

Chapter 1: Pre-Flight Checks

The screenshot shows a user interface with a dark navigation bar at the top containing icons for home, clock, star, list, user, and help, along with a search bar labeled "Find a". Below the navigation bar, the user is greeted with "Hi, Paul!". To the left of the main content is a vertical menu with three items: "Edit My Profile" (highlighted), "Manage Accounts", and "Log Out". To the right, under the heading "Your Accounts", there is a list of accounts, each with a small green icon and a name: PM, Infusionsoft Community (with a person icon), JB Photography, jiveSYSTEMS, ICON14 Demo App, KSAX, Primary, and VYKS CH.

HTML Signature [?](#)

HTML Signature

Preview

Edit

Source

Create a great day,



Small Business Growth Expert

PAUL SOKOL

Campaign Builder Specialist Mad Scientist

480-499-6864

paul.sokol@infusionsoft.com

Infusionsoft.



"That which the mind can conceive and believe, it can achieve!" - Dr. Napoleon Hill [Infusionsoft University is Open for Enrollment](#)

Save

Edit User Permissions

Hey ~Contact.FirstName~,

This is an email.

~Owner.HTMLSignature~

View for on

✓	12:00AM	John Smallbiz	[NEW LEAD] John Smallbiz
📅	12:00PM - 1:00PM	John Smallbiz	Lunch Meeting
\$	3:00PM	John Smallbiz	John Smallbiz

My Nav					Find a cont				
My Nav		CRM		Marketing		E-Commerce		Admin	
Contacts		Contacts		Campaign Builder		E-Commerce Setup		Branding Center	
Campaign Builder		Companies		Email & Broadcasts		Orders		Infusionsoft Account	
Email & Broadcasts		Opportunities		Lead Generation		Products		Users	
Legacy		Referral Partners		Templates		Actions		Import Data	
Templates		Visitors		Legacy		Promotions		Data Cleanup	
Opportunities						Legacy			
Edit		Reports	Settings	Reports	Settings	Reports	Settings	Reports	Settings

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Address Block [?](#)

Company

Street Address 1

Street Address 2

City

Zip

Country

State

Phone

Layout

Preview (save to refresh): 1260 South Spectrum Blvd. Chandler, Arizona 85286 United States

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Users

[Add Users](#) [Add Partner](#)

Main Search [Search](#)

Status

[Actions](#) ▾

Add User(s)

Type the first name and email address of the user(s) you want to add we'll send them a snazzy email inviting them to Infusionsoft.

By the way you have **2 user licenses** left so if you need more you're gonna need to call us at 1 (866) 800-0004 ext. 1 [My Account Page](#)

First Name	Email	Admin?
<input type="text" value="Paul"/>	<input type="text" value="PaulsEmail@gmail.com"/>	<input type="button" value="++"/> <input type="button" value="No"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="++"/> <input type="button" value="No"/>

[Back](#) [Send Email Invitation](#)

Chapter 2: Critical Tools for Mastery

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Custom Fields for the Contact Record

Custom fields show up in their own tab(s) on the contact record, underneath a header. You can create up to 100 custom fields and can have as many tabs and headers as you would like. You currently have 80 custom contact fields.

Field

To: Email

Subject: hey

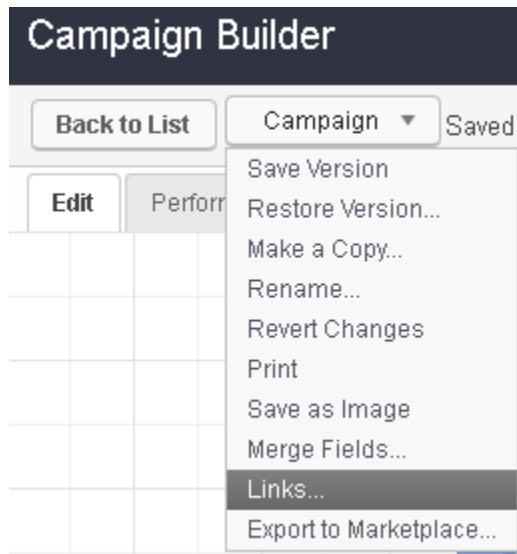
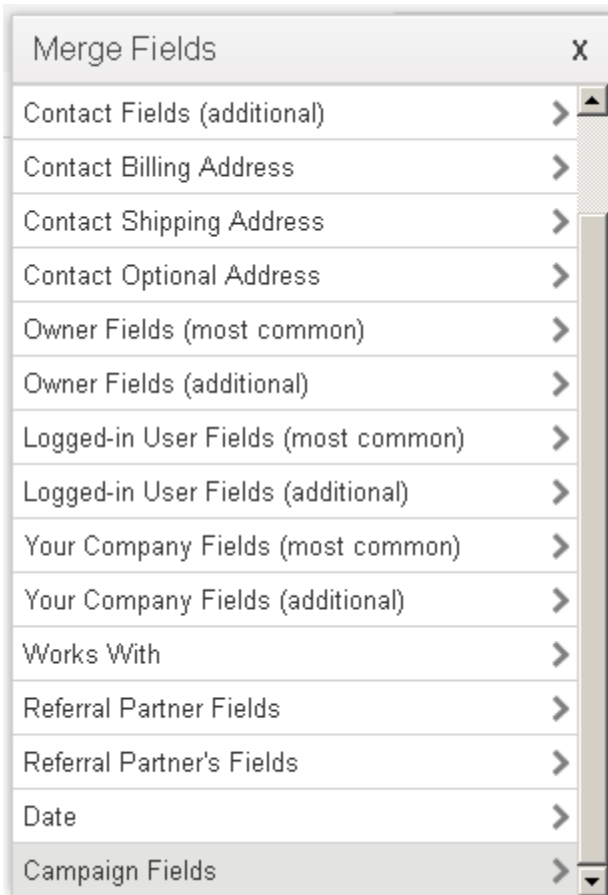
To: Email

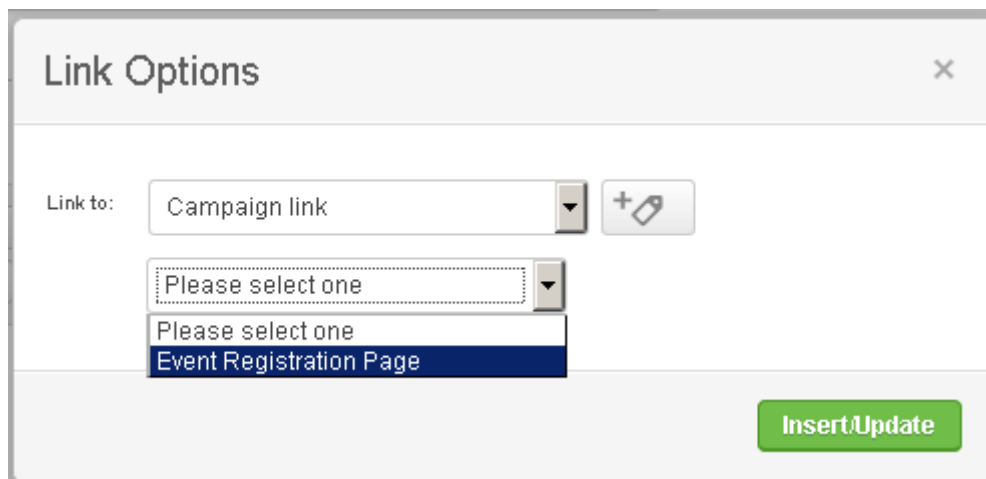
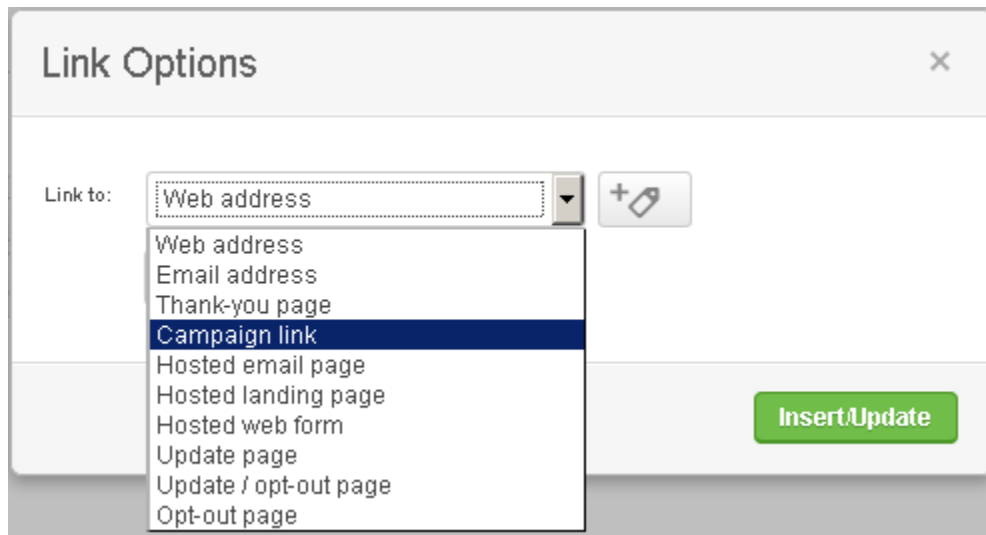
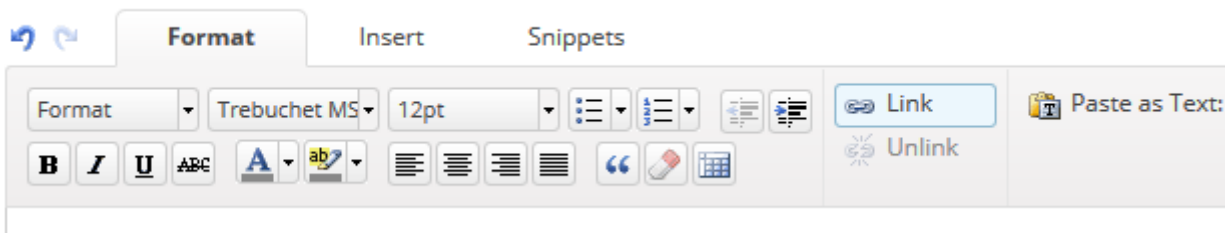
Subject: hey ~Contact.FirstName~

Campaign Builder

Campaign


- Save Version
- Restore Version...
- Make a Copy...
- Rename...
- Revert Changes
- Print
- Save as Image
- Merge Fields...**
- Links...
- Export to Marketplace...





Name	URL
Event Registration Page	http://http:// /website.com?inf_field_FirstName=~Contact.FirstName~

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
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Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

 Contact & Company Settings
General
Task/Appt/Note Settings
Tags
Tag Categories

Tags

[Add Tag](#)

[Import Tags](#)

Name [Search](#)

Category ▼

Notes

View All

Note Template...

Add Note

This Contact does not have any Notes

Form Submissions

Internal Forms...

Fill Out

This Contact does not have any Form Submissions

Recent Email History

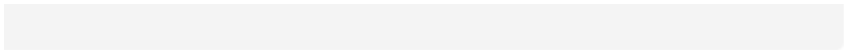
Send Email

View Entire History

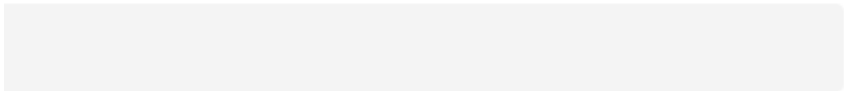
Quick Date Keys

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

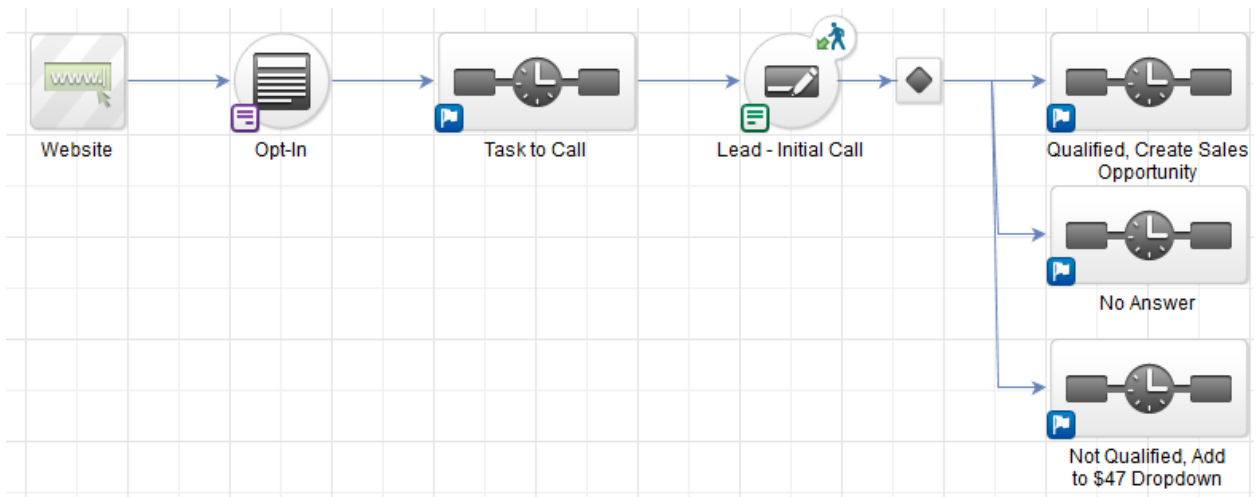
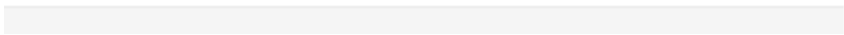
OK



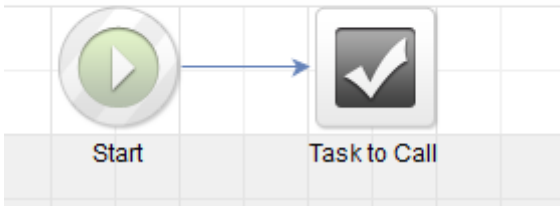
View All | Note Template... | **Add Note**



Internal Forms... | **Fill Out**



Task to Call



Type:

Title:

Body:

Assign to Contact's owner:

Assign to (backup):

Days until due:

Due at:


Priority:

Notify owner:

Notify these users:

Pop up reminder: before due date

Task/Appt/Note Settings

-  Contact & Company Settings
- General
- Task/Appt/Note Settings
- Tags
- Tag Categories

Task/Appt/Note

Type Options:

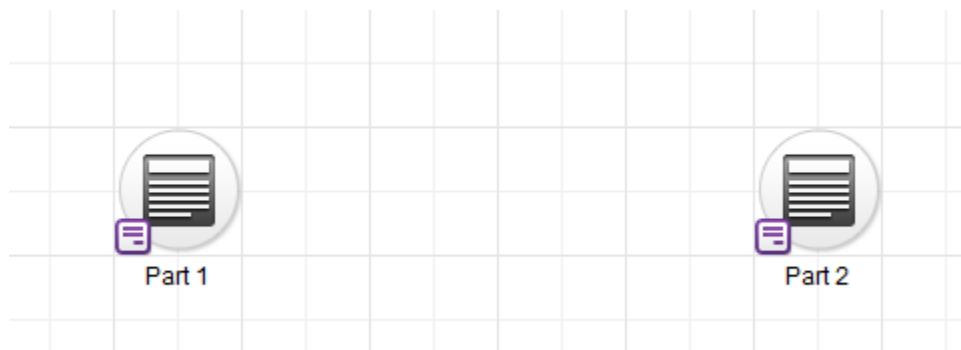
- Call
- Email
- Appointment
- Fax
- Letter
- Other
- UPDATE

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Birthday Reminders
 Send birthday wishes to all of your most important contacts. [More](#)

Free **Install**

★★★★★ (3) ↓ 1,283



Hidden Field Settings ✕

Which Field

Field Value

Thank-you Page to Display [?](#)

- Thank-you page
- Web address**

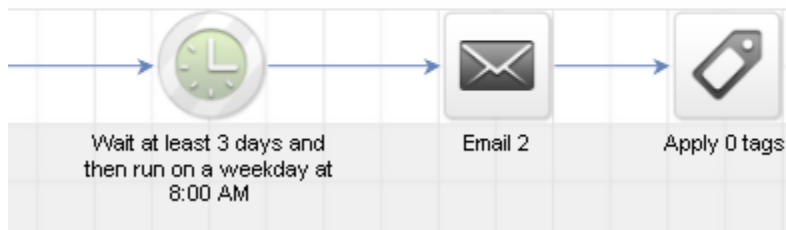
This option is only applicable when pasting the JavaScript Snippet code onto your site.

URL:

Pass contact's information to the thank-you page [?](#)

Saved at 9:33:08 pm

Campaign A

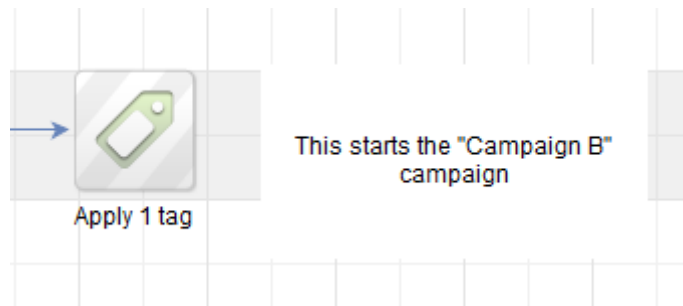


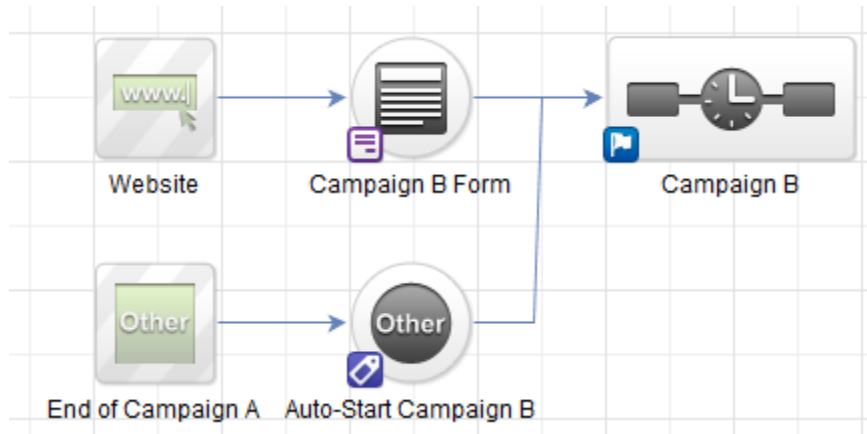
Configure Tag

Apply Remove

Functional -> Start Campaign B x

Cancel Save



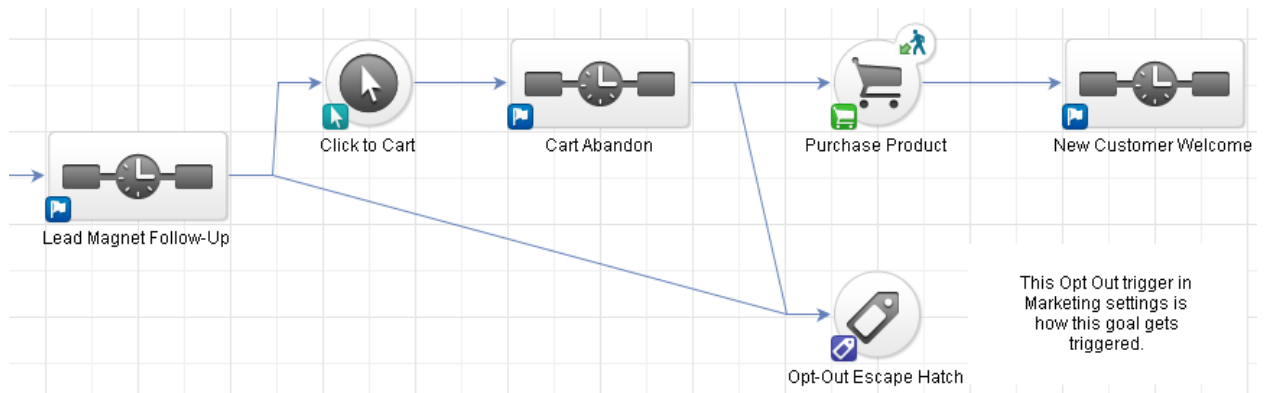


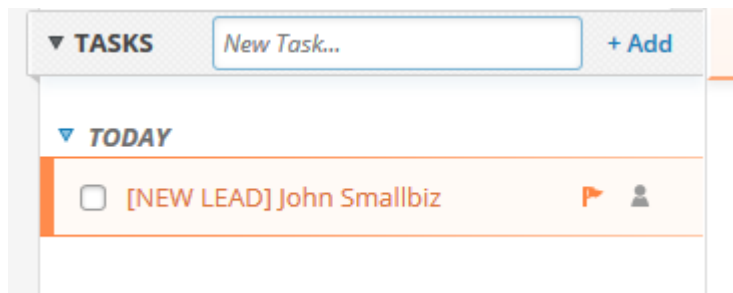
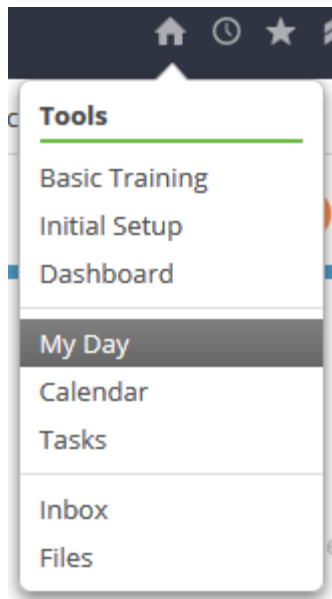
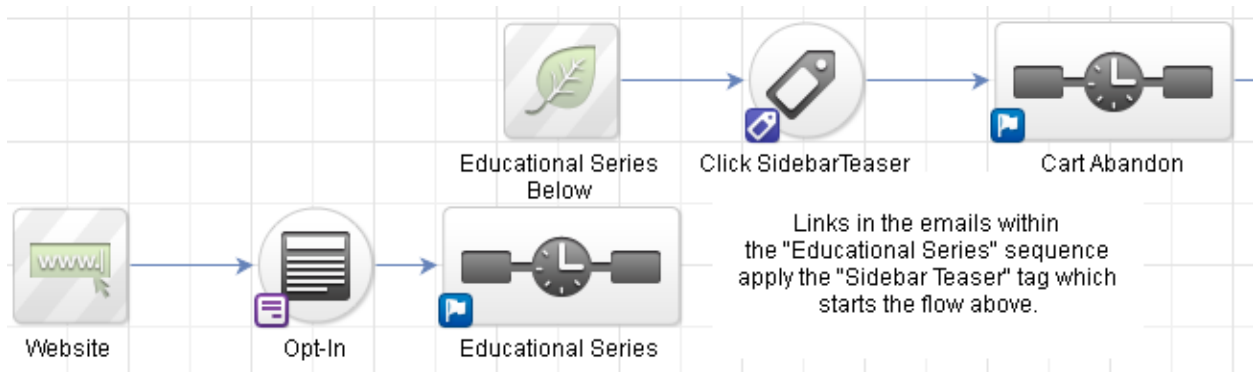
Configure Tag

This goal is achieved when any of these tags are applied:

Functional -> Start Campaign B x

Cancel Save





[NEW LEAD] John Smallbiz



Call John Smallbiz at (866) 800-0004 and follow "Widget A Phone Script v. 1.2".

If you get a voice-to-voice, fill out internal form "[LEAD] Widget A Response" then mark this task as complete.

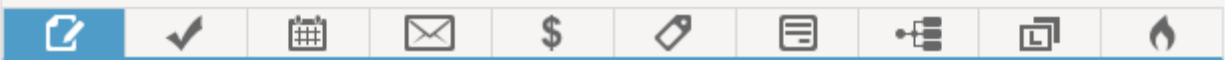
If there is no answer, apply the note template "[LEAD] Widget A No Answer" then mark this task as complete.

John Smallbiz



Email:

Phone 1: (866) 800-0004 (Work)



▼ **TASKS** + Add

▼ **TODAY**

[NEW LEAD] John Smallbiz ▶ 👤

▼ **TASKS** + Add

▼ **OVERDUE**

KCR Monetary Donation - Gia Ve... ▶ 👤

KCR Monetary Donation - Ted Mo... ▶ 👤

KCR Monetary Donation - Heathe... ▶ 👤

KCR Monetary Donation - Thomas... ▶ 👤

▼ **TODAY**

Elivagar - Get Flyer & Post to... ▶

Elivagar - Get Flyer & Post to Wall ✎ | 🗑

Acquire the flyer for the 9/17/2015 show at Club Red, then post to the Elivagar wall. Mark as complete.

🔥🔥🔥🔥🔥 ➔ ⚙

Email: elivagarbm+09.17.15@gmail.... **Phone 1:**

Field Settings ✕

Contact Name 🔥🔥🔥🔥 ?

Email: **Phone 1:**

General | Address | Additional Info | Custom Fields

<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Company
<input type="checkbox"/> Job Title	<input type="checkbox"/> Person Type	<input type="checkbox"/> Leadsource
<input type="checkbox"/> Owner	<input checked="" type="checkbox"/> Phone 1	<input type="checkbox"/> Phone 2
<input type="checkbox"/> Fax 1	<input type="checkbox"/> Website	<input checked="" type="checkbox"/> Email

Cancel Save

▼ **TODAY**

📞 [NEW LEAD] John Smallbiz 🚩 👤

▼ **APPOINTMENTS** + Add

12:00p - 1:00p ✎ | 🗑
 Today at La Stella Lunch Meeting
👤 John Smallbiz

Lunch Meeting
 Discuss what he needs in a quote.

John Smallbiz 🔥🔥🔥🔥 ⚙

Email: **Phone 1:** (866) 800-0004...

John Smallbiz 🔥🔥🔥🔥

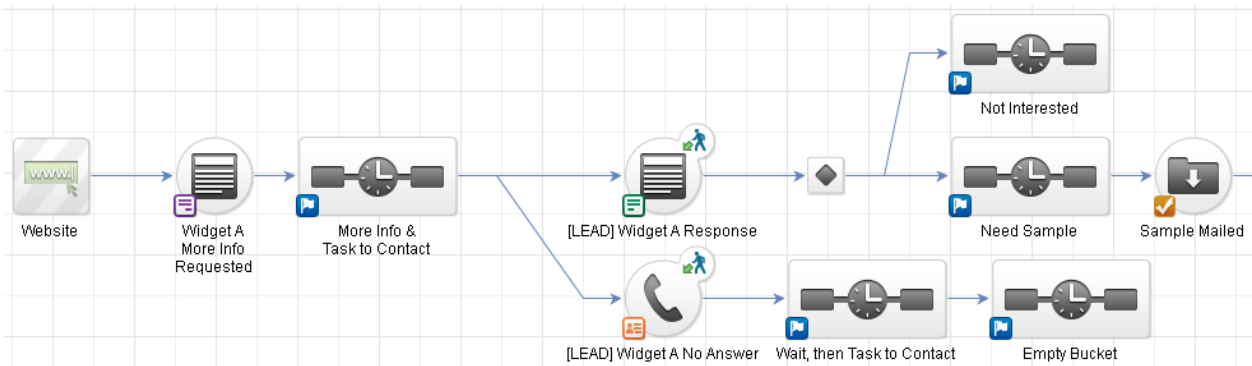
Email: Phone 1: (866) 800-0004...

close ▲

Incomplete Tasks

Add Task

Due	Title	Assigned User
02/04/2015	📞 [NEW LEAD] John Smallbiz	Paul Sokol



John Smallbiz 🔥🔥🔥🔥

Email: Phone 1: (866) 800-0004 (Work)



close ▲

Form Submissions











Internal Forms...

Fill Out Form

This contact does not have any form submissions

John Smallbiz  

Email: Phone 1: (866) 800-0004 (Work)

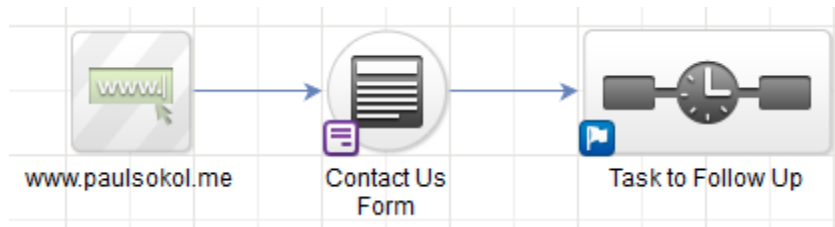
         

[close ^](#)

Notes

[Add Note](#)

Chapter 3: Attracting Leads and Building Your List



First Name *

Last Name *

Email *

Phone

First Name *

Last Name *

Email *

Phone

Comments?

**Questions? Comments? Concerns?
Fill out the 'Contact Us' form below and
we will respond shortly!**

First Name *

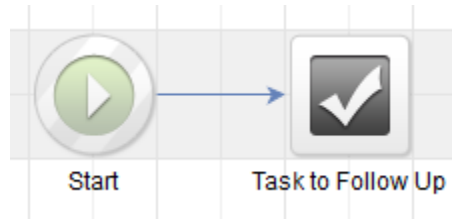
Last Name *

Email *

Phone

Comments?

Thank you for reaching out ~Contact.FirstName~! We will contact you shortly.



Type: Other

Title: Contact Us - ~Contact.FirstName~ Merge

Body:

Contact ~Contact.FirstName~

~Contact.LastName~ at ~Contact.Email~ or

~Contact.Phone1~.

Comments: ~Contact._ContactUsComments~

Assign to Contact's owner

Assign to (backup): Paul Sokol

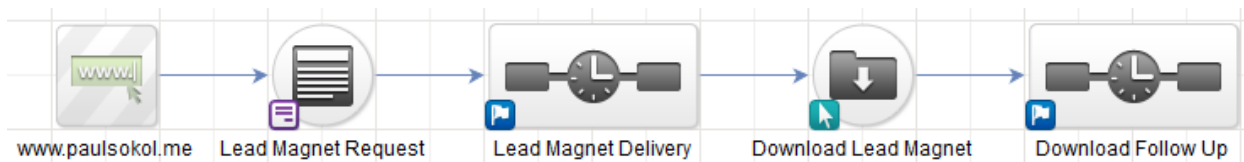
Days until due: 0

Due at: Please select one

Priority: 2. Essential

You got it ~Contact.FirstName~! We'll give you a call at ~Contact.Phone1~ as soon as we possibly can.

In the meantime, why not check out the latest happenings on [our Twitter feed](#).



Download My 'Top 10 Tips to Live At #InboxZero' PDF!

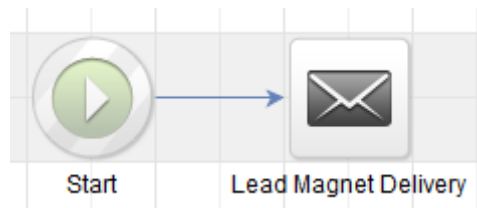
Share your name and best email below:

First Name *

Email *

Email Me A Copy!

Check your email right now for your download link
~Contact.FirstName~!



Subject: what'd ya think?

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet MS

12pt



Link

Paste as Te



Unlink

Good morning ~Contact.FirstName~!

How is your ~Date.DayOfWeek~ shaping up so far?

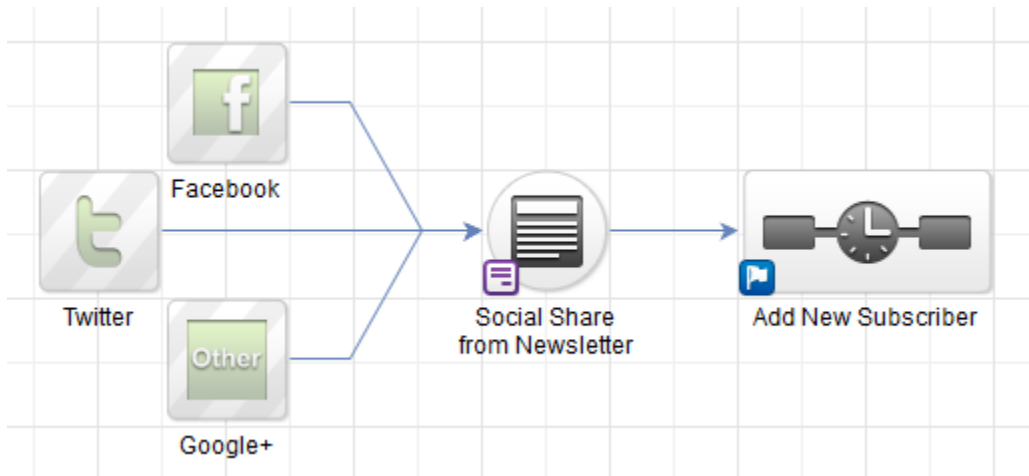
Just wanted to touch base and see what you thought about my PDF on how to live #InboxZero. Wasn't tip #4 awesome?

Anyway, thanks for checking it out!

If you need help implementing those tips in your life, just hit reply and let me know where you are stuck. I'll see what I can do.

Cheers,

~Owner.FirstName~



First Name *

Email *

Add Me To Your Email List!

"Hi social buddy!



Did you like what your friend shared over there? You can get stuff like that emailed directly to you.

Please add yourself to our email list below and I'll see you next issue :)"

- Paul Sokol

First Name *


Email *


Add Me To Your Email List!


You got it ~Contact.FirstName~! You're on the email list and will get the next issue.

Social Media Settings ✕


Sharing Options:


 Like


 Tweet

 +1

Follow Options:

 Please select one ▼

 Please select one ▼



Display Options:

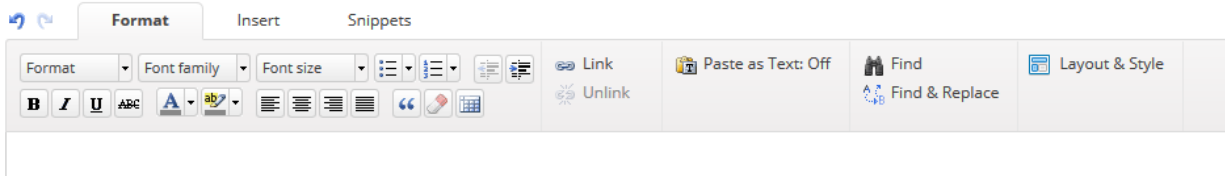
Layout: ▼

Alignment: ▼

Labels:

Share this email with your friends
using the buttons below:





Social Sharing Layout

Show Form On

Form

Form Position

Preview

Share this email with your friends using the buttons below:



Here is the newsletter I want to use with the social sharing form.

When people share me, you'll see a form at my side.

Have a great Monday,
Paul

[Update Your Information or Unsubscribe](#)
1260 South Spectrum Blvd. Chandler, Arizona 85286 United States

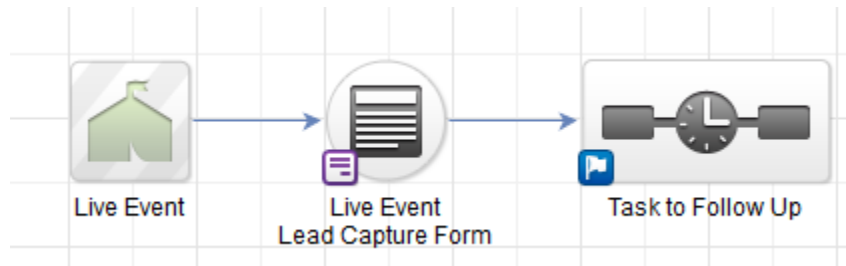
"Hi social buddy!



Did you like what your friend shared over there? You can get stuff like that emailed directly to you.

Please add yourself to our email list below and I'll see you next issue :)"
- Paul Sokol

First Name *
Email *

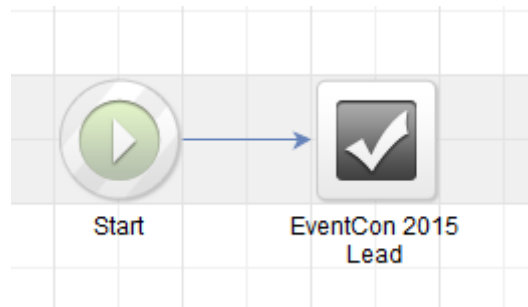


Use this to add a new lead from EventCon 2015!

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Company *	<input type="text"/>
Email *	<input type="text"/>
Phone *	<input type="text"/>

Add New Lead

You have added ~Contact.FirstName~!



Type: Other

Title: New EventCon Lead - --Contact.Firs Merge

Body: Follow up with --Contact.FirstName-- --Contact.LastName-- at --Contact.Email-- or --Contact.Phone1--. They work with --Contact.Company-- and we met them at EventCon.

Assign to Contact's owner

Assign to (backup): Paul Sokol

Days until due: 0

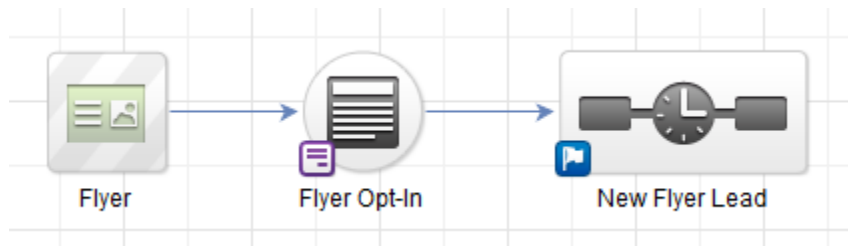
Due at: Please select one

Priority: 2. Essential

Notify owner

Notify these users: Please select a user to notify

Pop up reminder: before due date





**Want to talk to us?
We WANT to talk to you!**

First Name *

Last Name *

Email *

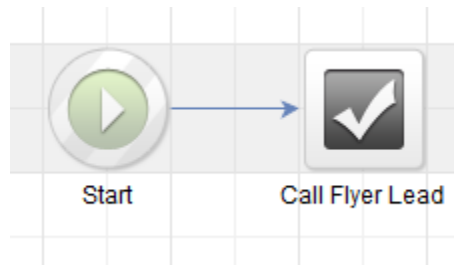
Phone *

Comments?

Call Me!



We will call you soon ~Contact.FirstName~!



Type: Call

Title: Flyer Lead - -Contact.FirstName- - Merge

Body: Call -Contact.FirstName-
-Contact.LastName- at -Contact.Phone1-.

Assign to Contact's owner

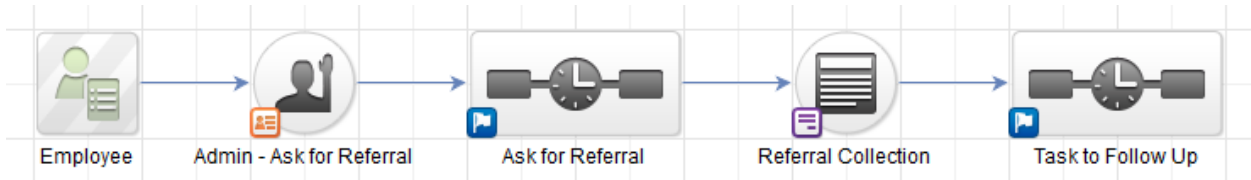
Assign to (backup): Paul Sokol

Days until due: 0

Due at: Please select one

Priority: 2. Essential

Notify owner



Configure Note Template

Action Type: Other

Description: Asked for Referral

Creation Notes: We asked them for a referral.

User: The logged-in User

Notify: Please select a User

Cancel Save

Goal Settings

This goal is achieved when a Contact...

Submits a Web Form

This goal can be achieved by...

Contacts in this Campaign

Contacts in this Campaign

Any Contact



Recommend a Friend!

My Friend's Name *

My Friend's Phone *

My Name Is *

My Email Is *

Please Call Them



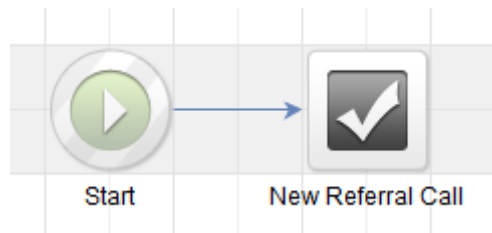
Thanks for the recommendation
~Contact._ReferringName~.

We will call ~Contact.FirstName~ soon!

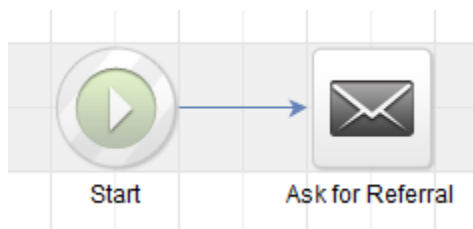
Design Thank-you Page **Settings** Code

Auto-populate Form ?

Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email



Type	Call
Title	New Referral - ~Contact.FirstName~ Merge
Body	<p>~Contact.ReferredName~ (~Contact.ReferredEmail~) just referred ~Contact.FirstName~ to us. Give ~Contact.FirstName~ a call at ~Contact.Phone1~.</p>
Assign to Contact's owner	<input checked="" type="checkbox"/>
Assign to (backup)	Paul Sokol
Days until due	0
Due at	Please select one
Priority	1. Critical



Thanks for being a valued customer ~Contact.FirstName~!

I have a quick question: who do you know that could also benefit from what ~Company.Company~ offers?

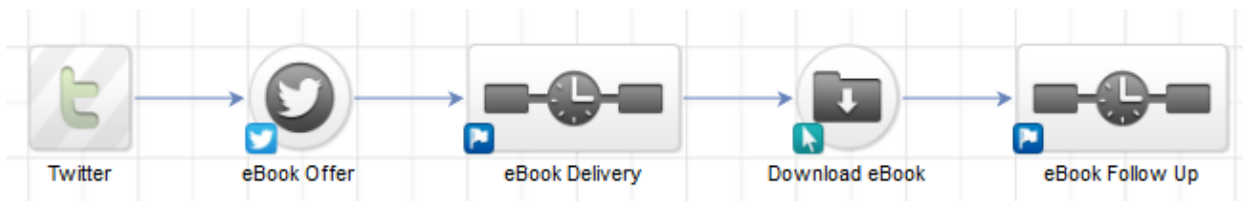
If you have somebody in mind, would you please click here and share their phone number so we can give them a call?

Thanks,
 ~Owner.FirstName~

P.S. If you can't think of somebody that's ok, no hard feelings :)

Link Options

Link to:



Subject:

Format | Insert | Snippets

Format | Font family | Font size | [List icons] | [Table icon] | | | Paste as Text: Off

[B] [I] [U] [ABC] [A] [ab] [List icons] [Quote icon] [Link icon] [Table icon]

Thanks for requesting the eBook, "How to Make Money Using Services Like uBer"!

You're in the right place, I've done it before and this eBook will show you how. Just read all the way to the end, ok?

[Download "How to Make Money Using Services Like uBer"](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

[Back to Campaign](#)

Download eBook

eBook Delivery

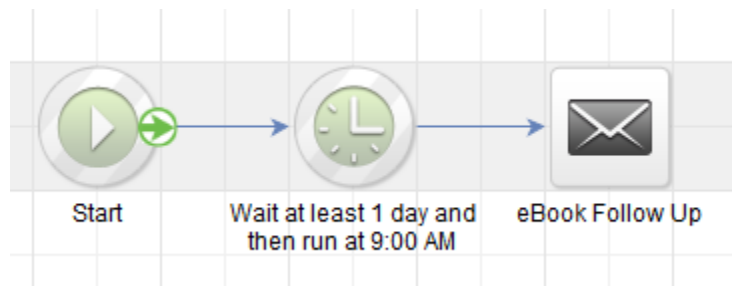
eBook Delivery
1 of 2 links are selected

Thanks for requesting the eBook, "How to Make Money Using Services Like uBer"!

You're in the right place, I've done it before and this eBook will show you how. Just read all the way to the end, ok?

[Download "How to Make Money Using Services Like uBer"](#)

Have a great Thursday,
Paul



Subject: Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt Paste as Text: Off

B *I* U ABC

Good morning ~Contact.FirstName~!

Just wanted to touch base and see what you thought about my eBook. Can you see yourself doing that? I couldn't either, but as you know, well...

Anyway, thanks for checking it out!

I do work in the Phoenix area so if you are serious about doing this driver thing, give me a call at 480-123-5555. I can help you get started with your account :)

Cheers,
~Owner.FirstName~

[Back to Campaign](#)

Accept Twitter Offer

1. Copy the following URL...

Copy

Card content

Short description ?

Provide a short description of the benefit users get by sharing their information with you.

28 characters

Card image ?

Your card image communicates the value of your business and your offer. Avoid using stock images.

Add image

Call to action ?

Choose a short call to action message.

4 characters

Preview

Mobile

Web



Paul Sokol

@voyicks

The card for your Promoted Tweet will look something like this!

10:10 PM - 5 May 2013

Download My Free eBook



Card image

Please Email Me!

Share your name and email address with Paul Sokol

Privacy policy URL ?

Your privacy policy must explain how user data is being used.

Card Details (Fallback) URL ?

▼ Data settings (optional)

If you choose not to specify these settings, you can always download the lead data using our Download Leads option.

Please complete the following technical settings in order for Twitter to send you users' data when they engage with your Lead Generation card. We recommend you read the [Lead Generation card setup instructions](#) before filling out this section.

Submit URL [?](#)

https://twitter/process/fadc34cd579169daf8aa04fbc50c98c

HTTP method

GET

GET
POST

Information below will be sent to your Submit URL.

What would you like to name your card?

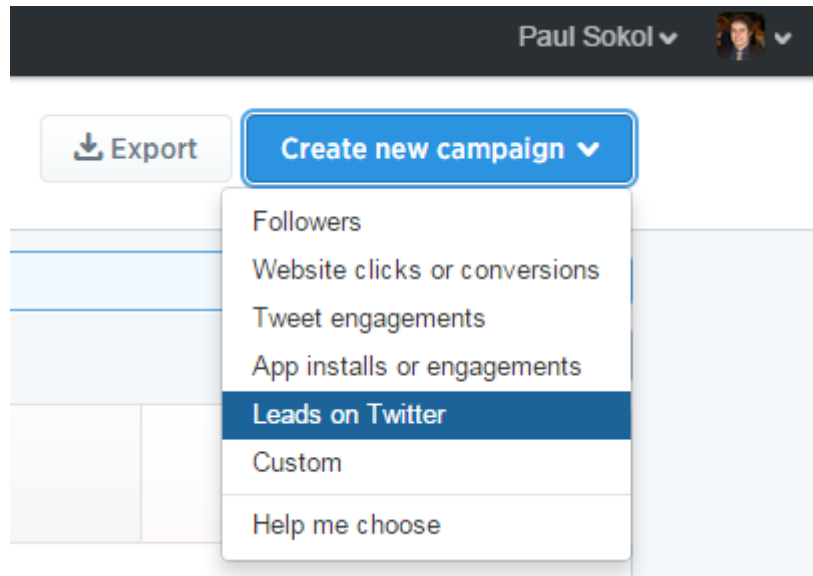
Infusionsoft Cookbook Chapter 3.7

When using Twitter's Lead Generation card feature, you must include a link to your Privacy Policy directly in your card. You can add this link through the Campaign User Interface. Pages where users are asked to enter private and confidential information must use a secure processing server (https://). Examples of private and confidential information include: credit card numbers, bank information, and social security numbers. Providing users with your Privacy Policy, as well as secure server when collecting their private and confidential information will allow users to understand the conditions under which they share their information. Specifically, they should know who is collecting their information, how it will be used, and what steps will be taken to ensure it

By creating this Lead Generation card, I agree that I have read and I abide by Twitter's data use policy.

Create card

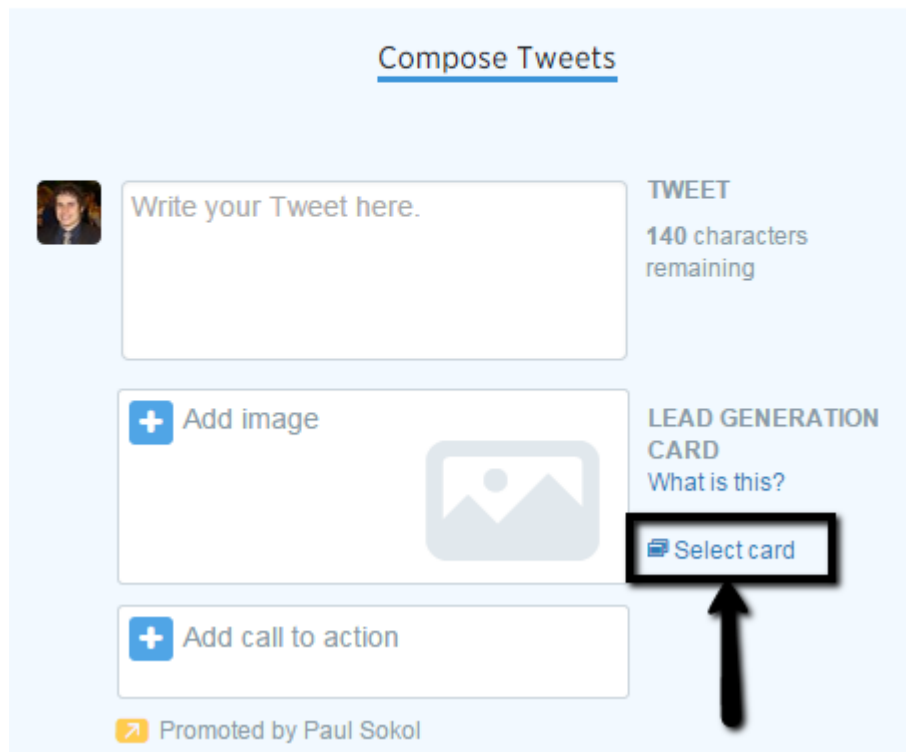
Cancel

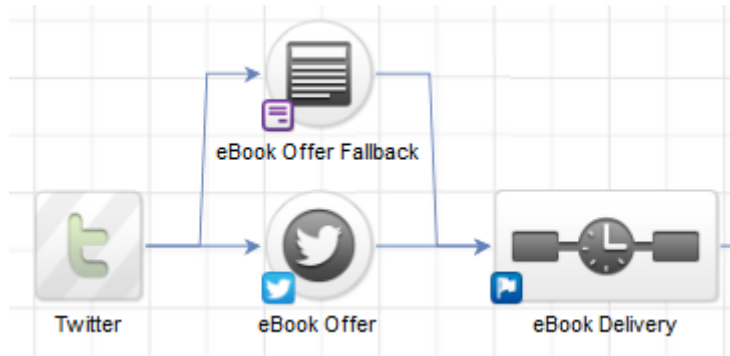


Creative

Compose or select Tweets to promote in this campaign.

This campaign requires the use of a Lead Generation Card to generate leads.





Whoops! Looks like your device doesn't support that kind of Twitter offer.

Doesn't mean you have to pay the price though, share your name and email below and I'll send it to you anyway

First Name *

Email *

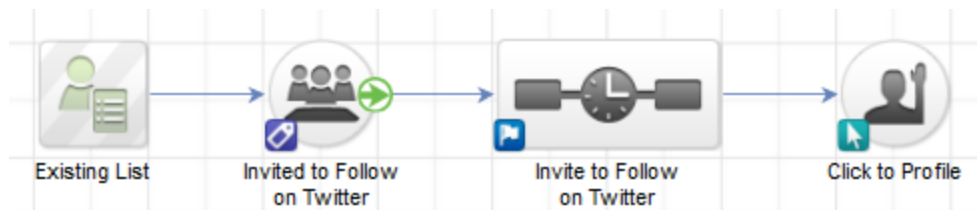
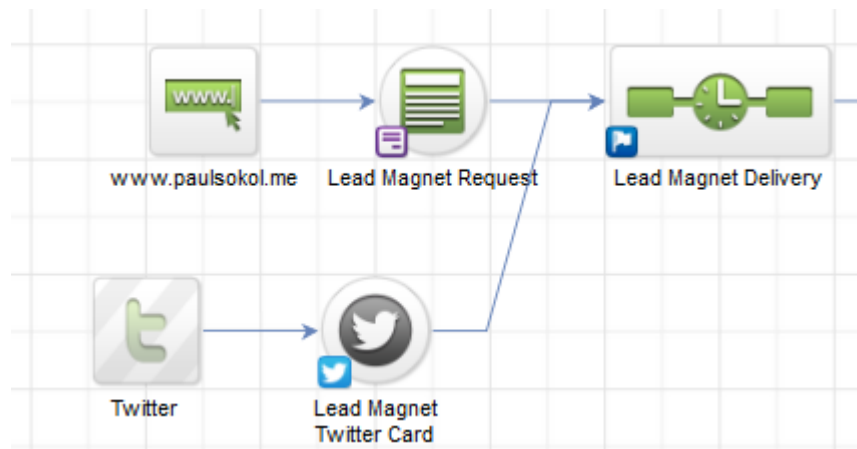
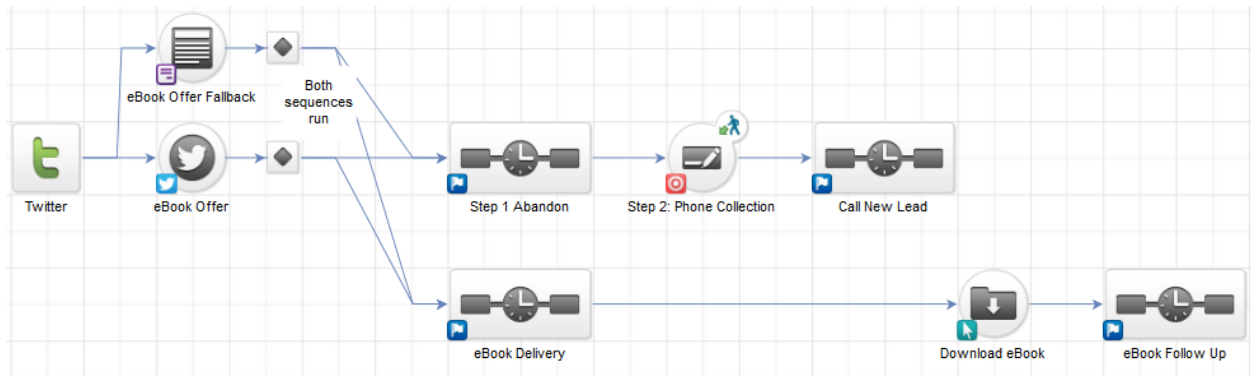
Please Email Me the eBook!

▼ Destination URL settings (optional)

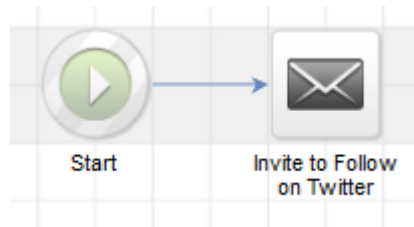
Adding a destination URL lets us redirect the user to your specified landing page after they submit the lead.

Destination URL

The user will be redirected to this URL after they submit the lead.



The screenshot shows a workflow editor interface. On the left, there are two task icons: 'Existing List' (a person icon) and 'Invited to Follow on Twitter' (a group of people icon). A blue arrow points from 'Existing List' to 'Invited to Follow on Twitter'. The 'Invited to Follow on Twitter' task is highlighted with a green dashed border and a green play button icon. A dialog box titled 'Configure Tag' is open over the workflow. The dialog box contains the text 'This goal is achieved when any of these tags are applied:' followed by a text input field containing 'Functional -> Invite to Follow on Twitter'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.



Subject: Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt Link Paste as Text: Off
Unlink

Hey ~Contact.FirstName~,

Not sure if you use Twitter, but I do AND I'd love to connect with you there too. Especially since I tend to post updates more often than I send emails ;)

[Click Here to Follow Me On Twitter](#)

If you don't use Twitter, that's ok too.

Until next time,
 ~Owner.FirstName~

Campaign Builder

Back to Campaign Click to Profile

Invite to Follow on Twitter
 Invite to Follow on Twitter
 1 of 2 links are selected

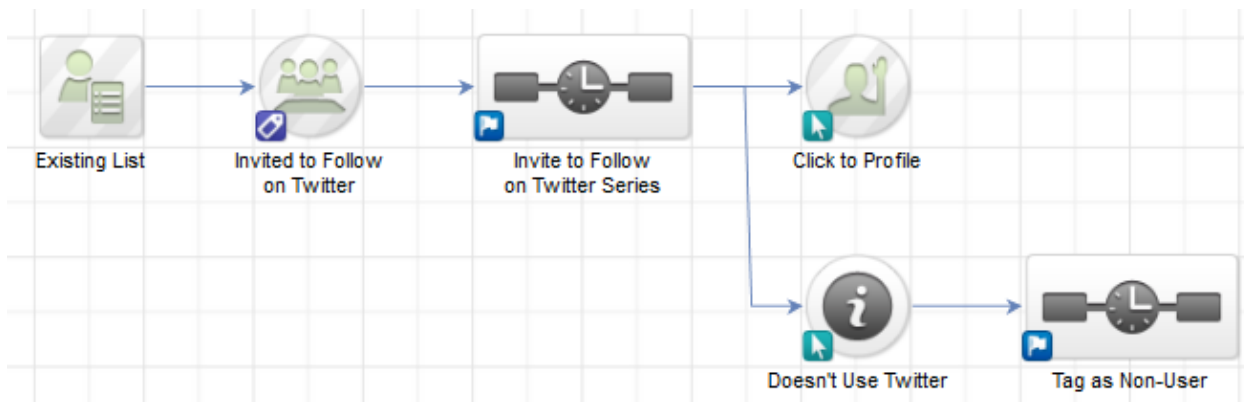
Hey Paul,

Not sure if you use Twitter, but I do AND I'd love to connect with you there too. Especially since I tend to post updates more often than I send emails ;)

[Click Here to Follow Me On Twitter](#)

If you don't use Twitter, that's ok too.

Until next time,
 Paul



Subject: Merge

HTML Plain Text

Format Insert Snippets

Image Table Divider Merge Fields Special chars

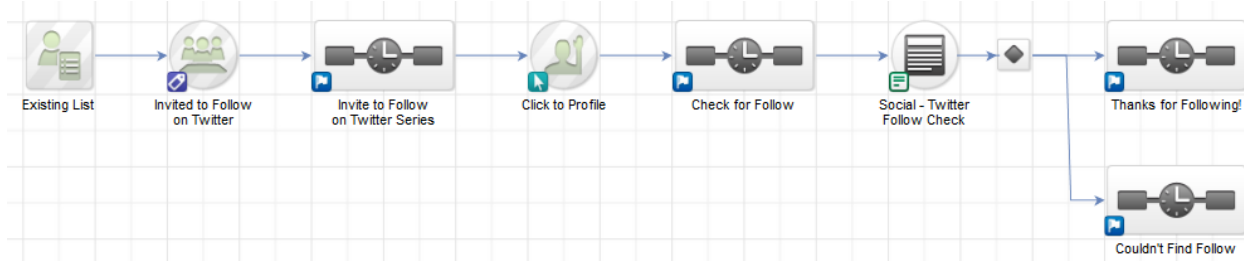
Hey ~Contact.FirstName~,

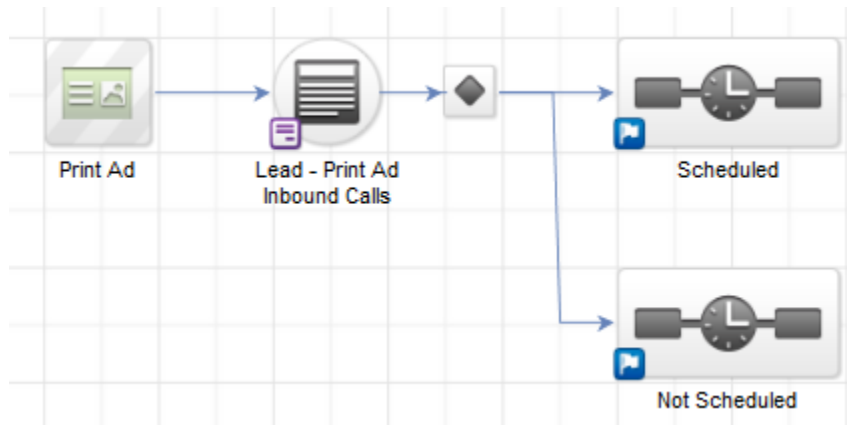
You mentioned Twitter on the phone earlier and I wanted to let you know we are on there as well. Feel free to follow us, we are always posting neat stuff!

[Click Here to Follow ~Company.Company~ On Twitter](#)

If you don't use Twitter, that's ok too.

Until next time,
~Owner.FirstName~





Goal Settings

This goal is achieved when a Contact...

Submits a Web Form

Contact

- Submits a Web Form
- Submits a Landing Page form
- Clicks a Link
- Reaches a Score
- Purchases a Product

User

- Submits an Internal Form
- Completes a Task
- Moves an Opportunity

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Email *	<input type="text"/>
Phone *	<input type="text"/>

Use this to track inbound phone calls from the print ad.

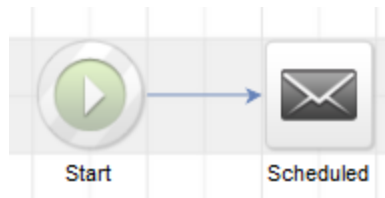
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Email *	<input type="text"/>
Phone *	<input type="text"/>
Did they schedule a consultation?	<input type="radio"/> Yes
	<input checked="" type="radio"/> No

Rules for: Scheduled

If the [Form Submission's](#) [Option](#) [Did they schedule a consultation? - Yes](#) is selected

Rules for: Not Scheduled

If the [Form Submission's](#) [Option](#) [Did they schedule a consultation? - No](#) is selected



Subject:

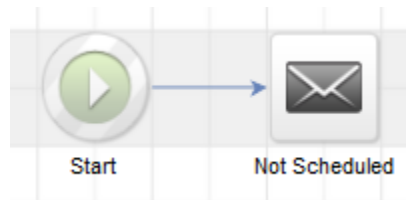
Format Insert Snippets

Format Font family Font size

Thanks for calling in today ~Contact.FirstName~!

We are looking forward to seeing your for the free consultation.

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~



Subject: Thanks!

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt

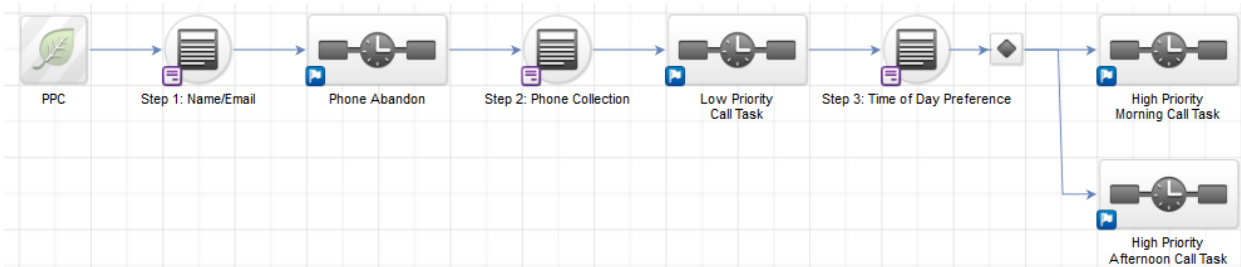
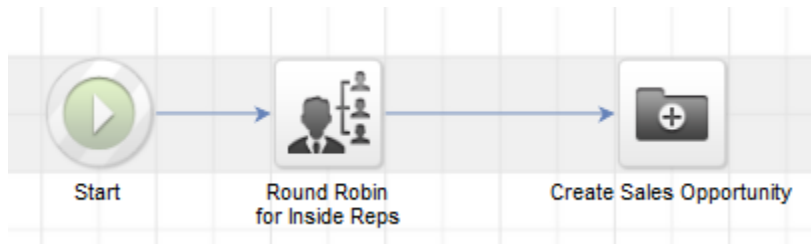
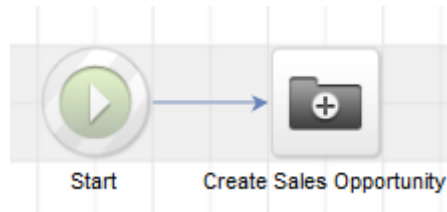
B *I* U ABC A [Color] [Background Color]

[List] [List] [List] [List] [Quote] [Image] [Table]

Thanks for calling in today ~Contact.FirstName~!

Sorry you didn't qualify for the free consultation.

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~



Step 3: What time do you prefer we call you?

Hidden Field (Email)

When is best to call? Mornings
 Afternoons

Call Me Then!

Success!

We will give you a call at ~Contact.Phone1~ then, ~Contact.FirstName~!

Rules for: High Priority Morning Call Task

If the Form Submission's Option When is best to call? - Mornings is selected

+ AND

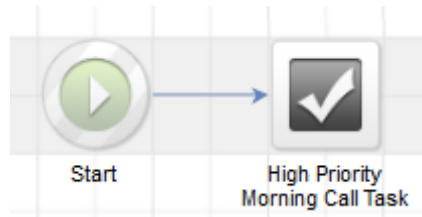
+ RULE

Rules for: High Priority Afternoon Call Task

If the Form Submission's Option When is best to call? - Afternoons is selected

+ AND

+ RULE



Type: Call

Title: Hot PPC Lead - ~Contact.FirstName Merge

Body: Give ~Contact.FirstName~ a call at ~Contact.Phone1~, they are a PPC lead.

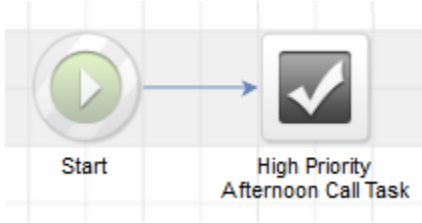
Assign to Contact's owner

Assign to (backup): Paul Sokol

Days until due: 0

Due at: 08:00 AM

Priority: 1. Critical



Type	Call	
Title	Hot PPC Lead - ~Contact.FirstName	Merge
Body	Give ~Contact.FirstName~ a call at ~Contact.Phone1~, they are a PPC lead.	
Assign to Contact's owner	<input checked="" type="checkbox"/>	
Assign to (backup)	Paul Sokol	
Days until due	0	
Due at	01:00 PM	
Priority	1. Critical	

Step 2: What is the best phone number to call you?

Hidden Field (Email)

My Best Phone # Is: *

Please Call Me!

Design **Thank-you Page** Settings Code

Thank-you Page to Display ?

Web address

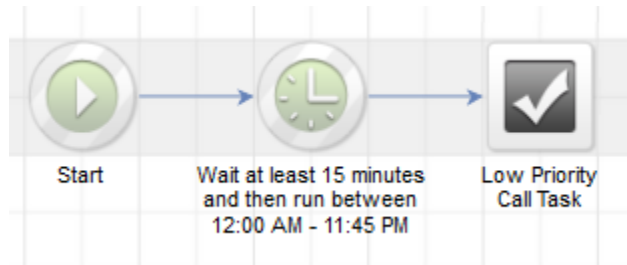
Redirect to thank-you page ?

This option is only applicable when pasting the JavaScript Snippet code onto your site. All other methods (HTML & Hosted) will redirect to a stand-alone thank-you page.

URL:

<https://voyicks.infusionsoft.com/app/form/9a3be15e15c785b5aca35e62d02825f2>

Pass contact's information to the thank-you page ?



Type

Title

Body

Assign to Contact's owner

Assign to (backup)

Days until due

Due at

Priority

Get Started On Your Service Call Now!

Step 1: How can we reach you by email?

First Name *

Email *

Link Options
✕

Link to: Hosted web form + ✎

Step 2: Phone Collection

Insert/Update

CRM

🏠 🕒 ★ ⚙️ 👤 ?
🔍 Find a contact...

My Nav	CRM	Marketing	E-Commerce	Admin
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts <li style="background-color: #34495e; color: white;">Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

👤 Lead Generation

Web Tracking

Web Analytics

Visitors

Web Analytics

[Get Tracking Code](#)

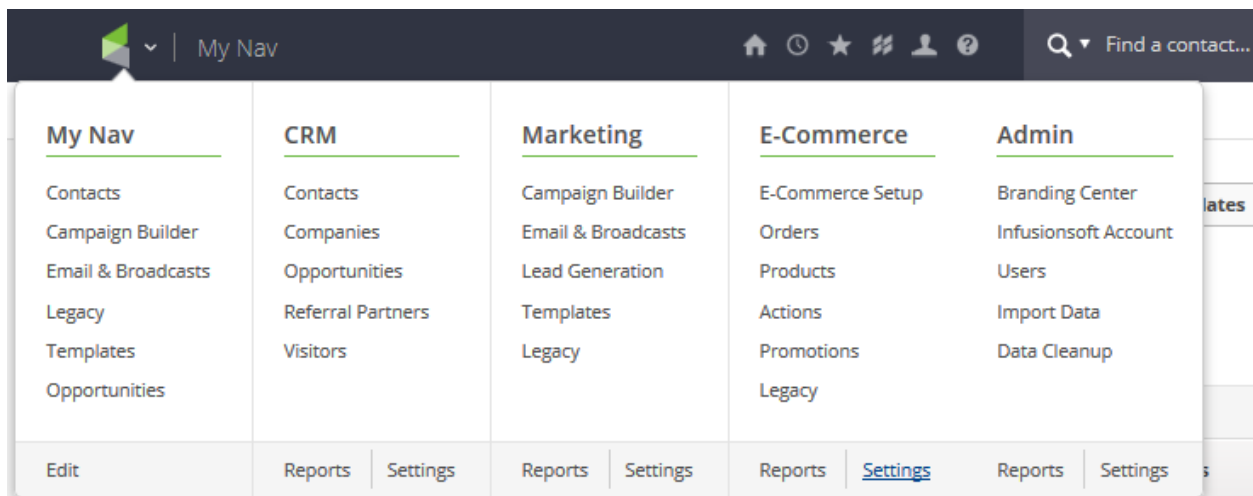
Paste this code on your site

Copy the following code, then paste it onto every page you want to track immediately before the closing body tag.

[Need more info?](#)

```
<script type="text/javascript" src="https://voyicks.infusionsoft.com/app/webTracking/getTrackingCode?trackingId=bc9b576fb049811a4bb726f690f3f8ae"></script>
```




Chapter 4: Selling Products Online and Getting Paid




The screenshot shows the Infusionsoft navigation menu. The top bar is dark with a search icon and the text "Find a contact...". Below the top bar, the navigation menu is displayed in a grid format with five main categories: My Nav, CRM, Marketing, E-Commerce, and Admin. Each category has a list of sub-items. At the bottom of each category, there are links for "Reports" and "Settings".

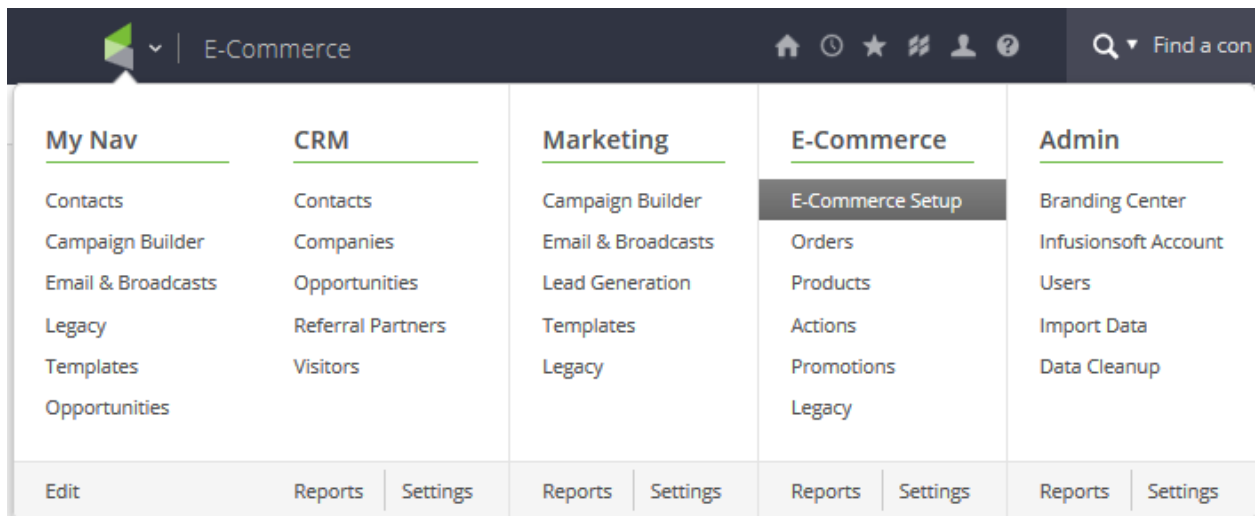
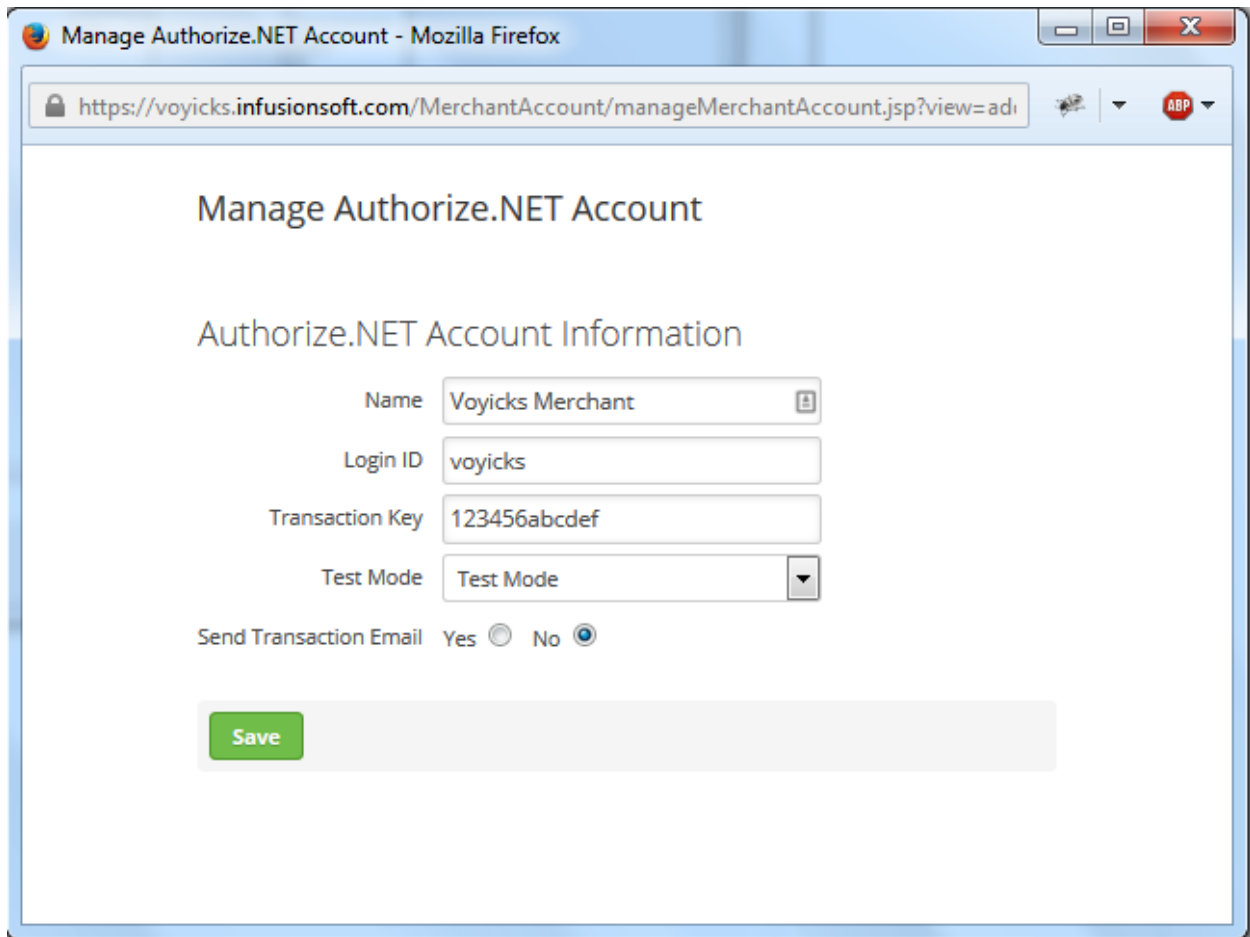
<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Product

-  **Order Settings**
 - Product**
 - Orders
 - Billing Automation
 - Sales Tax
-  **Payment Processing**
 - Merchant Accounts
-  **Fulfillment**
 - Fulfillment Reports

Add Merchant Account 

- Add Merchant Account**
- PowerPay
- Easy Pay Direct
- First Data e4 Gateway
- Authorize.NET
- Authorize.NET (Card Present Method)
- Beanstream
- CartConnect
- DPS
- EWay
- Internet Secure (Authorize Emulation)
- Moneris
- Network Merchants
- Sagepay (Protx)
- USA EPay
- WorldPay





Payment

[Payment Types](#)

[Receipts](#)

[Payment Plans](#)

Payment Types

[« Back to E-Commerce Setup](#)

Select how you will collect payment from customers.

Process Credit Card Payments

Allow your customers to pay with credit cards (requires a payment gateway).

Process Credit Card Payments

Merchant account to use:

Please select one



[Edit...](#) [Add new...](#)

Please select one

TEST MERCHANT ACCOUNT (DO NOT USE)

Voyicks Merchant

American Express

Discover

MasterCard

Visa

[\[Edit\]](#)

Voyicks Merchant

Authorize

0

[Click Here](#)

Orders

- Order Settings
 - Product
 - Orders**
 - Billing Automation
 - Sales Tax
- Payment Processing
 - Merchant Accounts
- Fulfillment
 - Fulfillment Reports

Countries

Default Country:

Invoice

Default Order Invoice Template: [Edit Add](#)

Default Subscription Invoice Template: [Edit Add](#)

Invoice Tax Label:

Default From Address:

Default Email Subject:

Default Email Body:

- Please select a currency locale:
- US Dollars**
 - Euro
 - Pounds
 - Rands
 - Australian Dollars
 - Canadian Dollars
 - New Zealand Dollars

Currency Locale:

Billing

Payment Types

[← Back to E-Commerce Setup](#)

Select how you will collect payment from customers.

Payments

Start accepting credit cards today

- ✓ Fast setup in 10 minutes or less!
- ✓ Simple, transparent pricing
- ✓ A stress-free experience from setup to support

Low Flat Rate
2.9%
+30¢ per transaction

Sign up now

To sign up, select the email address of your financial administrator

[Get Started](#)

[Learn more](#)

<input checked="" type="checkbox"/>	Image	Product name	SKU	Price	Delete
<input checked="" type="checkbox"/>		Sokol Widget 2.0		\$100.00	Delete

Add a Product ×

Product Name:

Product Type:

[Save](#)

[Product Information](#) | [Subscription Plans](#) | [Product Image](#) | [Product Options](#) | [Product Inventory](#) | [Links](#)

Product Name:

Product Type:

Short Description:

Max 250 Characters. This description appears on quotes, order forms and shopping cart.

Status:

Price: [?](#)

Cost:

SKU:

Product Information

Subscription Plans

Product Image

Product Options

Subscription Only:

Bill Every:

Week



of Cycles:

Plan Price:



Add

Active	Bill Every	# of Cycles	Plan Price
No results to display.			

Save

Save & Search

Delete

Product Information

Subscription Plans

Product Image

Product Options

Subscription Only:

Bill Every:

Month



of Cycles:

Plan Price:



Add

Active	Bill Every	# of Cycles	Plan Price	Delete	Order
	month	0	\$4.97	<input type="button" value="Delete"/>	

Save

Save & Search

Delete

Product

Order Settings

- Product**
- Orders
- Billing Automation
- Sales Tax

Payment Processing

- Merchant Accounts

Fulfillment

- Fulfillment Reports

Products and Subscription Plans

Run Purchase Actions On All Orders: Yes No

Product

Track Inventory? Yes No

Track Product Unit Cost? Yes No

Promo Codes:

test
WIDGET20

Save

Add Inventory Adjustment

Current Quantity: 0

Type: Increase

Quantity:

Adjust

Notification

Notify this Email:

Notify Limit: 0

Update

Save Save & Search Delete

Shopping Cart Images



Large Version



Product Grid Version



Upsell Version



Cart Version

Browse

Upload

Recommended size for images is at least 340px wide or 100KB, and must not exceed 3MB.

Manage Product Option



Note: The following Product Option will only appear in the Store Shopping Cart.

Product Option Attributes

Name:

Option Type:

Required:

Save

Create a New "Book Edition" Option Value

Value Name:

Code:

Price Adjustment:

Add to original price

Subtract from original price

Add

Book Edition Option Values

Name	Code	Price Adjustment	Options	
Softcover	soft		Delete	▼
Hardcover	hard	+ \$5.00	Delete	▲

Manage Product Option ✕

Note: The following Product Option will only appear in the Store Shopping Cart.

Product Option Attributes

Name: 📄

Option Type: ▼

Required: ▼

Variable Settings

Minimum Characters:

Maximum Characters:

Can Contain Spaces: Yes No

Can only start with: Letter
Number

Can only end with: Letter
Number

Can only contain: Letter
Number

Error Message:

Test (SaveFirst):

Categories: Check All | Uncheck All

Main Product Category

Category A

Voyicks

Shipping: ▼

Weight:

Taxable: ▼

Cart Options:

Cart Options

Is hidden in cart:

My Nav		CRM		Marketing		E-Commerce		Admin	
Contacts		Contacts		Campaign Builder		E-Commerce Setup		Branding Center	
Campaign Builder		Companies		Email & Broadcasts		Orders		Infusionsoft Account	
Email & Broadcasts		Opportunities		Lead Generation		Products		Users	
Legacy		Referral Partners		Templates		Actions		Import Data	
Templates		Visitors		Legacy		Promotions		Data Cleanup	
Opportunities						Legacy			
Edit		Reports	Settings	Reports	Settings	Reports	Settings	Reports	Settings



Design

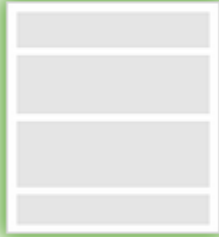
[Shopping Cart Themes](#)

[Order Form Themes](#)

Order Form Themes

[← Back to Order Form Themes](#)

Choose a layout



One Column



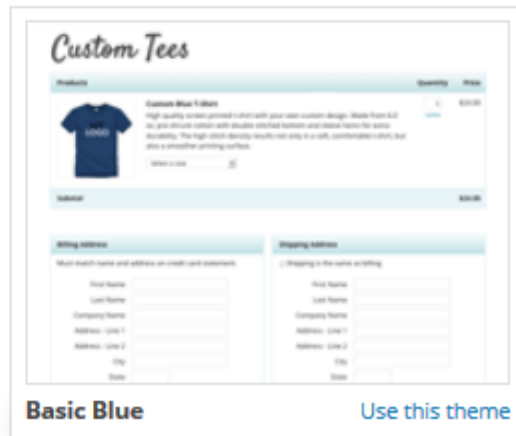
Two Column

Choose a Theme



Basic Grey [Use this theme](#)

The preview shows a form titled "Custom Tees" with a product listing for "Custom Blue T-Shirt" and two address sections: "Billing address" and "Shipping address". Each address section contains fields for First Name, Last Name, Company Name, Address - Line 1, Address - Line 2, City, and State. The form has a clean, modern look with a grey color scheme.



Basic Blue [Use this theme](#)

The preview shows a form titled "Custom Tees" with a product listing for "Custom Blue T-Shirt" and two address sections: "Billing address" and "Shipping address". Each address section contains fields for First Name, Last Name, Company Name, Address - Line 1, Address - Line 2, City, and State. The form has a clean, modern look with a blue color scheme.

Choose a name for your custom theme ×

Name:

Common Areas
Company Logo Top Banner



Custom Tees

Delete Edit

Edit Image ×

Maximum image width is 960px



Checkout

[Shopping Cart Settings](#)
[Order Forms](#)



Order Forms

[← Back to E-Commerce Setup](#)

Main Search

Search

Create New

Add Order Form ×

Name:

Infusionsoft Cookbook Order Form

Add Products

Product ×

Add Products

Product ✓

Order Form Name

Order Form Name

Infusionsoft Cookbook Order Form

Merchant Account

Merchant Account

Use the shopping cart's mercha... ▼

Check For Duplicates

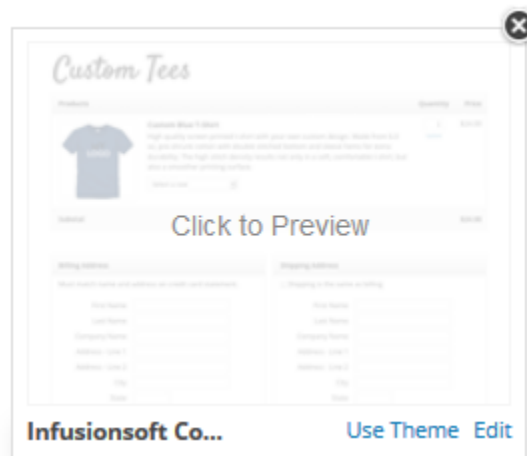
Check for duplicate contact records using...

Check using the person's first O... ▼

Notifications

Notify me by email when someone places an order

paul.sokol@infusionsoft.com





[Images](#) [HTML Areas](#) [Labels](#) **Edit CSS**

Appearance CSS:

```

1  /* Layout: One Column
2  Theme: Basic Gray
3
4  Appearance.css contains the cosmetic properties for your order
5  form, such as fonts, colors, background images and borders.
6
7  NOTE: There are additional classes that are not listed here
8  because they currently have no attributes. You can locate
9  these by downloading and using Firebug.
10 =====*/
11
12 /*@import url(https://fonts.googleapis.com/css?family=Open+Sans:400,700);
13 This is the correct location for import, remove import link in layout.css when ready
14 */
15
16 body, td {
17     font: 15px/1.5 'Open Sans', Helvetica, Arial, sans-serif;
18     color: #222;
19 }
20
21 img, img a {
22     border: 0 none;
23 }
24
25

```

Products on this order form

Name	Price	Type	Label	Quantity	Remove
Infusionsoft Cookbook	<input type="text" value="4.97"/>	Sell as a one-time product only	<input type="text" value="Infusionsoft Cookbook"/>	<input type="text" value="1"/>	Remove

Don't allow my customers to change the quantity

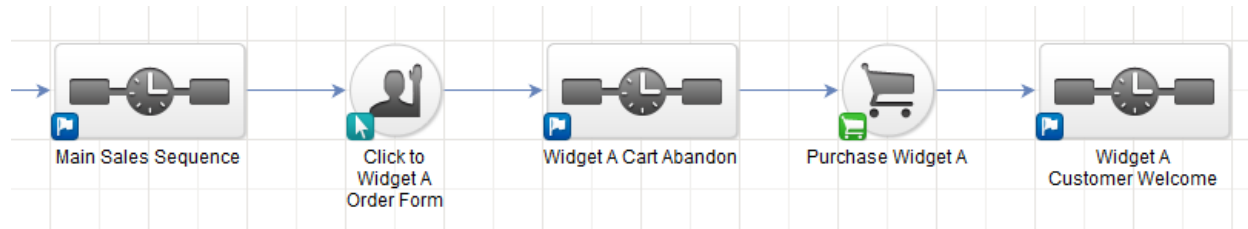


[Add Products](#) [Theme](#) **HTML Areas** [Thank You Page](#) [Settings](#) [Links](#)

Common Areas

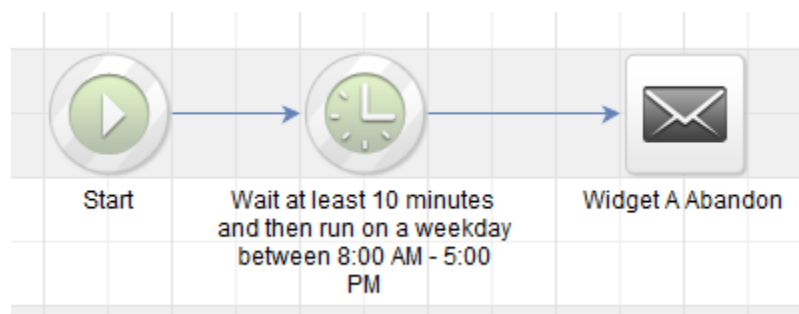
Custom Header





Back to Campaign Click to Widget A Order Form

<p>Main Sales Sequence</p> <p>Sales Email #1 <i>1 of 1 links are selected</i></p> <p>Sales Email #2 <i>0 of 0 links are selected</i></p> <p>Sales Email #3 <i>0 of 0 links are selected</i></p>	<p style="text-align: right; font-size: small;">Having trouble viewing this email? Click here</p> <div style="background-color: #333; color: white; padding: 10px; text-align: center;"> <h2 style="margin: 0;">Infusionsoft.</h2> <h1 style="margin: 0;">Success Coach Mail</h1> </div> <p>Hello Paul,</p> <p>Pretend this is a sales email and this paragraph is sales copy.</p> <p>Now, pretend that this is <input checked="" type="checkbox"/> the link to the order form for Widget A</p>
---	---



Subject: everything ok?

HTML Plain Text

Format Insert Snippets

Format Trebuchet M 12pt

Link Unlink

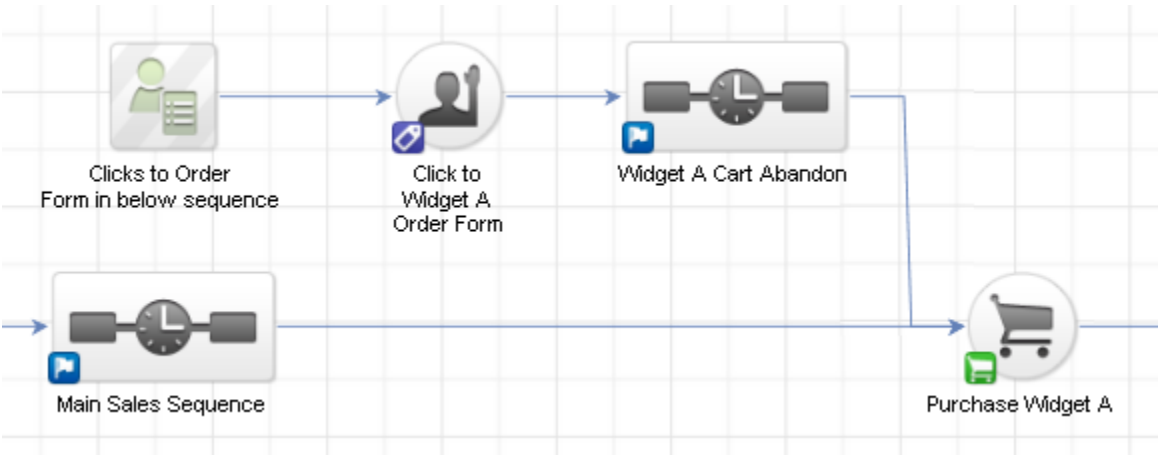
Hey ~Contact.FirstName~,

Wanted to see if you had any questions about Widget A.

Just hit reply and let me know!


Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

P.S. You can complete your purchase [here](#)



My Nav	CRM	Marketing	E-Commerce
Contacts	Contacts	Campaign Builder	E-Commerce Setup
Campaign Builder	Companies	Email & Broadcasts	Orders
Email & Broadcasts	Opportunities	Lead Generation	Products
Legacy	Referral Partners	Templates	Actions
Templates	Visitors	Legacy	Promotions
Opportunities			Legacy
Edit	Reports Settings	Reports Settings	Reports Settings

Product

-  Order Settings
- Product**
- Orders
- Billing Automation
- Sales Tax

Triggers (by type)

Choose Trigger Type

- Choose Trigger Type
- When a credit card autocharge attempt is made**
- When a credit card is going to expire
- After a successful purchase in the shopping cart or on an order form

When a credit card autocharge attempt is made
 5 - When an autocharge fails

When a credit card is going to expire

When a card of type 'Any Type' expires today

After a successful purchase in the shopping cart or on an order form

Manage Trigger

Set Trigger Criteria

When an auto charge Fails and the order contains any of these products: (leave blank to fire for any product)

And this is:

- the LAST failure (Max Retry reach)
- the FIRST failure for the invoice
- Failure #2
- Failure #3
- Failure #4
- Failure #5
- Failure #6

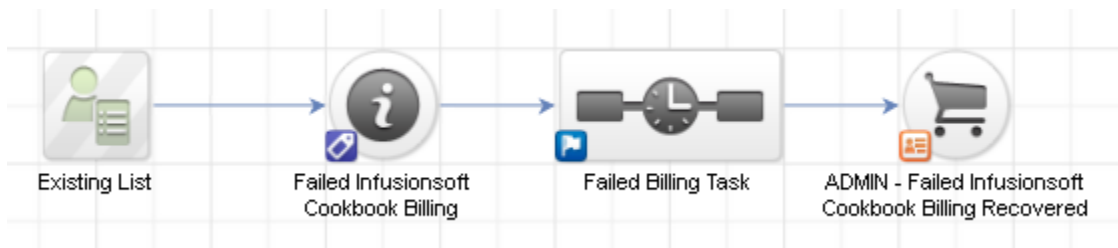
- \$100 Block
- 1 Hr. Webwork
- Epic Poster
- Infusionsoft Cookbook
 - One of a kind
 - One of a kind - Every month
- Pocket Radar
- quarterly test

Actions

Apply 1 tag

- Infusionsoft Cookbook Payment Fail

Edit x



Configure Tag

This goal is achieved when any of these tags are applied:

Functional -> Infusionsoft Cookbook Payment Fail x

Cancel Save

Configure Note Template

Action Type: Other

Description: Failed Cookbook Payment Recover

Creation Notes: Their payment for the Infusionsoft Cookbook failed and we recovered.

User: The logged-in User

Notify: Please select a User

Cancel Save



Configure Tag

Apply Remove

Functional -> Infusionsoft Cookbook Payment Fail

Cancel Save

Type: Call

Title: FAILED PAYMENT - ~Contact.FirstName~ Merge

Body:


```

    ~Contact.FirstName~ ~Contact.LastName~'s
    recent payment for the Infusionsoft
    Cookbook has failed. Call them at
    ~Contact.Phone1~ and collect payment.
    When you have successfully recovered this
    payment, apply the "ADMIN - Failed
    Infusionsoft Cookbook Billing Recovered"
    Note Template to their contact record.
    
```

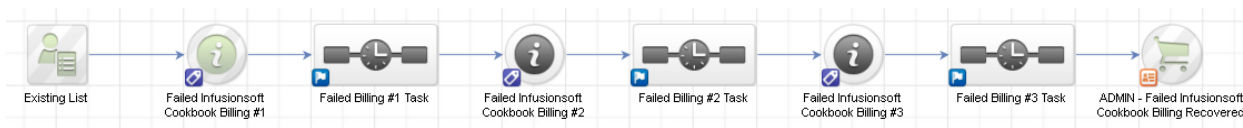
Assign to Contact's owner

Assign to (backup): Paul Sokol

Days until due: 0

Due at: Please select one

Priority: 1. Critical



Manage Trigger

Set Trigger Criteria

When an auto charge is Successful and the previous autocharge for this invoice failed and the order contains any of these products:

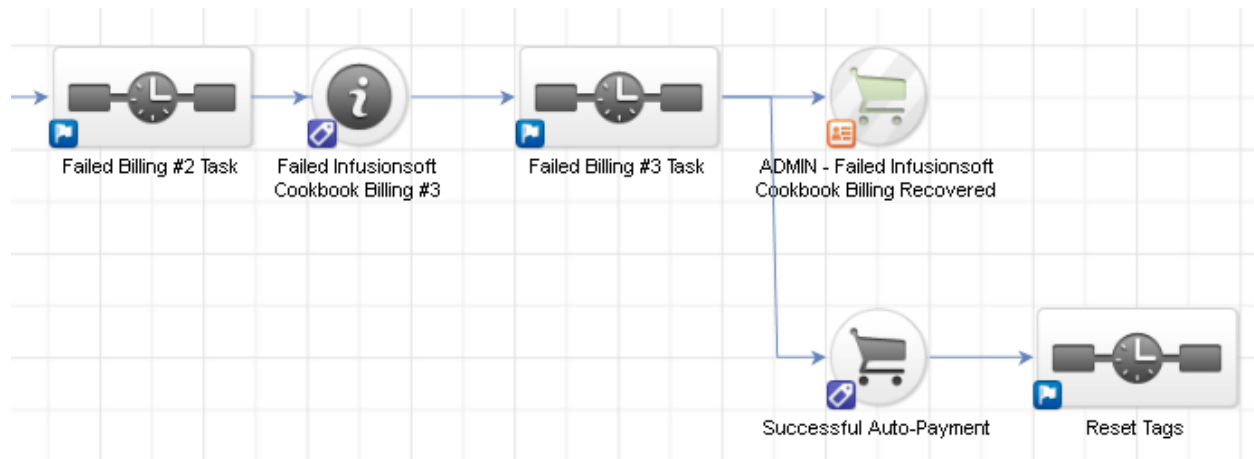
- \$100 Block
- 1 Hr. Webwork
- Epic Poster
- Infusionsoft Cookbook
- One of a kind
 - One of a kind - Every month
- Pocket Radar
- quarterly test

Actions

Apply 1 tag

- Infusionsoft Cookbook Successful Charge

Edit x



My Nav	CRM	Marketing	E-Commerce	Admin
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings



Payment

- [Payment Types](#)
- [Receipts](#)
- [Payment Plans](#)



Payment Plans

[← Back to E-Commerce Setup](#)

[Add a Payment Plan](#)

Information

Name

Description

Scheduling

Number Payments

Days Between Payments

Days Until Start

Options

Merchant Account

Over-ride Cart Merchant Account Yes No

Auto-charge Payment Plan Yes No

Days between Recharge Attempts

Max Retries

Criteria	<input type="text" value="Add Criteria"/>
Description	<ul style="list-style-type: none">Add CriteriaDate Range CriteriaPromo Code CriteriaProduct/Qty CriteriaSubscription Plan in CartOrder Total Criteria
No Criteria S	

Manage Date Range Criteria

Information

Start Date

End Date

[Save](#)

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities	Contacts Companies Opportunities Referral Partners Visitors	Campaign Builder Email & Broadcasts Lead Generation Templates Legacy	E-Commerce Setup Orders Products Actions Promotions Legacy	Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

- Marketing Settings
 - Default Thank-You Pages
 - Lead Sources
 - Automation Links
 - Action Sets
 - Follow-up Sequence
 - Follow-up Sequence Schedule

 Action sets

[Add an Action Set](#)

Manage Action Set

Action Set

[Visible To](#)

Action Set Info

Name

Infusionsoft Cookbook Upsell

Actions

No actions yet. Select an action from the "Add New Action" drop-down below.

Add New Action

- Add New Action
- Apply/remove tag
- Start/stop a campaign (legacy)
- Start/stop a follow-up sequence
- Send an email, fax, etc.
- Assign a contact to a user
- Create an appointment
- Create a task
- Create opportunity record
- Set a contact field to a specific value
- Create Referral Partner
- Apply a note template
- Cancel a subscription
- Run another action set
- Share this record with a user
- Share this record with a group of users
- Distribute record to another infusionsoft application
- Send an http post to another server
- Copy actions from a saved action set
- Create an order**

Create an Order

Bundle

Please select a bundle



[Save this Action](#) so I can customize the order details.

Payment Plan

Please select a payment plan



Free Trial Days

0

NOTE: Free Trial Days only apply to Subscription Programs!

Interests

Product



Subscription Plan



Interests

Product



Subscription Plan



Products	Price	Qty	Subtotal	Discount %	Total		
Infusionsoft Cookbook Tutorials	\$73.00	1	\$73.00	0	\$73.00	Edit...	Remove

Product



Subscription Plan



Products	Price	Qty	Subtotal	Discount %	Total	
Infusionsoft Cookbook Tutorials	\$73.00	1	\$73.00	0	\$73.00	Edit...

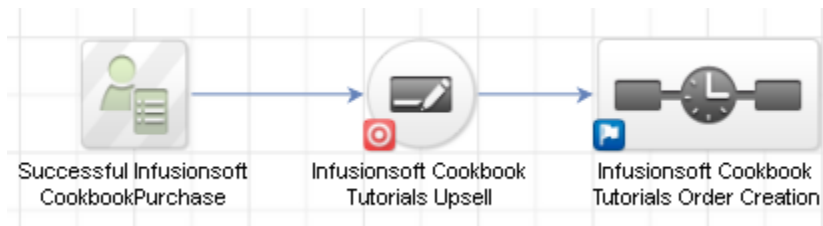
Pay Plan Id

Qty

Subtotal

Discount %

Total



Hidden Field Settings ✕

Which Field

Field Value

Congratulations! Your Infusionsoft Cookbook is on its way!

But if you really want to implement faster than you ever imagined
take advantage of this ONE-TIME ONLY offer and...

**...Get Discount Access to
Video Tutorials of EVERY RECIPE in the cookbook!!!!**

- ➔ **You get lifetime access, instantly which means you don't have to wait for the cookbook to arrive!**
- ➔ **Follow along with me as I build every recipe from scratch in real time so that you can be confident in YOUR implementation!**

Hidden Field (Email)

Hidden Field (Email)

[No thanks Paul! If I need access to this in the future
I'm ok spending the full \\$97 for the exact same video tutorials](#)

Boom!

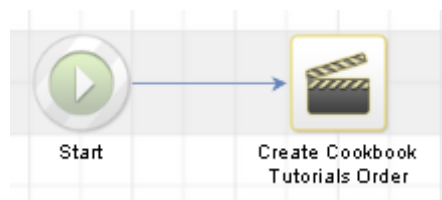
You just saved \$24 ~Contact.FirstName~, great choice :)

Check your email right now for your username and password.

Design Thank-you page Settings Code

Auto-populate Form ⓘ

Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email



Configure Action Set (Legacy) [X]

Action Set: Please select one

Legacy is stopped

(Optional) you are using

- AYIG-Survey No Talk 1
- AYIG-Survey No Talk 2
- AYIG-Survey No Talk 3
- AYIG-Survey Speak
- CH-Indicate Interest Photoshop Intermediate Lesson
- Infusionsoft Cookbook Upsell

Infusionsoft Cookbook Order Form

[← Back to Order Form List](#)

Add Products Theme HTML Areas Thank You Page Settings Links

Thank You Page to Display [?](#)

Web Address

URL:

<https://voyicks.infusionsoft.com/ap>

Pass contact's information to the Thank You Page [?](#)

[Add Products](#) [Theme](#) [HTML Areas](#) [Thank You Page](#) [Settings](#) [Links](#)

Thank You Page to Display [?](#)

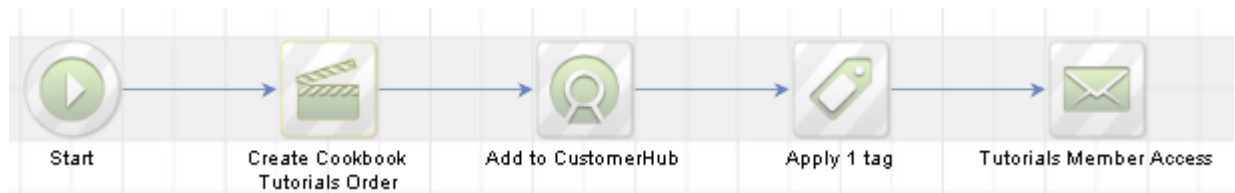
Web Address

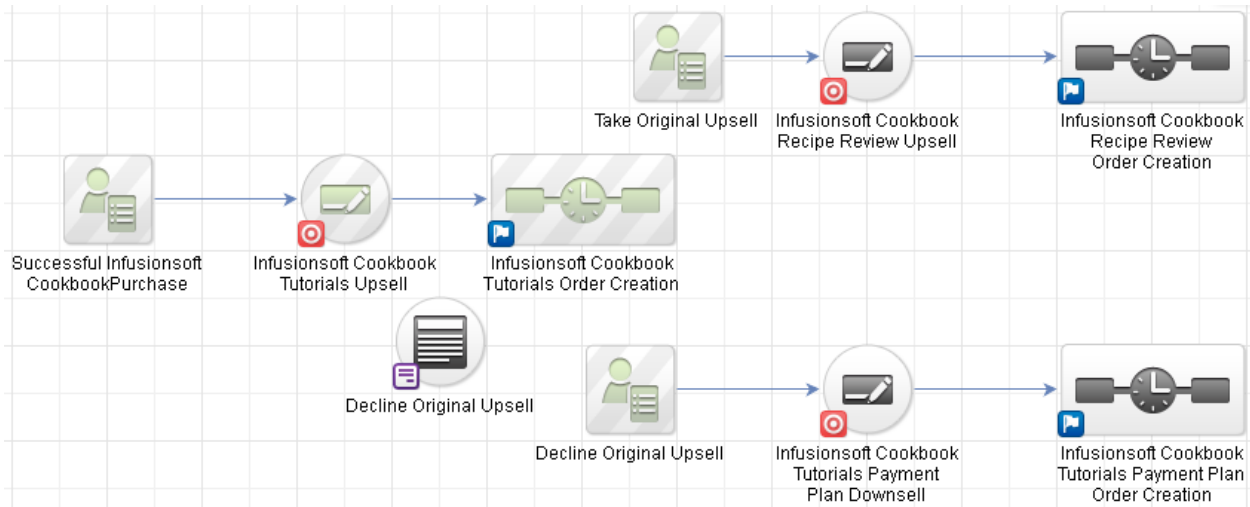
Save

URL:

<https://voyicks.infusionsoft.com/ap>

Pass contact's information to the Thank You Page [?](#)





Boom! You just saved money and got instant access to the videos!

But if **you want to be 100% confident in your implementation**
take advantage of this final offer and...

**...Get A Personal Review of Your
Recipe Implementation by Paul Himself!!!!**

I haven't done any one-on-one consulting since 2013, but
I'm making myself available at half my normal hourly rate of \$997
just this one time because you are awesome
and I'm completely dedicated to YOUR business' success :)

➔ **You get a one hour one-on-one personal consultant of your completed recipe!**

➔ **You'll also get a customized checklist of things you can do to further optimize your conversion rates!**

Hidden Field (Email)

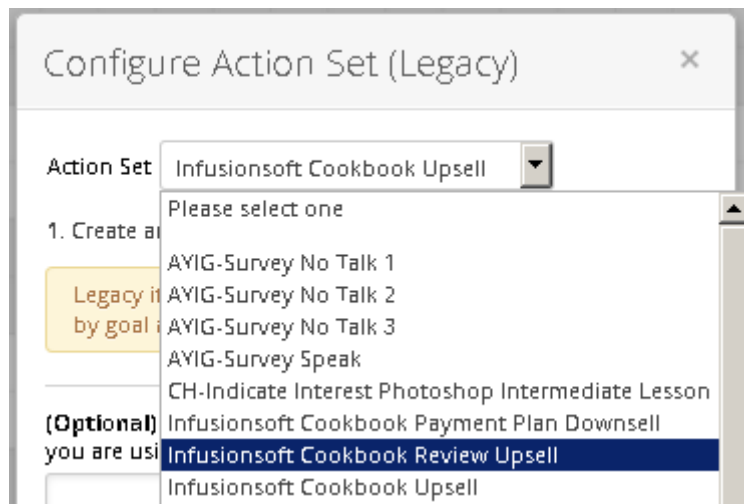
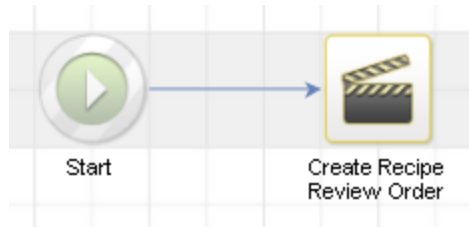
OMG Yes! Add A Personal Review To My Order For Only \$498.50!

[No thanks Paul! You're cool and all, but I think the videos will be just fine!](#)

Yeah buddy!

I'm excited to see what you end up building.

**Check your inbox right now for instructions on how to
schedule your consultation.**



URL:

<https://voyicks.infusionsoft.com/app/page/7aca34144ba0abab9de8d138e3d5a8bf>

Pass contact's information to the thank-you page ?

\$73 a bit too steep for you right now?

I'll cut you a deal so can still advantage of this ONE-TIME ONLY offer and...

**...Make Two Payments for Instant Access to
Video Tutorials of EVERY RECIPE in the cookbook!!!!**

- ➔ You get the same lifetime access, instantly which means you don't have to wait for the cookbook to arrive!
- ➔ You can still follow along with me as I build every recipe from scratch in real time so that you can be confident in YOUR implementation!

Hidden Field (Email)

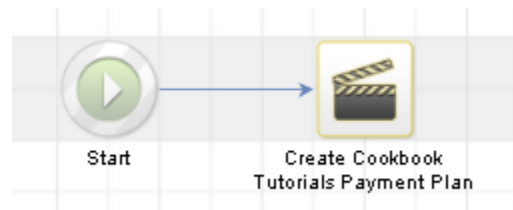
Yes! Charge Me \$36.50 Now and Another \$36.50 in 30 Days!!

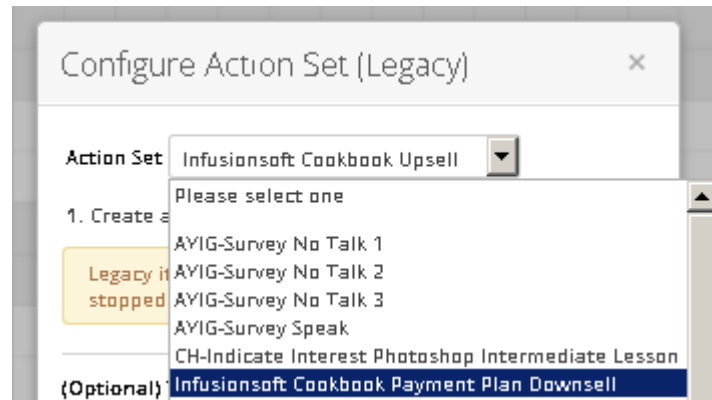
[No thanks Paul! If I need access to this in the future I'm still ok spending the full \\$97 for the exact same video tutorials](#)

You got it ~Contact.FirstName~!

I'll charge you \$36.50 now and another 36.50 in 30 days.

Check your email right now for your username and password.





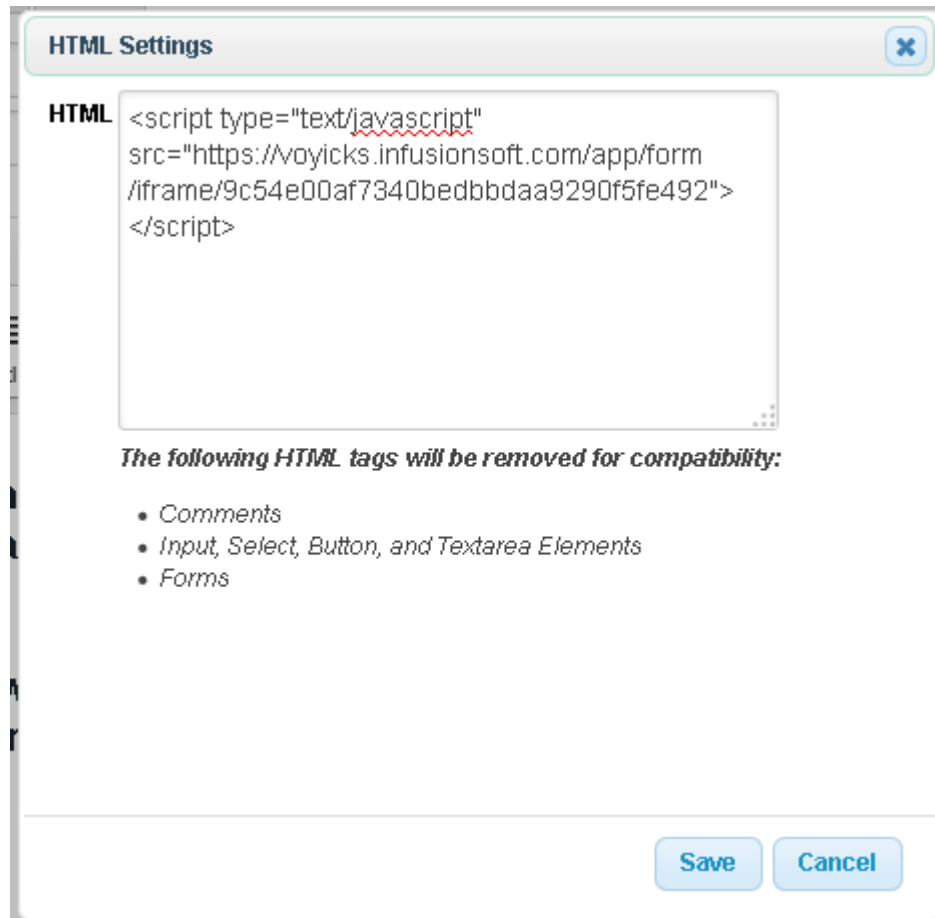
Hidden Field (Email)

No Thanks!

URL:

<https://voyicks.infusionsoft.com/app/page/5906fbafe47d43024262ccc5ec17640a>

Pass contact's information to the thank-you page [?](#)

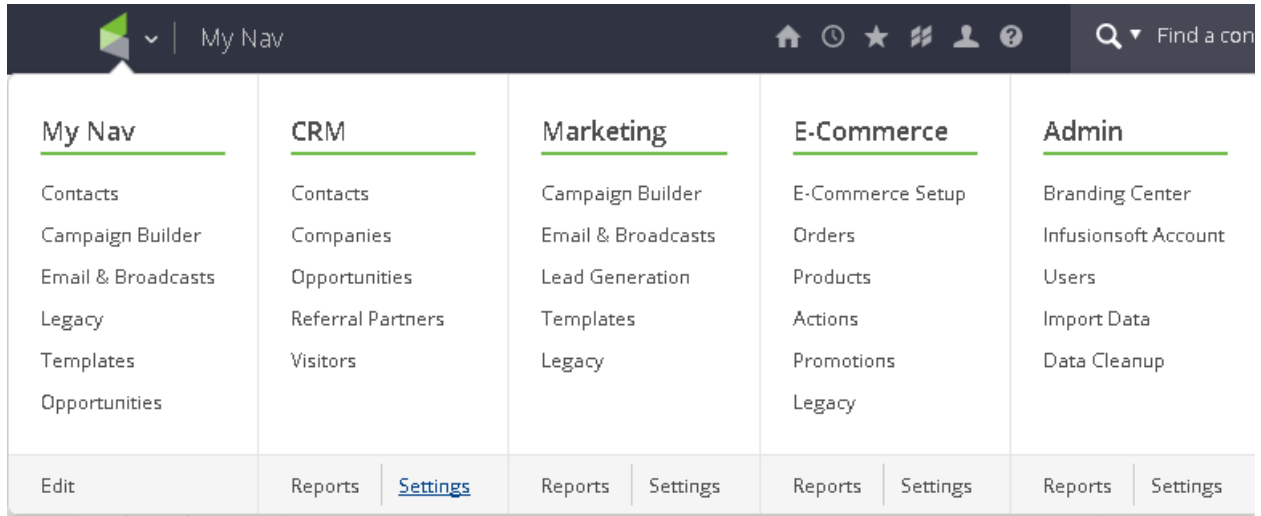


Follow along with me as I build every recipe from scratch in real time so that you can be confident in YOUR implementation!

Yes! Add This To My Order For Only \$73!

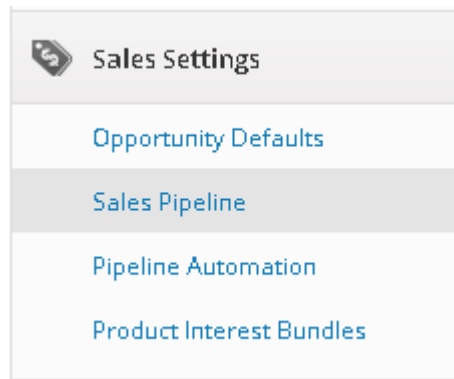
No Thanks!

Chapter 5: Selling with a Sales Team



The screenshot shows the Salesforce navigation menu with the following categories and items:




My Nav	CRM	Marketing	E-Commerce	Admin
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings



The Sales Settings dropdown menu contains the following items:


- Sales Settings
- [Opportunity Defaults](#)
- [Sales Pipeline](#)
- [Pipeline Automation](#)
- [Product Interest Bundles](#)

Stage

Name	<input type="text" value="New Opportunity"/>
Order	<input type="text" value="1000"/> 
Target # Days	<input type="text" value="1"/> 
Probability	<input type="text" value="10"/> 

[Add](#)

Edit...	New Opportunity	1	10	1000	Checklist...	Delete
Edit...	Contacting	7	25	1100	Checklist...	Delete
Edit...	Engaging	7	35	1200	Checklist...	Delete
Edit...	Qualified	7	50	1300	Checklist...	Delete
Edit...	Quote Sent	7	60	1400	Checklist...	Delete
Edit...	Quote Finalizing	7	75	1500	Checklist...	Delete
Edit...	Quote Accepted	7	95	1600	Checklist...	Delete
Edit...	Deposit Secured (Win)	0	100	1700	Checklist...	Delete
Edit...	Lost	0	0	1800	Checklist...	Delete

 **Sales Settings**

[Opportunity Defaults](#)

[Sales Pipeline](#)

[Pipeline Automation](#)

[Product Interest Bundles](#)

Active Sales Stages

Active Sales Stages:

- DOWF - Qualified
- DOWF - Sponsor Packet Sent
- DOWF - Contract Sent
- New Opportunity
- Contacting
- Engaging
- Qualified
- Quote Sent
- Quote Finalizing
- Quote Accepted
- Deposit Secured (Win)
- Lost

Default Stage:

New Opportunity

Win & Loss Stages

Win Stage:

Win Reasons: DOWF - Platinum
DOWF - Gold
DOWF - Silver
DOWF - Bronze

Require Win Reason? Yes No

Loss Stage:

Loss Reasons: DOWF - Declined

Require Loss Reason? Yes No

Sales Stage and Steps:

Move By: 4/27/2015

Stage Checklist

Checklist Item

Description

Required

Order

Add

Edit	Description	Required	Order	Delete
Edit...	Make phone call attempt	true	0	Delete

Sales Stage and Steps:

New Opportunity



Move By: 4/21/2015

Make phone call attempt *

Require Loss Reason? Yes No

Viewing Opportunities

Assigned to group: Sales Rep



Next follow-up action:

Make initial phone call to qualify

04-20-2015



03:00 PM



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

What did you do?

Called Paul and left a voicemail

Here's the next follow-up action:

Do you want to change it?

Call again to try and qualify. Left a voicemail on Monday afternoon.

Here's the next follow-up action:

Do you want to change it?

Call again to try and qualify. Left a voicemail on Monday afternoon.

04-20-2015



03:00 PM



Close or Cancel

April 2015

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Delete Select

Here's the next follow-up action:

Do you want to change it?

Call again to try and qualify. Left a voicemail on Monday afternoon.

04-22-2015



02:15 PM



Save or Cancel

Sales Stage and Steps:

Contacting

Move By: 4/21/2015

Appointments 🔄 ✕

View for on

\$	2:15PM	Paul Sokol	Voyicks Consulting
----	--------	------------	--------------------

+ New Appointment
+ New Task

Notes

[View All](#) [Note](#)

Updated	Assigned User	Details
04/21/2015	Paul Sokol	<p>Called Paul and left a voicemail</p> <p>Called Paul and left a voicemail ----- Make initial phone call to qualify</p>

Sales Stage and Steps:

Move By:

Make phone call attempt *

When will this deal close?

Commit to Forecast?



Interests

Product

Subscription Plan

Bundle

Products	Price	Qty	Subtotal	Discount %	Total	
\$100 Block	\$100.00	1	\$100.00	0	\$100.00	Edit... Remove

- Select an action
- Print a Letter
- Print a Label
- Create an Order**
- Send Buy Now

Create an Order

Create an Order

This will create a single Order for all product interests and a separate Subscription for each subscription plan interest.

Credit Card:

Save Save & Search Delete Create an Order

Tasks Scored & Recent Activity

- Select an action
- Print a Letter
- Print a Label
- Create an Order
- Send Buy Now

Buy Now

Buy Now Default Expire Days:

Buy Now Shopping Cart Skin:

Buy Now Win Reason:


Clicked Buy Now:

Purchased via Buy Now:

Quick Date 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

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities	Contacts Companies Opportunities Referral Partners Visitors	Campaign Builder Email & Broadcasts Lead Generation Templates Legacy	E-Commerce Setup Orders Products Actions Promotions Legacy	Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

 Contact & Company Settings
General
Task/Appt/Note Settings
Tags
Tag Categories
Scores
Round Robins
Action Sets

1-3 of 3		20 <input type="button" value="v"/> per page	Add Round Robin
Edit	Name	Logic	Delete
[Edit]	Default Round Robin	OnePerRound	[Delete]

Round Robin Name & Distribution Logic

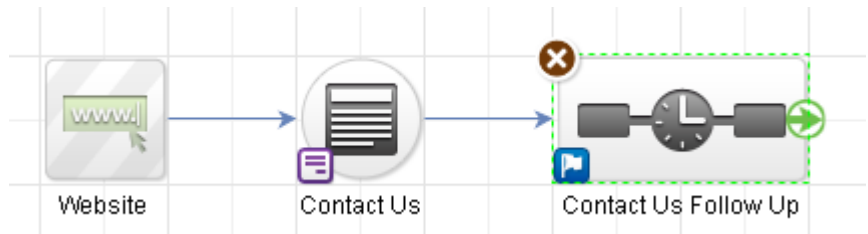
Name

Logic One record per round [?](#)
 Distribute records based on ratio [?](#)

Create Assignment Ratios

User Group

User	Number
Paul Sokol	<input type="text" value="0"/>
Paul Sokol	<input type="text" value="0"/>
Steven Gabriele	<input type="text" value="1"/>
John Odell	<input type="text" value="1"/>





Configure Opportunity

Starting Stage:

Assigned User:

Interest Bundle:

Only create if this Contact doesn't already have an active Opportunity?

Next Action Date: day(s) from now

Next Action Notes:

Configure Opportunity

Starting Stage:

Assigned User:

Interest Bundle:

Only create if this Contact doesn't already have an active Opportunity?

Next Action Date: day(s) from now

Next Action Notes:

Round Robin Name & Distribution Logic

Name

Logic One record per round [?](#)
 Distribute records based on ratio [?](#)

Configure Opportunity

Starting Stage

Assigned User

Interest Bundle

Only create if this Contact doesn't already have an active Opportunity?

Only create if this Contact doesn't already have an active Opportunity?

Configure Opportunity ✕

Starting Stage:

Assigned User:

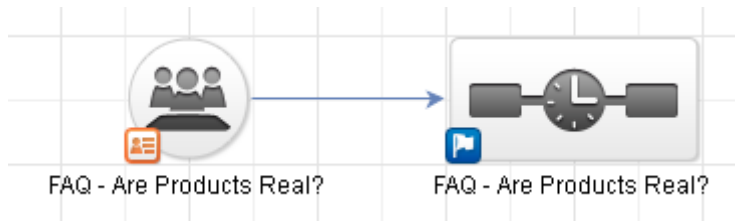
Interest Bundle:

Only create if this Contact doesn't already have an active Opportunity?

Next Action Date:

Next Action Notes:

They purchased the cookbook 2 months ago. Check in and see if they need help implementing.



Configure Note Template ✕

Action Type:

Description:

Creation Notes:

User:

Notify:



From: Paul Sokol

To: Email

Subject: are the products in my cookbook real? Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt

Link Paste as Text: Off
Unlink

B *I* U ABC A ab

Hey ~Contact.FirstName~,

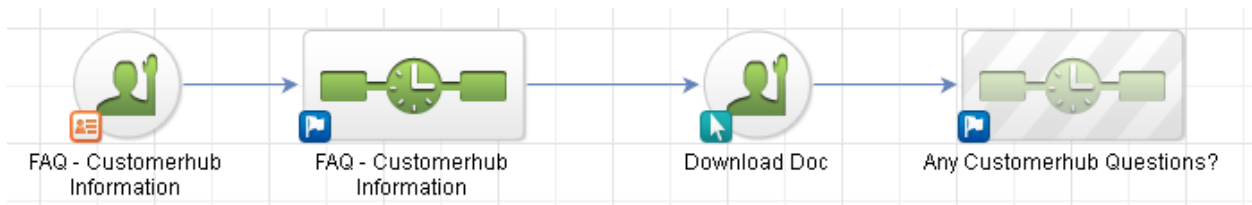
You were wondering if the products you've been reading about in chapter 4 are real.

Well...I don't know!

Seriously, I've broached the topic with the people that can approve such a thing but nothing yet.

Maybe it can have something to do with my charity ;)

Anyway, have a great ~Date.DayOfWeek~,
 ~Owner.FirstName~



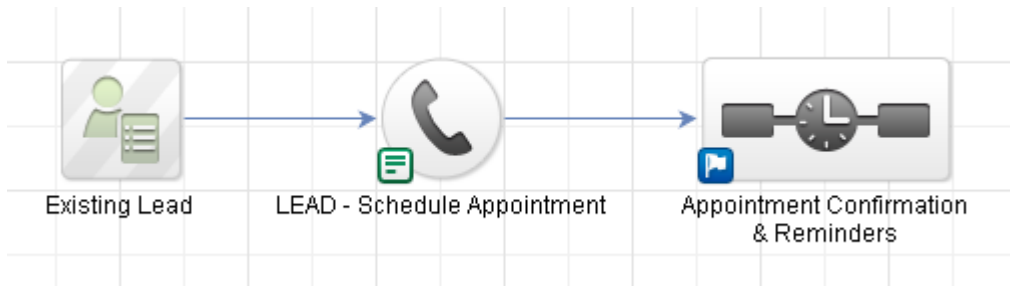
Add a Note

 Assign to different user

Template	Please select one
Action ...	FAQ - API Info
	FAQ - Campaign Builder Examples
Creation	FAQ - Customerhub Information
Notes	FAQ - Customize Thank You Page
	FAQ - Dan Kennedy Campaigns
	FAQ - GTM Sync
Type	FAQ - Infusionsoft Insider
	FAQ - List Brokers
	FAQ - Setting Up SPF Records
Notify	FAQ - Tag/Category
	FAQ - What Merchant Accounts Work?
	FAQ - Wordpress Analytics Plug-In

Creation Notes	
User	The logged-in User
Notify	The logged-in User
	John Odell
	Paul Sokol
	Paul Sokol
	Steven Gabriele

Notify	
	John Odell
	Paul Sokol
	Paul Sokol
	Steven Gabriele



LEAD - Schedule Appointment

Use this form to send automated reminders leading up to a scheduled appointment.

First Name *

Email *

Other Field Settings ✕

Which Field

Label

Required On ↔

Other Field Settings
✕

Which Field

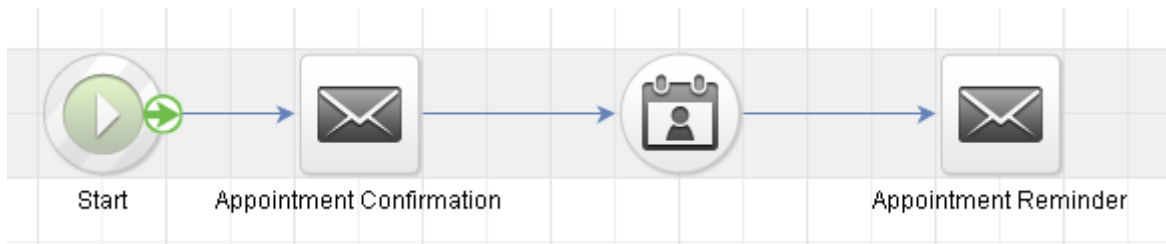
Label

Required On + +

LEAD - Schedule Appointment

Use this form to send automated reminders leading up to a scheduled appointment.

First Name *	<input style="width: 90%;" type="text"/>
Email *	<input style="width: 90%;" type="text"/>
Appointment Date *	<input style="width: 60%;" type="text"/>
Appointment Time *	<input style="width: 90%;" type="text"/>



Subject: [CONFIRMATION] Your Appt. for ~Contact._AppointmentDate- at ~Contact._Appoint Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt

B **I** **U** ABC A ab

Link Unlink Paste as Text: Off

Hello ~Contact.FirstName~,
Thank you so much for booking an appointment with me!
I'll talk to you ~Contact._AppointmentDate~ at ~Contact._AppointmentTime~.
In the meantime, if you have any questions just hit reply :)
Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

Configure Field Timer

Summary
Wait until 1 day before the contact's Appointment Date and then run at 8:00 AM (GMT -07:00) Phoenix

Wait Until	Contact Field	At
1 <input type="text"/> Day(s)	Appointment Date	8 <input type="text"/> 00 <input type="text"/> AM
Before <input type="text"/>	Use year from field <input type="text"/>	

Cancel Save

Subject: Merge

HTML Plain Text

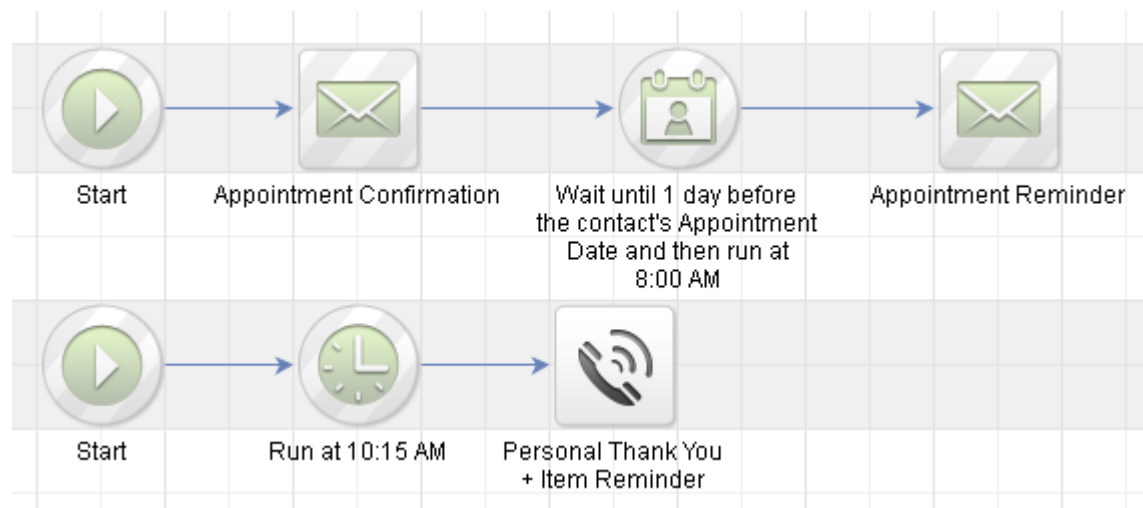
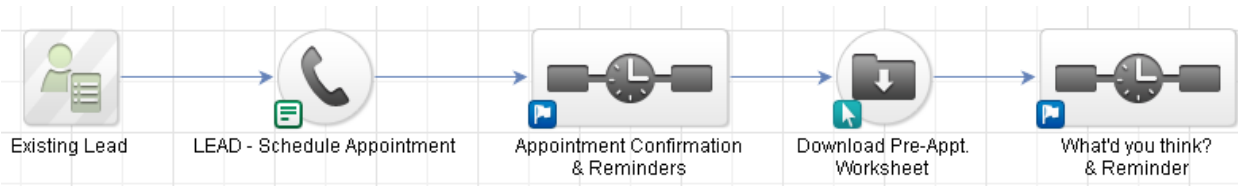
Format Insert Snippets

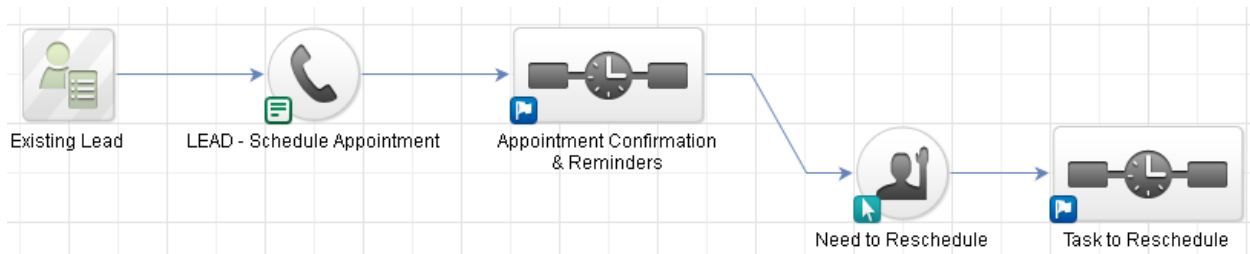
Format Trebuchet MS 12pt

B *I* U ABC A ab


Link Unlink Paste as Text: Off

Good morning ~Contact.FirstName~,
 Thanks again for booking an appointment with me!
 I'm excited to talk to you tomorrow at ~Contact._AppointmentTime~.
 If you have any questions before then, just hit reply :)
 See you tomorrow,
 ~Owner.FirstName~





<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

 **Sales Settings**

- [Opportunity Defaults](#)
- [Sales Pipeline](#)
- [Pipeline Automation](#)
- [Product Interest Bundles](#)

Triggers (by type)
When moving from one stage to another

Manage Trigger

Set Trigger Criteria [?](#)

When moving stage

Actions
No actions yet. Select an action from the "Add New Action" drop-down below.

- Win
- Lost
-
- DOWF - New Sponsor Opp
- DOWF - Contacting
- DOWF - Engaging
- DOWF - Qualified
- DOWF - Sponsor Packet Sent
- DOWF - Contract Sent
- New Opportunity
- Contacting
- Engaging
- Qualified
- Appointment Scheduled**
- Appointment Completed
- Quote Sent
- Quote Finalizing
- Quote Accepted
- Deposit Secured (Win)
- Lost

Actions

No actions yet. Select an action from the "Add New Action" drop-down below.

- Add New Action
- Apply/remove tag
- Start/stop a campaign (legacy)
- Start/stop a follow-up sequence
- Send an email, fax, etc.**

Send an Email, Fax, etc.

What do you want to send?

Please select an activity

- Please select an activity
- Email
- Fax
- Voice Broadcast
- Letter
- Fulfillment List
- Queued Fulfillment List
- Appointment

What do you want to send?

Email

Show templates in ALL categories (Categories) Please select a template (Templates) Edit Add

Only run this action when certain rules are met

Template Options

Title: SALES - "Appointment Scheduled"

Public/Private: Public

Compose Email

Other... ▾

From: **Name (Optional):** **Email Address:**

To: The contact's primary email address [\(Change\)](#) [Add CC](#) | [Add BCC](#)

Subject: [Merge](#) [?](#)

Subject:

Send As: HTML (graphics & colors) Plain Text (no graphics) HTML & Plain Text




[Edit Email Body](#) ▾



Format **Insert** Snippets

 Image  Table  Divider

 Merge Fields  Special chars

Format **Insert** Snippets

 Image  Table  Divider

 Merge Fields  Special chars

Merge Fields X

< **Opportunity fields**

- Id
- Edit Page
- Opportunity Title
- Next Action Date
- Date In Stage
- Buy Now Link

Hello ~Contact.FirstName~,
I'm looking forward to our appointment on ~Lead.NextActionDate~
Create a great ~Date.DayOfWeek~,
~Owner.FirstName~ ~Owner.LastName~

Email Readiness

Ready to Send?

Yes ⇄



This will not be sent until it has been marked as ready.

Send an Email, Fax, etc.

What do you want to send?

Email

Show templates in ALL categories

(Categories)

SALES - "Appointment Scheduled"

(Templates)

Edit

Add

Only run this action when certain rules are met

Save

Cancel

Actions

Send an *Email* using the "SALES - "Appointment Scheduled" (Email) " template


Add New Action

Save Trigger

Delete Trigger

Merge Fields	
<	Credit Card fields
	Id
	HTML Update Link
	Plain Text Update Link
	Card Type
	Expiration Month
	Expiration Year
	Last 4
	Name On Card
	First Name
	Last Name
	Middle Name
	Company Name
	Bill Name
	Bill Address 1

Orders

 Order Settings
Product
Orders
Billing Automation
Sales Tax

Countries


Default Country:

Invoice

Default Order Invoice Template: [Edit](#) [Add](#)

Merge Fields		X
Owner Fields (additional)	>	▲
Logged-in User Fields (most common)	>	
Logged-in User Fields (additional)	>	
Your Company Fields (most common)	>	
Your Company Fields (additional)	>	
Works With	>	
Referral Partner Fields	>	
Referral Partner's Fields	>	
Invoice fields	>	
Billing Address fields	>	
Shipping Address fields	>	
Order fields	>	
Subscription fields	>	
Date	>	
Digital Products	>	▼

All Contact & Company Settings

 Contact & Company Settings
General
Task/Appt/Note Settings
Tags
Tag Categories
Scores

Company

Minimum Account # Length:

Contact

Contact Types:

Name & Status

Name

Score is On ↔ ?

Name & Status

Name

Score is On ↔ ?

↕ points equals 5 flames.

Criteria	Points
If the Contact's Activity contains <input type="text" value="Web Form Submission x"/>	<input type="text" value="+25"/> ↕
<input type="text" value="Web Form Submission x"/>	<input type="text" value="+25"/> ↕
	<input type="text" value=".."/> ↕ Never - +

Criteria	Points
If the Contact's Activity contains <input type="text" value="Web Form Submission x"/>	<input type="text" value="+25"/> ↕
If the Contact's Activity contains <input type="text" value="Email Open x"/>	<input type="text" value="+5"/> ↕

Rules

Criteria	Points
If the Contact's Activity contains <input type="text" value="Web Form Submission x"/>	+25 <input type="text" value=""/>
If the Contact's Activity contains <input type="text" value="Email Open x"/>	+5 <input type="text" value=""/>
If the Contact's Activity contains <input type="text" value="Link Click x"/>	+10 <input type="text" value=""/>

Rules


Criteria	Points
If the Contact's Activity contains <input type="text" value="Web Form Submission x"/>	+25 <input type="text" value=""/>
If the Contact's Activity contains <input type="text" value="Email Open x"/>	+5 <input type="text" value=""/>
If the Contact's Activity contains <input type="text" value="Link Click x"/>	+10 <input type="text" value=""/>
If the Contact's Activity contains <input type="text" value="Email Unsubscribe x"/>	-100 <input type="text" value=""/>

Save

Account Summary

Amt Paid \$0.00
Bal Due \$0.00

Score

Opportunity Scoring 

Rules

Criteria

If the **Contact's** **Tags** contains Amiable x Analytical x
Driver x Expressive x

Criteria	Points	Expiration
If the Contact's Activity contains Web Form Submission x	+25	4 Weeks
If the Contact's Activity contains Email Open x	+5	1 Week
If the Contact's Activity contains Link Click x	+10	2 Weeks
If the Contact's Activity contains Email Unsubscribe x	-100	Never

Contacts

[General](#) [Address](#) [Phone/Email](#) [Custom Fields](#)

Search Criteria

First Name starts with

Last Name starts with

Company starts with

Email starts with

Opportunity Scoring equals

Name & Status

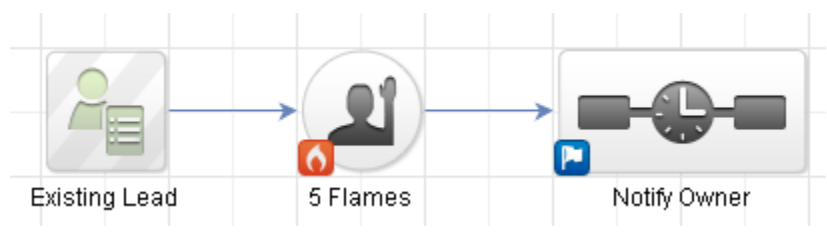
Name

Score is **On**

points equals 5 flames.

Update recent activity when scores reach

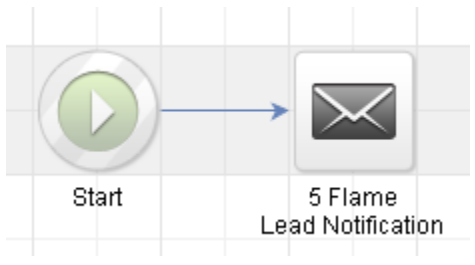
Enabling this feature will update recent activity feeds when contacts reach the selected score level.



Configure Score

Choose the score level that will complete this goal:

Score to or more flames.



From: Other...
 Name (Optional): Lead Bot Email Address: no-reply@infusionsoft.com
 To: Other...
 Name (Optional): ner.FirstName- -Owner.LastName- Email Address: -Owner.Email-
 Subject: [SUPER HOT LEAD] Call ~Contact.FirstName~ at ~Contact.Phone1~ ASAP!

Subject: [SUPER HOT LEAD] Call ~Contact.FirstName~ at ~Contact.Phone1~ ASAP! Merge

HTML Plain Text

Format Insert Snippets

Format Font family Fontsize Link Paste as Text: Off
 Unlink

Hey ~Owner.FirstName~,

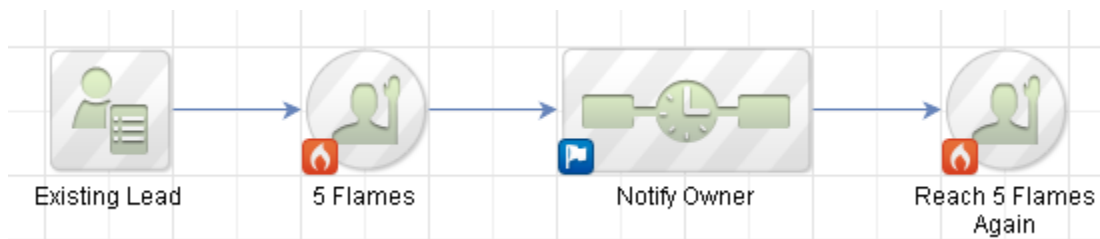
Your lead ~Contact.FirstName~ ~Contact.LastName~ just hit the maximum lead score, which means they are really engaging with our marketing.

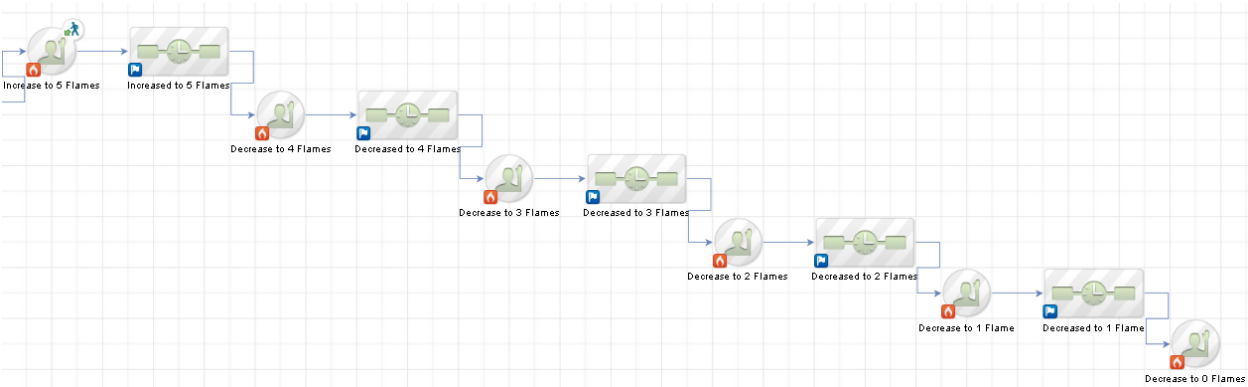
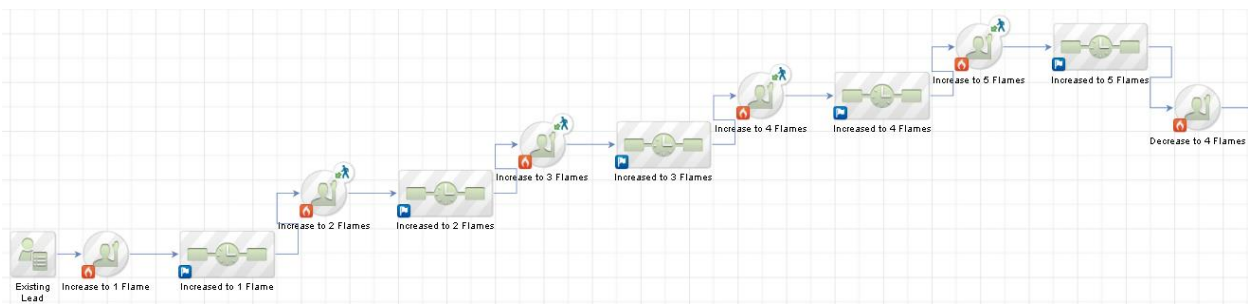
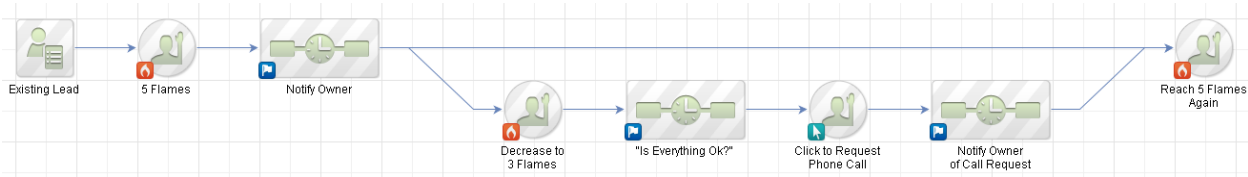
Give them a call at ~Contact.Phone1~ ASAP.

Remember to update their Opportunity record after you attempt to call them, whether you reach them or not.







[~Contact.EditPage~](#)

Beep beep,
 Lead Bot





Campaign Merge Fields

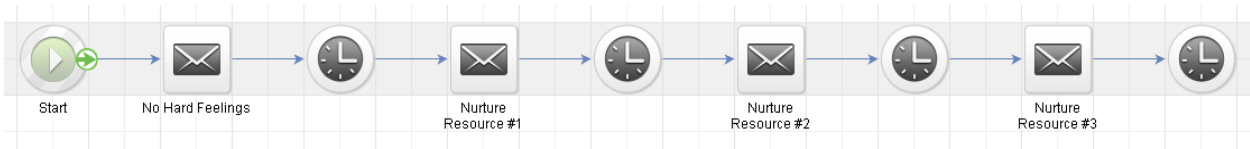
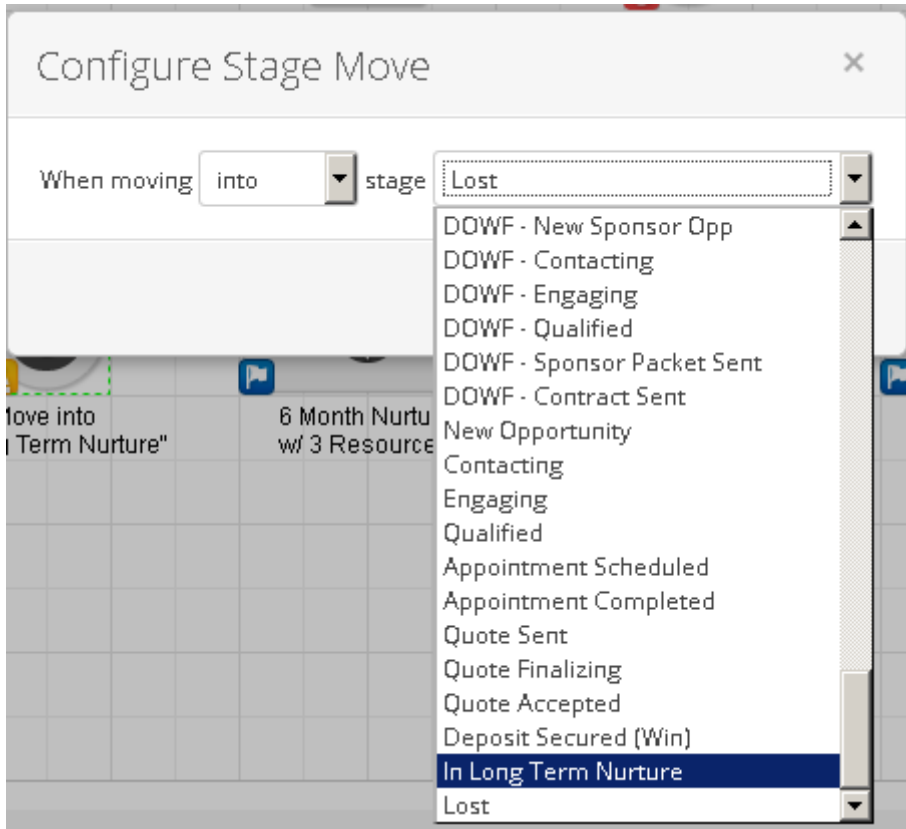
Merge Field Label	Merge Field Value	Add Merge Field
Long Term Nurture - Resource #1	Business-In-A-Box Campaign	 
Long Term Nurture - Resource #2	Build an Email Preference Center	 
Long Term Nurture - Resource #3	Do's and Dont's of Campaign Builder	 

Campaign Links



Add Link

Name	URL	Description	Actions
Long Term Nurture - Resource #1	http://marketplace.infusionsoft.com/campaign/business-box	A three campaign package any business can customize to Attract, Sell and Wow.	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Long Term Nurture - Resource #2	http://help.infusionsoft.com/mastermind/build-a-true-email-preferences-center	A mastermind call about how to build an email preferences center natively without using tags.	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Long Term Nurture - Resource #3	https://www.youtube.com/watch?v=7PuIDPjr0rY	A rare glimpse into some of the top tactics and strategies used to create world-class automated experiences.	<input type="button" value="Edit"/> <input type="button" value="Delete"/>



Subject: No hard feelings :) Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt Link Paste as Text: Off

B *I* U ABC Unlink

Hey ~Contact.FirstName~,

I get it. Now just isn't the right time and that's ok. My services aren't going anywhere so feel free to loop back to me sometime in the future.

Heads up: every once in a while (like every month or so) I'll drop you a line to touch base and share a resource I believe will help you further decide if what I have to offer is right for you. Nothing sales-y at all, just great information!

Until next time,
~Owner.FirstName~

Configure Delay Timer ✕

Summary
Wait at least 2 months and then run on a weekday at 8:00 AM (GMT -07:00) Phoenix

Wait at least	Run on	<input checked="" type="radio"/> At <input type="radio"/> Between
2 <input type="text"/> <input type="text"/> Month(s)	Weekday <input type="text"/>	8 <input type="text"/> 00 <input type="text"/> AM <input type="text"/>

Cancel Save

Subject: As promised...

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet MS

12pt



Link



Paste as Text: Off



Unlink

Good morning ~Contact.FirstName~!

I trust life has good since we last chatted. As promised, here is the first resource you might be interested in checking out.

Its called "~Campaign.MergeField_1180~" and, while you can't implement it before we start working together, it should give you an idea of how we've taken the ENTIRE customer life cycle and simplified it for ANY industry.

[Check out "~Campaign.MergeField_1180~"](#)

Until next time,

~Owner.FirstName~

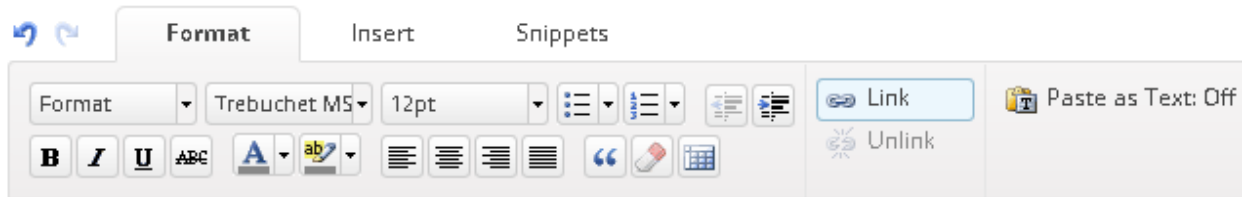
Its called "~Campaign.MergeField_1180~" and, while you can't implement it before we start working together, it should give you an idea of how we've taken the ENTIRE customer life cycle and simplified it for ANY industry.

[Check out "~Campaign.MergeField_1180~"](#)

Until next time,

~Owner.FirstName~

P.S. If you are ready to chat about what I can do for your business, click here and I'll contact you ASAP!



Its called "~Campaign.MergeField_1180~" and, while you can't implement it before we start working together, it should give you an idea of how we've taken the ENTIRE customer life cycle and simplified it for ANY industry.

[Check out "~Campaign.MergeField_1180~"](#)

Until next time,
~Owner.FirstName~

P.S. If you are ready to chat about what I can do for your business, [click here](#) and I'll contact you ASAP!

Link Options

Link to:

Web address

Web address

Email address

Thank-you page

You got it!

**I'm really happy to hear you are ready
to explore this again.**

I'll give you a call as soon as I can :)

Its called "~Campaign.MergeField_1180~" and, while you can't implement it before we start working together, it should give you an idea of how we've taken the ENTIRE customer life cycle and simplified it for ANY industry.

[Check out "~Campaign.MergeField_1180~"](#)

Until next time,

~Owner.FirstName~

P.S. If you are ready to chat about what I can do for your business, [click here](#) and I'll contact you ASAP!

Subject: What are your preferences ~Contact.FirstName~?

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet MS

12pt



Link

Paste as Text: Off



Unlink

I trust ~Date.Month~ is coming along nicely.

Or maybe not :(

Which is why I'm excited to share another valuable resource. Its called "~Campaign.MergeField_1182~" and its one of my classic mastermind calls where I show how to create a great email subscription experience (without using tags if you know what those are).

[Check out "~Campaign.MergeField_1182~"](#)

Until next time ~Contact.FirstName~,
~Owner.FirstName~

P.S. If you are ready to chat about what I can do for your business, [click here](#)
[and I'll contact you ASAP!](#)

[Back to Campaign](#)

Please Contact Me

6 Month Nurture w/ 3 Resources

No Hard Feelings
0 of 3 links are selected

Nurture Resource #1
1 of 3 links are selected

Nurture Resource #2
1 of 3 links are selected

Nurture Resource #3
1 of 3 links are selected

Good morning Paul!

In all skills, there are things that the experts know to do and also, sometimes more importantly, what NOT to do.

How to use the tools in a masterful way.

As an automated experience expert, and as someone that's been using Infusionsoft more than 20% of my life, I wanted to prove to you I definitely KNOW my way around the Campaign Builder.

This is a rare non-Infusionsoft webinar appearance called "Do's and Dont's of Campaign Builder". For about 90 minutes, Kim Snider's tribe gets the lid blown off of any trick or tip I could think of. And yeah, the Q&A at the end is great too ;)

[Check out "Do's and Dont's of Campaign Builder"](#)

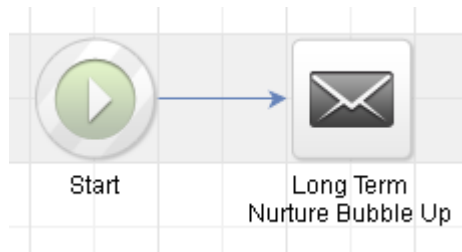
Enjoy your Thursday,
Paul

P.S. If you are ready to chat about what I can do for your business,

[click here and I'll contact you ASAP!](#)

[Update Your Information or Unsubscribe](#)

124 N California St. Unit 22 Chandler, Arizona 85225 United States



From: Other...

Name (Optional):

Lead Bot

Email Address:

no-reply@infusionsoft.com

To: Other...

Name (Optional):

-Owner.FirstName- -Owner.LastN:

Email Address:

-Owner.Email-

Subject: [BUBBLE UP] Call -Contact.FirstName- at -Contact.Phone1- ASAP!

Merge

Subject: [BUBBLE UP] Call ~Contact.FirstName~ at ~Contact.Phone1~ ASAP! Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt Link Paste as Text: 0

B *I* U ABC

Hey ~Owner.FirstName~,

Your lead ~Contact.FirstName~ ~Contact.LastName~ just responded to the long term nurture and request a call.

So give them a call at ~Contact.Phone1~ ASAP!

Remember to update their Opportunity record after you attempt to call them, whether you reach them or not.

[~Contact.EditPage~](#)

Beep beep,
Lead Bot

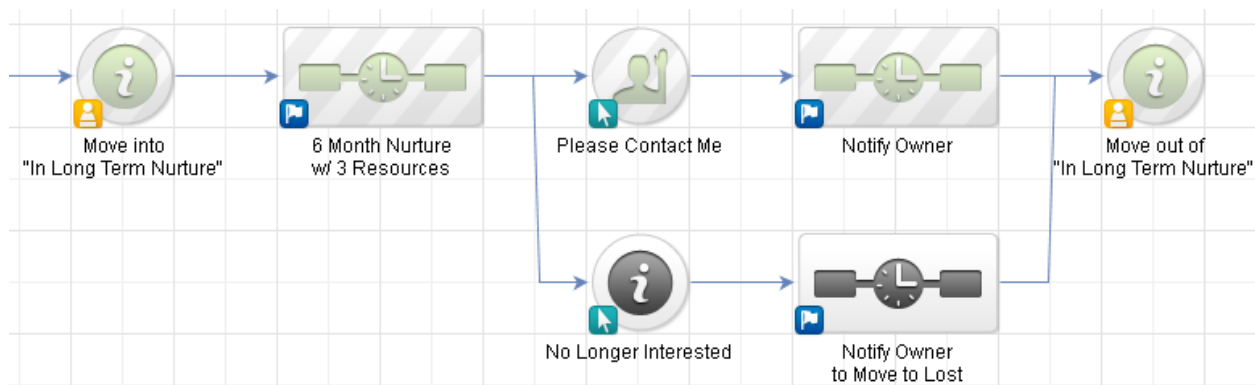
Configure Stage Move

When moving out of stage

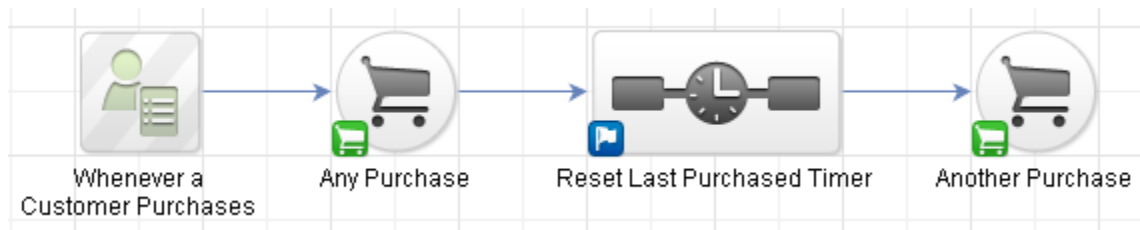
- DOWF - New Sponsor Opp
- DOWF - Contacting
- DOWF - Engaging
- DOWF - Qualified
- DOWF - Sponsor Packet Sent
- DOWF - Contract Sent
- New Opportunity
- Contacting
- Engaging
- Qualified
- Appointment Scheduled
- Appointment Completed
- Quote Sent
- Quote Finalizing
- Quote Accepted
- Deposit Secured (Win)
- In Long Term Nurture**

P.S. If you are ready to chat about what I can do for your business, [click here](#) and I'll contact you ASAP!

P.P.S. And listen, if you *really* aren't considering me anymore, save us both time and [click here](#). No hard feelings :)



Chapter 6: Wowing New Customers with Great Experiences



Configure Purchase

Any Purchase Specific Product Purchase Product in Specific Category Purchase

Goal Settings

This goal is achieved when a Contact...

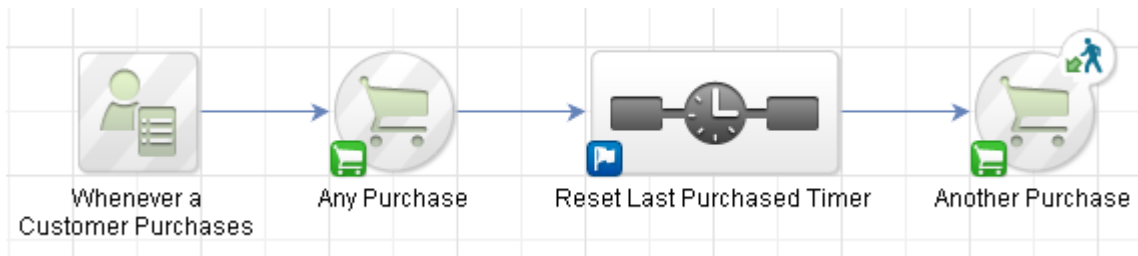
Purchases a Product

This goal can be achieved by...

Contacts in this Campaign

Contacts in this Campaign

Any Contact



Configure Tag ✕

Apply Remove

Last Purchased -> Within 30 Days ✕

Cancel Save

Configure Tag ✕

Apply Remove

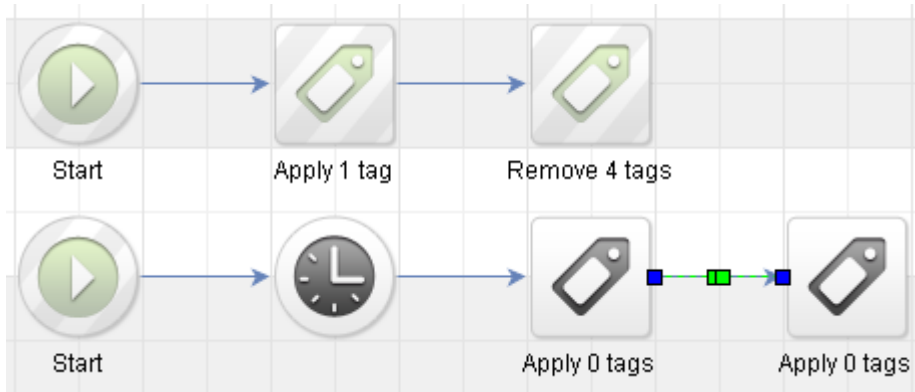
Last Purchased -> Within 180 Days - 1 Year ✕

Last Purchased -> Within 30 - 90 Days ✕

Last Purchased -> Within 90 - 180 Days ✕

Last Purchased -> Over 1 Year Ago ✕

Cancel Save



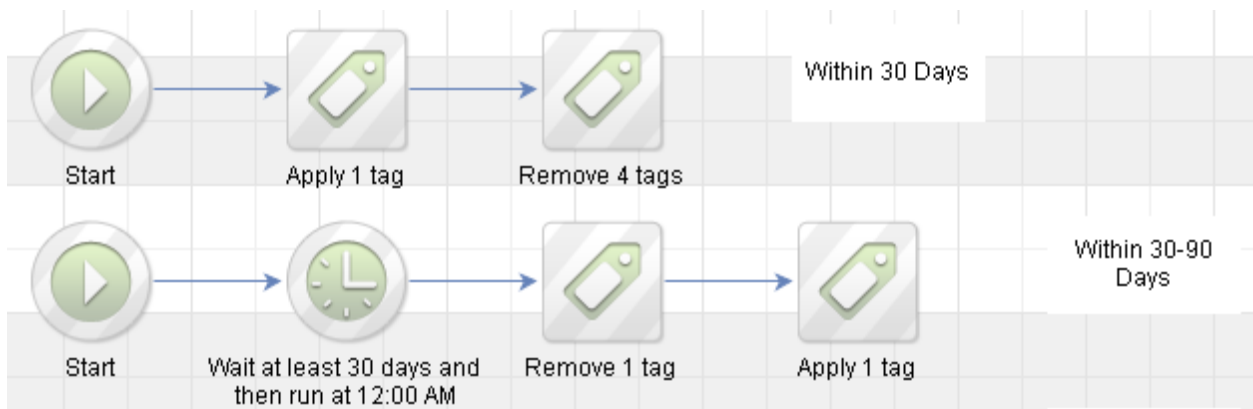
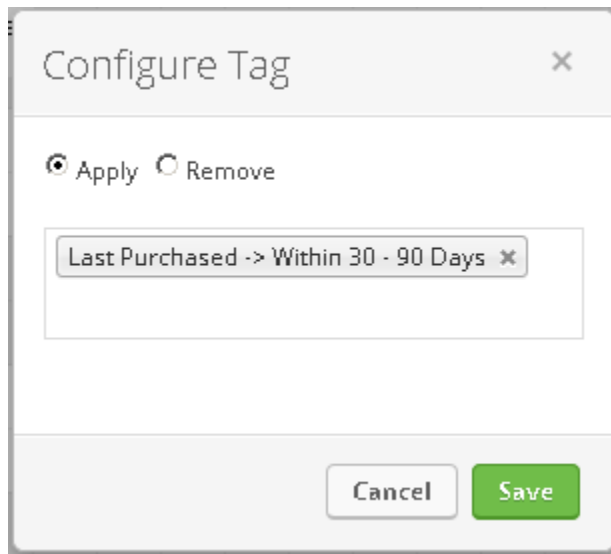
Configure Delay Timer ×

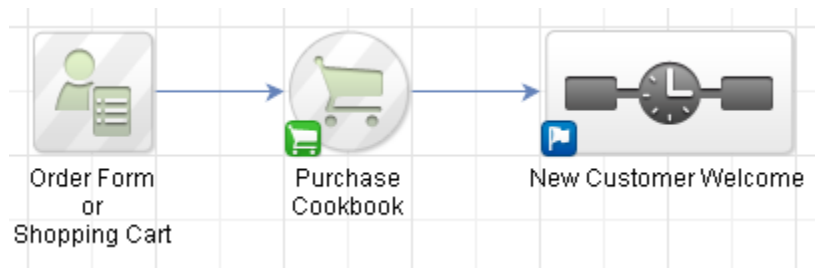
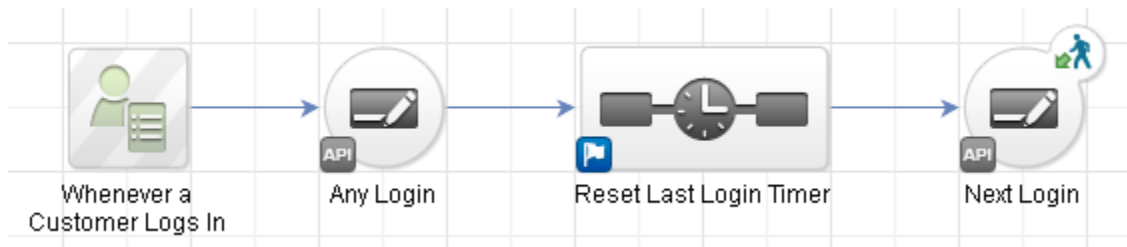
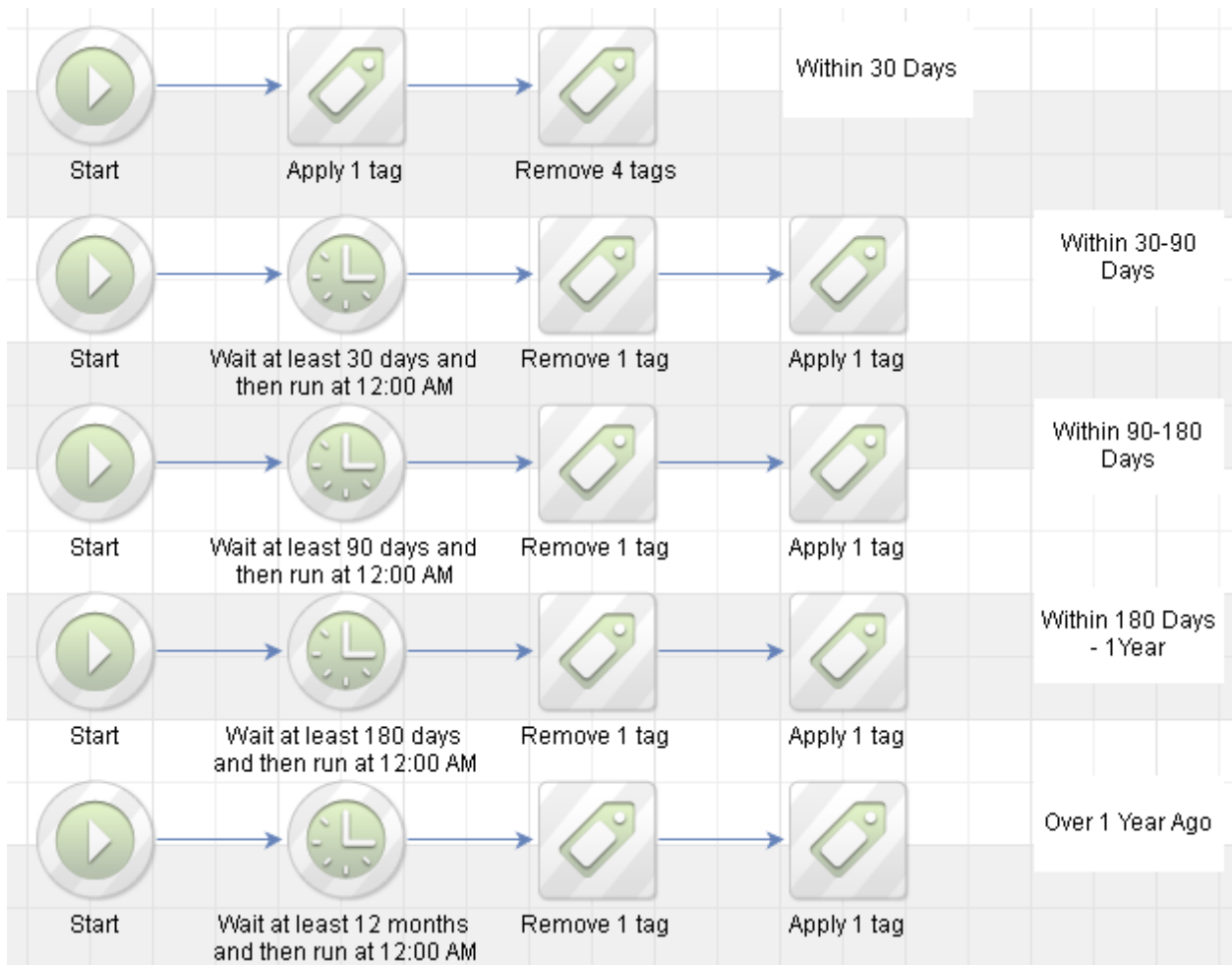
Summary
Wait at least 30 days and then run at 12:00 AM (GMT -07:00) Phoenix

Wait at least <input type="text" value="30"/> <input type="text" value="Day(s)"/>	Run on <input type="text" value="Any Day"/>	<input checked="" type="radio"/> At <input type="radio"/> Between <input type="text" value="12"/> <input type="text" value="00"/> <input type="text" value="AM"/>
---	---	--

Configure Tag ×

Apply Remove





Configure Purchase

Any Purchase
 Specific Product Purchase
 Product in Specific Category Purchase

Please select one

 Please select one

 \$100 Block

 1 Hr. Webwork

 Epic Poster

Infusionsoft Cookbook



Subject:

Format Insert Snippets

Format Trebuchet MS 12pt [List Icons] [Link] [Paste as Text: Off]

B *I* U ABC A ab [Align Icons] [Quote] [Eraser] [Table] [Unlink]

Thank you so much for buying the Infusionsoft Cookbook
 ~Contact.FirstName~!

You should have had a chance to download it from the order confirmation page, but if something weird happened and you didn't get it, reply and let me know so I can make things right.

From here, the best course of action is to read it and start implementing in your own business.

Have a great ~Date.DayOfWeek~ and thanks again,
 Paul Sokol

Configure Delay Timer



Summary

Wait at least 7 days and then run at 8:00 AM (GMT -07:00) Phoenix

Wait at least

7 Day(s)

Run on

Any Day

At Between

8 00 AM

Cancel

Save

Subject: Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet M 12pt Link Paste as Text: Off
Unlink

B *I* U ABC

Thanks again for buying the Infusionsoft Cookbook ~Contact.FirstName~!

By now, you've most likely thumbed through it and have begun working on a recipe or two. Or maybe you dove in head first and have LOTS of stuff built.

Or maybe none of that :(

Just wanted to remind you that we all win together, and we all lose together. Nothing in between.

In other words, if you are getting stuck or need help, hit reply and let me know. I and my team will see what we can do!

We're here to help,
Paul Sokol

Configure Delay Timer

Summary
Wait at least 23 days and then run at 8:00 AM (GMT -07:00) Phoenix

Wait at least <input type="text" value="23"/> <input type="text" value="Day(s)"/>	Run on <input type="text" value="Any Day"/>	<input checked="" type="radio"/> At <input type="radio"/> Between <input type="text" value="8"/> <input type="text" value="00"/> <input type="text" value="AM"/>
---	---	---

Cancel Save

Subject:

HTML Plain Text

Format Insert Snippets

Format Trebuchet M: 12pt

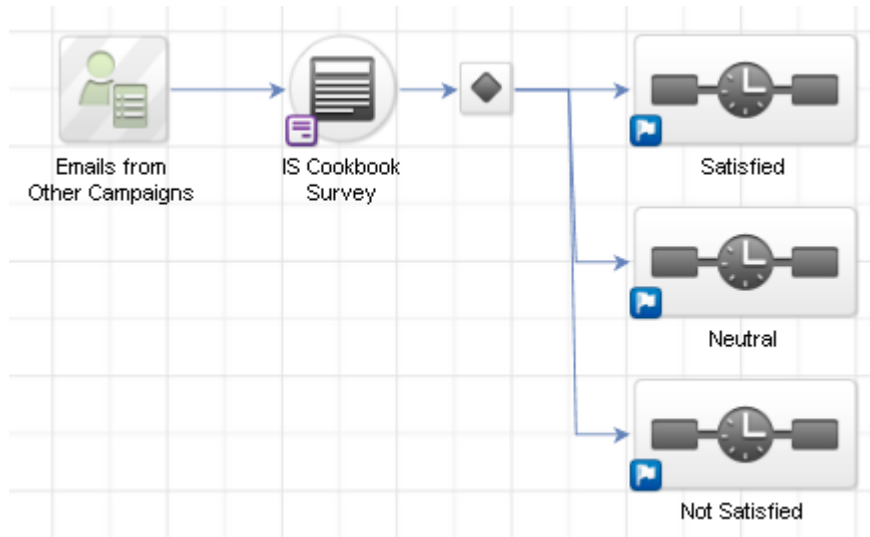
B *I* U ABC Paste as Text: Off

Thanks again for buying the Infusionsoft Cookbook ~Contact.FirstName~!

Did you know that there is a very active community of folks just like you on Facebook?

In other words, if you are still getting stuck or need help, all you have to do is [click here and join the conversation on Facebook](#).

Your community is here to help,
Paul Sokol



Hidden Field Settings ✕

Which Field

Field Value



**Thanks for buying the Infusionsoft
Cookbook!**

**We'd love for you to take our Super
Quick One Click™ customer survey
below:**

Hidden Field (Email)

Radio Settings

Label

Radio Settings

Label

Options

Radio Settings ✕

Label

Options

 Don't select an option by default



**Thanks for buying the Infusionsoft
Cookbook!**

**We'd love for you to take our Super
Quick One Click™ customer survey
below:**

- How satisfied with the
cookbook are you?
- Satisfied
 - Neutral
 - Not Satisfied

Hidden Field (Email)

Here's My Feedback!



Thanks for your feedback, ~Contact.FirstName~!

Design

Thank-you Page

Settings

Code

Auto-populate Form ⓘ

Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email

[Back to Campaign](#)

IS Cookbook Survey's Decision

Rules for: Satisfied

If the [Form Submission's](#) [Option](#) [How satisfied with the cookbook are you? - Satisfied](#) is selected

+ AND

+ RULE

Rules for: Neutral

If the [Form Submission's](#) [Option](#) [How satisfied with the cookbook are you? - Neutral](#) is selected

+ AND

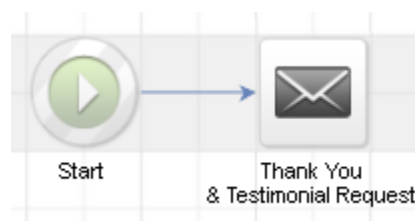
+ RULE

Rules for: Not Satisfied

If the [Form Submission's](#) [Option](#) [How satisfied with the cookbook are you? - Not Satisfied](#) is selected

+ AND

+ RULE



Subject:

HTML Plain Text

Format Insert Snippets

Format Trebuchet M: 12pt

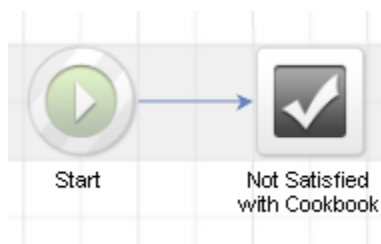
B **I** **U** ABC Paste as Text: Off

Hey ~Contact.FirstName~,

Thanks so much for your feedback and we're sorry your experience wasn't to your satisfaction.

Can you do me a favor: would you please hit reply and let us know what we could have done better?

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~



Type: Call

Title: t.FirstName ~ ~Contact.LastName ~ Merge

Body: ~Contact.FirstName~ ~Contact.LastName~ just took the customer survey and was not satisfied with the cookbook. Call them at ~Contact.Phone1~ and see what we can do the make things right.

Assign to Contact's owner

Assign to (backup): Paul Sokol

Days until due: 0

Due at: Please select one

Priority: 1. Critical

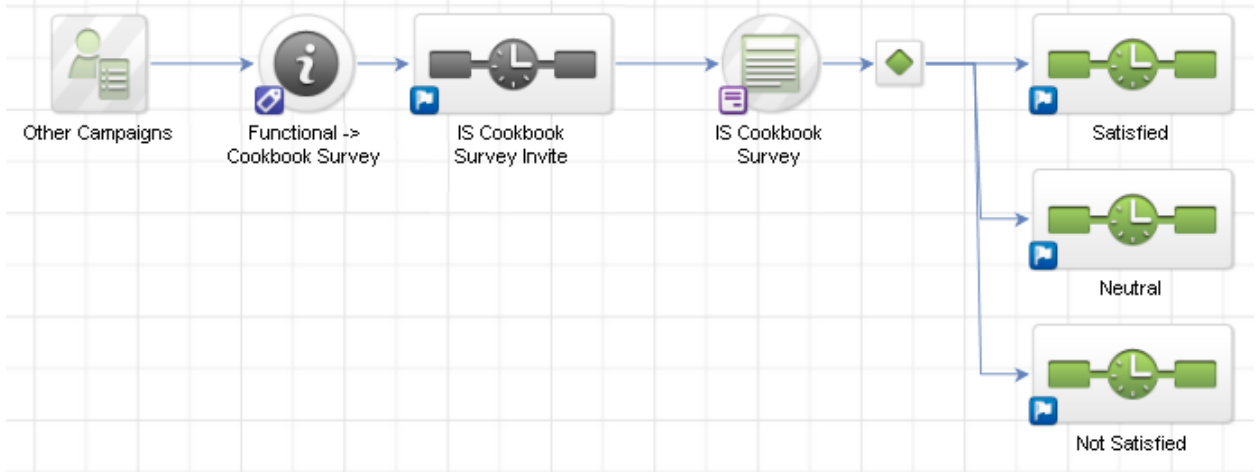
Link Options

Link to: Hosted web form +

is coo

IS Cookbook Survey

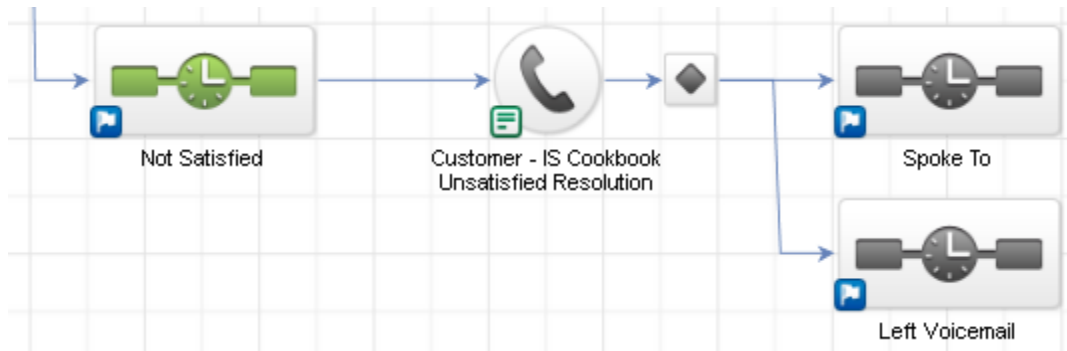
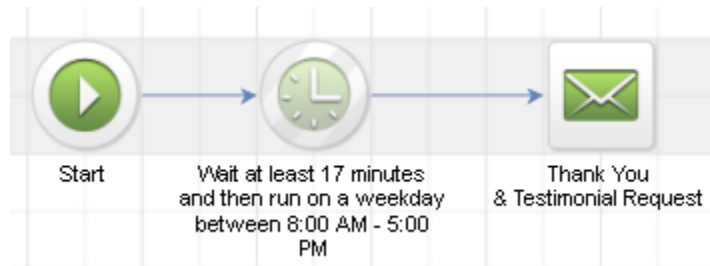
Insert/Update

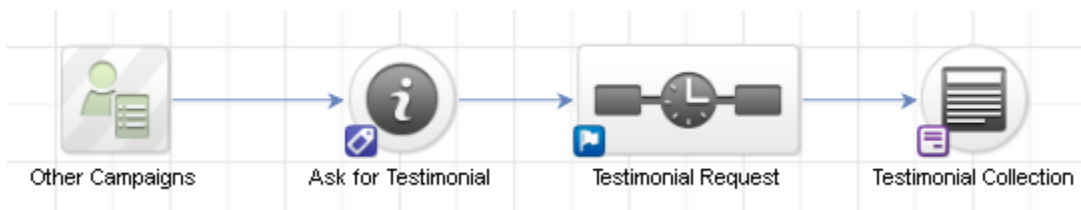
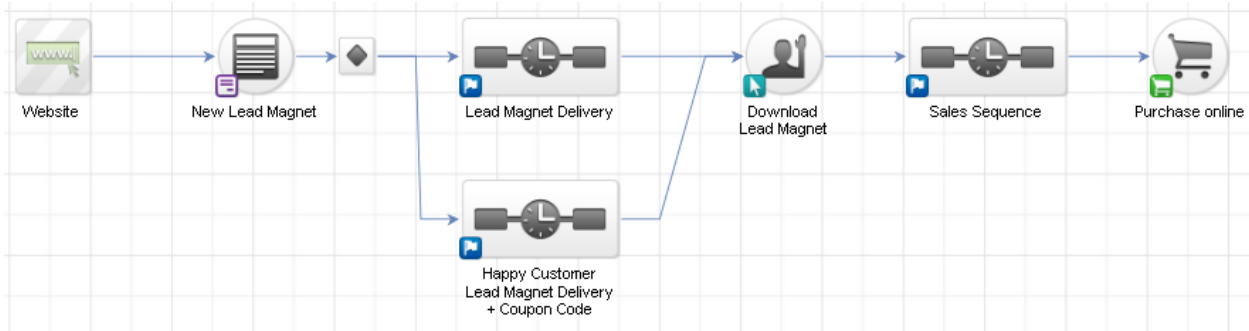




Thanks for your feedback, ~Contact.FirstName~!

[Click here to find out about personal 1-on-1 consulting!](#)





You can provide your testimonial below.

Thanks!

Hidden Field (Email)

Other Field Settings [X]

Which Field Please select one

Label Latest Subject Line

Required 4 Day Cash Machine Cart URL

Appointment Time

Appointment Date

Referring Name

Outstanding Hours

Outstanding Balance

Service Schedule Time

Service Schedule Date

Request Comments

Consultation Time

Consultation Date

Previous Experience

Qualifications

Greatest Strength

Greatest Weakness

Goals

sj_pass

Append to Person Notes

Create a Custom Field...

Save Cancel

Other Field Settings [X]

Which Field Append to Person Notes

Label Write your testimonial

Required On

Save Cancel



You can provide your testimonial below.

Thanks!

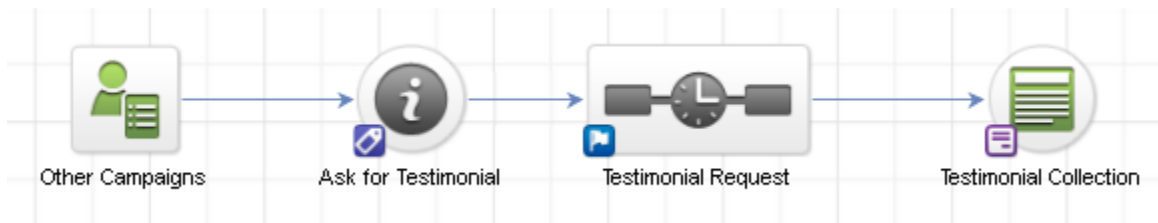
Hidden Field (Email)

Write your testimonial *

Here's My Testimonial!



Thanks for your testimonial, ~Contact.FirstName~!



Configure Tag ×

This goal is achieved when any of these tags are applied:

Functional -> Ask for Testimonial ×

Cancel Save



Subject: Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet M 12pt Link Paste as Text: Off

B *I* U ABC

First off, thanks for being one of our valued customers!

One of the best ways for us to continually provide better and better service is through customer feedback.

Which is why I wanted to quickly ask you: would you be open to sharing a testimonial about your experience?

Not only do testimonials help us understand what works, and what doesn't work, its also a great way for others to get a feel for what its like to be one of our customers.

[Click Here to Share Your Quick Testimonial](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

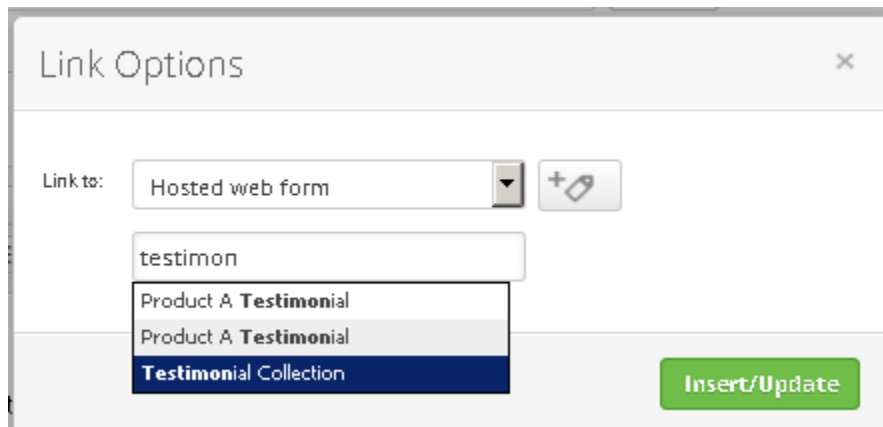
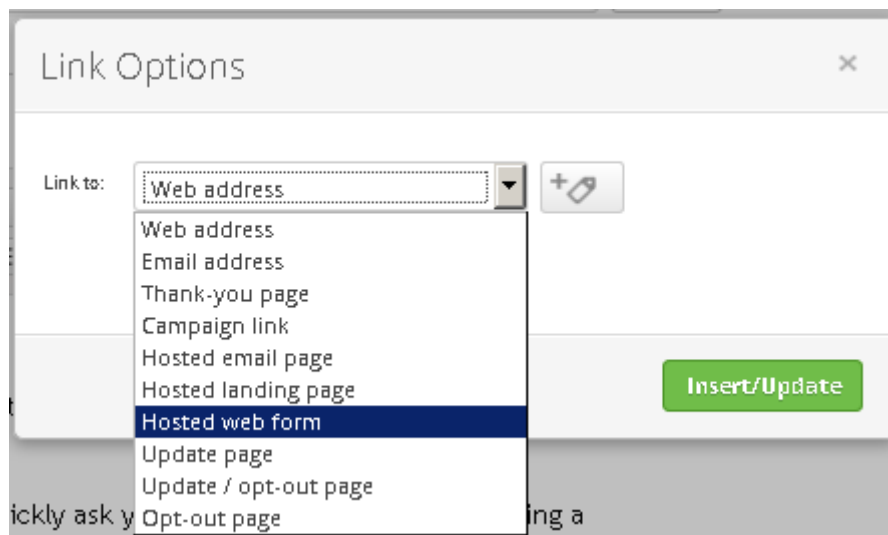
First off, thanks for being one of our valued customers!

One of the best ways for us to continually provide better and better service is through customer feedback.

Which is why I wanted to quickly ask you: would you be open to sharing a testimonial about your experience?

Not only do testimonials help us understand what works, and what doesn't work, its also a great way for others to get a feel for what its like to be one of our customers.

[Click Here to Share Your Quick Testimonial](#)



Configure Delay Timer



Summary

Wait at least 7 days and then run on a weekday at 8:00 AM (GMT -07:00) Phoenix

Wait at least

7 Day(s)

Run on

Weekday

At Between

8 00 AM

Cancel

Save

Subject: [REMINDER] I'd love to hear about your experience

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet M:

12pt



Link

Paste as Text: Off

Unlink



Hey ~Contact.FirstName~,

Thanks again for being one of our valued customers!

About a week ago I shared that one of the best ways for us to continually provide better and better service is through customer feedback.

Which is why I wanted to ask you one more time: would you be open to sharing a testimonial about your experience?

Remember, testimonials help us understand what works, and what doesn't work, AND its also a great way for others to get a feel for what its like to be one of our customers.

[Click Here to Share Your Quick Testimonial](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

Format Insert Snippets

Format Trebuchet M 12pt

B *I* U ABC A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [] ^ _ ` { } | ~

Link Paste Unlink

Hey ~Contact.FirstName~,

Thanks again for being one of our valued customers!

About a week ago I shared that one of the best ways for us to continually provide better and better service is through customer feedback.

Which is why I wanted to ask you one more time: would you be open to sharing a testimonial about your experience?

Remember, testimonials help us understand what works, and what doesn't work, AND its also a great way for others to get a feel for what its like to be one of our customers.

[Click Here to Share Your Quick Testimonial](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

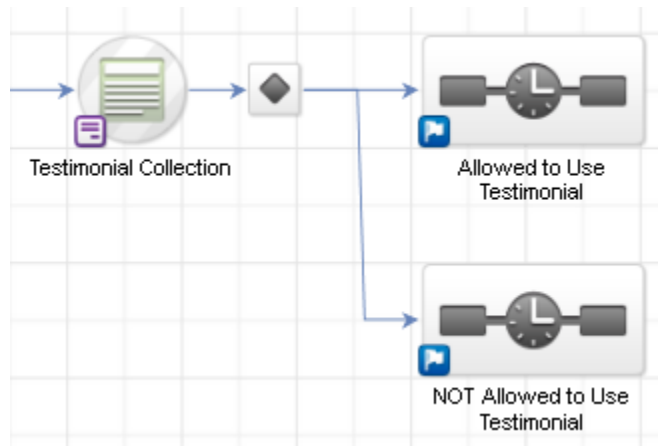
Write your testimonial *

Here's My Testimonial!

Write your testimonial *

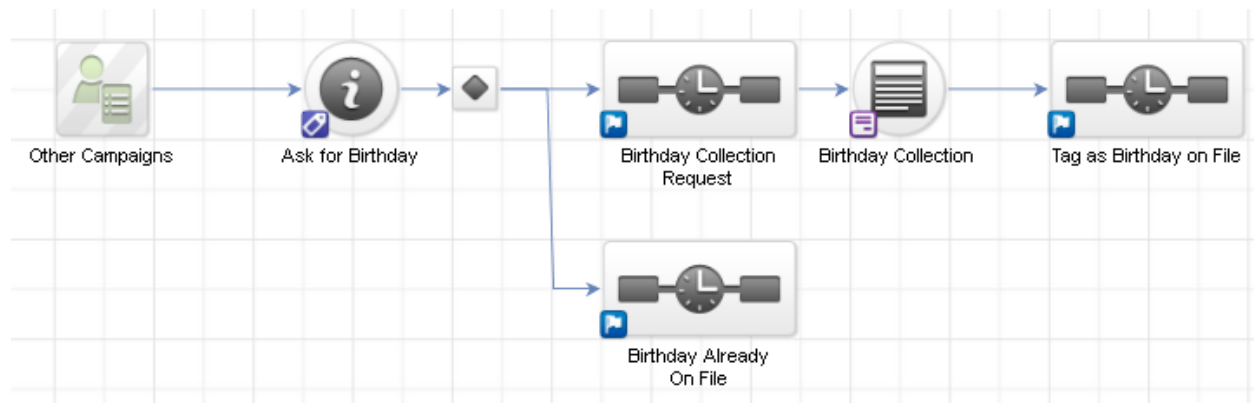
Please do NOT use my testimonial in advertisements

Here's My Testimonial!




Thanks for your testimonial, ~Contact.FirstName~!

[Click here to find out about personal 1-on-1 consulting](#)



Goal Settings ✕

This goal is achieved when a Contact...

 Submits a Web Form ▼

This goal can be achieved by...

Any Contact ▼

Cancel Save



**Share Your Birthday Below
& You Might Get A Surprise
In The Future!**

Hidden Field (Email)

Other Field Settings ✕

Which Field ▼

Label

Required On ↔

Save Cancel



**Share Your Birthday Below
& You Might Get A Surprise
In The Future!**

Hidden Field (Email)

Birthday *

Please format as MM-DD-YYYY

Here's My Birthday!



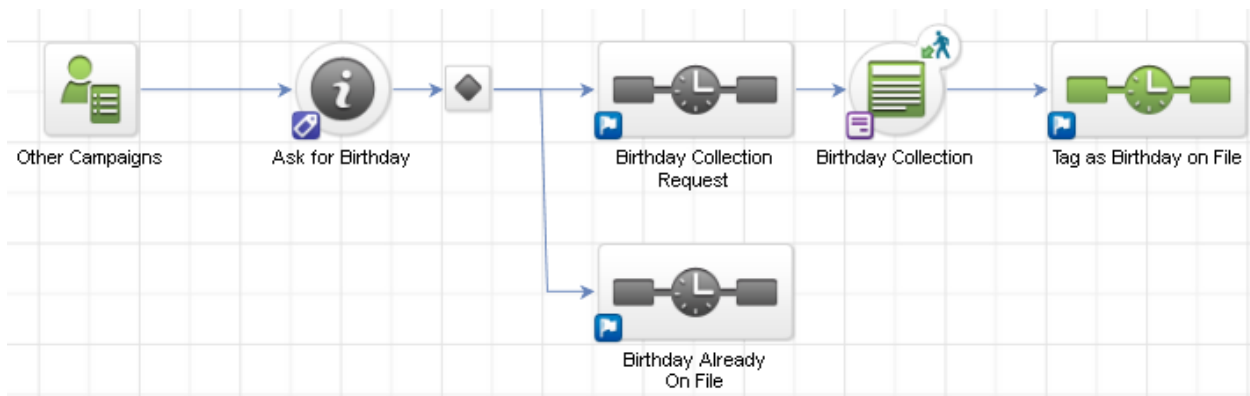
**Ok ~Contact.FirstName~! Forget you did this and enjoy
any surprises that might come your way :)**

Configure Tag ×

Apply Remove

Segmentation -> Birthday On File ×

Cancel Save



Configure Tag ✕

This goal is achieved when any of these tags are applied:

Functional -> Ask for Birthday ✕

Cancel
Save

Rules for: Birthday Collection Request

By default this Sequence will always run.

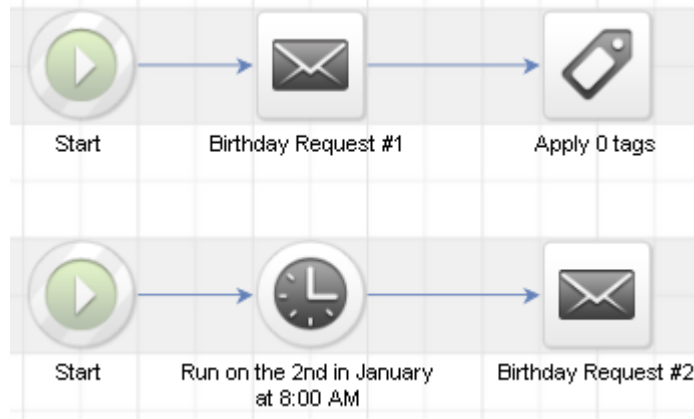
You may add a rule to specify criteria that a Contact must meet to be allowed into this Sequence.

+ RULE

Rules for: Birthday Collection Request

If the Contact's Tags doesn't contain Segmentation -> Birthday On File x

+ AND



Subject: Happy Birthday ~Contact.FirstName~?

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet M

12pt



Link

Paste as Text: Off

B *I* U ABC



Unlink

Hey ~Contact.FirstName~,

Did you know that I have NO IDEA when your birthday is?

The celebration of being born is quite special and I'd love to send you a surprise (or surprises) around your birthday.

Click Here and Share Your Birthday

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

Subject: Merge

HTML Plain Text

Format Insert Snippets

Format Trebuchet M 12pt Link Paste as Text: Off
Unlink

Hey ~Contact.FirstName~,

Did you know that I have NO IDEA when your birthday is?

The celebration of being born is quite special and I'd love to send you a surprise (or surprises) around your birthday.

[Click Here and Share Your Birthday](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

Link Options

Link to: +

- Web address
- Email address
- Thank-you page
- Campaign link
- Hosted email page
- Hosted landing page
- Hosted web form**
- Update page
- Update / opt-out page
- Opt-out page

IDEA whe

Insert/Update

Link Options

Link to:

- Birthday Collection**
- Birthday Submission

Configure Tag

Apply Remove

Configure Delay Timer



Summary

Run on the 2nd in January at 8:00 AM (GMT -07:00) Phoenix

Wait at least

0 No Delay

Run on

Day Of Month

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Last			

Specific Month(s)

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

At Between

8 00 AM

Cancel

Save

Subject: [REMINDER] Your Birthday This Year!

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet M

12pt



Link

Paste as Text: Off



Unlink

Hey ~Contact.FirstName~,

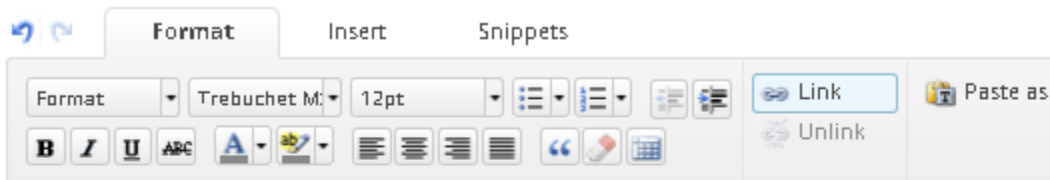
Hope your ~Date.Year~ is off to a great start!

We're doing some tidying up around here and noticed we never got your birthday on file.

Now is the perfect time to let us know and then when it happens, you might get a surprise (or two).

[Click Here and Share Your Birthday](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~



Hey ~Contact.FirstName~,

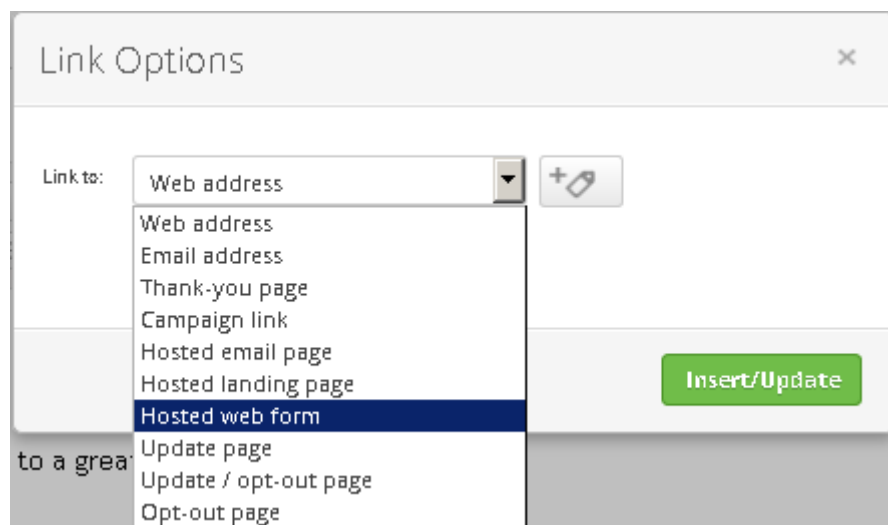
Hope your ~Date.Year~ is off to a great start!

We're doing some tidying up around here and noticed we never got your birthday on file.

Now is the perfect time to let us know and then when it happens, you might get a surprise (or two).

[Click Here and Share Your Birthday](#)

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

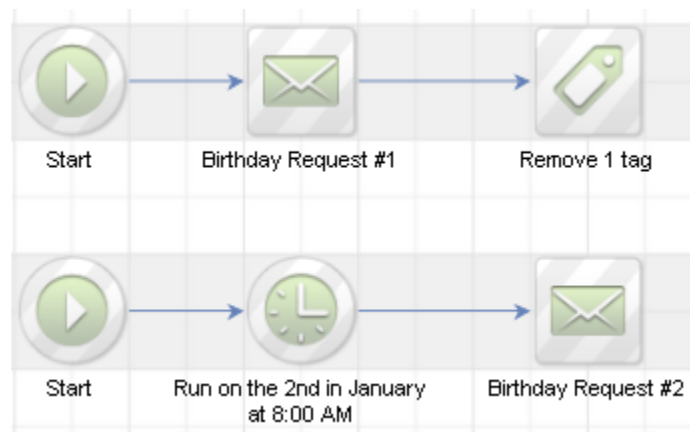


Link Options ×

Link to: +

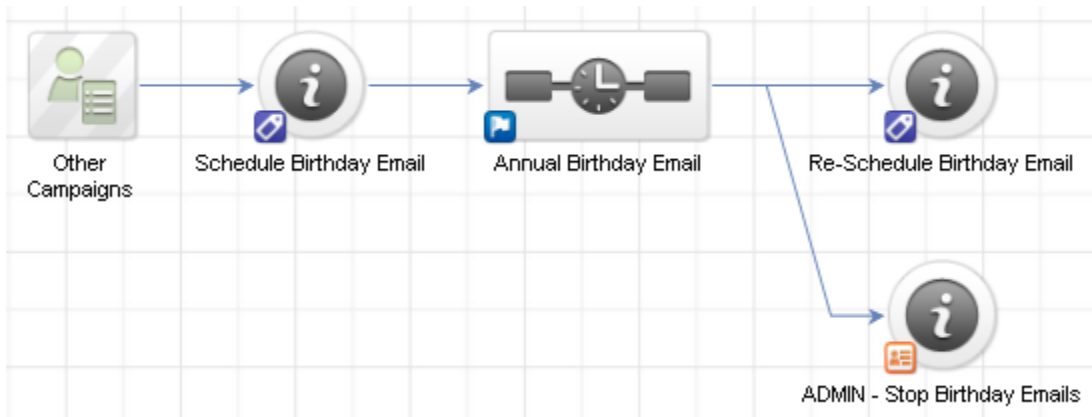
- Birthday Collection
- Birthday Submission

Insert/Update



Ok ~Contact.FirstName~! Forget you did this and enjoy any surprises that might come your way :)

[Click here to find out about personal 1-on-1 consulting](#)



Configure Tag

This goal is achieved when any of these tags are applied:

Functional -> Birthday Email Scheduled x

Cancel Save

Goal Settings

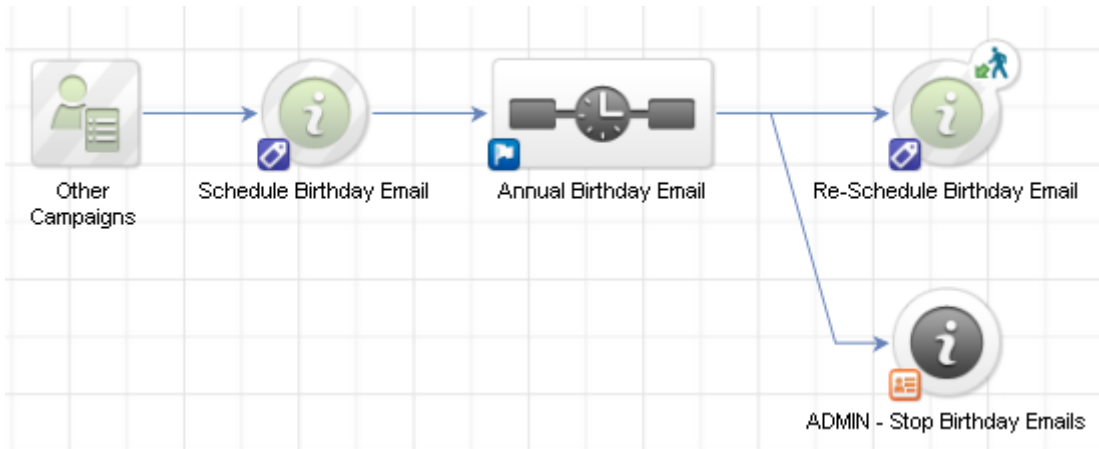
This goal is achieved when a User...

Applies a Tag

This goal can be achieved by...

Any Contact

Cancel Save

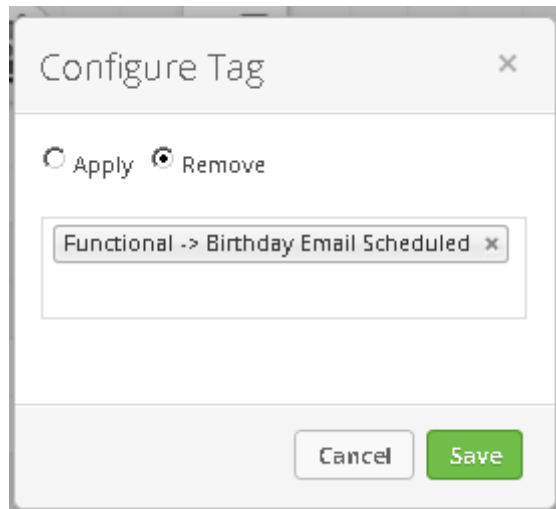


Configure Field Timer

Summary
Wait until the contact's next Birthday and then run at 8:00 AM (GMT -07:00) Phoenix

Wait Until	Contact Field	At
0 <input type="text"/> No Delay <input type="text"/>	Birthday <input type="text"/>	8 <input type="text"/> 00 <input type="text"/> AM <input type="text"/>
Before <input type="text"/>	Next occurrence <input type="text"/>	

Cancel Save



Subject:

HTML Plain Text

Format Insert Snippets

Format: 12pt

B **I** **U** **ABC**

Yay!

Another year behind you.

Happy birthday my friend :)

How is your ~Date.Year~?

Enjoy your day,
~Owner.FirstName~

Configure Field Timer

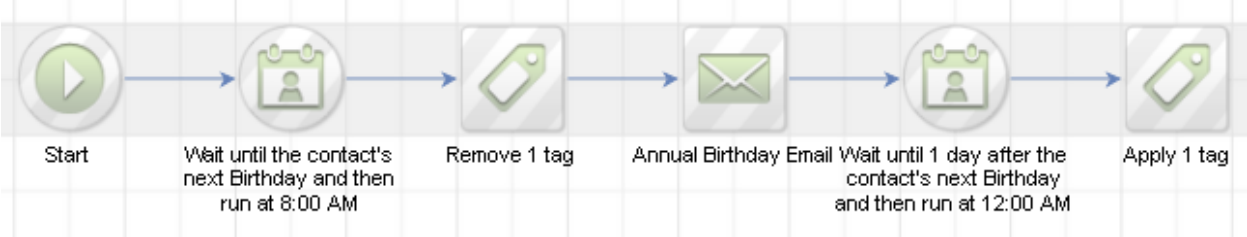
Summary
Wait until 1 day after the contact's next Birthday and then run at 12:00 AM (GMT-07:00) Phoenix

Wait Until	Contact Field	At
1 <input type="text"/> Day(s)	Birthday	12 <input type="text"/> 00 <input type="text"/> AM
After <input type="text"/>	Next occurrence	

Configure Tag

Apply Remove

Functional -> Birthday Email Scheduled



Configure Note Template

Action Type: UPDATE

Description: Stopped Birthday Emails

Creation Notes: We manually stopped their birthday emails.

User: The logged-in User

Notify: Please select a User

Buttons: Cancel, Save

Back to Campaign | Sequence | Saved at 6:02:27 pm | Tag as Birthday on File

Edit | Performance

Configure Tag

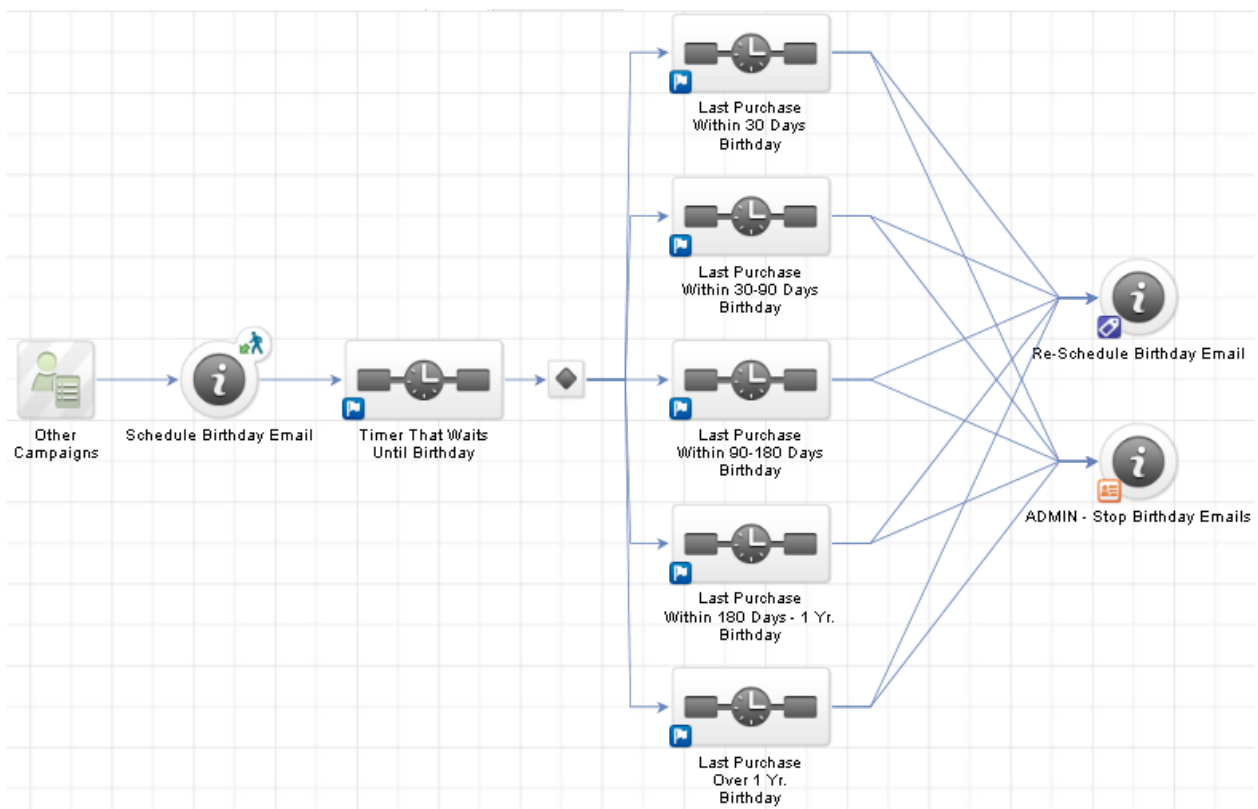
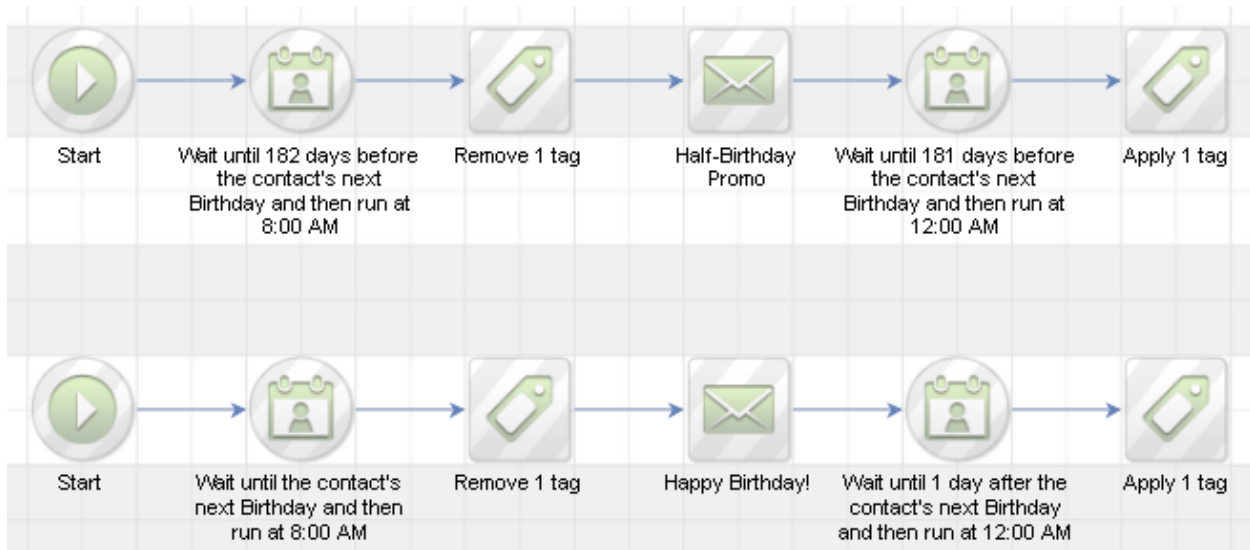
Apply Remove

Segmentation -> Birthday On File x

Functional -> Birthday Email Scheduled x

Buttons: Cancel, Save

Start -> Apply 1 tag



Chapter 7: Wowing Existing Customers with Great Experiences

My Nav	CRM	Marketing	E-Commerce	Admin
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Product

Order Settings
Product
Orders
Billing Automation

Triggers (by type) Choose Trigger Type Add Trigger

Choose Trigger Type

- When a credit card autocharge attempt is made
- When an autocharge fails
- When a credit card is going to expire**

Manage Trigger

Set Trigger Criteria

When the credit card type is: Any Type

and the card expires in 30 days.

Include cards that are NOT set to be billed in the future: Yes No

Actions

No actions yet. Select an action from the 'Add New Action' drop-down below.

Add New Action

- Add New Action
- Apply/remove tag
- Start/stop a campaign (legacy)
- Start/stop a follow-up sequence
- Send an email, fax, etc.

Send an Email, Fax, etc.

What do you want to send?

Please select an activity

- Please select an activity
- Email
- Fax
- Voice Broadcast
- Letter
- Fulfillment List
- Queued Fulfillment List
- Appointment

Send an Email, Fax, etc.

What do you want to send?

Email

Show templates in ALL categ...

{Categories}


Please select a template


{Templates}

Edit


Add

Template Options

Title: 

Public/Private: 

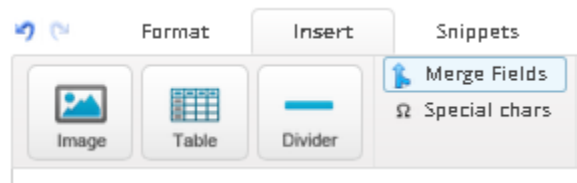
Compose Email



From: **Name (Optional):** **Email Address:**

To: [The contact's primary email address](#) [\(Change\)](#) [Add CC](#) | [Add BCC](#)

Subject:



Hello ~Contact.FirstName~,

Sorry for the harsh subject line, but your ~CreditCard.CardType~ ending in ~CreditCard.Last4~ is going to expire soon.

To prevent any headaches, if you could please take a minute right now to update the card on file, that would really help me out :)

~CreditCard.PlainTextUpdateLink~

Have a great ~Date.DayOfWeek~,
Paul

Email Readiness

Ready to Send? **Yes** 

Save

Delete


Clone

Actions


Send an Email, Fax, etc.

What do you want to send?

Email 

Show templates in ALL categories 

(Categories)

Billing - 30 Day CC Expiring (Any) 

(Templates)

Edit

Add

Only run this action when certain rules are met

Save

Cancel

Actions

Send an *Email* using the "Billing - 30 Day CC Expiring (Any) (Email)" template

Add New Action 

Save Trigger

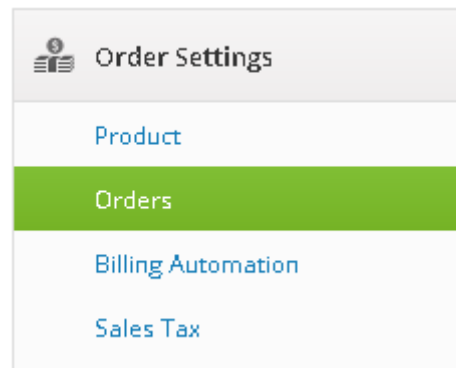
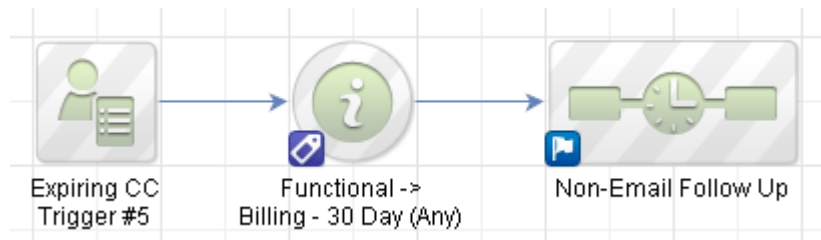
Delete Trigger

Actions

Send an *Email* using the "Billing - 30 Day CC Expiring (Any) (Email)" template

Apply 1 tag

- Billing - 30 Day Expiration (Any)



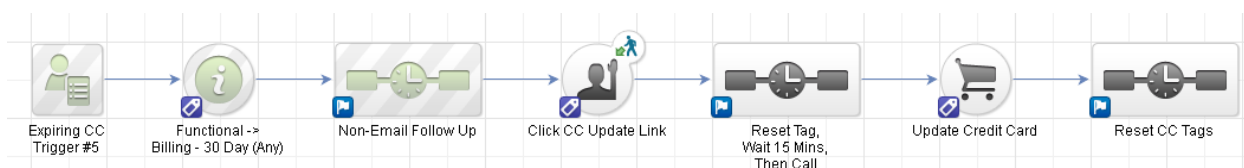
Clicked Update Credit Card link:

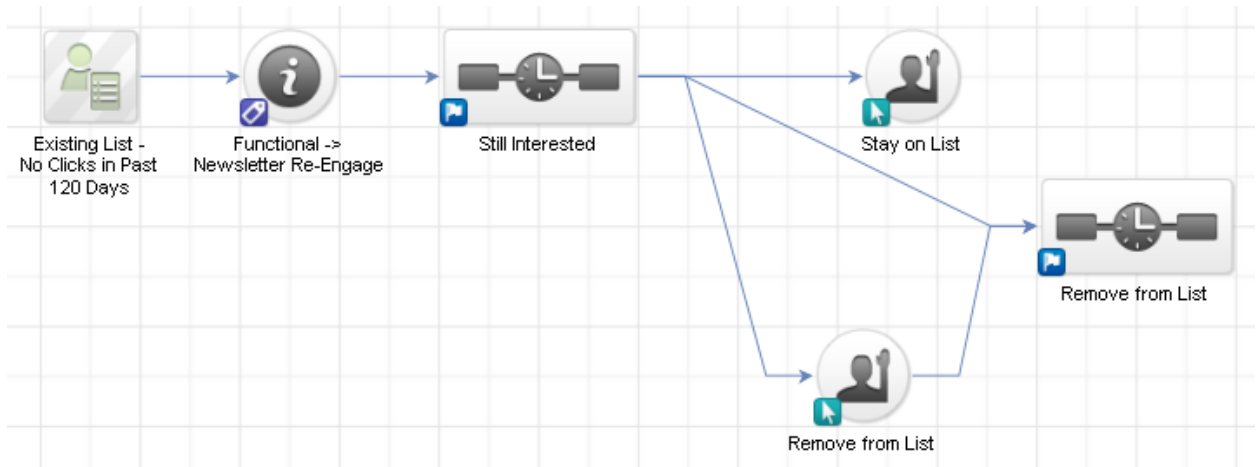
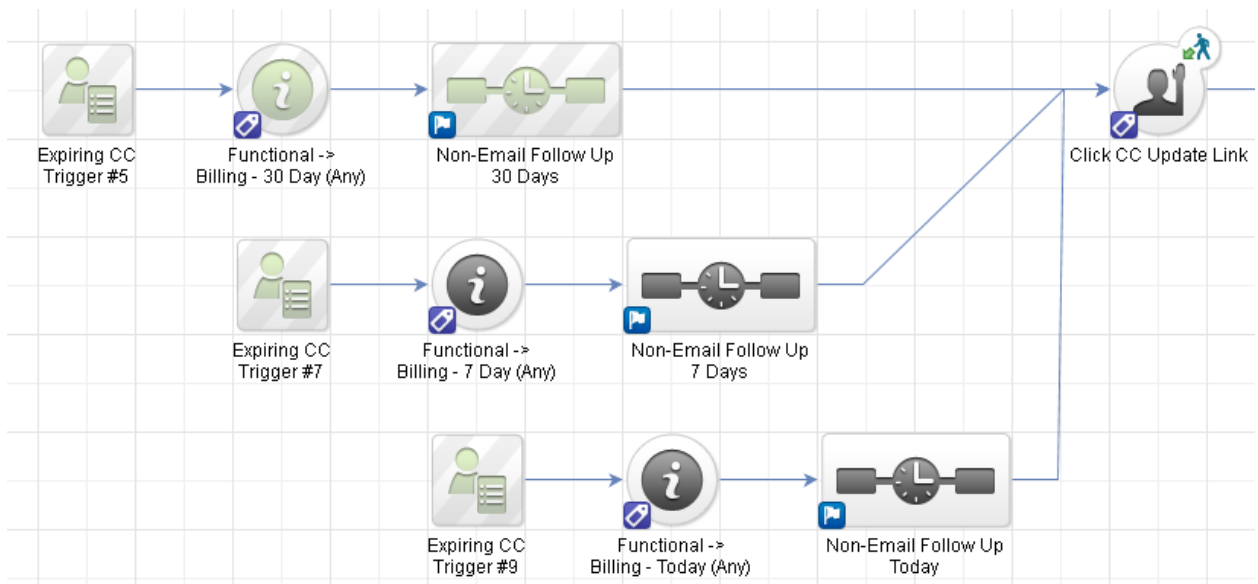
Actions

Updated Credit Card via link:

Actions

Notifications



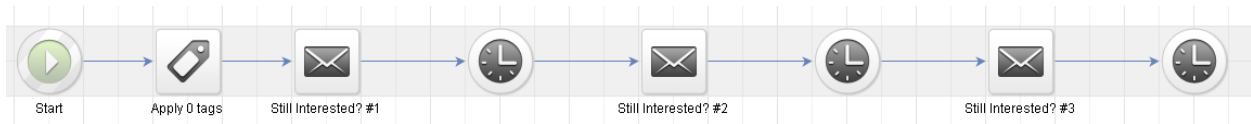


Configure Tag

This goal is achieved when any of these tags are applied:

Functional -> Newsletter Re-Engage x

Cancel Save



Configure Tag

Apply Remove

Functional -> Newsletter Re-Engage x

Cancel Save

Subject:

HTML Plain Text

Format Insert Snippets

Format Trebuchet M 12pt

Hey ~Contact.FirstName~,

I'm doing some digital house tidying and noticed that while you ARE on the newsletter list, you haven't been clicking around much.

First off, thank you so much for even choosing to receive the newsletter at some point!

And I get it, things change. Interests evolve. I really do like to keep a clean email list, so can you please let me know how you want to proceed by clicking one of the links below?

Yes, I want to continue receiving your newsletter!

No, please remove me from this list!

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

Format Insert Snippets

Format Trebuchet M 12pt

First off, thank you so much for even choosing to receive the news some point!

And I get it, things change. Interests evolve. I really do like to keep email list, so can you please let me know how you want to proceed one of the links below?

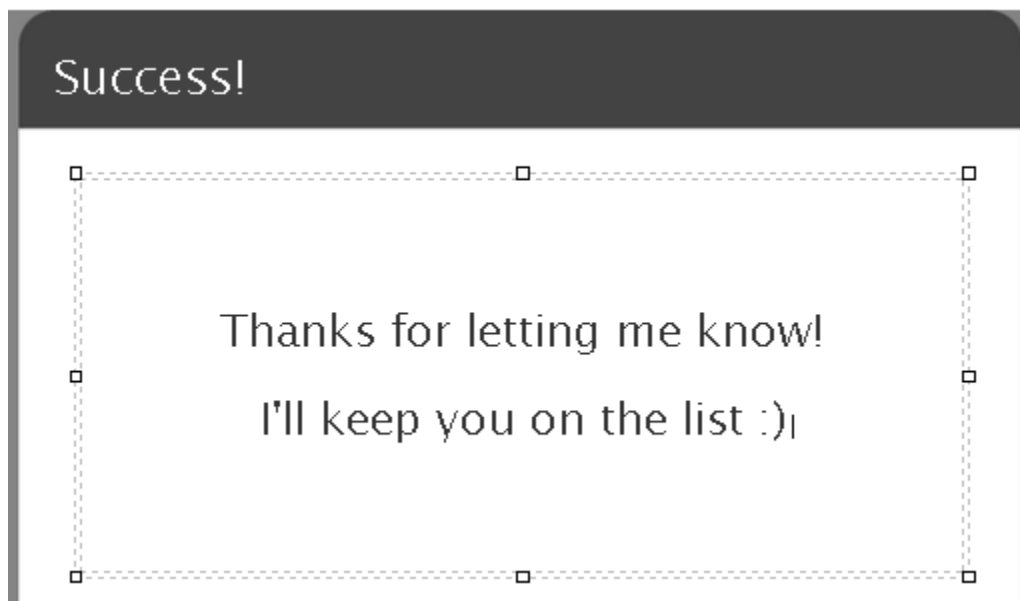
Yes, I want to continue receiving your newsletter!

Link Options ×

Link to: +

- Web address
- Email address
- Thank-you page**
- Campaign link
- Hosted email page
- Hosted landing page
- Hosted web form
- Update page
- Update / opt-out page
- Opt-out page

Insert/Update



Manage Link Thank-You Page - Mozilla Firefox

https://voyicks.infusionsoft.com/app/emailAuthoring/openThankYouPage?linkId=13483L

Success!

Thanks for letting me know.
I'll take you off the list.

Save Save & Close

From: The cont
To: Email
Subject: hey
HTML Plain T
Format Tr
B I U ABC
I'm doing so
newsletter l
First off, th
some point!
And I get it,
email list, s
clicking one
Yes, I want
No, please remove me from this list!

Configure Delay Timer

Summary
Wait at least 1 week and then run on a weekday at 8:00 AM (GMT -07:00) Phoenix

Wait at least	Run on	<input checked="" type="radio"/> At <input type="radio"/> Between
1 Week(s)	Weekday	8 00 AM

Cancel Save

Subject: [FINAL NOTICE] You're Out ~Contact.FirstName~!

Merge

HTML

Plain Text



Format

Insert

Snippets

Format Trebuchet M: 12pt

B *I* U ABC Paste as Text: Off

Thank you so much for even choosing to receive the newsletter at some point!

However while you ARE on the newsletter list, you haven't been clicking around much.

In fact, this is my third and final notice as I don't know what else I can doing.

Can you PLEASE let me know how you want to proceed by clicking one of the links below?

[Yes, I want to continue receiving your newsletter!](#)

[No, please remove me from this list!](#)

I know you are super busy, so if you don't click anything in the next couple days, I'm just going to automatically remove you.

Configure Delay Timer

Summary
Wait at least 3 days and then run on a weekday at 8:00 AM (GMT -07:00) Phoenix

Wait at least 3 Day(s)	Run on Weekday	<input checked="" type="radio"/> At <input type="radio"/> Between 8 00 AM
----------------------------------	--------------------------	--

Cancel Save

[Back to Campaign](#) **Stay on List**

Still Interested	<p>Thank you so much for even choosing to receive the newsletter at some point!</p> <p>However while you ARE on the newsletter list, you haven't been clicking around much.</p> <p>In fact, this is my third and final notice as I don't know what else I can do.</p> <p>Can you PLEASE let me know how you want to proceed by clicking one of the links below?</p> <p><input checked="" type="checkbox"/> Yes, I want to continue receiving your newsletter!</p> <p><input type="checkbox"/> No, please remove me from this list!</p> <p>I know you are super busy, so if you don't click anything in the next couple days, I'm just going to automatically remove you.</p>
Still Interested? #1 <i>1 of 3 links are selected</i>	
Still Interested? #2 <i>1 of 3 links are selected</i>	
Still Interested? #3 <i>1 of 3 links are selected</i>	

[Back to Campaign](#)

Remove from List

Still Interested

Still Interested? #1
0 of 3 links are selected

Still Interested? #2
1 of 3 links are selected

Still Interested? #3
1 of 3 links are selected

Thank you so much for even choosing to receive the newsletter at some point!

However while you ARE on the newsletter list, you haven't been clicking around much.

In fact, this is my third and final notice as I don't know what else I can do.

Can you PLEASE let me know how you want to proceed by clicking one of the links below?

[Yes, I want to continue receiving your newsletter!](#)

[No, please remove me from this list!](#)

I know you are super busy, so if you don't click anything in the next couple days, I'm just going to automatically remove you.

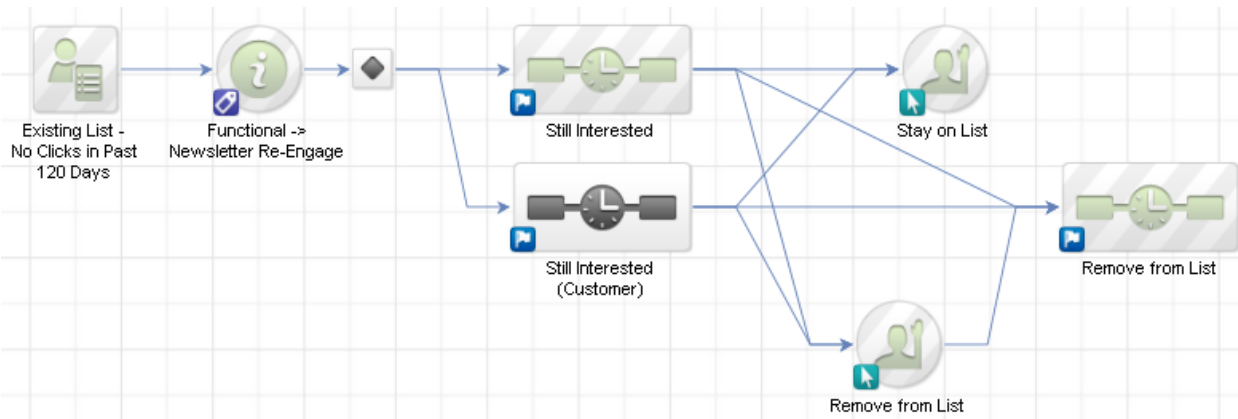


Configure Tag ×

Apply Remove

eSubscriptions -> PS.ME ×

Cancel Save



<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Template Settings
Template Defaults
Email Defaults
Email Status Automation
Fulfillment
Voice & Fax

Email

Capture bounces on individual emails? Yes No [?](#)

Email History Ignore Domains:

 [?](#)

Default Opt-In Link: Default Double Opt-in Link

Default Opt-Out Link: Default Opt-Out

When Someone Opt's Out of All Email Marketing: **Actions**

Manage Action Set

Action Set Info

Name: When Someone Opt's Out of All Email Marketing:
Linked To: EMAIL:optout.all

Actions

No actions yet. Select an action from the "Add New Action" drop-down below.

Add New Action

- Add New Action
- Apply/remove tag
- Start/stop a campaign (legacy)
- Start/stop a follow-up sequence
- Send an email, fax, etc.
- Assign a contact to a user
- Create an appointment
- Create a task**

Create a Task

Show templates in ALL categories Please select a template

(Categories) (Templates)

Manage Task Template [\(back to search results\)](#)

General

[Categories & Follow-Up Sequence](#)

[Misc Expenses](#)

Template Options

Title:

Public/Private:

Task Information

Merge Fields

Merge

Type:

Title:

Body:

Assign to contact's owner? Yes No

Assign To: (backup)

Days Till Due:

Due At:

Priority:

Task Readiness

Ready?

Yes

Save

Create a Task

Show templates in ALL categories

Vaynerchuk Opt Out Call

Edit

Add

(Categories)

(Templates)

Only run this action when certain rules are met

Please select a rule

Edit

Add

New Rule Set

Choose Name

Phone Number Check

Create

Rule Set Parameters

Name: Phone Number Check

Rule is true when

All

Please select one

All

Any

None

of the criteria are true.

Criteria List

Create Criteria

Criteria List

Clear

Select Contact Field: Contact - phone & fax Phone 1 Number

Criteria: Is Empty

Save Criteria

Cancel

Rule Set Parameters

Name: Phone Number Check

Rule is true when None of the criteria are true.

Criteria List

Create Criteria

Edit	Criteria	Description	Remove
[Edit]	Based on data from the contact record	When the Contact's Phone 1 Is Empty	[Remove]

Save

Save & Close

Delete

Create a Task

Show templates in ALL categories Vaynerchuk Opt Out Call Edit Add
(Categories) (Templates)

Only run this action when certain rules are met

Phone Number Check Edit Add

Save

Cancel

Actions

Run the following actions when NONE of the criteria for the "Phone Number Check" rule are met

Send a *Task* using the "Vaynerchuk Opt Out Call (Task)" template Edit x

Add New Action ▼

Save Delete

My Nav	CRM	Marketing	E-Commerce	Admin
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Referral Partners ▼ ▼

- View Referral Partners
- Add a Referral Partner
- Referral Tracking Links
- Promotional Resources
- Commission Programs**

Commission programs

[Add a Commission Program](#)

Manage Referral Partner Program

Information

Name:

Notes:

Priority:

[Save](#)

Default Commissions

Default commissions will be paid for products and subscriptions plans that do not have an override specified below.

Product	Price	Level 1	Level 2	Pay If Unused	Pay Type	Cycles
Default	N/A	Not Set	Not Set	Not Set	Not Set	N/A [Edit]

Product Commissions

Product	Price	Level 1	Level 2	Pay If U	Pay Type	Cycles
<input type="text" value="cook"/>						Create Override
Infusionsoft Cookbook						
Infusionsoft Cookbook Tutorials						

Default Commissions

Default commissions will be paid for products and subscriptions plans that do not have an override specified below.

Product	Price	Level 1	Level 2	Pay If Unused	Pay Type	Cycles
Default	N/A	Not Set	Not Set	Not Set	Not Set	N/A [Edit]

Product Commissions

 [Create Override](#)

Manage Affiliate Commission Override ✕

Commission Information

Referral Partner Program	IS Cookbook
Description	Infusionsoft Cookbook
Payout Type	<input type="text" value="Up- Front Credit In Full"/>
	<ul style="list-style-type: none">Up- Front Credit In FullCredit On Customer Payment

Manage Affiliate Commission Override



Commission Information

Referral Partner Program

IS Cookbook

Description

Infusionsoft Cookbook

Payout Type

Credit On Customer Payment



Commissions

Level	Level 1	Level 2	Pay If Unused
Lead \$	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Lead %	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Sale \$	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Sale %	<input type="text" value="50"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>

Save

Manage Referral Partner Program

Information

Name

Notes

These are referral partners that are promoting the Infusionsoft Cookbook

Priority

[Save](#) [Delete](#)

Default Commissions

Default commissions will be paid for products and subscriptions plans that do not have an override specified below.

Product	Price	Level 1	Level 2	Pay If Unused	Pay Type	Cycles
Default	N/A	Not Set	Not Set	Not Set	Not Set	N/A [Edit]

Product Commissions

✖ [Create Override](#)

Product	Price	Level 1	Level 2	Pay If Unused	Pay Type	Cycles
Infusionsoft Cookbook	\$4.97	Sale 50.0%	Not Set	Not Set	OnPayment	N/A [Edit]

Referral Partners Vi

- View Referral Partners
- Add a Referral Partner
- Referral Tracking Links
- Promotional Resources
- Commission Programs

[Contacts](#) [Companies](#) [Opportunities](#) [Referral Partners](#) [Visitors](#) [Reports](#) [Settings](#)

Referral tracking links

[Add a Referral Tracking Link](#)

Main Search [Search](#)

Manage Tracking Links

Sales Website Information

Name	<input type="text" value="Main IS Cookbook Landing Page"/>
Code (no spaces, keep it short)	<input type="text" value="iscbk"/>
Website Address	<input type="text" value="www.paulsokol.me"/>
Referral Partner	<input type="text" value=""/>
Programs	<div style="border: 1px solid #ccc; padding: 5px;"><p>Please select a programs</p><ul style="list-style-type: none"><li style="background-color: #0056b3; color: white; padding: 2px;">IS Cookbook<li style="padding: 2px;">R25 Test<li style="padding: 2px;">Test Program</div>

Default Commissions

Default commissions will be paid for products and subscriptions plans that do not have an override specified below.

Product	Price	Level 1	Level 2	Pay If Unused	Pay Type	Cycles
Default	N/A	Not Set	Not Set	Not Set	Not Set	N/A [Edit]

Manage Affiliate Commission Override

Commission Information

Referral Partner Program: **IS Cookbook Superstars**

Description: **Infusionsoft Cookbook**

Payout Type:

- Credit On Customer Payment
- Up- Front Credit In Full**
- Credit On Customer Payment

Commission programs

Add a

Name

Actions ▾

1-4 of 4 per page

<input checked="" type="checkbox"/>	Id	Name	Priority
<input checked="" type="checkbox"/>	7	IS Cookbook	3
<input checked="" type="checkbox"/>	5	IS Cookbook Superstars	1

Referral Partner Defaults

Contact & Company Settings

- General
- Task/Appt/Note Settings
- Tags
- Tag Categories
- Scores
- Round Robins

Referral Partner

Referral Partner Code Prefix:

Skip notifications on orders and web forms? Yes No

Tracking

How to choose Referral Partner:

Referral Partner tracking method:

- First referring
- Latest referring**

Tracking

How to choose Referral Partner: Latest referring

Referral Partner tracking method: Referral history and cookies 

Use IP address? **Referral history and cookies**
Only cookies

Tasks Scored & Recent Activity **Referral Partner Tracking** Follow-up Sequences Campaigns Opportunities Orders

Current Referral Partner

Referral Partner	Type	Date
Paul Infusionsokol	Click	3/26/2015 1:11 PM

Referral Partner Referrals

Referral Partner	Type	Date
Paul Infusionsokol	Click	12/15/2014 1:37 PM
Paul Infusionsokol	Click	12/15/2014 1:36 PM
Paul Infusionsokol	Click	12/15/2014 1:35 PM

Referral Partner Settings

Referral Partner Defaults

[Referral Partner Center](#)

```
ad = "";  
} else {  
  ad = ad + "/";  
}  
  
window.location = myCrm + "/go/" + code + affiliate +  
ad;
```

Payout

Referral Partner # Levels: 2

Payout Type: Please select a referral partner # levels:
1
2
3

Payout Type: Amount

(Amount/Percent): Percent

Use 'Pay If Unused'? Yes No

Save

Referral Partners ▾

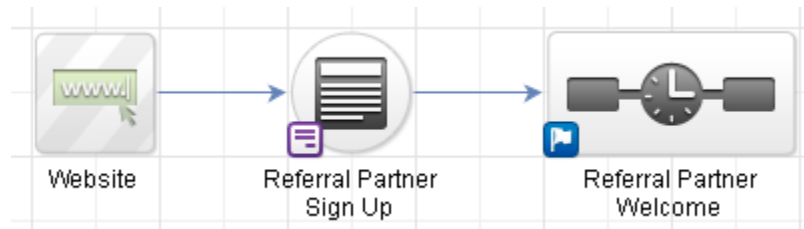
View Referral Partners

Add a Referral Partner

Referral Tracking Links

Promotional Resources

Commission Programs



Join Our Referral Partner Program!

As a referral partner, you'll enjoy 50% commissions on any Infusionsoft Cookbook sales from people you introduce to it.

Part 1: Contact Information

Part 1: Contact Information

First Name *

Last Name *

Phone Number *

Email *

Part 1: Contact Information

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Phone Number *	<input type="text"/>
Email *	<input type="text"/>

Part 2: Payout Information

Billing Street Address 1 *	<input type="text"/>
Billing City *	<input type="text"/>
Billing State *	<input type="text"/>
Billing Postal Code *	<input type="text"/>

Billing State *	<input type="text"/>
Billing Postal Code *	<input type="text"/>

Part 3: Tax Information

Other Field Settings ✕

Which Field

Label

Required On

Part 3: Tax Information

Social Security # / Tax ID # *	<input type="text"/>
--------------------------------	----------------------

Part 4: Create Your Referral Partner Account

Referral Partner Settings



Parent ?

Parent Referring Referral Partner

Backup Parent ✖

Programs ?

Add to

- IS Cookbook
- IS Cookbook Superstars
- R25 Test
- Test Program

Remove from

- IS Cookbook
- IS Cookbook Superstars
- R25 Test
- Test Program

Referral Partner Notifications ?

On New Lead No

On New Sale No

Credit Window ?

Referral Cookie Expires After Days

Save

Cancel

Part 3: Tax Information

Social Security # / Tax ID #
*

Part 4: Create Your Referral Partner Account

Username *

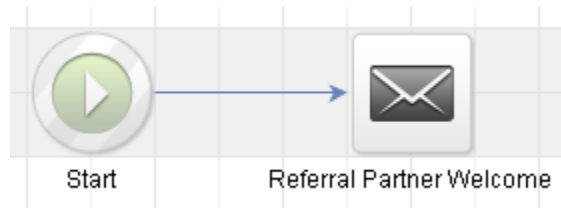
Password *

Confirm Password *



Thanks for signing up, ~Contact.FirstName~!

Check your inbox right now for your [login](#) details.



Subject: Welcome to Our Referral Partner Program

Merge

HTML

Plain Text



Format

Insert

Snippets

Format

Trebuchet MS

12pt



Link

Paste as Text: Off

B **I** **U** ABC



Unlink

Hello ~Contact.FirstName~,

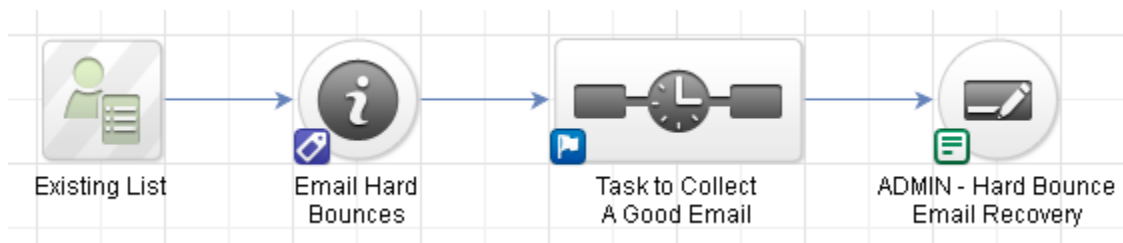
Welcome to our referral partner program!

At any point in time, you can log into the partner portal and generate your own trackable links so you can begin promoting.

Username: ~Affiliate.AffCode~
Password:~Affiliate.Password~

Login here: <https://voyicks.infusionsoft.com/app/authentication/login>

Chapter 8: Administrative - Conquer Internal Chaos



Configure Tag ✕

This goal is achieved when any of these tags are applied:

Email Engagement -> Hard Bounce ✕

Cancel Save



Type Call ▼

Title Hard Bounced Email - -Contact.FirstName Merge

Body Please call them at -Contact.Phone1 - to get a working email address. Use the internal form "ADMIN - Hard Bounce Email Recovery" to record the new email address. ▲
▼
⋮

Assign to Contact's owner

Assign to (backup) Paul Sokol ▼

Days until due 0 ▲
▼

Due at Please select one ▼

Priority 2. Essential ▼

×
Configure Tag

Apply Remove

Email Engagement -> Hard Bounce ×

Cancel
Save

Use this form to collect a good working email when someone's current email address has hard bounced.

Email *

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Initial Setup	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Dashboard	Opportunities	Lead Generation	Products	Users
My Day	Referral Partners	Templates	Actions	Import Data
	Visitors	Legacy	Promotions	Data Cleanup
Legacy			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

- Template Settings
- Template Defaults
- Email Defaults
- Email Status Automation
- Fulfillment
- Voice & Fax

Triggers (by type)

When an email bounces

- Choose Trigger Type
- When an email bounces

Manage Trigger

Set Trigger Criteria

When the bounce type is: and the email has bounced time(s).

Actions

No actions yet. Select an action from the "Add New Action" drop-down below.

- Add New Action
- Apply/remove tag

Actions

Apply/ Remove Tag

To Apply or Remove?
 Apply Remove

Apply these Tags

- Email Engagement -> Cold
- Email Engagement -> Hard Bounce**
- Email Engagement -> Hot
- Email Engagement -> Low
- Email Engagement -> Not Interested Anymore
- Email Engagement -> Timer Start
- Email Engagement -> Warm
- eSubscriptions -> Early PS.ME Blog
- eSubscriptions -> Fifi Watch
- eSubscriptions -> Manti Promos
- eSubscriptions -> Newsletter
- eSubscriptions -> PS.ME

[Create a new Tag...](#)

Only run this action when certain rules are met

⚙️ Manage Trigger

Set Trigger Criteria ⓘ

When the bounce type is: and the email has bounced time(s).

Actions

Apply 1 tag

- Hard Bounce

x

hard bounce

Please select one

- soft bounce - mailbox full
- soft bounce - message too large
- bounce - no email address
- transient bounce
- mail block - relay denied
- general bounce
- mail block - general
- mail block - known spammer
- mail block - spam detected
- soft bounce - dns failure
- undetermined
- subscribe request
- challenge-response
- unsubscribe request
- auto reply
- hard bounce**
- soft bounce - general
- mail block - attachment detected

To Apply or Remove?

Apply Remove

Apply these Tags

Email -> Start [X] Re-Engagement

Email Engagement -> Cold

Email Engagement -> Hard Bounce

Email Engagement -> Hot

Email Engagement -> Low

Email Engagement -> Not Interested Anymore

Email Engagement -> Timer Start

Email Engagement -> Warm

eSubscriptions -> Early PS.ME Blog

eSubscriptions -> Fifi Watch

eSubscriptions -> Manti Promos

[Create a new Tag...](#)

Only run this action when certain rules are met

Phone Present?

Rule Set Parameters

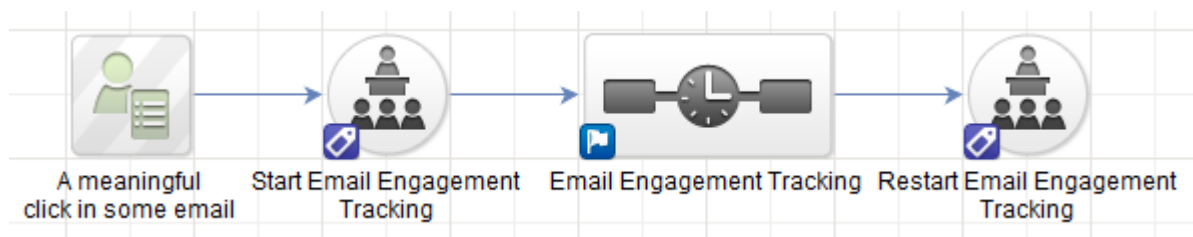
Name:

Rule is true when of the criteria are true.

Criteria List

[Create Criteria](#)

Edit	Criteria	Description	Remove
[Edit]	Based on data from the contact record	When the Contact's Phone 1 Is Empty	[Remove]
[Edit]	Based on data from the contact record	When the Contact's Phone 2 Is Empty	[Remove]
[Edit]	Based on data from the contact record	When the Contact's Phone 3 Is Empty	[Remove]
[Edit]	Based on data from the contact record	When the Contact's Phone 4 Is Empty	[Remove]
[Edit]	Based on data from the contact record	When the Contact's Phone 5 Is Empty	[Remove]



Configure Tag ×

This goal is achieved when any of these tags are applied:

Email Engagement -> Timer Start ×

Cancel Save

Goal Settings ×

This goal is achieved when a User...

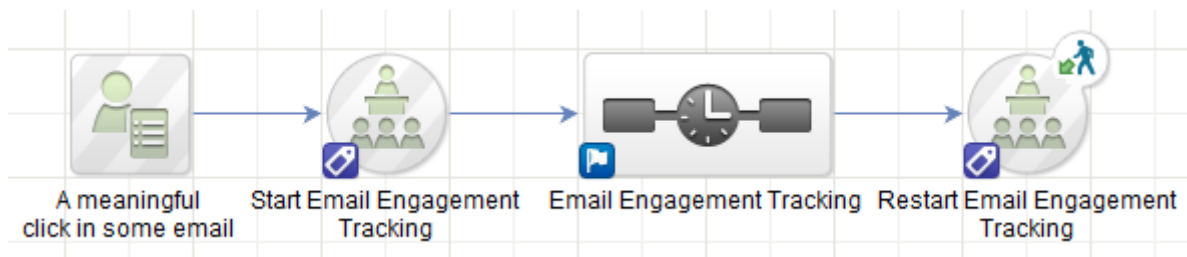
Applies a Tag ▼

This goal can be achieved by...

Contacts in this Campaign ▼

Contacts in this Campaign

Any Contact





Configure Tag ✕

Apply Remove

Email Engagement -> Hot ✕

Configure Tag ✕

Apply Remove

Email Engagement -> Cold ✕
Email Engagement -> Warm ✕
Email Engagement -> Timer Start ✕



Configure Delay Timer

Summary
Wait at least 30 days and then run at 12:00 AM (GMT -07:00) Phoenix

Wait at least 30 [up/down] Day(s) [down]	Run on Any Day [down]	<input checked="" type="radio"/> At <input type="radio"/> Between 12 [down] 00 [down] AM [down]
--	---------------------------------	--

Cancel Save

Configure Tag

Apply Remove

Email Engagement -> Hot x

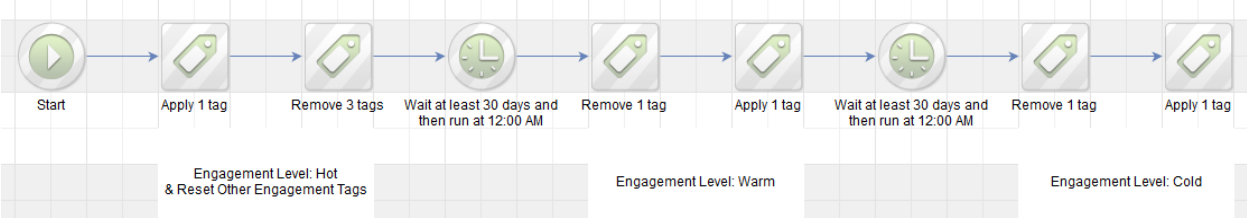
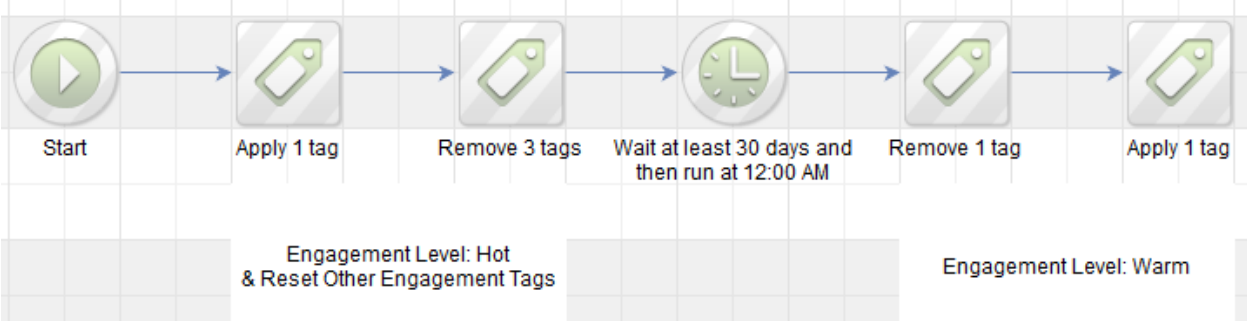
Cancel Save

Configure Tag ×

Apply Remove

Email Engagement -> Warm ×

Cancel
Save

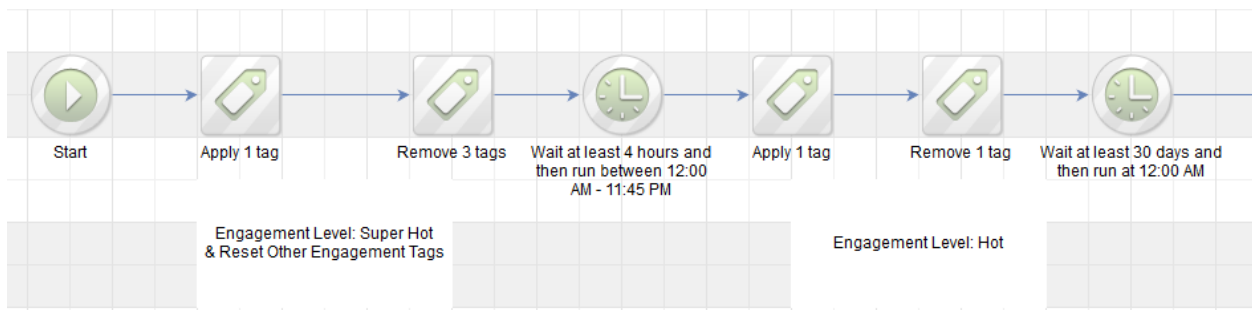


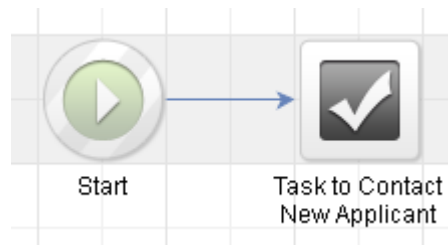
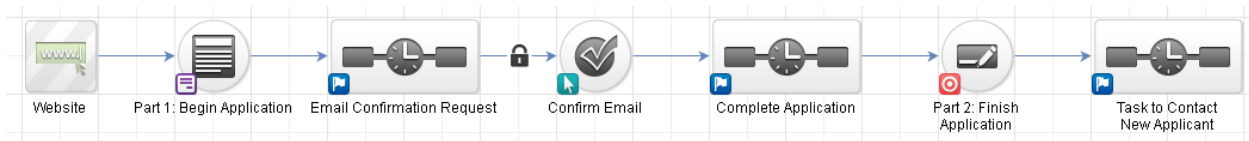
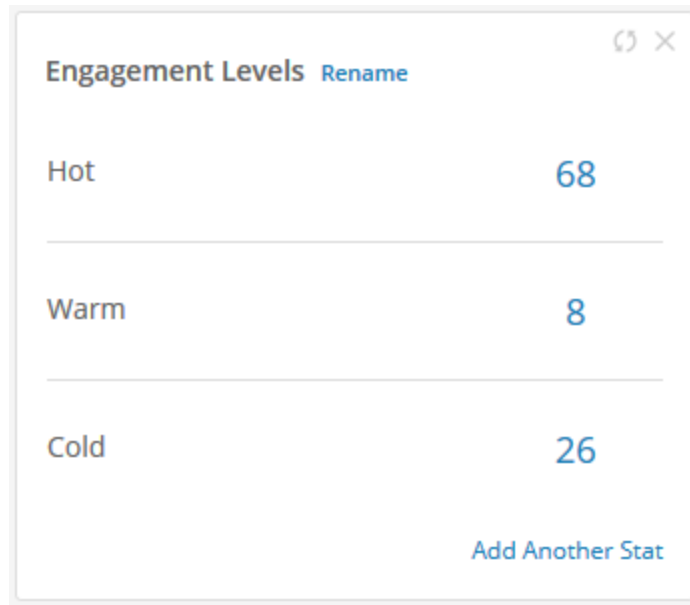
Link Options

Link to:

Which Tags would you like applied when this link is clicked?

If the Contact's	Tags	contains	<input type="text" value="Hot"/>	<input type="text" value="+20"/>	<input type="text" value="4"/> Weeks
If the Contact's	Tags	contains	<input type="text" value="Warm"/>	<input type="text" value="+10"/>	<input type="text" value="4"/> Weeks
If the Contact's	Tags	contains	<input type="text" value="Cold"/>	<input type="text" value="-10"/>	<input type="text" value="--"/> Never





Type	Call
Title	[NEW APPLICANT] -Contact.FirstName Merge
Body	Check out -Contact.FirstName- -Contact.LastName-'s LinkedIn profile (-Contact.Website-) and then call them at -Contact.Phone1- to schedule an interview.
Assign to Contact's owner	<input type="checkbox"/>
Assign to (backup)	Paul Sokol
Days until due	0
Due at	Please select one
Priority	1. Critical

Hidden Field Settings

Which Field: Email

Field Value:

Save Cancel



Employment Application Part 2

Other Field Settings ✕

Which Field Append to Person Notes ▼

Label Share Your Previous Experience:

Required On ↔

Save Cancel

Employment Application Part 2

Share Your Previous Experience: *

Do you have any special skills or qualifications? *

Why do you want to work for us? *

Submit Button Settings [X]

Button Label

Alignment ▼

Advanced Styling Off

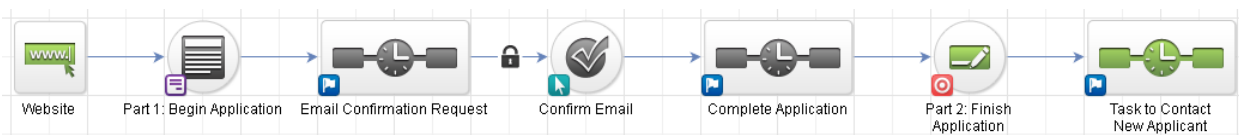
Custom Size Off

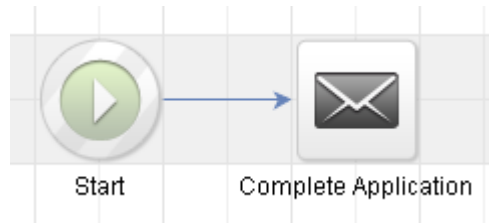
[Save] [Cancel]



Thanks for applying, ~Contact.FirstName~!

We will contact you shortly to schedule an interview.





Subject:

Format Insert Snippets

Format Trebuchet MS 12pt [List Icons] [List Icons] [List Icons] [List Icons]

B *I* U ABC [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons]

Thanks for confirming your email address ~Contact.FirstName~!

To complete your employment application, click here to complete part 2.

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

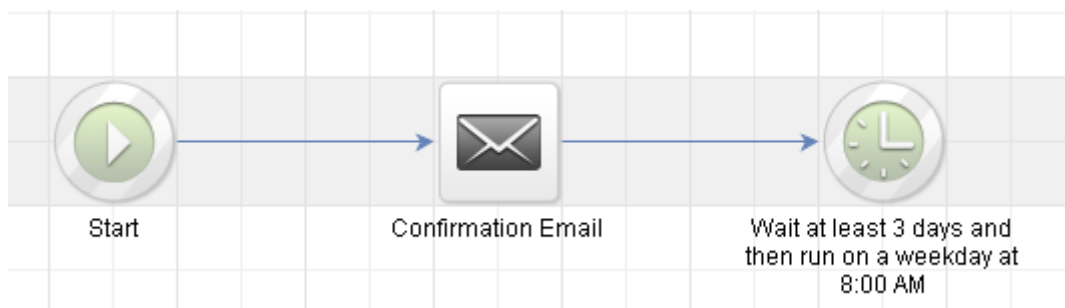
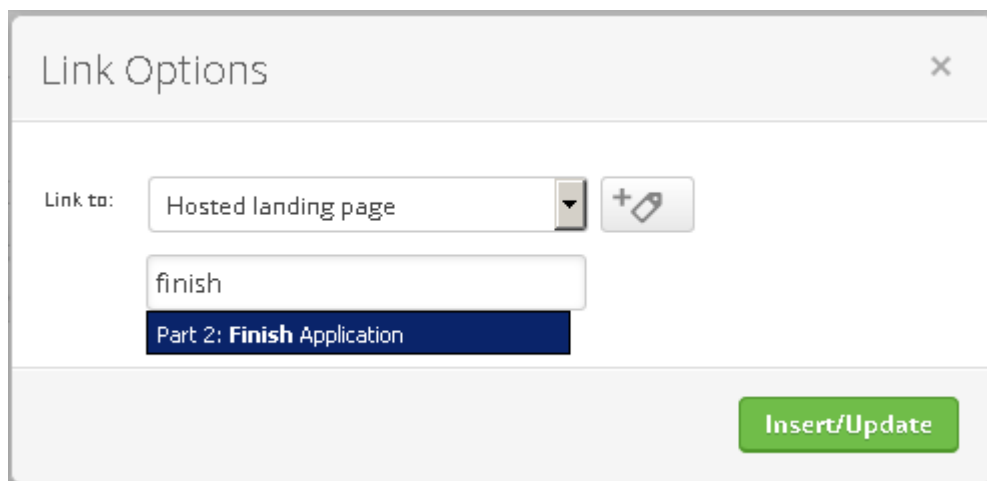
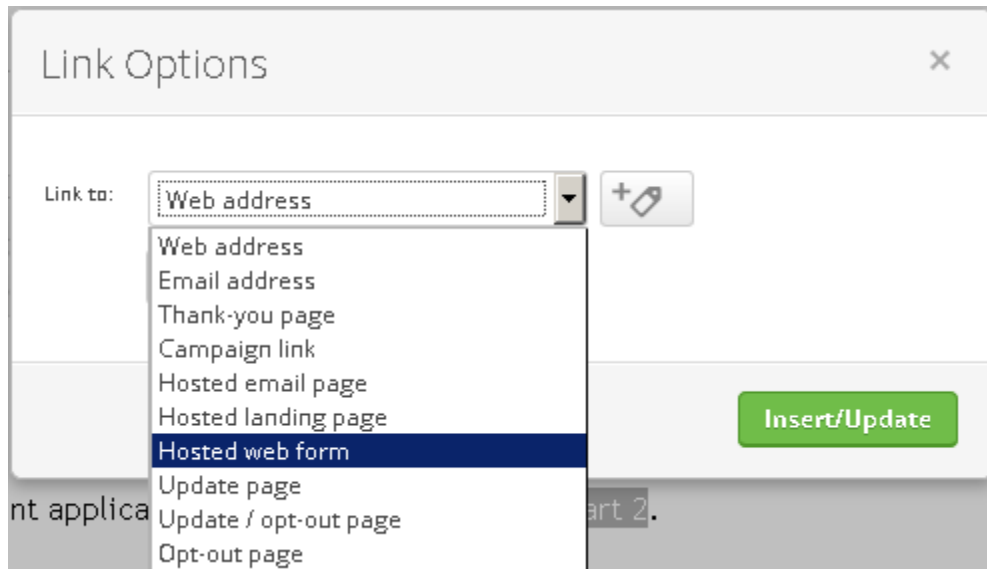
Format Insert Snippets

Format Trebuchet MS 12pt [List Icons] [List Icons] [List Icons] [List Icons]

B *I* U ABC [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons]

Thanks for confirming your email address ~Contact.FirstName~!

To complete your employment application, **click here to complete part 2.**



Subject: Proceed to Step 2

Merge



Format

Insert

Snippets

Format Font family Font size Link Paste as Text: Off Find
Unlink Find & Replace

Hello ~Contact.FirstName~,

Thanks for beginning your application with ~Company.Company~. Before we send you to Step 2, we want to verify your email address and confirm your desire to apply.

After confirming, we will send you another email so you can complete Step 2.

To confirm your request, please [click here](#).

Clicking the link above will confirm your email address and allow you to receive the information you requested. If you do not want to receive any communication, please ignore this message.



Employment Application Part 1

Other Field Settings ✕

Which Field Website

Label LinkedIn URL

Required Off

Save Cancel



Employment Application Part 1

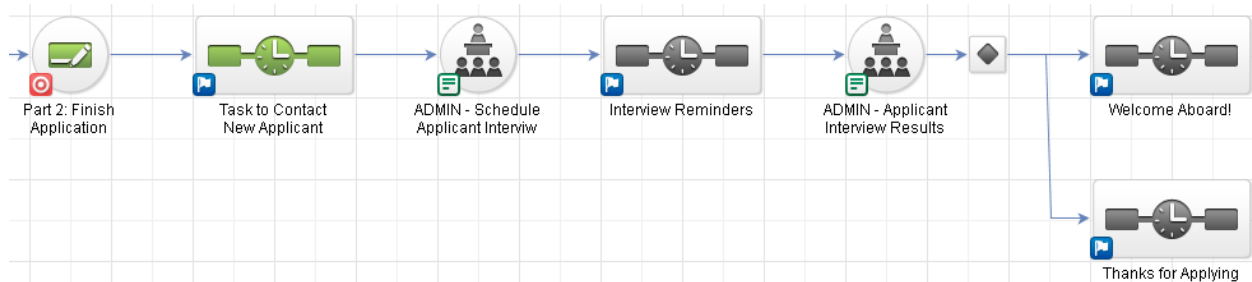
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Phone *	<input type="text"/>
Email *	<input type="text"/>
LinkedIn URL	<input type="text"/>

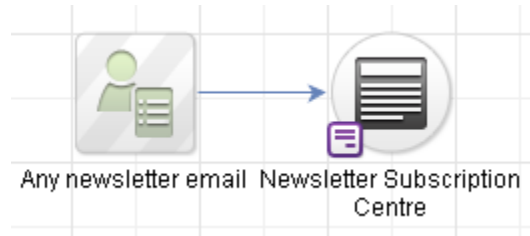
Proceed to Step 2



Thanks for beginning your application,
~Contact.FirstName~!

Before completing step 2, you'll need to confirm your email address. Check your inbox right now for the link!





Manage Your Email Subscription Below!

Hidden Field Settings ✕

Which Field

Field Value

Other Field Settings ✕

Which Field Subscription 1 ▼

Label Subscription 1

Required On ↔

Save Cancel

Submit Button Settings ✕

Button Label Update My Preferences

Alignment Center ▼

Advanced Styling Off ↔

Custom Size Off ↔

Save Cancel



Manage Your Email Subscription Below!

Hidden Field (Email)

Subscription 1 *

No

Update My Preferences



Thanks for updating your email preferences,
~Contact.FirstName~!

You may now close this window

Design

Thank-you Page

Settings

Code

Auto-populate Form [?](#)

Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email

Subject: hey Merge

HTML Plain Text

Format Insert

Format Font family Font size

B *I* U ABC A ab

Hey ~Contact.FirstName~,
 Hope you enjoy this short, o
 Have a great ~Date.DayOfWeek~,
 ~Owner.FirstName~

To update your email preferences, [click here](#)

[Update Your Information or Unsubscribe](#)
 124 N California St. Unit 22 Chandler, Arizona 85225 United States

Link Options ×

Link to: Hosted web form +

Newsletter Subscription Centre

Insert/Update



Manage Your Email Subscription Below!

Hidden Field (Email)

Subscription 1 *

Subscription 2 *

Update My Preferences

Elivagar

Save

Please select one

None

Music Updates Only

Live Show Updates Only

All Updates

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Lead Generation



Web Tracking

[Get Tracking Code](#)
[Web Analytics](#)
[Visitors](#)



Lead Sources

[Edit / View Lead Sources](#)
[Create Lead Source](#)

General Information

Name	<input type="text" value="June '15 - Herald Ad"/>	
Description	<input type="text" value="We bought an ad in the local Herald in June."/>	
Category	<input type="text" value="Please select a lead source cate..."/>	<input type="button" value="Edit Category"/> <input type="button" value="Add Category"/>
Vendor	<input type="text" value="Please select a vendor"/>	<input type="text" value="(Other)"/>
Medium	<input type="text" value="Please select a medium"/>	<input type="text" value="(Other)"/>
Message/Content	<input type="text" value="Please select a message/content"/>	<input type="text" value="(Other)"/>
Start Date	<input type="text"/>	
End Date	<input type="text"/>	
Status	<input type="text" value="Active"/>	

June '15 - Herald Ad

General

Expenses

General

Expenses

Add Expense ✕

Occurrence

Type ?

Date Incurred

Details

Title

Amount

Notes

Found in the Business section

June '15 - Herald Ad

[General](#) [Expenses](#)

Total Expenses: \$250.00

Recurring Schedule

Edit	Title	Amount	Start Date	End Date	Next Expense Date	Notes	Delete
No results to display.							

Recent Expenses

Edit	Title	Amount	Date Incurred	Notes	Delete
[Edit]	Herald Ad	\$250.00	Jun 17, 2015	Found in the Business section	[Delete]

Lead Source ROI

[Actions](#) ▾
 [Start over](#)
[Edit Criteria/Columns...](#)
[Save...](#)
[Print...](#)

1-50 of 90 per page

Lead Source	Category	Expenses	Revenue	Roi
AYIG-Facebook		\$100.00	\$875.00	775%
2013 USSSA Beach Blast	GP	\$2,035.36	\$2,781.00	37%
[E] ELI1 Shirt	Paid	\$214.66	\$0.00	-100%

Sequence Step Recipients	This shows Contacts that have received an item within a Sequence
Lead Source ROI	This shows ROI by leadsource.
Lead Source ROI By Category	This shows ROI by leadsource category.
Web Analytics	This shows the pages that have been tracked by your tracking code.

2013 USSSA Beach Blast [\(back to search results\)](#)

[General](#)
[Expenses](#)

[Add Expense](#)

Total Expenses: \$2,035.36
 Contacts: 1 | Cost Per Contact: \$2,035.36

General Information

Name	<input type="text" value="[E] Meerkat Profile"/>	<input type="button" value="Edit"/>
Description	<input type="text" value="In Meerkat profile"/>	
Category	<input type="text" value="Social"/>	<input type="button" value="Edit Category"/> <input type="button" value="Add Category"/>
Vendor	<input type="text" value="Meerkat"/>	<input type="text" value="(Other)"/>
Medium	<input type="text" value="Profile"/>	<input type="text" value="(Other)"/>
Message/Content	<input type="text" value="Profile"/>	<input type="text" value="(Other)"/>

Status	<input type="text" value="Active"/>
	<input type="button" value="Save"/> <input type="button" value="Save"/>


- Please select a status
- Active
- Inactive


Add Expense



Occurrence

Type 

Start Date 

End Date 

Details

Title

Amount

Notes

Cancel

Save

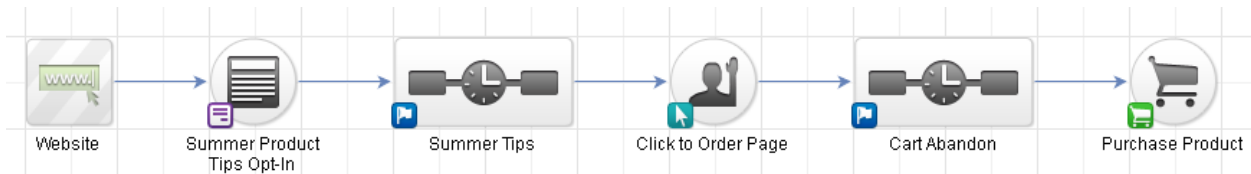
Hidden Field Settings ✕

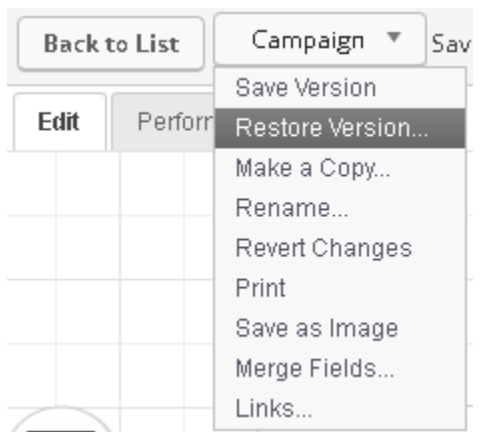
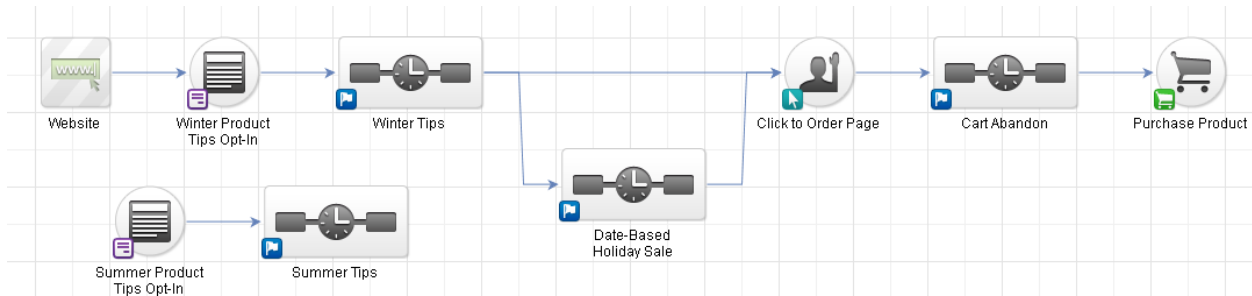
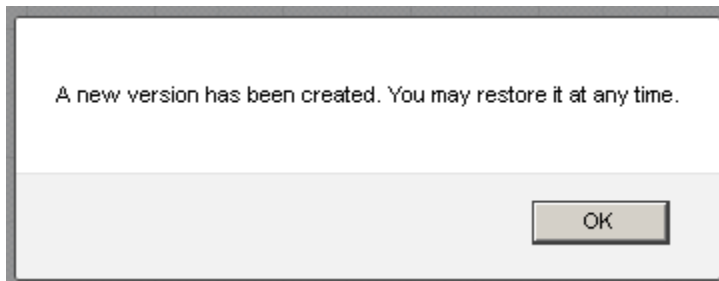
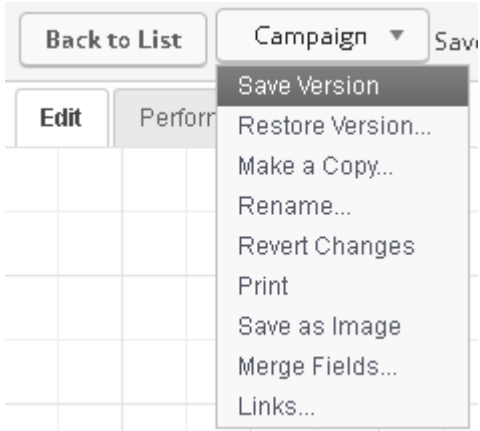
Which Field

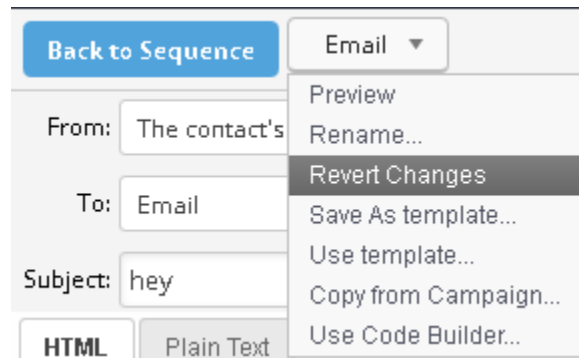
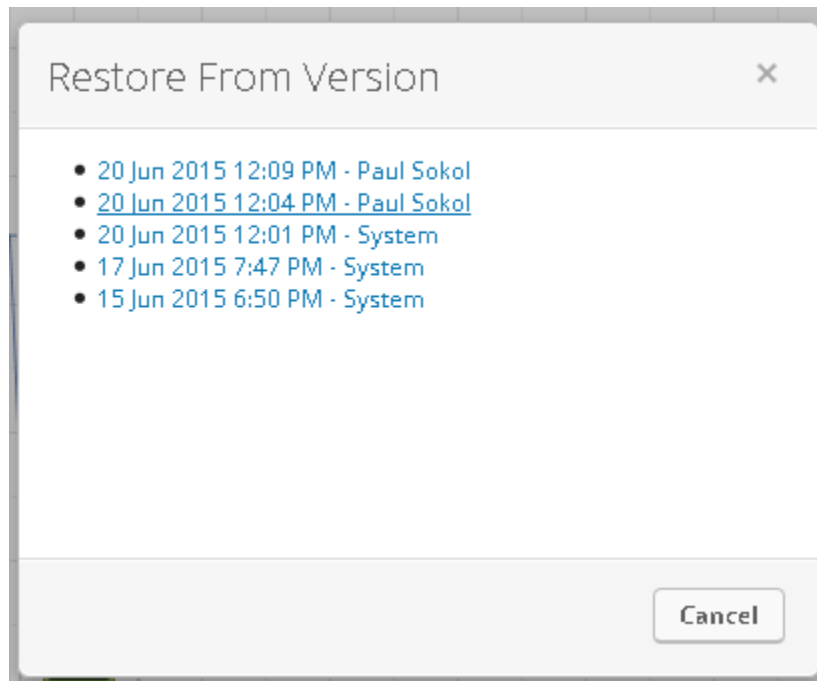
Field Value

1-50 of 90 per page

<input checked="" type="checkbox"/>	Id	Name
<input checked="" type="checkbox"/>	187	June '15 - Herald Ad







Contacts

Actions ▾ Start over Edit C

- Apply Action Set
- Apply/Remove Tag
- Assign to Company
- Create Opportunities
- Create Referral Partner Referral
- Create a Task
- Create an Appointment
- Delete Contacts
- Export
- Mass Update Contacts
- Merge Duplicate Contacts
- Print Labels
- Reassign Contacts (Batch)
- Reassign Contacts (Datasheet)
- Reassign Contacts (Multi-user)
- Send a Broadcast (Email, Fax, etc.)
- Start/Stop a Campaign (Legacy)
- Start/Stop a Campaign Sequence**
- Start/Stop a Follow-up Sequence
- Update Opt-In/Out Status

Start/Stop a Campaign Sequence

Your search returned **1 result**. This action will assign contacts to a Campaign

Start ▾ PS.ME - Newsletter (Capture Lea... ▾ Tagging + Confirmation Request ▾

[Process Action](#) [Cancel and Return to Contacts](#)

Start/Stop a Campaign Sequence

Your search returned **1 result**. This action will assign contacts to a Campaign

Stop ▼ PS.ME - Newsletter (Capture Lea... ▼

Process Action

Cancel and Return to Contacts

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities	Contacts Companies Opportunities Referral Partners Visitors	Campaign Builder Email & Broadcasts Lead Generation Templates Legacy	E-Commerce Setup Orders Products Actions Promotions Legacy	Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Clean Up Your Data

[Modify Existing Records](#)

This allows you to update existing records in Infusionsoft by importing a csv file that contains the corresponding Infusionsoft ids.

[Check for Duplicate Contact Records](#)

This allows you to find duplicate contact records in your database.

Choose Who to Check

Choose Who to Check

- Check all records. (May take a long time).
- Check all records that haven't been marked as a dup already.
- Check records that haven't been checked already.

Next

This will automatically begin the deduping process. Are you sure you want to continue?

OK

Cancel

Check List For Duplicates

Your action has started and is **56% complete**.



550 of 969

 Your action has completed!

You successfully checked for duplicates on 969 contact records.

[View the list of contact records that are considered duplicates](#)

[Go back to clean up more of your data](#)

[Click here to see all of your contacts](#)

 Choose Who to Check

Choose Who to Check

- Check all records. (May take a long time).
- Check all records that haven't been marked as a dup already.
- Check records that haven't been checked already.

Stages

- STAGE 1: First Name + Last Name + One Other Field**
 - CHECK: FirstName + LastName + Company
 - CHECK: FirstName + Email
 - CHECK: LastName + Email
 - CHECK: FirstName + LastName + StreetAddress1
 - CHECK: FirstName + LastName + Fax1
 - CHECK: FirstName + LastName + Phone1
- STAGE 2: Email + One Other Field**
 - CHECK: Email + Fax1
 - CHECK: Email + StreetAddress1
 - CHECK: Email + Phone1
- STAGE 3: One Field Check**
 - CHECK: Email

<u>My Nav</u>	<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data <li style="background-color: #cccccc;">Data Cleanup
<ul style="list-style-type: none"> Edit 	<ul style="list-style-type: none"> Reports Settings 	<ul style="list-style-type: none"> Reports Settings 	<ul style="list-style-type: none"> Reports Settings 	<ul style="list-style-type: none"> Reports Settings

Clean Up Your Data

Modify Existing Records

This allows you to update existing records in Infusionsoft by importing a csv file that contains the corresponding Infusionsoft ids.

Check for Duplicate Contact Records

This allows you to find duplicate contact records in your database.

View Duplicate Contact Records

View a list of contact records that are considered duplicates.

Duplicate Contact Search

No options available 

Actions

1-3 of 3 per page

Manual merge	Dup id	Dup first name	Dup last name	Dup email	Orig id	Orig first name	Orig last name	Orig email
[Manual Merge]	2228	Paul	Sokol	paul.sokol@infusionsoft.com	44	Paul	Sokol	paul.sokol@infusionsoft.com

Merge Contact Fields

Merge Contact Fields

Fields	Contact	Merged Contact	More Recent Contact
Id:	44	<input type="text" value="44"/>	<input type="text" value="2228"/>
First Name:	Paul	<input type="text" value="Paul"/>	<input type="text" value="Paul"/>
Last Name:	Sokol	<input type="text" value="Sokol"/>	<input type="text" value="Sokol"/>
Company:	Infusionsoft	<input type="text" value="Infusionsoft"/>	<input type="text" value=""/>
Job Title:	Done FOR YOU Campaign Champion	<input type="text" value="Done FOR YOU Campaign Champio"/>	<input type="text" value=""/>

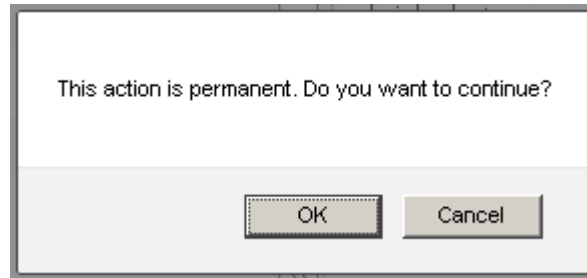
MKTPL-NPS
Comments:

Submitted an 8

>>

Submitted an 8

<<



Clean Up Your Data

Modify Existing Records

This allows you to update existing records in Infusionsoft by importing a csv file that contains the corresponding Infusionsoft Ids.

Check for Duplicate Contact Records

This allows you to find duplicate contact records in your database.

View Duplicate Contact Records

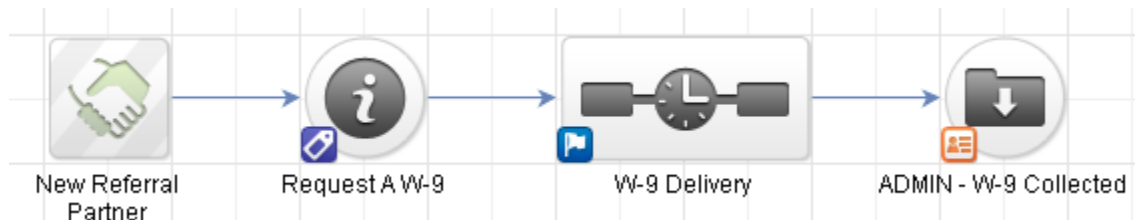
View a list of contact records that are considered duplicates.

Merge Duplicate Contact Records By Overwriting Old Data With New Data

This will overwrite all older data with the newest data for all duplicate contact records.

Merge Duplicate Contact Records By Only Adding New Data, Not Overwriting Old Data

This will only add data that doesn't already exist for all duplicate contact records. This is typically used to ensure that valid email addresses for people are not overwritten.



Configure Tag

This goal is achieved when any of these tags are applied:

Functional -> Request a W-9 ✕

Configure Note Template

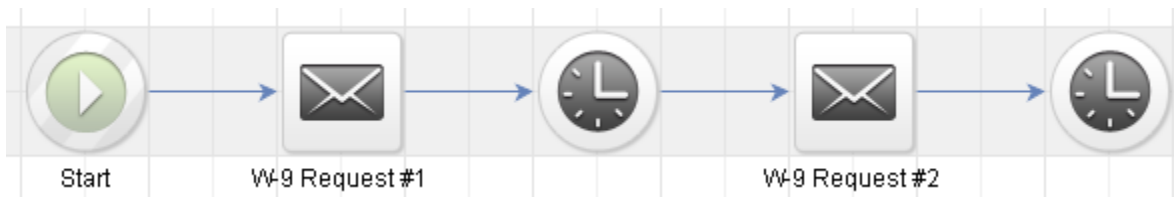
Action Type: UPDATE

Description: W-9 On File

Creation Notes: We have collected a W-9 and have it on file.

User: The logged-in User

Notify: Please select a User



Subject: [ACTION NEEDED] We Need Your W-9 -Contact.FirstName-

Merge

HTML

Plain Text



Format

Insert

Snippets

Format Trebuchet MS 12pt

B *I* U ABC **A** ab

Link Paste as Text: Off

Unlink

Hello ~Contact.FirstName~,

Thanks for being a valued referral partner!

To keep the tax man happy, we need to get a W-9 on file for you.

To make things as easy as possible, all you have to do is download the W-9, fill it out, and then reply to this email with it attached.

Click Here to Download a W-9

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~



Format

Insert

Snippets

Format Trebuchet MS 12pt

B *I* U ABC **A** ab

Link

Unlink

Hello ~Contact.FirstName~,

Thanks for being a valued referral partner!

To keep the tax man happy, we need to get a W-9 on file for you.

To make things as easy as possible, all you have to do is download fill it out, and then reply to this email with it attached.

[Click Here to Download a W-9](#)

Link Options

Link to:

Configure Delay Timer

Summary
Wait at least 1 week and then run on a weekday at 8:00 AM (GMT -07:00) Phoenix

Wait at least	Run on	<input checked="" type="radio"/> At <input type="radio"/> Between
<input type="text" value="1"/> <input type="button" value="↑"/> <input type="button" value="↓"/> <input type="text" value="Week(s)"/>	<input type="text" value="Weekday"/>	<input type="text" value="8"/> <input type="text" value="00"/> <input type="text" value="AM"/>

Chapter 9: Your Dashboard and Reporting - Make Better Decisions

<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Companies	Email & Broadcasts	Orders	Infusionsoft Account
Opportunities	Lead Generation	Products	Users
Referral Partners	Templates	Actions	Import Data
Visitors	Legacy	Promotions	Data Cleanup
Legacy		Legacy	
Reports Settings	Reports Settings	Reports Settings	Reports Settings

Contacts

- Search
- General
- Address
- Phone/Email
- Custom Fields
- Misc Criteria
- Columns

Search Criteria

First Name

Last Name

Company

Email

Opportunity Scoring

Tag Ids

- Email Engagement -> Manti
- eSubscriptions -> Early PS.ME Blog
- eSubscriptions -> Fifi Watch
- eSubscriptions -> Manti Promos
- eSubscriptions -> Newsletter
- eSubscriptions -> PS.ME**
- eSubscriptions -> PS.ME w/IS
- eSubscriptions -> Received 1st Newsletter

Contacts

- Search
- General
- Address
- Phone/Email
- Custom Fields
- Misc Criteria
- Columns

Customize Columns on Search Results

Custom Columns:

Name ^ v x

Available Fields:

- Id
- First name
- Last name
- Spouse name
- Birthday
- Birthday month
- Birthday year
- Company
- Phone 1
- Phone 2
- Phone 3
- Email**
- Email address 2
- Email address 3
- Fax 1
- Fax 2
- Street address 1
- Street address 2
- City

Customize Columns on Search Results

Custom Columns:

Name ^ v x




Email ^ v x




Available Fields:

- Id
- First name
- Last name
- Spouse name
- Birthday
- Birthday month
- Birthday year
- Company
- Phone 1
- Phone 2
- Phone 3
- Email address 2
- Email address 3
- Fax 1
- Fax 2
- Street address 1
- Street address 2
- City
- State

Customize Columns on Search Results

Custom Columns:

Name   

Email   

Available Fields:

Id

First name

Last name

Spouse name

Birthday

Birthday month

Birthday year

Company

Phone 1

Phone 2

Phone 3

Email address 2

Email address 3

Fax 1

Fax 2

Street address 1

Street address 2

City

State



Sort By: Last name  Then By: First name 

Search

Reset Filters

Contacts

Actions ▾

Start over

Edit Criteria/Columns...

Save...

Print...

1-50 of 79

50 per page

< 1 2 >

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	
<input checked="" type="checkbox"/>	Jeri	
<input checked="" type="checkbox"/>	Jess	
<input checked="" type="checkbox"/>	Kristin	
<input checked="" type="checkbox"/>	Michele	
<input checked="" type="checkbox"/>	Sam	

Contacts

Actions ▾

Start over

Edit Criteria/Columns...

Save...

Print...

Save this search

Name:

Who would you like to share this search with?

- Everyone
- John Odell
- Paul Sokol**
- Paul Sokol
- Steven Gabriele

Add this search to the User Home.

Save

Contacts: www.paulsokol.me Newsletter

Actions Start over Edit Criteria/Columns... Save Print... Options

1-50 of 79 50 per page < 1 2 >

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	
<input checked="" type="checkbox"/>	Jeri	
<input checked="" type="checkbox"/>	Jess	
<input checked="" type="checkbox"/>	Kristin	
<input checked="" type="checkbox"/>	Michele	

- www.paulsokol.me Newsletter
- DHS '14 - Booked Bands
- DHS '14 - Potential Bands
- DOWF - Potential Sponsors
- Elivagar - All Updates
- Elivagar - Live Show Updates
- Elivagar - Music Updates
- Elivagar - No Updates
- Email Engagement - Cold
- Email Engagement - Hot
- Email Engagement - Warm
- Fifi Watch List
- PS.ME - Inaugural List
- PS.ME - Newsletter - 09/13 - Vote: Branded
- PS.ME - Newsletter - 09/13 - Vote: Plain
- PS.ME - Newsletter List
- PS.ME - Newsletter w/IS List
- PS.ME - On both lists
- Resultants
- SC-Graduates
- www.paulsokol.me Newsletter

Marketing

Campaign Builder Email & Broadcasts Lead Generation



- Send a Broadcast (Email, Fax, etc.)
- View Email Broadcasts

E-Commerce

E-Commerce Setup Orders Products



- View Orders
- Add an Order
- View Subscriptions
- Add a Subscription
- Enter a Payment
- Process a Refund

Actions Start over Edit Criteria/Columns...

1-21 of 21 50

<u>CRM</u>	<u>Marketing</u>	<u>E-Commerce</u>	<u>Admin</u>
<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Reports Settings	Reports Settings	Reports Settings	Reports Settings

Custom Columns:

^ v x

^ v x

Customize Columns on Search Results

Custom Columns:

Name ^ v x

Email ^ v x

Available Fields:

- Id
- First name
- Last name
- Spouse name
- Birthday
- Birthday month
- Birthday year
- Company
- Phone 1
- Phone 2
- Phone 3
- Email address 2
- Email address 3
- Fax 1
- Fax 2
- Street address 1
- Street address 2
- City
- State

Sort By: Last name v Then By: First name v

1-50 of 79 50 per page < 1 2 >

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	



Contacts: www.paulsokol.me Newsletter

1-50 of 79 per page < 1 2

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	
<input checked="" type="checkbox"/>	Jeri	

- Save As...
- Rename...
- Delete...
-
- Add to Favorites...**
- Share/Unshare...
- Email saved search...

Favorites Link Info

Info To create a Category that expands by default, put a * at the end of its name.

Link Category (Other)

Website URL

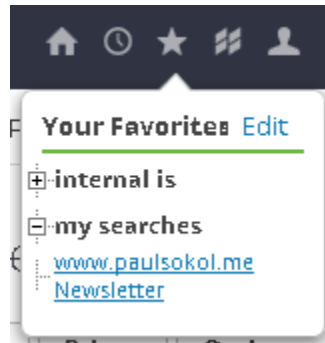
Name

Open in:

Share This Link

Create Link For: This section allows you to create a copy of the link for other users.

If they already have it, they will be skipped.



Contacts: www.paulsokol.me Newsletter

Actions ▾ Start over Edit Criteria/Columns... Save Print... Options ▾

1-50 of 79 50 per page < 1 2

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	
<input checked="" type="checkbox"/>	leri	

- Save As...
- Rename...
- Delete...
-
- Add to Favorites...
- Share/Unshare...
- Email saved search...

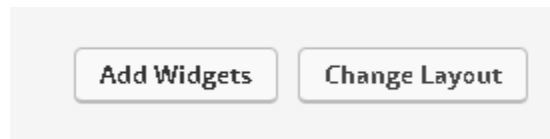
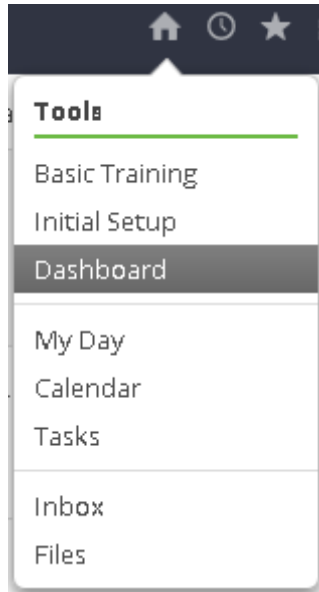
 Contacts: www.p

Actions ▾ **Start over** **Edit C**

- Apply Action Set
- Apply/Remove Tag
- Assign to Company
- Create Opportunities
- Create Referral Partner Referral
- Create a Task
- Create an Appointment
- Delete Contacts
- Export
- Mass Update Contacts
- Merge Duplicate Contacts
- Print Labels
- Reassign Contacts (Batch)
- Reassign Contacts (Datasheet)
- Reassign Contacts (Multi-user)
- Send a Broadcast (Email, Fax, etc.)
- Start/Stop a Campaign (Legacy)
- Start/Stop a Campaign Sequence
- Start/Stop a Follow-Up Sequence
- Update Opt-In/Out Status

Actions ▼ **Start over** **Edit C**

- Apply Action Set
- Apply/Remove Tag
- Assign to Company
- Create Opportunities
- Create Referral Partner Referral
- Create a Task
- Create an Appointment
- Delete Contacts
- Delete Opportunities
- Export
- Mass Update Contacts
- Mass Update Opportunities
- Merge Duplicate Contacts
- Print Labels
- Quick Edit Opportunities
- Reassign Contacts (Batch)
- Reassign Contacts (Datasheet)
- Reassign Contacts (Multi-user)
- Reassign Opportunities (Batch)
- Reassign Opportunities (Multi-user)
- Reassign Opportunities (Quick Edit)
- Send a Broadcast (Email, Fax, etc.)
- Start/Stop a Campaign (Legacy)
- Start/Stop a Campaign Sequence
- Start/Stop a Follow-Up Sequence
- Update Opt-In/Out Status



Add Dashboard Widgets

[Back to Dashboard](#)



Recent Activity

This shows you who has recently opened an email, clicked a link, opted-out, reported spam, filled out a web form, and more.

[Add to Dashboard](#)



RSS Feed

Get the latest news from Infusionsoft or another website of your choice.



[Add to Dashboard](#)



Custom Statistics

View important stats that you would like to monitor. You can show a summary of any saved search or report.

[Add to Dashboard](#)

Custom Statistics [Rename](#)



Saved Search Saved Report

COUNT: Show how many record... ▼

All categories ▼

- All categories
- Contact**
- Opportunity

Stat Title

PS.ME - Inaugural List

PS.ME - Newsletter - 09/13 - Vote: Branded

PS.ME - Newsletter - 09/13 - Vote: Plain

PS.ME - Newsletter List

PS.ME - Newsletter w/IS List

PS.ME - On both lists



Resultants

SC-Graduates

www.paulsokol.me Newsletter ▼


Please select a saved search ▼


Stat Title


 

Custom Statistics [Rename](#)

Saved Search Saved Report



COUNT: Show how many record... 

Contact 

www.paulsokol.me Newsletter 

Stat Title

PS.ME Newsletter Subscribers


 

Custom Statistics [Rename](#)

PS.ME Newsletter Subscribers 79

[Add Another Stat](#)

Saved Search Saved Report

COUNT: Show how many record... 

- COUNT: Show how many records there are in a search or report**
- SUM: Add up the numbers from one of the columns in a search or report and show the total
- AVERAGE: Calculate the average of the numbers from one of the columns in a search or report
- MAX: Show the biggest number from one of the columns in a search or report
- MIN: Show the smallest number from one of the columns in a search or report

Custom Statistics [Rename](#)

Saved Search Saved Report

SUM: Add up the numbers from ...



Order

All Order Records

OrderTotal

Stat Title

All Orders

Custom Statistics Rename		 
PS.ME Newsletter Subscribers		79
<hr/>		
All Orders		\$5,094.00
		Add Another Stat

Custom Statistics [Rename](#)

PS.ME Newsletter Subscribers	79
All Orders	\$5,094.00

[Add Another Stat](#)

Custom Statistics [Rename](#)

Saved Search Saved Report

COUNT: Show how many record... ▾

All categories ▾

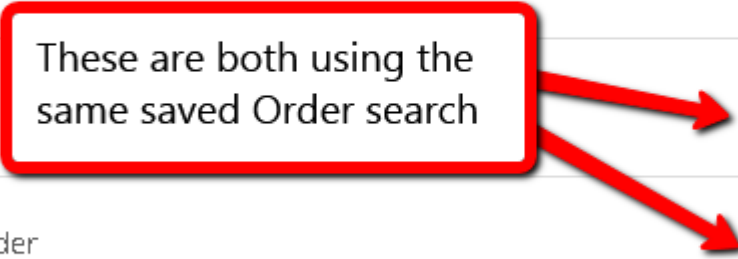
Please select a saved report ▾

Custom Statistics [Rename](#)


PS.ME Newsletter Subscribers	79
All Orders	\$5,094.00
Average Order	\$221.48

[Add Another Stat](#)

These are both using the same saved Order search




Choose Your Layout ×




1 Wide Column & 1 Narrow Column
For smaller monitors (no offense)

[Use This](#)




2 Wide Columns
For bigger monitors (1440px & wider)

[Use This](#)



1 Wide Column & 2 Narrow Columns
Option #2 for bigger monitors (1440px & wider)

[Use This](#)



2 Wide Columns & 1 Narrow Column
For large monitors

Current Layout

Dashboard - July 03, 2015

Appointments ⊞ ×

View for Paul Sokol on 07-03-2015 🇺🇸

There are no items to display.

[+ New Appointment](#)
[+ New Task](#)

My Sponsor Pipeline ⊞ ×

DOF - New Sponsor Opp	0
DOF - Contacting	0
DOF - Engaging	0
DOF - Qualified	0
DOF - Sponsor Packet Sent	0



Saved Search or Saved Report

Displays up to the first 20 results of any search or report.

Add to Dashboard

Save this search

Name:

Who would you like to share this search with?

- Everyone
- John Odell
- Paul Sokol**
- Paul Sokol
- Steven Gabriele

Add this search to the User Home.

Save



Fulfillment Jobs

Provides a list of fulfillment jobs assigned to you.

Add to Dashboard

The screenshot shows a user profile dropdown menu. At the top, there is a navigation bar with icons for home, clock, star, list, user, and help, along with a search bar containing the text "Find a co". Below the navigation bar, the dropdown menu is open, displaying the user's name "Hi, Paul!" and a list of options: "Edit My Profile", "Manage Accounts", and "Log Out". To the right of these options, under the heading "Your Accounts", there is a list of accounts: "PM", "Infusionsoft Community", "JB Photography", "jiveSYSTEMS", "ICON14 Demo App", "KSAX", "Primary", and "VYKS CH". Each account is preceded by a small green icon.



Add/Edit User Accounts [\(back to search results\)](#)

General

Preferences

Signatures

Notes

User Groups

Misc

Default Tab on Contact Second Row

Tasks



Default Search Type

Contact

Default Start Page

Infusionsoft Training

My Nav (top link)

Dashboard

Custom



The screenshot shows a dark header bar with a green and grey logo on the left and the text "E-Co" on the right. Below the header, a dropdown menu is open, displaying the following items: "My Nav" (highlighted with a green underline), "Contacts", "Campaign Builder", "Email & Broadcasts", "Legacy", "Templates", and "Opportunities". At the bottom of the dropdown is a grey button labeled "Edit".

Misc

Default Tab on Contact Second Row ?

Default Search Type

Default Start Page Infusionsoft Training My Nav (top link) Dashboard Custom ?

Contacts: www.paulsokol.me Newsletter

www.paulsokol.me Newsletter

Actions Start over Edit Criteria/Columns... Save Print... Options

1-50 of 79 50 per page < 1 2

<input checked="" type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Chris	
<input checked="" type="checkbox"/>	Jeri	

Options

- Save As...
- Rename...
- Delete...
-
- Add to Favorites...
- Share/Unshare...
- Email saved search...

Manage Saved Search Notification Email

Up to 1,000 records will be sent through email. For larger lists, we recommend manually exporting the list.

Information

Notify @gmail.com

Only Send When Results Found Yes No

Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Save

Save and Send Now

My Nav		CRM		Marketing		E-Commerce		Admin	
Contacts		Contacts		Campaign Builder		E-Commerce Setup		Branding Center	
Campaign Builder		Companies		Email & Broadcasts		Orders		Infusionsoft Account	
Email & Broadcasts		Opportunities		Lead Generation		Products		Users	
Legacy		Referral Partners		Templates		Actions		Import Data	
Templates		Visitors		Legacy		Promotions		Data Cleanup	
Opportunities						Legacy			
Edit		Reports	Settings	Reports	Settings	Reports	Settings	Reports	Settings

Search Criteria

Opportunity Title

First Name

Last Name

Opportunity Scoring

Next Action Date

Date Range

Stage
















- DOF - New Sponsor Opp
- DOF - Contacting
- DOF - Engaging
- DOF - Qualified
- DOF - Sponsor Packet Sent
- DOF - Contract Sent

Owner

- Unassigned
- Current User
- John Odell
- Paul Sokol

Customize Columns on Search Results

Custom Columns:

- Opportunity   
- Contact name   
- Stage   
- Next action date   
- Next action notes   

Available Fields:

- Id
- Contactid
- Opportunityid
- Phone 1
- Batch email address
- First name
- Last name
- Street address 1
- City
- State
- Postal code
- Lead Source
- Owner
- Opportunity notes
- Campaigns
- Budget
- Projected revenue high
- Projected revenue low
- Product interest id



Sort By: Then By:

Opportunities

[Actions](#)[Start over](#)[Edit Criteria/Columns...](#)[Save...](#)[Print...](#)

0-0 of 0 per page

Save this search

Name:

Who would you like to share this search with?

Everyone	▲
John Odell	
Paul Sokol	
Paul Sokol	
Steven Gabriele	▼

Add this search to the User Home.

Opportunities: My Opportunities

Search

Contact

Opportunity

Misc Criteria

Custom Fields

Columns

Tag Ids With ANY of these T...

- 02.04.14 - Decline Upsell 1
- 02.04.14 - Decline Upsell 2
- 02.04.14 - Downsell 1 Take
- 02.04.14 - Upsell 1 Take
- 02.04.14 - Upsell 2 Take
- 02.04.14 Decline Downsell 1
- Contact Us Submission

Tags 2 With ANY of these T...

- 02.04.14 - Decline Upsell 1
- 02.04.14 - Decline Upsell 2
- 02.04.14 - Downsell 1 Take
- 02.04.14 - Upsell 1 Take
- 02.04.14 - Upsell 2 Take
- 02.04.14 Decline Downsell 1
- Contact Us Submission

Next Action Date Interval Please select one

Next Action Date Custom Interval 365 days ago and/or -1 days after today.

Opportunities: My Opportunities

Actions

Start over

Edit Criteria/Columns...

Save

Print...

Options

- Save As...
- Rename...
- Delete...
-
- Add to Favorites...
- Share/Unshare...
- Email saved search...

0-0 of 0 50 per page

Opportunity

Contact name

Stage

No results to display

Save this search

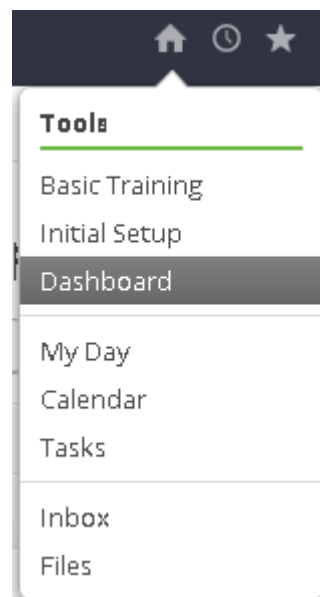
Name:

Who would you like to share this search with?

Everyone
John Odell
Paul Sokol
Paul Sokol
Steven Gabriele

Add this search to the User Home.

Save



Pipeline Stages



View Stats for:

Paul Sokol

	Display
DOF - New Sponsor Opp	<input checked="" type="checkbox"/>
DOF - Contacting	<input checked="" type="checkbox"/>
DOF - Engaging	<input checked="" type="checkbox"/>
DOF - Qualified	<input checked="" type="checkbox"/>
DOF - Sponsor Packet Sent	<input checked="" type="checkbox"/>
DOF - Contract Sent	<input checked="" type="checkbox"/>



Widget Title

My Pipeline

[Edit Pipeline >>](#)

Cancel


Save

Overdue Opportunities



Opportunity	Contact name	Stage	Next action date	Next action notes
No results to display				

Next Action:

All 

Showing 0 of 0


[Settings](#)[View All Results >>](#)

My Opportunities

Opportunity	Contact name	Stage	Next action date	Next action notes
No results to display				

Next Action:

All 

Showing 0 of 0

[Settings](#)[View All Results >>](#)

Calendar Items

View for **Paul Sokal** on **07-21-2015**

There are no items to display.

[+ New Appointment](#) [+ New Task](#)

My Pipeline

DOF - New Sponsor Opp	0
DOF - Contacting	0
DOF - Engaging	0
DOF - Qualified	0
DOF - Sponsor Packet Sent	0
DOF - Contract Sent	0

[Settings](#)

Tasks **Today/Past Due**

There are no items to display.

[+ New Task](#) [View All Results >>](#)

My Opportunities

Opportunity	Contact name	Stage	Next action date	Next action notes
No results to display				

Next Action: **All**

Showing 0 of 0

[Settings](#) [View All Results >>](#)

Overdue Opportunities

Opportunity	Contact name	Stage	Next action date	Next action notes
No results to display				

Next Action: **All**

Showing 0 of 0

[Settings](#) [View All Results >>](#)

My Nav | My Nav

My Nav	CRM	Marketing	E-Commerce	Admin
<ul style="list-style-type: none"> Contacts Campaign Builder Email & Broadcasts Legacy Templates Opportunities 	<ul style="list-style-type: none"> Contacts Companies Opportunities Referral Partners Visitors 	<ul style="list-style-type: none"> Campaign Builder Email & Broadcasts Lead Generation Templates Legacy 	<ul style="list-style-type: none"> E-Commerce Setup Orders Products Actions Promotions Legacy 	<ul style="list-style-type: none"> Branding Center Infusionsoft Account Users Import Data Data Cleanup
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Search [Search](#)

[Actions](#) ▾

1-50 of 180 **50** per page [<](#) [1](#) [2](#) [3](#) [4](#) [>](#)

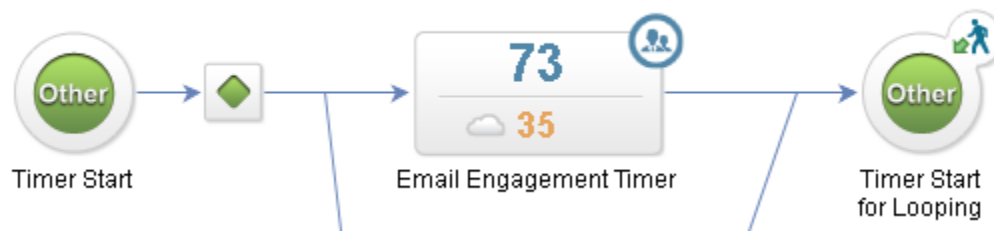
<input checked="" type="checkbox"/>	Id	Name	Active contacts	Published date
<input checked="" type="checkbox"/>	1107	Track Email Engagement	23	5/21/2014 10:46 AM

Click Through Percentage Search By Contact	Click Through Percentage By Contact
Click Through Percentage Search By Email	Click Through Percentage Search By Email
Unique Campaign Contacts	This shows unique Contacts who are in a specific Campaign
Campaign Contacts	This shows Contacts who are being marketed to by Campaign Sequences.
Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.

Campaign Builder

Back to List
Campaign ▾

Edit
Performance




Sequence

- SC-Workflow -> Dummy
- SC-Workflow -> Send GTM Invite
- Sokol Party RSVP Skeleton -> Party Info
- Three Step Web Form - Free Consultation -> Contact to Schedule
- Three Step Web Form - Free Consultation -> Contact to Schedule - Afternoon
- Three Step Web Form - Free Consultation -> Contact to Schedule - Morning
- Three Step Web Form - Free Consultation -> Phone Number Reminder
- Track Email Engagement -> Email Engagement Timer

Status

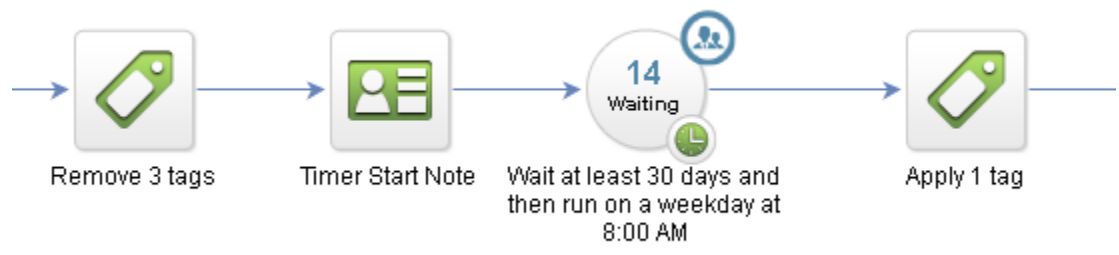
- Active
- Queued
- Done

Tags 2 With ANY of these T... 

- 02.04.14 - Decline Upsell 1
- 02.04.14 - Decline Upsell 2
- 02.04.14 - Downsell 1 Take
- 02.04.14 - Upsell 1 Take
- 02.04.14 - Upsell 2 Take
- 02.04.14 Decline Downsell 1
- Contact Us Submission

Stop Date  - 

Click Through Percentage Search By Email	Click Through Percentage Search By Email
Unique Campaign Contacts	This shows unique Contacts who are in a specific Campaign
Campaign Contacts	This shows Contacts who are being marketed to by Campaign Sequences.
Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.
Campaign Goal Completion	This shows Contacts who have completed Campaign Goals






Scheduled Date  - 

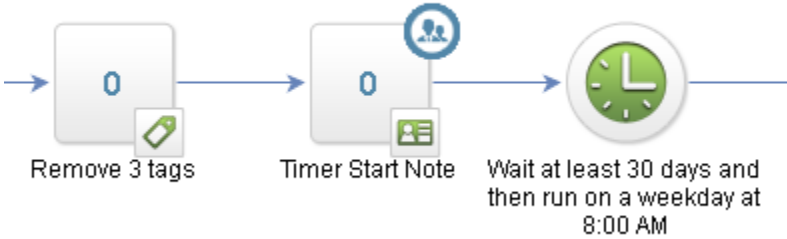
Unique Campaign Contacts	This shows unique Contacts who are in a specific Campaign
Campaign Contacts	This shows Contacts who are being marketed to by Campaign Sequences.
Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.
Campaign Goal Completion	This shows Contacts who have completed Campaign Goals
Sequence Step Recipients	This shows Contacts that have received an item within a Sequence

Campaign Builder

Performance

View:  Active

-  Active
-  **Historical**



[Back to Campaign](#)
Sequence ▾
Email Engagement

Edit
Performance

View: Historical ▾
Unique Contacts: **73**
Displaying: **24 HOURS** ▾

24 HOURS Last 24 hours

30 DAYS Last 30 days

Processed Date -

OK
Cancel
Reset Filters

Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.
Campaign Goal Completion	This shows Contacts who have completed Campaign Goals
Sequence Step Recipients	This shows Contacts that have received an item within a Sequence
Lead Source ROI	This shows ROI by leadsource.
Lead Source ROI By Category	This shows ROI by leadsource category.



- Goal
- T&C 2014 Sandbox -> Purchase Training
 - T&C 2014 Sandbox -> Secondary Ones
 - T&C 2014 Sandbox -> Step 1 - Name and email
 - T&C 2014 Sandbox -> tag is applied form GF fill
 - Three Step Web Form - Free Consultation -> Step 1 - Name/Email
 - Three Step Web Form - Free Consultation -> Step 2 - Phone Number
 - Three Step Web Form - Free Consultation -> Step 3 - Preferred Time of Day
 - Track Email Engagement -> Timer Start**

Goal Completion Date ·

Campaign Contacts	This shows Contacts who are being marketed to by Campaign Sequences.
Campaign Contacts Waiting	This shows Contacts who are waiting for a step within a Campaign Sequence.
Campaign Goal Completion	This shows Contacts who have completed Campaign Goals
Sequence Step Recipients	This shows Contacts that have received an item within a Sequence
Lead Source ROI	This shows ROI by leadsource.

Chapter 10: Pushing the System with Hacks

My Nav	CRM	Marketing	E-Commerce	Admin
Contacts	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Campaign Builder	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Email & Broadcasts	Opportunities	Lead Generation	Products	Users
Legacy	Referral Partners	Templates	Actions	Import Data
Templates	Visitors	Legacy	Promotions	Data Cleanup
Opportunities			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

Marketing Settings

- Default Thank-You Pages
- Lead Sources
- Automation Links
- Action Sets
- Follow-Up Sequence
- Follow-Up Sequence Schedule

Automation Links

Marketing Settings

- Default Thank-You Pages
- Lead Sources
- Automation Links
- Action Sets

Miscellaneous

Edit	Name	Delete
N/A	Hosted Email	N/A

Confirmation Links

[Create Confirmation Link](#)

Manage Opt-In Link

Email Appearance

[Confirmation Page Appearance](#)

Link Information

Name

Link Text Leave blank to display the actual link.

Text Email Display

Info Enter any text you wish to include with the confirmation link merge field.

Link Blurb

Save & Close

Save

https://voyicks.infusionsoft.com/OptOut/manageOptOut.jsp?global=true&view=edit&ID=32&msg=OptIn Added Successfully

Manage Opt-In Link

Email Appearance

Confirmation Page Appearance

Actions

Link Information

Name

Subject: [ACTION NEEDED] A quick mouse click please!

HTML

Plain Text



Format

Insert

Snippets

Format Trebuchet MS 12pt

B *I* U ~~ABC~~ **A** **ab** [List icons] [Quote icon] [Link icon] [Table icon]

Hey ~Contact.FirstName~,

Thanks for signing up!

Real quick, just to make sure you aren't a robot...

~OptIn_32~

Have a great ~Date.DayOfWeek~,

~Owner.FirstName~

Preview

Hey Paul,

Thanks for signing up!

Real quick, just to make sure you aren't a robot...

[Please Click Here to Confirm!](#)

Have a great Wednesday,
Paul

[Update Your Information or Unsubscribe](#)

124 N California St. Unit 22 Chandler, Arizona 85225 United States

Manage Opt-In Link

Email Appearance

Confirmation Page Appearance

Actions

Actions

Apply 1 tag

- Legacy Confirmation Link Clicked

Edit



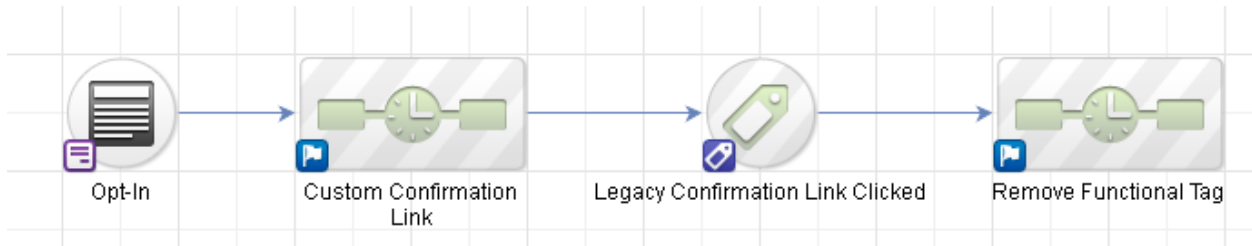
Add New Action



Save & Close

Delete

Save



Campaign Builder

Back to Campaign Sequence Saved at 10:12:43 pm Custom Confirmation Link

Edit Performance

```

    graph LR
      Start((Start)) --> Link[Custom Confirmation Link]
      Link --> Wait3[Wait at least 3 days and then run on a weekday at 8:00 AM]
      Wait3 --> Confirm1[Remember to Confirm!]
      Confirm1 --> Wait4[Wait at least 4 days and then run on a weekday at 5:00 PM]
      Wait4 --> Confirm2[Last Chance to Confirm!]
      Confirm2 --> Wait1[Wait at least 1 week and then run on a weekday at 8:00 AM]
  
```

Manage Opt-In Link

Email Appearance Confirmation Page Appearance Actions

Confirmation Page Display Information

Info When a user clicks the confirmation link from their email client, they will be taken to a custom success page. We require the inclusion of confirmation text at the top of the page, but the remainder of the page can be customized to your needs.

Opt-In Header Your email address, ~Contact.Email~, has been confirmed. You will now receive email communication from ~Company.Company~.

Merge Field for Opt-In Header

Header Color

Page Content

Merge Field for Opt-In Header

Header Color

Page Content



Your email address, NotPaulSokolsRealEmail@gmail.com, has been confirmed. You will now receive email communication from Paul Sokol



Your email address, NotPaulSokolsRealEmail@gmail.com, has been confirmed. You will now receive email communication from Paul Sokol

Update / Opt-Out Links

Create Update / Opt-Out

Edit	Name	Delete
------	------	--------

Manage Opt-Out/Update Link

Link Information

Name

Type

Link Text Leave blank to display the actual link.

Text Email Display

Info **The following fields will help you set up how this opt-out/update link will appear**

Link Blurb

Save & Close

Save

<https://voyicks.infusionsoft.com/OptOut/manageOptOut.jsp?global=true&view=edit&ID=34&msg=OptOut>

Format Insert Snippets

Format Trebuchet MS 12pt

B *I* U ABC **A** ab

Hey ~Contact.FirstName~,

Thanks for signing up!

Real quick, just to make sure you aren't a robot...

~OptIn_32~

Have a great ~Date.DayOfWeek~,
~Owner.FirstName~

~OptOut_34~

Preview

Hey Paul,

Thanks for signing up!

Real quick, just to make sure you aren't a robot...

[Please Click Here to Confirm!](#)

Have a great Thursday,
Paul

[Unsubscribe By Clicking This Link](#)

124 N California St. Unit 22 Chandler, Arizona 85225 United States

Manage Opt-Out/Update Link

Email Appearance

Actions

Actions

Remove 7 tags

- Early PS.ME Blog
- Manti Promos
- Newsletter
- PS.ME
- PS.ME w/IS
- ResultantRevolution
- U-Daul Promos

Edit x

Automation Link

Create Link

Edit	Name	Delete
------	------	--------

Manage Automation Link

Link Information

Link Name (so you can find it easily in Infusionsoft)

IS Cookbook Email Open Automatic

Link Explanation (for Plain Text emails - appears above the link)

245 characters left

Save

Save & Close

General

Actions

Actions

No actions yet. Select an action from the "Add New Action"

Add New Action

Add New Action

Apply/Remove tag

Start/Stop a Campaign (Legacy)

Apply/Remove Tag

To Apply or Remove?

Apply Remove

Apply these Tags

Functional -> Infusionsoft Cookbook Payment Plan
Functional -> Invite to Follow on Twitter
Functional -> IS Cookbook Email Open Automation
Functional -> Newsletter Re-Engage
Functional -> PS.ME June '15 Glimpse Redeemed
Functional -> PS.ME June '15 Open
Functional -> Request a W-9
Functional -> Start Birthday Collection
Functional -> Start Campaign B
Functional -> Start PS.ME May '15
Functional -> Start Refer a Friend

[Create a new Tag...](#)

Only run this action when certain rules are met

Save Cancel

General

Actions

Actions

Apply 1 tag

- IS Cookbook Email Open Automation

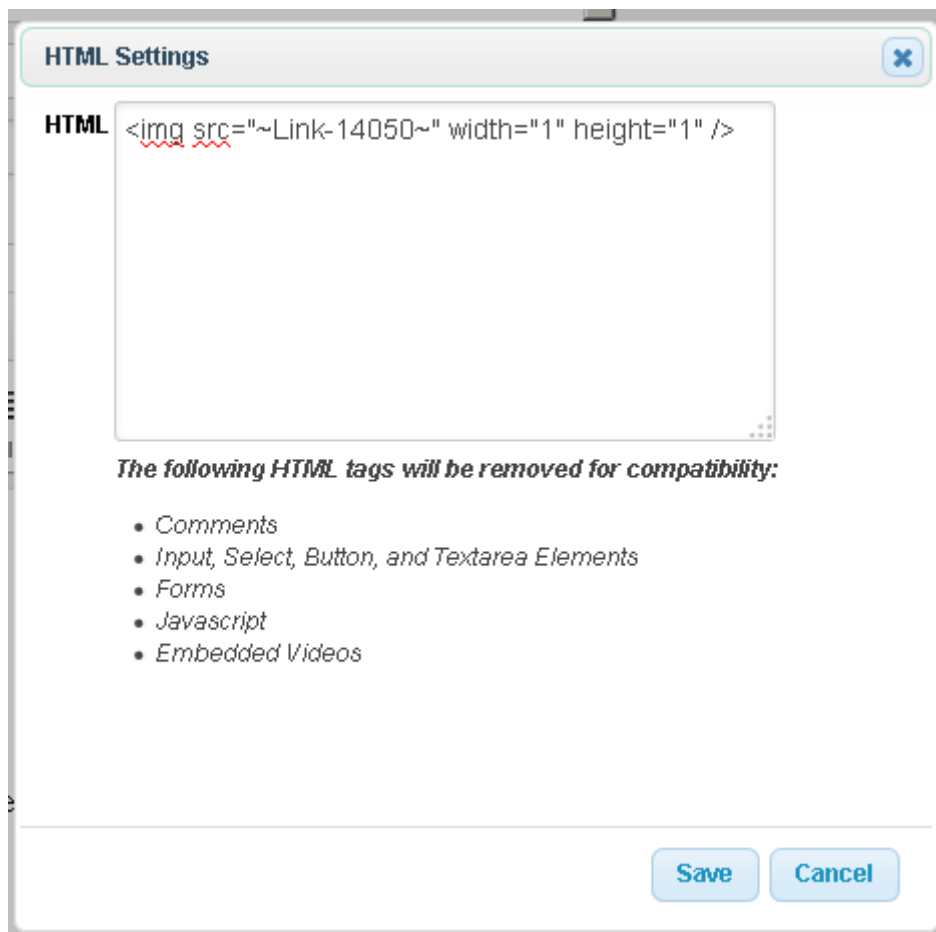
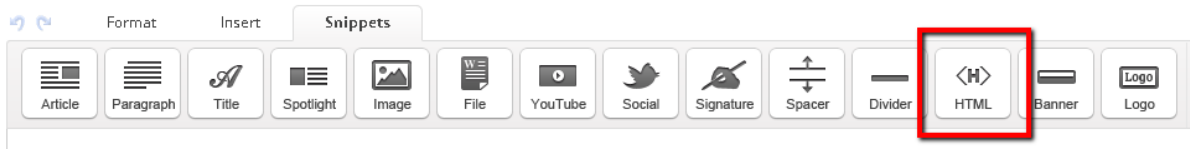
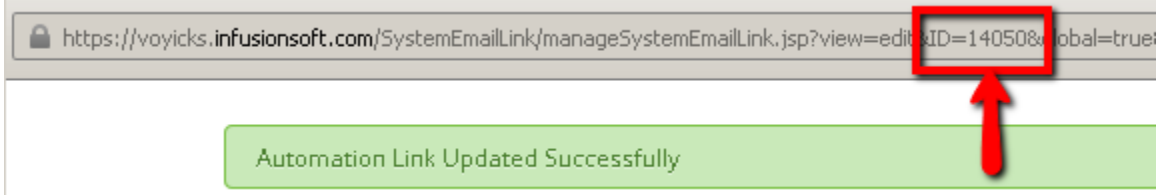
Edit x

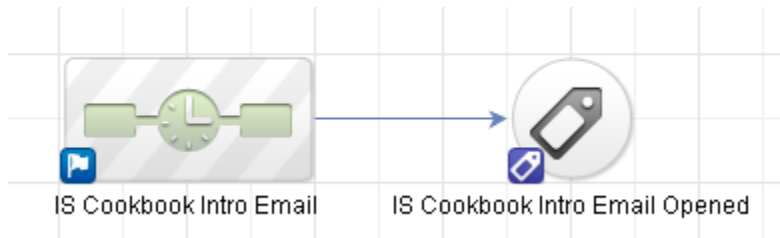
Add New Action

Save

Save & Close

Delete



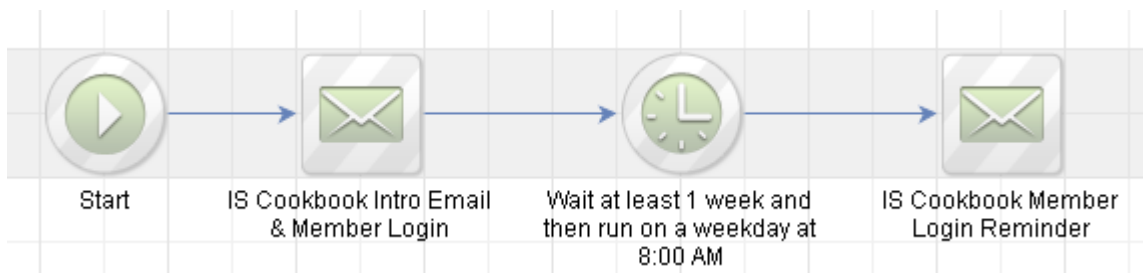


Configure Tag ×

This goal is achieved when any of these tags are applied:

Functional -> IS Cookbook Email Open Automation ×

Cancel Save



Subject: [SAVE THIS EMAIL] Infusionsoft Cookbook Login

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt

B *I* U ABC A ab

Link Paste Unlink



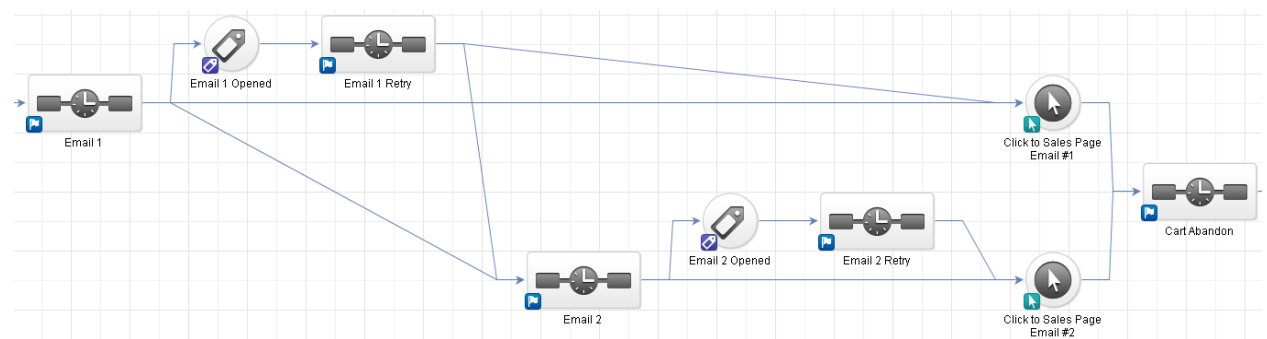
Hey ~Contact.FirstName~,

About a week ago you joined the Infusionsoft Cookbook community and I wanted to be 100% sure you had your login information.

Username: ~Contact.Username~

Password: ~Contact.Password~

[Log into the member's area now](#)



HTML Settings

```
HTML <script type="text/javascript">
var x=~Contact._Subscription2~'
if (x == 'No')
{var url = 'URL_FOR_NO_IN_SUBSCRIPTION2';}

else if (x=='Yes')
{var url =
'URL_FOR_YES_IN_SUBSCRIPTION2';}

else
{var url = 'DEFAULT_URL';}

var delay = 0;

setTimeout(function(){window.location.href = url;},
delay);
</script>
```

The following HTML tags will be removed for compatibility:

- Comments
- Input, Select, Button, and Textarea Elements
- Forms

```
if (x == 'No')
{var url = 'https://www.mywebsite.com/form-
thank-
you-no?inf_field_Email=~Contact.Email~';}
```

```
<link rel="stylesheet" type="text/css"
href="https://ajax.googleapis.com/ajax/libs
jqueryui/1.8.11/themes/base/jquery-ui.css" />
<style>
#ui-date-picker-div {
font-size: 12px;
}
</style>
<script src="https://ajax.googleapis.com
/ajax/libs/jqueryui/1.8.11/jquery-ui.min.js"
type="text/javascript">
</script>
<script>
jQuery(document).ready(function(){
jQuery("#nf_custom_AppointmentDate").css('widt
h', '100px');
jQuery("#nf_custom_AppointmentDate").datepicker();
});
</script>
```

Desired Appointment Date *



```
<script type="text/javascript"
src="https://ajax.googleapis.com/ajax/libs/jquery/1.8.1/jquery.js">
</script>
<script type="text/javascript">
$(document).ready(function(){
$("#content").hide();
$("#IMAGE").hide();
});
</script>
<script type="text/javascript">
$(document).ready(function(){
$("#show").click(function(){
$("#content").show(500);
$("#IMAGE").show(500);
});
});
</script>
<p align="center">Your sales Page</p>
<br>
<a align="center" href="#content" id="show">Cart Button</a>
```

Common Areas

Custom Header



```
$("#show").click(function(){
$("#content").show(500);
$("#IMAGE").show(500);
});
</script>
<p align="center">Your Sales Page</p>
<br>
<a align="center" href="#content" id="show">Cart Button</a>
```

Preview Save

Your Sales Page

Cart Button

[Cart Button](#)

Custom Tees

Products	Price	Quantity	Total
\$100 Block	\$100.00	<input type="text" value="1"/> Update	\$100.00
Subtotal			\$100.00

YOU MIGHT ALSO BE INTERESTED IN:

Scott's Product

```
HTML <style>
div.infusion-submit{ width: 110px; overflow:
hidden; }

div.infusion-submit button {
background-image: url(URL_FOR_IMAGE);
background-color: transparent;
background-repeat: no-repeat;
background-position: 0px 0px;
border: none;
cursor: pointer;
height: 50px;
padding-left: 110px;
vertical-align: middle; }
</style>
```

- 3-Radar (34)
- 3-Trades (58)
- ▼ CM (35)
 - 3-Radar (9)
 - EPS@GMAIL (32)
 - More ▾

Paul

Kathy Sokol

Hey Paul,

I get it, you get a lot of emails. Hopefully you are getting value from mine (maybe even looking forward to them). If not, I totally understand and respect your inbox.

[Click Here to Unsubscribe](#)

Have a great Tuesday,
Paul

Infusionsoft (Official)

www.infusionsoft.com

Sales & Marketing In C

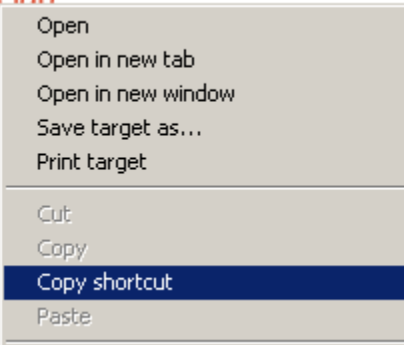
[Easy LifeCycle M](#)

Find Out How We

Mktg Easy for Sma

[Email Autorespor](#)

Map Out Marketing



infusionsoft.com - Infusionsoft® Power U In

Ad www.infusionsoft.com/

Sales & Marketing Solution Bo

Automate Lead Capture · Autor

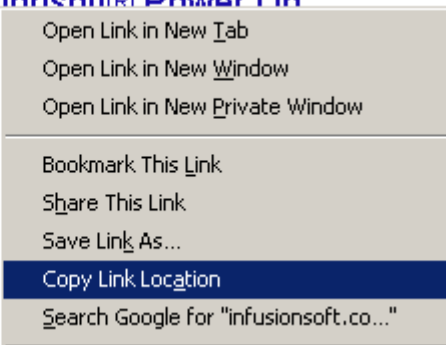
Better CRM Softwa

Get the Perfect Small Bus

Trusted by 24,000 Small B

Small Business Ma

Serving 24,000+ Small Bus



Infusionsoft® Power Up - infusionsoft.com

www.infusionsoft.com

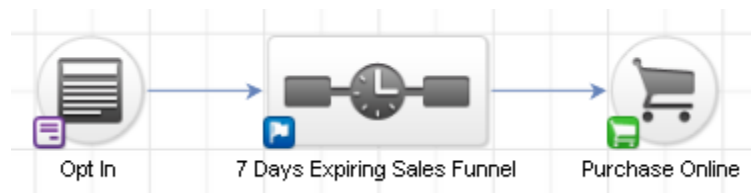
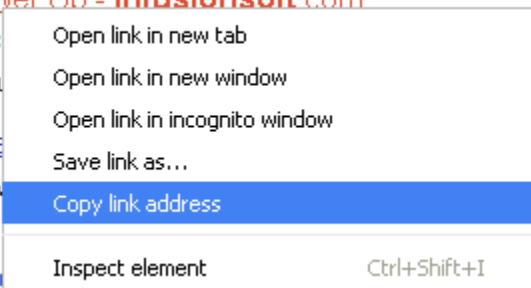
Sales & Marketing Solu

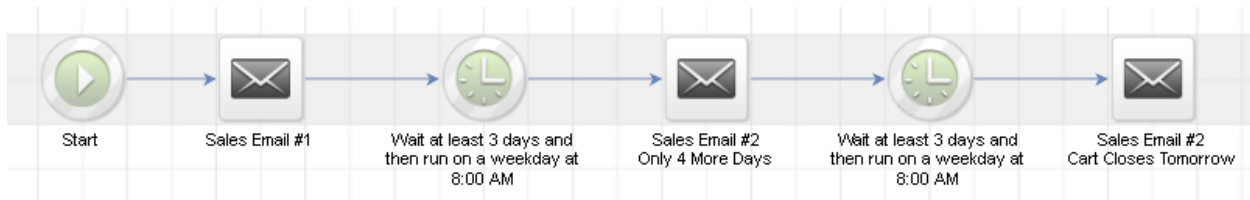
[Easy LifeCycle Ma](#)

Find Out How We M

Mktg Easy for Sma

[Email Autorespon](#)





Subject: Me

HTML Plain Text

Format Insert Snippets

Format Trebuchet MS 12pt Link Paste as Text

B *I* U ABC Link Unlink

Hey ~Contact.FirstName~,

I'm not sure if you knew, but I've got a product that can help someone like you who has the cookbook and wants to get the most out of it.

It's called "Automated Experience Design Fundamentals" and it covers the basic elements and philosophy of designing world-class automated experiences. This is the high level strategy stuff I couldn't cover in the cookbook.

This tome of delight is only printed as a hardbound and retails for \$57 in the US.

However, since you just opted in, I wanted to give you a special "fast action" bonus and offer it to you for half price. You can get your copy for only \$28.50!

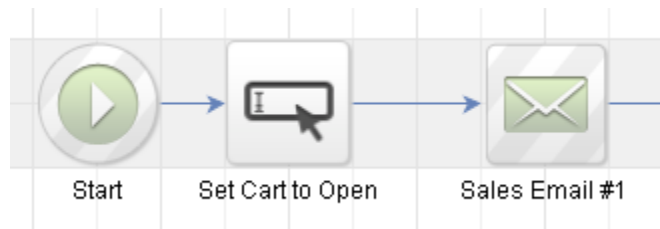
Act fast though, this offer is only good until next ~Date.DayOfWeek~ and then you are paying full price.

~Contact._CartURL~
Click Here to Order "Automated Experience Design Fundamentals"

Link Options ×

Link to: +

Insert/Update



Summary

This snippet allows you to automatically add information to a Contact's field or override the Contact's previous field value.

Field Value

Please select one ▼

- Latest Subject Line ▲
- 4 Day Cash Machine Cart URL
- Appointment Time
- Appointment Date
- Referring Email
- Referring Name
- Outstanding Hours
- Outstanding Balance
- Service Schedule Time
- Service Schedule Date
- Request Comments
- Consultation Time
- Consultation Date
- Previous Experience
- Qualifications
- Greatest Strength
- Greatest Weakness
- Goals
- Cart URL**
- sj_pass ▼

Summary

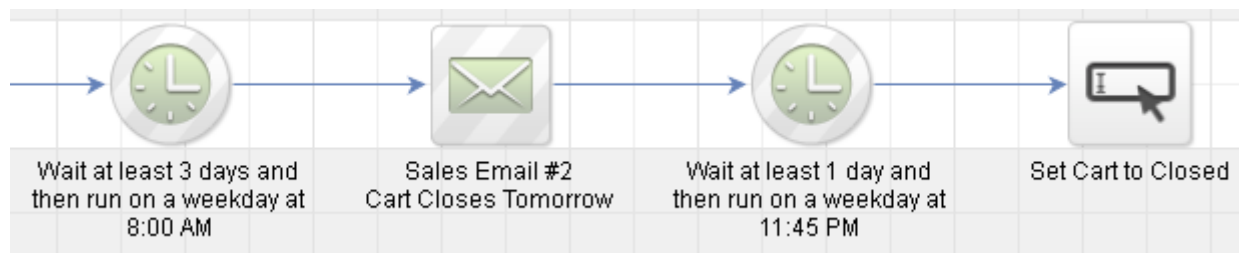
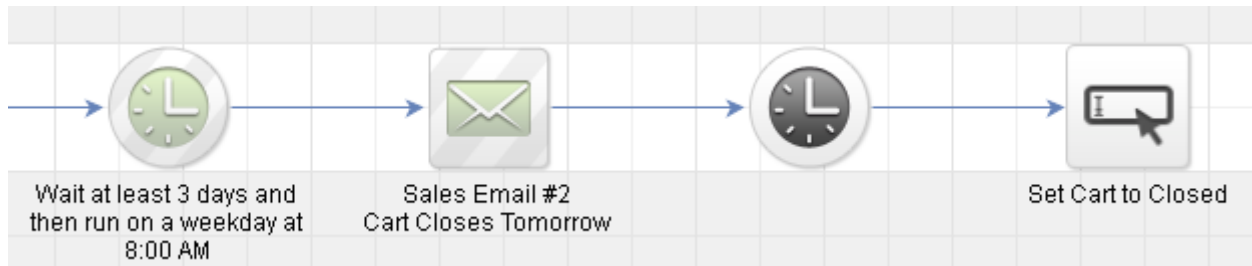
This snippet allows you to automatically add information to a Contact's field or override the Contact's previous field value.

Field Value

Cart URL

Cart URL

http://www.website.com/sales-page



Summary

This snippet allows you to automatically add information to a Contact's field or override the Contact's previous field value.

Field Value

Cart URL

Cart URL

http://www.website.com/cart-close