August Update 2017 | Classic Infusionsoft

Automated List Management

List Hygiene is a crucial email marketing best practice and now Infusionsoft will take care of it for you. You now have access to two new email statuses and automation that will set these statuses for you. This feature replaces the manual List Hygiene process.

First, a definition of the 2 new statuses:

- **Unengaged Marketable Status** - These contacts are eligible to receive your automated marketing emails, but are tracked as not having engaged for a certain number of months. The default timeframe is 4 months.
- **Unengaged Non-Marketable Status** - These contacts will no longer be eligible to receive your automated marketing emails unless they engage with an email they've already received from you or submit an Infusionsoft web form.

You can now set a "contact engagement threshold" (in months) which identifies and sets these two new statuses automatically.

There is a new settings section that allows you to customize when these email statuses are applied to a contact:

1. Go to **Marketing > Settings** in the main menu
2. Click on **Automated List Management**

- Unengaged Marketable Status - As mentioned above, these contacts will still be eligible to receive your automated marketing emails, but are tracked as not having engaged for the number of specified months.
  - The default timeframe for this status is 4 months - which is the hard-coded policy currently in place. Based on this threshold, after 4 months with no engagements (opens, clicks, web form submissions), all contacts with confirmed or unconfirmed email status will automatically move to an Unengaged Marketable status. In this status, contacts are still eligible to be sent automated marketing emails, but keep in mind that no engagement after 4 months increases risks for excessive spam complaints or hard bounce s due to email accounts becoming inactive over time. Once these contact re-engage with your marketing efforts (open, click, or submit a web form) their email status will return to the previous state.

- Unengaged Non-Marketable - As mentioned above, these contacts will no longer be eligible to receive your automated marketing emails unless they re-engage (open, click, web form submission.) If they re-engage, their email status will return to its previous state.
  - Please toggle this **On** and set your timeframe. The default timeframe recommendation is 12 months, but you can adjust 1-24 months

depending on your preference. It must be equal to or larger than the Unengaged Marketable threshold.

- You can also disable this functionality by toggling the switch to the **OFF** position.

3. Click **Save Email Address Status Limits** to save your settings

Simplified OAuth Flow in Account Central

When a user logs into the account central page, http://signin.infusionsoft.com , they will experience a new link "API Access" on each app to which their user is connected. Everything described below can already be done programmatically through the API (that functionality will remain in place). This is just a way for the developer to not be required to implement quite as much code because we're now handling some of the token generation for them.

"Partner" use requires the user to enter in the partners OAuth Client ID (provided by the partner to the customer). Clicking "Generate Auth Code" will generate an authorization code which the user can then give to the developer partner for the partner's use in connecting to the user's app.

If you are giving an authorization code to a 3rd party, be sure to have them pass in a

redirect_uri of "null" when they request an Access Token. If the 3rd party attempts to request an access token without a redirect uri of "null", they may see the following error:

```
{    "error": "invalid_request",    "error_description": "Invalid redirect_ur
i"}
```

OR

```
{    "error": "invalid_request",    "error_description": "Missing redirect_ur
i"} (edited)
```

Example of a valid request:

```
POST /token HTTP/1.1    Host: api.infusionsoft.com    Authorization: Basic
czZCaGRSa3F0MzpnWDFmQmF0M2JW    Content-Type: application/x-www-form-urlencod
ed    grant_type=authorization_code&code=SplxlOBeZQQYbYS6WxSbIA    &redirec
t_uri=null
```

"Any Time" Now Available in Delay Timer

You no longer need to set an arbitrary time window if you want something to be sent at any time of the day. When setting up a delay timer in the campaign builder, just select the **Any Time** radio button. Note that you can change the timezone to **Use contact's time zone** by checking the box shown below:

Added Conversion Rates to Email Broadcast & Email Broadcast Conversion Reports

Quickly identify which emails are performing well and which may need to be optimized.

Opened	Clicked	Opt-Outs	Bounced	Opened Rate	Clicked Rate	Opt-Out Rate
0	0	0	0	0%	0%	0%
0	0	0	0	0%	0%	0%

1. Go to **Marketing > Reports**

2. Navigate to either the **Email Broadcast Report** or the **Email Broadcast Conversion Report**

New Permission for Non-Admin Users to Access DKIM Settings

You can now permission non-admin users to modify your DKIM settings. Click here to learn how.

Infusionsoft Sidebar Updates

- Additional language support for: Spanish, French, Portuguese, Russian, and German
- Support for Outlook.com Agent
- Ability to see the campaign history and status of a contact. Click here to see the full article.

WordPress Opt-In Form Statistics

In the **Statistics** sidebar tab , you can view aggregate statistics for all of your WordPress opt-in forms over last 30 days and last 12 months

Email Builder: Button Links can now be cloned

When you clone a button in the Email Builder, you now clone the link as well. Previously, you had to manually re-enter the link URL every time you cloned a button.
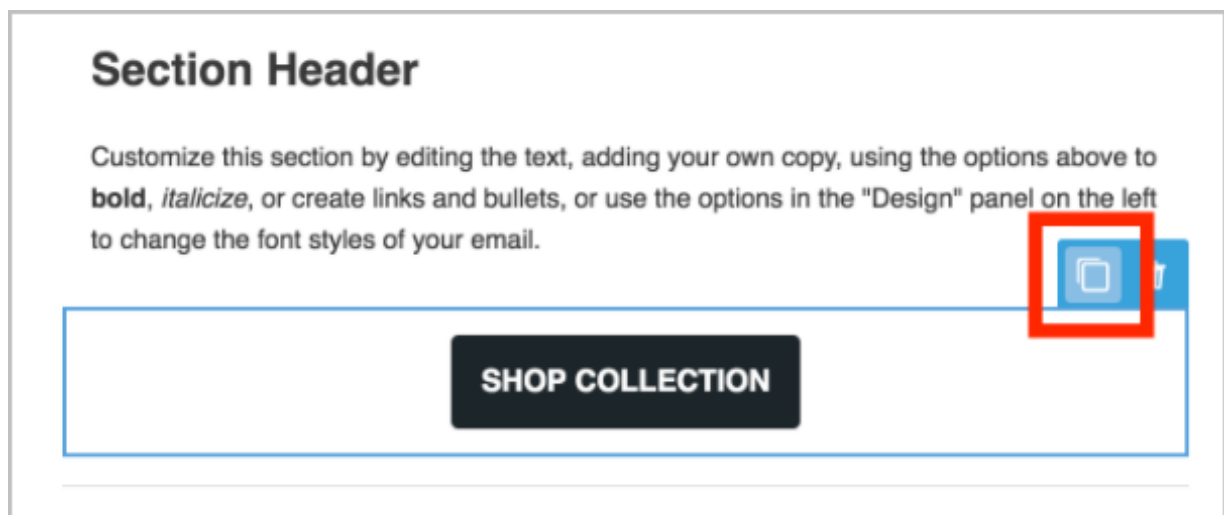
API Updates

API Documentation

- Updated text to recommend providing your access token as a Bearer token through an Authorization request header.
- Documentation now allows copy/paste of body sample text.
- Added emphasized link to our new OAuth guide .
- Added callouts to certain Contact endpoints explaining how to opt-in a contact .

General API

- New operation added: Apply Tag to Contacts .
- New operation added: Remove Tag from Contacts .
- Removed erroneous duplicate check option from Create or Update a Contact . Valid options are Email or EmailAndName.

REST Hooks

- The Infusionsoft REST API now supports RESTHooks.org's "delayed confirmation" of subscriptions .

We've also added a significant number of Hooks:

- Added appointment.*.
- Added company.*.
- Added invoice.payment.*.
- Added note.*.
- Added subscription.*.

As always, please refer to List Hook Event Types for an up-to-date list of available REST Hooks.