Table of Contents

Getting Started	. 3
I'm New and Just Want to Learn the Basics	. 3
All Help Articles	. 8
Contacts	. 8
Create and Manage Contacts	. 8
Marketing	. 8
Campaigns	. 8
Campaign Builder Basics	. 8

I'm New and Just Want to Learn the Basics

Last Modified on 01/29/2018 7:03 pm MST

Before you start...

If you have questions about how to use Infusionsoft, check this Help Center first for an answer. The Help Center has the most accurate information available about Infusionsoft. At the bottom of each article please let us know if it was helpful and feel free to leave us feedback so we understand why it was or wasn't helpful to you.

Sign in to Infusionsoft

After you set up your Infusionsoft ID, go to signin.infusionsoft.com to sign in. Note that if you already have an Infusionsoft ID from another Infusionsoft account, you can sign in with an existing one....

Watch these quick introductory videos

Navigate Infusionsoft

Campaign Builder Overview

Email Builder Overview

Landing Page Builder Overview

Customize your email signature

Learn how to customize your email signature for outbound emails.

Signature image	Remove	
Jse the other field n this email signa Signature Preview	ds on this page to modify the information that appears ture /	
Martin Cash Assistant to the Regional Manager Business: (480) 555-5555 martinc@infusionsoft.com		

Add a contact record

There are several ways to manually and automatically add a contact record in Infusionsoft. The most basic way is to Just click the + button at the top of the page to add a new contact record manually.

	+ © ★ ≈ ± e ⊂ +
	Add a Contact
	First Name Last Name
	Email
σ×	Busin Phone Ext

Search and tag contacts

Click here to learn how to do search and tag contacts in Infusionsoft

Contacts 🗸	Companies 🗸	Opportunities 🗸	Referral Partners 🐱	Visitors		
Stevensor	ntacts					
Actions •	Actions Start over Edit Criteria/Columns Save Print					
	1-20 of 128	- (h)	1 2 3 4 5	6 7 >		
		AA				
	Email: blah@adsfas	df.com	Sta	te (Shipping):		

Download a campaign

Click here to access our online Strategy Guide to download the perfect campaign for your business.

Customize your Home Page Dashboard

Learn how to customize your home page dashboard to show reports and information relevant to you.

	♠ ଓ ★ 鄕 ੈ 8 Q +
	Add Widgets Change Layout
Ø×	Usage Stats

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.

ce	↑ © ★	% 1 0	Q v Find a contact
Orders 🗸 🛛 Products 🗸 A	Tools	Eegacy 🗸	Reports 🗸 Se
April 09, 2015	Basic Training Initial Setup Dashboard		Ac
t be available for a brief period Friday a	My Day Calendar		
	Tasks	σ×	Usage Stats
	Files	0	Logins this week
		0	Contacts that hav

Manage Tasks and Appointments with My Day

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

TASKS New Task	Add	2	1	Ē	D
► OVERDUE		No	otes		
▼ TODAY					
Turn over keys to Anna at We	st 🖁				
▼ SOMEDAY	Turn over keys to	o Anna at W	est Olive St	reet	
Buy Flyers	2				