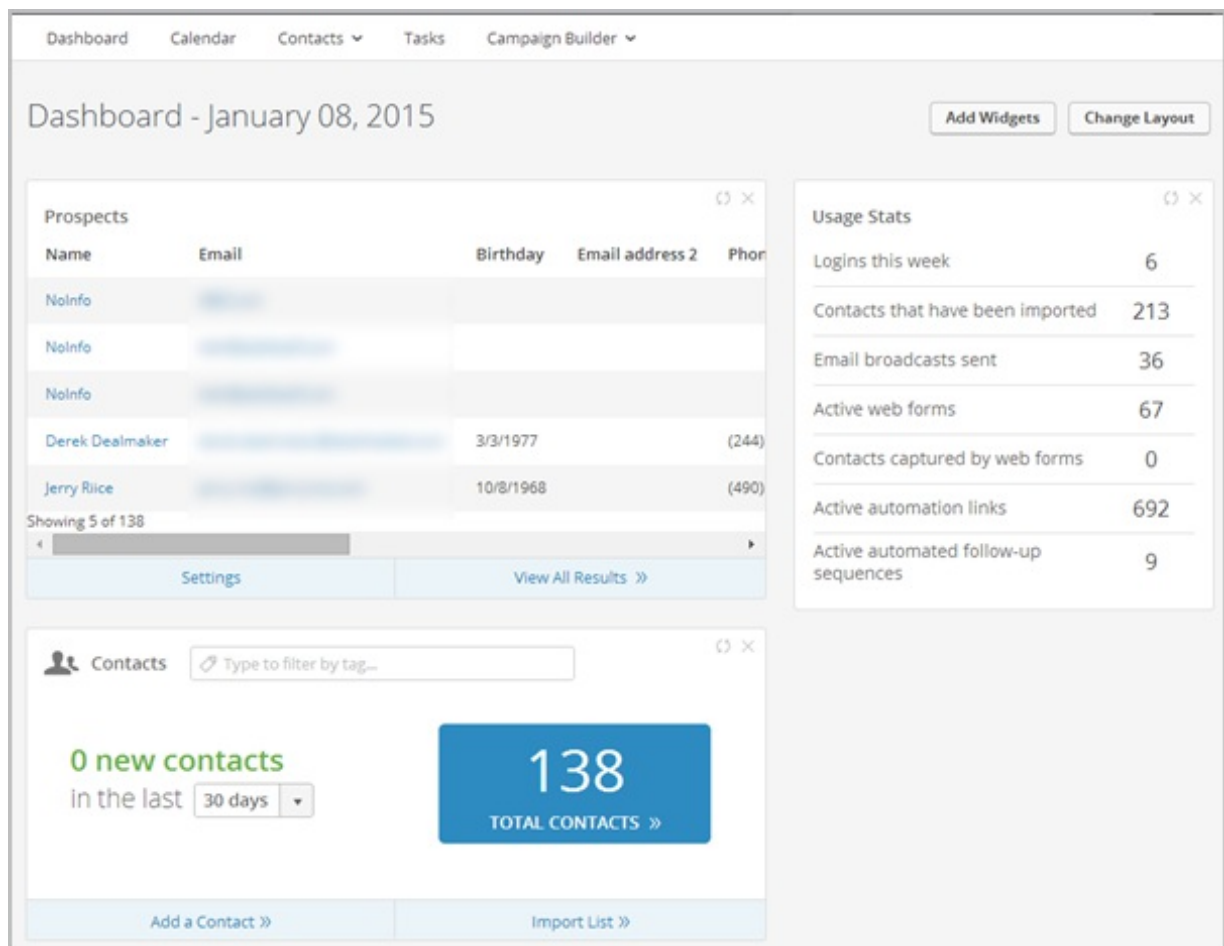


Customize The Home Page Dashboard

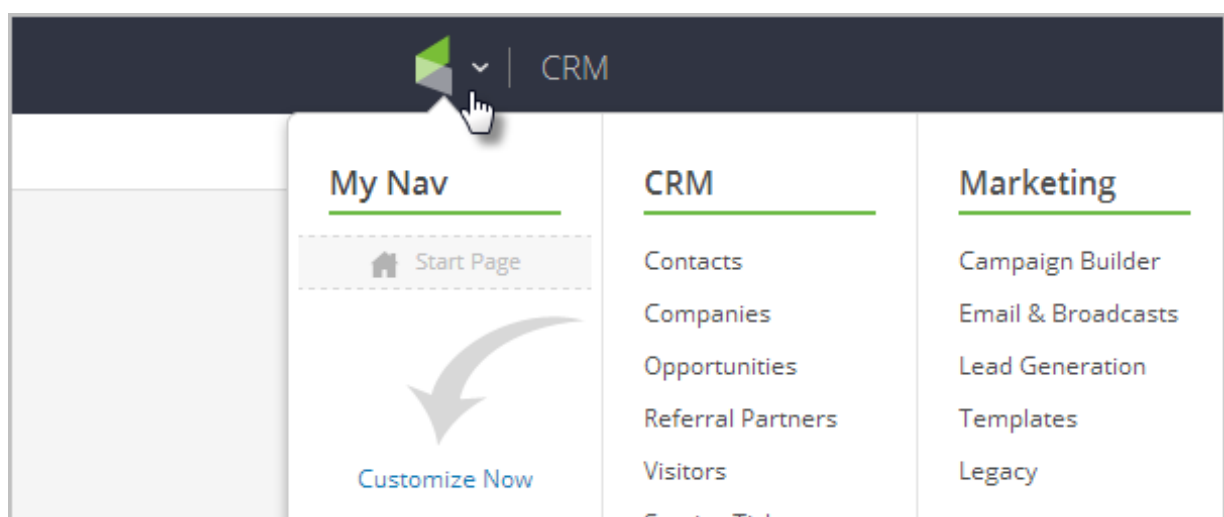
Dashboard

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

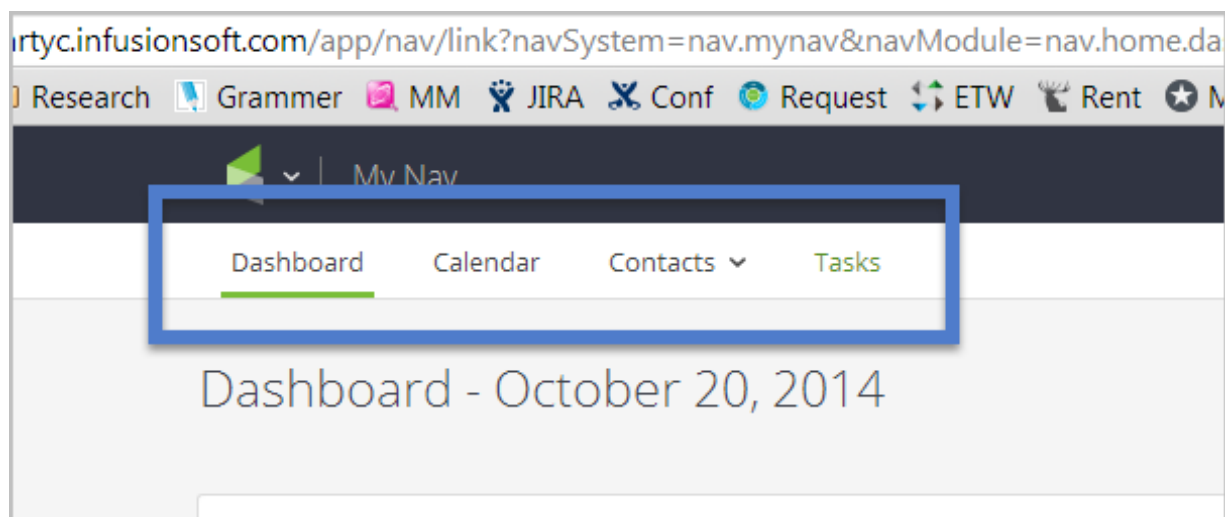
When you hover over the Infusionsoft logo, the main navigation menu is displayed. The main navigation menu is comprised of several columns to help you find something fast. Although most people spend their time in a specific area (e.g. Marketing), the main nav allows you to jump to another area quickly.



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

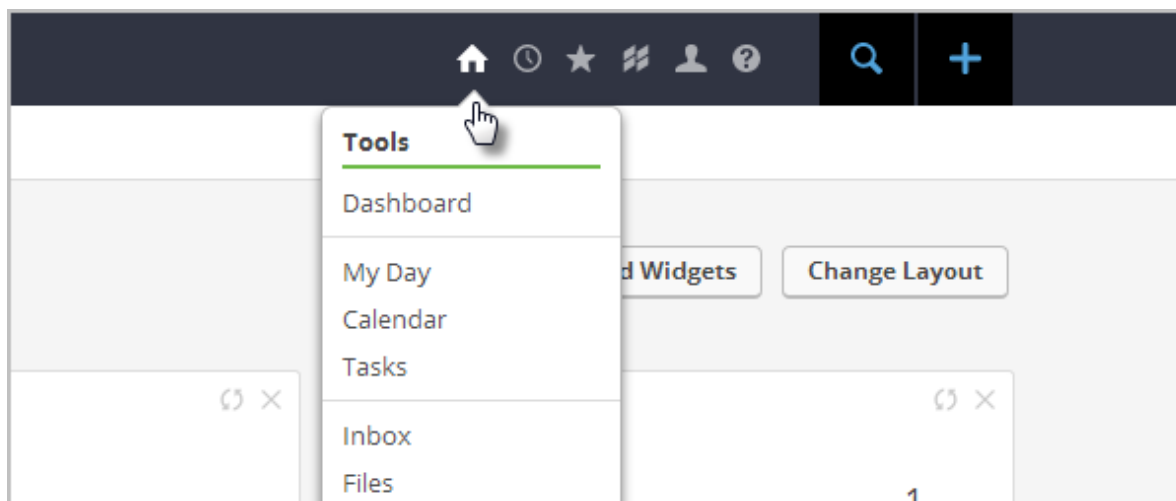
Area Nav

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.

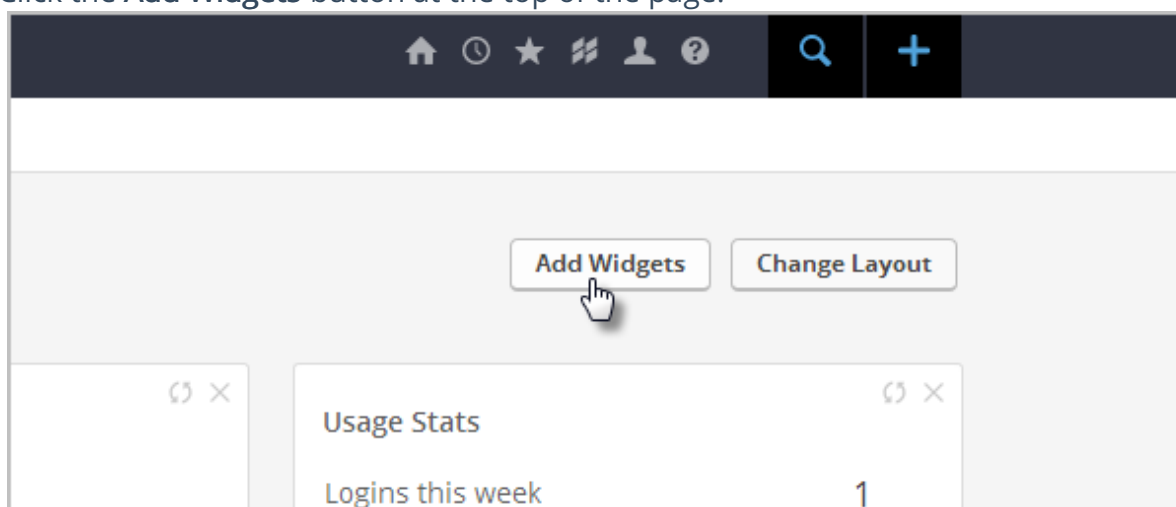


To Add a New Widget

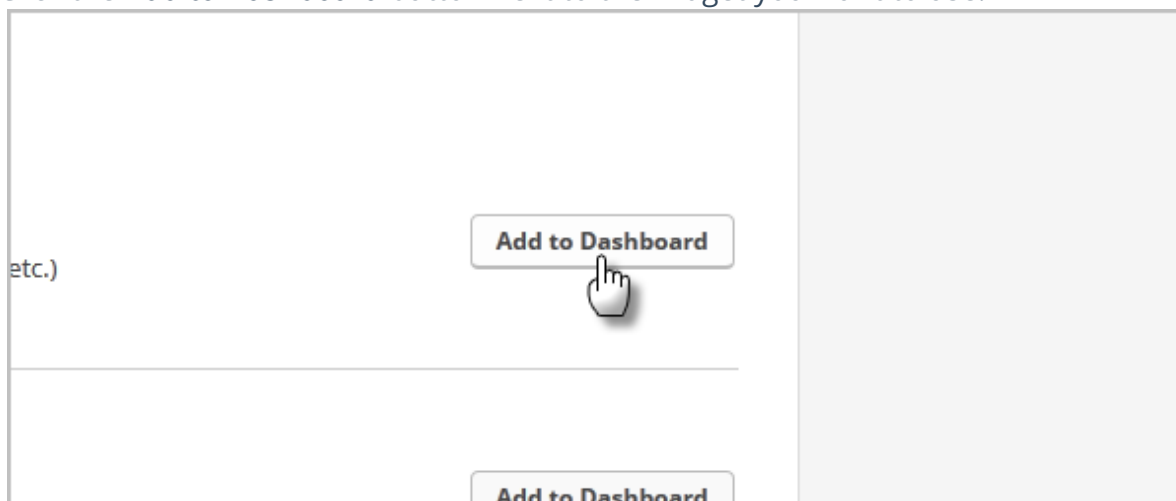
1. Go to the home page dashboard by clicking the **Home** button or by clicking the **Dashboard** link.



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



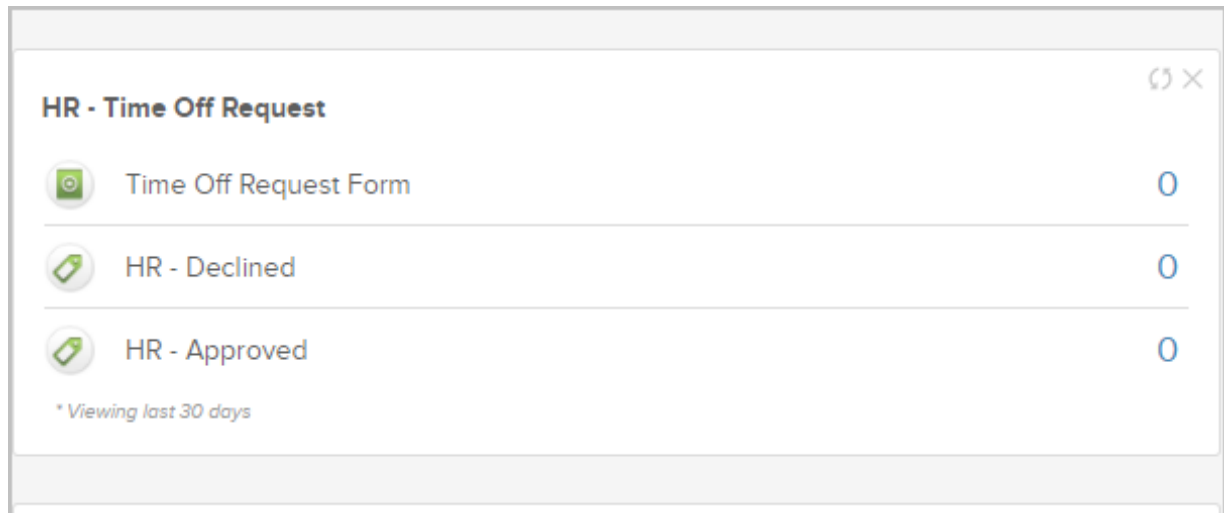
3. Click the **Add to Dashboard** button next to the widget you want to use.








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.

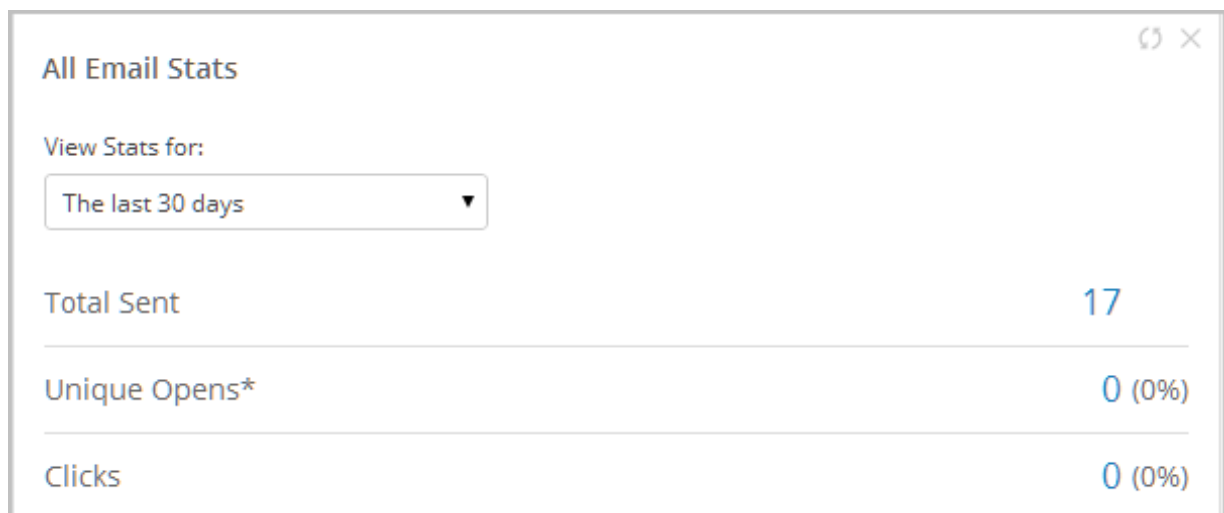


The screenshot shows a widget titled "HR - Time Off Request" with a refresh icon and a close button in the top right corner. Below the title is a table with three rows of statistics. Each row has a small icon on the left, a text label in the middle, and a numerical value on the right. The first row has a green icon with a white circle and the text "Time Off Request Form" with a value of "0". The second row has a green icon with a white checkmark and the text "HR - Declined" with a value of "0". The third row has a green icon with a white checkmark and the text "HR - Approved" with a value of "0". At the bottom of the table, there is a small text note: "* Viewing last 30 days".



HR - Time Off Request			 
	Time Off Request Form	0	
	HR - Declined	0	
	HR - Approved	0	
* Viewing last 30 days			

All Email Stats

This widget displays summary statistics for email activity.

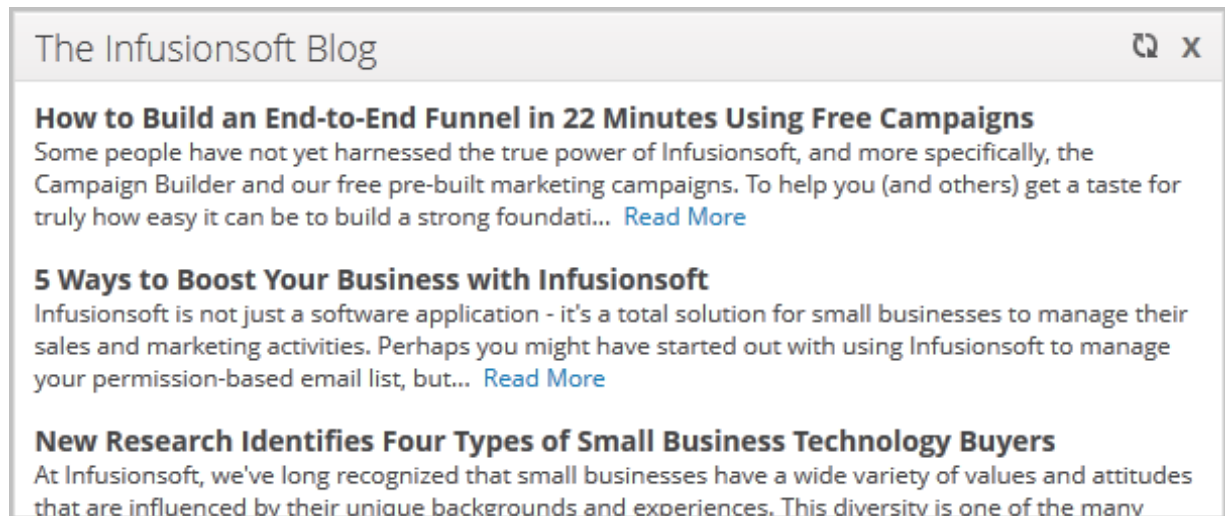


The screenshot shows a widget titled "All Email Stats" with a refresh icon and a close button in the top right corner. Below the title is a section labeled "View Stats for:" followed by a dropdown menu showing "The last 30 days" with a downward arrow. Below this is a table with three rows of statistics. Each row has a text label on the left and a numerical value on the right. The first row has the label "Total Sent" and the value "17". The second row has the label "Unique Opens*" and the value "0 (0%)". The third row has the label "Clicks" and the value "0 (0%)".

All Email Stats		 
View Stats for:		
The last 30 days ▼		
Total Sent		17
Unique Opens*		0 (0%)
Clicks		0 (0%)

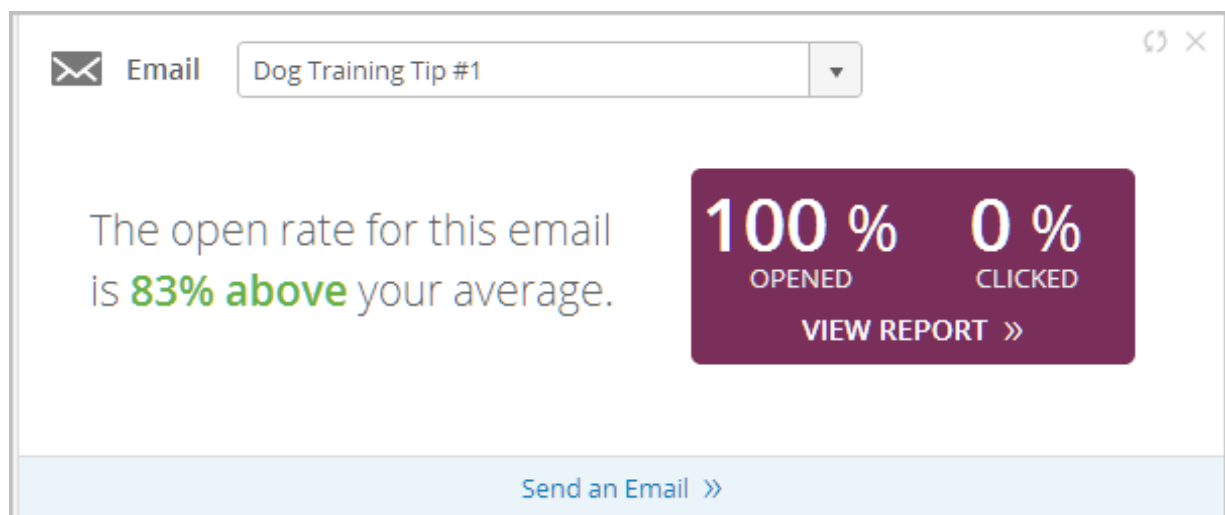
RSS Feed

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.

Calendar Items

View for

Martin Cash

▼

on

04-17-2014

11:30AM - 12:00PM

Ingrid Cruz

Call about Insurance

+ New Appointment

+ New Task

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.

Custom Statistics [Rename](#)

Bought Red Panda

3

Hot Leads

728

Add Another Stat

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.

Pipeline Stages	
New Opportunity	13
Left Message 1	0
Working	11
Closing	1
Won	0

Tasks

Allows quick access your daily tasks directly from your dashboard.



Tasks Today/Past Due				
<input type="checkbox"/>	Due Date	Contact	Description	Priority
<input type="checkbox"/>	04/17/2014	Andrew Tindall	Call about insurance	3. Non-Essential
<input type="button" value="Complete"/>		<input type="button" value="Delete"/>		Showing 1 of 1
+ New Task			View All Results >>	

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.

Usage Stats		 
Logins this week		3
Contacts that have been imported		3359
Email broadcasts sent		53
Active web forms		52
Contacts captured by web forms		0

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.

 **Contacts**

2 new contacts
in the last

30 days ▾

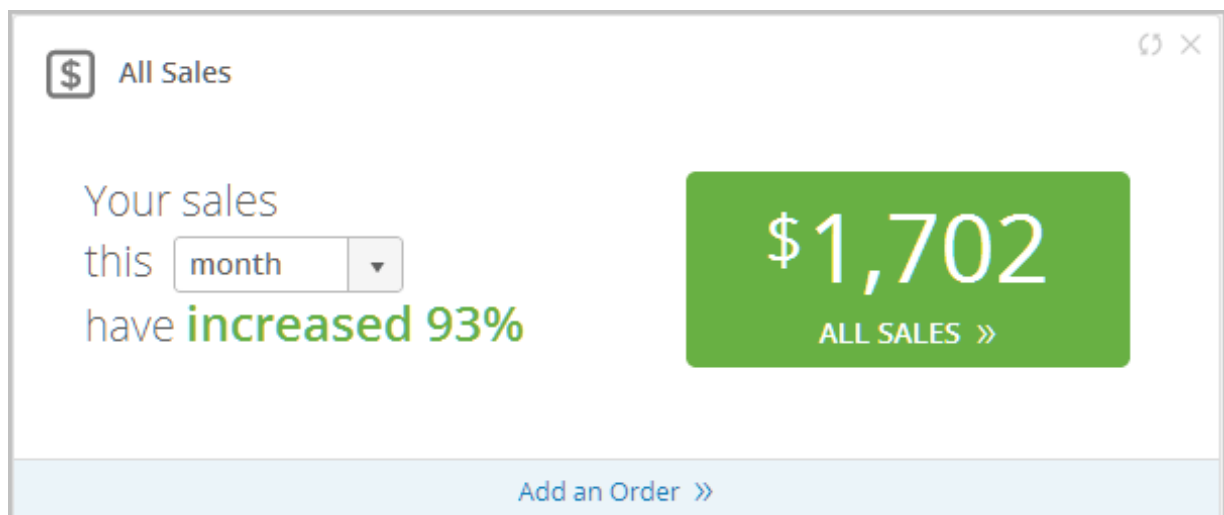
728
TOTAL CONTACTS »

Add a Contact »

Import List »

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.



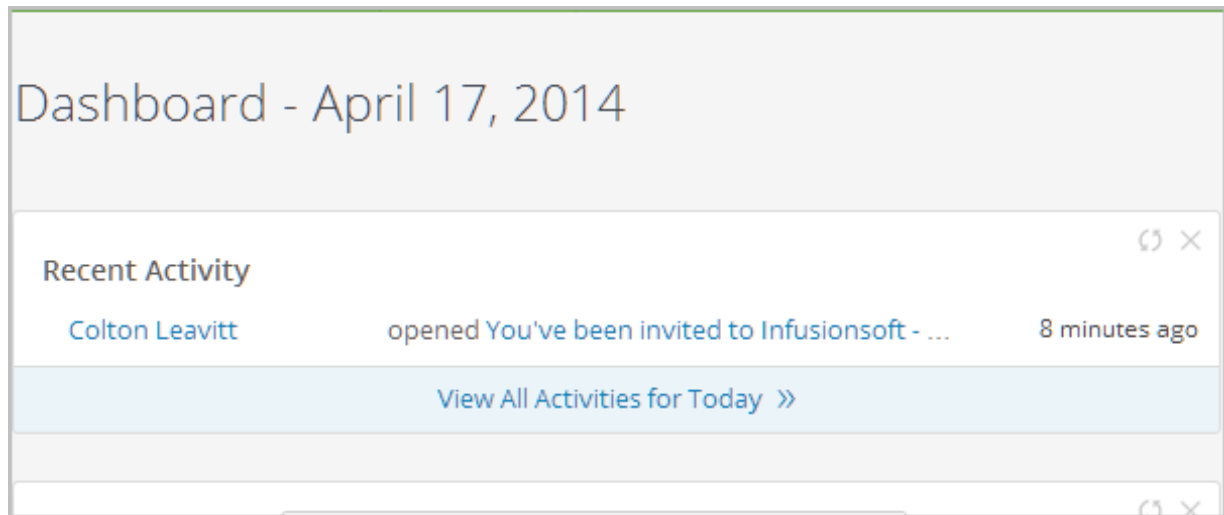
Fulfillment Jobs

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.

Add another stat...				Rename
Fulfillment Jobs				
Type	Status	Name	Count	Process
No results to display				
Recent Activity				
Marty Cash	filled out the web form	Sign up for newsletter	August 7, 2013	

Recent Activity

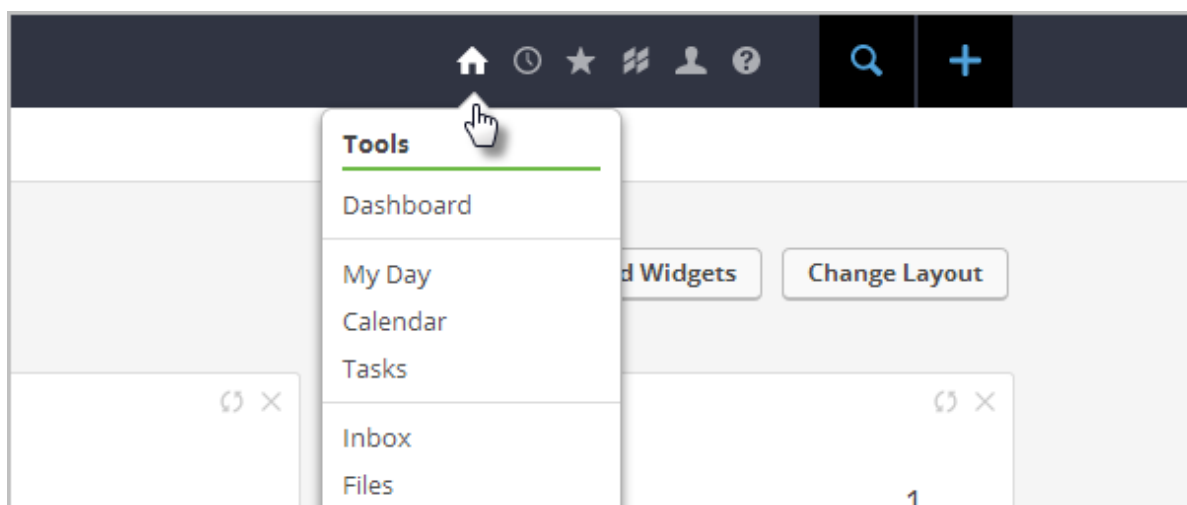
This widget displays a stream of activity, similar to popular social media streams. It will show you when someone fills out a web form, opens an email, clicks a link, and more. Activities are grouped on a per-person basis. Click on the arrow to expand the display to view all activities.



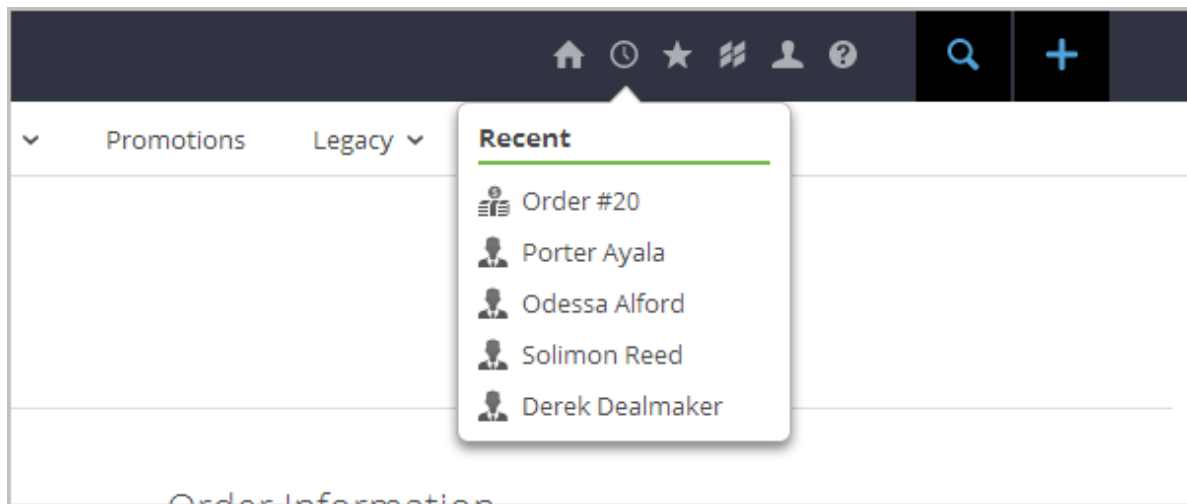
User Toolbar

The user toolbar menu provides access to organization, customization, and information tools.

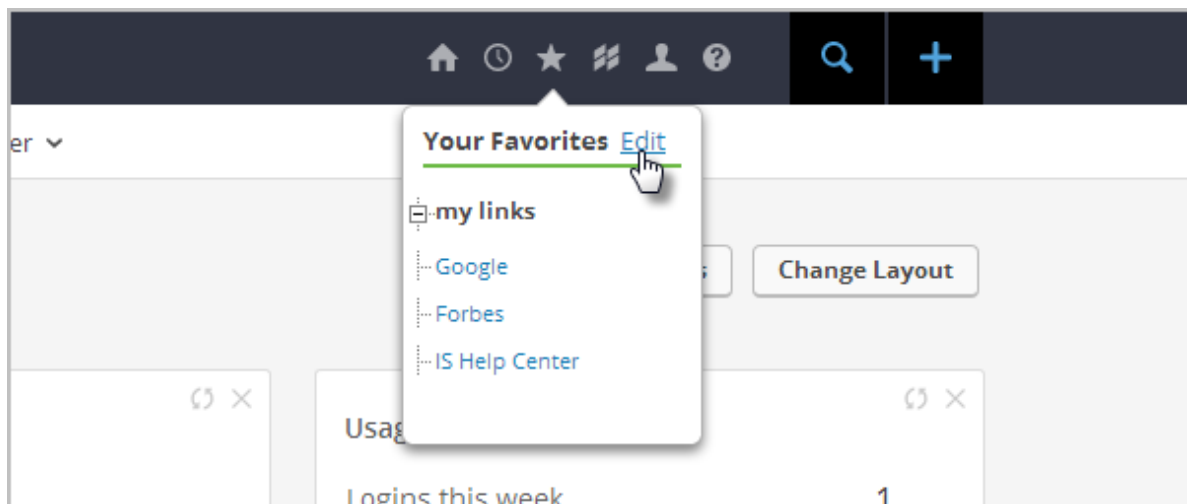
- **Home** - This section gives you access to check email, create and manage tasks and appointments, as well as upload or access company or personal files.



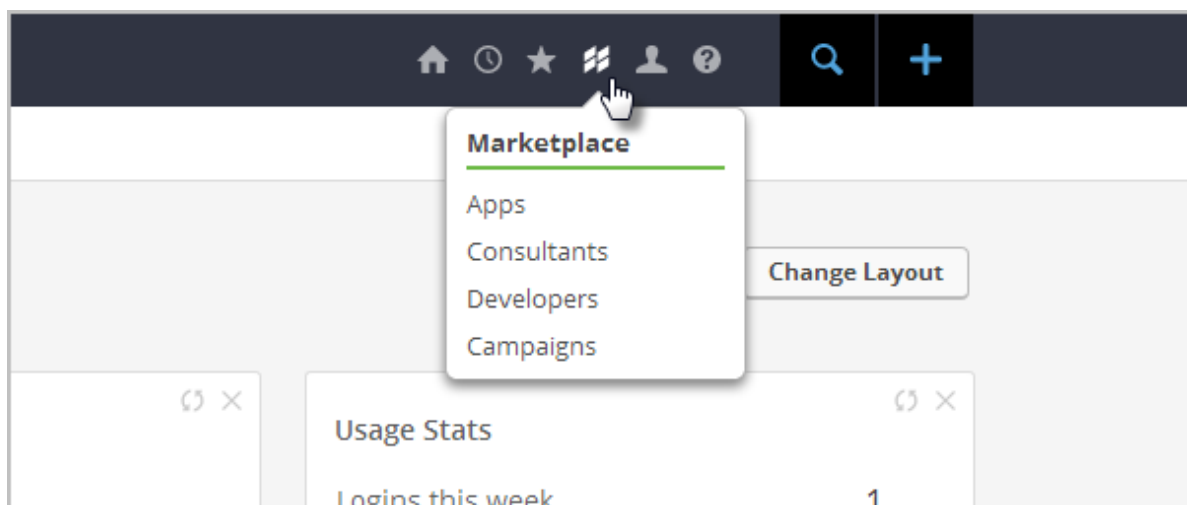
- **Recently Viewed** - This displays a list of the last few pages a user has viewed. It provides a quick way to navigate back to one of them.



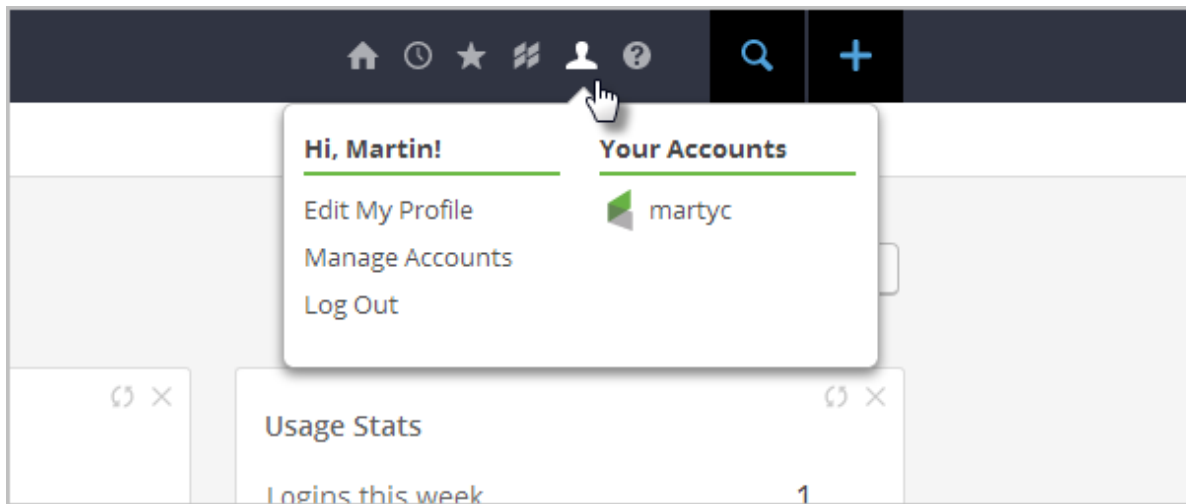
- **My Favorites** - This menu is customizable. Click on Edit to add a link. This is a great way to add links to external websites you frequent throughout the day (e.g. company blog, facebook, or twitter.)



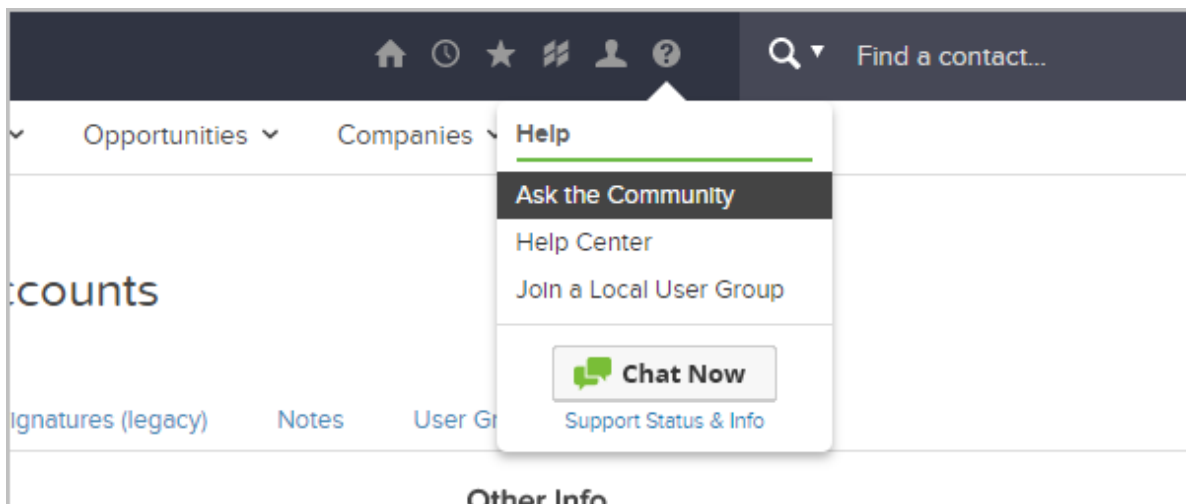
- **Marketplace** - You can download free campaigns, check out various 3rd-party integrations, and connect with a certified Infusionsoft Consultant.



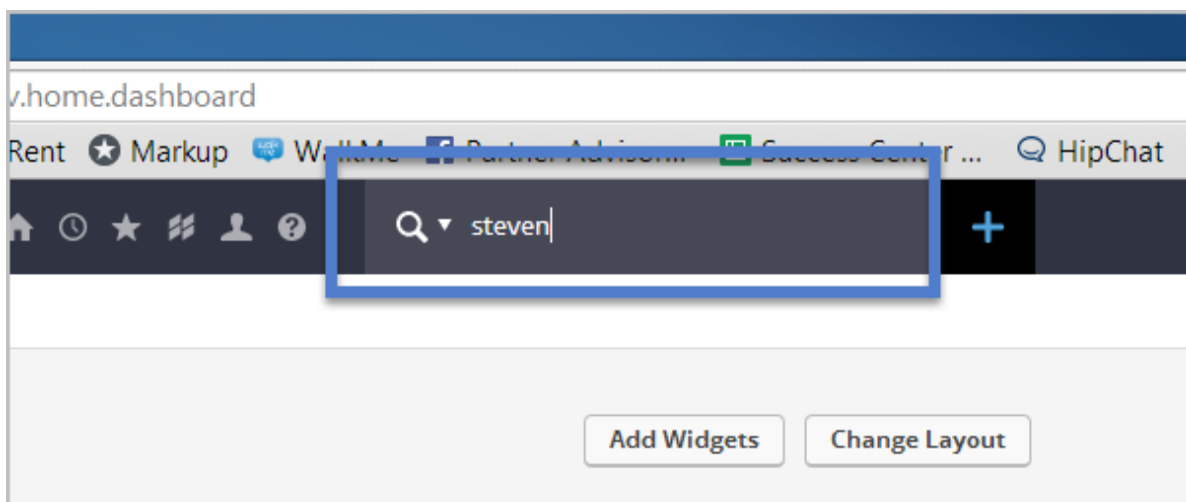
- **My Profile** - This menu gives you access to customize you profile, preferences, and email signature.



- **Help** - Read articles and watch videos in the Help Center. Stuck? Ask questions and participate in the [Infusionsoft Community](#).



- **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.

[illegible]