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.

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Dashboard My Day					
Dashboard - February 19, 20	19				Add Widgets Change Layout
Calendar Items		Ø×	Lt Contacts	Type to filter by tag	Ø×
View for Amanda Madsen v o	n 02-19-2019 a		10 new cor	ntacts	238
There are no items to display.			in the last 30	D days 🔻	TOTAL CONTACTS »
			Add a Co	iontact »	Import List »
* New Appointment	+ New Task				
Tasks Today •		Ø×			
There are no items to display.					
+ New Task	View All Results »				

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.

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My Nav	CRM	Marketing
🛉 Start Page	Contacts	Campaign Builder
	Companies	Email & Broadcasts
	Opportunities	Lead Generation
	Referral Partners	Templates
Customize Now	Visitors	Legacy
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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

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	Basic Training Initial Setup Dashboard				
	My Day Calendar Tasks	L Contacto	Ø Tur	ve to filte	r by tag
•	Inbox Files	Contacts	↓ Typ		i by tag

• **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.

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			🤱 Odessa Alford
			🤱 Solimon Reed
			🤱 Derek Dealmaker
	Order	Informati	

• **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.)

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	j-my links
	Google ; Change Layout
	Forbes
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• **Marketplace** - You can download free campaigns, check out various 3rd-party integrations, and connect with a certified Infusionsoft by Keap consultant.

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	Marketplace	
	Products & Services	
	Apps Campaigns Services	
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- My Profile This menu gives you access to
 - Customize you profile
 - Manage accounts
 - Switch between additional apps
 - Log out

♠ © ★ # <u>↓</u> @ Q ▼	Find a contact
HI, Amanda!	
Edit My Profile Manage Accounts Log Out Your Accounts	
cr yd4 yq2	e to filter by tag

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

n © ה	Find a contact
	Help
	Ask the Community Help Center
	Chat Now
۵× ک	Contacts Type to filter by tag

- 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 .

