

Infusionsoft Mobile

Infusionsoft Mobile allows you to manage and communicate to your contacts directly from your mobile device. Also, by leveraging tag goals, you can automate follow-up by tagging a contact. Infusionsoft Mobile currently offers the best experience on iOS and Android smartphones. Infusionsoft Mobile is available in the following countries: Australia, Canada, Ireland, Mexico, New Zealand, South Africa, United Kingdom, and the United States.

Install and Sign in

Download and Install Infusionsoft Mobile for iOS and Android. Download Infusionsoft Mobile from the [Apple Store](#) if you are using an iOS device, or from the [Google Play](#) store if you are using an Android device. You can also download the app from the [Infusionsoft Marketplace](#) .

1. Sign-in with your Infusionsoft ID. After you have installed Infusionsoft Mobile, open it and sign in to your account using your Infusionsoft ID.
2. After logging in, you will see an empty "Recents" screen; from here, you can sign out, access help, search for contacts, or add new contacts.

Find a Contact

Tap the **Search** icon to find a contact in your Infusionsoft account. You can search by First Name, Last Name, Email Address, or Phone Number. Simply begin typing the information in the search bar and the app returns a list matching your criteria.

Add a Contact

Tap the plus icon to create a new contact. You can add the following fields to the contact:

- First Name
- Last Name
- Company
- Job Title
- Phone (5 phone fields with the label options of mobile, work, home, other)
- Email (3 emails - the user must check the permission to market checkbox for each one If they would like to send automated communication to that email)
- Billing Address

- Shipping Address
- Person Notes

View and edit a contact

1. While viewing a contact, tap the pencil icon to edit.
2. Click the check-box to save your changes.

Pro-Tips!

- You can "long press" any of the fields to copy them.
- The "Person Notes" on the contact are not the "Contact Notes" in Infusionsoft; they are the "Person Notes" two tabs over on the contact record that exist in a large text box you append notes to.
- You can view the shipping and billing address for a contact but not the "other address."
- Once you view a contact, the information is cached on the phone. So if you don't have a network connection, you can still view contacts you've looked at previously. The data will be as recent as the last time you viewed that contact.

Call or text a contact

You can call a contact by tapping the phone field or tapping the phone icon. To text, simply tap the text icon.

iOS Pro Tips!

- On an iOS device, after you end a call with a contact, you will be viewing the Address Book and will need to re-open the Infusionsoft Mobile app.
- On an iOS device, you will not see previous text conversations with a contact when you are texting them; you will only see a compose sheet. If you wish to see a conversation thread, you must open the native iOS texting app to do so.
- Texting will not work on iPods or iPads with our app. This is due to a bug in Apple's code that prevents the feature from working with our code. Apple is aware of this but has not yet released a fix for it.

Email a contact

When you tap the email icon or anywhere on the email field, the native email app is opened with the contact's email address in the "To" field. When you tap "Send" or "Cancel", you are directed back to the contact record.

Map a contact's location

Tap an address field or the map icon to get directions to those addresses. Once you tap either the icon or the field itself, your phone's native maps app is opened with the point plotted on the map. You can cancel to go back to the contact record or proceed to get directions using your native map app.

Pro Tips!

- Once you tap to get directions, you leave the Infusionsoft app and enter your phone's native maps app. Once the route is complete, or you cancel early, you can navigate back to the contact record in the Infusionsoft Mobile app.
- In iOS, you can "long press" on the directions field and either "Copy" or "Open in Google Maps."

Apply and view tags

1. Tags are shown at the bottom of the contact record 5 at a time. You can swipe to the left to view more. If you have more than 45 tags, you will see a link that says "more."
2. Tap the space bar to view a list of all tags, or start typing the name of an existing tag to find it.
3. You can create a new tag by scrolling to the bottom of your list of tags and tapping on the Create & Apply button.

Pro Tips!

- When you navigate to the "more" link (if you have more than 45 tags for that contact), we can only show up to a thousand tags at a time.
- On the contact, Tags are organized from most recently applied.

Save a contact to your phone's address book

You can tap Save to Phone at the bottom of the contact record to save a contact to your phone's address book.

Android Tip! Android will only allow 1 address and 3 of the 5 phone fields to be saved to the device.
