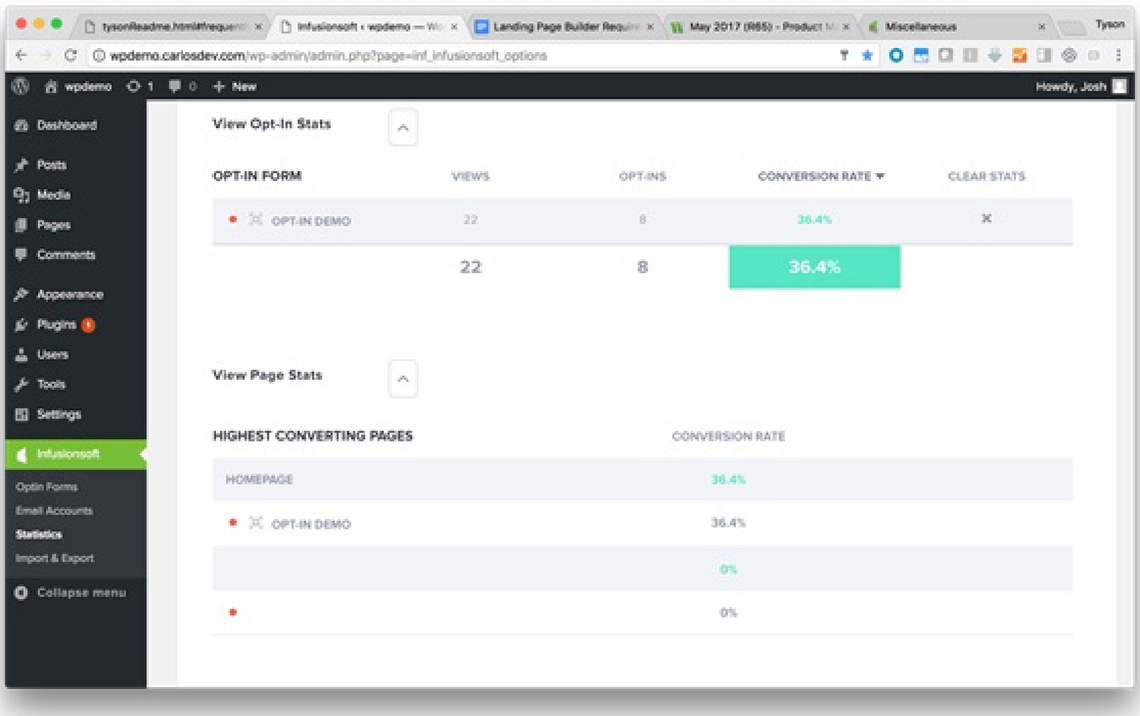


5. Click the Authorize button.

6. Click the Save & Exit button.

Sidebar Tab : Statistics

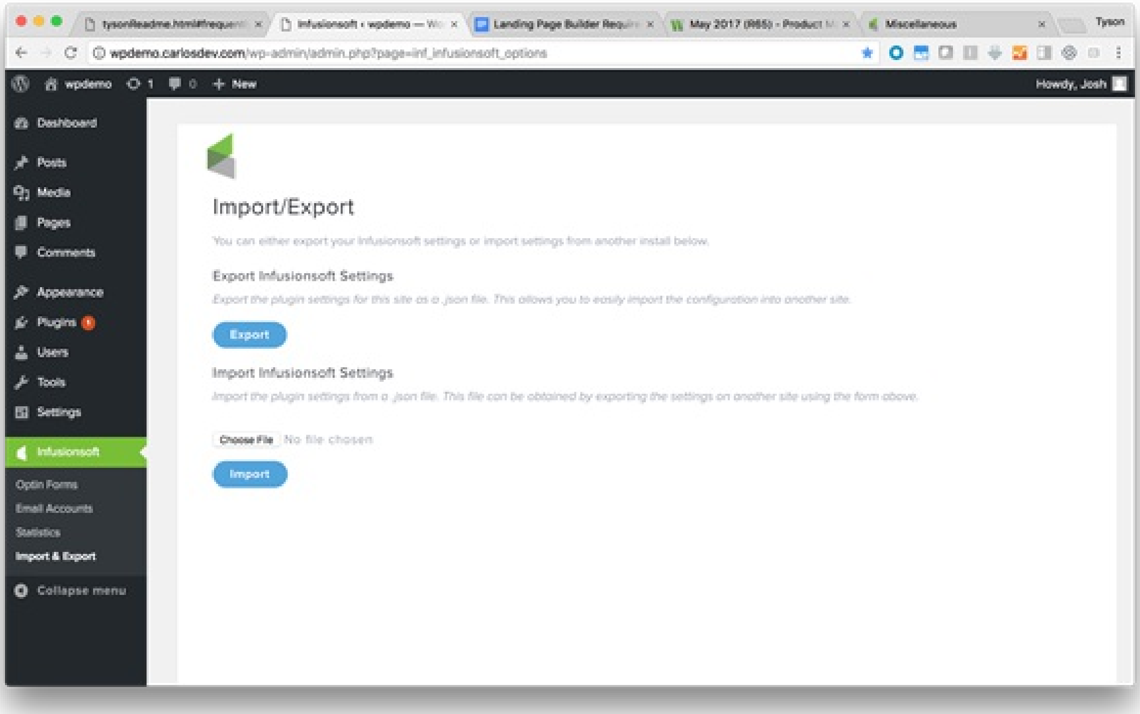




In this sidebar tab, you can:

- View aggregate statistics for all opt-in forms over last 30 days and last 12 months
- Manually refresh the stats data
- Clear out all stats data
- View form views, opt-ins, and conversion by each existing opt-in form
- View conversion statistics by form within any given page of the users WordPress site–ideal for optimizing placement of opt-in forms by highest converting page

Sidebar Tab : Import & Export



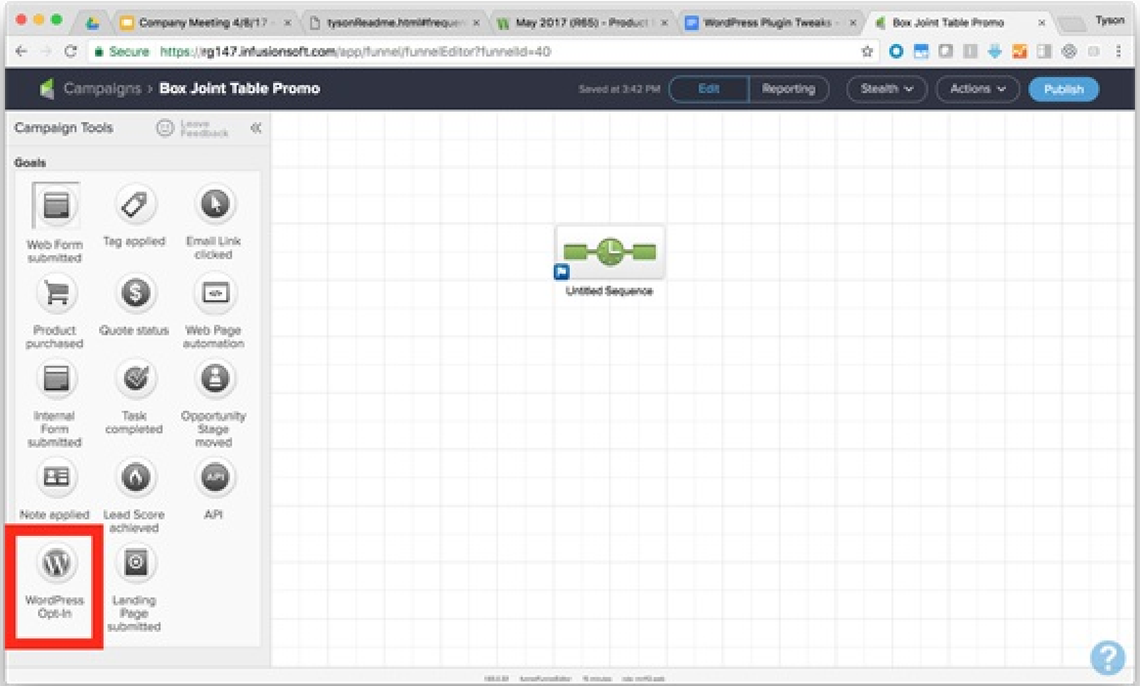
In this sidebar tab, you can:

- Export an existing opt-in form to share with another user
- Import an existing opt-in form received from another user

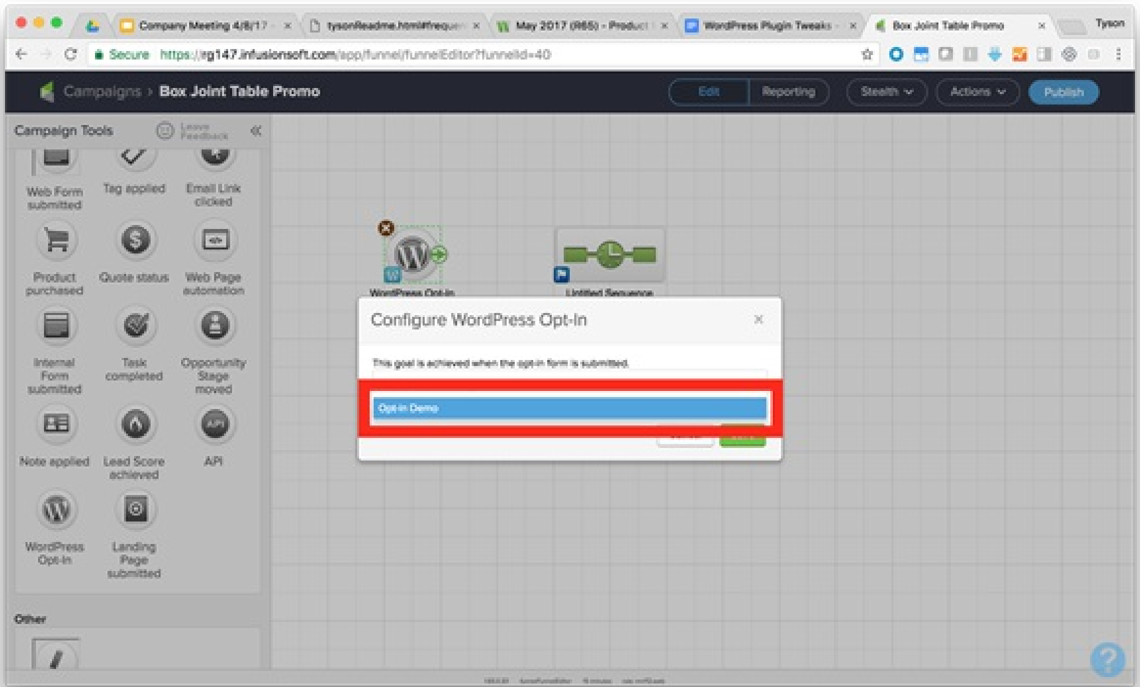
Infusionsoft Setup

1. Navigate to campaign builder

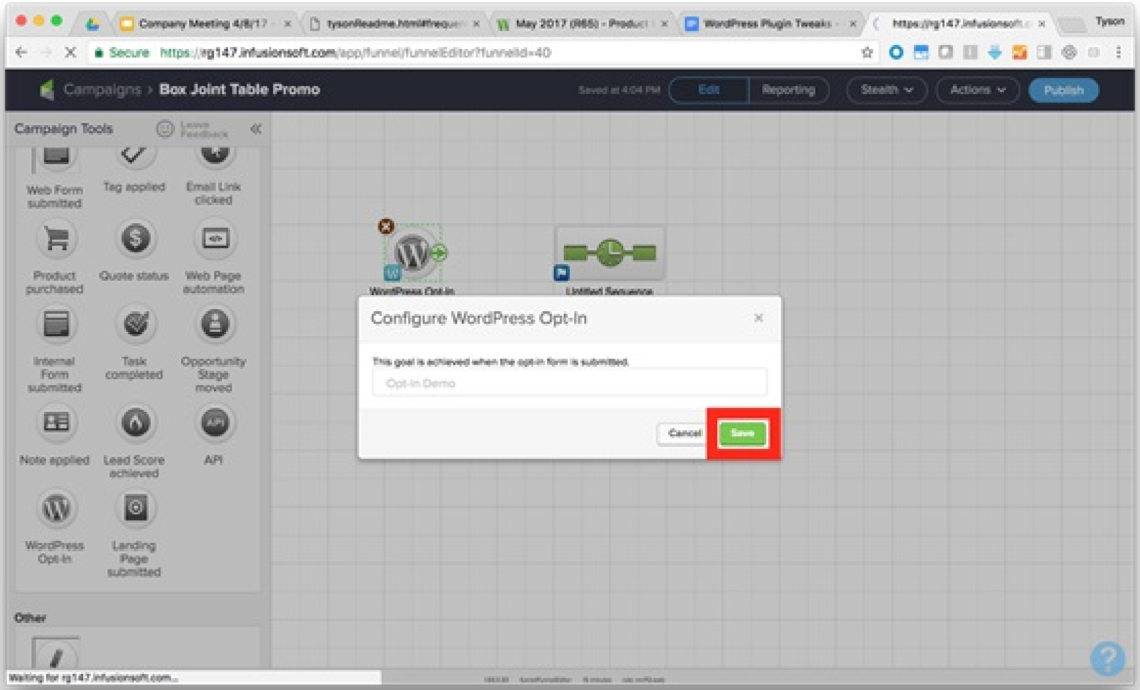
2. From the campaign goal section on the left-hand sidebar, locate the "WordPress Goal" goal and drag it out onto the campaign canvas.



3. With the "WordPress Goal" on the canvas, double click on the goal to designate which Infusionsoft WordPress opt-in form completes this campaign goal. Select the name of the opt-in form from the dropdown list. If you have a long list of opt-ins, begin typing the name of the desired form and you will be taken to the form in the list.



4. Once the desired opt-in form is selected, you can finalize this configuration by clicking the green Save button.



5. The last step to finalize the WordPress goal completion setup is to ensure that the goal is connected to a sequence and the subsequent sequence is properly configured to initiate automation for contacts completing the WordPress campaign goal.

Using a different version of Infusionsoft? Click Here to learn more

Supported Languages For External Pages

Last Modified on 06/18/2018 4:24 pm MST

Supported Languages

Infusionsoft has support for the following languages, on external pages:

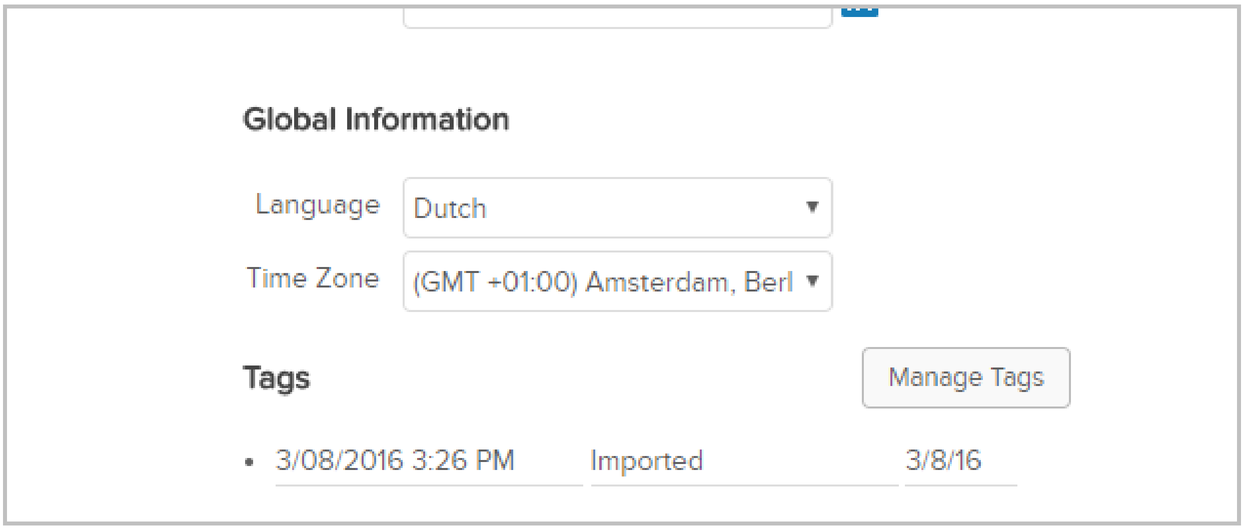
- English
- German
- French
- Spanish
- Brazilian Portuguese
- Italian
- Japanese
- Dutch
- Arabic
- Swedish

These pages will display based on the user's browser language settings. The external page will default to English if the language is not yet supported in Infusionsoft. These pages include: Shopping Cart, Order Forms, Quotes, Invoices, Email Update Page, Email Opt-Out Page, and some emails (Quotes, Invoices, and Email Confirmation.)

Quotes/Invoices/Emails

Please Note! This doesn't work using *legacy* invoice settings

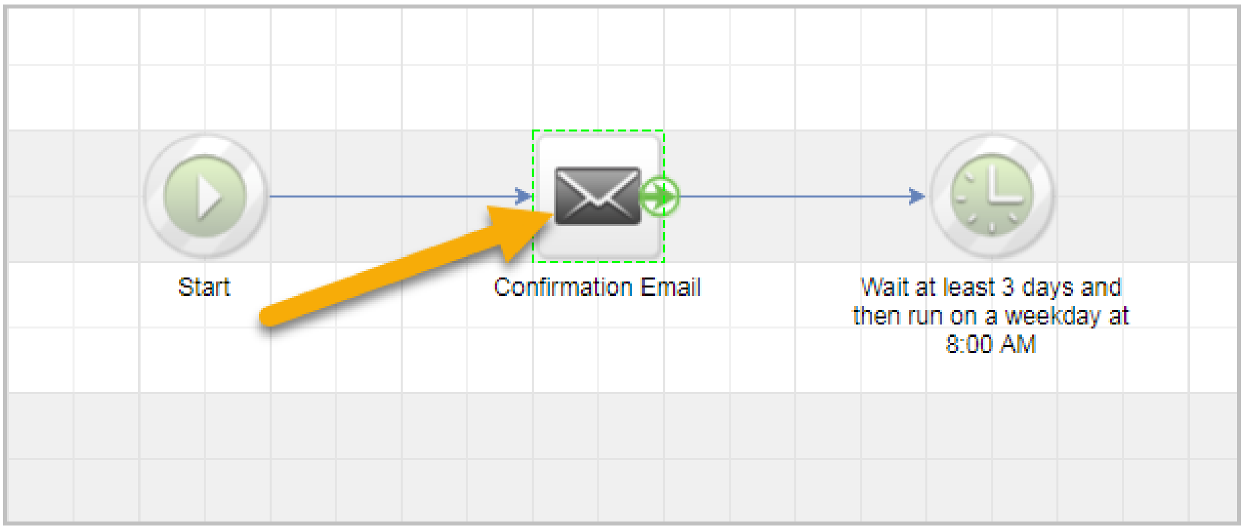
On the contact record, under Global Information, make sure you have the correct language set for the contact in the drop-down menu



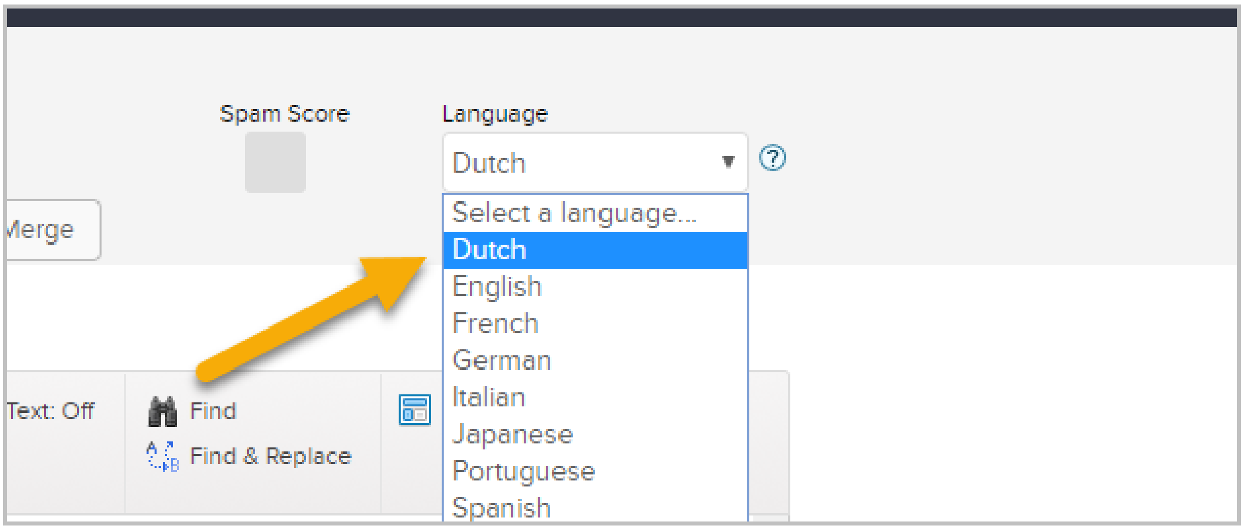
On the contact record, under the **Orders** tab, select a recent order or add a new order. In the order, select **Send Invoice.** The invoice email content will be rendered based on the language on the contact record. If we do not yet support the language, it will be rendered in English.

Email Confirmation Sequences

1. While In Campaign Builder, in the email confirmation sequence, click on the **Confirmation Email** part of the sequence.



2. Once you are in the builder, select the language from the drop-down menu



3. All hard-coded content will be translated immediately. Any custom content will not be translated automatically.

行ってしまうのは残念です

登録解除の理由をお知らせください：

- このようなメールをこれ以上受け取りたくありません
- 私はこの送信者からのメール受信を希望しませんでした
- 思っていた内容と違います
- 私は思っていた以上にメールを受信しました
- このメールはスパムであり、報告されるべきです
- 私は以前に登録削除をしました

追加コメント...

登録解除したいです

Powered by: Infusionsoft.

Asia Pacific Countries (APAC)

Last Modified on 08/27/2018 12:20 pm MST

Australia	Laos
Bangladesh	Malaysia
Cambodia	Micronesia
China	Myanmar
Fiji	New Zealand
French Polynesia	Pakistan
Guam	Singapore
Hong Kong	Taiwan
India	Thailand
Japan	Vietnam
Korea - South Korea	

May 8 - How to Verify Suspected Bad Contacts

Last Modified on 07/12/2018 11:08 am MST

Situation overview

As you may know, last week we identified that your Infusionsoft app contained contacts that were created by malicious, automated robots (bots) targeting major email service and marketing automation providers. The contacts were created by the bots submitting invalid web forms. (a form submitted by someone other than the owner of the email address), and it resulted in unsolicited emails being sent to these contacts from your account. This could have a negative impact on email deliverability for all Infusionsoft customers, including you, which is why we are writing you today.

What steps are we taking to protect email deliverability for you and all Infusionsoft users?

- Tuesday, May 16: Beginning at 9am PDT, we will start opting out suspected bad contacts that have not been verified by you to protect email deliverability to all your valid contacts. If you don't want any suspected bad contacts opted out automatically, please take the steps below to verify if they are good or bad contacts.
- We have taken great care to ensure your valid contacts have not been selected. For example, we identified email addresses that had made purchases, double opted-in, opened emails, or clicked links in emails from your application. None of these email addresses were included in the group designated as "suspected bad" contacts.

What is a suspected bad contact?

We designate a contact as "suspected bad" if the contact was submitted from a suspect IP address or the same email address was submitted to a number of different apps using different names.

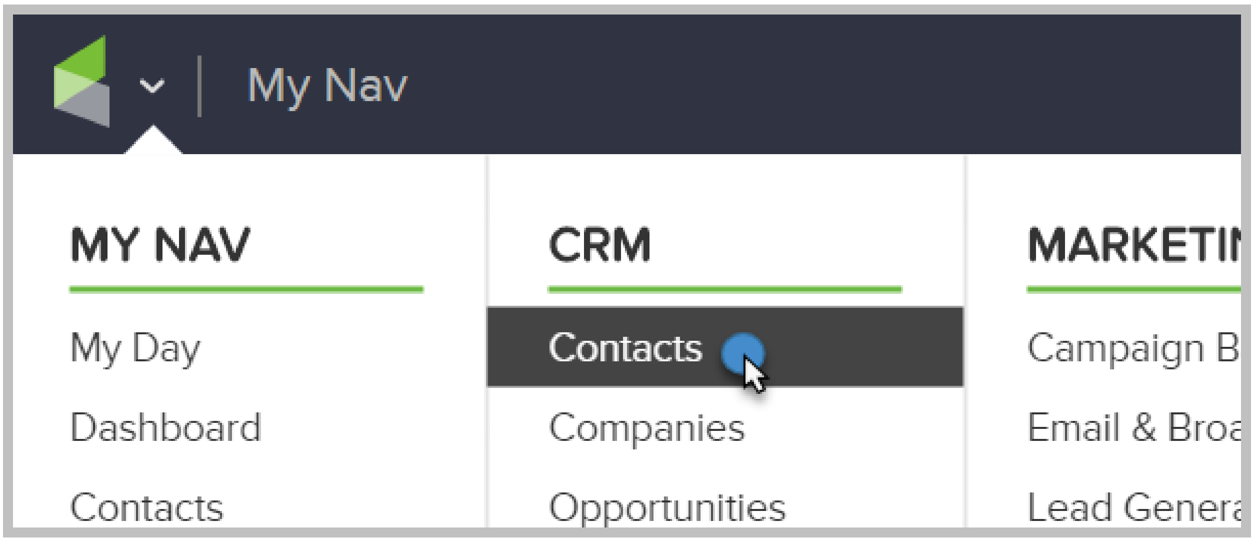
How do I find the suspected bad contacts you are opting out?

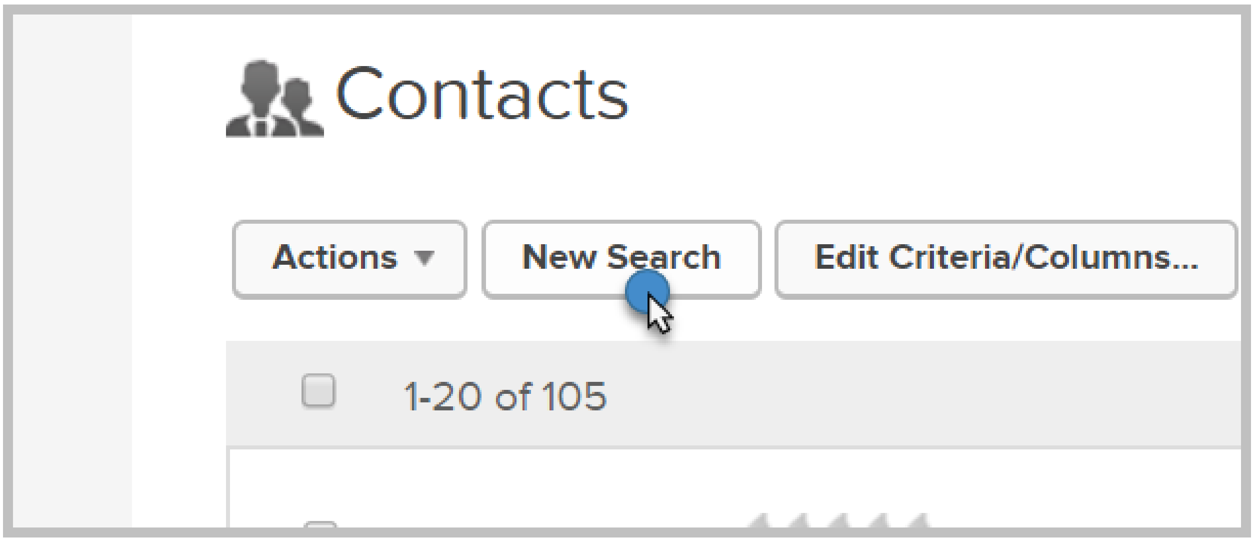
Tuesday, May 9: Beginning at 9am PDT, you can find the suspected bad contacts we identified by performing a contact search in your app.

If you don't want any suspected bad contacts opted out automatically, please take these steps to verify if they are good or bad contacts.

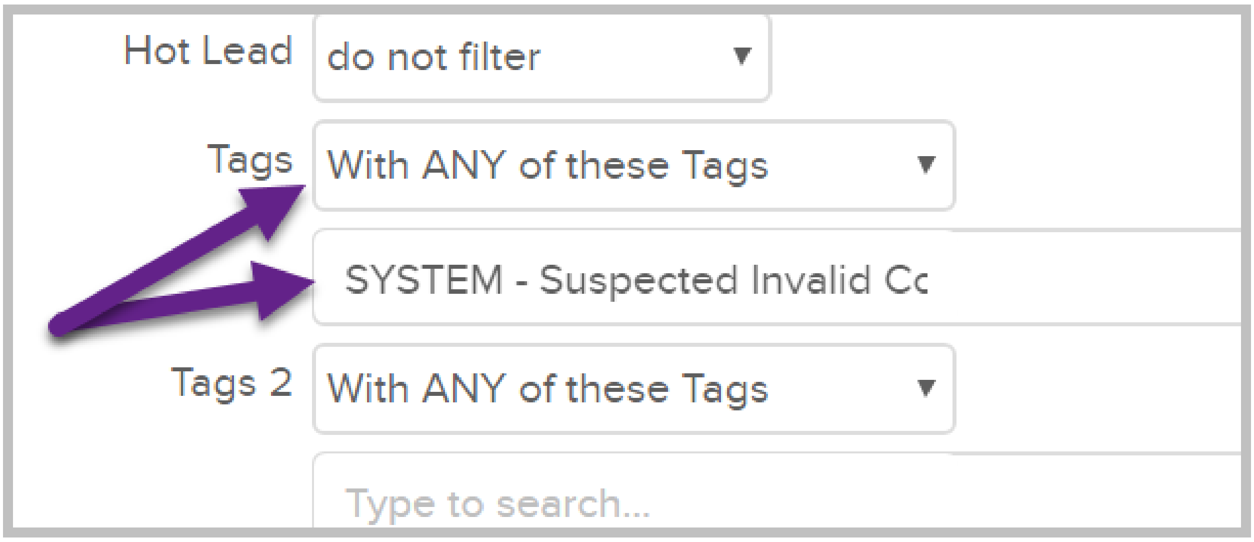
To find SYSTEM - Suspected Invalid Contact contacts, please review and remove tag if wrongly identified:

1. Navigate to CRM > Contacts. (If previous search results display, press the New Search button)

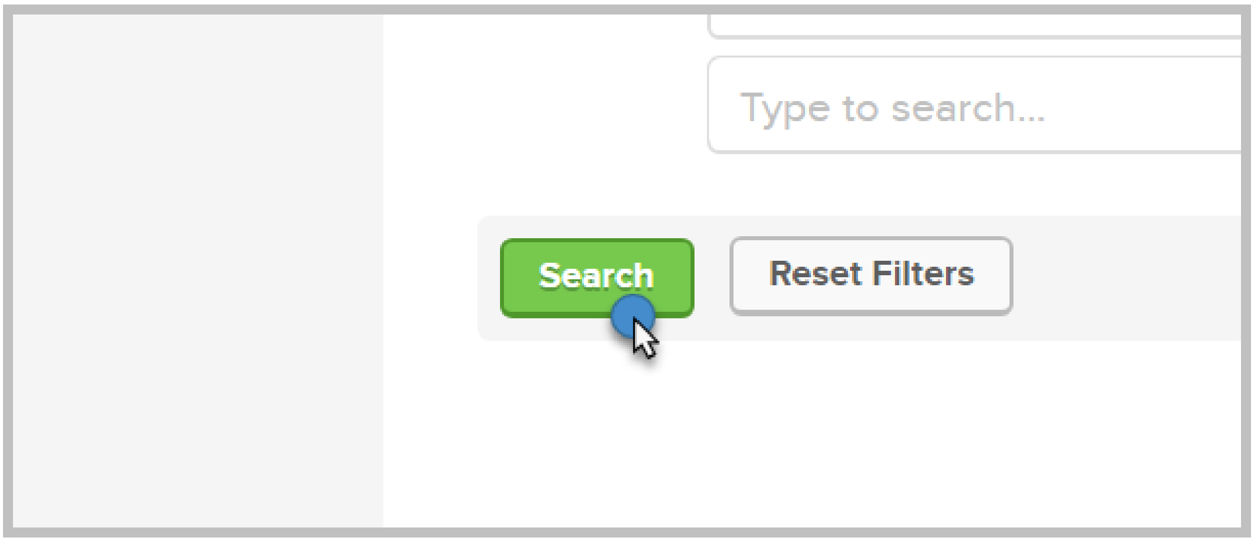




2. Find the Tags criteria section. Choose With ANY of these Tags from the drop down and then search for the tag SYSTEM - Suspected Invalid Contact



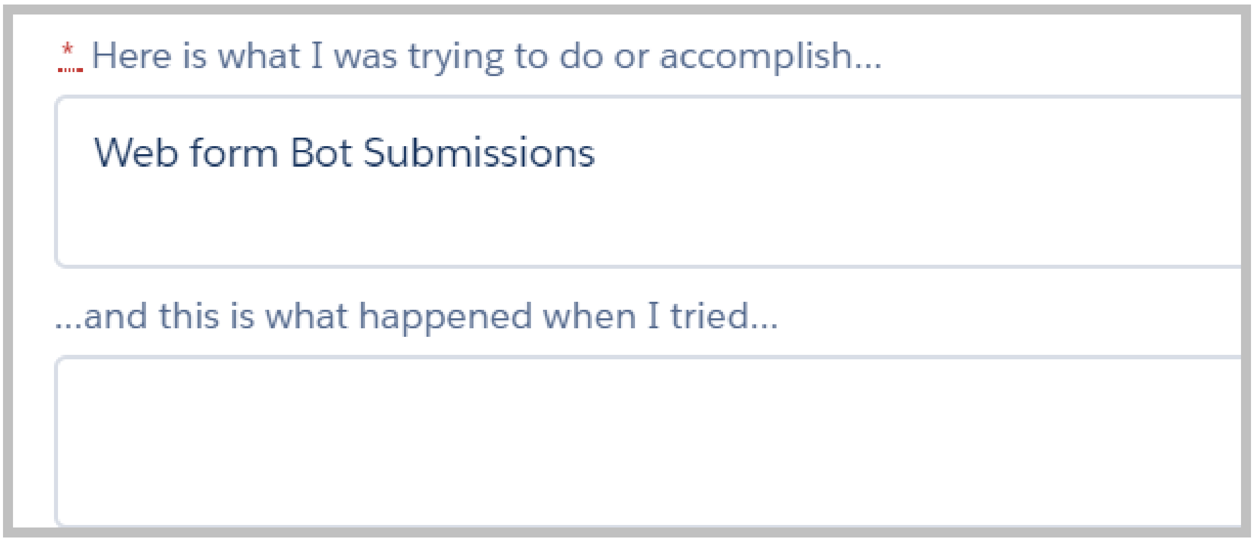
3. Press the green Search button to get results



4. Please review and remove the tag if wrongly identified

Please verify the suspected bad contacts no later than Monday, May 15, at 9am PDT, as we will begin an automatic opt-out of any contacts you have not verified after that time.

If you have additional questions about this change, please submit an online support case, and enter the following in the "trying to accomplish" field, Web Form Bot Submissions.



We sincerely apologize if this situation has hurt your ability to connect with your leads and customers. Our Operations and Engineering teams are working hard to resolve this issue for you as quickly as possible, and we have implemented security measures to reduce the likelihood of this occurring in the future.

Thank you,
The Infusionsoft Team

Using a different version of Infusionsoft? Click Here to learn more

Discontinuing The 7 Day Rule FAQ

Last Modified on 07/23/2018 1:17 pm MST

Important Note! The 7 Day Rule will be eliminated from all apps by Jan 10th 2018. Your account may not be affected until then. Please test your account before assuming the 7 Day Rule is gone.

Infusionsoft has discontinued the "7-day rule" behavior in Campaign Builder. After receiving customer feedback, we have found that this behavior was not overall beneficial to building and maintaining campaigns. The 7-day rule triggered any added processes published to an existing sequence to run on any contact currently in the sequence (Active or Queued) to have the added process run automatically on their contact record at the point the update is published to the campaign.

Below are some Frequently Asked Questions regarding this change, and a link to an additional resource to learn more.

1. **How did the 7-day rule work in a campaign sequence?**

   If you published an additional process to a campaign sequence (e.g. adding an additional email to an existing sequence) any contacts currently in the sequence (**Active or Queued**) that would have reached this new step in the last 7 days would have the process automatically ran at the point of publishing the update to the sequence.

2. **If I publish an addition to a sequence, what will happen now that the 7-day rule has been discontinued?**

   Only contacts that have not reached the point in the sequence where the addition was made will have the process ran. Contacts that are past the point of the addition to the campaign sequence, or contacts that are queued at the end of the sequence will NOT have any additional processes ran on their contact record, if an update is published to an existing sequence.

3. **What if I need to run these additional processes on contacts that may have already passed a certain point in my sequence?**

These processes would need to be run manually, by pulling contact sequence reporting for the desired contacts (active and queued). Contacts can be selected and processes can be run via the 'Actions' drop-down.

Pro-Tip: If the addition is an email, consider sending the email as a 'Broadcast' to the contacts that have already passed the point of the addition to the sequence.

Using a different version of Infusionsoft? Click Here to learn more

May 8 - How to View Known Bad Contacts and Verify Suspected Bad Contacts

Last Modified on 07/12/2018 11:08 am MST

Situation overview

As you may know, last week we identified that your Infusionsoft app contained contacts that were created by malicious, automated robots (bots) targeting major email service and marketing automation providers. When the bots submitted invalid web forms (a form submitted by someone other than the owner of the email address), it resulted in unsolicited emails being sent to these contacts from your account. This could have a negative impact on email deliverability for all Infusionsoft customers, including you, which is why we are writing you today.

What steps are we taking to protect email deliverability for you and all Infusionsoft users?

- Monday, May 8: Today at 9am PDT, we began opting out the known bad contacts we identified in your app, preventing any further communication to these emails.
- Tuesday, May 16: Beginning at 9am PDT, we will start opting out suspected bad contacts to protect email deliverability to all valid contacts. If you don't want any suspected bad contacts opted out automatically, please take the steps below to verify if they are good or bad contacts.
- We have taken great care to ensure your valid contacts have not been selected. For example, we identified those email addresses that had made purchases, double opted-in, opened emails, or clicked links in emails from your application. None of these email addresses were included in the groups designated as, "known bad" or "suspected bad" contacts.

What is a known bad contact?

We designate a contact as “known bad” if the first and last names are clearly not valid names.

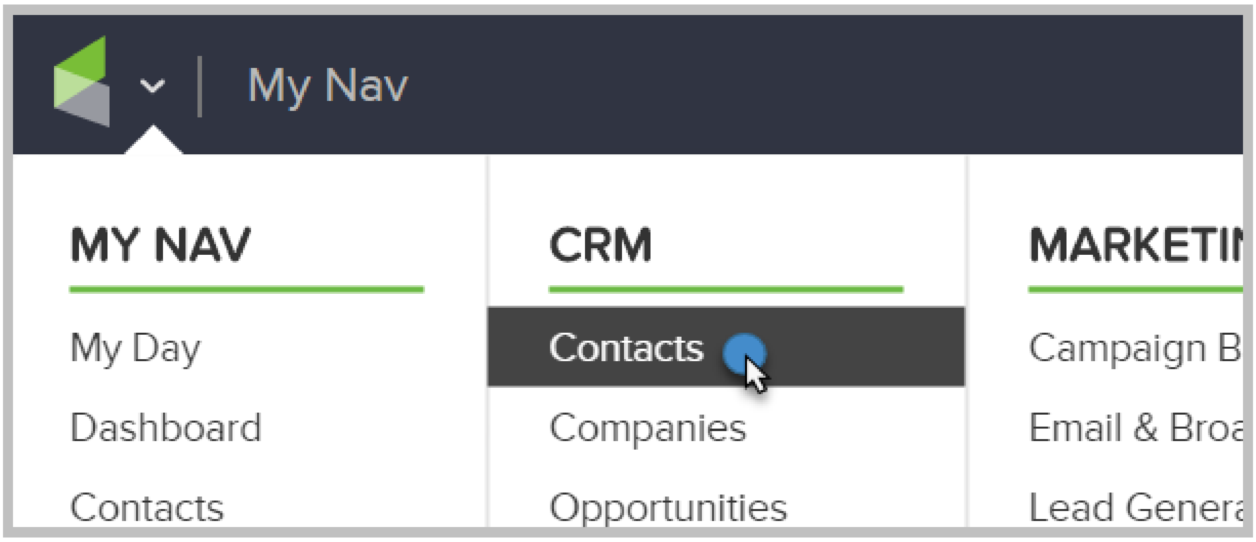
What is a suspected bad contact?

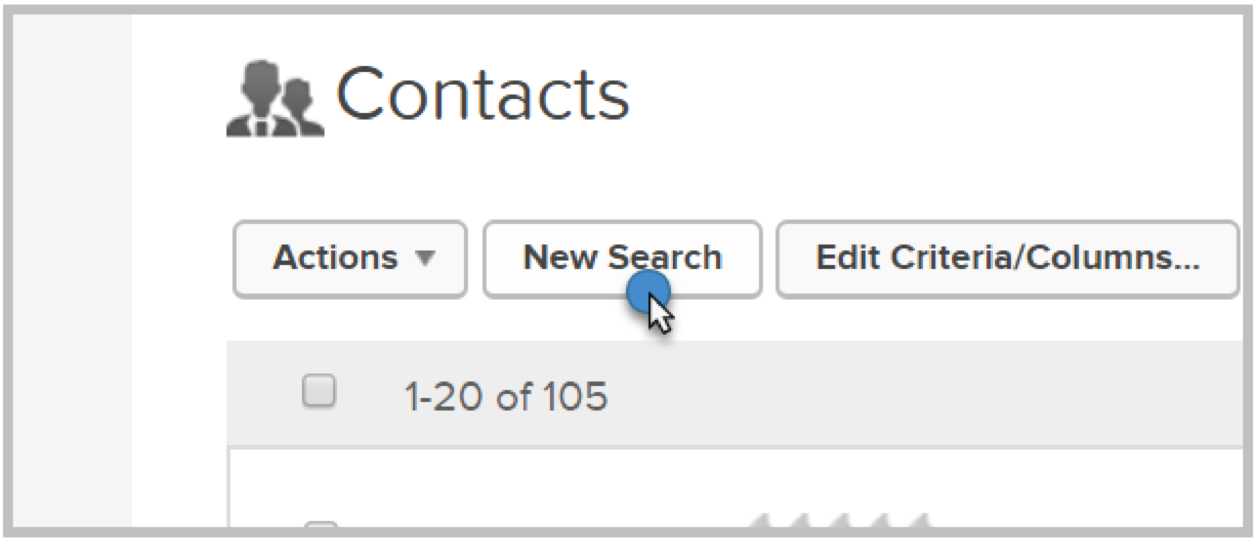
We designate a contact as “suspected bad” if the contact was submitted from a suspect IP address or the same email address was submitted to a number of different apps using different names.

How do I find the known bad contacts you are opting out?

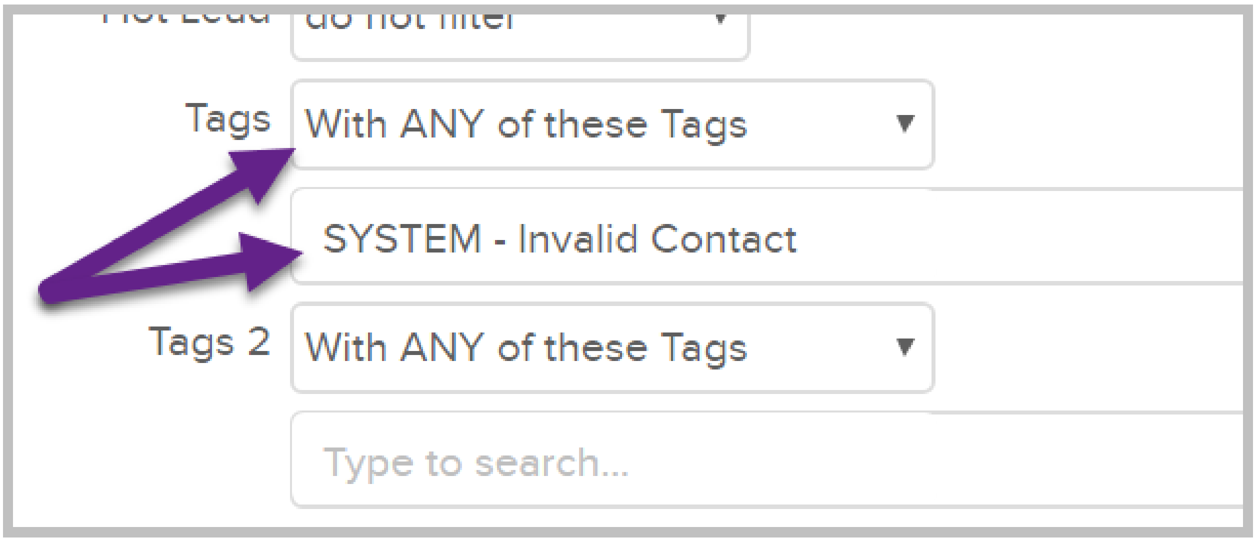
Tuesday, May 9: Beginning at 9am PDT, you can find the known bad contacts we opted out by performing the following steps in your app. To find SYSTEM - Invalid Contact records, run the following contact search:

1. Navigate to CRM -> Contacts. (If previous search results display, press the New Search button)

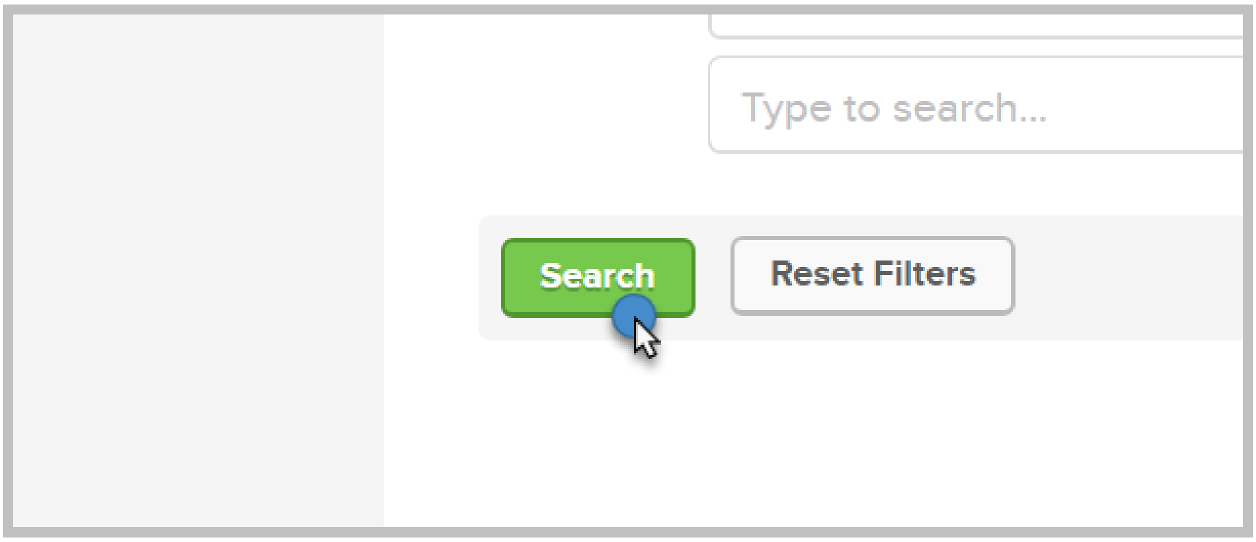




2. Find the Tags criteria section. And choose With ANY of these Tags from the drop down and then search for the tag SYSTEM - Invalid Contact



3. Press the green Search button to get results



4. If desired, you can delete these contacts from your database. These contacts should not be re-opted in as any further marketing to them would be unsolicited email

How do I find the suspected bad contacts you are opting out?
Tuesday, May 9: Beginning at 9am PDT, you can find the suspected bad contacts we opted out by performing a contact search in your app. If you don't want any suspected bad contacts opted out automatically, please take these steps to verify if they are good or bad contacts. To find SYSTEM - Suspected Invalid Contact contacts, please review and remove tag if wrongly identified:

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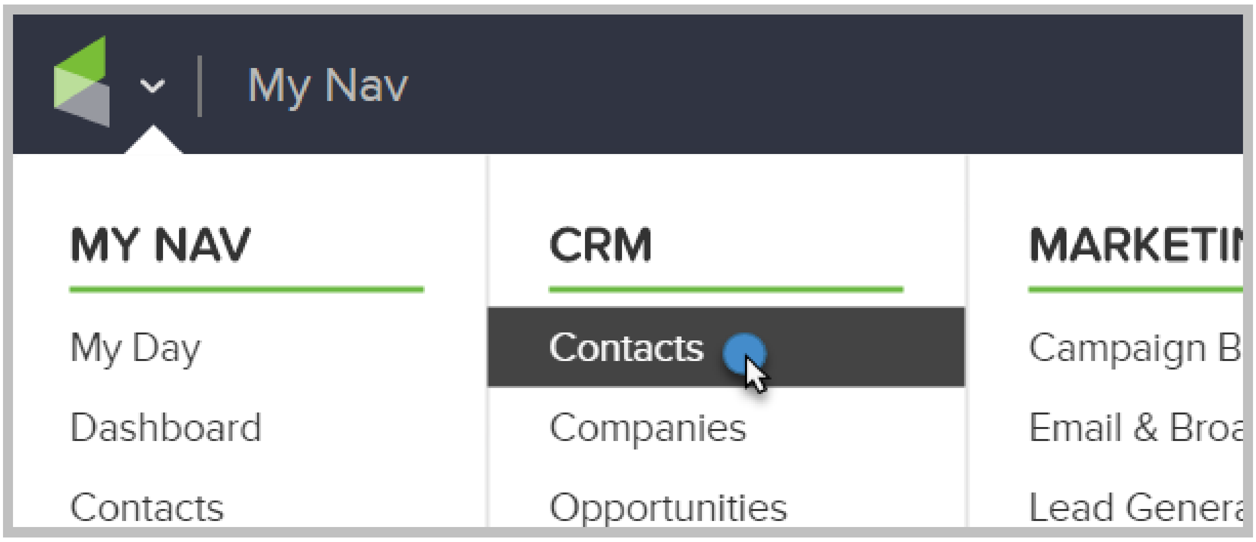

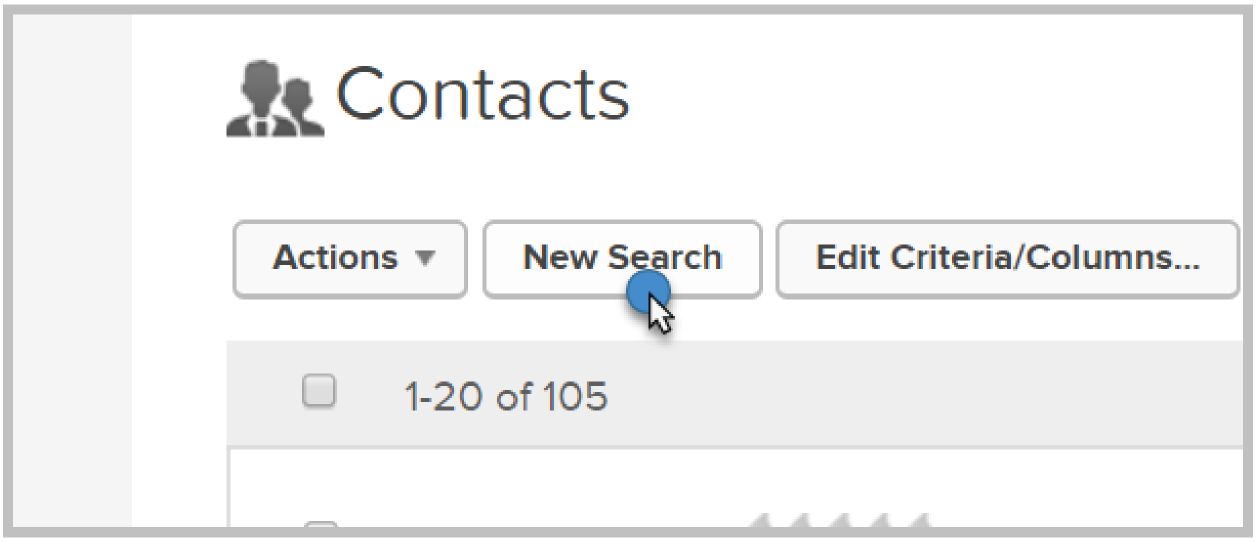

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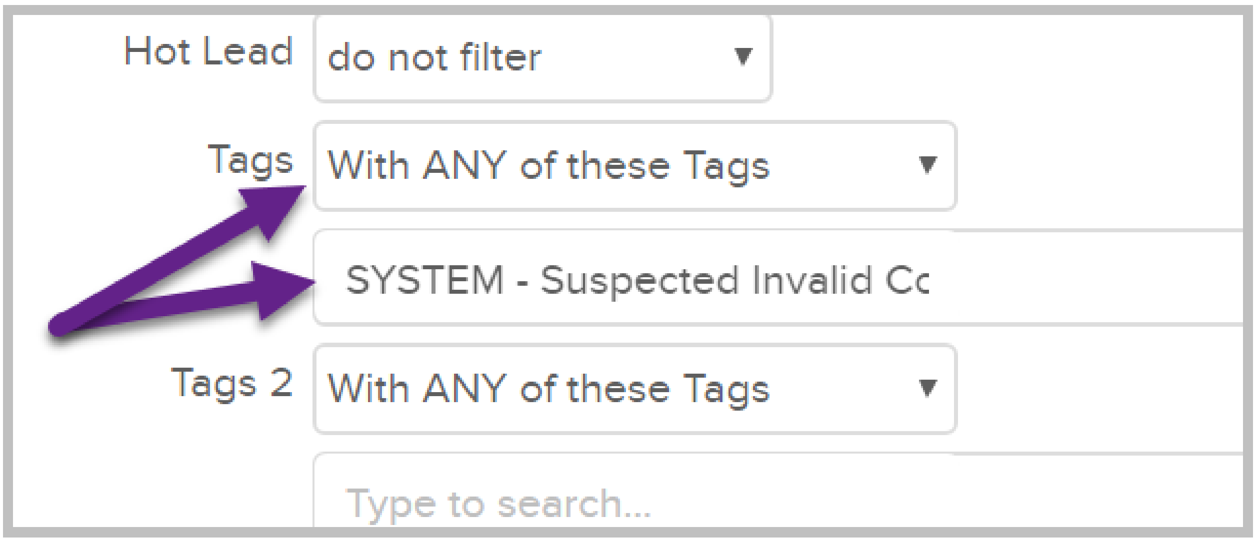

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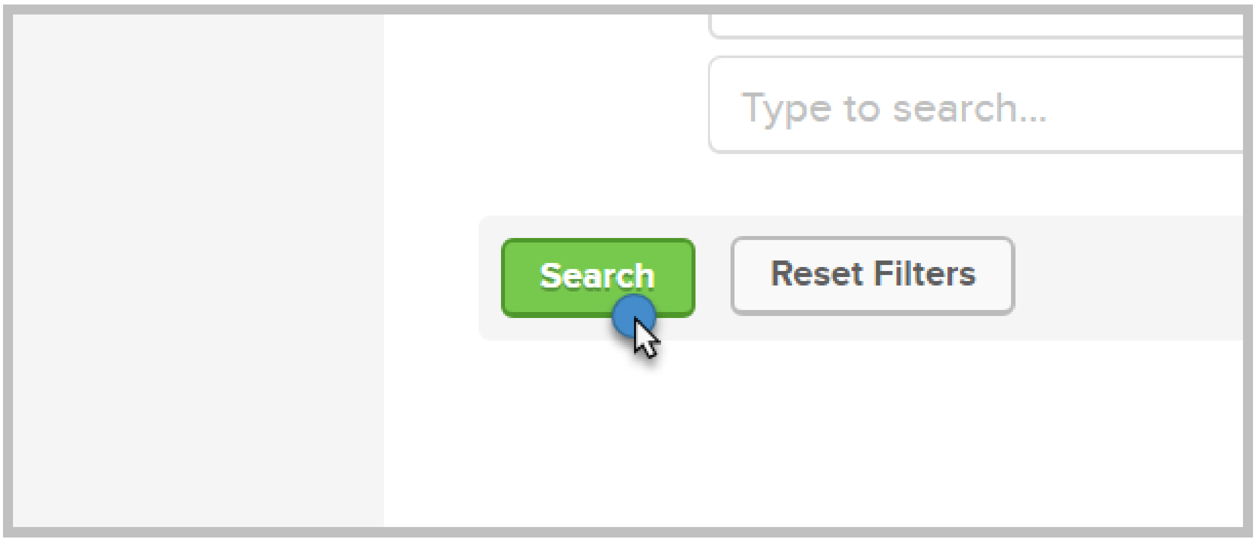
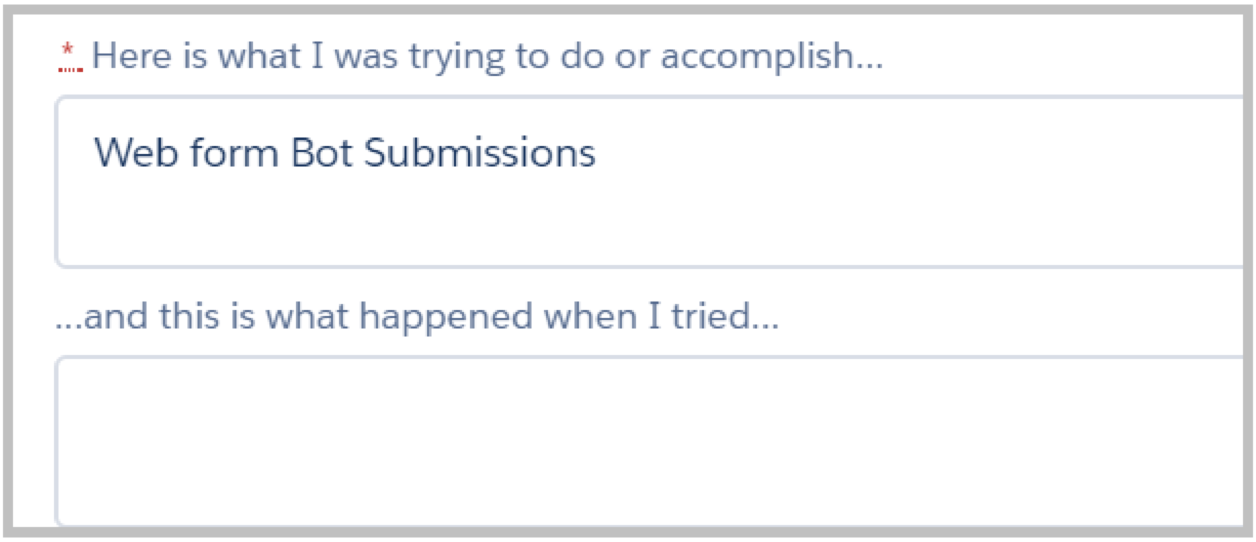


4. Please review and remove tag if wrongly identified

Please verify the suspected bad contacts no later than Monday, May 15, at 9am PDT.

If you have additional questions about this change, please submit an online support case and enter the following in the “trying to accomplish” field, Webform Bot Submissions.



We sincerely apologize if this situation has hurt your ability to connect with your leads and customers. Our Operations and Engineering teams are working hard to resolve this issue for you as quickly as possible, and we implemented security measures to reduce the likelihood of this occurring in the future.

Thank you,
The Infusionsoft Team

Using a different version of Infusionsoft? Click Here to learn more

Infusionsoft reCAPTCHA FAQ

Last Modified on 06/19/2018 3:13 pm MST

Infusionsoft web forms and landing pages utilize Google's Invisible reCAPTCHA . This improves Infusionsoft's spam bot detection on all Infusionsoft web forms and landing pages, to prevent spam emails from entering you system. With a reduction in spam submissions, we can ensure that all applications contain valid contact information, resulting in better email deliverability. Google Invisible reCAPTCHA is built to watch for suspicious behavior on your web form, or landing page, and only prompts verification when suspicious behavior is detected.

What is reCAPTCHA?

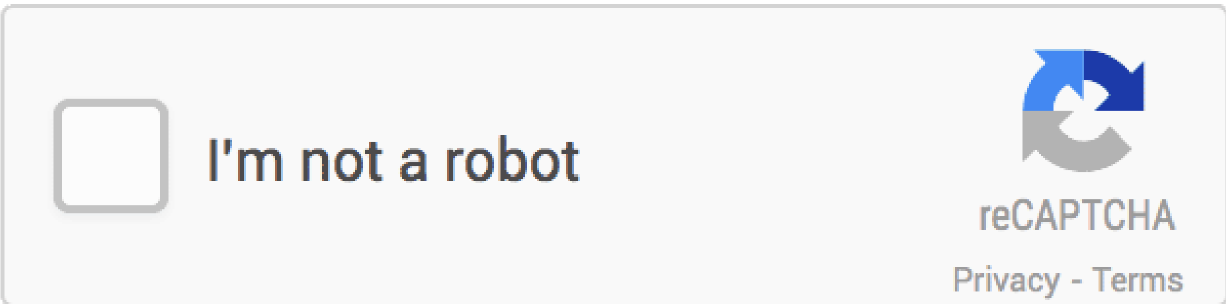
reCAPTCHA is a free service by Google, that protects your website from spam and abuse. reCAPTCHA uses Google Intelligence to keep automated software from engaging in abusive activities on your site. It does this, while letting you valid users pass through, with ease. To learn move, visit https://www.google.com/recaptcha/intro/invisible.html

How does reCAPTCHA help me?

Better email deliverability. When spam email addresses get submitted into your Infusionsoft application, and Infusionsoft emails those addresses, they get identified on email compliance filters, that flag email senders (like Infusionsoft) as "bad senders." Even though the majority of email lists contain legitimate emails, a few spam emails can affect deliverability for all applications. Preventing spam emails from entering the application, and being emailed, will prevent Infusionsoft from being considered a "bad sender", giving confidence to our users, that their emails are being delivered to their subscribers.

What does it look like for my customers?

For most cases, visitors to your web forms and landing pages will never see or interact with reCAPTCHA. If suspicious activity is detected, visitors will be prompted to check the box on the image below. Once the visitor selects the box, the form submission will be completed.



Using a different version of Infusionsoft? Click Here to learn more

May 8 - How to View Known Bad Contacts

Last Modified on 07/12/2018 11:06 am MST

Situation Overview

As you may know, last week we identified that your Infusionsoft app contained contacts that were created by malicious, automated robots (bots) targeting major email service and marketing automation providers. When the bots submitted invalid web forms (a form submitted by someone other than the owner of the email address), it resulted in unsolicited emails being sent to these contacts from your account. This could have a negative impact on email deliverability for all Infusionsoft customers, including you, which is why writing you today.

What steps are we taking to protect email deliverability for you and all Infusionsoft users?

- Monday, May 8: Today, at 9am PDT, we will begin opting out the known bad contacts we have identified in your app, preventing any further communication to these emails.
- We have taken great care to ensure your valid contacts have not been selected. For example, we identified those email addresses that had made purchases, double opted-in, opened emails, or clicked links in emails from your application. None of these email addresses were included in the group designated as “known bad” contacts.

What is a known bad contact?

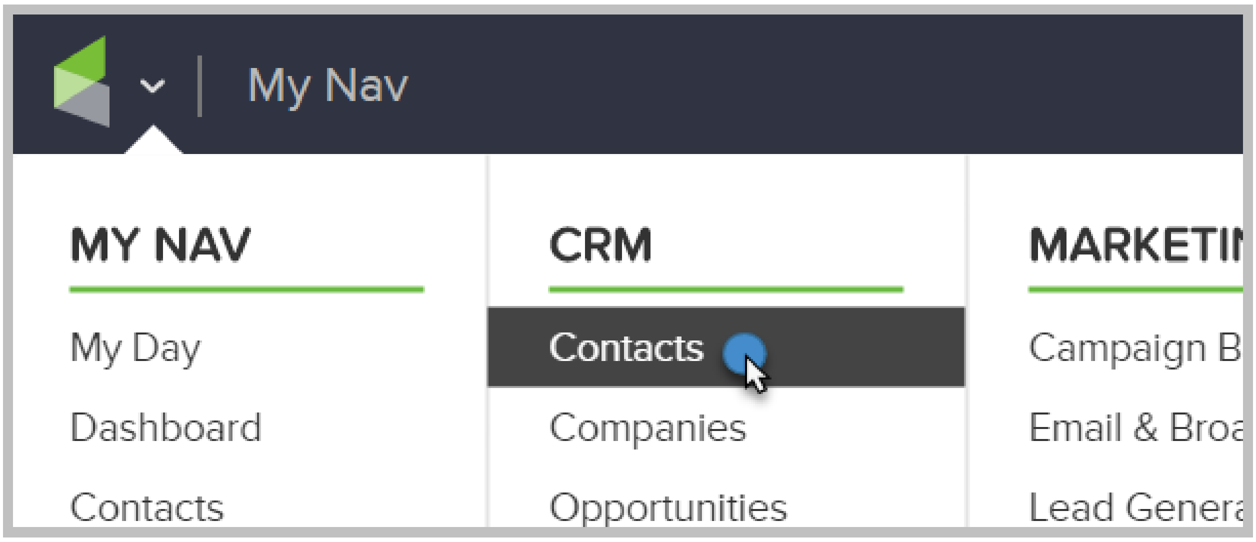
We designate a contact as “known bad” if the first and last names are clearly not valid names.

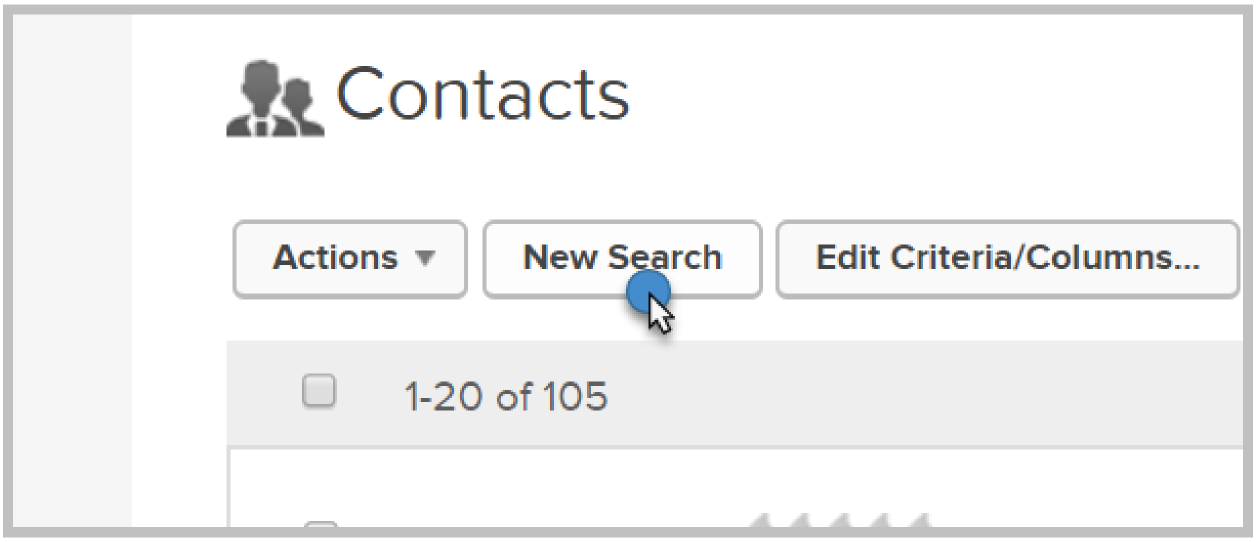
How do I find the known bad contacts you are opting out?

Tuesday, May 9: Beginning at 9am PDT, you can find the known bad contacts we opted out by performing the following steps in your app.

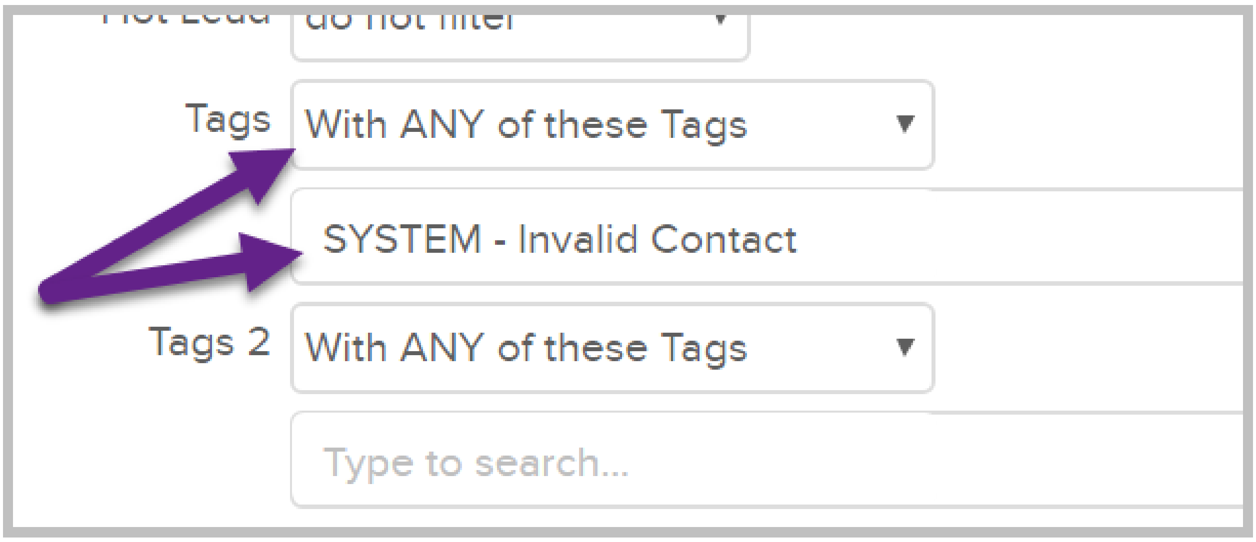
To find SYSTEM - Invalid Contact records, run the following contact search:

1. Navigate to CRM > Contacts. (If previous search results display, press the New Search button)

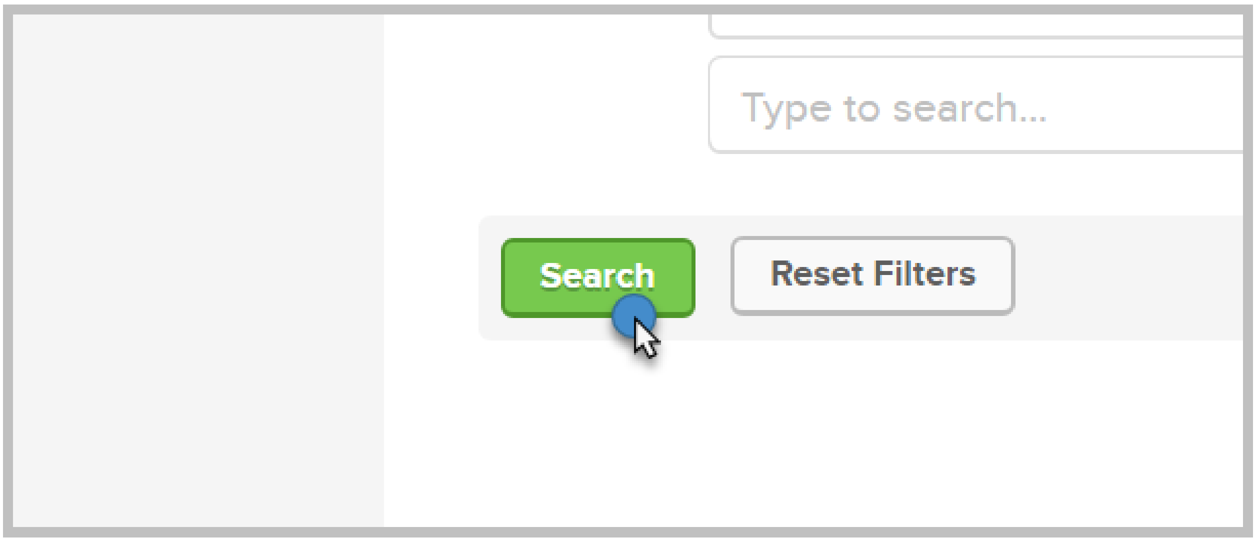




2. Find the Tags criteria section. Choose With ANY of these Tags from the drop down and then search for the tag SYSTEM - Invalid Contact

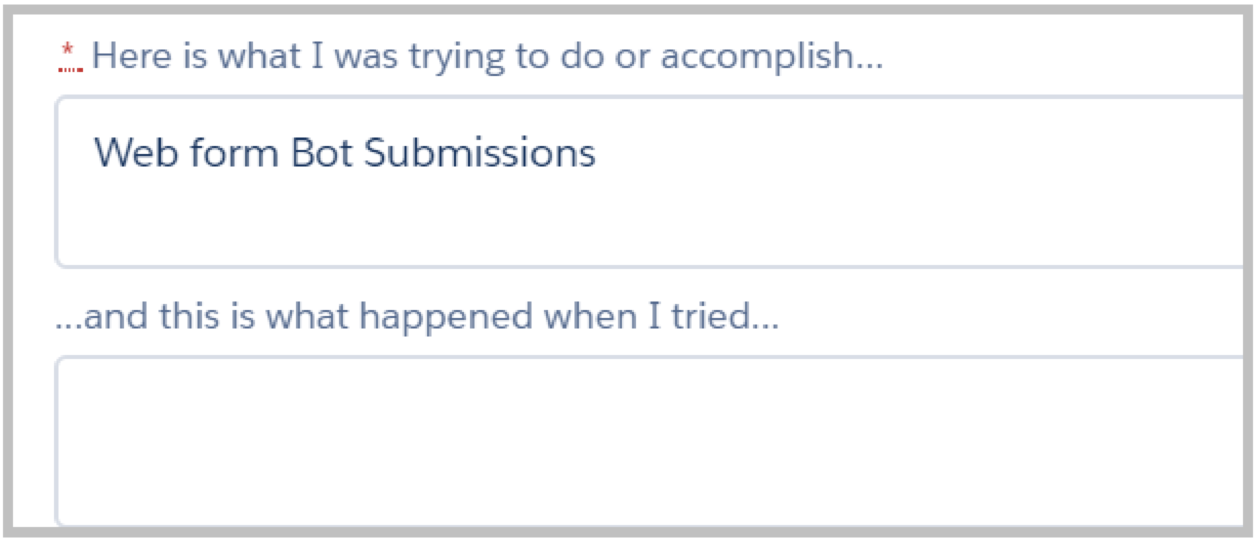


3. Press the green Search button to get results



4. If desired, you can delete these contacts from your database. These contacts should not be re-opted in as any further marketing to them would be unsolicited email

If you have additional questions about this change, please submit an online support case and enter the following in the "trying to accomplish" field, Web form Bot Submission.



We sincerely apologize if this situation has hurt your ability to connect with your leads and customers. Our Operations and Engineering teams are working hard to resolve this issue for you as quickly as possible, and we have implemented security measures to reduce the likelihood of this occurring in the future.

Thank you,
The Infusionsoft Team

Using a different version of Infusionsoft? Click Here to learn more

TLS

Last Modified on 06/18/2018 4:26 pm MST

You've likely arrived at this page after receiving a notification that you are using an out-dated web browser. When making online purchases, it is especially important to have the latest version of your preferred browser installed. We have detected that your browser does not support TLS 1.2 , the latest security protocol that protects your information over a computer network.

Learn how to update your current browser , or click on one of the links below to download a free web browser.

Chrome	Internet Explorer	FireFox	Opera	Safari

Using a different version of Infusionsoft? Click Here to learn more

Facebook Ads by Infusionsoft

Last Modified on 06/18/2018 4:27 pm MST

This document is an FAQ resource for those using our Facebook Ads product. Click here to learn how you can grow your business by generating more leads on Facebook.

Where do the leads generated by my Facebook Ads go?

When new leads are generated on Facebook, their information is sent back into your Infusionsoft application through an integration we've built. Your Infusionsoft application will trigger an API goal that you can use to trigger a campaign. You will also receive new lead notification emails that will give you a download link for retrieving your leads in a CSV file .

What did Infusionsoft set up in my application for me?

When you get started with Facebook Ads by Infusionsoft, we set up two things for you:

1. A value in the Lead Source field on the contact record that says "Facebook Ads by Infusionsoft." That way, it's easy to keep track of which leads came from us!

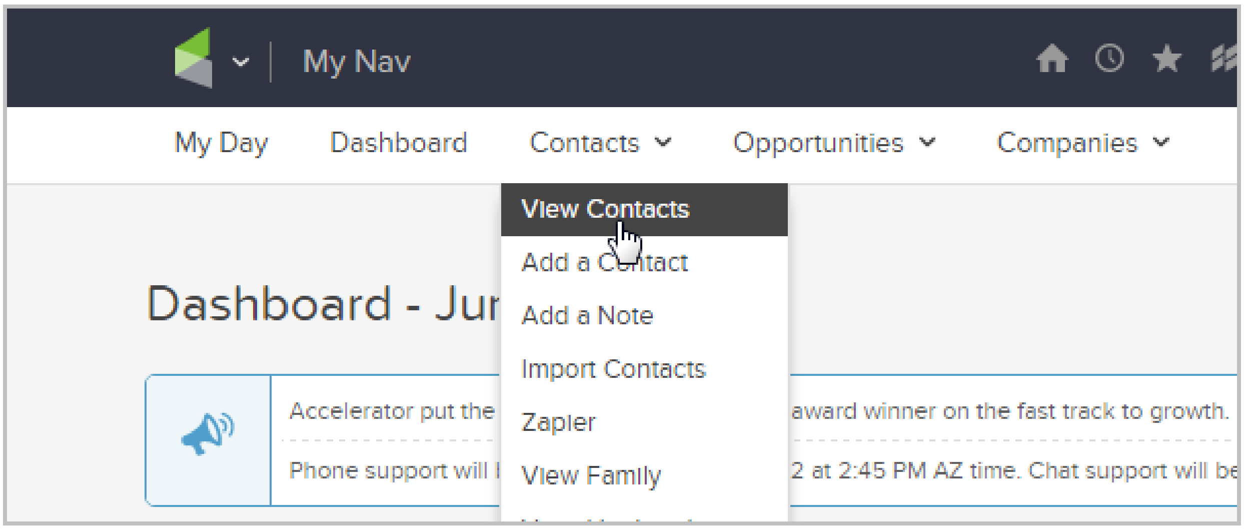
2. A campaign that is triggered by new leads from Facebook. If you had a campaign you wanted to use, we will have set up an API Goal correctly for new Facebook leads to trigger the campaign. If you didn't have a campaign you wanted to use, we'll give you a template campaign based on one of our "Collect & Offer" campaigns in the Infusionsoft Marketplace and we'll label it **FB Leads** in your campaign list. In either case, we will leave a few notes for you in the campaign and publish the portion of the campaign that marks the "Facebook Ads by Infusionsoft" lead source on new leads. Everything else we'll leave for you to configure to your liking.

How do I find the leads in my CRM that came from Facebook

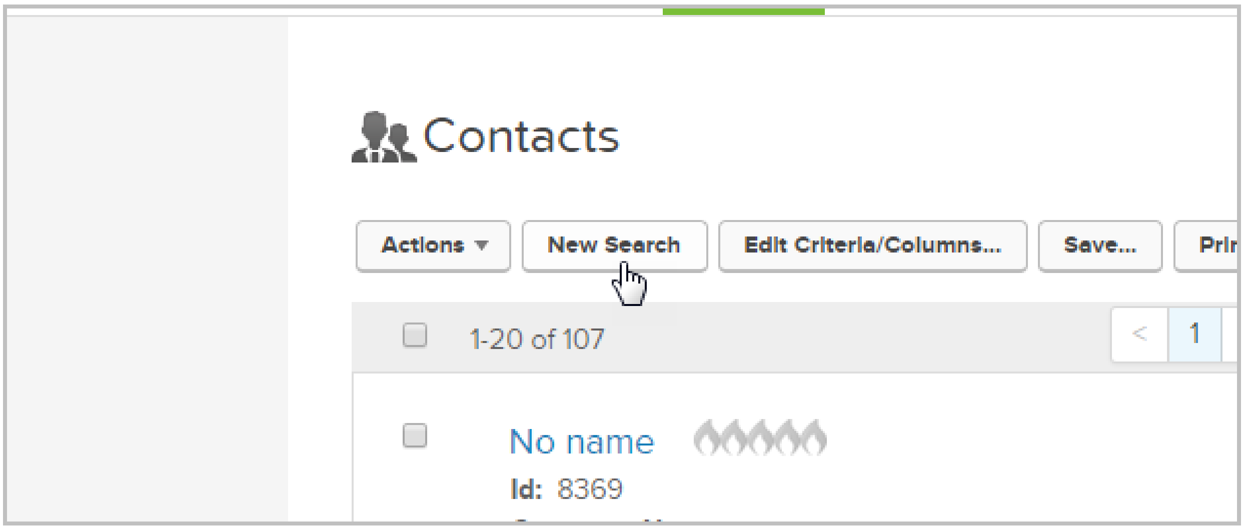
Ads by Infusionsoft?

To find your leads from Facebook Ads by Infusionsoft:

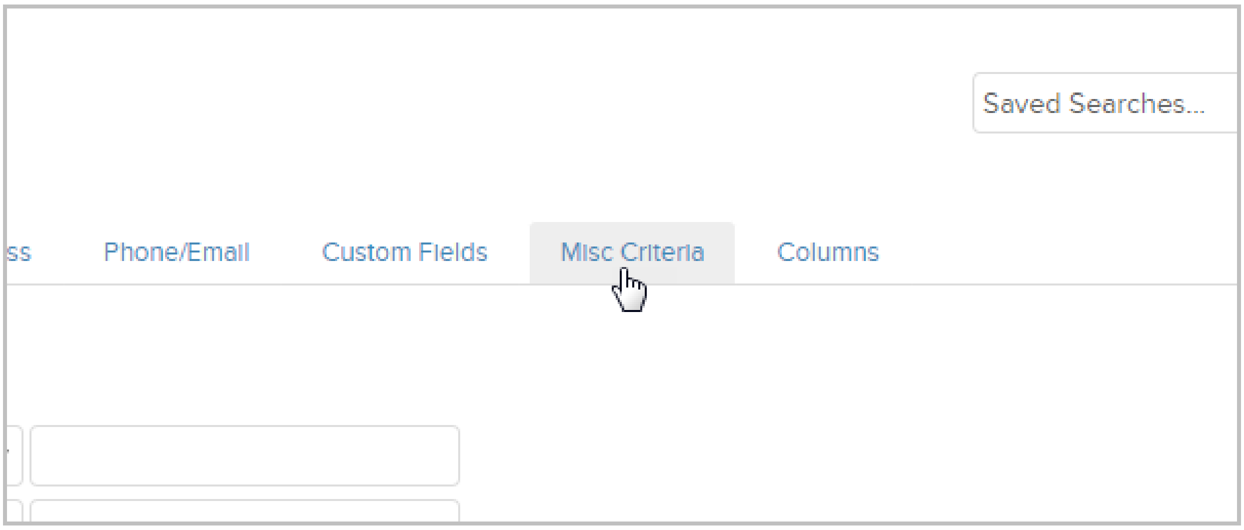
1. Go to **Contacts > View Contacts**



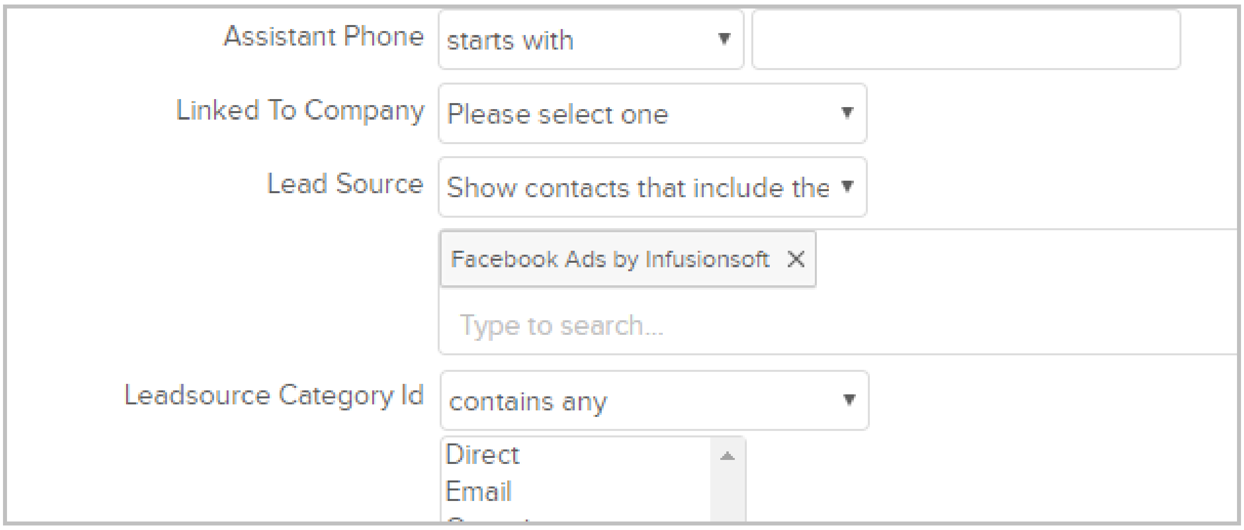
2. Click **New Search** (if available)



3. Select the **Misc Criteria** tab



4. Select the **Facebook Ads by Infusionsoft** lead source



5. Click **Search**

The results that are returned will be all the leads that we've generated through the Facebook ads we're running on your behalf.

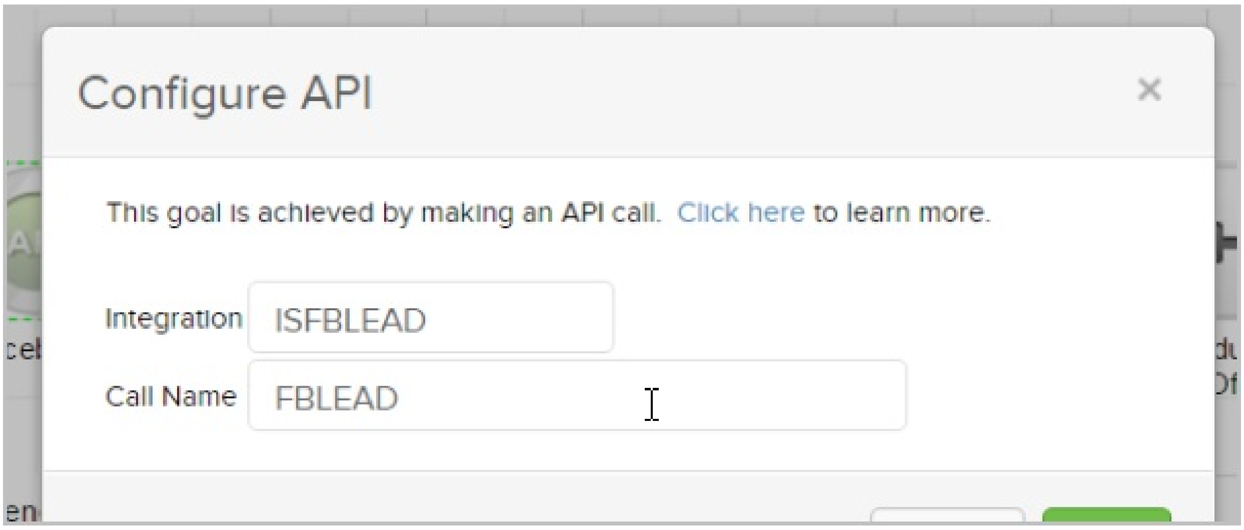
What if I want to start sending my Facebook leads into a different campaign?

To send your Facebook leads into a different campaign, you just have to set up the correct API goal in that campaign.

Be careful! If you have two API goals in two different campaigns, your Facebook leads will go into both campaigns! To avoid that, delete the API goal from the campaign you won't be using and republish it.

To set up the API goal in the new campaign, drag out a new API goal from your toolbox, double-click it, and enter the values shown below. Now, just connect it to the correct sequence and publish your new campaign!

Integration: ISFBLEAD
Call Name: FBLEAD



Using a different version of Infusionsoft? Click Here to learn more

Temporary Service Interruption May 2 2017

Last Modified on 07/12/2018 11:07 am MST

We experienced a temporary service interruption between approximately 1:53am EDT and 3:50 EDT on May 2, 2017.

During this time frame, most customers were able to access their application and experienced the following:

- Unable to schedule/send a broadcast or single email
- Unable to open campaigns
- Link clicks/file downloads were not trackable
- Notification emails were sent to admins advising of “broken campaigns”

Some customers, during this time period, sporadically experienced Gateway Timeout errors.

Below are further details on what this means for broadcasts and campaigns and what course of action you may need to take:

Broadcasts

What if I had a broadcast scheduled to send during the affected time frame?
The broadcast will not have been sent and will need to be re-scheduled. To locate recent broadcasts, please follow the steps in this article

Campaigns

I received X number of emails advising my campaigns were broken. What do I do to address them?
Our system automatically sent the email alerts once the incident occurred. We have fixed all of the campaigns and no additional action/republish is needed to resume campaign

processes.

I had contacts waiting on timers set to run during the outage, or my contacts should have achieved a goal during this time. What happened to them?

If a process failed to run, we retry sending 3 additional times over successive 15 minute periods. If the process failed to send, the action will need to be manually run from within the contact record Campaign history tab. If you suspect that you were significantly impacted, please submit a support case with the title “Service Interruption 5/2”.

Using a different version of Infusionsoft? Click Here to learn more

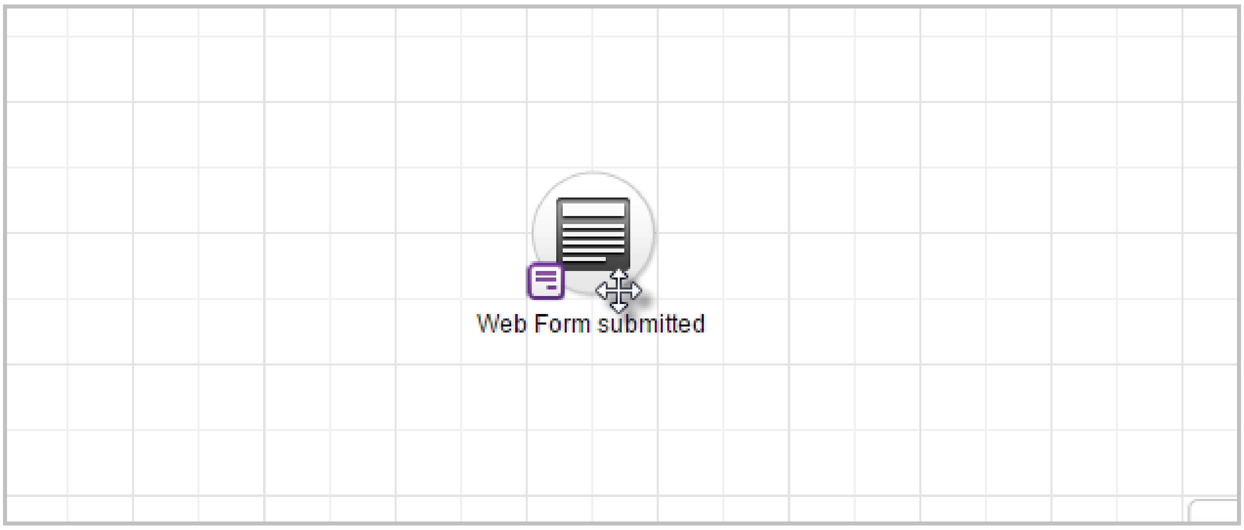
Opt-out Web Forms From Automatic Bot Detection

Last Modified on 06/18/2018 9:21 am MST

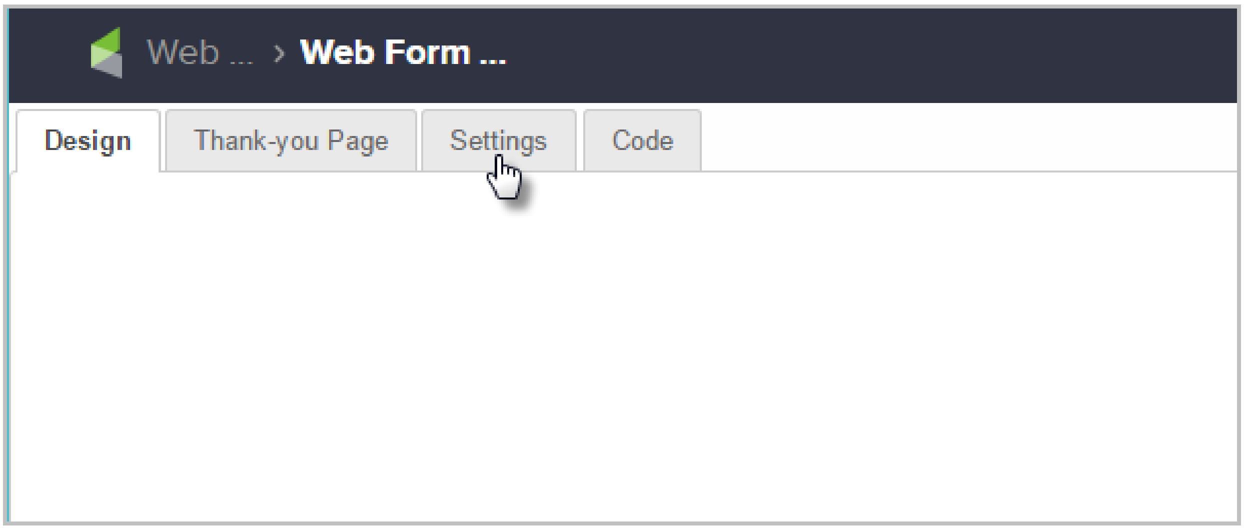
First, click here to learn more about Web Form Bot Security

This article will show you how to turn off Bot Detection on your Infusionsoft web forms.

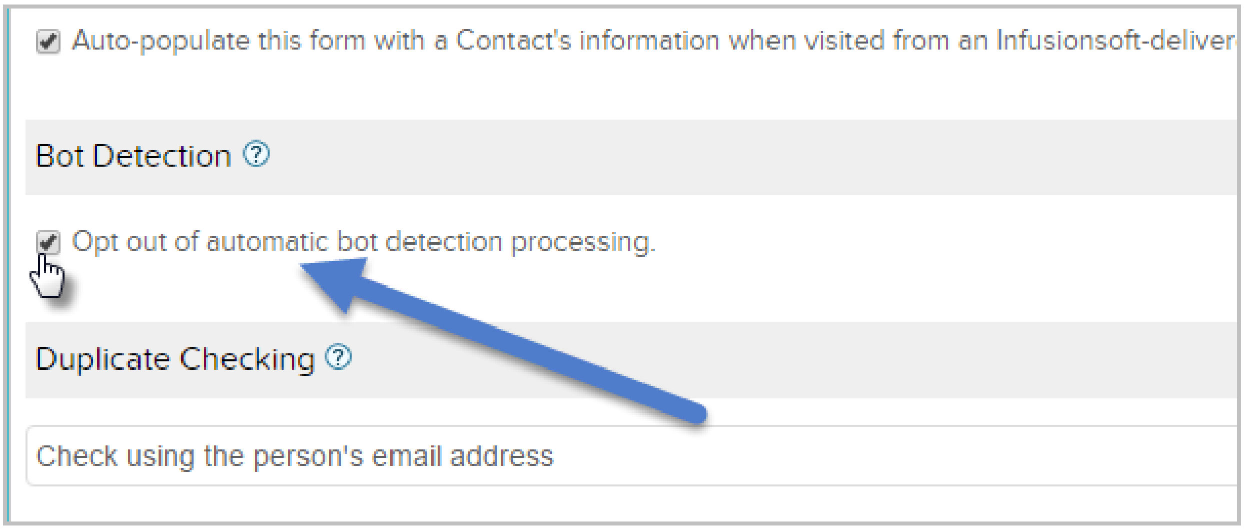
1. Go to the campaign that contains the web form that you want to configure
2. Double-click the web form goal



3. Click on the Settings tab



4. Check the box, "Opt out of automatic bot detection processing"



Important note! In the near future this feature will no longer be optional and will be enabled for all Infusionsoft web forms. For now, the “opt-out” box will allow you to select certain web forms to be exempt from this security enhancement so you have some time to make make any necessary process changes.

Web Form Bot Security FAQ - Captcha

Last Modified on 06/18/2018 4:27 pm MST

What is a bot?

"Bot" is short for "robot" which-in the case of spam-is a program that is written to automatically deliver or retrieve information with malicious intent. Everyone has experienced email spam. A web form bot also delivers spam, but in a slightly different way and for a variety of reasons, such as:

- They're probing for vulnerabilities - often so they can hijack your mail server to relay their spam.
- They're attempting to get links to their spam sites published on your web pages.
- They're out to cause trouble for trouble's sake!

Most small businesses aren't the targets of big nefarious crime syndicates, but their websites and forms get caught up in the wide net cast by these organizations. An automated bot doesn't care if it gets just one in 100K attempts; their cost is negligible. However, the aggravation, wasted time, and software usage costs can make a real impact on you and your business.

What security function is Infusionsoft updating?

This most recent security update addresses an often-used bot tactic - submitting many spam-delivering email addresses via the same web form multiple times from the same location (IP address).

Why the change?

Over the last year Infusionsoft has seen an increase in bots submitting web forms with information that is either known to be bad or that is valid information submitted without the information owner's knowledge. In order to stop bad or stolen information from filling up Infusionsoft users' contact lists, Infusionsoft has enabled this process requiring a CAPTCHA if there is suspicion of bot activity from the same IP address.

What is "CAPTCHA"?

CAPTCHA is an acronym for "**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part" - essentially it's a system to determine if the person submitting any information thru an online form is a bot or human. We want interested humans sharing their information with you and your business. We don't want bots simulating that with bogus information. CAPTCHA is a mechanism to distinguish the two from one another.

Why did Infusionsoft use Google's "reCAPTCHA"?

Choosing services provided by Google enables global ongoing support with the most current technologies, maintained by a trusted company that employes some of the best software engineers on earth. Top notch security with minimal impact to your customer's experience- all maintained outside of Infusionsoft for free. The algorithm for bot detection uses advanced machine learning/artificial intelligence to detect bot behavior. As bots get more advanced, the protection against them should too and Google's detection intelligence provides the highest level of security.

What’s in it for me?

Added security against bot submissions with the new Google CAPTCHA means:

- **Better email deliverability.** When bots sneak bogus email addresses into your Infusionsoft application and your application automates emails to those addresses, those email addresses get identified on email compliance filters that flag email senders (like Infusionsoft) as "bad senders." Even though the majority of email lists contain legitimate emails, the few bogus emails tend to ruin it for the rest of us. Preventing bogus emails from entering and being sent from your application will keep Infusionsoft off the "bad senders" list and maintain healthy deliverability to inboxes that are waiting your marketing message.

- **Accurate list size and information.** You should only have to pay for email list sizes that contain legitimate emails. Some customers find themselves with too many bogus emails which requires larger email list thresholds even though they're not all legitimate. Having a "true" email list with legitimate emails may reduce your need to bump up to the next threshold of email size within Infusionsoft unnecessarily.

How is it being implemented in my Infusionsoft application?

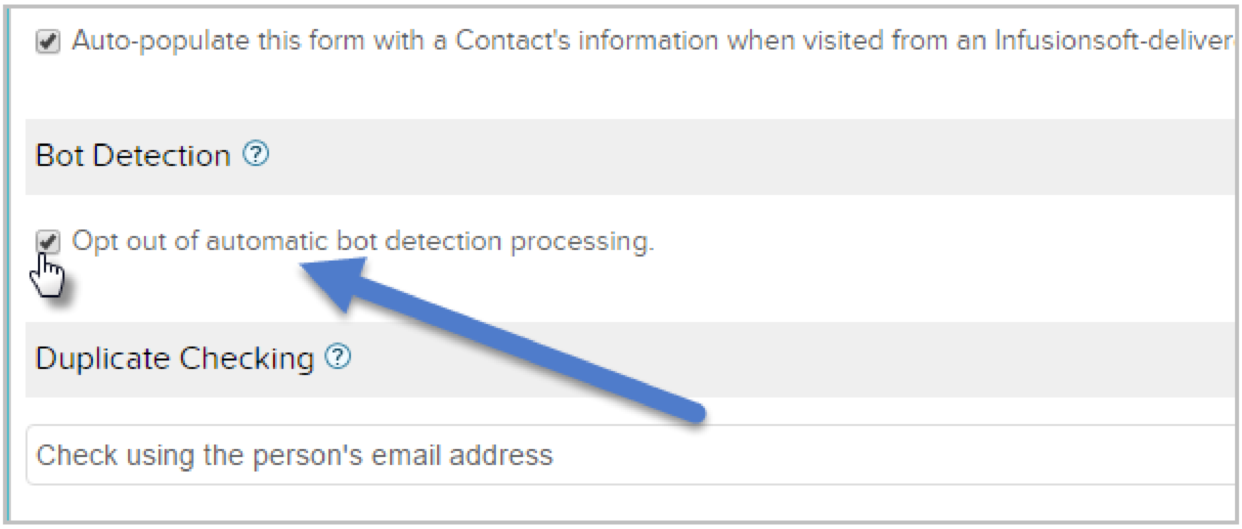
CAPTCHA existed previously on your web forms. The most recent update replaces the old, difficult, time-consuming version that requires users to type in hard-to-see numbers and letters with a simple checkbox. Once the checkbox is clicked, the information from the form being submitted will pass to your contact list inside Infusionsoft. This CAPTCHA checkbox will only appear when Google detects behavior that might indicate possible bot activity on your web form.

Will it apply to every web form?

The changes made will apply to every web form and existing landing page that gathers customer and prospect information-so long as you don't "opt-out" of this security feature in your web form settings.

Do I need to do anything to enable this updated security feature?

No. The Bot Detection (CAPTCHA) feature will default to “on” (unchecked box) in all Infusionsoft applications for web forms, legacy web forms, custom forms, and current landing pages. You may turn off this feature for each form by **checking the “opt-out” box in the “Settings” area** of the web form setup process. See screenshot below:



Please Note: opting-out of this security feature may put your email deliverability at risk. It may also corrupt your email database with bogus email addresses that are set to trigger you as a spammer-affecting the effectiveness of your email marketing.

In the near future this feature will no longer be optional and will be enabled for all Infusionsoft forms without the option to "opt-out." For now, the “opt-out” box will allow users to select certain web forms to be exempted from this security enhancement so that if they need to make process changes there is ample time to do so. **If you are using HTTP post or other advanced automation to submit forms, please consult a developer and begin working towards re-creating this automation thru our API.**

What if I am using the web form’s javascript/HTML code on my website?

Javascript

- The captcha will be displayed within the form frame or on a redirect page depending on the form settings.

HTML

- The captcha will be displayed on a redirect page.

Javascript or HTML

- Bot Detection is enabled by default for all hosted forms.
- Once the captcha is entered successfully the thank-you page will be displayed or the contact will be redirected to the page depending on Thank-you page

Pro-Tip! If there is already a CAPTCHA on the form, it will not prompt the CAPTCHA a second time.

How are web forms hosted with 3rd parties (ex. leadpages) handled?

- Forms hosted through third parties are unaffected by this change.
- If using a 3rd party, we recommend to test your forms by filling out the form from the same computer multiple times in a row to see if the information goes through to Infusionsoft.

Who might need to make changes before enabling this feature?

Advanced or long-time users and partners who currently use HTTP posts to keep contact data updated in multiple systems should begin updating their processes to leverage the improved Infusionsoft API to achieve the outcomes they're seeking.

Example 1:
I use Infusionsoft for marketing automation and another system for e-commerce. I have (or my developer has) set up a process such that when my customer submits a form/order in my e-commerce system, their contact info is **pushed into Infusionsoft by an HTTP post** to automatically fill out a web form in Infusionsoft.

Example 2:
I have multiple Infusionsoft applications and want to distribute contacts from the main app to the other application(s). When certain contacts are added to the main app, they're added to a **campaign that runs an HTTP post** that then pushes that contact info into one of my other Infusionsoft applications by automatically filling out a web form in that application.

In each example (or in related use cases), the system running the HTTP post could submit the destination web form 10+ times in a 12 hour period and it would be posting from the same IP address. However, the HTTP post wouldn't be able to complete the process when, after the tenth form submission, the form would redirect to the new CAPTCHA page.

What should I do in these situations?

Transition the way by which systems are sending information by using the improved Infusionsoft API. The API is created and maintained expressly for connecting other systems and information with Infusionsoft and is fully documented and maintained by our product teams at Infusionsoft with support available. For "How do I" or "How can this be accomplished" questions, we have an API Discussion section in the Infusionsoft Community and an API Facebook group . To ask questions about API throttling, error messages returned from an API call, or to report a bug with the API, you can go here to create a support ticket.

For specific instructions on how to use the Infusionsoft API for a use case similar to the two examples given above, start here .

For general information on using the Infusionsoft API, start here .

Using a different version of Infusionsoft? Click Here to learn more

Time to Update Your Browser (TLS 1.2)

Last Modified on 08/13/2018 11:18 am MST

Odds are at some point you've seen a message in your web browser asking you to upgrade it to improve performance. In fact, effective 23 January 2017 Infusionsoft is upgrading to support the most current TLS security standards .

What does this mean?

If you continue to use an older, outdated browser after 23 January, you may have difficulty accessing your Infusionsoft account. You're probably already having difficulty accessing other sites around the web, too, if you're still using a browser with outdated security measures.

Visit the website of your chosen browser and upgrade today to have uninterrupted - and even improved! - access to your Infusionsoft account. Already pretty sure you have an updated browser? Check this list to make sure it complies with the latest TLS security standards.

What exactly is a browser?

Everyone that accesses web pages on a desktop computer uses a web browser. Without a web browser you can't view websites. How do you get to websites like Facebook and YouTube? You might click on a symbol that looks like one of the below.

What's Wrong With Old Browsers?

Old browsers (especially Internet Explorer versions 6, 7, and 8) are less stable, and much more vulnerable to viruses, spyware, malware, and other security issues. Lacking security is clearly a big problem to be concerned about—especially for those who shop or run a business online. But upgrading also has other benefits, addressed below. Why Are New

Browsers Better? Newer browsers (e.g., Chrome, Firefox, Safari) have a number of advantages over older browsers, including:

- Speed
  - Every new browser generation improves speed
- Better experience
  - Far fewer instances of crashing or freezing, a larger page-viewing area, and access to a wide variety of new features, add-ons and better customizability
  - You can view sites that are using the latest technology to deliver beautiful, informative and entertaining experiences
- Security
  - Newer browsers protect you better against viruses, scams and other threats. Outdated browsers have security holes which are fixed in updates.
  - New browsers will automatically update to the latest version, or will notify you to download an update

Where do I go to update my selected browser?

Visit the website of your selected browser to upgrade by downloading and installing the newest version. Some of the most commonly used browsers' websites are listed below:

- Chrome
- Firefox
- Internet Explorer
- Safari
- Microsoft Edge

Internet browser compatibility guidelines

The following table lists the most common internet browsers. The table lists each browser with the compatibility of TLSv1.2 for recent versions.

Browser	TLS 1.2 Compatibility Notes
Microsoft Edge	Compatible by default

Desktop and mobile versions	Compatible by default
Microsoft Internet Explorer (IE)	Review the Internet Explorer Support for TLSv1.2 article for detailed information and instructions.
Desktop and mobile IE version 11	Compatible by default
Desktop IE versions 9 and 10	Capable when run in Windows 7 or newer, but not by default. Review the Internet Explorer Support for TLSv1.2 article to enable TLS 1.2 encryption. Windows Vista and older operating systems, such as Windows XP, are not compatible with TLS 1.2 encryption.
Desktop IE versions 8 and below	Not compatible or stable with TLS 1.2 encryption.
Mozilla Firefox	Compatible with the most recent, stable version, regardless of operating system
Firefox 27 and higher	Compatible by default
Firefox 23 to 26	Capable, but not by default.
Firefox 22 and below	Not compatible with TLS 1.2 or higher encryption.
Google Chrome	Compatible with the most recent, stable version, regardless of operating system
Google Chrome 38 and higher	Compatible by default
Google Chrome 22 to 37	Capable when run in Windows XP SP3, Vista, or newer (desktop), OS X 10.6 (Snow Leopard) or newer (desktop), or Android 2.3 (Gingerbread) or newer (mobile)
Google Chrome 21 and below	Not compatible with TLS 1.2 encryption.
Google Android OS Browser	
Android 6.0 (Marshmallow) and higher	Compatible by default

Android 5.0 (Lollipop) and higher	Compatible by default
Android 4.4 (KitKat) to 4.4.4	Capable, but not by default.
Android 4.3 (Jelly Bean) and below	Not compatible with TLS 1.2 encryption.
Apple Safari	
Desktop Safari versions 7 and higher for OS X 10.9 (Mavericks) and higher	Compatible by default
Desktop Safari versions 6 and below for OS X 10.8 (Mountain Lion) and below	Not compatible with TLS 1.2 encryption.
Mobile Safari versions 5 and higher for iOS 5 and higher	Compatible by default
Mobile Safari for iOS 4 and below	Not compatible with TLS 1.2 encryption.

Using a different version of Infusionsoft? Click Here to learn more

Unengaged Marketable

Last Modified on 06/18/2018 9:21 am MST

New! Easily identify the riskiest addresses on your lists with automatically updated Unengaged Marketable email status.

If you've been email marketing for long you've been warned about the dangers of emailing a cold list. But sending cold emails is perfectly legal - so why do we care? Because deliverability.

You send emails to cold lists because you want to connect with people. In reality, those same cold emails are killing your deliverability and more and more of your emails are destined for the spam folder.

But exactly how does this impact your deliverability? There are few primary ways:

- Your IP address, ISP or domain name is on a blacklist (e.g., Spamhaus, Spamcop).
    - Blacklisting is based solely on where you're sending from - not email content.
- You're hitting a spam filter.
    - Usually based on email content. If you're using common spammy subject lines or content that's in a lot of spam emails, your email could hit the filter.
- You're getting custom blocked.
    - Any blocker could custom-code to block emails like yours based on any criteria they want (content, subject, ISP, etc.). If you're lucky, your email is simply delivered to a spam folder. Worst case, your email bounces (keep reading).
- Your emails are getting bounced.
    - Only the hard bounces affect deliverability because the address you're sending to either doesn't exist or is blocked because you need to configure the SPF on your DNS account.
    - These are the bounces that you're most in danger of getting when emailing a cold list. If someone hasn't engaged with your content in a while, it could certainly be because they deleted that email account. This puts you in danger of hitting a spam trap .

At Infusionsoft, a full team of email operations geniuses manages our domains and related items alongside our systems teams to ensure we maintain the 99.5+% deliverability to the inbox for our users. However, it's also our job to protect our users from each other - and even from themselves! When our users' emails aren't getting to the inbox it's often because of an issue with their own IP address, content or technical configurations. Even if it's accidental, if Infusionsoft allows users with poor email practices to continue to email via our servers, we put our community and our email reputation at risk.

Infusionsoft protects users through a variety of technical means. For example, all broadcasts to cold lists are throttled , testing the sender and the message with a small slice of the list first. Not a lot of spam complaints? The rest of the list gets the message. Too many? The send is not competed. This protects both Infusionsoft and the sending IP address from being hit with complaints, avoiding blacklist risk.

Infusionsoft also coaches and educates businesses on email marketing best practices like gaining permission to market, personalizing content and segmenting lists. Another frequent recommendation is to regularly perform list hygiene. Any email marketer knows how important it is to not keep emailing unengaged contacts; for all we know, they could be not engaging because they mistyped their email, they're no longer at that company or they're just not interested any more. What's trickier is figuring out exactly who's engaged and who's not engaged because it changes over time.

That's why Infusionsoft's product team developed enhanced email statuses and search functionality that updates email engagement status in real time. Now, when a contact hasn't engaged* within the past four months their email status will automatically update to the new Unengaged Marketable status:

- Performing your normal list hygiene is easier than ever. Use the Email Status Search to quickly find contacts who are currently in Unengaged Marketable status.
- Not ready to remove or opt-out those contacts just yet? No worries. They'll still get your messages for now - just remember the risks of emailing unengaged contacts!
- When one of those contacts engages again, their email status will automatically return to whatever it was before.
- Extra credit: Use the new filters in the Email Status Search to find contacts who are just starting to cool off or who have engaged within a specific time frame. Easily search by contacts' Last Engagement date and then get creative! A postcard with special offer for those who haven't engaged in over a month? A flash sale email to those who've engaged in the past two days? Next-level tactics are right around the corner when you've got exactly the list you need.

Infusionsoft is committed to innovate and constantly improve. Not just improving our code but also the resources and marketing best practices that small businesses need to get the results that are most meaningful for their unique businesses. We're pretty excited about this most recent update and the other features that came along with it. BUT we've got more up our sleeve so keep an eye out for our next monthly product update.

Make sure you don't miss the latest Infusionsoft product improvements. Update your email preferences here and select News and Product Updates to stay in the know.

*Engagement is defined as one or more of the following actions: opening an email, clicking a link in an email or submitting a landing page or web form.

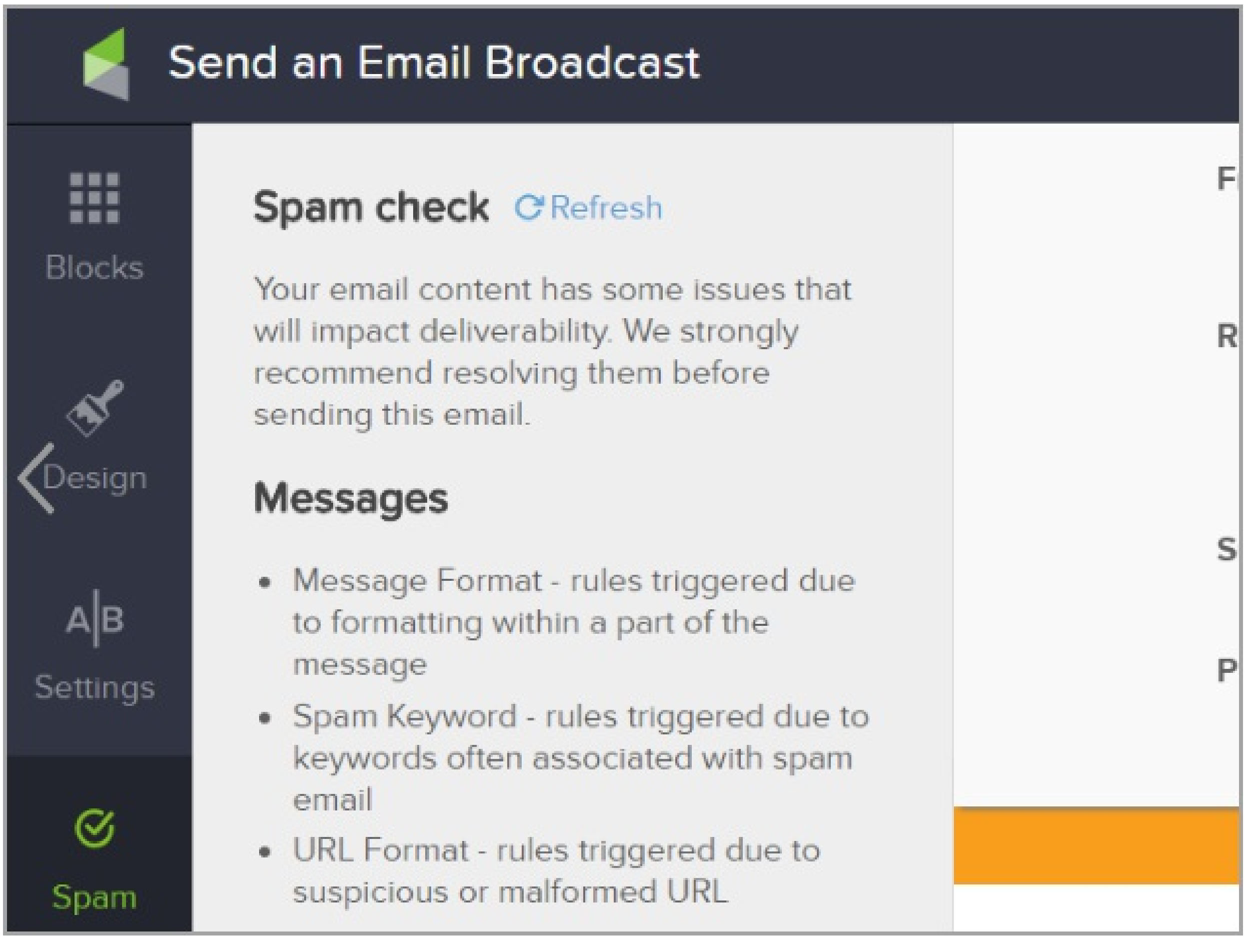
Using a different version of Infusionsoft? Click Here to learn more

July Update 2018 | Classic Infusionsoft

Last Modified on 07/26/2018 3:48 pm MST

Content Risk Services

Over the next several weeks, we will release built-in functionality to help you avoid triggering spam filters when sending an email broadcast. Certain keywords can trigger these filters, which send your email straight to your contact's junk folder, where it sits unread. Now you can check your emails for these keywords by clicking the "Spam" icon in the email builder. These keywords will also be flagged when you click "Review and send" before sending your email. Click here to see how!



API Additions and Changes

- 07-13-2018

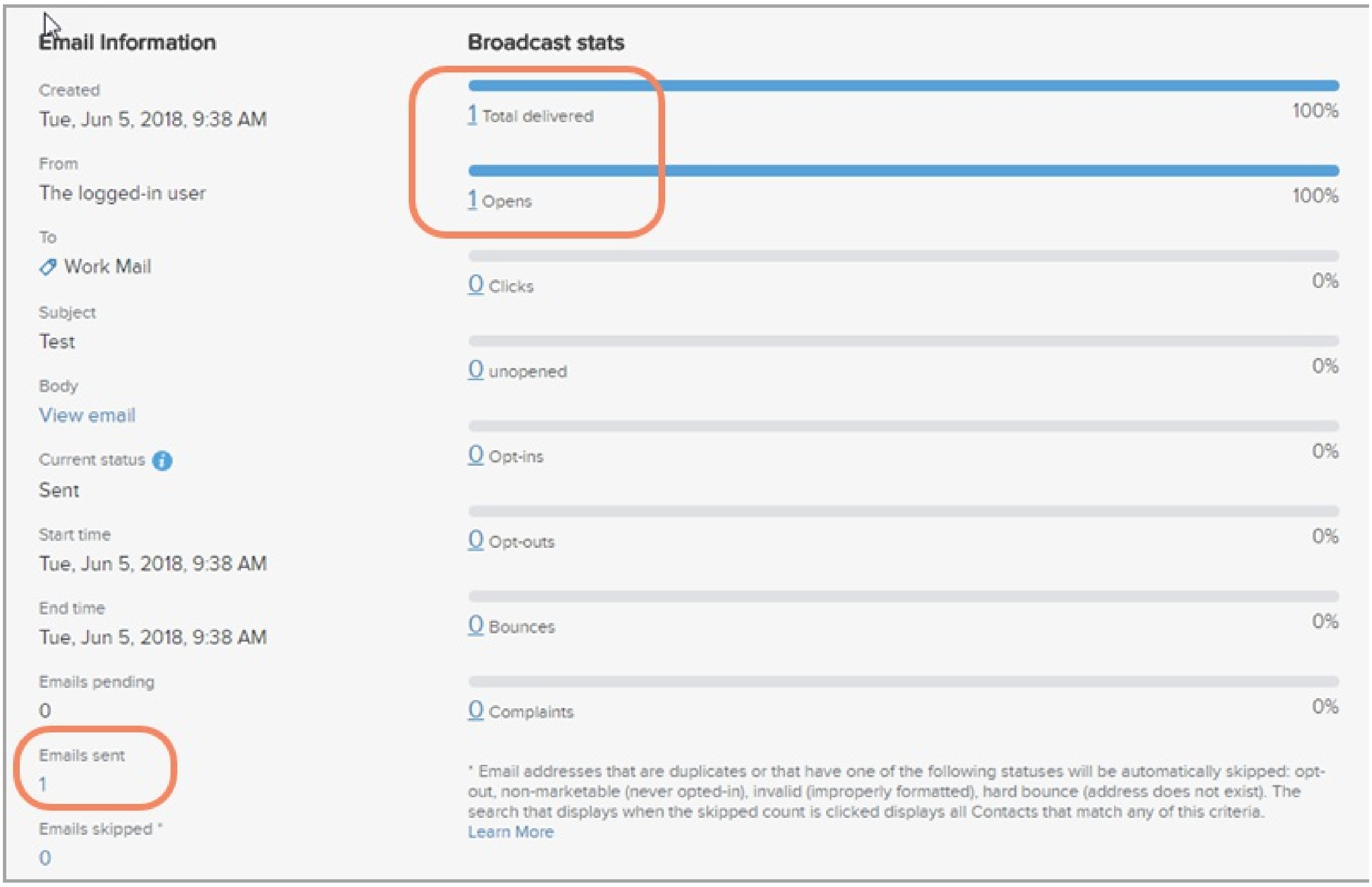
Using a different version of Infusionsoft? Click Here to learn more

June Update 2018 | Classic Infusionsoft

Last Modified on 07/25/2018 1:48 pm MST

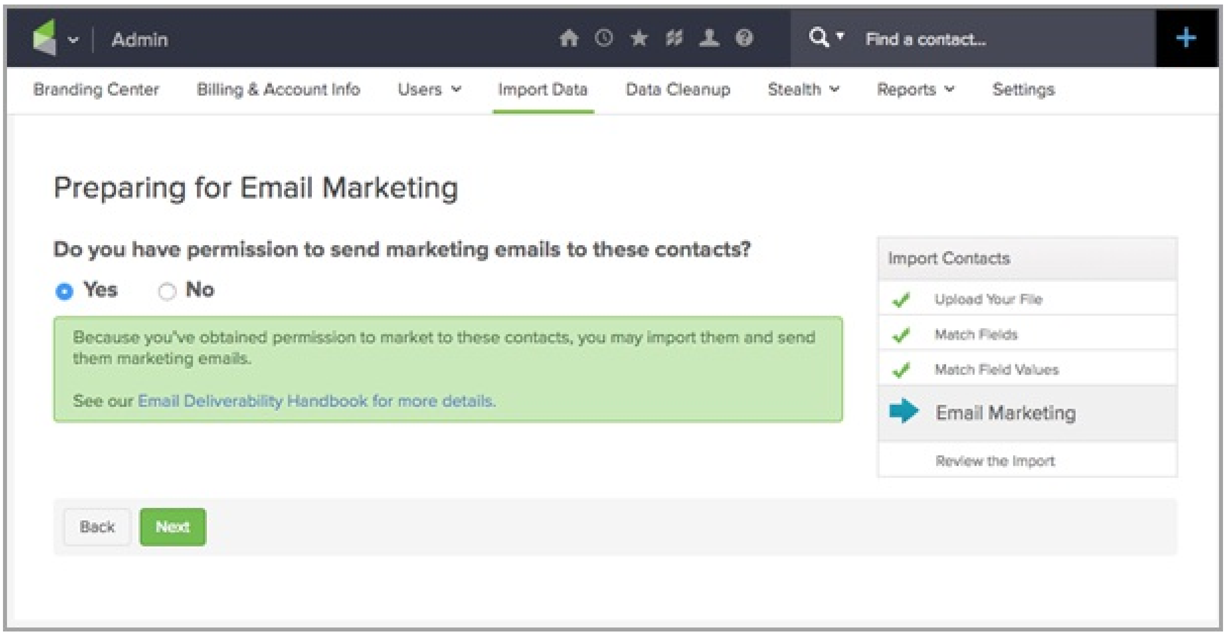
Open Rate Calculation Improvement

Infusionsoft's email open rate calculation has been improved for accuracy. Previously, emails that were sent but not successfully delivered were included in the calculation, potentially resulting in a lower open rate. The open rate now reflects the count of unique recipients who opened the email divided by the count of unique email addresses to which the email was delivered.



Reduced Effort During Contact Import

We reduced the number of questions regarding your permission to send emails to one simple question. The Import Contacts guide has been updated.



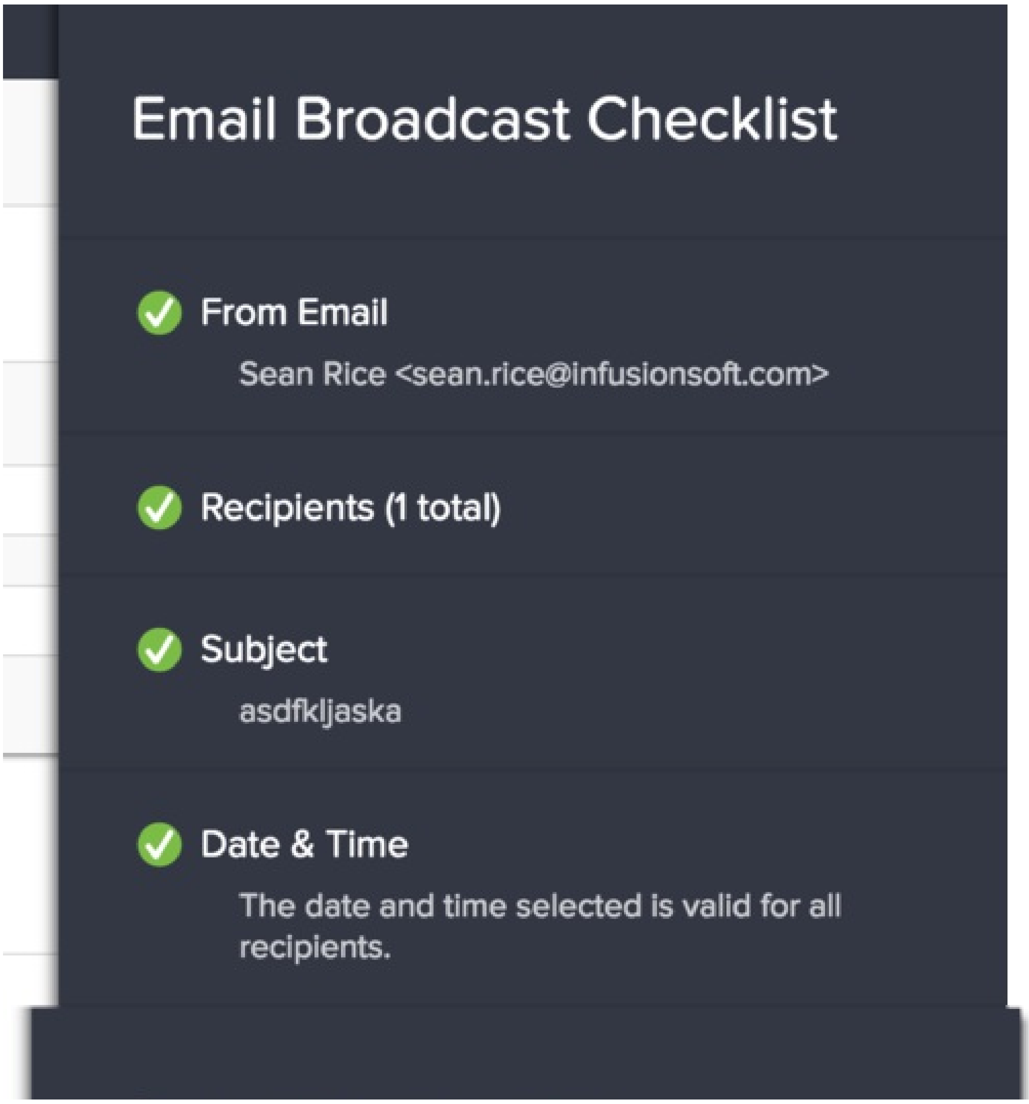
Using a different version of Infusionsoft? Click Here to learn more

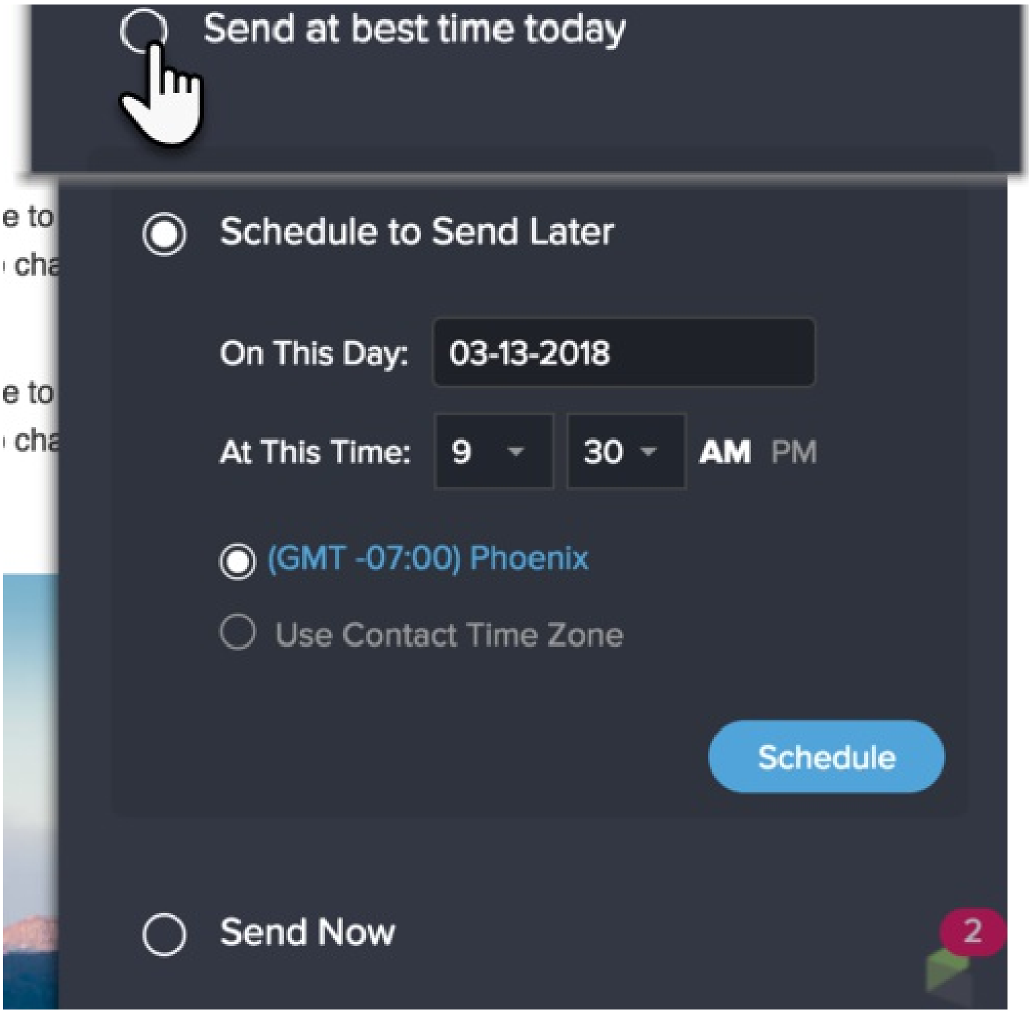
May Update 2018 | Classic Infusionsoft

Last Modified on 07/25/2018 4:24 pm MST

Email Broadcast - Best Send Time

Infusionsoft can now calculate the best time to send an email to a given group of recipients. Infusionsoft will attempt to calculate the ideal send time for your selected audience when a confidence of at least 75% is met. If the confidence level is lower that 75%, we will send the broadcast based on the best send time for the average customer. Click here to watch the video and read the step-by-step article.





Anonymize a Contact

There are some new featues (coming May 22) that will help you comply with GDPR regulations:

- How to Enable GDPR Settings
- How a Contact May Exercise Their Right of Erasure
- How to Anonymize (Redact) a Contact Record
- How Anonymous Records Work

Also, be sure to check out the GDPR Readiness Guide !

API Additions & Changes

- 5-15-2018
- 07-13-2018

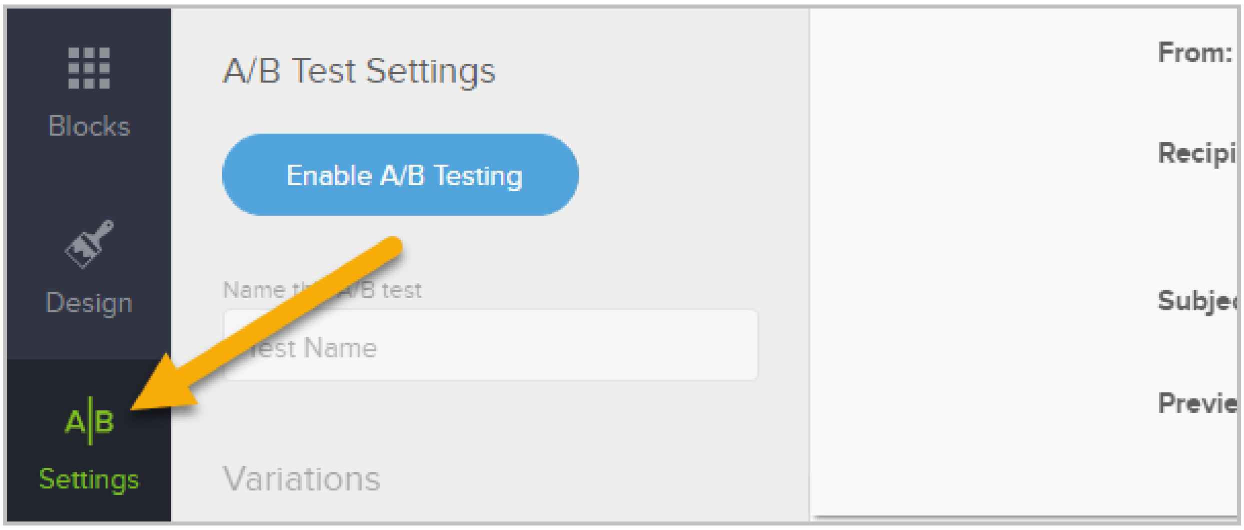
Using a different version of Infusionsoft? Click Here to learn more

April Update 2018 | Classic Infusionsoft

Last Modified on 06/21/2018 1:47 pm MST

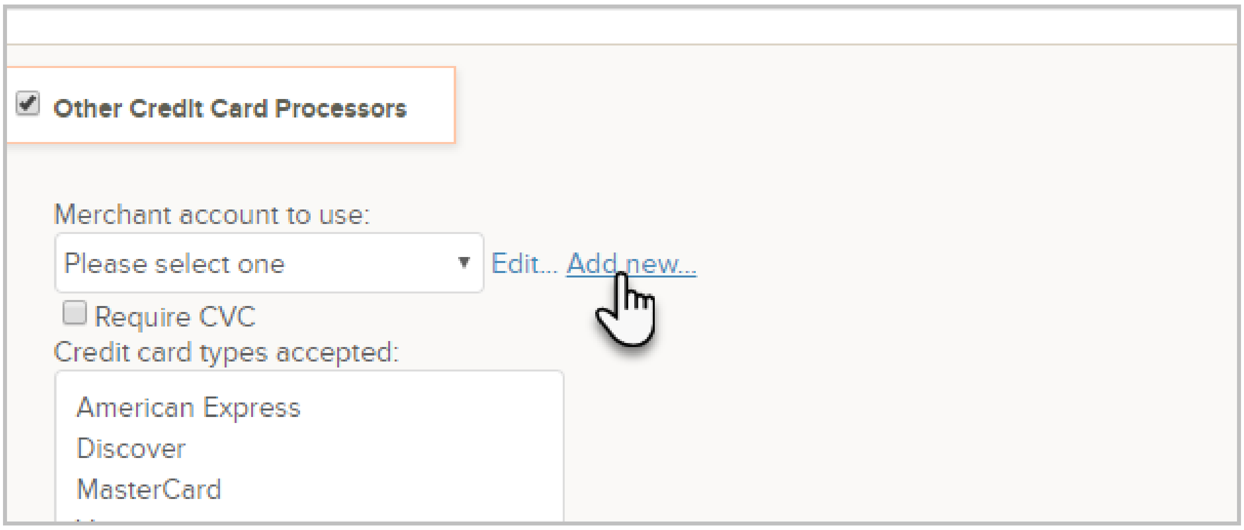
A/B Test Email Broadcasts

You can now A/B test up to 5 email variants when sending an Email Broadcast! Click here to watch the video and read the step-by-step article.



FlexPay Gateway Integration

Infusionsoft now supports the FlexPay gateway. FlexPay uses advanced AI to help reduce credit card decline rates. Check out their website to learn more and check out the article to learn how to set it up in Infusionsoft .



API Additions and Changes

- 4-9-2018
- 4-11-2018
- 4-18-2018

Using a different version of Infusionsoft? Click Here to learn more

March Update 2018 | Classic Infusionsoft

Last Modified on 06/21/2018 1:25 pm MST

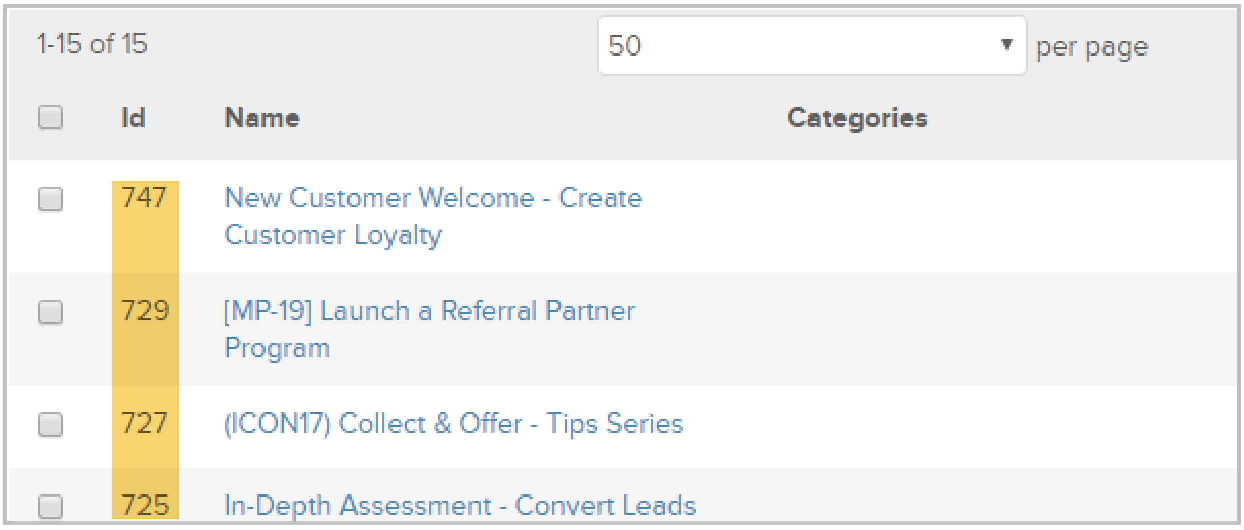
Hebrew Translation for External Pages

Several external pages will be automatically translated to Hebrew based on your user's browser setting. Click here to view a full list of supported languages and external pages.

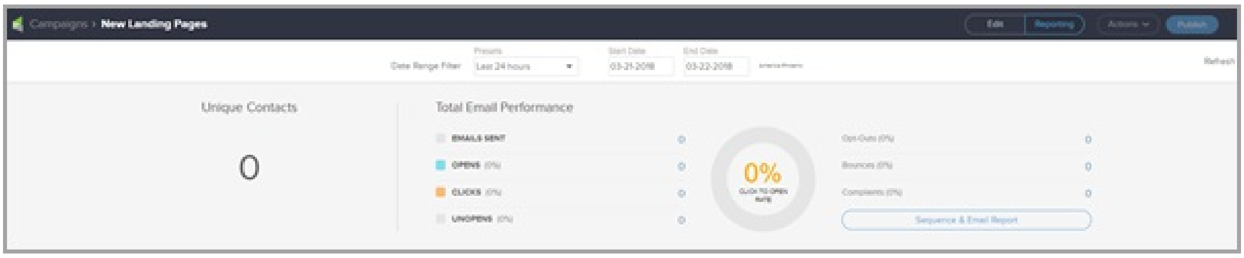
Campaign Ribbon Reports Now Available in Marketing Reports

You can now find the helpful campaign-specific reports under the Marketing Reports section (Marketing > Reports).

Please note: You will need to know the Campaign ID number that can be found on the Campaigns List page (Marketing > Campaign Builder).


1-15 of 15 | 50 per page

	Id	Name	Categories
	747	New Customer Welcome - Create Customer Loyalty	
	729	[MP-19] Launch a Referral Partner Program	
	727	(ICON17) Collect & Offer - Tips Series	
	725	In-Depth Assessment - Convert Leads	



Unique Campaign Contacts	This shows unique Contacts who are in a specific Campaign
Campaign Contacts	This shows Contacts who are being marketed to by Campaign Sequences.
Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.
Campaign Goal Completion	This shows Contacts who have completed Campaign Goals
Campaign Email Sent Report	Contacts that have been sent email from a given campaign.
Campaign Email Open Report	Contacts that have opened a campaign email.
Campaign Email Click Report	Contacts that have clicked links within a campaign email.
Campaign Email Opt-Out Report	Contacts that have clicked an opt-out link within a campaign email.
Campaign Email Bounce Report	Campaign contacts with bad email addresses.
Campaign Email Complaint Report	Contacts that have reported a campaign email as spam.
Campaign Email Unopened Report	Contacts that have not opened a campaign email.

API Additions and Changes

3-6-2018

Using a different version of Infusionsoft? Click Here to learn more

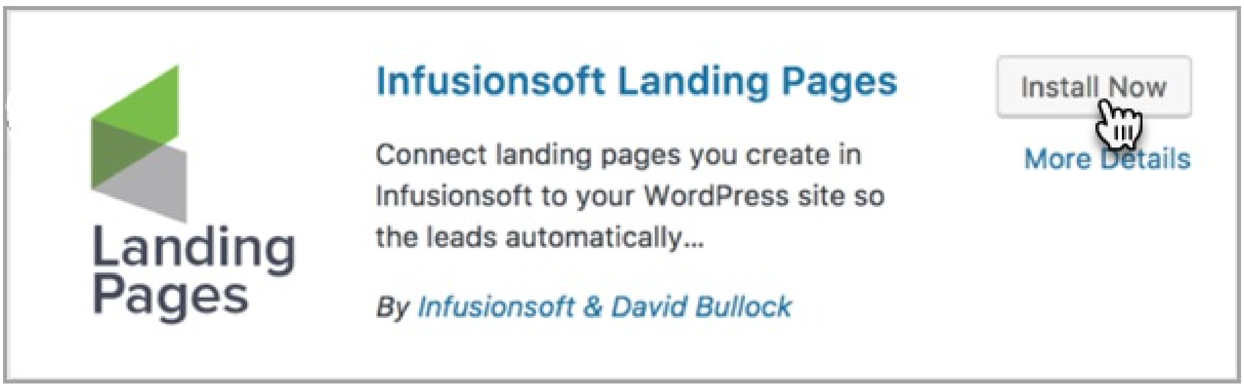
February Update 2018 | Classic Infusionsoft

Last Modified on 06/21/2018 2:03 pm MST

New Landing Pages WordPress Plugin

You can now display your Infusionsoft Landing Page in your WordPress website! You can assign any domain name you own to the landing page which will give it the appearance that it exists on your website.

Click here to see how!



Phasing-Out Some Merchant Accounts

We are streamlining our merchant account offerings. The following merchant accounts will no longer be available in Infusionsoft after February 20th, 2018. If you are already using one of these merchant accounts in your Infusionsoft application, you will not be affected; however, you will not be able to make a new connection to these merchant accounts after February 20th.

- Beanstream
- Sage Pay
- Easy Pay
- Worldpay
- USA ePay
- Moneris
- DPS
- Internet Secure

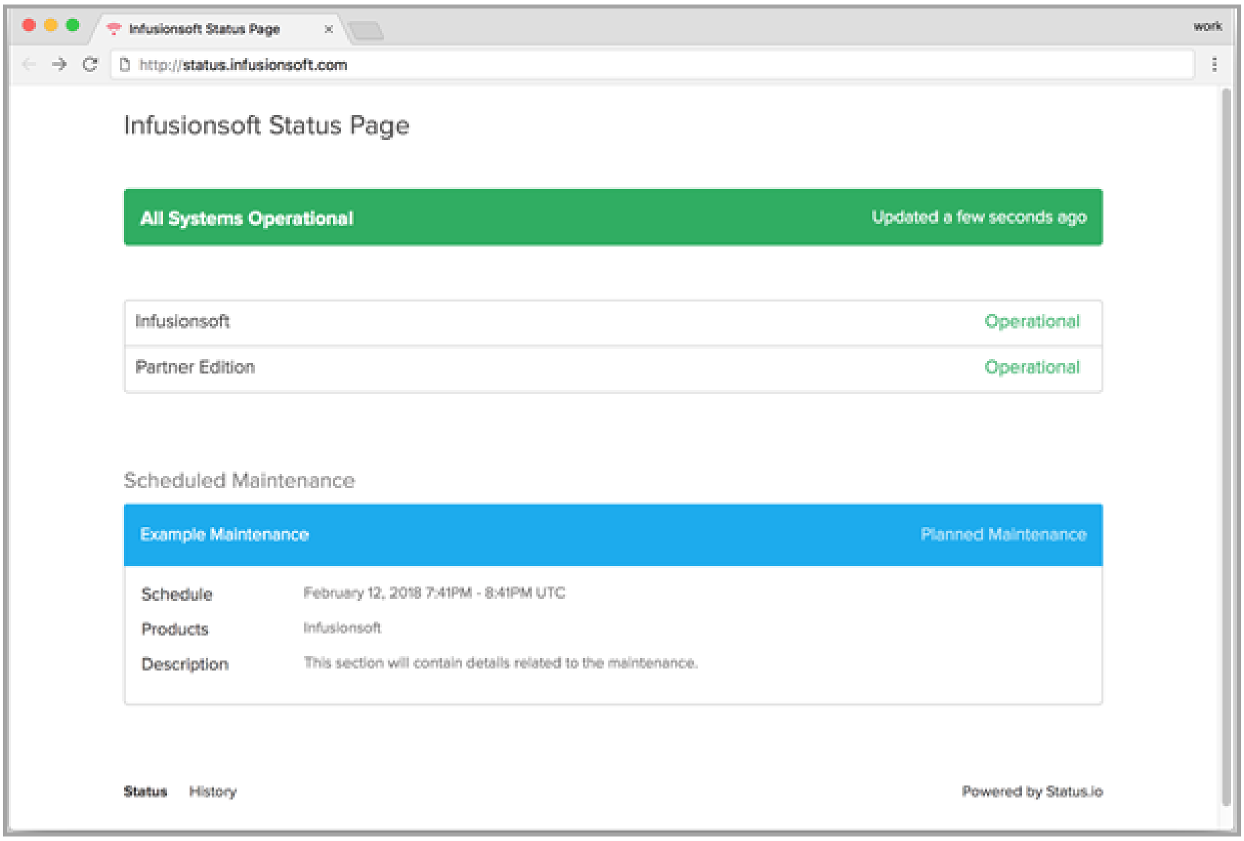
Campaign Builder Now Supports the Safari Web Browser

The Campaign Builder fully supports Safari on Mac OS.

[Protip:Pro-Tip::Note that Safari is still not a fully supported browser for all areas of the app, so you may still find some quirkiness in other areas.]

New Infusionsoft Status Page

We now have a live production status page that will show you the current status of Infusionsoft and Partner Edition servers. It will also show scheduled maintenance announcements. Click here to learn more about the status page.



Recently Resolved Defects

Click here to view recently resolved defects

API Additions and Changes

- 2-01-2018
- 2-13-2018
- 2-27-2018

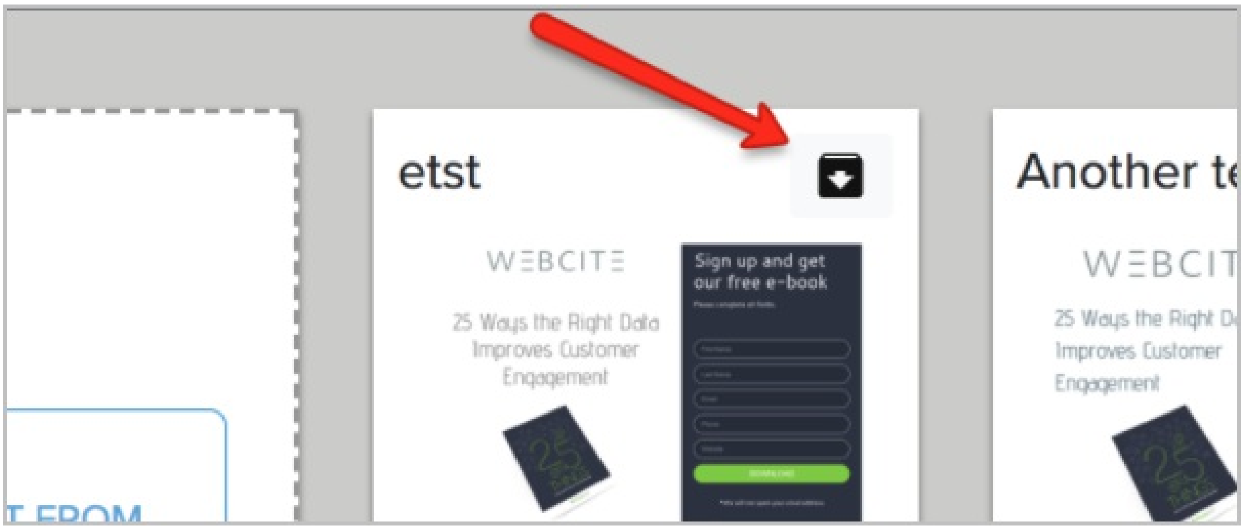
Using a different version of Infusionsoft? Click Here to learn more

January Update 2018 | Classic Infusionsoft

Last Modified on 06/21/2018 1:21 pm MST

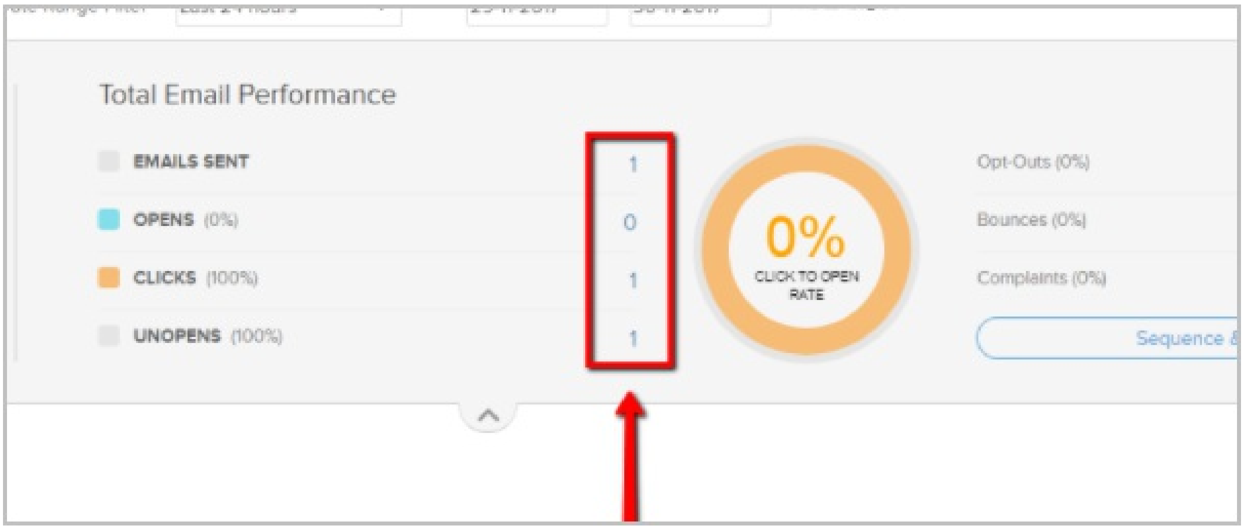
Archive Templates in New Landing Pages

You can now archive templates that you don't use often. Archiving a template removes it from the templates area so it isn't so cluttered. Click here to learn how!



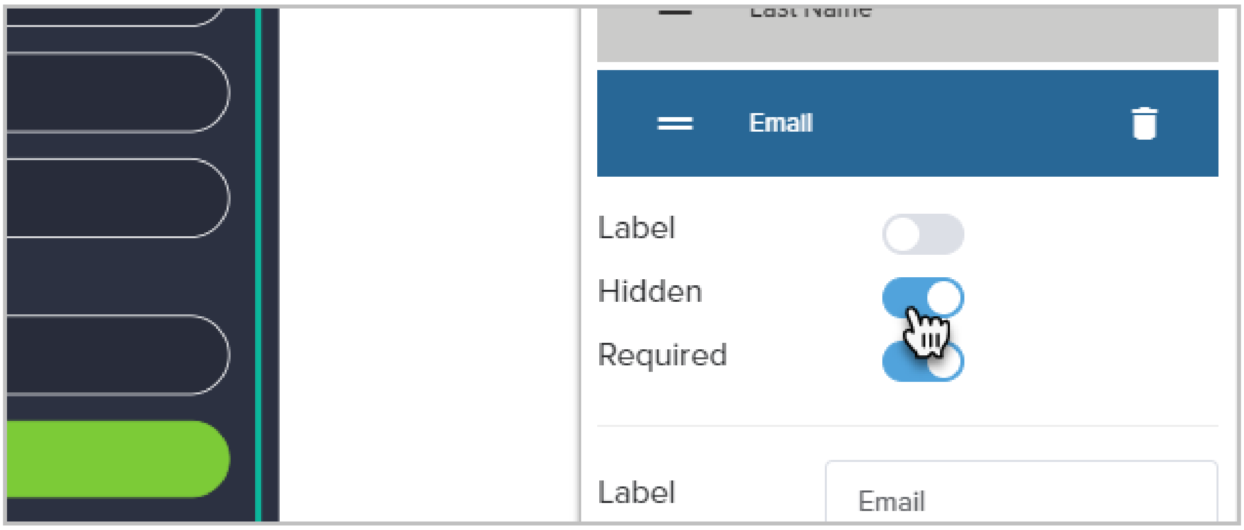
Campaign Email Performance Reporting will now contain clickable links to results

After switching your campaign to reporting view, you'll note that results are now hyperlinked. Click the link to view the report. This is available for the Campaign Email Performance Report and Campaign Full Sequence and Email Report



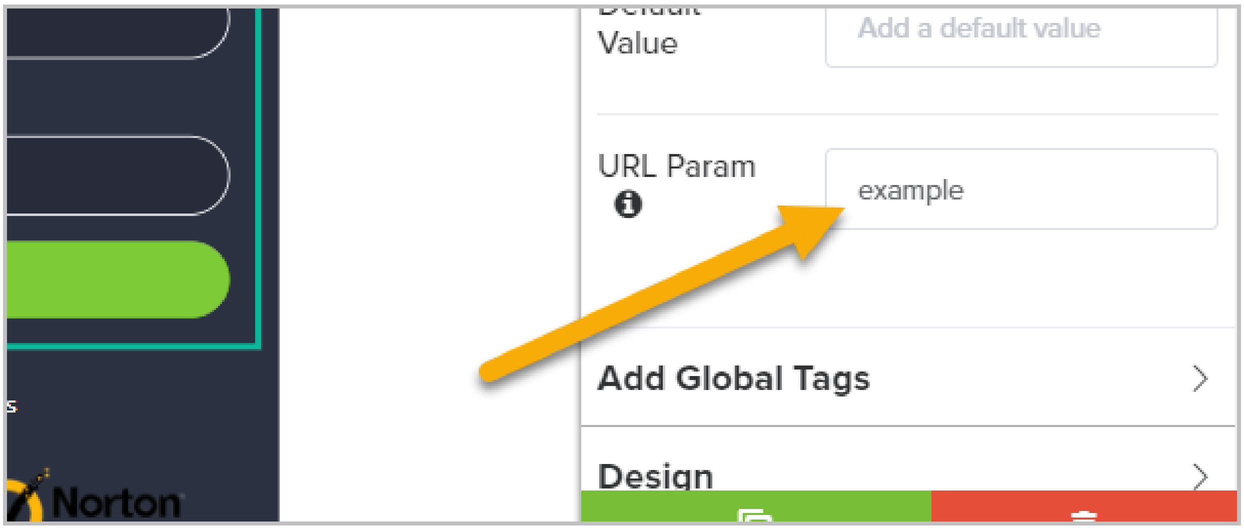
New Landing Page - Hidden Fields

You can now set a field "hidden" when building a landing page. Click here to learn more.



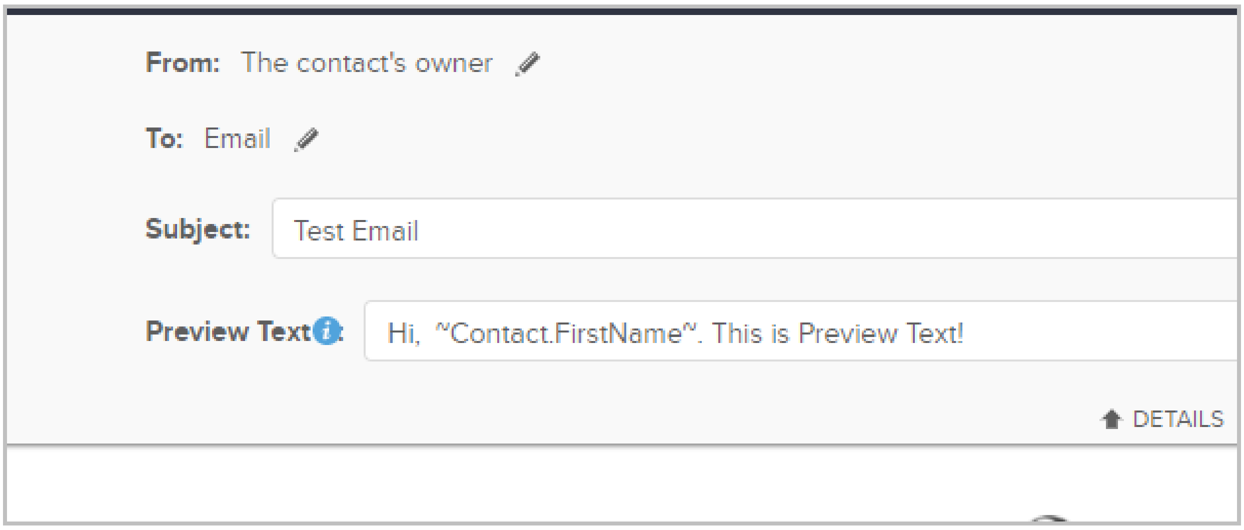
New Landing Pages - Custom URL Parameters

You can now send links that pre-fill form fields with a value that overrides the default merge value. Click here to learn more.



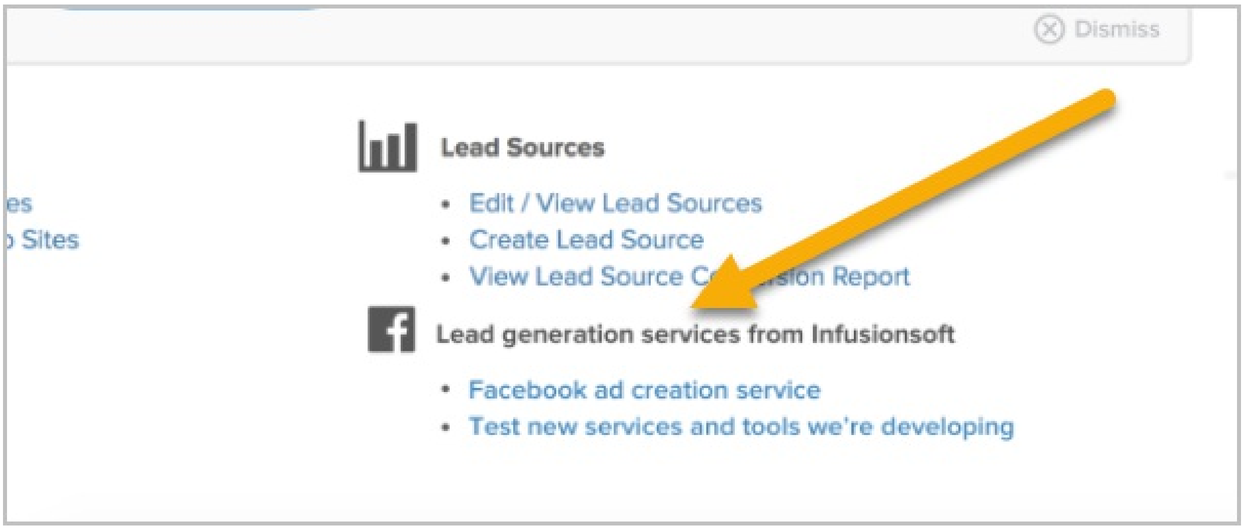
Email Builder - Edit Preview Text

You can now edit the text your recipients see in their email preview. Click here to see it in action!



Lead Generation Services

We've made it easier than ever for you to get help generating leads. Whether you'd like to connect with our services team and learn more about done-for-you advertising services or you'd like to be first in line to test new lead generation tools , you'll now be able to find what you're looking for on the Lead Generation page (Marketing > Lead Generation).



API Additions and Changes

Click here to see the latest update to the Infusionsoft API

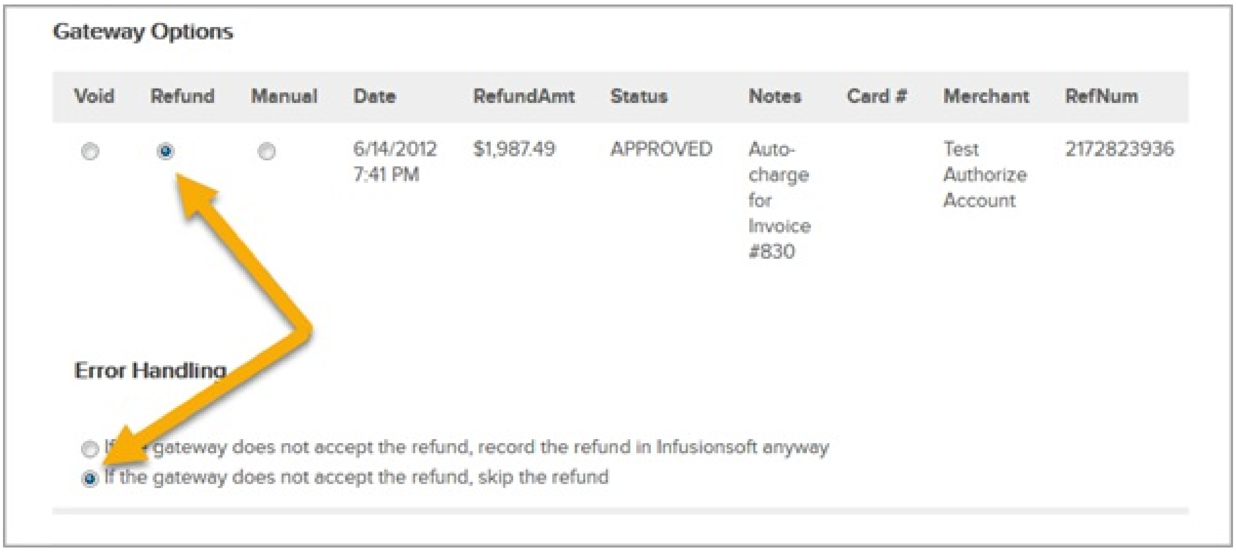
Using a different version of Infusionsoft? Click Here to learn more

December Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 2:02 pm MST

Refund Page Now Defaults to "Refund"

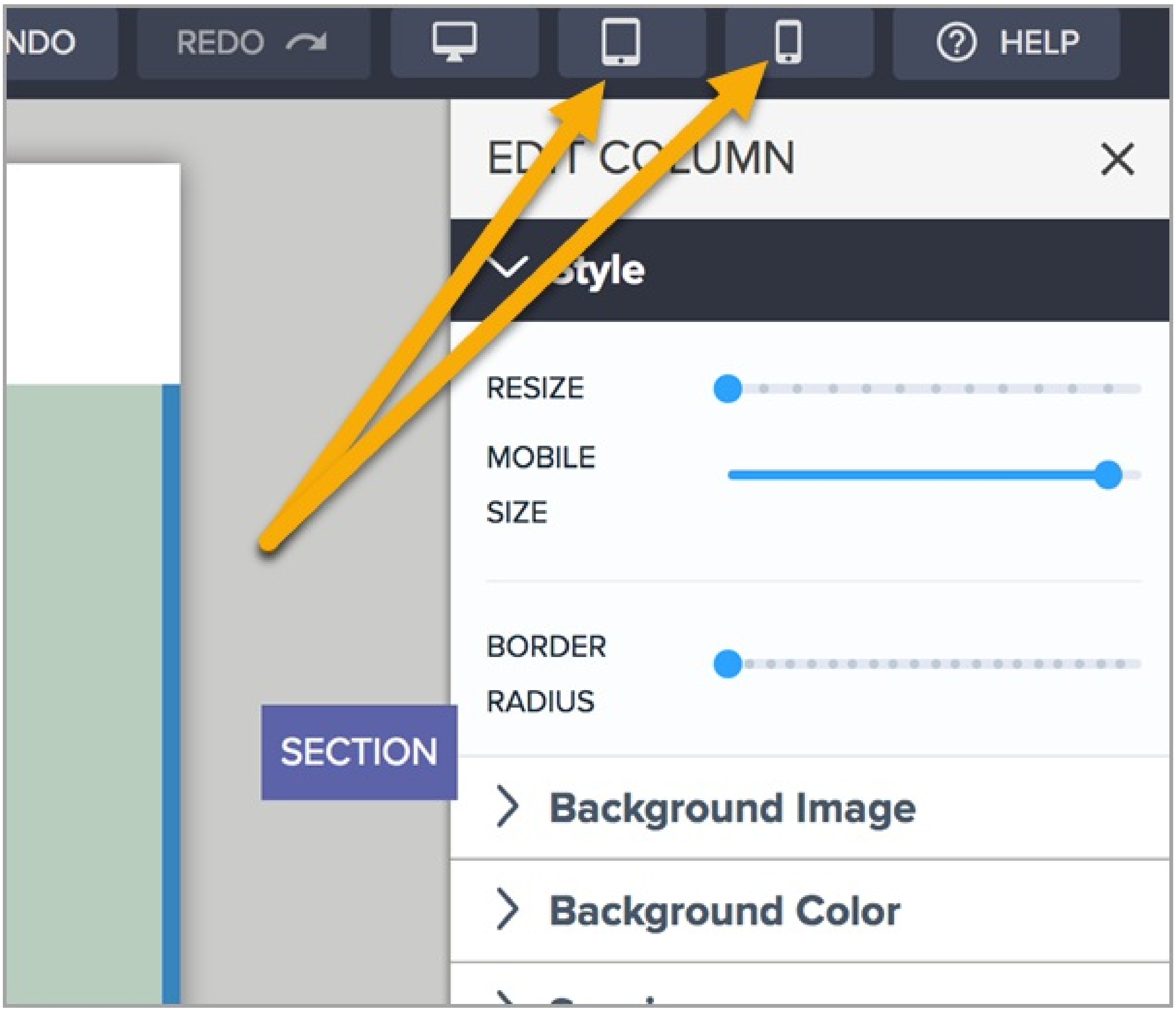
Please note that the Gateway Options on the Refund page now default to the**Refund** option. Also, the option to skip the refund if the gateway can't process it will also be default.



New Landing Pages Mobile Editor

You can now modify the look of your Landing Page when viewed on a mobile device. Just click the icon to start editing. The video below shows the steps to take in order to utilize this feature.

Just click the icon to start editing in mobile or desktop view, in real time..

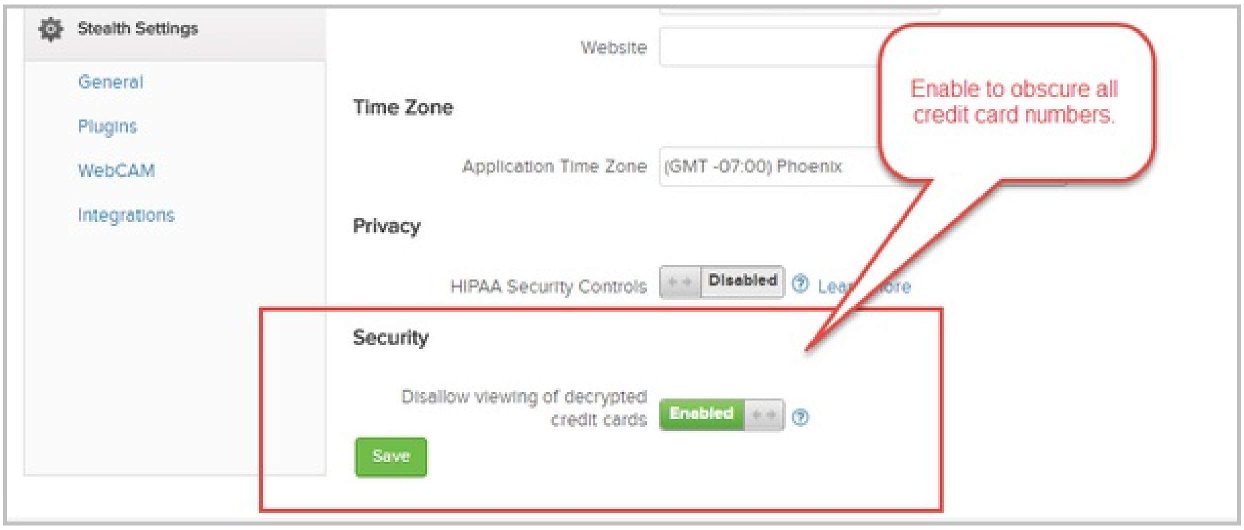


Disallow Viewing of Decrypted Credit Cards

Administrators can now obscure all credit card information removing the ability for any admin users to un-hide credit card details. This essentially locks-down all but the last four digits of a card from being displayed throughout Infusionsoft.

Please Note!
If you enable this setting, no admin users in your Infusionsoft account will be able to unhide password-protected credit card details...including you! You will need to contact our Support team if you decide to disable this feature later.

1. Go to **Admin** > **Settings** > **General** and scroll down to the bottom of the page
2. Click the button to enable the new security setting


Stealth Settings
General
Plugins
WebCAM
Integrations
Website
Time Zone
Application Time Zone
(GMT -07:00) Phoenix
Privacy
HIPAA Security Controls
Disabled
Security
Disallow viewing of decrypted credit cards
Enabled
Save
Enable to obscure all credit card numbers.

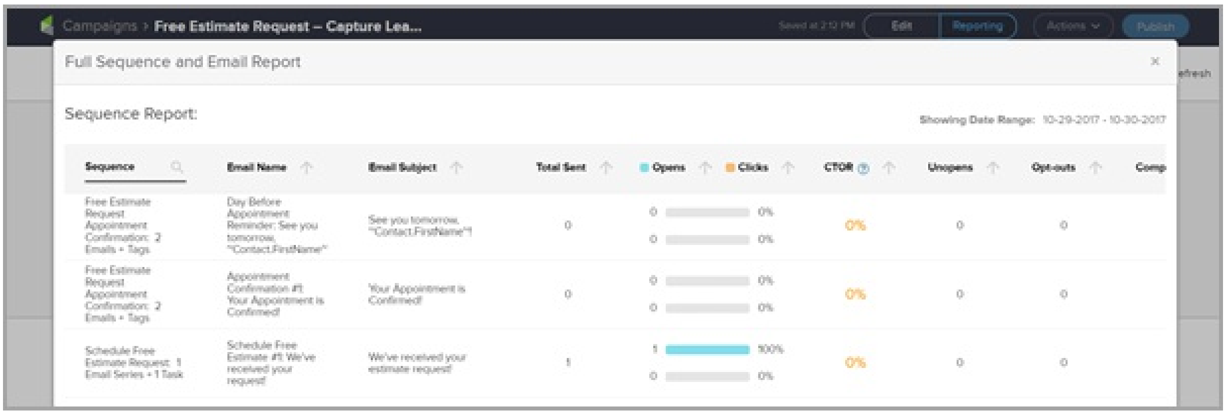
Using a different version of Infusionsoft? Click Here to learn more

November Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 2:02 pm MST

Campaign Sequence Email Report Update

You now have the ability to measure the performance of specific emails in a campaign sequence. See open rates, clicks, opt-outs and more. Check out this article to see how.



Nexus Merchants Integration

Nexus Merchants provides a bridge with popular merchant accounts such as Stripe and Braintree. When you integrate an account with the Nexus Merchants merchant gateway, you are able to process payments through any method (order forms, shopping cart, or manual orders). It will also handle auto-charges for subscriptions or payment plans.

REST API Contact Region Location Update

The Infusionsoft API has been updated to receive either the ISO code or the full name value. The full name value for any ISO code that is passed to Infusionsoft is what will be stored to the database. This resolves an issue where the opposite value (ISO code or full name value was being stored when being passed to Infusionsoft. For example, providing a region of “US-AZ” previously would result in “Arizona” being saved and a region of Arizona would result in “US-AZ” being saved. This change resolves that problem by always saving the full name value but still accepting either format (“US-AZ” or “Arizona”). This will affect integrations that are providing us a region of “Arizona” and are expecting “US-AZ” to be returned.

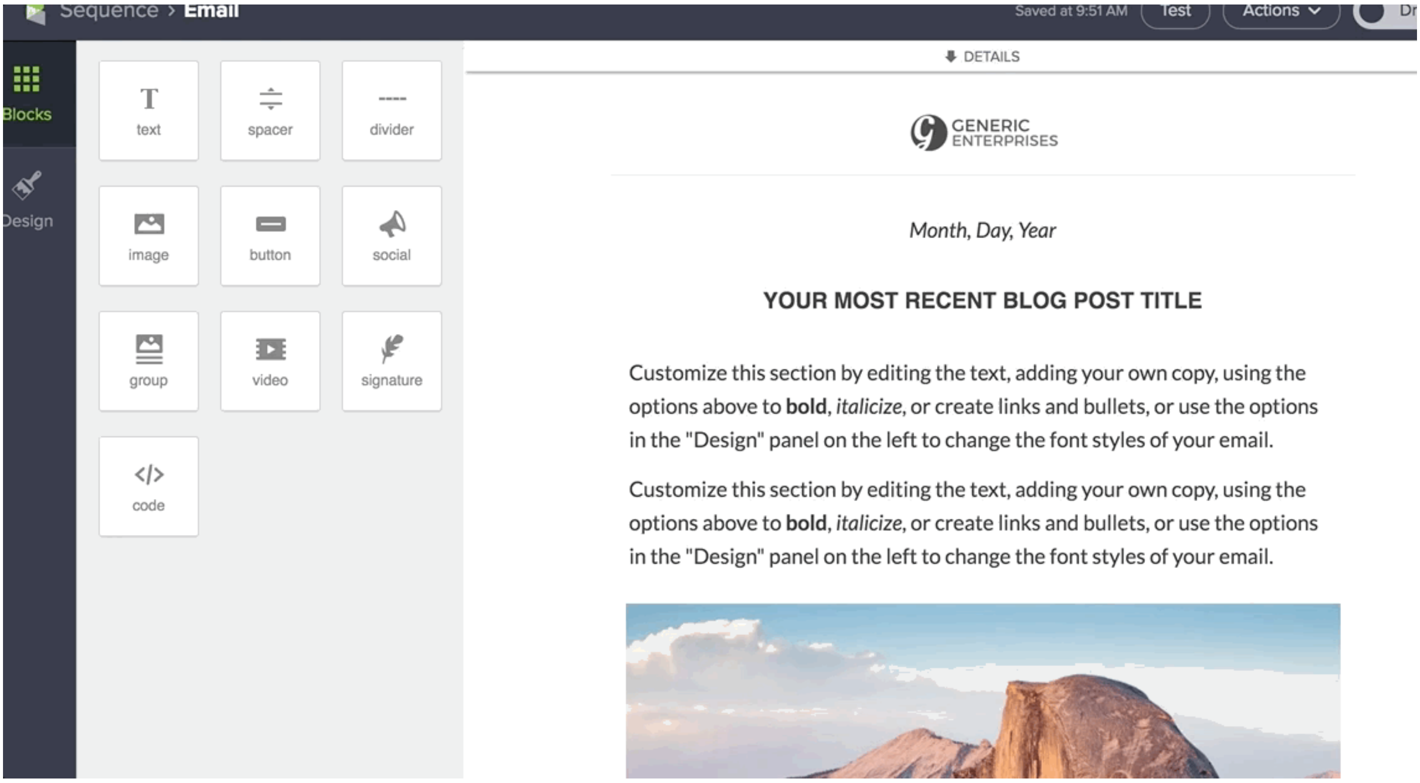
Important! This change will affect any REST API call which can return a contact location/region. Please click here to learn more.

HTML Snippet in Email Builder

You can now inject custom HTML into the Email Builder using the new Code Snippet

Important Note!
Using custom HTML in responsive emails could impact the way your email displays on different devices. Please test all emails before sending them to your entire customer list.

Just drag the code snippet into the email template and begin writing HTML in the panel on the left.



7-Day Rule Being Discontinued

Infusionsoft has discontinued the "7-day rule" behavior in Campaign Builder. If you frequently add marketing pieces to live, active campaigns, please take a moment to review this change .

Swedish Translation for External Pages

Several external pages will be automatically translated to Swedish based on the user's browser setting. Click here to view a full list of supported languages and external pages.

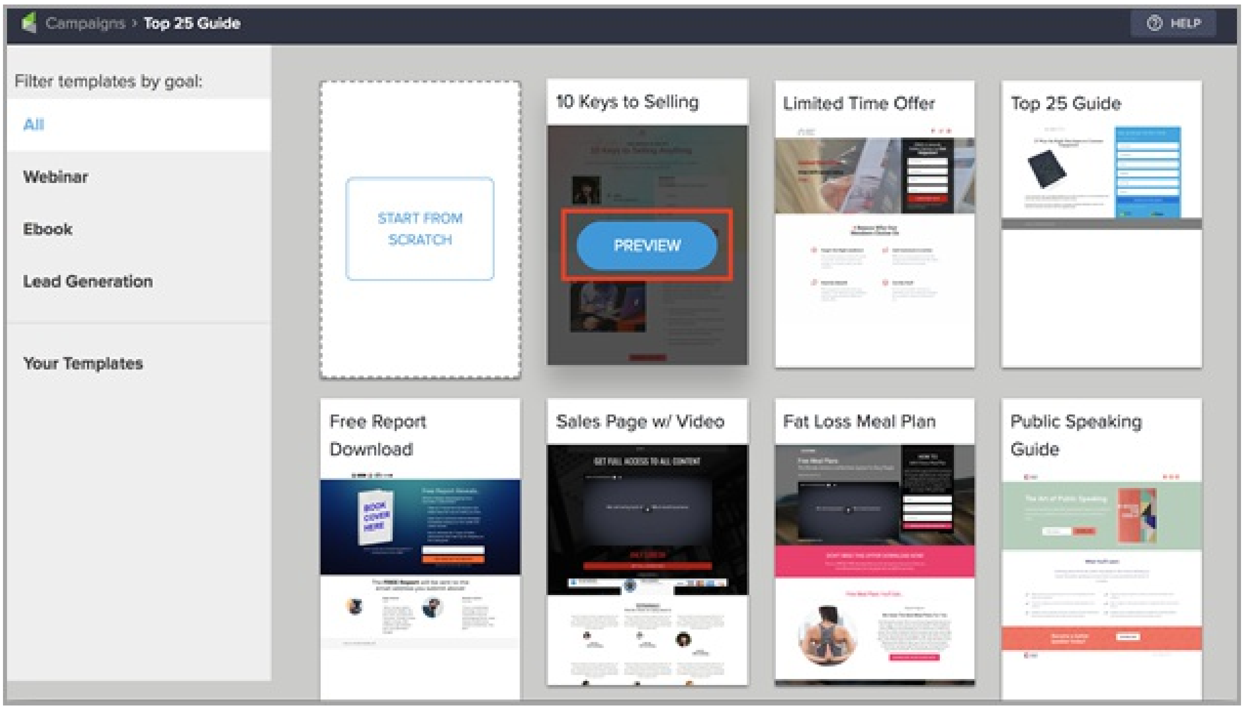
Using a different version of Infusionsoft? Click Here to learn more

October Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 2:01 pm MST

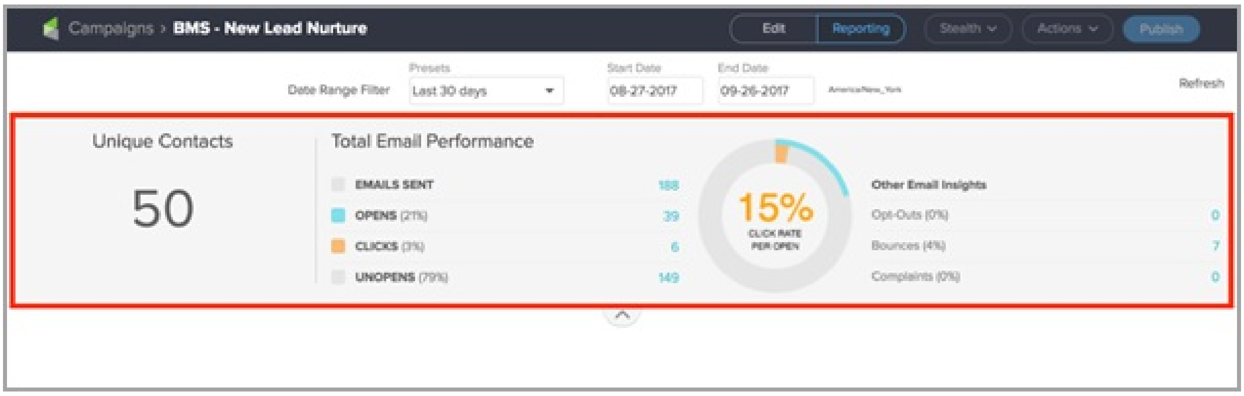
New Landing Page Builder

Easily create beautiful, high converting pages with New Landing Pages

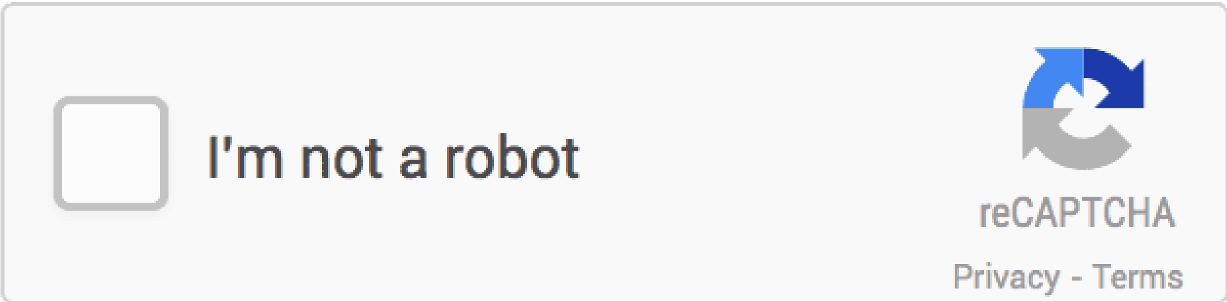


Campaign Performance Report Update

Learn how well your campaign is performing from within the Campaign Builder. Click here to learn more.



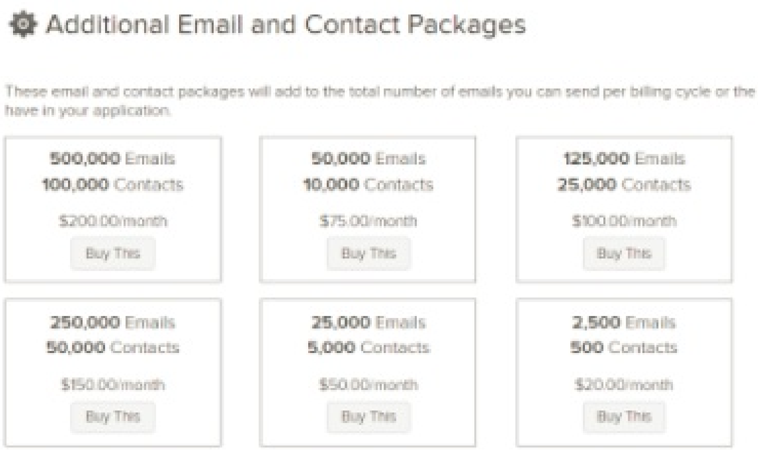
Invisible reCAPTCHA Update



Infusionsoft web forms and landing pages have been updated to utilize Google's Invisible reCAPTCHA, to help prevent spam email addresses from entering your system.

- For more information on this update to landing pages and webforms, please see the Invisible reCAPTCHA update article
- For answers to frequently asked questions about reCAPTCHA, please see the Infusionsoft reCAPTCHA FAQ article

Upgrade Contact/Email Levels Within The Application



Infusionsoft system administrators can sign into Infusionsoft to upgrade account functionality, and to purchase upgrades to contact/email levels.

- For instructions on purchasing upgrades to contact/email levels, please see the Upgrade Your Account Users or Email/Contact Levels article

Added Language Support For External Pages: Arabic, Dutch and Japanese

All external pages now support Arabic, Dutch and Japanese. These pages will display based on the user's browser language settings.

- For more information, and a list of supported languages in Infusionsoft, please see the Supported Languages For External Pages article

Using a different version of Infusionsoft? Click Here to learn more

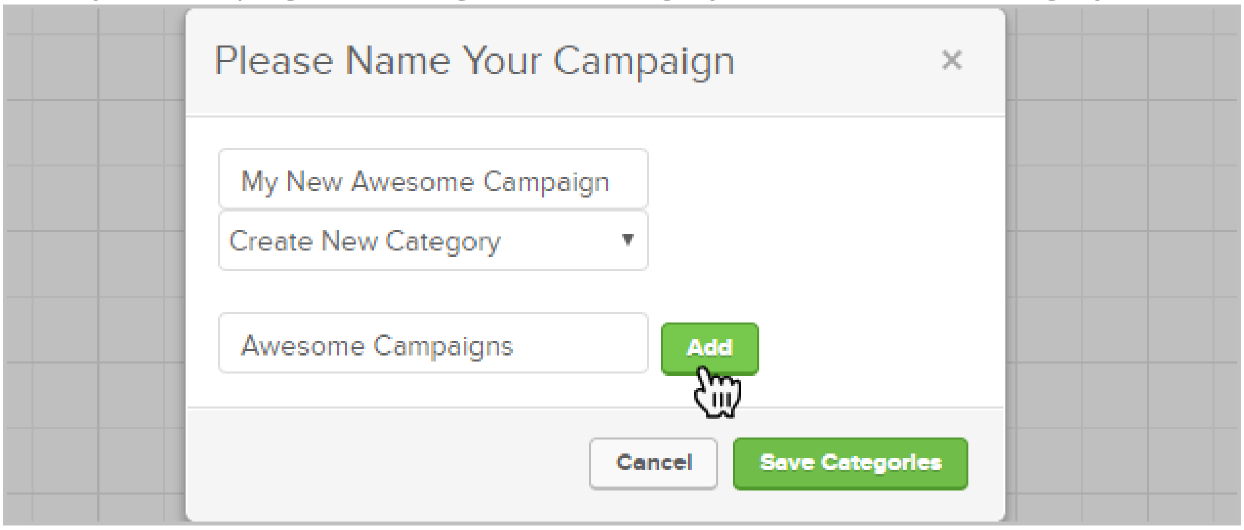
September Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 2:01 pm MST

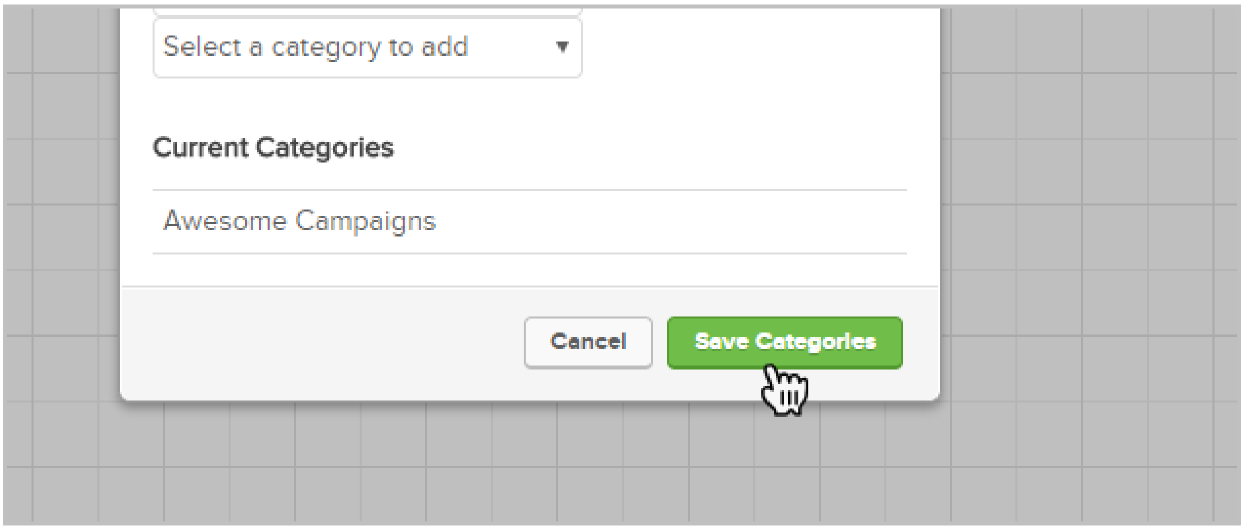
Categorize Your Campaign When Creating a New One

Moving forward, when you begin creating your campaign, you will have the option to both name and categorize the campaign.

1. Click the **Create Campaign** button
2. Name your campaign and assign it to a category or create a new category on-the-fly



3. Click the **Save Categories** button to start building your campaign!

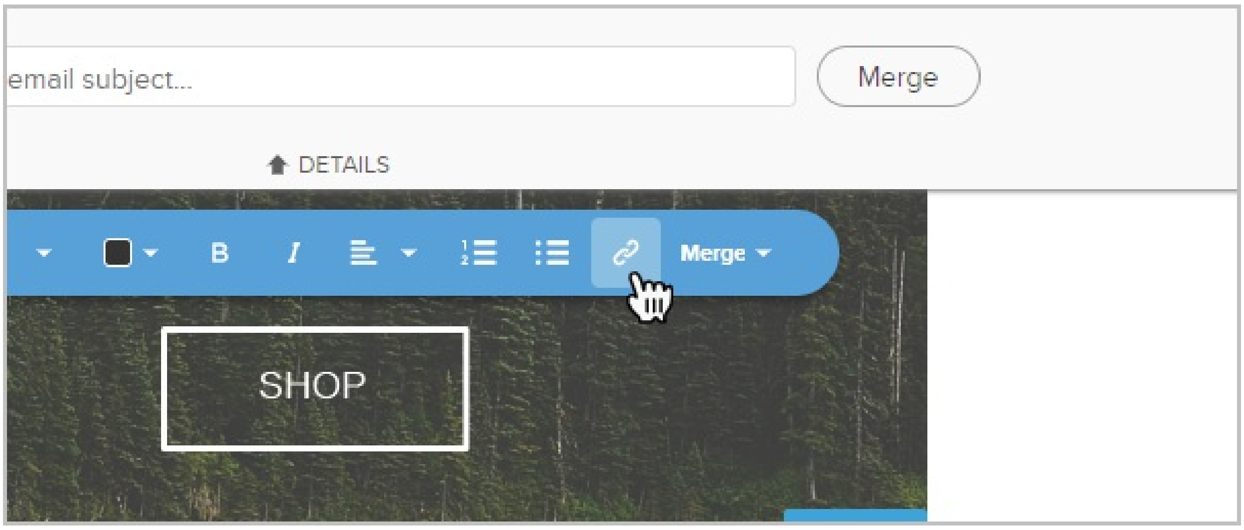


Test Your Decision Diamond logic

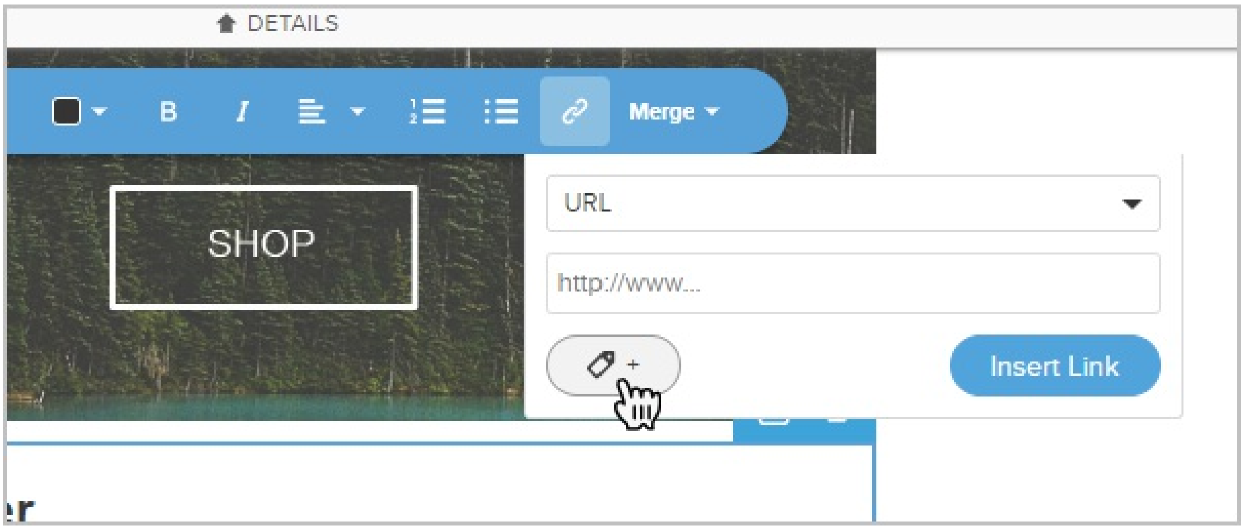
Publish with confidence! You can now test your decision diamond logic prior to publishing your campaign. Please refer to this new article for instructions and watch the video below

Categorize Tags When Creating Them in the Email Builder

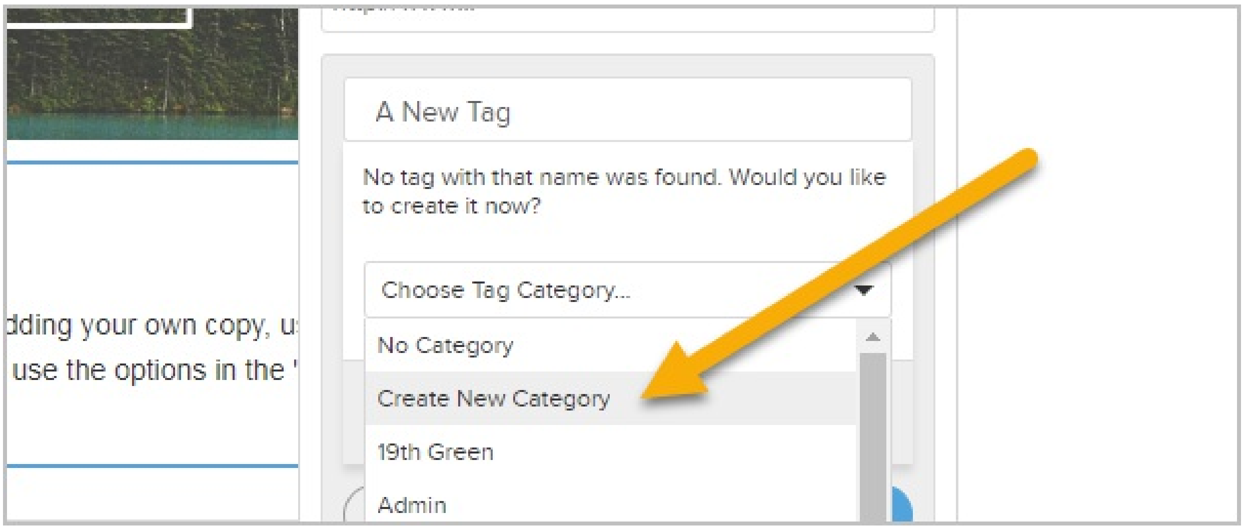
1. Highlight the text you would like to hyperlink and click the **Link icon**



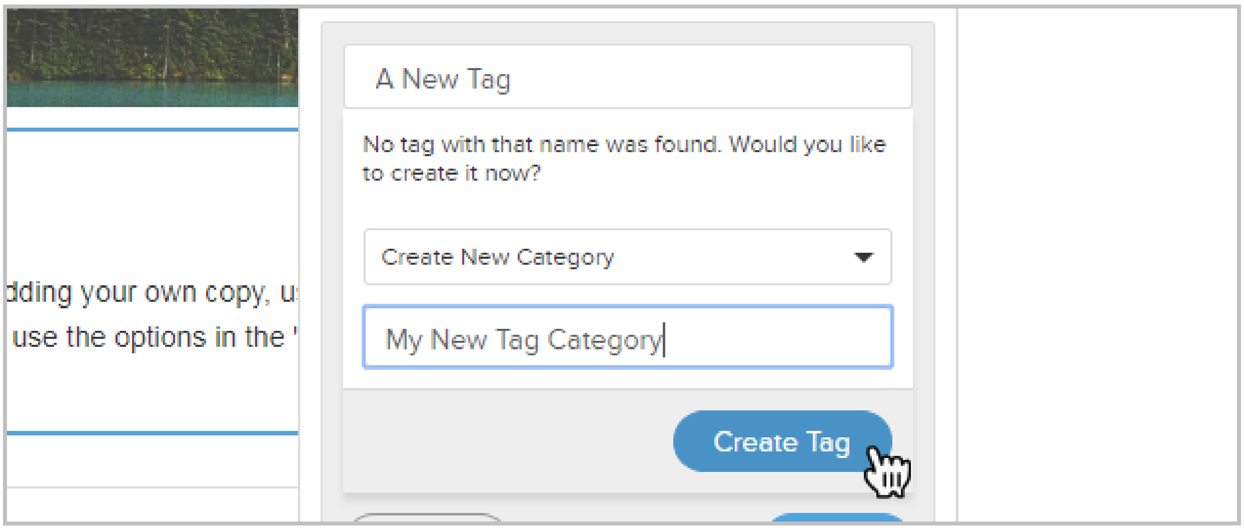
2. Click the **Tag** button and create a new tag



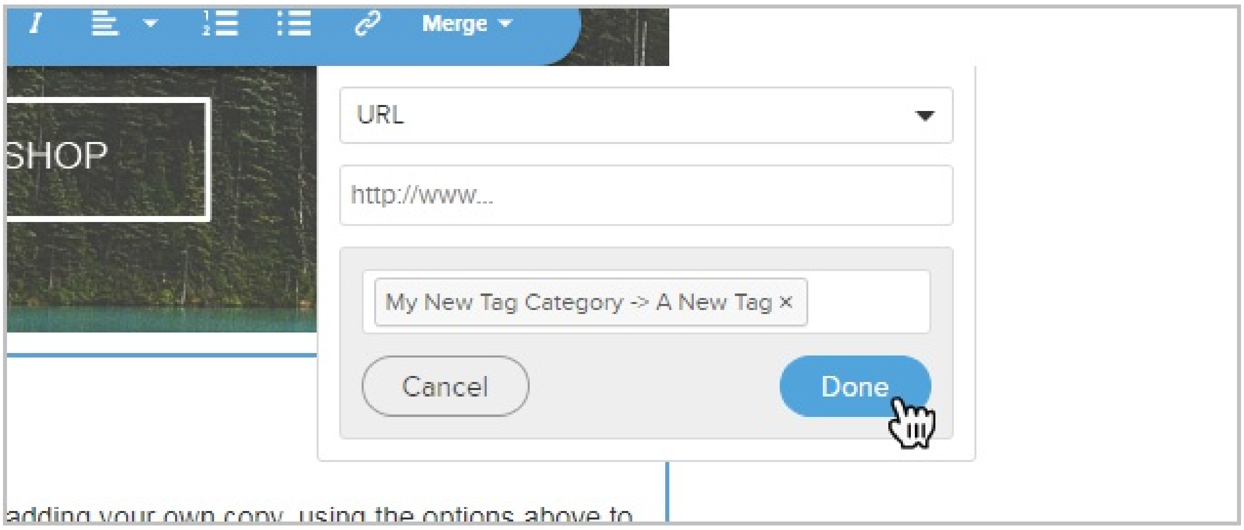
3. Note that you now have the option to create a new tag category on the fly.



4. Name your new tag category and click **Create Tag**



5. Click **Done** when you are finished configuring the link.



API Additions and Changes

Click here to view the latest updates with the Infusionsoft API

Using a different version of Infusionsoft? Click Here to learn more

August Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 2:00 pm MST

Automated List Management

List Hygiene is a crucial email marketing best practice and now Infusionsoft will take care of it for you. You now have access to two new email statuses and automation that will set these statuses for you. This feature replaces the manual List Hygiene process.

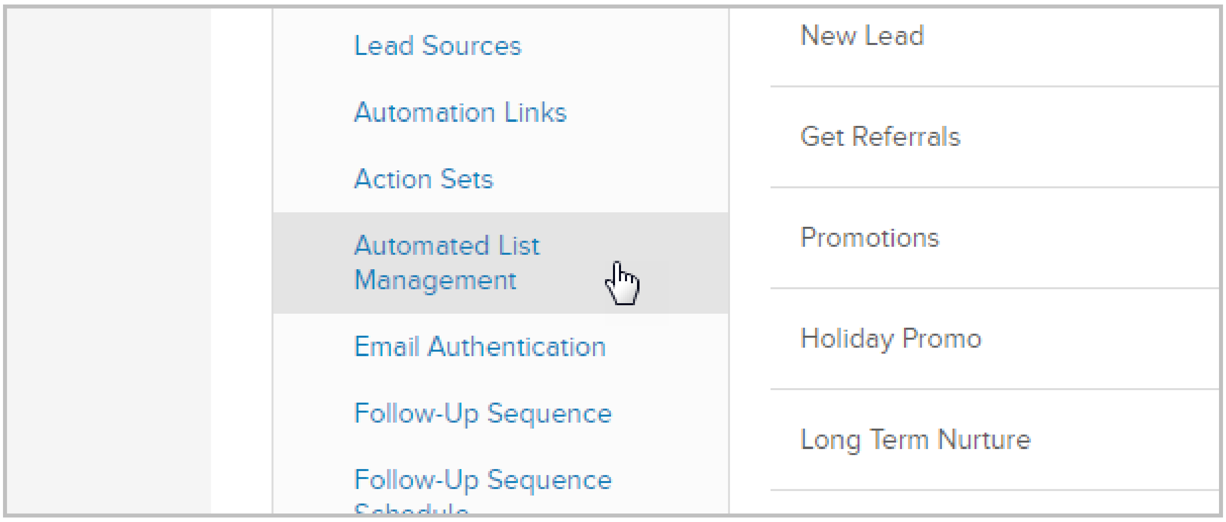
First, a definition of the 2 new statuses:

- **Unengaged Marketable Status** - These contacts are eligible to receive your automated marketing emails, but are tracked as not having engaged for a certain number of months. The default timeframe is 4 months.
- **Unengaged Non-Marketable Status** - These contacts will no longer be eligible to receive your automated marketing emails unless they engage with an email they've already received from you or submit an Infusionsoft web form.

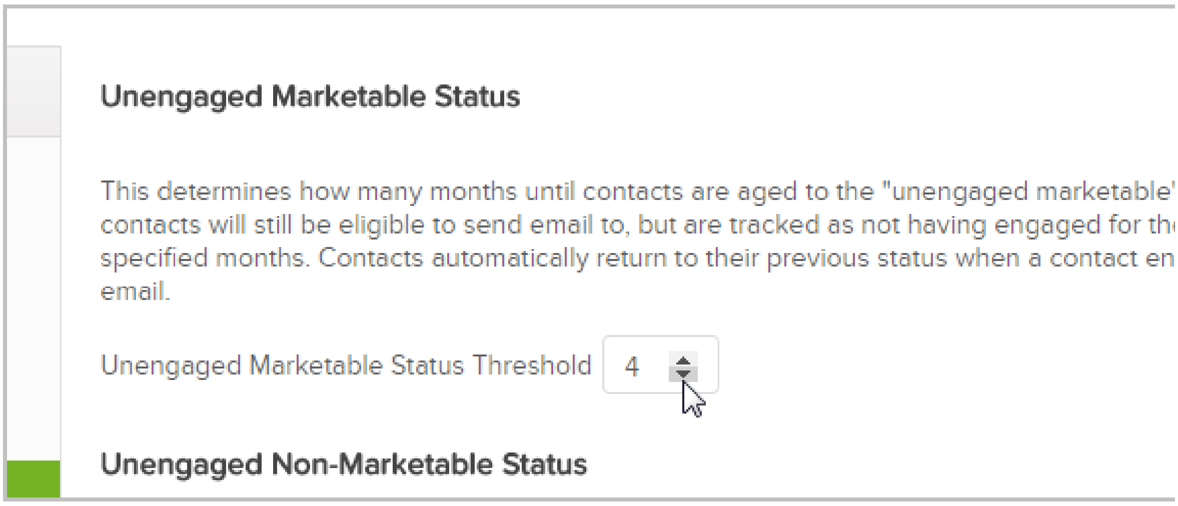
You can now set a "contact engagement threshold" (in months) which identifies and sets these two new statuses automatically.

There is a new settings section that allows you to customize when these email statuses are applied to a contact:

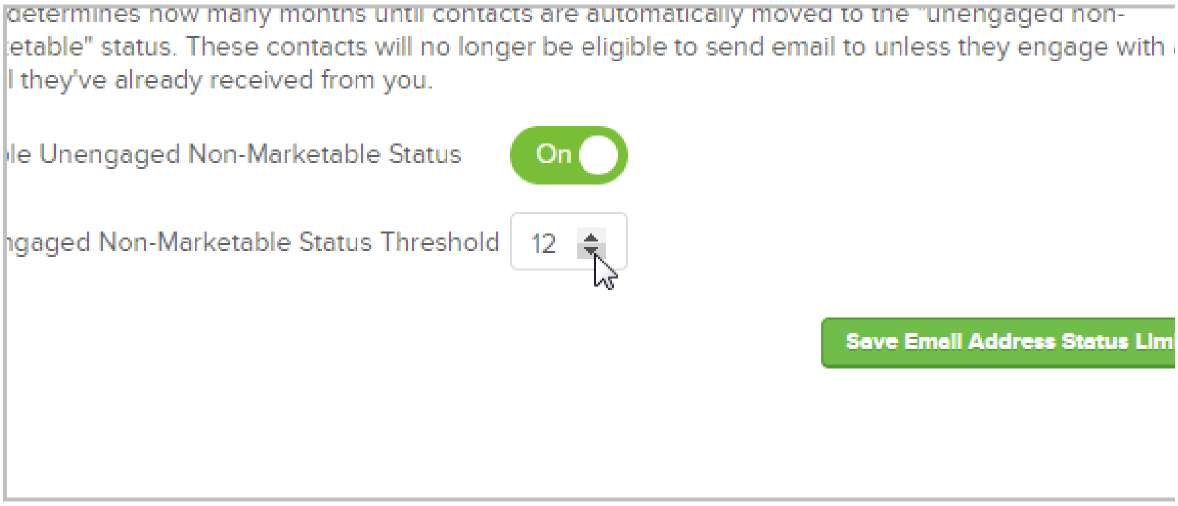
1. Go to **Marketing** > **Settings** in the main menu
2. Click on **Automated List Management**



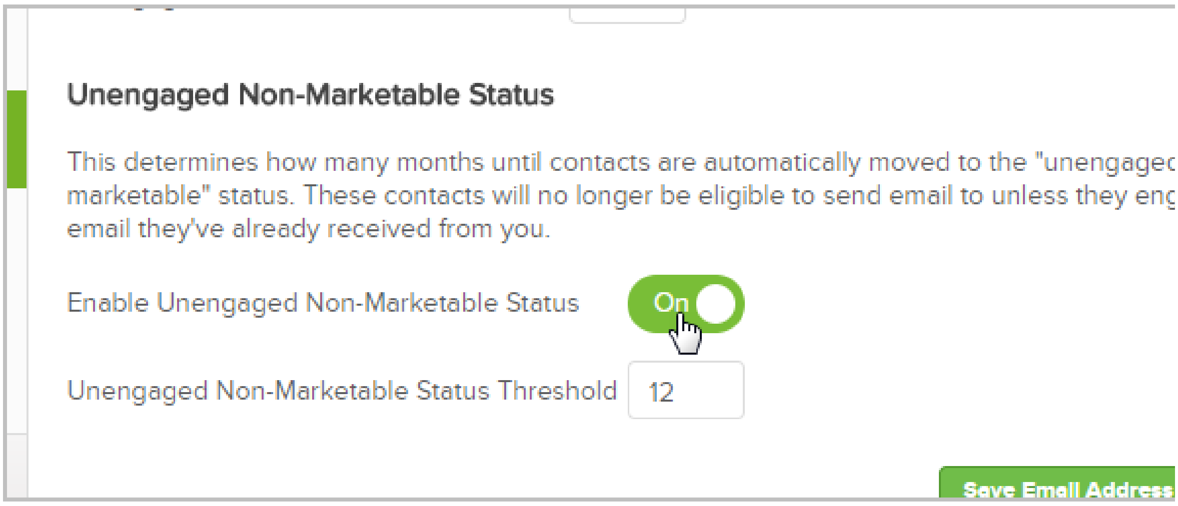
- **Unengaged Marketable Status** - As mentioned above, these contacts will still be eligible to receive your automated marketing emails, but are tracked as not having engaged for the number of specified months.
  - The default timeframe for this status is 4 months - which is the hard-coded policy currently in place. Based on this threshold, after 4 months with no engagements (opens, clicks, web form submissions), all contacts with confirmed or unconfirmed email status will automatically move to an Unengaged Marketable status. In this status, contacts are still eligible to be sent automated marketing emails, but keep in mind that no engagement after 4 months increases risks for excessive spam complaints or hard bounce s due to email accounts becoming inactive over time. Once these contact re-engage with your marketing efforts (open, click, or submit a web form) their email status will return to the previous state.



- **Unengaged Non-Marketable** - As mentioned above, these contacts will no longer be eligible to receive your automated marketing emails unless they re-engage (open, click, web form submission.) If they re-engage, their email status will return to its previous state.
    - Please toggle this **On** and set your timeframe. The default timeframe recommendation is 12 months, but you can adjust 1-24 months depending on your preference. It must be equal to or larger than the Unengaged Marketable threshold.



    - You can also disable this functionality by toggling the switch to the **OFF** position.

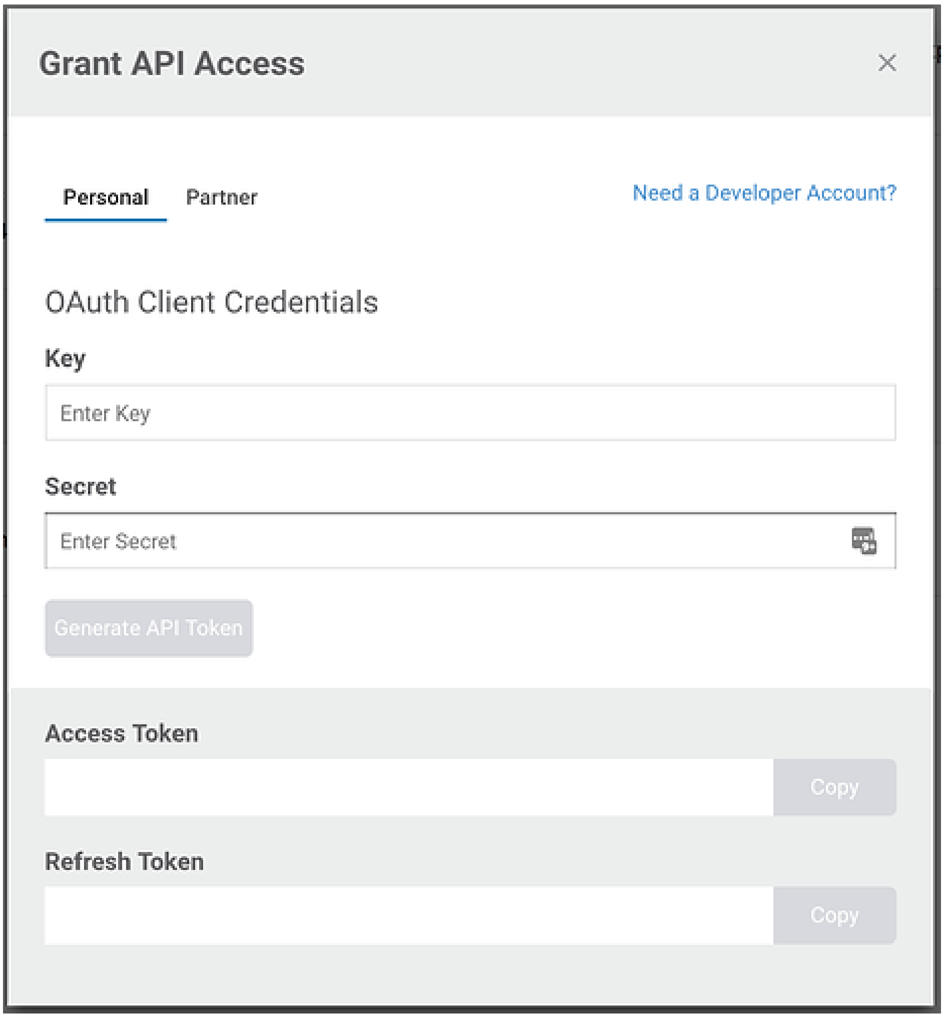


3. Click **Save Email Address Status Limits** to save your settings

Simplified OAuth Flow in Account Central

When a user logs into the account central page, http://signin.infusionsoft.com , they will experience a new link “API Access” on each app to which their user is connected. Everything described below can already be done programmatically through the API (that functionality will remain in place). This is just a way for the developer to not be required to implement quite as much code because we’re now handling some of the token generation for them.

“Partner” use requires the user to enter in the partners OAuth Client ID (provided by the partner to the customer). Clicking “Generate Auth Code” will generate an authorization code which the user can then give to the developer partner for the partner’s use in connecting to the user’s app.



If you are giving an authorization code to a 3rd party, be sure to have them pass in a redirect_uri of "null" when they request an Access Token. If the 3rd party attempts to request an access token without a redirect uri of "null", they may see the following error:

```
{    "error": "invalid_request",    "error_description": "Invalid redirect_uri"}
```

OR

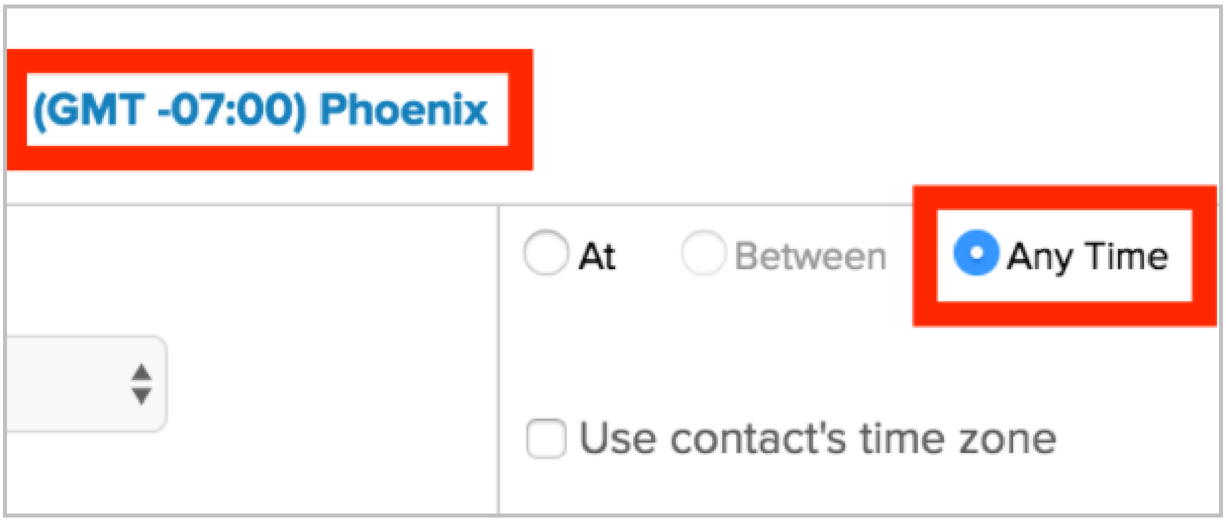
```
{    "error": "invalid_request",    "error_description": "Missing redirect_uri"} (edite
d)
```

Example of a valid request:

```
POST /token HTTP/1.1     Host: api.infusionsoft.com     Authorization: Basic czZCaGRSa3
F0MzpnWDFmQmF0M2JW     Content-Type: application/x-www-form-urlencoded     grant_type=a
uthorization_code&code=SplxlOBeZQQYbYS6WxSbIA     &redirect_uri=null
```

"Any Time" Now Available in Delay Timer

You no longer need to set an arbitrary time window if you want something to be sent at any time of the day. When setting up a delay timer in the campaign builder, just select the **Any Time** radio button. Note that you can change the timezone to **Use contact's time zone** by checking the box shown below:



Added Conversion Rates to Email Broadcast & Email Broadcast Conversion Reports

Quickly identify which emails are performing well and which may need to be optimized.

Opened	Clicked	Opt-Outs	Bounced	Opened Rate	Clicked Rate	Opt-Out Rate
0	0	0	0	0%	0%	0%
0	0	0	0	0%	0%	0%

1. Go to **Marketing** > **Reports**
2. Navigate to either the **Email Broadcast Report** or the **Email Broadcast Conversion Report**

New Permission for Non-Admin Users to Access DKIM Settings

You can now permission non-admin users to modify your DKIM settings. Click here to learn how.

Infusionsoft Sidebar Updates

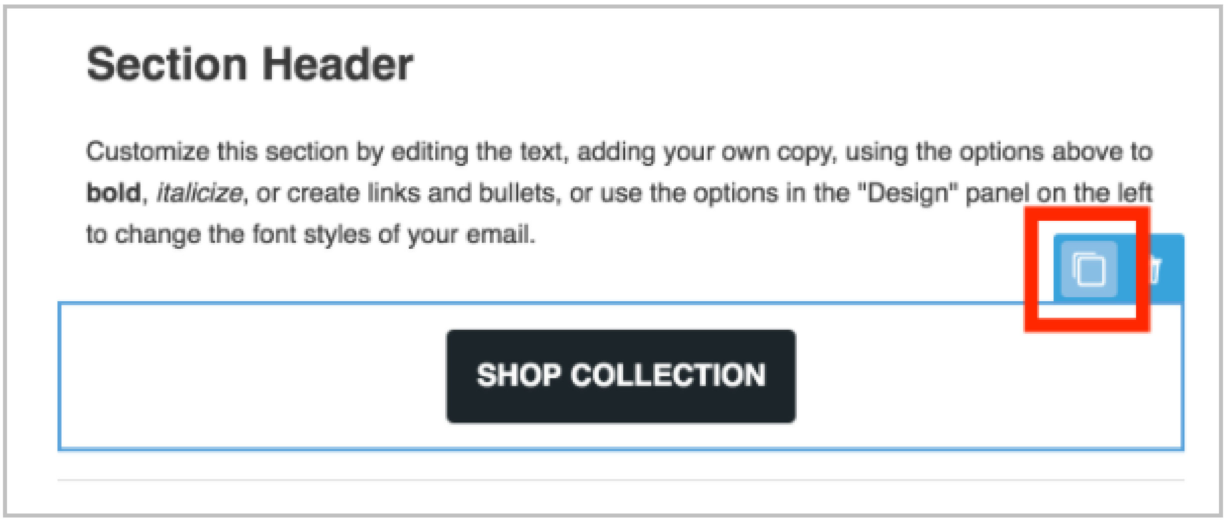
- Additional language support for: Spanish, French, Portuguese, Russian, and German
- Support for Outlook.com Agent
- Ability to see the campaign history and status of a contact. Click here to see the full article.

WordPress Opt-In Form Statistics

In the **Statistics** sidebar tab , you can view aggregate statistics for all of your WordPress opt-in forms over last 30 days and last 12 months

Email Builder: Button Links can now be cloned

When you clone a button in the Email Builder, you now clone the link as well. Previously, you had to manually re-enter the link URL every time you cloned a button.



API Updates

API Documentation

- Updated text to recommend providing your access token as a Bearer token through an Authorization request header.
- Documentation now allows copy/paste of body sample text.
- Added emphasized link to our new OAuth guide .
- Added callouts to certain Contact endpoints explaining how to opt-in a contact .

General API

- New operation added: Apply Tag to Contacts .
- New operation added: Remove Tag from Contacts .
- Removed erroneous duplicate check option from Create or Update a Contact . Valid options are Email or EmailAndName.

REST Hooks

- The Infusionsoft REST API now supports RESTHooks.org's "delayed confirmation" of subscriptions .

We've also added a significant number of Hooks:

- Added appointment.*.
- Added company.*.
- Added invoice.payment.*.
- Added note.*.
- Added subscription.*.

As always, please refer to List Hook Event Types for an up-to-date list of available REST Hooks.

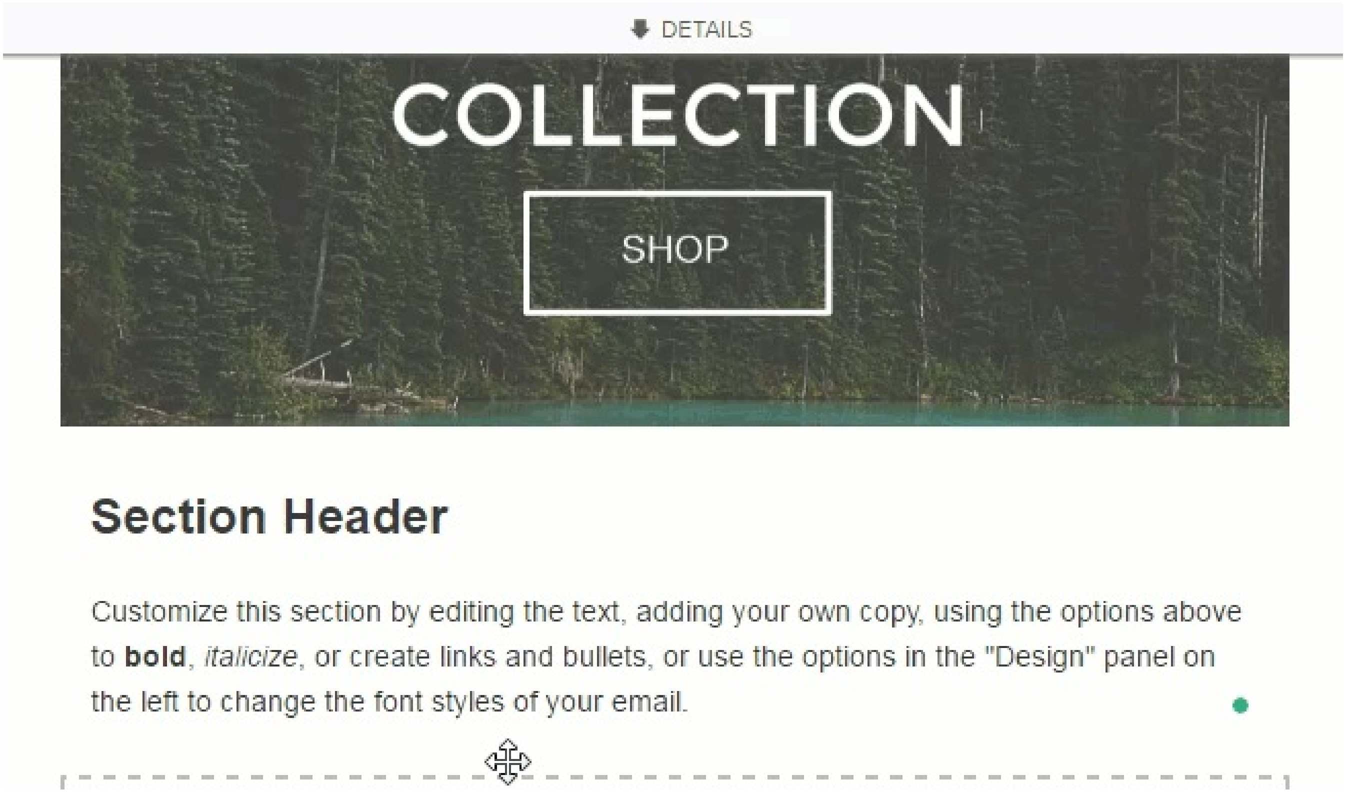
Using a different version of Infusionsoft? Click Here to learn more

July Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 1:05 pm MST

Floating Text Bar Editor

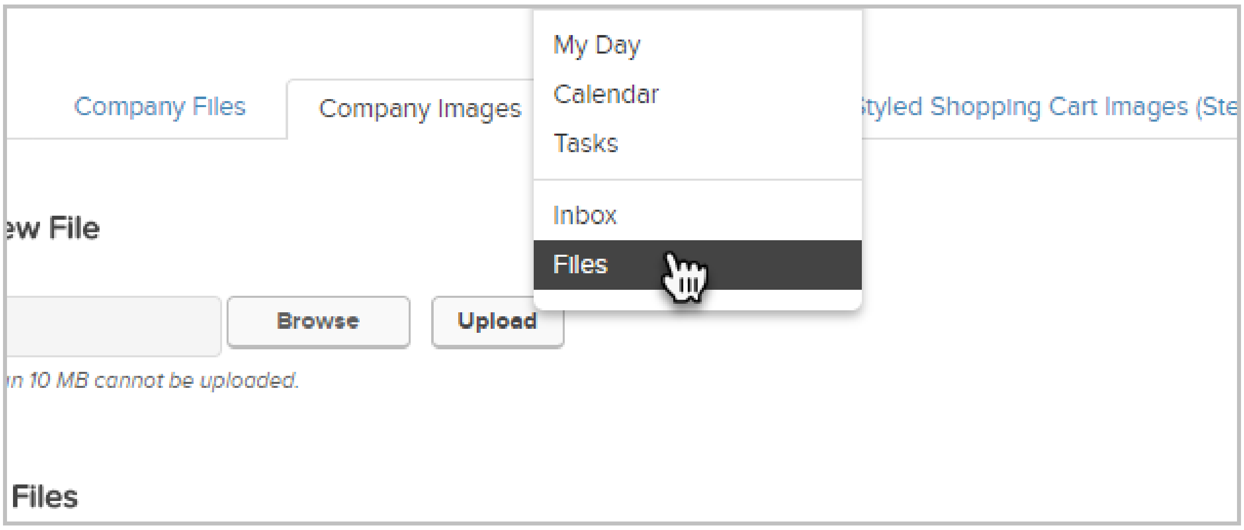
You can now edit text more easily with a floating text bar editor. This allows you edit a tall block of text without having to scroll up and down to access the tools needed for editing. The toolbar tucks away when the textbox is no longer in sight and re-appears when the text block scrolls into view. To see the new feature, just click inside a text block in the Email Builder.



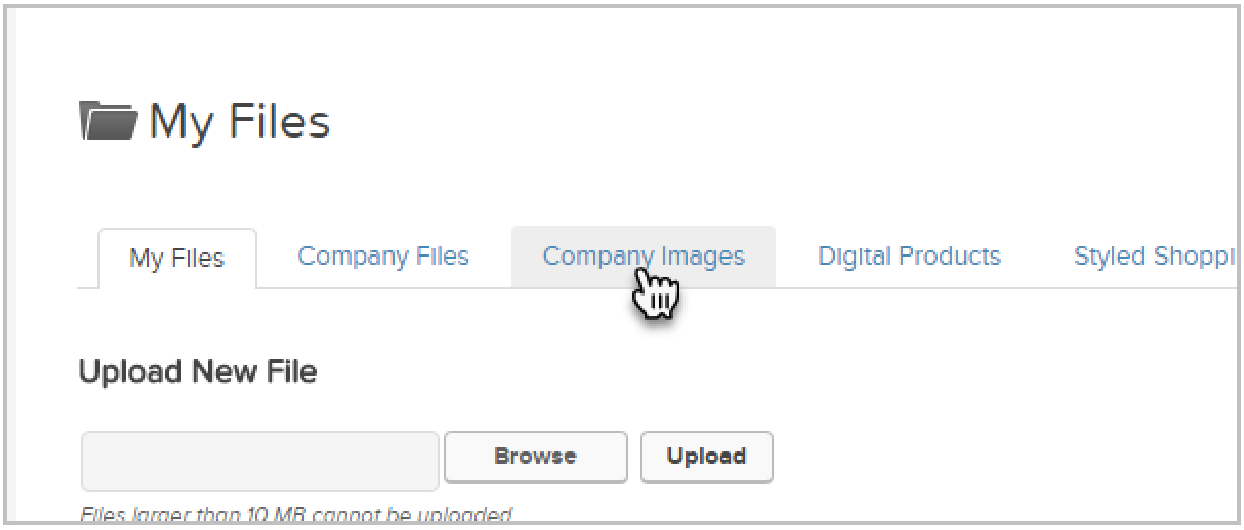
Filebox Improvement: Image Preview & Download

You can now view thumbnails in the Company Images tab in your My Files page.

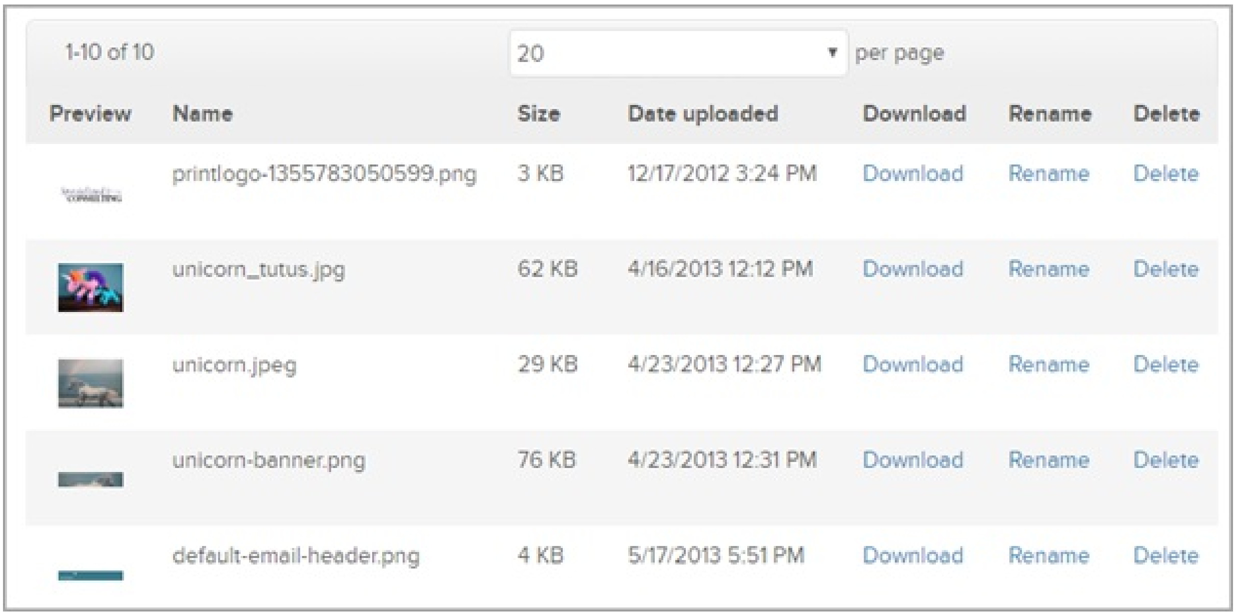
1. Hover over the Home icon and click Files



2. Click Company Images



3. Click on the thumbnail image on the left to see a larger version of the image in a new tab. Click on the Download link to download the image to your computer.

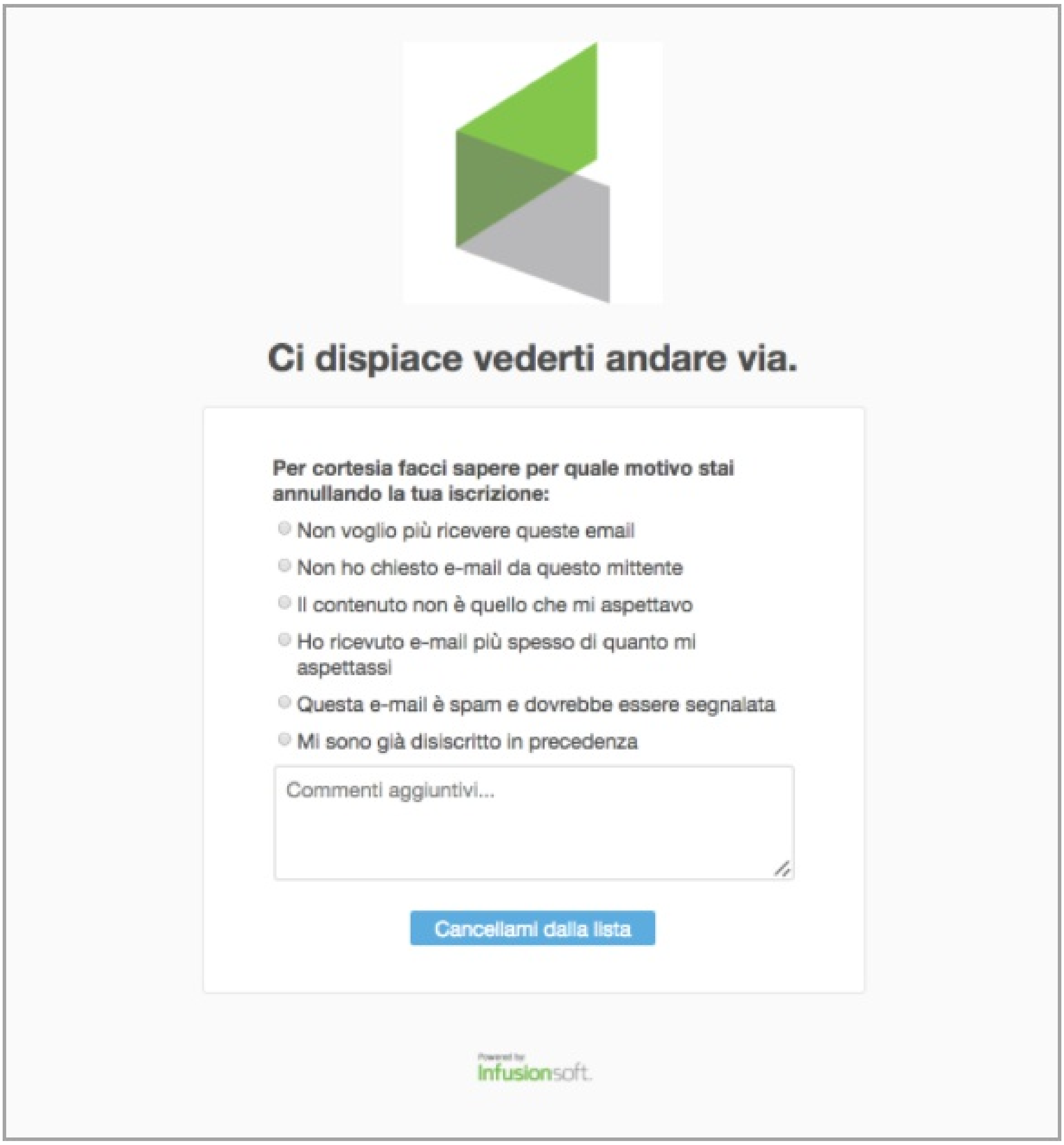

1-10 of 10 — 20 per page

Preview	Name	Size	Date uploaded	Download	Rename	Delete
	printlogo-1355783050599.png	3 KB	12/17/2012 3:24 PM	Download	Rename	Delete
	unicorn_tutus.jpg	62 KB	4/16/2013 12:12 PM	Download	Rename	Delete
	unicorn.jpeg	29 KB	4/23/2013 12:27 PM	Download	Rename	Delete
	unicorn-banner.png	76 KB	4/23/2013 12:31 PM	Download	Rename	Delete
	default-email-header.png	4 KB	5/17/2013 5:51 PM	Download	Rename	Delete

Native Italian Translation Available for End-User Assets

Infusionsoft will natively translate the following assets for your Italian-speaking audience:

- Confirmation Pages
- Opt-in / Opt-Out Pages
- Invoices
- Order Forms
- Quotes
- Shopping Cart

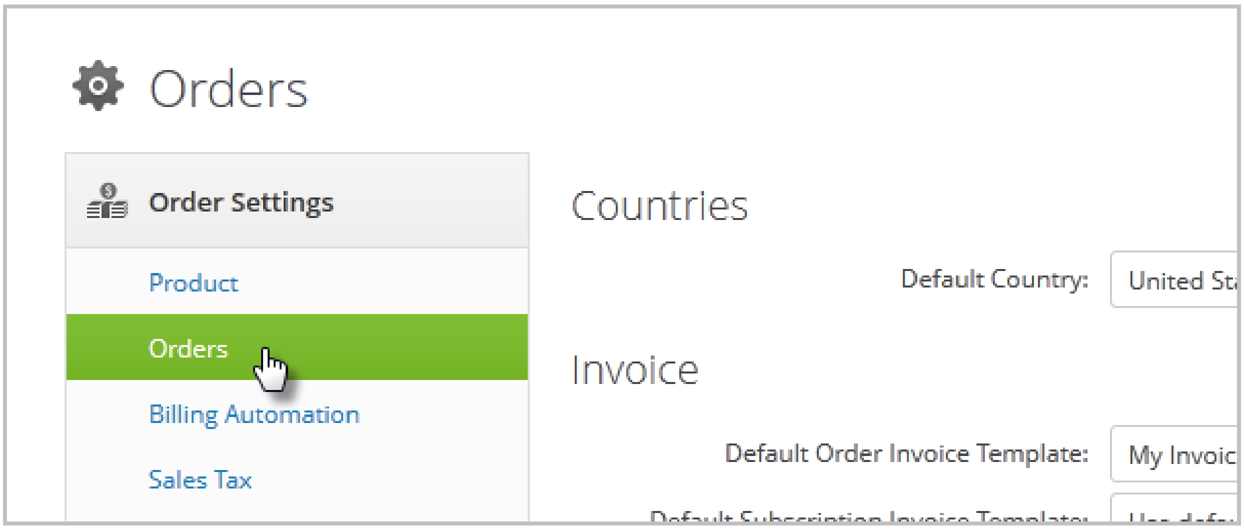


Added HKD and VND Currency

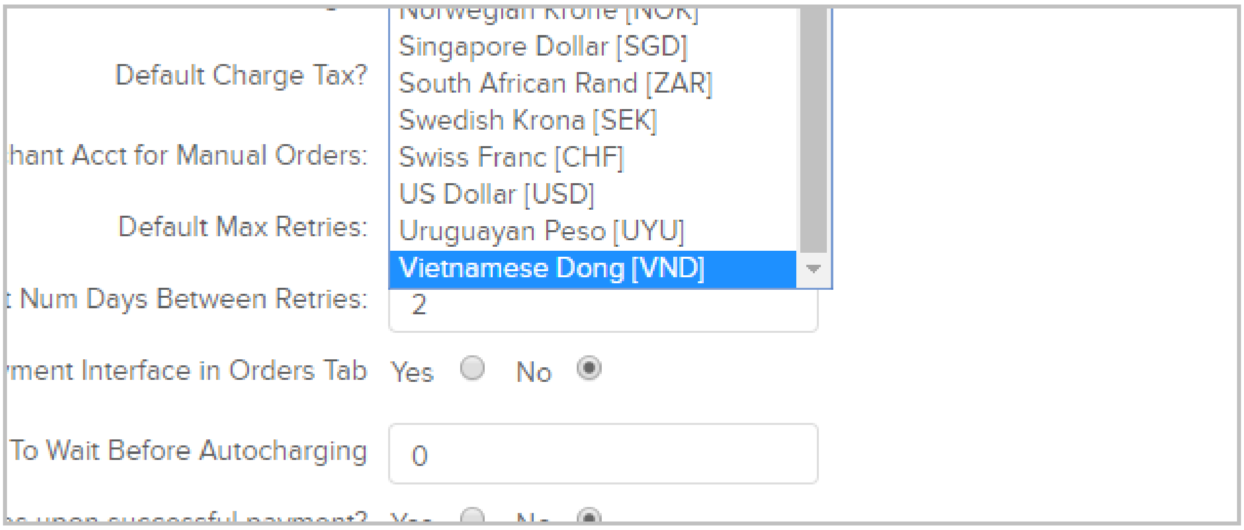
Infusionsoft now supports the Hong Kong Dollar and Vietnamese Dong currencies. To set one of these as your native currency:

1. Ecommerce > Settings

2. Click on Orders



3. Change your Currency Locale



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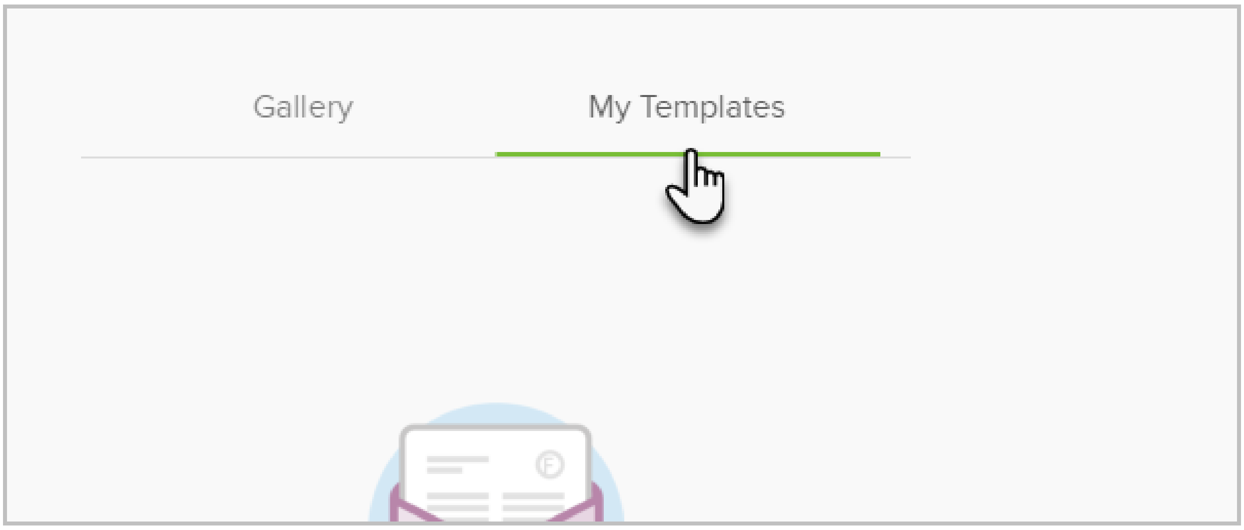
June Update 2017 | Classic Infusionsoft

Last Modified on 06/21/2018 1:05 pm MST

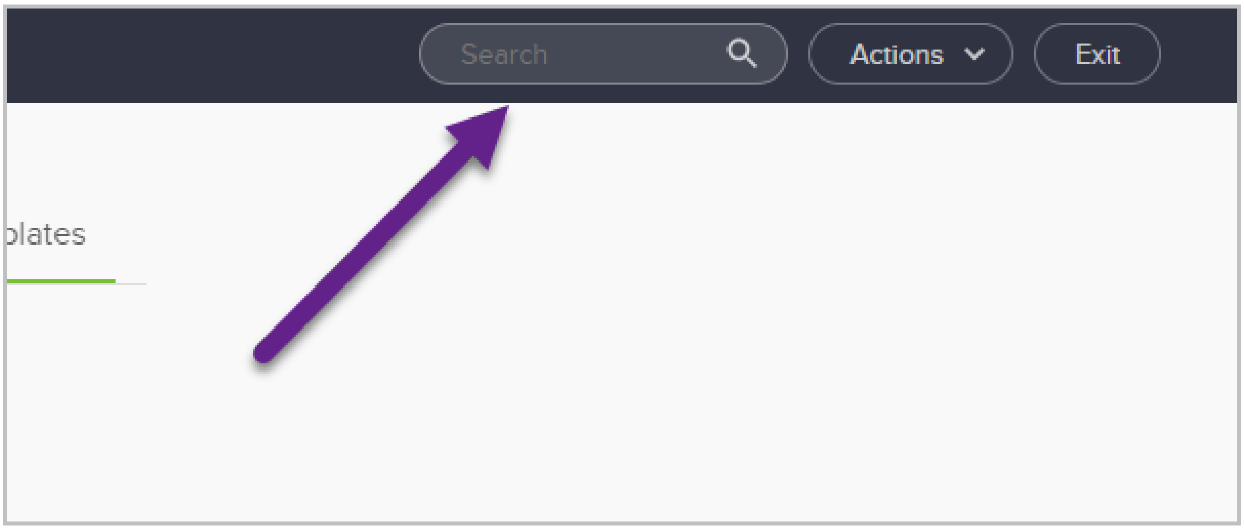
Email Builder Improvement: Ability to Search/Filter Email Templates

Find your Email Builder templates more easily by searching for them.

1. Navigate to My Templates while in the new Email Builder gallery view



2. Navigate to the Search field in the top right corner of the main navigation bar



3. Type the name of the template you are searching for

Pro-Tip! Templates automatically filter as you type – pressing the enter key is not required.

Longer Active Session Times

We have made some changes under the hood to greatly extend session times so that you won't be logged out and lose progress while working in Infusionsoft.

- If you are actively using Infusionsoft, a single session can be run continuously for 3 full days.

- If you are inactive for a set period of time (for the average person, 2 hours), then you will be given a 90-second timeout warning/countdown. After the countdown, if you have not shown activity, then your session will be logged out.
- To protect your customer's credit cards, a user with sufficient permissions to view credit cards is required to provide a password once every 15 minutes when they attempt to view a credit card. This password challenge does not impact sessions being logged out - It does, however, log user attempts to view credit cards, and will lock the behavior down after multiple invalid passwords are entered.

Improved Email Sending Performance

We have greatly increased email sending performance for those that send very large email batches.

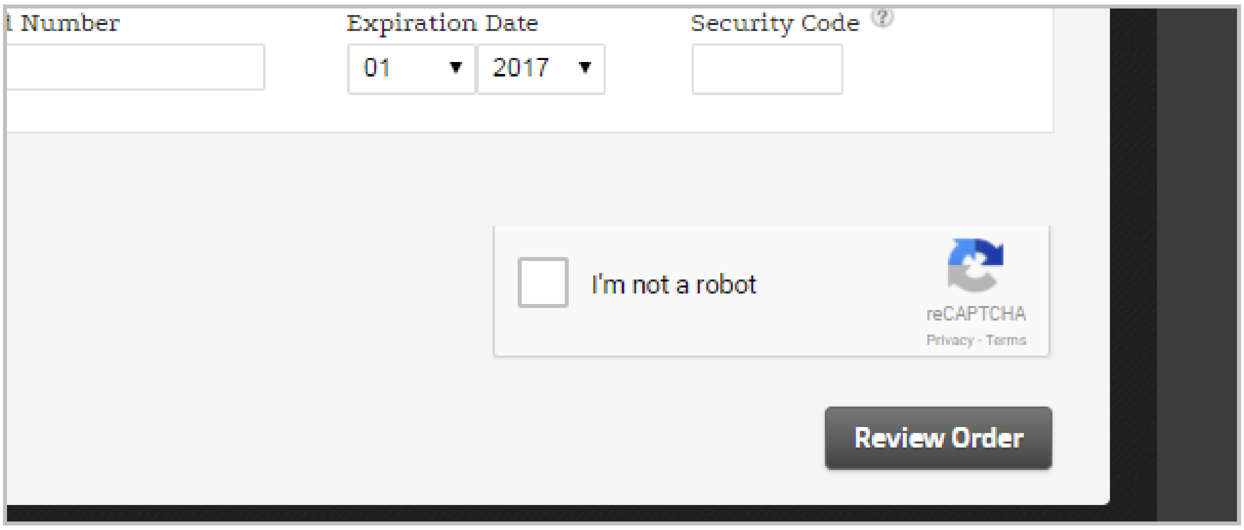
- Improved the calculation and increased the accuracy of emails sent per second rate
- Tuned and reindexed email sending related to database queries/updates
- Updated and tuned the Mail Transfer Agent (MTA)
- Improved the queuing of emails scheduled to be sent in the future

As a result, we have seen a 300+% increase related to email sending rates!

Increased Security on Order Forms & Shopping Cart

We have implemented a new security feature to prevent bots from using an Infusionsoft order form or shopping cart to test fraudulently obtained credit card numbers.

After the first failed credit card attempt on an order, we have implemented a Google reCAPTCHA as shown below:



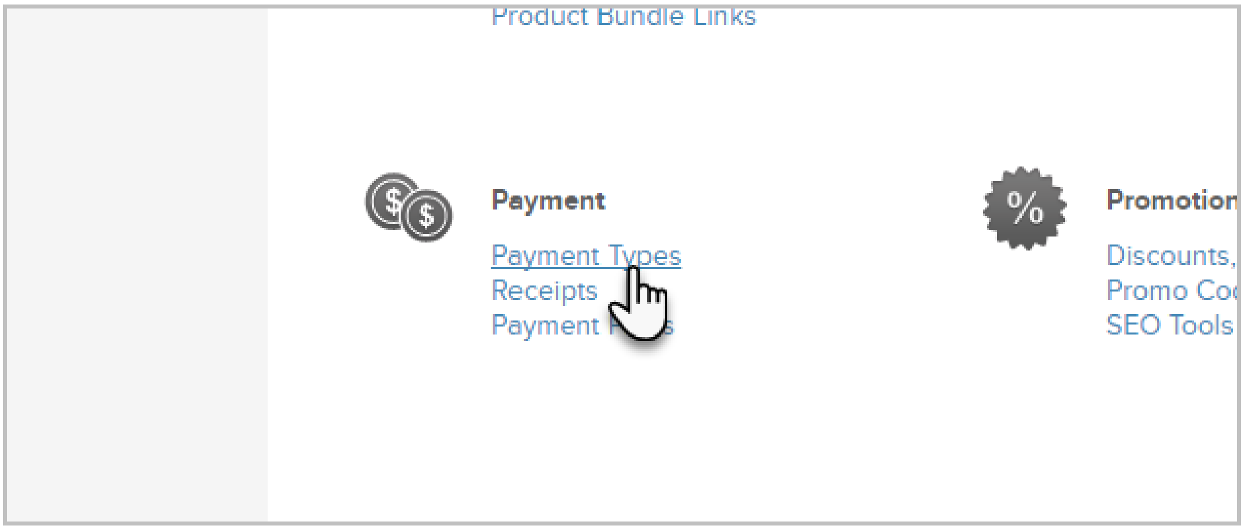
PayPal Update: One Click Authentication for PayPal Express Checkout

We've made it easier to connect your PayPal Express Checkout to your Infusionsoft account.Click here to see how!

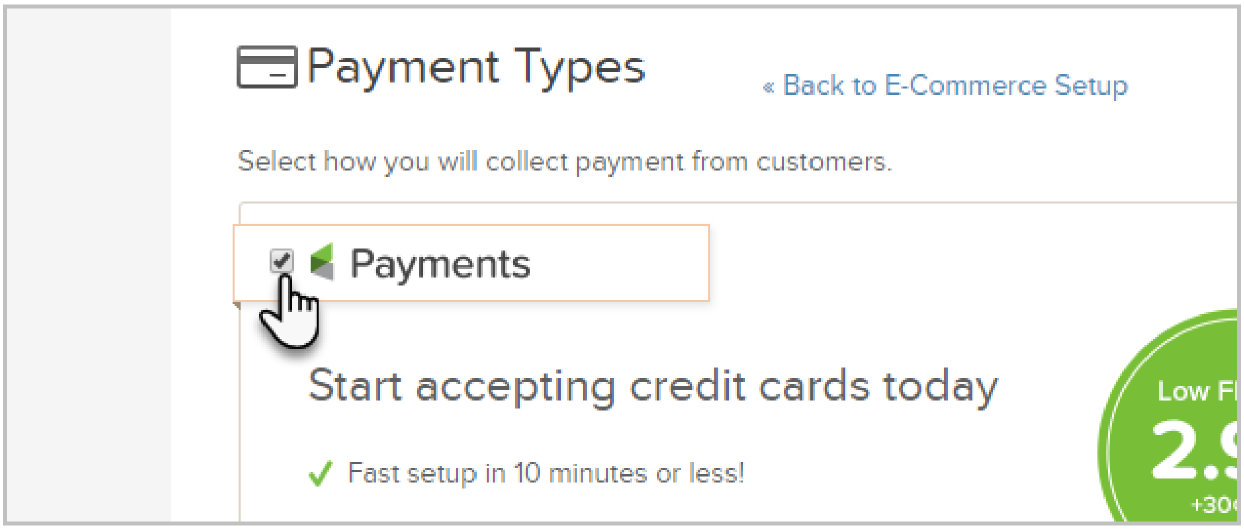
Infusionsoft Payments Update: View Fees Disclosure for Canadian Users

We now provide a convenient link to the publish fees associated with Infusionsoft Payments for Canadian processing.

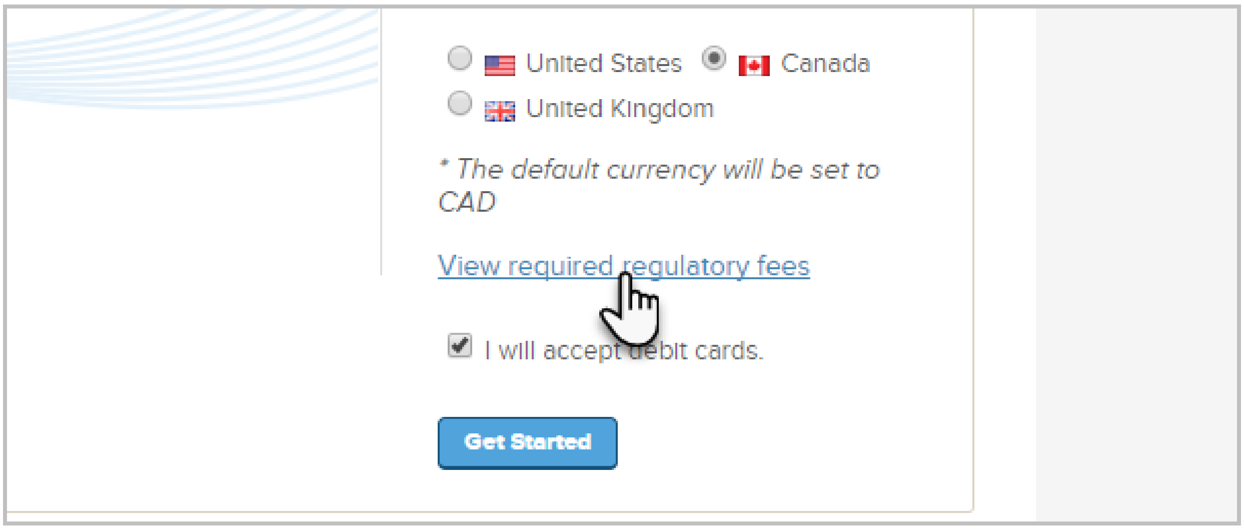
1. Navigate to E-Commerce Setup from the Infusionsoft main nav
2. Click on Payment Types from the Payment sub menu in the bottom left corner of the screen



3. Click the checkbox to the left of Payments to reveal details for configuring Infusionsoft Payments



4. Click on the Canada radio button, then click on the View Required Regulatory Fees link



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Infusionsoft Community

24/7 Chat Support

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Mon-Fri 6AM - 7PM Arizona

UK Freephone
+ 44 (0)808 258 0093
Mon-Fri 6AM - 7PM Arizona
Mon-Sat 2PM - 3AM London

AUS Free Call
+ 61 1800 730 419
Mon-Fri 6AM - 7PM Arizona
Tue-Sat 11PM - 12PM Sydney

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Webinars

Last Modified on 06/19/2018 10:35 am MST

Navigation A quick 3-minute introduction to navigating Infusionsoft
Manage Contacts Join us to learn the basics of the Infusionsoft CRM. We will show you how to add both a single contact and multiple contacts. We will also introduce you to tags and how we use them to organize your lists.
Email Builder and How to Send a Broadcast Our templates are a great starting point to help you create your branded email inside of Infusionsoft. We make it easy to start communicating with your prospects and customers. Join us to learn how to send your first broadcast to a targeted group or your entire contact list! It's easy and fun too!
Campaign Builder Basic Training Automation is the magic of Infusionsoft. Join us to learn how to use our amazing Campaign Builder to automate your follow up. This webinar will introduce you to the tools to build a simple campaign and start seeing the automation magic in action.

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Beginner

Last Modified on 06/18/2018 4:12 pm MST

CRM

Last Modified on 10/01/2018 2:57 pm MST

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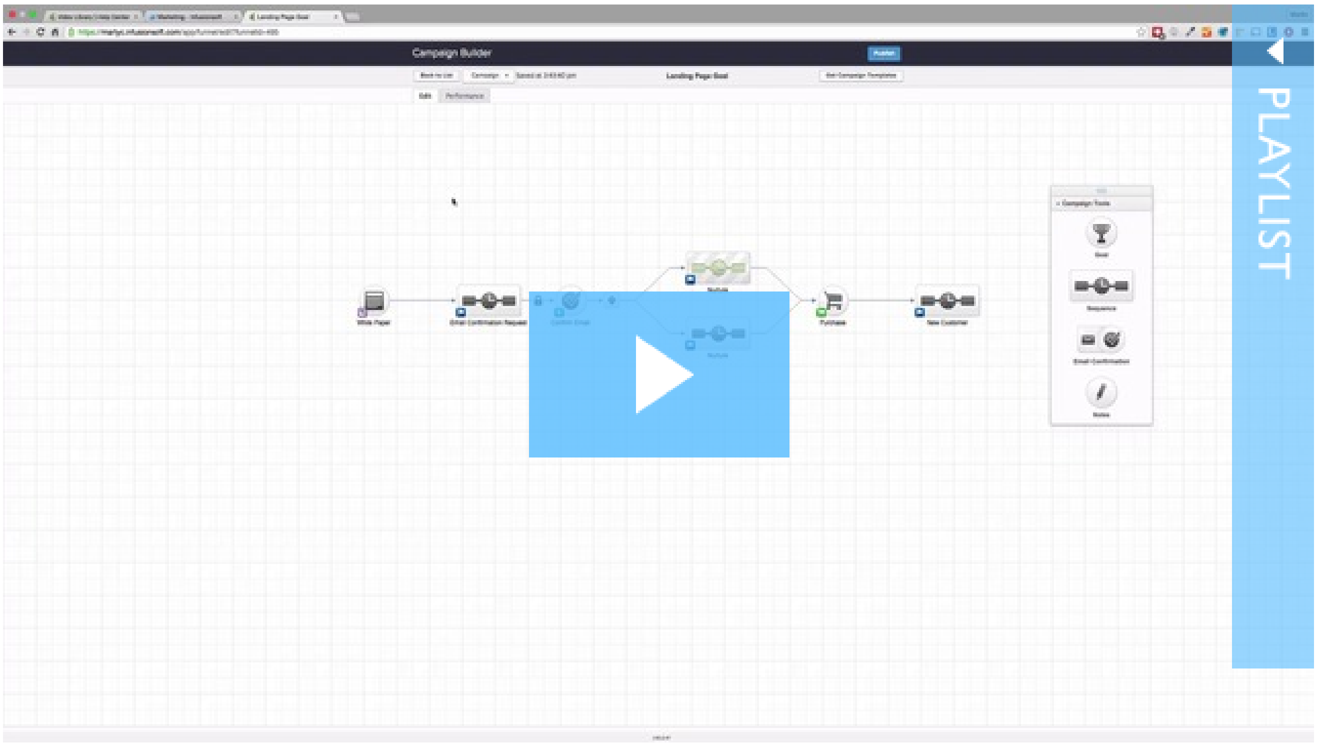
Marketing

Last Modified on 06/14/2018 2:26 pm MST



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E-Commerce

Last Modified on 06/14/2018 3:20 pm MST

Using a different version of Infusionsoft? Click Here to learn more

Referral Partner

Last Modified on 06/14/2018 3:35 pm MST

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Sales Team

Last Modified on 06/14/2018 3:55 pm MST

Looping Campaigns

Last Modified on 07/18/2018 1:22 pm MST

Publish Date: 2/18/2016

This week's Mastermind call will be presented by Tara Roberts. The topic is Looping campaigns for continuous follow up. Campaign loops are super helpful for tasks or communications that need to go out on a recurring basis, like birthday emails.

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DKIM, SPF & Open QA

Last Modified on 07/18/2018 3:24 pm MST

Publish Date: 12/15/2016

Simple Event Management

Last Modified on 07/18/2018 3:24 pm MST

Publish Date: 12/02/2016

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The Website Tracking Goal

Last Modified on 07/18/2018 3:25 pm MST

Publish Date: 1/5/2017

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Subscription Management with Greg Jenkins

Last Modified on 07/18/2018 1:32 pm MST

Publish Date: 11/10/2016

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Thank You Page Ninja Tricks

Last Modified on 07/18/2018 1:35 pm MST

Publish Date: 2/18/2016

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The Ultimate Customer Satisfaction Campaign

Last Modified on 07/18/2018 1:57 pm MST

Publish Date: 12/22/2016

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How To Use Custom Fields

Last Modified on 07/18/2018 2:00 pm MST

Publish Date: 2/9/2017

Subject Lines and Open Rates

Last Modified on 07/18/2018 2:02 pm MST

Publish Date: 2/16/2017

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Facebook Lead Ads and Infusionsoft

Last Modified on 07/18/2018 2:04 pm MST

Publish Date: 11/10/2016

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Lifetime Customer Value Tracking

Last Modified on 07/18/2018 2:05 pm MST

Publish Date: 10/13/2016

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Why Everyone Needs A Membership Site

Last Modified on 07/18/2018 2:07 pm MST

Publish Date: 9/29/2016

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Combating Web Form Spam

Last Modified on 07/18/2018 2:08 pm MST

Publish Date: 10/27/2016

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The Perfect Customer Lifecycle

Last Modified on 07/18/2018 2:10 pm MST

Publish Date: 9/8/2016

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Flash Sale Quick Launch

Last Modified on 07/18/2018 2:13 pm MST

Publish Date: 9/1/2016

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Sales and Marketing Assessment

Last Modified on 07/18/2018 2:14 pm MST

Publish Date: 7/1/2016

Simple Sales Pipeline

Last Modified on 07/18/2018 2:16 pm MST

Publish Date: 8/11/2016

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Janette Gleason's Marketing Blueprint

Last Modified on 07/18/2018 2:17 pm MST

Publish Date: 8/18/2016

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Order Form Customization

Last Modified on 07/18/2018 2:21 pm MST

Publish Date: 8/26/2016

Referral Partner Programs

Last Modified on 07/18/2018 2:22 pm MST

Publish Date: 8/4/2016

Designing Your New Customer Experience

Last Modified on 07/18/2018 2:30 pm MST

Publish Date: 7/28/2016

Copywriting 101

Last Modified on 07/18/2018 2:32 pm MST

Publish Date: 7/23/2016

Email Deliverability and DMARC Changes

Last Modified on 07/18/2018 2:34 pm MST

Publish Date: 6/23/2016

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The Formula to Identify Your Hottest Leads

Last Modified on 07/18/2018 2:36 pm MST

Publish Date: 6/2/2016

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Automate YOUR Processes

Last Modified on 10/02/2018 2:54 pm MST

Publish Date: 6/17/2016

We have updated the Campaign builder since recording this Webinar, meaning certain parts of the Campaign builder may look different, but the workflow process and information shared is still valid.

Go to 1:57 to skip the Webinar intro

5 Ways to Sell Online

Last Modified on 07/18/2018 2:39 pm MST

Publish Date: 6/9/2016

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Lead Sources - Maximizing your Marketing

Last Modified on 07/18/2018 2:41 pm MST

Publish Date: 5/27/2016

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Using the API for your business

Last Modified on 07/18/2018 2:42 pm MST

Publish Date: 5/20/2016

Defining and Speaking to YOUR Target Market

Last Modified on 07/18/2018 2:45 pm MST

Publish Date: 5/12/2016

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The "Laws" of Sales and Marketing

Last Modified on 07/18/2018 2:48 pm MST

Publish Date: 5/5/2016

The "Lean Campaign" Process - How to build and launch campaigns fast!

Last Modified on 07/18/2018 2:50 pm MST

Publish Date: 4/28/2016

Turning a Paid Trial into a Subscription

Last Modified on 07/18/2018 2:52 pm MST

Publish Date: 3/10/2016

On this Infusionsoft Mastermind, Russ will be showing a couple methods on how to turn a shopping cart trial purchase into a subscription! This will allow you to sell your customer's a trial to a subscription, and have the system start their monthly subscription later, billing the most recent card on file!

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Creating a One-Click Upsell

Last Modified on 07/18/2018 2:55 pm MST

Publish Date: 3/24/2016

During this edition of the Infusionsoft Mastermind Webinar, Ethan will be going over how to create a one-click upsell using action sets and the campaign builder. A one click upsell is a great way to turn $10 into $30. By giving your customers an easy way to purchase more of your wonderful products you can increase your sales in an automated fashion!

Multi-step Web Forms with Reminders

Last Modified on 07/18/2018 2:59 pm MST

Publish Date: 2/11/2016

This week on the Infusionsoft Mastermind Webinar, Russ will dig into creating a multi-step web form campaign, with built-in reminders for contacts who might have not completed all the steps. Multi-step web-forms are convenient for when you might need a little more information from your contacts, but don't want to put all the form fields on one long web form! With the a Multi-Step web form campaign, Infusionsoft can track your contact's progress, and send out a reminder, linking the contact right back to the page they left off at, so they can finish their form submission! Russ will go over how you can link your web forms together to form a multi-step form, and the campaign that will work behind the scenes to track your submissions!

Deck the Halls with Automated Holiday Mailings

Last Modified on 07/18/2018 3:01 pm MST

Publish Date: 12/10/2015

This week on the Infusionsoft Mastermind Webinar, we will be creating an automated, major holiday mailings campaign. In this edition, I will show how you can set up a simple, organized, major holiday mailing campaign that you can funnel your lists into not only now, but throughout the year, as you grab more leads! The great thing about a campaign like this is you can utilize it for more than just holidays! As usual, I will cover some maintenance tips for this style of campaign, and answer your questions!

2016 New Customer Welcome & Wow Campaign

Last Modified on 09/07/2018 12:32 pm MST

Publish Date: 1/7/2016

Happy New Year and welcome back to the Infusionsoft Mastermind Webinar! This week Russ will be going over how to set up and configure a nice New Customer Welcome & Wow campaign! We will discuss how you can configure this campaign to kick off for only new customers and not any of your current customers! Wowing your new customers is a great key to repeat business. You may be familiar with the free New Customer Welcome & Wow in your marketplace, and asked yourself, “How can I only trigger this campaign to run for new customers and not my existing customers” Russ will cover this, and more on our first Mastermind Webinar of 2016! As always, we will be taking your questions, too!

Campaign Tips & Tricks: Internal Use Edition

Last Modified on 07/18/2018 3:23 pm MST

Publish Date: 12/3/2015

This week on the Mastermind Webinar, Russ will be digging into an 'Internal use' campaign, that will let you give reps the ability to enter contact information into the system via a web form! We will also be looking into how you can set emails in this campaign to be delivered with the entered contact's information to other internal reps! This style of campaign is popular with businesses that have larger teams of reps that gather and enter leads! With this campaign, you can set your team up with the ability to get information into Infusionsoft, without having to log-in! Great for working on the go!

Dynamic Email Marketing

Last Modified on 07/30/2018 3:29 pm MST

Download Slide Deck

DOWNLOAD "The Evolution of a Marketing Campaign" PDF

Asia Pacific Countries (APAC)

Last Modified on 07/27/2018 7:55 am MST

Australia	Laos
Bangladesh	Malaysia
Cambodia	Micronesia
China	Myanmar
Fiji	New Zealand
French Polynesia	Pakistan
Guam	Singapore
Hong Kong	Taiwan
India	Thailand
Japan	Vietnam
Korea - South Korea	