

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

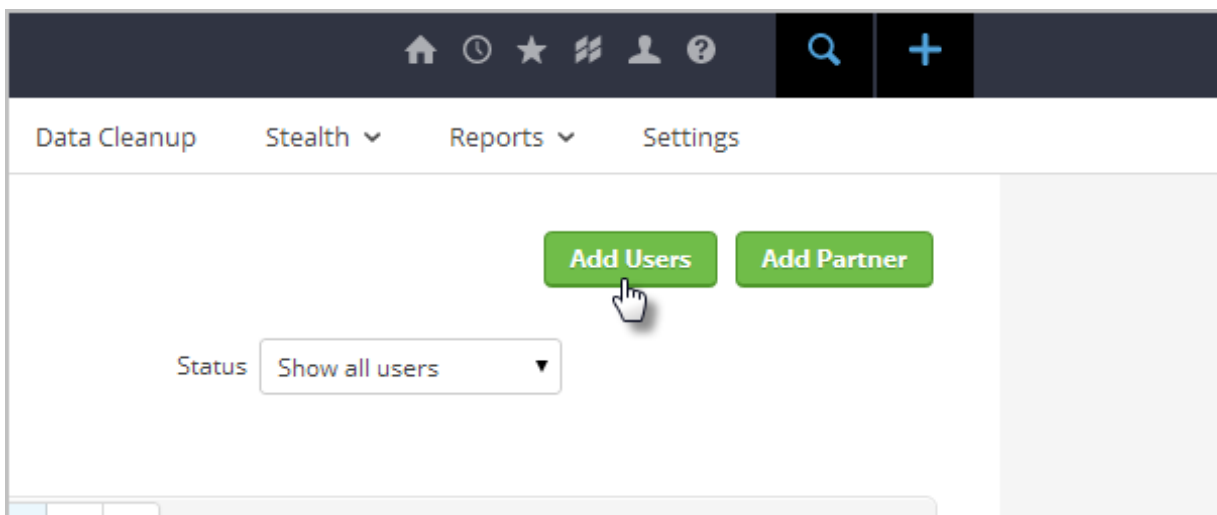
Please note! Most of features described in this article require you to have Admin permissions in Infusionsoft.

## 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).



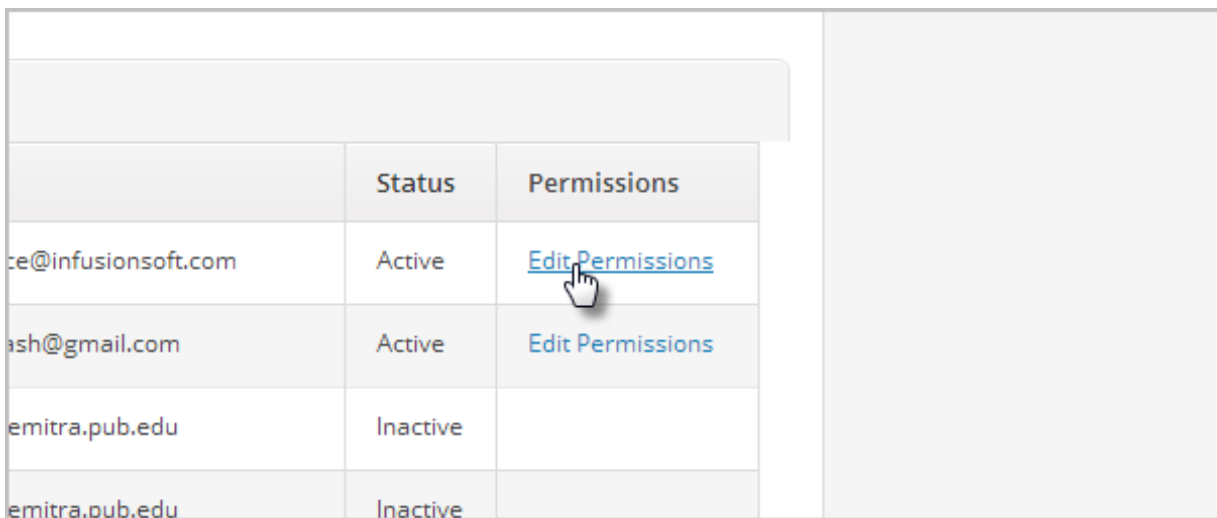
## Set User Permissions

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](#)



	Status	Permissions
ce@infusionsoft.com	Active	<a href="#">Edit Permissions</a>
ash@gmail.com	Active	<a href="#">Edit Permissions</a>
emitra.pub.edu	Inactive	
emitra.pub.edu	Inactive	

## 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](#)

## Import your data into Infusionsoft

Pick what you would like to import and click Go.

Contacts ▼

Go

Or, use one of our import tools for:

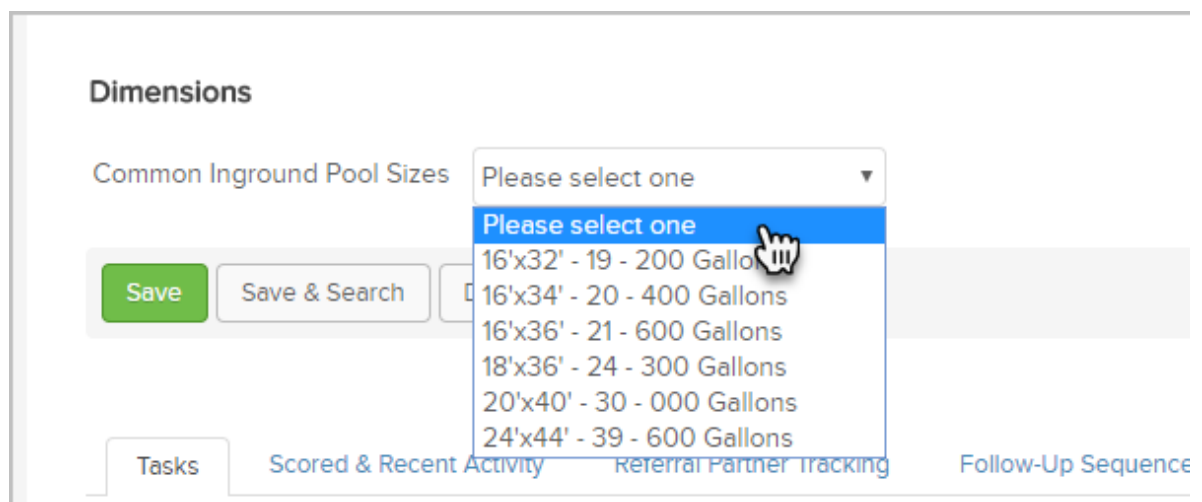
[AWeber™](#)

[Constant Contact™](#)

[iContact™](#)

## 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.




The screenshot shows the 'Dimensions' section of the Infusionsoft interface. It features a dropdown menu titled 'Common Inground Pool Sizes' with the placeholder text 'Please select one'. A mouse cursor is hovering over the dropdown, which has opened to show a list of pool sizes and their corresponding gallon capacities. Below the dropdown are two buttons: 'Save' (green) and 'Save & Search' (grey). At the bottom of the section, there are four tabs: 'Tasks', 'Scored & Recent Activity', 'Referral Partner Tracking', and 'Follow-Up Sequence'.

Pool Size	Gallons
16'x32'	19 - 200 Gallons
16'x34'	20 - 400 Gallons
16'x36'	21 - 600 Gallons
18'x36'	24 - 300 Gallons
20'x40'	30 - 000 Gallons
24'x44'	39 - 600 Gallons

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.

 You can make multiple Tags by separating the names with commas.

Tag Name

banjos, guitars, violins

Category

Please select a category ▼

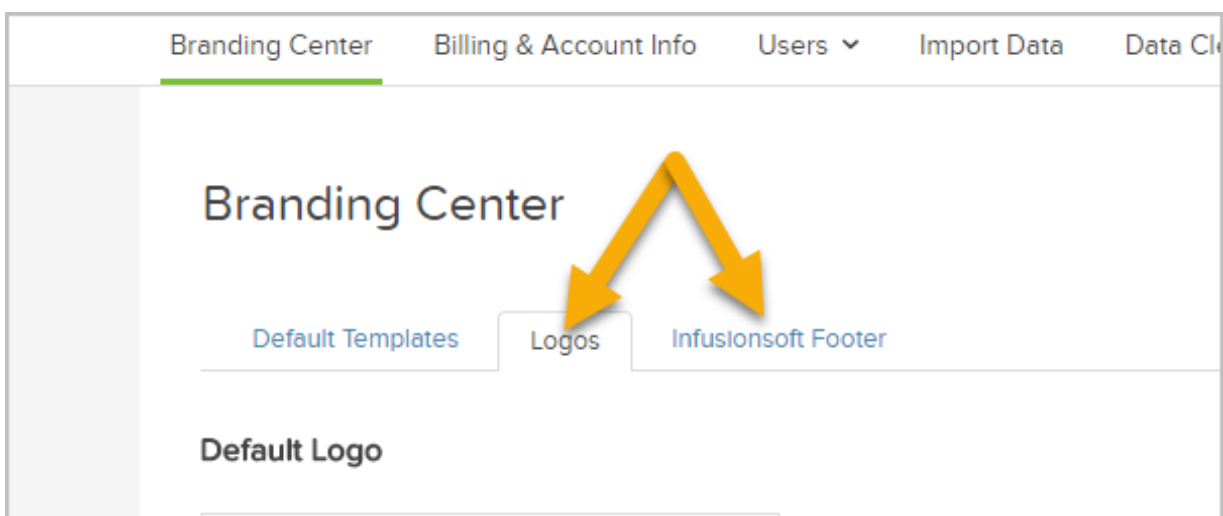
Instruments (Other)

Description

## 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.

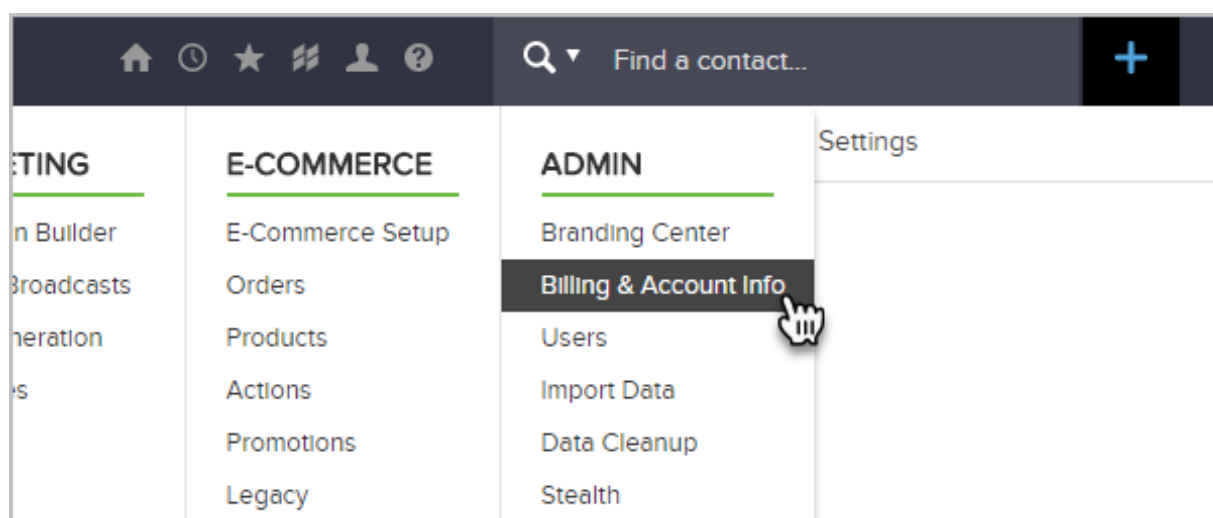


# Improve Email Deliverability with DKIM & DMARC

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](#) .

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