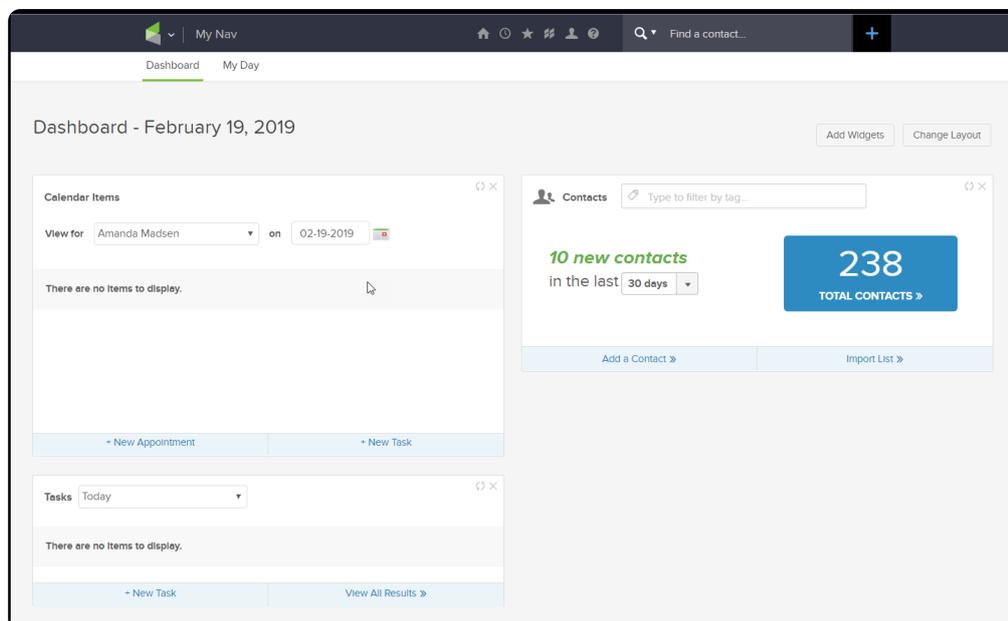


# Learn how to navigate Infusionsoft by Keap

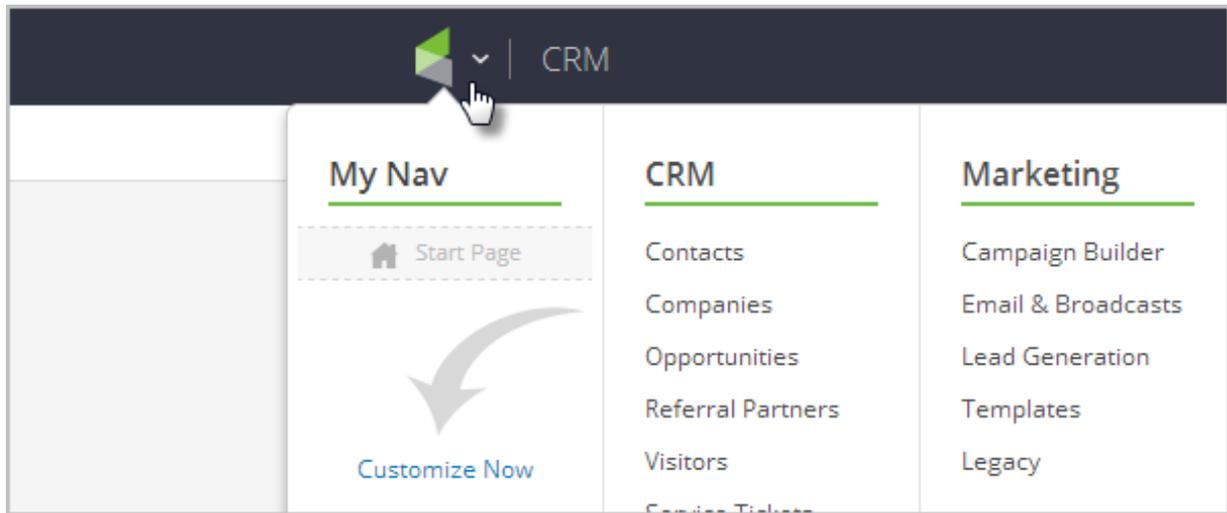
## Dashboard

When you sign into Infusionsoft by Keap, 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

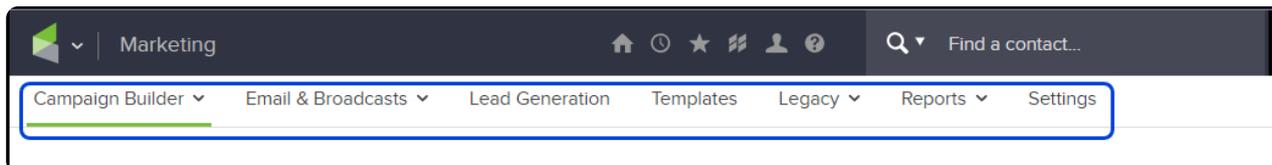
When you hover over the Infusionsoft by Keap logo, the main navigation menu is displayed. The main navigation menu is comprised of several columns to help you find something fast. Although most people spend their time in a specific area (e.g. Marketing), the main nav allows you to jump to another area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



**Pro-Tip!** What columns are displayed is restricted by permissions and the edition of Infusionsoft by Keap.

## 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.



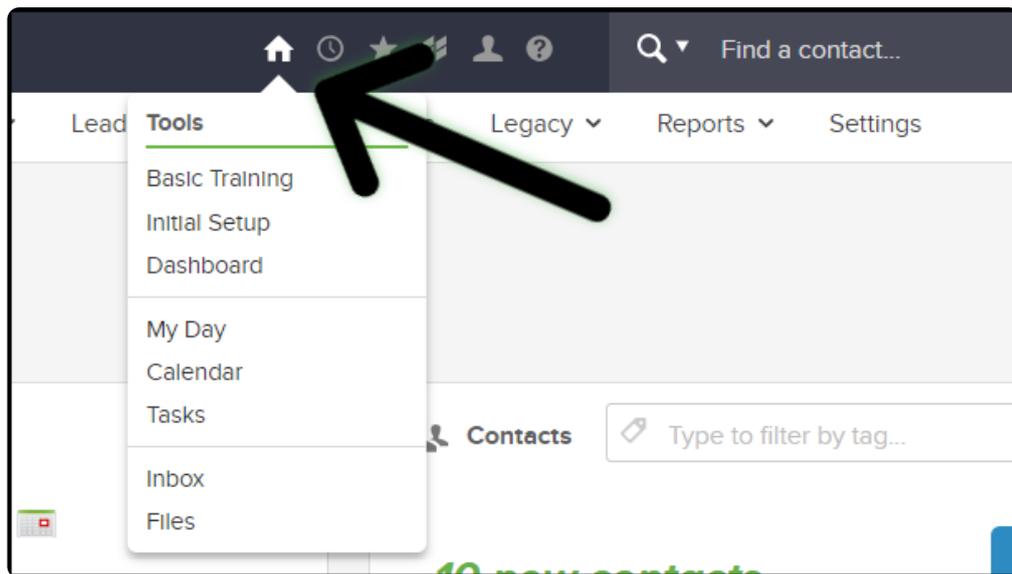
## User toolbar

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

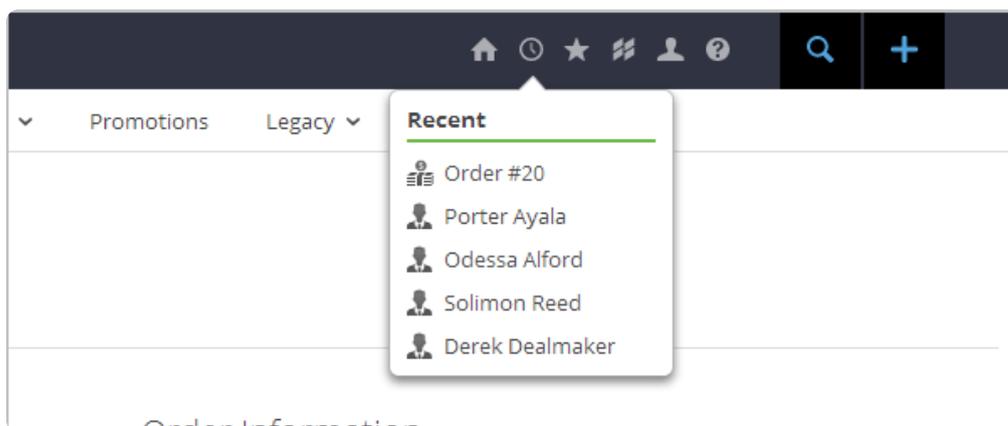
- **Home** - This section gives you access to:
  - **Basic training** - Learn the fundamentals of Infusionsoft by Keap through live webinars, tutorials and videos. Understanding this information will help you

build success with Infusionsoft by Keap.

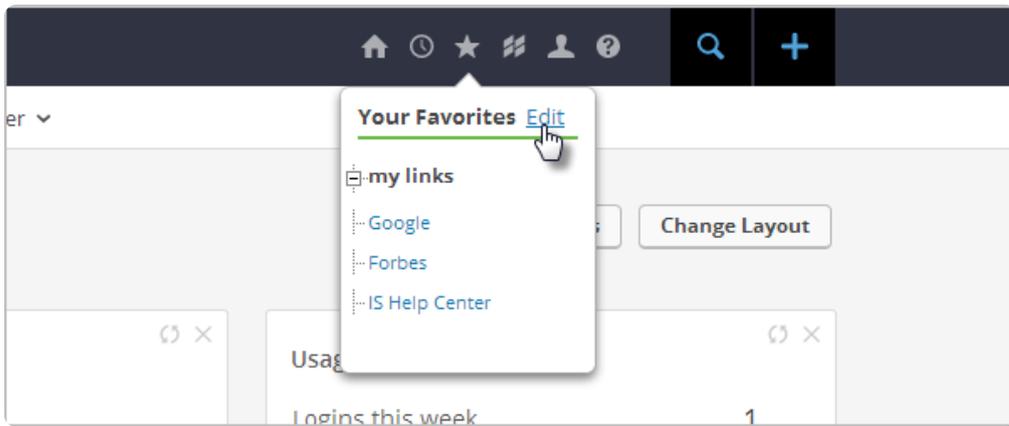
- **Initial setup** - If you need to make changes, you can come back and edit any section from this screen.
- **Dashboard** - return to your Dashboard
- **My day** - where you can manage tasks and appointments
- **Files** - upload or access company and/or your personal files



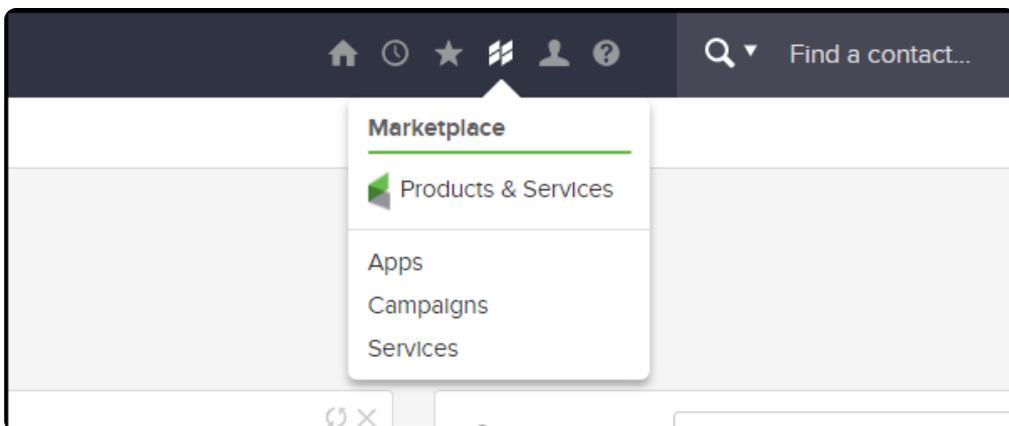
- **Recently Viewed** - This displays a list of the last few pages a user has viewed. It provides a quick way to navigate back to one of them.



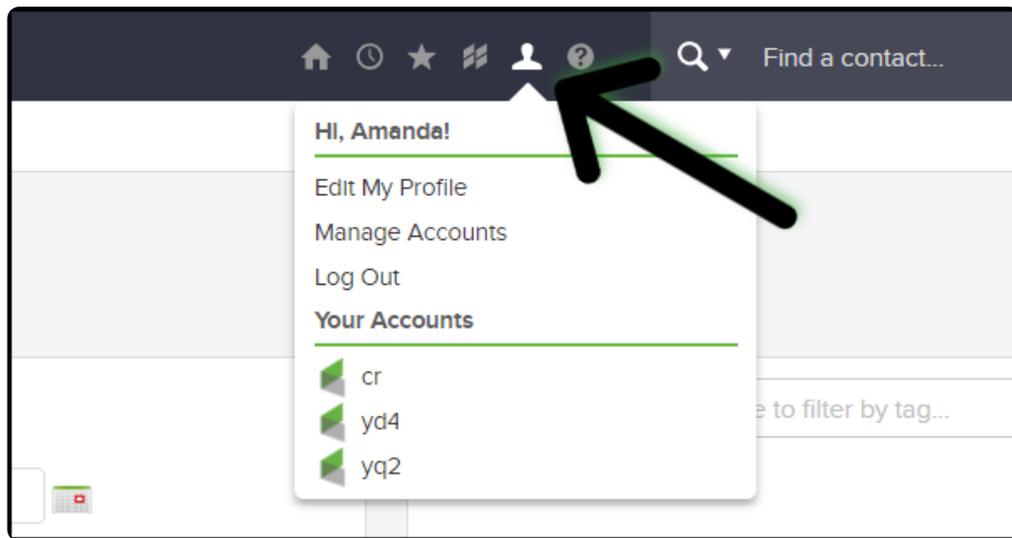
- **My Favorites** - This menu is customizable. Click on Edit to add a link. This is a great way to add links to external websites you frequent throughout the day (e.g. company blog, facebook, or twitter.)



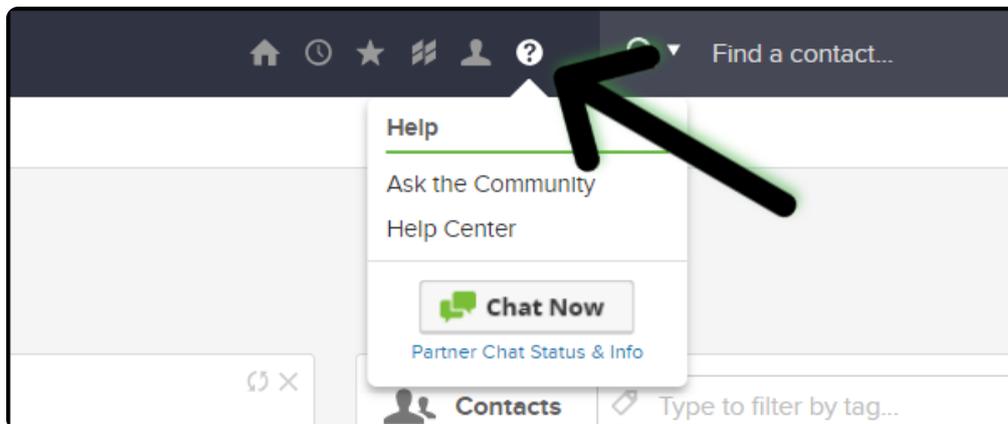
- **Marketplace** - You can download free campaigns, check out various 3rd-party integrations, and connect with a certified Infusionsoft by Keep consultant.



- **My Profile** - This menu gives you access to
  - Customize your profile
  - Manage accounts
  - Switch between additional apps
  - Log out



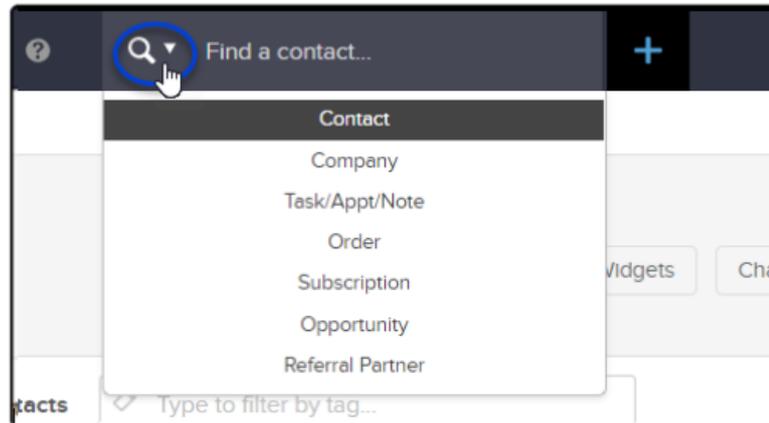
- **Help** - Quick link to our Help Center and/or ask questions and participate in the Infusionsoft by Keap Community .



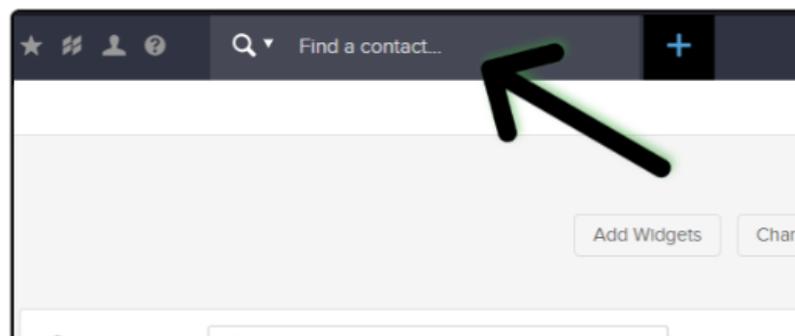
- **Search** -
  - Click the drop down arrow next to the magnifying glass to select category to search
    - **Contacts** - start typing contacts name to view matching profiles. Contacts have a automatic drop down to quickly click into the contacts record.
    - **Company** - search by company name. Unlike the Contact search there is no automatic drop down. Instead type in the company name and hit enter. You will either be directed to the company record or taken to a list if there is more than one record matching the name.
    - **Task/Appt/Note** - search using the contacts first name. You will be directed to a list of that contacts task/appt/note
    - **Order** - search by either contacts first name or order ID
    - **Subscription** - search by either contacts first name or subscription record

ID

- Opportunity - search by contacts first name
- Referral partner - search by contacts first name



Select category



Type search criteria

**Note:** When searching company, task, order, subscription, opportunity, and referral partner, the filters will always look for first for the first name. You can enter a first and last name but only entering a last name wont locate the record.

- **Contact Quick-Add** - Quickly add new contacts to Infusionsoft by Keap. Set a default Internal form as your quick add. For more information, [click here](#) .

