

# Classic Infusionsoft

**Before & After**

CRM

Find a contact...

**MY NAV**

Start Page

Customize Now

**CRM**

- Contacts
- Companies
- Visitors

**MARKETING**

- Campaign Builder
- Email & Broadcasts
- Lead Generation
- Templates
- Legacy

**ADMIN**


- Branding Center
- Billing & Account Info
- Users
- Import Data
- Data Cleanup
- Stealth

Skip this

started

**Start your first campaign**


Time needed: 5 min



Select and send a beautifully designed email in minutes

Send an Email


Time needed: 5 min



Start adding your contacts so they'll be organized in one place

Add a Contact

Time needed: 5 min



Select a proven, pre-built automation to take care of your customers, day or night

Select a Campaign

Navigation: Before

The image shows a CRM navigation interface. At the top, there is a dark header with a logo, a dropdown arrow, the text "CRM", and several utility icons (home, clock, star, list, user, help). To the right of these icons is a search bar with a magnifying glass icon and the text "Find a contact...", followed by a plus sign icon in a dark square.

Below the header, a navigation menu is displayed with four main categories, each with a green underline:

- MY NAV**
  - Start Page (with a home icon)
  - Customize Now (with a large grey arrow pointing down)
  - Edit (at the bottom)
- CRM**
  - Contacts
  - Companies
  - Visitors
  - Settings (at the bottom)
- MARKETING**
  - Campaign Builder
  - Email & Broadcasts
  - Lead Generation
  - Templates
  - Legacy
  - Reports | Settings (at the bottom)
- ADMIN**
  - Branding Center
  - Billing & Account Info
  - Users
  - Import Data
  - Data Cleanup
  - Stealth
  - Reports | Settings (at the bottom)

In the background, a light grey area contains the text "started" and a button that says "Start your first campaign". A link labeled "Skip thi:" is also visible on the right side.

Navigation: Before

Search Contacts

 Dashboard


 Contacts

 Broadcasts

 Campaigns

 Reports

 Settings

 Tyson Brown  
[Sign out](#)

## Dashboard

### New contacts

Last 7 days

3

### Total contacts

419

[View all contacts](#)



### Send your first email

Time needed: 10 min

[Send an email](#)



### Add your first contact

Time needed: 1 min

[Add a contact](#)



### Start your first campaign

Time needed: 5 min

[Select a campaign](#)



### Streamline your payment process

Time needed: 5 min

[Find out more](#)

Search Contacts

Dashboard

Contacts

Broadcasts

Campaigns

Reports

Settings

T Tyson Brown  
Sign out



## Contacts

Add a Contact

Actions

New Search

Edit Criteria/Columns...

Save...

Print...

Saved Searches...

1-3 of 3

 Tyson Brown 

Id: 2

Company Name:

Email: [tysonb923@gmail.com](mailto:tysonb923@gmail.com)

State:

 Rick Grimes

Id: 6

Company Name:

Email: [colt45@walkers.com](mailto:colt45@walkers.com)

State:

 Bil Nye

Id: 4

Company Name:

Email: [sciencrules@geek.com](mailto:sciencrules@geek.com)

State:

Contact List Page: Before

Dashboard

Contacts

Broadcasts

Campaigns

Reports

Settings

Tyson Brown  
[Sign out](#)

All Contacts 419 Total 0 New today

[Add a contact](#)

[Import](#)

<input type="checkbox"/>	Name <span>↑</span>	Email <span>↑</span>	Date added <span>↓</span>
<input checked="" type="checkbox"/>	Grady Kerr	Grady.Kerr@infusionsoft.com	Feb 21, 2018
<input checked="" type="checkbox"/>	Tyson Brown	tysonbrown@icloud.com	Feb 20, 2018
<input type="checkbox"/>	D Dude Mcduderson		Feb 16, 2018
<input type="checkbox"/>	J James Kredit		Feb 9, 2018
<input type="checkbox"/>	D Deborah Zs.vsdkjf,kasdlf		Feb 9, 2018
<input type="checkbox"/>	J Jessica Rentoll	jrentollax@dell.com	Feb 8, 2018
<input type="checkbox"/>	S Staford Severn	ssevernb1@nih.gov	Feb 8, 2018
<input type="checkbox"/>	O Olivier Aiers	oaiersb2@cyberchimps.com	Feb 8, 2018

2

[Add or remove tags](#)

[Remove](#)

[Send a broadcast](#)

[Add to a campaign](#)



## Tyson Brown [\(back to search results\)](#)

- General
- Address
- Additional Info
- Person Notes
- Tag
- Linked Contacts
- Access Privileges

### General Information

First Name

Last Name

Company

Company

[Go](#) [Search...](#) [Clear](#)

Job Title

Person Type

Lead Source  [?](#)

Owner

### Billing Address

### Score

Lead Score  [?](#)



### Phone / Fax

Phone 1

Phone 2

Fax 1

### Email / Social

Email   

Status: Confirmed [Manage Email Status...](#)

Website



Search Contacts

 Dashboard

 Contacts

 Broadcasts

 Campaigns

 Reports

 Settings

 **Tyson Brown**  
Sign out



**Tyson Brown**

tyson.brown@infusionsoft.com



Details



Note



Tasks



Calendar



Email



Files



Campaigns



Tags

### Contact activity

Today



**Form** submitted by **Katherine Lebouski** 12:45pm

Form name: Free Estimate Request

Referring URL: <https://cc398.infusionsoft.com/app/form/free-estimate-requestbrwebform-submission>

[See form details](#)



**Task** completed by **Lauren Smith** 9:36am

Completed task: Call back and schedule appt for

[View task](#)



**Note** created by **Bill Markly** 7:20am

Had a quick call to update the invoice with new shipping address. He mentioned he wanted to get more informa...

[See note](#)

Yesterday



**Email** sent by **Automated Estimate Campaign** 10:29am

Subject: Attached is the estimate you requested.

# Email Broadcasts

Send a Broadcast



## Email lots of contacts at once

Reach a wider audience and improve your ROI with email broadcasts. Quickly create and send email broadcasts with customizable templates and a handy drag-and-drop tool.

Send Email

No Thanks

Actions | New Search | Edit Criteria/Columns... | Save... | Print... | No options available

0-0 of 0 | 50 per page

Date	Email Subject	Sent By	Status	Report	Sent	Open Rate	Click Rate	Opt-Out Rate	Bounced
------	---------------	---------	--------	--------	------	-----------	------------	--------------	---------

No results to display

Broadcast Page: Before

## Sent broadcasts

Create a broadcast

### Save 30% on all orders!

2,698 Opens

83.0%

1,449 Clicks

44.6%

Status	Sent on	Total sent	Recipients
Stopped by user	Dec 14, 2017 6:43 AM	3,252	Hot leads New import

### Save 30% on all orders!

3,252 Opens

100.0%

1 Click

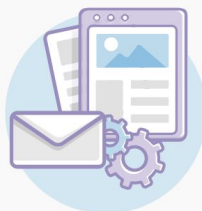
0.0%

Status	Sent on	Total sent	Recipients
Sent	Dec 14, 2017 6:43 AM	3,252	Hot leads New import



## Campaigns

[Go to the Strategy Guide](#) [Create my own Campaign](#)



### What are other businesses like yours doing to be successful?

Achieve your business goals with ready-to-use sales and marketing automation designed for your small business. Visit our Small Business Strategy Guide to find solutions you can implement today!

[Go to the Strategy Guide](#) [Create my own Campaign](#)

[No Thanks](#)

Search

Category

[Manage Categories](#)

0-0 of 0  per page

Id	Name	Categories	Active Contacts	Published Date	Error msg	Time zone	Published time zone
----	------	------------	-----------------	----------------	-----------	-----------	---------------------

No results to display

Search Contacts

Dashboard

Contacts

Broadcasts

Campaigns

Reports

Settings

T Tyson Brown  
Sign out

My campaigns [Explore strategies](#)

## Explore strategies

Follow-up

Capture leads

Convert sales

Search all

Recommended strategies



Install

### Initial Coupon or Discount

Author

Pair your newsletter or list sign up with a coupon or initial discount and start seeing the leads flood in!



Install

### Social Media Giveaway

Author

Promote a giveaway to your social media following, collect leads, and then send a special offer!



Install

### Free Tips Guide

Author

Offer a free tips guide to give your prospective customers ideas and capture leads in the process!



Install

### Birthday Club Sign-Up

Author

Invite your list to sign up for your Birthday Club to



Install

### Initial coupon or discount offer

Author



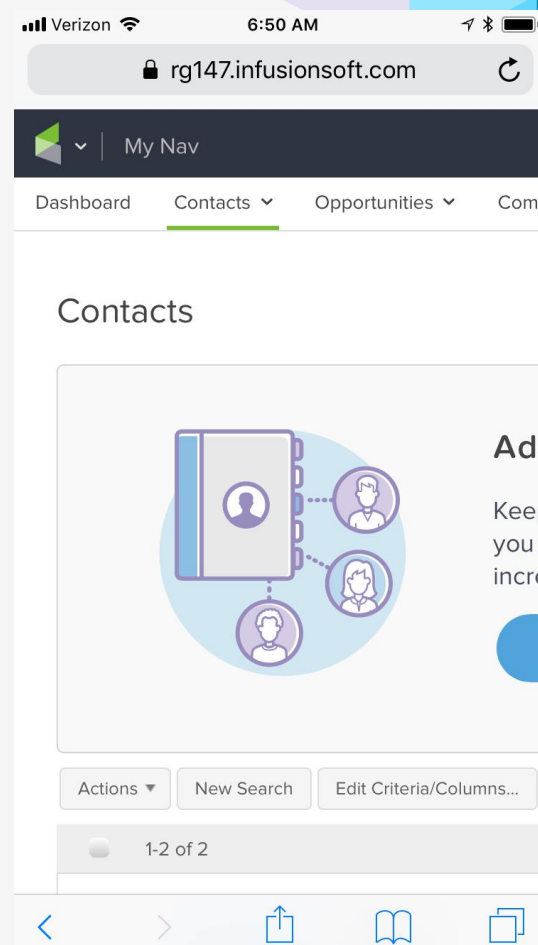
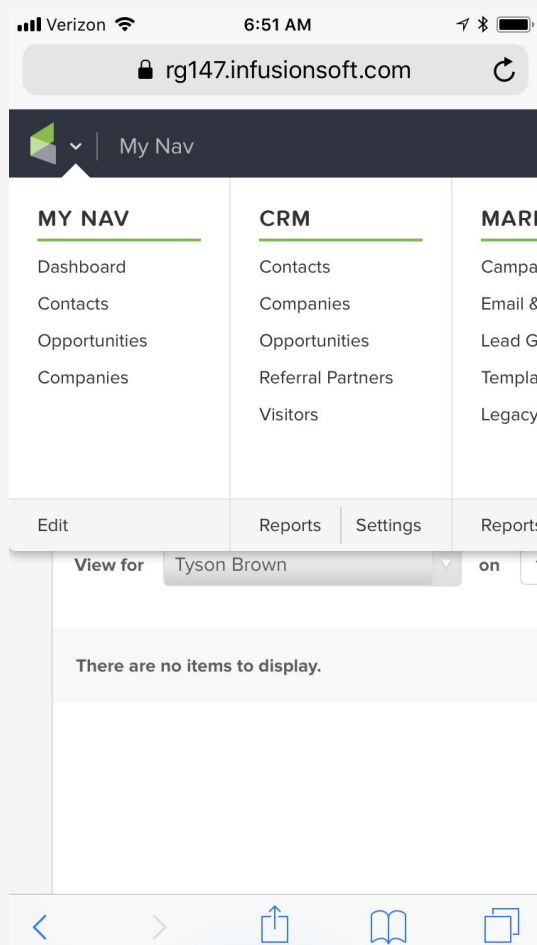
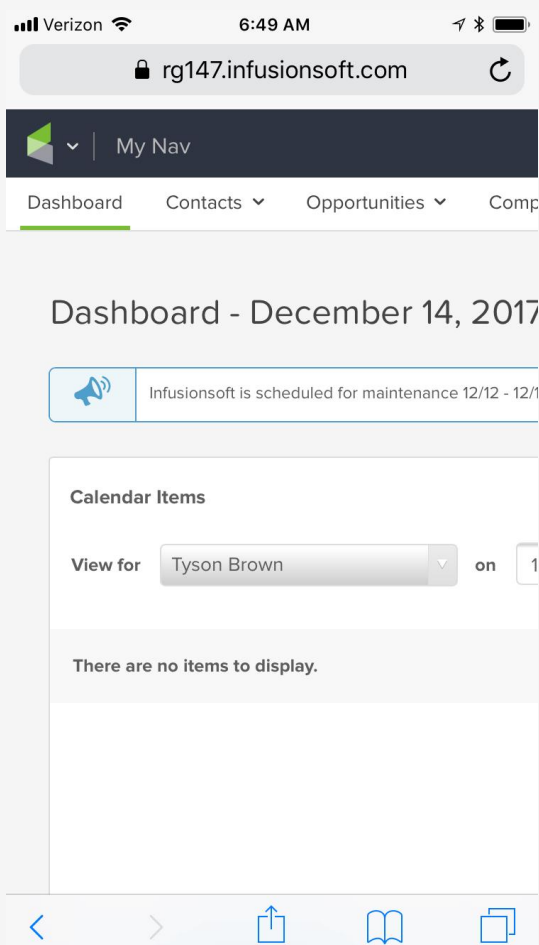
Install

### Flash Sale

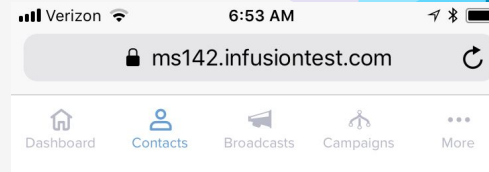
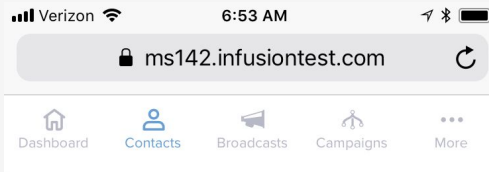
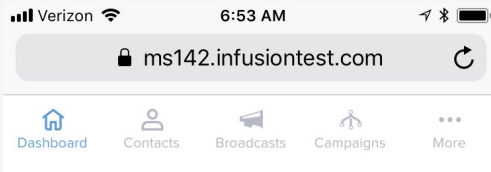
Author

Run a quick 3-day promotional offer to your





On Mobile: Before



On Mobile: After

### Order Items

Calculate Tax

Add Order Item

Name	Price/Unit	Type	Total Price	Remove
Product A	\$100.00 x 1	Product	\$100.00	<a href="#">Remove</a>
<b>ORDER TOTAL</b>			<b>\$100.00</b>	

### Payments

Add Payment

Refund Payment

Date	Type	Status	Amount	Note
<b>Payment Total</b>			<b>\$0.00</b>	
<b>BALANCE</b>			<b>\$100.00</b>	

### Payment Plan

Edit Payment Plan

Auto Charge: Yes [\[View Payment Attempt History\]](#)

Email the invoice to the customer upon successful payment

Pmt #	Status	AmtDue	Paid	Date
Pmt 1	Unpaid (Auto)	\$100.00	\$0.00	2/28/2018

Save

Save & Search

Delete

Preview Invoice

Send Invoice

Clone

# Create an Invoice: Before





Bob Mason Coaching  
189 S Baker St.  
New York, NY 83678

Invoice #1123  
Feb 2, 2018

Billed to

**Katherine Lebouski**  
Acme Inc.  
2366 N Halifax Dr.  
New York, NY 83697

Due by

**March 2, 2018**

Total due

**\$2,072.88**

Description	Rate	Quantity	Amount
✚ Custom business success coaching per hour <small>Includes start up and 1 on 1 sessions. Hourly rates are calculated in whole hour increments.</small>	\$120.00	14	<b>\$1,680.00</b>
✚ On the road to success (book) <small>On the road to success, paperback by Bob Manson.</small>	\$32.88	1	<b>\$32.88</b>
✚ On call service request	\$180.00	2	<b>\$360.00</b>
<a href="#">+ Add a line item</a>			

*** Subtotal	<b>\$2,072.88</b>
Tax	<b>\$165.83</b>
Total	<b>\$2,072.88</b>
Amount paid	0.00

Notes: Add a note (optional)

Terms: Add terms (optional)

**Total due \$2,072.88**

Send

Save as draft

# Create an Invoice: After

NO information is available

https://td322.infusionsoft.com/app/payment/prepareAddPaymentForInvoice?invoiceId=6&Payment0Co...


Secure | https://td322.infusionsoft.com/app/payment/prepareAddPaymentForInvoice?invoiceId=6&Pa...

## Enter a Payment

Current Amount Due: \$100.00

Remaining Balance: \$100.00

Amount:  \$

Date:  

Payment Type:

Notes:

Apply to Commissions:  Yes  No

2

Unpaid (Auto)	\$100.00	\$0.00	2/28/2018
---------------	----------	--------	-----------

Process a Payment: Before

### ✕ Add a customer payment

Payment from  
Katherine Lebouski ✕

Payment received on  
Feb 12, 2017

Payment reference

Payment amount  
\$0.00 USD

Payment type

**Add** **Cancel**

### ✕ Add a customer payment

Payment from  
Katherine Lebouski ✕

Payment received on  
Feb 12, 2017

Payment reference

Select an invoice >

Select a product >

Add a payment description

**Add** **Cancel**

### ✕ Add a customer payment

Payment from  
Katherine Lebouski ✕

Payment received on  
Feb 12, 2017

Payment reference

Payment amount  
**\$289.00** USD

Payment type  
Credit card

Use Katherine's card on file

Name on card  
Katherine Lebouski

Card number

Expiration  
MM/YY

CCV

Postal code  
89663

Store this card on file for later use

This is a recurring subscription

Katherine's card will be charged **\$289.00**.

**Add** **Cancel**

# Process a Payment: After

## Opportunities

Add an Opportunity



### Increase productivity and close deals faster

Add Opportunities to automate your entire sales process and manage prospects throughout the sales lifecycle.

Add an Opportunity

No Thanks

Actions ▾

New Search

Edit Criteria/Columns...

Save...

Print...

No options available

1-4 of 4



**Opportunity** Anthony's wedding

**Next Action Date** 7/20/2017 1:00 PM



**Opportunity** new event

**Next Action Date** 12/1/2017 10:30 AM



**Opportunity** New opportunity

**Next Action Date** 12/20/2017 4:30 PM

# Pipeline: Before

# Sales Pipeline

Appointment Scheduled (12) Total: \$19,000	Qualified to buy (3) Total: \$19,000	Estimate Scheduled (22) Total: \$19,000	Contract Signed (5) Total: \$19,000	Payment made (3) Total: \$19,000
<p>Wilson Project Close date: Sep 19, 2017 \$2,400</p>	<p>Wilson Project Close date: Sep 19, 2017 \$2,400</p>	<p>Willright Project Close date: Jul 24, 2017 \$2,400</p>	<p>Pitt Project Close date: Jul 24, 2017 \$2,400</p>	<p>Wilson Project Close date: Jul 24, 2017 \$2,400</p>
<p>Markly Project Close date: Oct 28, 2017 \$1,400</p>	<p>Markly Project Close date: Jul 24, 2017 \$1,400</p>	<p>Bill Smith Project Close date: Feb 8, 2018 \$1,400</p>	<p>Markly Project Close date: Sep 19, 2017 \$1,400</p>	<p>Markly Project Close date: Oct 28, 2017 \$1,400</p>
<p>Tom's Hardware Remodel Close date: Aug 12, 2017 \$8,400</p>	<p>Jen Wang Close date: Sep 19, 2017 \$8,400</p>	<p>Tom's Hardware Remodel Close date: Oct 28, 2017 \$8,400</p>	<p>Tom's Hardware Remodel Close date: Sep 19, 2017 \$8,400</p>	<p>Jen Wang Close date: Aug 12, 2017 \$8,400</p>
<p>Stacy Project Close date: Sep 19, 2017 \$650</p>	<p>+ Add a deal</p>	<p>Stacy Project Close date: Sep 19, 2017 \$650</p>	<p>Stacy Project Close date: Feb 8, 2018 \$650</p>	<p>+ Add a deal</p>
<p>Wilson Project Close date: Oct 28, 2017 \$800</p>		<p>Wilson Project Close date: Oct 28, 2017 \$800</p>	<p>Wilson Project Close date: Jul 24, 2017 \$800</p>	

Pipeline: After

## Anthony's wedding [\(back to search results\)](#)

General

Products / Subscription Plans

Sharing

### Next follow-up action:

set up consultation

07-20-2017



01:00 PM

[+ Add a note about your last action](#)

### Currently assigned to:

Valery Lopez

### Set Lead Referral Partner:

Choose a referral partner id

[Go](#) [Search...](#)

[Clear](#)

### Sales Stage and Steps:

New prospect

Move By: 7/21/2017

- Determine guest count \*
- Create menu \*

### When will this deal close?

Commit to Forecast?

### Projected Revenue

Projected Revenue High 0.00 \$

Projected Revenue Low 0.00 \$

### Opportunity Summary [Edit...](#)

#### Contact Information:

Anthony Frank

[anthony@gmail.com](mailto:anthony@gmail.com)

No Leadsources

#### Score:

Lead Score

#### Opportunity Notes:

Anthony will be getting married 8/3

[Preview Notes](#)

[Save](#)

[Save & Search](#)

[Delete](#)

Select an action

Created: Valery Lopez Tuesday, July 18, 2017 8:44:29 AM  
Last Updated: Valery Lopez Tuesday, July 18, 2017 8:44:29 AM [?](#)

Tasks

[Scored & Recent Activity](#)

[Sales History](#)

[Follow-Up Sequences](#)

[Orders](#)

[File Box](#)

### Tasks & Appointments

[Add Appointment](#)

[Add Task](#)






# Opportunities: Before

×








### Tom's Hardware Remodel

**\$8,400** Estimated close date: Jul 24, 2017

Contacts Team members





Estimate Scheduled Contract Approved Contract signed First payment collected





Call Text Email Notes Tasks Calendar Files

#### Deal activity

Today

-  **Task** completed by **Lauren Smith** 9:36 am   
Completed task: Call back and schedule appt for  
[View task](#)
-  **Note** created by **Bill Markly** 7:20 am   
Had a quick call to update the invoice with new shipping address. He mentioned he wanted to get more informa...  
[See note](#)

Yesterday

-  **Email** sent by **Bill markley** 10:29 am   
Subject: Attached is the estimate you requested.  
Body: Please call me back, attached is the estimate you requested.  
[View Email](#)
-  **Task** created by **Lauren Smith** 9:15 am 

Opportunities: After = Deals

# Dashboard

## Tasks

### Past Due

- Test Appt Created- Due 50 days ago  
Tyson Brown
- Hey- Due 45 days ago  
Tyson Brown
- Call wife- Due 44 days ago  
Tyson Brown
- esdfesdfa- Due 1 days ago  
Tyson Brown

### Today

- new-task- Due 2 hours ago  
Jenny Cox
- My new task Due today, 9:00 pm  
Roger Rabbit

### Tomorrow

- gldsjgl- Due tomorrow, 2:00 pm  
Josh Moore

1 more tasks...

[View all tasks](#)

[Add a task](#)

## New contacts

Last 7 days

2

## Total contacts

10

[View all contacts](#)

## Latest broadcast ▾

### Test email

1 Opens 100%

0 Clicks 0%

Sent on Jan 8 2018 11:00 am Total sent 1

[View broadcast details](#)



### Add your first contact

Time needed: 1 min

[Add a contact](#)



### Start your first campaign

Time needed: 5 min

[Select a campaign](#)



### Streamline your payment process

Time needed: 5 min

[Find out more](#)

# Dashboard Widgets: New