The UNOFFICIAL Administrator's Pocket Guide to Infusionsoft

BEST PRACTICES, TIPS, TRICKS, AND SECRETS OF THE MOST POWERFUL WEB APP FOR SMALL BUSINESS.

Virtual VP OF MARKETING

TYLER GARNS

THE Unofficial ADMINISTRATOR'S POCKET GUIDE TO INFUSIONSOFT

Best practices, tips, tricks,
and secrets of the most powerful
web app for small business

Tyler Garns
Summer 2012

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OVERVIEW

Why a "Pocket Guide"?

You: What?! This thing is 44 pages long! Why in the world did you call it a "Pocket Guide"?

Me: You're right. But, if you documented everything about Infusionsoft, I'm confident that it would fill volumes upon volumes. So, I've distilled the best of the best info into this "pocket guide". I've tried in most cases to avoid topics that you can find answers to in the Infusionsoft help center.

You: Why should I read this when Infusionsoft has an online help center with video tutorials?

Me: The intent of this guide is to help you answer the "Why" questions and the "Should I" questions and to share best practices. This is not a "how to" guide. That's what http://help.infusionsoft.com is for.

It's also intended to help you set up your account the "right" way and keep it organized during the years to come.

As you know because of its power and flexibility, there are often many ways to accomplish the same task in Infusionsoft. This guide will help you know "why" you should do it one way over another.

Infusionsoft is a powerful, no doubt. It's intricacies are never-ending. It enables you to execute intricate and complex campaigns - and therefore, no matter how easy it becomes to use, there will always be complex things to consider when using Infusionsoft. It's not a matter of the software, but the complex problems it helps you solve. As soon as you think you know all the ways you can leverage Infusionsoft, you're slammed over the head with a mind-numbing problem you can't figure out. I should know - I managed Infusionsoft's own Infusionsoft account for a few years.

During that time I developed a handful of best practices, and learned a lot from other employees and Infusionsoft users. Since I left Infusionsoft at the beginning of 2012 I've continued to learn from clients, partners, and develop more best practices of my own.

If you're a proud Infusionsoft user like I am, and you want to leverage Infusionsoft to the max, this Pocket Guide will be an invaluable resource to you.

How The Pocket Guide Is Organized

The Pocket Guide is organized by functional area of Infusionsoft with additional sections for Legacy, Reporting, and Tips & Tricks. Other than that, it's pretty random. Use the Table of Contents to get what you're looking for if you have a specific question.

From My Heart To Yours

This guide can't include EVERYTHING I know about Infusionsoft. But, it does include a ton of what I've learned through experience. There are a lot of blood, sweat, & tears in this guide. You'll read things in this guide that seem simple and intuitive, but realize that they became that way after toiling for hours, days, and even weeks to come up with the right solution. My only hope is that this guide saves you from some of that trouble.

Even if you think you know everything there is to know, you're bound to find something in this guide that is far more valuable to you than what you paid for it.

If you read this guide and you learn absolutely nothing new, please email me. I'd like to give you a big hug - you've spent way too much time battling through the tough problems in your business - you're in severe need of a hug.

With love,

Tyler Garns

P.S. Although extremely VALUABLE, this is perhaps the most BORING writing I've ever done. I'm sorry. I could spice it up with stories and jokes, but I thought I'd just keep it short & sweet, focusing on the meat & potatoes of the content. I wish it were more exciting, or subconsciously sold you more of my stuff. But the truth is, it's hard-core Infusionsoft knowledge. If you can get through it and find the gems that you need, you'll be way ahead of the 90% of people who will download this and not even read it.

P.P.S. Because of it's nature, this guide might be better consumed as a reference in times of need rather than reading it straight through. Think of the areas of Infusionsoft that you're struggling with right now and read those sections first.

ADMIN

"Infusionsoft Secretary"

As the "Administrator" of your Infusionsoft account, you have a tough job. Not because of Infusionsoft, but because of the all the responsibility that lies on your shoulders. You need a secretary to remind you when to do things. In this guide you'll learn techniques for "pruning" your Infusionsoft account. Pruning old templates, sequences, campaigns, and other info is necessary in order to keep your account organized. If you don't prune regularly, you'll end up with a cluttered mess in the near future.

To avoid this, use Infusionsoft as your personal secretary. She's a secretary you'll have to remind (set up), but once you remind her, she'll remind you back. For example, if you set up a campaign for an event, and you'd like to delete (or prune) that campaign 30 days after the event, be sure to set up a task in Infusionsoft to remind you to delete that campaign on the date specified.

This is a "no brainer", but I've yet to find any Infusionsoft customer that actually does this. Instead, Infusionsoft accounts all over the world are full of expired campaigns.

Contact Record Documentation

Sometimes you make changes or set something up in Infusionsoft and then later you forget what it was all about. One easy way to avoid that problem is to create a contact record specifically for the purpose of taking notes. This is particularly helpful when you have multiple employees working in Infusionsoft. Establish a rule that anytime any user edits, deletes, or creates anything in Infusionsoft, they mush go to that contact record and enter a note explaining what they did. Since Infusionsoft doesn't log users' activities, this is a way for you to trace back who did what. It's not perfect, but it works. Set up a humiliating punishment for employees who don't follow the rules. ☺

Internal Notifications

By default, the "To:" address in email templates is the contact's email address. It's very easy to alter that address in order to send an email to yourself or another employee. When accessing email templates, click the "change" link next to the "To:" address. When inside the Campaign Builder, select "Other" from the "To:" dropdown. You can notify the contact's owner by using `~Owner.Email~` in the "To: Email Address" and `~Owner.FirstName~`

`~Owner.LastName~` in the "To:Name" field. Or you can hard code a particular person's email address and name if the recipient is fixed.

This is most helpful to notify sales reps or customer account reps of activities that their leads or customers may be participating in.

Action Sets

The entire Infusionsoft Legacy system was built on Action Sets. Action Sets can be confusing to many people. Especially when you start chaining Action Sets together. Remember, Actions Sets run a whole bunch of actions all at the same time. There is no scheduling in Action Sets.

Action Set Naming & Identification

When you go to your list of Action Sets in Infusionsoft, you'll notice that there are a LOT of Action Sets in there, and most of them you won't recognize. Since the Legacy system was built on Action Sets, EVERYTHING used them: Follow-up Sequences, Web Forms, Order Forms, etc. So, here's how you can identify where an Action Set came from:

When you look at your list of action sets, notice the right hand column called "Linked to". In that column you'll find the following identifiers. Each identifier is usually followed by an ID or a name to help you narrow down the exact item that triggers that Action Set.

TriggerEmailBounce - These are action sets that are run when emails bounce

Campaign - These are action sets that run as "Completion Actions" in a legacy follow up sequence

SystemEmailLink - These are action sets tied to legacy Automation Links

OptOut - These are action sets tied to OptOut Links

CustomFormWeb - These are action sets tied to legacy Web Forms

ActivityHistoryTemplate - These are action sets tied to Note Templates

APPLICATION - These are action sets run by the application, typically when a contact is created or updated via the API

ORDER - These are action sets run as part of a purchase process

pNumber - Any action set linked to pNumber is run when that product ID is successfully purchased. i.e. p247 runs the purchase actions for product number 247.

cNumber - Same thing as above except it is for subscriptions. c stands for continuity.

TriggerStageMove - These action sets are run when opportunity stages are moved

OPPORTUNITY - These action sets are run when someone clicks on a 'buy now' link or purchases from a 'buy now' link sent from an opportunity record

CustomFormSale - These action sets are run when Order Forms are processed

TriggerAutoChargeAttempt - These action sets are run as part of the billing automation

Any Action Set that is blank in the "Linked to" column is an action set that was created manually.

Action Set Pruning

Infusionsoft leaves a lot of "orphaned" records in the Action Set area. For example, if you create a legacy follow-up sequence with completion actions, and then you delete that follow-up sequence, the Action Set will remain. I'm sure this is done purposefully in case the Action Set is utilized elsewhere - which is possible by chaining Action Sets.

So, regular pruning of your list of Action Sets is a good idea. I wish there were a simple way to do this, but there isn't. First go through the list, identifying your Action Sets by the "Linked to" column. If the "Linked to" item no longer exists, and you're not using that Action Set anywhere else, you can delete that Action Set. After you've done that, and deleted any old Action Sets, go through the Action Sets that were manually created and delete those that are no longer used.

Purchase Actions

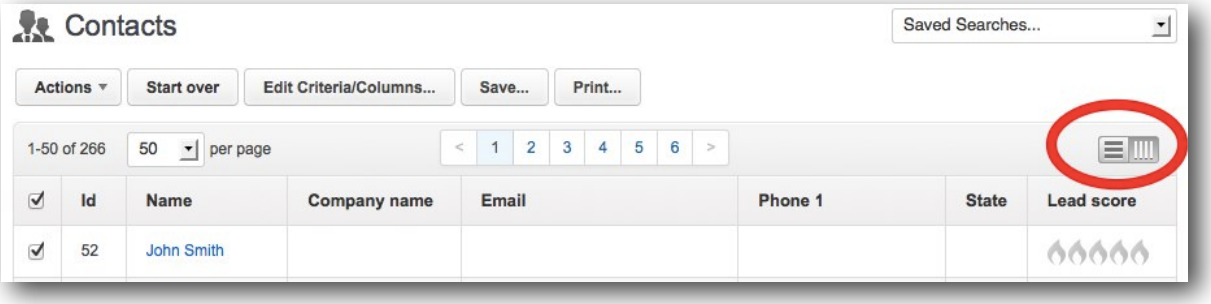
Purchase Actions (accessible via E-Commerce Setup ⇒ Actions ⇒ Purchase Actions) are Action Sets that will run whenever a specific product is purchased. If you want those actions triggered in any case of a purchase (whether it happens through the shopping cart, an order form, the API, or a manual order) be sure you have checked "Yes" in E-Commerce ⇒ Settings ⇒ Product ⇒ Run Purchase Actions On All Orders.

It's important to realize that in the Campaign Builder, you can set up a "Goal" that essentially does the same thing. Make sure you don't have purchase actions AND a goal in the campaign builder that inadvertently trigger unintended actions.

Interactive View vs Grid View

Whenever you're looking at a list of results from a search, you have the option of viewing that list in Grid View or Interactive View.

See the screenshot below to identify where to toggle between Grid and Interactive View.



Interactive view is best for sales reps, customer support reps, and anyone else who is "working a list". Grid view is best in all other circumstances. Whenever you save searches, be sure the appropriate view is selected.

Users

Infusionsoft is currently not set up to fully manage users the way a system administrator would like to. Infusionsoft does not log users' activity. Setting permissions is a bit of a hassle, but here are a few guidelines to help out.

Global Permissions

I prefer to lock things down pretty tightly. So, I'd suggest setting your global permissions in a fairly restrictive manner. But, with that said, you should set your global permissions to be as restrictive as you'd like for the "average" employee. Since you'll need to edit individual user permissions anytime a new user is added, you want to do as little work as possible. If your global permissions are set to the "average" employee, you'll do a lot less editing than if your global permissions were set to be far more restrictive or far more loose than the average.

Note: Anyone who is set as an Admin user gets all permissions. You cannot restrict their permissions while giving them "Admin" access. Keep that in mind as you review the list of guidelines below. Admins always have permission to do everything.

Here are a few guidelines I like to follow for global permissions:

- No one gets access to re-assign contact owners (except admins)

- Everyone can use note templates
- No one can merge or delete contacts
- No one can change lead source
- The previous four also apply to Opportunity records
- No one can edit or create commission programs
- No one can create or delete referral partner payouts
- No one can create manual referrals
- No one can mess with orders or invoices except to view them
- No one can mess with any E-commerce stuff - can't add products, etc.
- No one can mess with User records
- Only certain people can add tags
- No one can import records
- No one can mess with Marketing stuff except for marketing people
- Ideally only one person in the organization should be sending email broadcasts - you'll see why when you read what I recommend for ensuring broadcasts go to the right people

Of course there are always exceptions to the rules. And of course, Admins can do everything. Be judicious with who you give Admin access to.

User Permissions

Permissions are only granted on the individual user level. Aside from your default permissions, you can not set permissions in bulk. You cannot set permissions by user group. That would be nice, right? But that's currently not available.

The Secret Trail

As mentioned before, Infusionsoft does not log user activity. But, there is a place where you can track down a guilty culprit. If a user creates a web form (either in the Campaign Builder or a Legacy web form) Infusionsoft sets up an email notification to that user by default. As long as the user doesn't edit the Notification Email, their email address will be left as a

bread crumb, leading you back to them. Don't tell them about this. Just use it to find people who don't follow your rules. ☺

Testing

Whenever possible, avoid testing in your Infusionsoft account. It only creates clutter and messes with your reports. Use a sandbox account (discussed in the next section). But, once you've tested thoroughly in your sandbox account, you'll need to run a final test in your live account before you launch. Create one contact record specifically for testing. Don't create a bunch of them. Make sure you use the word "Test" as the first name so that this record is easy to identify. Once you've run your tests and verified that all is well, delete your test contact record and all orders/invoices that go with it. That way your sales & revenue reports will not be incorrect because of test data.

Sandbox Account

Infusionsoft now offers free sandbox accounts to anyone who would like one for testing purposes. The sandbox accounts have full feature functionality. They are restricted in the number of contacts they can hold.

Unfortunately you cannot copy your existing account information into your sandbox account. You'll need to set things up from scratch.

Get your Infusionsoft sandbox account here.
http://help.infusionsoft.com/developers/sandbox

Custom Fields

You're probably aware that your Infusionsoft account is restricted to 100 custom fields per record (Referral Partner, Company, Contact, Task/Appt/Note, Order, Subscription, Opportunity). I often hear people complain that 100 is not enough. In the majority of those cases, I find that they are using Custom Fields incorrectly. Usually tags are sufficient.

Custom Fields vs Tags

If you're collecting general data about people that you'll use for searching and segmenting later, use tags. If you are collecting specific data about people that you need to recall later or merge into an email, use custom fields. Let's talk through a couple of examples:

Example 1: Assume I want to know if someone's favorite color is red, blue, or yellow. I'll use that data to send a free widget of their favorite color to them via direct mail. I'll also

market products to them in their favorite color. In this case, I'd set up a web form with a radio button option that allows them to select their favorite color. I'd use the campaign builder to tag people based on their preference.

Example 2: Assume I want to know what a person's favorite color is and I want to allow them to enter in whatever they want. I'd use a custom field in the web form. I could then merge their favorite color into emails back to that person. But, I would be limited in my ability to search and sort those people by color because they can type in whatever they want. Some people might type "gray" while others type "grey". You also get variations like "light gray", "dark gray", and "blue-gray".

Here are a few rules to follow:

Use tags if the values can be predefined
Use tags if segmenting and searching is important

Use custom fields if the data is specific
Use custom fields if you need to merge the data into communications
Use custom fields if you need to search by arbitrary values

If you're running out of custom fields, you're likely over-utilizing them and underutilizing tags. In some cases, like attempting to recreate a medical record, you will run out of custom fields. I'd suggest not using Infusionsoft for your electronic medical or legal records. Infusionsoft is not built for those types of extensive records.

Custom Field Types

It's important to understand the different field types that are available as you set up your custom fields. If you want to be able to search a number range (i.e. greater than 3 and less than 10), use a 'whole number' or a 'decimal number'. If you want to be able to search a date range, use a 'Date' or 'Date/Time' field. You cannot search value ranges in 'Text', 'Text Areas', or various other field types, but you can search with operators such as 'starts with' or 'contains', which are very useful when dealing with word values such as names. When creating custom fields, consider first how you will want to use the data and how you may search on that data. That will determine which field type to use.

CRM

Tags

Infusionsoft's system of tagging is awesome. It's one of the most powerful and easily leveraged features. The tagging system is truly revolutionary in the CRM space. Other software providers have copied it and more are doing so. Tagging is perhaps the single most important feature in Infusionsoft. Without it you just can't execute the elegant targeted campaigns that are possible with Infusionsoft. But...

...With much power can come great chaos.

Managing your tags can be tough if you don't approach it with a bit of thought and planning first. Here are a few pointers:

Tag Categories

The key to getting tags right is in setting up the right categories. I generally like to have categories that have at least 5 tags in them but no more than 30-40 tags (unless it really makes sense to have more).

Here's how I break down tag categories:

<u>Who they are:</u>

Prospect
Customer
Vendor
Partner
Etc.

<u>Products they're interested in:</u>

Product A
Product B
etc.

<u>Topics they're interested in:</u>

Growing their business
Marketing
How to get more leads

How to convert more sales
etc.

Products they've purchased (this may or may not be covered by the "Who they are section"):

Product A
Product B
etc.

Behaviors

Filled out webforms
Clicked links
Attended live events
etc.

I always like to have a Temp category as well. This is for temporary tags that end up being created for searching & sorting purposes and it's ok if they get deleted once a week. I usually name it "Temp (deleted every Friday)" so that people know those tags are truly temporary. This category will save you from a lot of headache as long as people are trained to use it whenever they're doing segmenting and creating temporary tags in the meantime.

It's good to have an Internal category or two as well. Sometimes it makes sense to have tags that relate more to internal things than something that is happening directly with prospects/customers.

Once your categories are defined, then it's just a matter of training staff of what each category is for and how to create new tags within the categories (primarily enforcing naming conventions).

Tag Naming Conventions

The specifics of your naming conventions don't matter - only that you have them and they make sense for people in your organization. Remember that tags get sorted alphabetically in the search & report select box lists. So, in order to find tags quickly, you'll want to start your names with the words that you'll remember the most.

Here are some tag naming conventions that I've used:

Event based:

Name of Partner – Event Name (date) Segment
ie: John Smith – The Maze Webinar (4.17.11) Attended
ie: Create a Successful Marketing Plan Webinar (7.27.11) Registered

Campaign based:

Campaign - Step - Behavior
ie: 7 Secrets Free Report - Download Follow Up - Clicked Link

Here are a few tag rules to follow:

Never make a tag without a category (they end up at the top of the lists and clutter things up)
Never put an employee's name in a tag (everyone starts making their own tags and it gets messy)
Use words that describe well what the people with the tag are all about
Use a standard date format (7.17.11 or 7-17-11, just keep consistent)
Use the same names for associated web forms & follow up sequences

Tag Pruning

Tags are extremely powerful for segmenting specific groups of people for targeted marketing campaigns. The more detail the better. So, I generally tag people for everything they do. But that detail becomes less important the further we get away from that event. For example, if someone clicked on yesterday's email about persuasive copywriting, I'm likely to leverage that information by sending an offer for a persuasive writing course tomorrow. But, in 6 months, I don't need to know the specifics about the person clicking on that particular email. All I need to know is that they expressed interest in persuasive copywriting.

So, on a regular schedule, I recommend consolidating tags. Go through your tags and determine if the "intent" of the tag is more important than the "detail" of the tag. If it is, then consolidate. In the example above, I'd find all the people that clicked on my email and tag them with a "Persuasive Copywriting" tag in my "Interests" category. Then, once I've done that, I'd delete the tag representing the fact that they clicked on my email. All other people who have ever expressed interest in persuasive copywriting would end up with that tag also. This way I can still maintain the important information for targeted marketing purposes, but I don't keep the clutter of every specific tag.

I suggest consolidating and pruning your list of tags every 6 months.

Segmentation

Automated marketing is awesome, right? But it can easily create a situation where people on your list are automatically hearing from you way too often and messages aren't coordinated. The following sections will show you some ways to avoid this.

Exclusion Timer For Email Broadcasts

When sending email broadcasts you should be finding targeted segments of your lists to send specific messages. But, what if you have a segment interested in Product A and a segment interested in Product B and some of those were also interested in Product A. Sometimes you'll want to send them an email for both. Other times you'll want to exclude them from one of the broadcasts in order to not bombard them

Usually it's a matter of reducing the frequency of emails. One way to do this in an automated way is to set up an exclusion timer. Let's assume we want to make sure we don't send a broadcast to the same person more often then once per week. We'd set up a follow up sequence called "7 Day Timer" that applies a tag "Exclude from broadcasts" in an immediate step and then removes that tag 7 days later. Anytime we send a broadcast we would exclude people with the "Exclude from broadcasts" tag and once the broadcast was sent we'd add all recipients to that sequence (excluding them from broadcasts for 7 days).

I prefer to create a tag category called "Email Exclusions". All tags that I'm using for excluding people from communications would go there. That way they're all easy to find and exclude when sending broadcasts.

Sequence Exclusion

When prospects or customers are in an automated email sequence it usually makes sense to exclude them from email broadcasts. The message of your email broadcasts may conflict with the intent of the automated sequence. It's easy to exclude those people. At the very beginning of a sequence just add a tag in your "Email Exclusions" category and remove that tag at the very end of the sequence. Any time you send a broadcast, be sure to exclude those people. Easy, but rarely used. Now you're ahead of the pack.

Opt-Outs

When people opt out of your email marketing, Infusionsoft will automatically exclude them from your broadcasts. But they are not excluded from the your lists automatically. Apply a tag in your "Email Exclusions" category when someone opts out so you can exclude them

from your broadcasts and keep your reporting clean. You may even opt to delete their record completely after some time has passed.

You can apply this tag upon opt-out by using OptOut links under Marketing ⇒ Settings ⇒ Marketing Settings ⇒ Automation Links as well as Marketing ⇒ Settings ⇒ Template Settings ⇒ Email Defaults ⇒ When Someone Opts Out of All Email Marketing.

Lead Scoring

Lead Scoring is a new feature in Infusionsoft, but I've been using lead scoring through a hack I developed for over 4 years. The concept is awesome, but the current implementation in Infusionsoft is not a useful as it will be in the future.

I'm not going to go into all the nuances and potential implementations of lead scoring here. I'll save that for a future version when the feature is built out better.

But, in the meantime, this is the best feature currently available out-of-the-box for identifying recently active leads (currently hot leads).

You can only change lead score by applying tags. So, use tags to increase the score when they take action. And use a delay sequence to reduce the lead score after certain length of time with no activity. I have a video in my Virtual VP of Marketing (http://www.marketingvp.biz/) membership that teaches this in detail.

Sales Automation

There is extensive documentation in the Infusionsoft Help Center on how to set up and use the Sales Pipeline and Sales Automation features of Infusionsoft. But I'll share just a few crucial tips here.

Order Spacing Is Important

When setting up the stages in your Sales Pipeline, one of the values you must enter is the Order. The Order defines the order of the stages in the list as well as in the drop down that sales reps use. Pretty basic. But, when you set up the order, be sure to enter numbers with some spacing in between. I prefer to number by 10's. My first stage order will be 10, my second stage order will be 20, my third stage order will be 30, and so on. This allows you to easily add stages at a later point (which you *will* want to do). If you've ordered your stages 1, 2, 3, 4, etc. You'll have to change the order of a few stages in order to make space for inserting a new stage.

When To Automate Sales Communications

Sales reps tend to believe that they perfectly customize and craft their message for each individual based on the individual's needs. I know, I've got years of sales experience. But, the truth is, each interaction is fairly similar to the rest. That being said, there are times when you want to automate the communications and there are times when the sales rep needs to customize the communications.

The best times to automate sales communications are during the contacting stages and after the sale, but not in between. For example, a perfect time to use automated messages is when you're trying to contact a lead and you call and leave a message. I prefer to set up 3 "Left Message" stages: "Left Message 1", "Left Message 2", and "Left Message 3". When the rep calls and leaves the first message, they move the lead into the "Left Message 1" stage. That automatically triggers an email from the rep saying something to the effect of "Hey Bob, I just gave you a call....". If the rep calls and leaves another message, they'd put the lead in the "Left Message 2" stage which triggers and email like "Hey Bob, I called you again....". And of course the "Left Message 3" stage triggers an communication like "Hey Bob, looks like you're busy. I'm going to take you off my list....". You get the idea. After someone purchases and they get put into the "Won" stage, it's appropriate to trigger a new customer campaign.

When you're in the negotiating phase of the sales cycle, be sure to make appropriate stages available for tracking the sales progress, but don't trigger any automated communications. That doesn't mean you shouldn't use automation. Often times leads have the same questions. Set up Note Templates for the sales reps to use when responding to those one-off common questions.

Checklists

A very underutilized feature of Infusionsoft is the sales stage checklist feature. Although humans are genius's, we're not great at completing repetitive tasks with exactness the way computers do. The checklist feature can be used to ensure that sales reps complete particular steps, or gather specific information before moving a lead to the next stage.

When Creating An Opportunity Record...

If you have a step in a campaign that automatically creates an Opportunity Record, you'll notice a setting that says "Only create if this Contact doesn't already have an active Opportunity?" Basically this is asking if you want to create a duplicate Opportunity if the person already has one. In most cases, you don't want duplicates, so select "Yes". It does make sense to allow duplicates if you have different product lines and you want different Oppor-

tunities to be created for each product. Or if you have upsell products and you want an additional Opportunity record to be created for the upsell after the initial purchase. If you select "No" for this option, just be sure you restrict well how people get into that step so as to avoid true duplicates.

Referral Partners

Referral partners (A.K.A. Affiliates) can be a great source of leads when leveraged appropriately. Unfortunately, this is one of the areas where I most commonly see gross errors in setup, mainly from a lack of understanding and a lack of good documentation on Infusionsoft's part. Read closely if you're using the Referral Partner module.

I've seen major problems in the accounts of some big companies because of poor Referral Partner setup. Getting this right is crucial if you want to keep your referral partners happy and promoting.

Commission Programs

Commission Programs in Infusionsoft are intended to be used for groups of people not groups of products. That's important. DO NOT set up a new commission program every time you're getting ready to launch a new product. That will cause serious problems.

Let's walk through a couple of scenarios:

It's appropriate to set up multiple programs when you have groups of people that get different commission percentages.

Let's say I have "Standard Affiliates" and "Gold Affiliates" and they're all selling the same products. Standard Affiliates get 10% commission and Gold Affiliates get 25% commission. I'd set up two separate Commission Programs for those two groups of people. I'd ensure that my partners are only in one of the programs.

When To Use More Than One Commission Program

In another situation, I might have "Standard Affiliates" and "Preferred Partners". "Standard Affiliates" get 10% commission and "Preferred Partners" 10% commission on most products and 20% commission on select products. But ONLY the "Preferred Partners" can promote my Elite products. In this case I would set up my Standard Affiliates commission program and put both groups of people in it. Then, I would set up my Preferred Partners commission program and only put the Preferred Partners in it. There would NOT be a default commission rate in that program. There would only be product overrides for the select products that pay out 20% commission and the Elite products.

It's important to understand that Commission Programs also determine the resources that referral partners have access to. In the above scenario, the "Standard Affiliates" would not have access to the Elite products promotional resources inside the Referral Partner Resource Center.

Sometimes you might have a one-off partner that gets a special commission rate. In that case, it doesn't make sense to create a new commission program because that one partner does not constitute a "group of people". Just go to that partner's individual record and create overrides at the referral partner level.

One Referral Partner Record Per Contact

I've seen some customers make the mistake of creating additional referral partner records for each commission program. This is a MAJOR mistake. Each referral partner would then end up having multiple logins to different resource centers and multiple ledgers. That is a big problem. It also sets up a scenario where you could double pay a partner if you have a tiered referral partner structure. Don't do it. Always have only one referral partner record for each contact. Manage their commissions through various commission programs.

MARKETING

Campaign Builder

The Campaign Builder is the biggest revolution in the small business marketing automation space in years. It's truly revolutionary. But, if you're a Legacy user, it does take a bit of mind-bending to wrap your brain around how it works because it's different than the way we're used to. Once you "get it", the world of automated marketing opens up to you in a beautiful way.

All-In-One vs. Multiple Campaigns

Since the Campaign Builder gives you a "blank canvas" to create whatever you want, one of the first questions that arises is: "Why not design my ENTIRE business in ONE campaign?" It's a great question. I've started down that road a couple of times. Here are the reasons I suggest NOT putting your entire business in one campaign:

- Panning the canvas becomes tiresome when the campaign gets really big - and it will get very big
- If the campaign breaks, your whole business goes down, not just that one area
- When a contact enters a campaign, they cannot enter that campaign again - if you have multiple sequences in one campaign, they can't enter again if they're already in it - this could present some problems

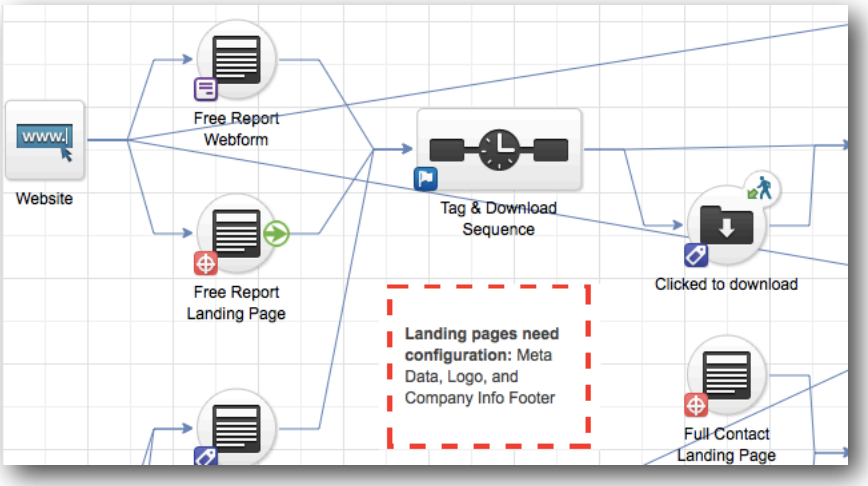
Needless to say, create individual campaigns for each major milestone in your customer experience.

Annotation

The Campaign Builder has a "Notes" snippet that can be used very effectively for documentation. If you have potential turnover in your business, be sure to document everything as clearly as possible so that new employees can understand what's going on and why things were set up the way they were.

The Notes feature can also be used to annotate what needs to be done - kind of like progress notes.

Be aware that the Notes snippet accepts full HTML, so your note can be styled however you'd like. See the example below. I added a red, dashed border around the note so it would stand out.



Tips & Tricks

Here are a few tips to get you started with the Campaign Builder and avoid a few headaches:

- To move/pan the campaign canvas on a PC: Shift + click and drag OR right-click and drag
- To move/pan the campaign canvas on a MAC: Control + click and drag
- Click and drag to select multiple items on the canvas and move them as a group
- Blue connectors ( ) can be disconnected and moved without any problems
- Red connectors ( ) cannot be disconnected without causing problems - this usually happens with decision nodes
- Snippets snap to the upper left corner of the grid box that your cursor is in when you let go (this will help you align things when you first place them instead of having to drag them around a bunch)
- Setting a goal as an entry point turns it into a "Global Listener", otherwise it only listens for that goal to be completed for people who are in the campaign
- Be sure to "Publish" after you make any changes
- Click the "Live View" tab to see what's been published

- There are no "actions" in the campaign builder - all "actions" are run within sequences now

Templates

Up until Release 24 (Spring 2012), the word Template in Infusionsoft was a misnomer. Typically templates are files that, when opened, create duplicate copies of themselves and those, when saved, do not overwrite the original. Templates in Infusionsoft were essentially just normal files. That's why the "Clone" feature was developed. If your account existed before Spring 2012 (or if you use the Legacy features much), you're likely to have a LOT of Templates, most of which were probably created for a one time broadcast and can be deleted.

If you've been using the Campaign Builder exclusively, then your library of Templates is probably much more clean. Going forward, Infusionsoft will handle Templates the right way. When creating an email in the Campaign Builder, you can save it as a Template. You can also "Use a Template" to get started with an email.

Templates will save you a LOT of time in the Campaign Builder (CB). When you create a new email in the CB, it will start with the default Infusionsoft green template. It takes a few minutes to strip all that stuff out and get it looking the way you want. Do that once, then save that email as a Template so you can start all future emails with that Template and save yourself the trouble of stripping out the default content every time.

Template Categories

Categorizing Templates was *essential* in the Legacy system. So many Templates were created that it got chaotic very quickly. The only way to keep things straight was by categorizing them. But, since Templates were not really templates, but files instead, the categorization got a bit wonky. So most people didn't do it. It just didn't make sense. Typically categories would end up being "Marketing", "Sales", "Customer Support", etc. and those categories weren't functionally helpful.

Now that Templates are being used correctly in Infusionsoft, you should certainly categorize them. In the new system, you can avoid confusion with Templates by using categories that make sense. Here's what I recommend:

Default Templates (used in Template Defaults - see below)
Branded Marketing Templates (full HTML with logo, etc. that Marketing uses)
Plain Marketing Templates (HTML styled to look like plain text)
Sales - From Rep (HTML formatted to come fro sales rep)
Sales - Generic (HTML emails sent from the company)

Plain Text
etc.

Hopefully you can see where I'm going with this. Basically you want to categorize them based on function and layout. This helps the user understand exactly what's in each category. Now templates are more about the layout, design, who it's from, who it's for, etc. than the content. In the Legacy system the content of the emails was the biggest factor in categorization.

Within your appropriate categories, you'll have templates for different uses. For example, in the "Sales - From Rep" category I might have a Template that is formatted with the sales rep's signature to look like it came from Outlook. I might also have another Template that is a branded email with the logo and background color that also has the sales rep's signature inside. I can create a Template with social share links and one without. Again, Template categories are helpful in organizing Templates by layout & function, not content.

Template Naming Conventions

Naming Templates now follows the same logic as the categories. In the Legacy system, I used to define naming conventions like this:

Partner Name – Event Name (date) Segment
ie: John Smith – Lead Gen Webinar (4.21.11) Invitation
ie: Business Blueprint Webinar (5.13.11) Replay

You'll notice that the focus of the naming is on the content. As with Tags, be sure to use the most easily remembered identifier first (in this case, the partner name or event name) because you can sort your list of Templates alphabetically. Of course, you can also search by those names. That still makes sense if you're using Legacy features. But, if you're using the Campaign Builder, your emails will be contained within the campaigns - right where they belong - without cluttering up your list of Templates. Beautiful! So, there's no need to worry about naming each of those emails appropriately. I'd still change the labels of each email in the Campaign Builder so you remember exactly what's in each email.

Even so, be verbose in your naming of your templates. Devise a naming convention that helps you identify exactly what the template is all about. I would do something like this:

From - Style - Function
Sales - HTML Branded - Pipeline Automation
Marketing - Plain - Optin Follow Up

What's important is for you to develop a system that makes sense for you.

Template Pruning

Now that we've determined that you're likely to have a TON of junk in your Template library (especially if you've been using Infusionsoft for a while or if you're using the Legacy features), it's time to do a bit of clean up.

On each email Template there is a tab for Categories & Follow-up Sequences. Go to that tab to first determine if the Template is being used in a Follow-up Sequence. If not, and you're sure you don't need that email anymore, go ahead and delete it

"But what if I want that Template for future reference?"

If that's the case, either save the copy in a Word doc and save that in a place where you can find it, or send it to a contact record you use for storing old template data - it will be stored in the email history forever (as long as you don't delete that contact). Either way, there are certainly better ways of keeping the info.

If you're not using Legacy features, you probably only need to do this clean up job once, and then again once a year or so just briefly. If you're continuing to use Legacy Follow-up Sequences, you'll need to do this at least once every 6 months.

Tip: Prune your Follow-up Sequences FIRST. This will ensure that any Template being used by a Follow-up Sequence is orphaned when the Sequence is deleted. Then when you prune your Templates, it will clearly be unused by old Follow-up Sequences and you'll know it can be deleted.

Template Defaults

In Marketing ⇒ Settings ⇒ Template Settings ⇒ Template Defaults you'll find a few settings that are interesting.

Default User is the User record that will be used in the absence of an Owner. For example, if you have emails that are sent to leads on behalf of their assigned sales rep (Owner), Infusionsoft will use the Default User as the Owner if the Owner is not assigned.

This is also the record that is used whenever you are previewing an email template and it automatically merges in Owner record information.

Below that, you'll see links for the different record types. When you click on those links, a window will open where you can define the default values for the merge fields. For example, let's say you want to merge the contact's first name into an email: Hi ~Contact.FirstName~, but some of your contact records don't have first names. Well, you can define the default

value of ~Contact.FirstName~ as "Friend" so that your email ends up saying "Hi Friend" in the case that a record is missing the first name.

Email Defaults

In Marketing ⇒ Settings ⇒ Template Settings ⇒ Email Defaults you'll find drop downs where you can define the starting templates for broadcasts, sequences, single emails, etc. This can be a time saver.

Default Thank You Pages

In Marketing ⇒ Settings ⇒ Marketing Settings ⇒ Default Thank-You Pages you'll find two HTML areas where you can define the default thank you pages for web forms and automation links. Again, big time savers if you're using these features.

Lead Sources

Lead Source tracking is one of my favorite features in Infusionsoft. If you haven't yet read my post on this topic, do it now (http://www.tylergarns.com/infusionsoft/infusionsoft-lead-source-tracking/). You'll thank me later.

Before we get into this, let's get a few things straight:

By definition, Lead Source is the only field in the contact record that will not get overwritten with new web form data. For example, if a lead comes in and the Lead Source is set as Google, the Lead Source will not change to Facebook if the person returns from a link on Facebook and fills out a form.

Lead Source captures the ORIGINAL source of the lead, not the most recent activity. This is purposeful. You want to be able to track where your leads (customers) came from originally so that you can go find more of them (if they are profitable).

Speaking of profitability...Infusionsoft has a great system for adding expenses to lead sources for tracking overall expenses and REVENUE back to that Lead Source.

Knowing which sources are making you money and which sources are wasting your money is one of the most valuable things Infusionsoft can do for you. If you're not using this feature, you're missing out big time.

Implementing Lead Source Tracking

I'm not going to go into this in detail here. It's a bit too complicated, and I've documented everything here. But, you should know this: Infusionsoft's new Web Visitor Tracking will automatically set the lead source in your web forms. This is great except you can't define those sources on your own. And, you can't distinguish paid traffic from organic traffic. So, it's not helpful for those people trying to really understand ROI. Therefore, you need to implement an additional Javascript or server-side script that does the job for you. You can get my script for free here (http://www.tylergarns.com/infusionsoft/infusionsoft-lead-source-tracking/).

Lead Source Categories

Categories are new to the Lead Source function in Infusionsoft. This feature was added in the Spring 2012 Release. This is a great development! Now, instead of using additional custom fields or coming up with lengthier names, we can store the category data here as well.

In my opinion, it is best to use the Lead Source Categories in the same way that Google Analytics uses "medium". Google Analytics tracks the "medium" of all traffic as organic, referral, paid, cpc, etc and user-defined values. In fact, if you use the script I linked to above, it will actually capture the value of the Google Analytics medium and store it in a custom field. Even better would be to store it as the Category. I'll update it soon.

As of Release 25 (Summer 2012) you can now pass the Lead Source and the Lead Source Category into Campaign Builder Web Forms dynamically. This is really exciting news!

Lead Source Naming Conventions

Now that the Lead Source Category (medium) can be stored separately, Lead Source names don't need to be so long.

But, my opinion is that you want to track every individual marketing effort in order to determine it's ROI. Therefore you should have a Lead Source for every individual effort. That creates a lot of Lead Sources when you're working hard. So, some organization is needed.

My preferred naming convention is like so:

Vendor-AdType/Size-Date-Content

ie.WPN-152x252July2011-img
ie. WPNVideo-Solo-2-1-11-img

Let me decode a bit. WPN stands for WebProNews (a publishing site). 152x252 is a standard banner size. img stands for Internet Marketing Guide (a free report). Solo stands for solo email advertisement. The above are real Lead Sources we used while I was running the Marketing show at Infusionsoft.

When doing a split test, I'll take the Lead Source to one more level by doing this:

WPN-152x252July2011-img-a
WPN-152x252July2011-img-b

That way I can distinguish the ROI/results of the two versions of the test individually.

Lead Source Expenses

Whenever you spend money on any kind of marketing activity, you should always enter the expense of that activity in the Lead Source.

I would argue that you should do so even when you only invest your time. For example, the true ROI of social media can be tracked. Just determine your own hourly wage. Let's say its $50/hour. If you spend 20 hours per month doing social media marketing, the cost is $1,000. Enter that $1,000 as an expense for that Lead Source.

Lead Source ROI

When expenses are entered into Lead Sources, Infusionsoft will automatically calculate the ROI of the lead source by measuring the revenue generating by the Lead Source against the expenses incurred. This is AMAZING when you take the time to set it up.

No longer do you have to guess which marketing activities are making you money. Infusionsoft tells you. And it tells you exactly how much money you're making or losing on each marketing activity (Lead Source).

Fulfillment Lists For Direct Mail

There are three different ways to trigger fulfillment in Infusionsoft. In this section I'm referring to fulfillment LISTS, which are different from fulfillment REPORTS. Fulfillment Lists only contain contact data. They cannot contain order data. That's what Fulfillment Reports are for.

Fulfillment Lists are generally used for direct mail. Currently they can only be triggered from Legacy functions. They are not yet available in the Campaign Builder. Fulfillment Lists are created by going to Marketing ⇒ Templates ⇒ Add a Template.

There are two different types of Fulfillment Lists, regular Fulfillment Lists and Queued Fulfillment Lists.

Fulfillment Lists get emailed to an email address with an attached .csv file. These are used when sending fulfillment to an outside vendor

Queued Fulfillment Lists get assigned to an Infusionsoft User and show up on their dashboard. These are used for internal fulfillment. They also have some workflow tracking, which is nice.

LEGACY

When Infusionsoft was first released, it was so far ahead of its time that most people didn't even understand what it was all about. In those early days, user experience wasn't as focused up on as it is now. The Legacy features still carry on some of that lack of elegance. Luckily, Infusionsoft is making huge strides in the user experience area. Most long time users of Infusionsoft would argue that Infusionsoft really isn't that confusing once you get familiar with it. The last few years have brought a lot of improvements, but the most recent improvements such as the Campaign Builder are bringing elegance and sleekness to the powerful Infusionsoft system.

Currently the Campaign Builder cannot accomplish all the tasks of the Legacy system. So, it is important to be somewhat familiar with the nuances of Legacy features. And, if you're a long time user, the tips below will help you better manage your Legacy Sequences and Web Forms.

Follow-up Sequences

Follow-up Sequences revolutionized small business marketing a few years ago. Infusionsoft was the first to offer adaptable email autoresponders (Folllow-up Sequences) for small businesses. The Campaign Builder offers the newest way to execute complex automated sequences for communicating with your prospects and customers in a targeted manner. But, if you're a Legacy user or if you need to do some of the things that the Campaign Builder cannot yet do, you'll need to understand Follow-up sequences.

Follow-up Sequence Categories

Like most records in Infusionsoft, Follow-up Sequences can be categorized. In this case, the categorization is not just for organization, there is a function as well. Let's suppose you have 5 different lead generation sequences that lead prospects to the sale. When someone makes a purchase, you want to stop all 5 of those sequences. You can set up your purchase action to stop all 5 of those sequences, OR you can set up your purchase action to stop the entire category of prospect sequences. There is an important distinction. On the surface, they do the exact same thing. But, what if next week you decide to add a 6th sequence? You'd have to remember also to go edit your purchase actions and include that sequence in the list of those that get stopped. But, if you've categorized your sequences correctly, and you've set up your purchase action to stop all sequences in the category, you don't have to remember to update your purchase actions when you add a new prospecting sequence.

Therefore, it makes sense to set up your sequence categories in relationship to goals, similar to how the Campaign Builder works. All sequences that lead to the same ultimate goal should be in the same category. That way, when the goal is achieved, the entire category of sequences can be stopped.

Follow-up Sequence Naming Conventions

Similar to other records previously mentioned, I prefer to name Follow-up Sequences in the following manner:

Partner Name – Event Name (date) Purpose

ie: John Smith – Maze Webinar (4.21.11) Reminder
ie: Business Blueprint Webinar (5.13.11) Event Follow Up

You'll notice that the naming convention is the same for Follow-up Sequences, Templates, and Tags. That's important. This helps you know what goes together. In the Legacy system there was no "container" record that held elements of a campaign together. This can be achieved by using the same naming conventions.

Follow-up Sequence Pruning

Like other records, Follow-up Sequences should be pruned on a regular basis. It is very common to create a Follow-up Sequence for an event specific purpose. In those cases, once the event has passed the Follow-up Sequence should be deleted.

If you're worried about the content being lost, store it elsewhere - in a Word doc, send the steps to a contact record, etc.

If you have an event that is repeated on a regular basis, genericize the sequence and save it as a 'template'. Of course there is no such thing as a Follow-up Sequence template. What I mean is just keep it there so you can clone it every time the event is repeated.

When and Why To Switch From Legacy

Many have wondered if they need to switch to the Campaign Builder right away out of fear that the Legacy features are going to suddenly disappear. I don't have a crystal ball. I don't know when the Legacy features will go away. But, I don't believe that will happen until well after the Campaign Builder can accomplish everything that the Legacy system can accomplish and more. I'm sure Infusionsoft will give plenty of warning.

With that said, I think it's smart to start building all new campaigns in the Campaign Builder. New features are being released in the Campaign Builder all the time - that's where the focus of development is. And, building things the first time in the Campaign Builder will save you the trouble of having to switch them from Legacy later.

Webforms

If you have existing Legacy web forms on your site right now, there is no urgent reason to switch. If you are interested in utilizing the Campaign Builder, you can trigger sequences in the Campaign Builder with the "Tag Applied" goal (or, as I like to call them, Tag Listeners), which can be applied in your Legacy forms. Just be sure to mark your goal as an entry point.

When you are ready to actually switch the code on your site and replace Legacy forms with Campaign Builder forms, be sure to also update any lead source tracking script you may have in place or any other client-side script you have running on those forms. The field names in the Campaign Builder web forms are different than the field names in the Legacy forms, so scripts will break if you don't update them.

Follow Up Sequences

If your current Follow-up Sequences generate Fulfillment Lists or utilize Fax Templates or Voice Broadcast Templates, you'll need to continue using the Legacy Follow-up Sequences.

If your sequences are strictly comprised of Email, Notes, Tasks, Opportunity Records, and HTTP Posts, you can switch to the Campaign Builder.

Templates

If your Email Templates were custom coded (meaning that you didn't use the WYSIWYG HTML builder in Infusionsoft to create them, but instead you inserted your own HTML), you'll want to continue using the Classic Builder. In the Campaign Builder there is no way to insert your own HTML for your entire email. You can insert an HTML snippet as a portion of the email, but you can't dump an entire HTML email in there.

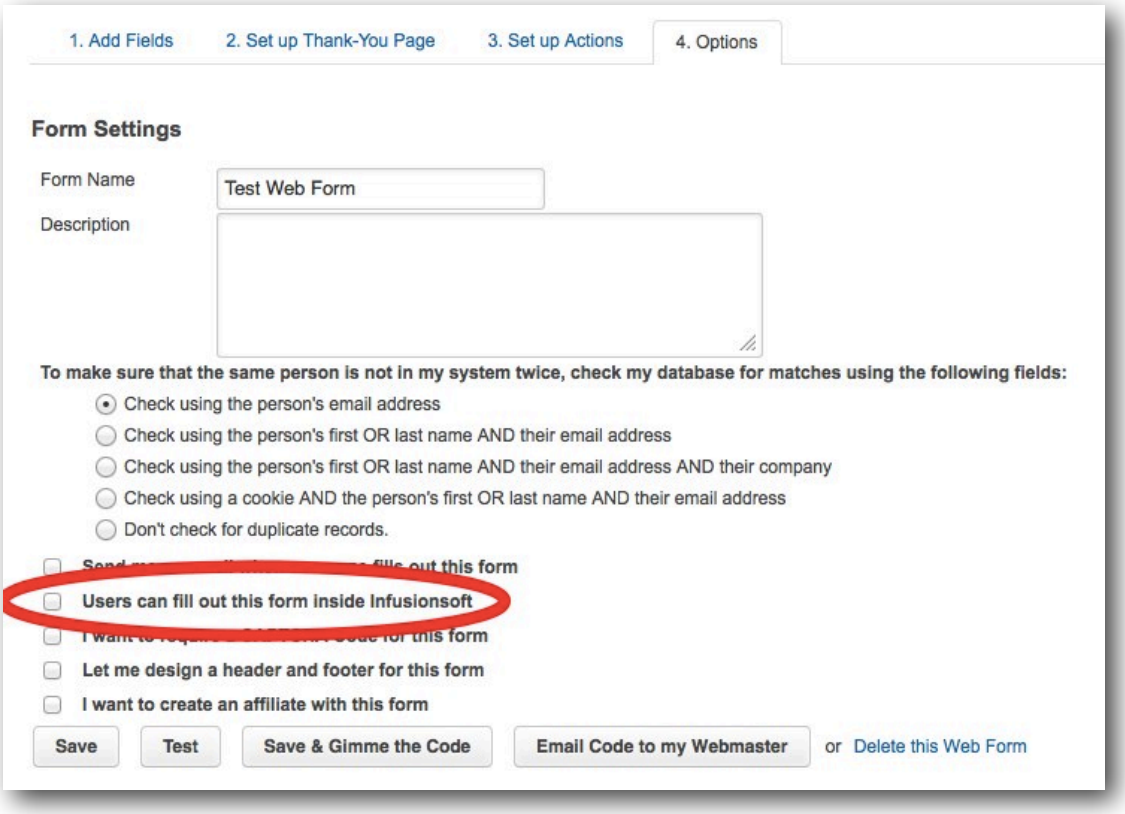
Internal Web Forms

In Legacy Web Forms there is a setting that allows you to enable the Web Form as and "internal Web Form. The setting is a checkbox that says "Users can fill out this form inside Infusionsoft". This setting makes the form available when adding new contacts to the system or when updating contacts through the "Fill out a webform for this contact" option in the Contact record. The Web Forms in the Campaign Builder do not have this option.

If you need to utilize "internal" web forms for improving workflow, use Legacy Web Forms.

If you're wondering why you would ever use this feature, let me give you an example. Let's say you do direct mail and you have someone call in to request a freebie you've offered. The rep answering the phone can quickly and easily add the person through the "internal" Web Form and the form will run all appropriate actions (tagging, sending emails, starting sequences, etc). This saves the rep a lot of time.

In another scenario, an existing customer might call in and request some information be mailed to them, but they need to update their address since they've moved. If an "internal" Web Form has been set up to handle that request, the rep can easily update the record and trigger the fulfillment with just a few clicks.



E-COMMERCE

Promos, Discounts, & Trials

Infusionsoft has a very powerful system for offering customized Promos, Discounts, and Trials. If you haven't looked into this, take time now to do so. Specific upsells can be offered in the Shopping Cart based on certain products that have already been added to the cart, based on date ranges, based on the quantity of a product in the cart, and many other factors. If you're using the Shopping Cart and you're not using it's upselling capability, you're leaving money on the table.

Maintenance

If you're setting up a lot of Promos, Discounts, and Trials, managing them can get a bit unwieldy. The problem is that you have two fields available: the name, and the description. Both of those will actually show up in the Shopping Cart. So, you can't exactly put your own notes there reminding you when to remove them and things like that. This is a perfect time to utilize Infusionsoft as your "Secretary" and create a task to remind yourself to delete a promotion on a specified date.

If you don't like that method, you can utilize the Description field. If offers are time sensitive, then it makes sense to the customer to see a note in the Shopping Cart that says "Offer good until December 24th, 2012". Using this method, you can display important information to the customer (to create urgency) as well as have a reminder for yourself of when it can be deleted.

In any case, if you use promotions a lot, you'll want to define a schedule (I'd recommend every 3-6 months) when you prune the list of old promotions.

Products

Product Categories

Product Categories are useful for three things:

1. Helping you and other Infusionsoft users find products if you have a long list
2. Displaying products by category in your storefront
3. Accessing specific product data by category via the API

If none of those scenarios apply to you, you can ignore Product Categories.

If those scenarios do apply to you, then just make sure you create categories that make sense to you and your customers. Pretty basic. ☺

Inventory Tracking

Infusionsoft CAN do Inventory Tracking. It's very basic. And, you have to update inventory manually. But, if you're doing fulfillment in house or if you want to know when you should send more inventory to your fulfillment house, you should use the Inventory Tracking feature.

Where it gets tricky....

Infusionsoft will not re-add a product back into inventory when you process a refund. This is because sometimes you'll refund without receiving a returned product. So, if you process a refund, you have two options:

Option 1 is to also remove the product item from the order. Doing this will add it back into inventory.

Option 2 is to go to the product record in Infusionsoft and increment the inventory manually.

I prefer Option 2 because Option 1 does not leave a trail of which product was purchased.

Shopping Cart vs Order Forms

There are two out-of-the-box ways to sell stuff through Infusionsoft, the Shopping Cart and Order Forms. At first glance it can be difficult to know which one to use.

When to use the Shopping Cart:

- You're selling more than one product
- You want to offer dynamic upsells during the checkout process
- You want people to be able to "add products to the cart", continue shopping, add more, and then checkout
- You want to offer discounts through promo codes

- You don't mind if the checkout process is a couple of different steps - enter payment info, choosing shipping options, review order, finalize
- You don't mind if the checkout pages are hosted on your infusionsoft domain - appname.infusionsoft.com

When to use Order Forms:

- You're selling ONE product, ONE subscription, or ONE product AND ONE subscription together as a bundle
- You want the checkout to be streamlined to one step
- You require the checkout page to be hosted on your own site (Infusionsoft hosts Order Forms by default, but you can host them too)
- You want to add sales copy above or below the checkout area on the page

Important notes on Order Forms:
Order Forms currently use the same framework as Classic Web Forms. So, they're a Legacy feature. Capturing lead source and things like that need to follow the same process you'd use for Classic Web Forms. Order Forms will accept promo codes for tracking purposes only - they will not apply promo code discounts.

Billing Automation

Billing Automation is currently dependent on Action Sets (Legacy feature), but you can easily bridge to the Campaign Builder by applying tags and using "Tag Applied" goal methods in your campaigns to trigger the appropriate sequences. If you need to do direct mail for collections, use Legacy Follow-up Sequences.

Order Settings

Order Settings (found in E-Commerce ⇒ Settings ⇒ Order Settings ⇒ Orders) can be a bit confusing. There are a LOT of settings. Below I'll review a couple of the more troublesome settings.

Invoices vs. Receipts

Infusionsoft can send Invoices and Receipts. If you check the setting "Email invoices upon successful payment", then an Invoice will be sent any time a successful purchase is made. This may not always be the desired result. The default Invoice template says "INVOICE"

at the top. That's only appropriate in a business that invoices clients. Check this setting as "yes" if you want to send an Invoice that shows payment was received when a purchase is made.

If you want to send Receipts, as in typical retail sales, then leave the "Email invoices upon successful payment" option selected as "no", then go to E-Commerce ⇒ E-Commerce Settings ⇒ Payment Options ⇒ Receipts. Check the box that says "Email a receipt to customers after they buy". Then you'll be able to customize your receipt.

Payment Types & Reporting

I've heard many customers express frustration with the inaccuracy of Infusionsoft's financial reporting. First, let's just agree that Infusionsoft is NOT an accounting system. It will never replace the need for QuickBooks or some equivalent accounting package. But, understanding how it works will help you get data out of it that reconciles much better with your bank statements. Most of the financial reports in Infusionsoft are not filtered by Payment Type by default. This is important because when unfiltered, the reports include Credits, Refunds, etc. That's the main reason behind the frustration. It's easy to go into the criteria for the report and select the Payment Types you wish to include or exclude. By doing this you should be able to get the data to be pretty accurate. In the Order Settings area you can also add additional Payment Types. This is important if you really want to leverage the reporting capability of Infusionsoft and fine tune the data you get out of it.

Fulfillment Reports

Fulfillment Reports are different from Fulfillment Lists (both kinds - see the section on Fulfillment Lists). Fulfillment Reports are used specifically to fulfill on purchased items. The Report generated contains contact information, shipping address, as well as order item information and quantities. A .csv file is emailed to the person/company doing the fulfillment. They process fulfillment, but there is no automated way to mark fulfillment as complete or to enter shipping tracking numbers. Those things need to be done manually or through the API.

DASHBOARD REPORTING

The Infusionsoft Dashboard is becoming an extremely powerful tool for Infusionsoft Users. If you haven't yet familiarized yourself with all of the Dashboard Widgets that are available to you, do so now.

Most of the frustrations around Infusionsoft reporting can be alleviated now through reporting on the Dashboard. The following sections will explain how to achieve the reporting detail you need.

Saved Searches & Reports

The first step to getting solid Dashboard reports is to define the data you need and then go get it through a Search or a Report. In many cases you don't need to worry about getting the *exact* data in the Search or Report, you just need to get close. For example, if a Report doesn't have a "Total" at the bottom and you're looking for the "Total" amount in a particular column, don't fret. We'll solve that problem next. If you're looking for an "average", no worries. Just get a Search or a Report that *contains* the data you need to arrive at the value you seek. Be sure to SAVE the Search or Report first, then go to your Dashboard and add a Little Box O' Stats.

Little (Best Friend) O' Stats

The Little Box O' Stats is the report seeker's best friend. Before we get into the details, let's just cover a couple of things about the Little Box O' Stats (LBOS). A LBOS can only hold 10 stats. But, no worries, you can add as many LBOSs to your dashboard as you like (at least I haven't hit the limit yet). You can also rename LBOSs. Create a LBOS for each of your functional areas - it's actually kind of fun and rewarding. I have a LBOS for my affiliate activity (how many affiliates, how much I owe, how much I've paid out, etc). I have a LBOS for my high level financials (gross revenue, net revenue, monthly sales, etc.). I have a LBOS for each of my sales pipelines, and much more.

To best utilize the LBOS, and to better guide you as you're looking for data in Searches and Reports, it's good to understand the kinds of numbers you can pull into a LBOS. Go into a LBOS and click "Add your first stat" or "Add another stat". The first option you have is the 'kind', or type, of stat. You can choose between the following:

COUNT: Shows the number of records in a Search or Report (number of rows)
SUM: Shows the sum of a column you choose in a Search or Report
AVERAGE: Shows the average of the values in a column in a Search or Report

MAX: Shows the maximum value in a column in a Search or Report
MIN: Shows the minimum value in a column in a Search or Report

Knowing this helps you understand how to generate Searches and Reports to get to the data you need. Even though the Search or Report might not show the value you're looking for, you can often get it into a Little Box O' Stats.

Golden Activity

The Recent Activity widget is a "nice to have" for strictly online businesses. But, it's an extremely powerful tool for service based businesses and businesses that have a high-touch sales process. I know of some Infusionsoft users that use the Recent Activity feed religiously. Every day (sometimes even multiple times a day) they will scan through the feed and find people who have taken recent action. They'll pick up the phone and call those people. Watch your sales skyrocket when you start having conversations with your prospects within minutes or hours of them opening an email or clicking a link to your site. When your product or service is already on their mind, you've got a good shot.

Tasks & Workflow

Infusionsoft can be used in MANY ways to automate your repetitive tasks and workflow. Handling incoming requests and outgoing tasks is a cinch with Infusionsoft. But rarely do I see customers using Infusionsoft to automate their "internal" workflow. Look through your business and find areas where you can automate your tasks and save time. Use Note Templates and Task Completion Scenarios to automate your repetitive work.

Note Templates are generally best used in response to an unexpected customer request. i.e. Someone calls in and asks for a copy of your free report.

Task Completion Scenarios are best used in predefined tasks. i.e. On day 10 of your prospecting sequence you want a sales rep to call the prospect and call in. Task Completion Scenarios will automatically trigger the right actions based on the outcome of the call. Very handy.

Once you have these things up and running, use the Appointments Dashboard widget to stay on top of those tasks right from your Dashboard. And, don't forget to add the Fulfillment Jobs widget if you're doing fulfillment in house.

TIPS & TRICKS

Advanced Searching

Positive and Negative Searches

To search for records that DO have an email address (or any other field), select "Contains" and enter an underscore "_" in the search field. This only works from the "People – Find People" menu search.

To search for records that DON'T have an email address (or any other field), select "Doesn't Contain" and enter an underscore "_" in the search field. This only works from the "People – Find People" menu search.

Hot Keys

I'll admit, I'm addicted to hot keys. I revel in the fact that I can do most things on my computer 10 times faster than the average person - mainly because I rarely touch my mouse - I do everything with hot keys. Investing the time to learn the hot keys in Infusionsoft will help you get more done in less time.

Quick Search

Infusionsoft Quick Search is in the upper right hand corner of your account. The Quick Search feature will help you find Contact, Company, Task/Appt/Note, Order, Subscription, Opportunity, and Referral Partner records in a flash. Learning to navigate in and out of Quick Search and within Quick Search with hot keys will save you countless hours over time. Here are the hot keys you should know:

Control-Q will move your cursor to the quick search field.
Control-Downarrow will scroll through the quick search options.
Using only part of the names will help you search faster. i.e. Ty Ga will find Tyler Garns and all other variations.
Wildcard – Use * as a wildcard. T* Garns will find Tyler Garns and Tanner Garns. * Garns will find anyone with the last name Garns.
Email – Any search with an @ will be treated as a search by email.
Numbers – Any search with numbers will be treated as search by phone number.

Date Fields helpers

Date fields are available in most searches and reports. Clicking on the date picker and picking dates in the future and in the past is painfully slow. The hot keys below will help you select dates almost instantly without lifting your fingers from the keyboard.

The hot keys look random, but there is some logic: "t" is for Today. Look at the word **m**ont**h**. "m" moves forward one month. "h" moves backwards one month. Etc.

You'll end up stringing them together. For example, if I wanted to select the first day of last month, I would type the following keys in succession:

t, h, f

"t" gets it started with today's date. "h" moves us back one month. "f" jumps to the first day of the month that is currently selected.

Here are the hot keys for your enjoyment:

i: See all quick keys
t: Set date to today
= : Add one day
+ : Subtract one day
w : Add one week
k : Subtract one week
y : Add one year
e : Subtract one year
m : Add one month
h : Subtract one month
q : Clear the date
f : Go to the first day of the month
l : Go to the last day of the month
z : Go to Monday of the week selected
x : Go to Tuesday of the week selected
c : Go to Wednesday of the week selected
v : Go to Thursday of the week selected
b : Go to Friday of the week selected

SUMMARY

The list of ways to use Infusionsoft for your benefit is never-ending. Hopefully this guide has given you ideas on how you can use it more effectively. But, this guide cannot contain all of the strategy necessary to answer some of the tougher questions you'll face. For that reason I've created a membership site called The Virtual VP of Marketing. This membership site is full of an ever-growing library of video tutorials that answer more of the "how" questions and the strategy questions you're bound to encounter.

Sign up for The Virtual VP of Marketing now and get immediate access to the videos you need to leverage Infusionsoft even further.