The IS Starter Kit | Course Agenda

IS Starter Kit | Green

IS Starter Kit | Orange

Module 2.1   - How do I import my list of contacts?

Module 2.2   - What do I do with duplicates?

Module 2.3   - How do tags and custom fields differ?

Module 2.4   - How do I create and edit custom fields?

Module 2.5   - How do I add and manage users?

Module 2.6   - How do I set up and configure my profile settings?

Module 2.7   - Where do I go to update my company details?

Module 2.8   - What is the branding center, and how do I use it?

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Module 3.1   - What do I need to know before I set up my tags?

Module 3.2   - How does Monkeypod use tags and tag categories?

Module 3.3   - How do I create, remove, and apply tags?

Module 3.4   - What other CRM settings do I need to know about?

Module 3.5   - How do I search, save searches, and report on them?

Module 3.6   - What other dashboard widgets are available?

Module 3.7   - How do I delete, rename, and share saved searches?

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Module 4.1   - What are templates and how do I use them?

Module 4.2   - How do I send a broadcast?

Module 4.3   - How do I design and build my emails?

Module 4.4   - How do I use merge fields to personalize my emails?

Module 4.5   - How do I edit the images I've added?

Module 4.6   - How do I save and reuse email templates?

Module 4.7   - Email Throttling: How, what and why?

Module 4.8   - Why did my open rates drop, and my spam complaints spike?

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Module 5.1   - What is the campaign builder?

Module 5.2   - What is the API?

Module 5.3   - How do I set up Lead Scoring?

Module 5.4   - How do I use Lead Scoring?

Module 5.5   - What's next for me?

Module 5.6   - How do I run a mass action on a group of people?

Module 5.7   - What do I do with unsubscribes and bounces?

Module 5.8   - How do I use the Marketplace?

Note: This course is designed to evolve as Infusionsoft does.

When possible, or on request, we'll add new modules to cover common questions or new features that Infusionsoft introduces.

This course isn't designed to be groundbreaking, but rather to establish the basic comfort needed to begin using Infusionsoft more effectively.