

I'm New and Just Want to Learn the Basics🔗

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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](#) .



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Infusionsoft.

Don't have an account? [Sign Up](#)

✉ Email Address

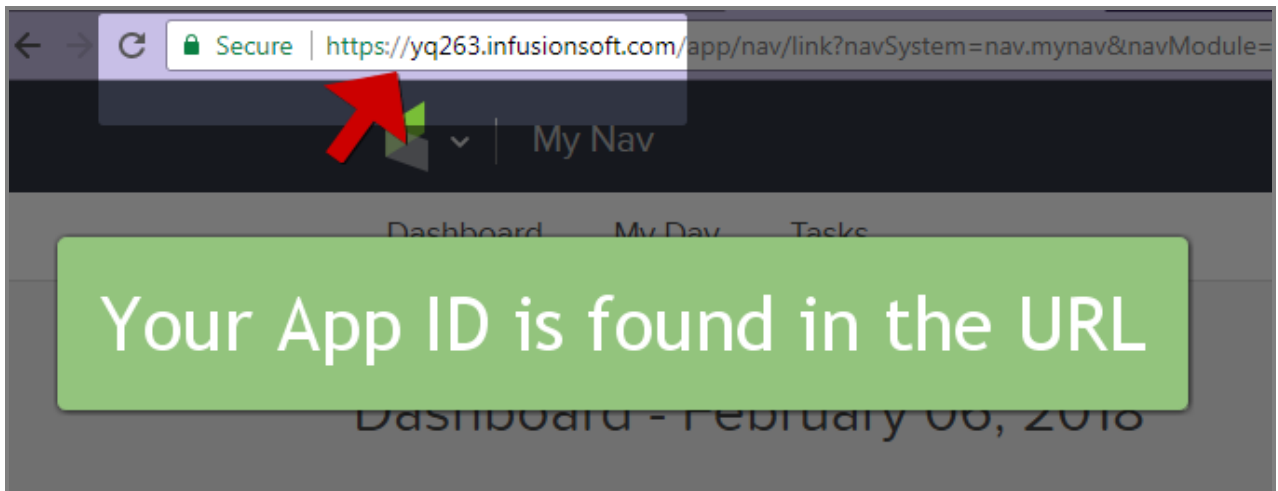
🔒 Password

Log In

[Forgot your password?](#)

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](#) .

Email Signature

Signature Image 

Use the other fields on this page to modify the information that appears in this email signature

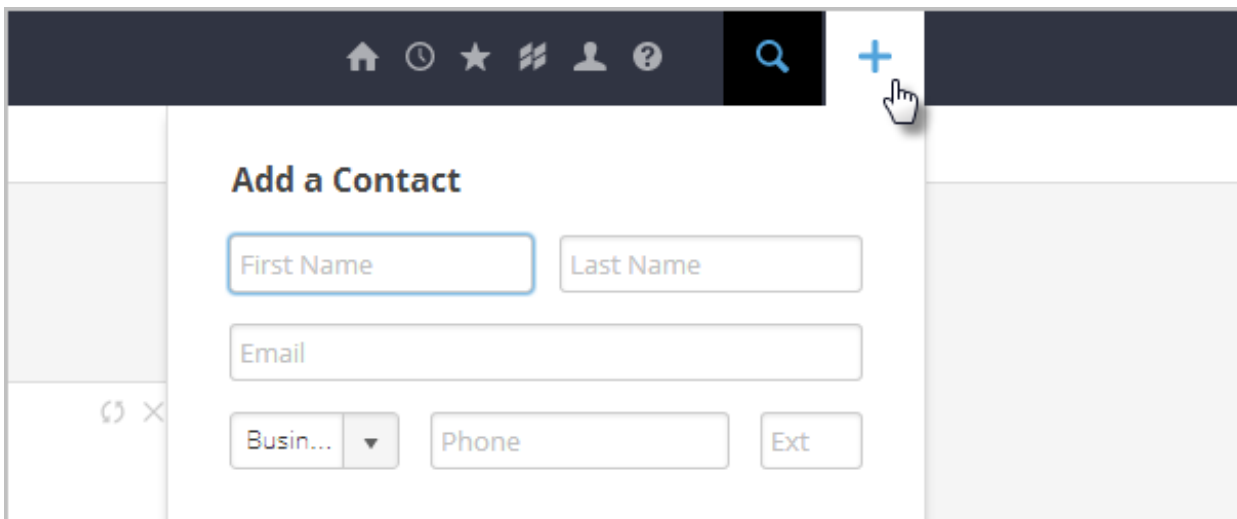
Signature Preview



Martin Cash
Assistant to the Regional Manager
Business: (480) 555-5555
martinc@infusionsoft.com

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.



Add a Contact

First Name Last Name

Email

Busin... Phone Ext

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**.

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< 1 2 3 4 5 6 7 >

No name

Id: 8369
Company Name:
Phone 1:
State:

Email: bayoupc@gmail.com
Contact Id: 8369
Last Updated: 1/15/2018 10:14 AM
Tags:

1

Apply a tag

Happy Birthday Reminders X 2 Apply 3

Tags

close

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.

Job Title

Person Type Please select a person type

Lead Source Choose a lead source

Owner Please select an owner

Billing Address

Street Address 1 123

Street Address 2 123

City 123

State KS

Postal Code 85222

Country United States

Phone / Fax

Phone 1 Business 123

Manage Phone Status...

Phone 2 Business

Fax 1 Business

Email / Social

Email martinecash@gmail.com

Status: Confirmed Manage Email Status...

Website

Twitter

Facebook

LinkedIn

Global Information

Language English (United States)

Time Zone (GMT -07:00) Phoenix

Tags

Manage Tags

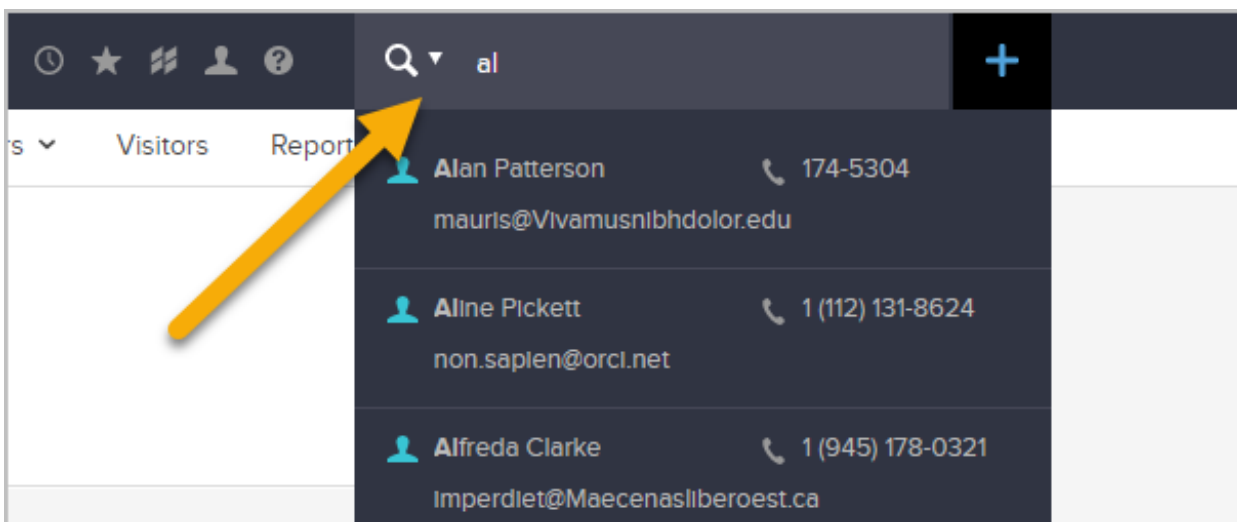
This Contact does not have any Tags

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.

Customer Tags:	Please select a tag ▼	Apply this Tag
CustomerHub:	Please select a tag ▼	Apply this Tag
Email Engagement:	Please select a tag ▼	Apply this Tag
eSubscriptions:	Newsletter ▼	Apply this Tag
Family:	Please select a tag ▼	Apply this Tag
fgh:	Please select a tag ▼	Apply this Tag
Free Items:	Please select a tag ▼	Apply this Tag
Functional:	Please select a tag ▼	Apply this Tag

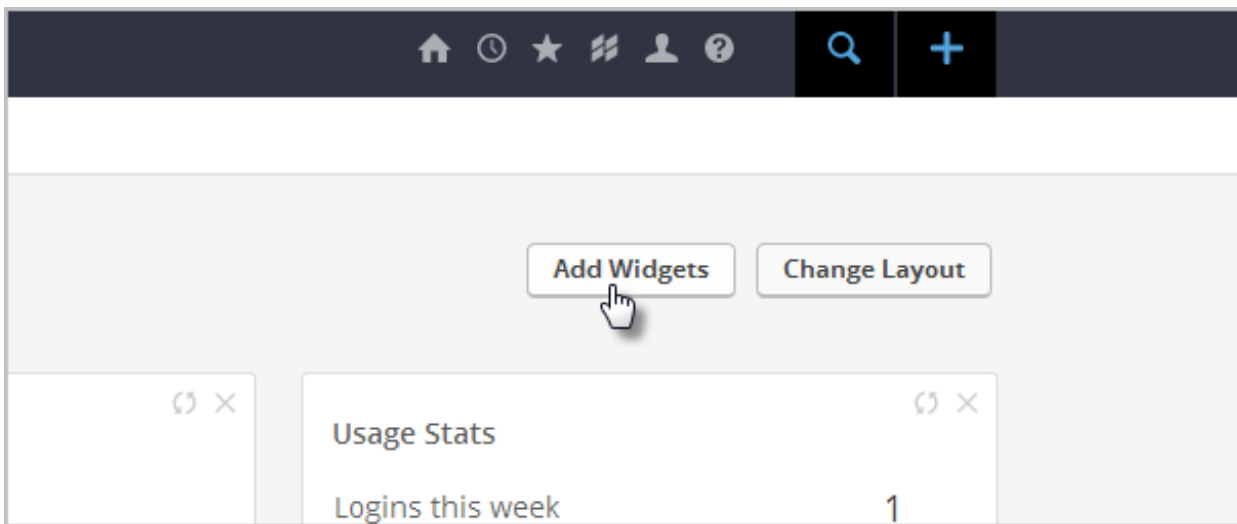
Searching Contacts

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](#).



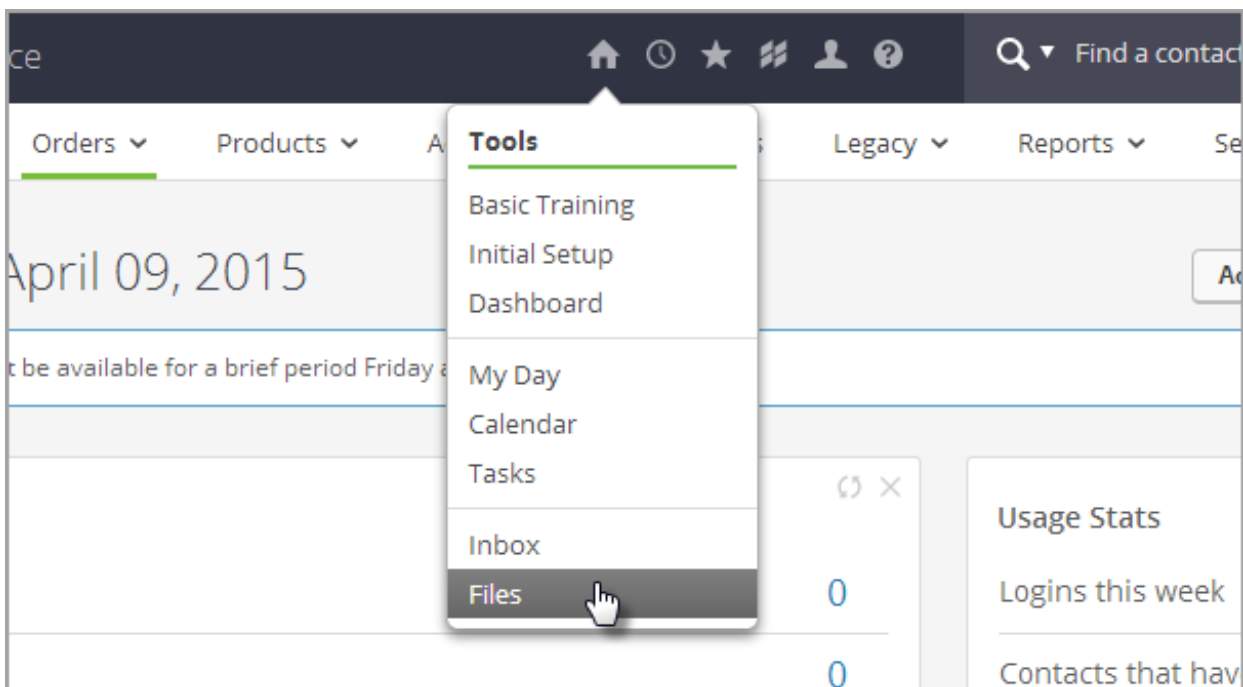
Customize your Home Page Dashboard

Learn how to personalize your home page [Dashboard](#) to show reports and information relevant to you.



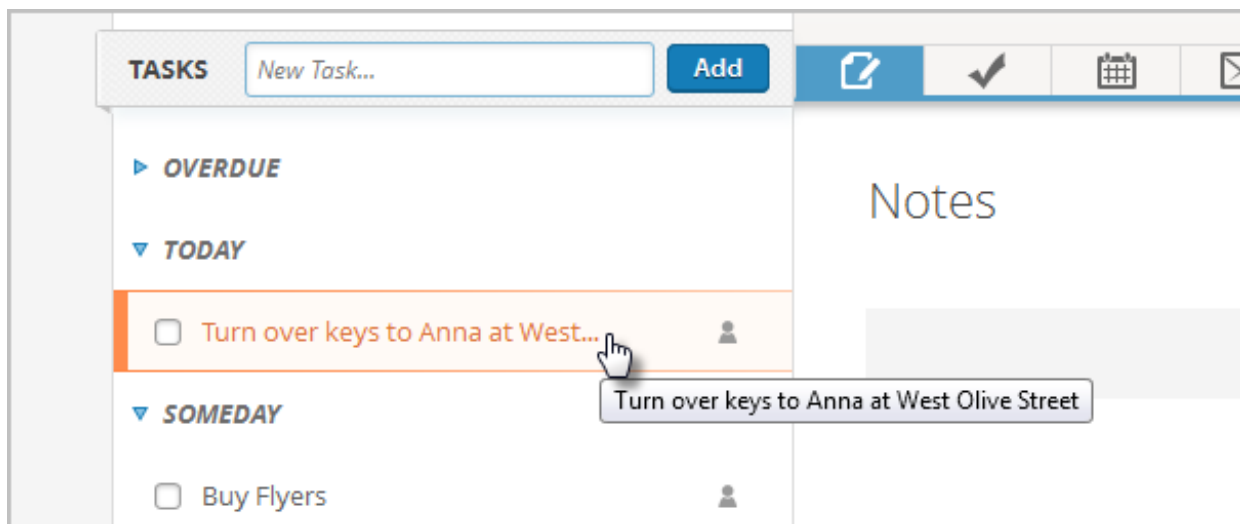
Store files in Infusionsoft

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](#) .
