The 21 Point
App Audit
Checklist

Greg Jenkins,
Founder and Whatnot

Whether you decide to tackle this entire list in one sitting, or one a day for three weeks, this list will give you a good start for cleaning up your Infusionsoft application.

![Monkeypod Marketing logo]

Hey, thanks for grabbing this audit
check list.

I'm Greg. That's my face up there.
I've worked with hundreds of
Infusionsoft users in a handful of
roles.

The tips and suggestions you're
about to read have been compiled
by me, over multiple years as an
Infusionsoft consultant, and live
trainer.

Greg Jenkins,
Founder

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It's really easy for stuff to pile up in Infusionsoft. So it's important to stay on top of it as best you can.

I've also seen this check list used for when people are clearing out old data to use an app for a new company. Or to run multiple companies.

Keeping a clean Infusionsoft application can be a challenge. Things have a tendency to accumulate if you don't take the time to do an occasional audit. The following checklist is a great place to start if you're looking to freshen up your application.

NOTE:

It's worth mentioning that because each application is used in a different way, the recommendations I'm going to make can vary from business to business.

Consider all the possible repercussions before deleting anything. If you're uncertain, then don't press delete. Sometimes Infusionsoft's support team can restore data, but I wouldn't count on it.

1

CHECK USER CONTACT INFO

As new users get added it's important to check and make sure that their physical address is accurate.

Do you have multiple offices? Does each user's profile have the correct details about their location?

This is important because the contact owner merge fields draw from these user values.

2

CHECK COMPANY ADDRESS

If your company moves you probably have dozens of places that you need to update that information.

It's really easy to overlook a few of them in Infusionsoft.

Check out this video for a detailed explanation of the various address fields in Infusionsoft.

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CHECK EMAIL ADDRESS BLOCK

The address block is required for CAN-Spam compliance, and was outlined in check point number two, but because it also appears in the footer of all of your emails, you may want to use different address here than elsewhere.

For example, if you work from home, you may not want your home address listed in all of your emails, so you may use a UPS box or similar. (Sorry, no USPS PO Boxes)

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REVIEW TEMPLATES

Templates are basically drafts of your emails, but they can also be used for legacy notes and tasks.

If you are using any of these, you'll want to check this section thoroughly and see what elements are outdated, or are no longer necessary.

Pro-tip: You can draw emails from the templates section into the campaign builder if need be.

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UPDATE TEMPLATE CATEGORIES

If you update or change your template categories you'll want to make sure this list is current.

Here's an article demonstrating how this works.

Categorizing your templates makes it easier to find them when you need them for action sets or billing automation triggers.

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REVIEW TAGS

This can be a massive project on it's own. But it's also one of the most critical pieces of the audit.

There is no limit to how many tags your application can have. But if you have redundant tags, or tags that don't carry meaningful data. Consider removing those.

Here are some tagging best practices. And another one.

Pro-tip: Add descriptions to your tags.

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REVIEW TAG CATEGORIES

Tags are organized by categories. And the categories are something you can configure and refine over time.

Functionally the category doesn't impact the way the tag works, but it can help carry additional information if you use it appropriately.

You can also add a description to the category. It'll help future users understand why that category was created.

I want to deviate from the check-points in this audit to drive home the importance of cleaning your tags.

This single item can help speed up a slow application significantly.

Tags are tracked by ID number, so renaming your tags or categories won't impact their functionality at all.

Because applying tags can trigger automation, make sure you know where or if a tag is being used before deleting it.

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ADDRESS DUPLICATE CONTACTS

Duplicate contacts can happen in a few ways. But whether they got in though a web form, an import, or a purchase, you want to make sure you periodically check for them and resolve it.

Having duplicate records can cause confusion, and makes it easy to send the wrong message to the wrong people.

Once you've identified duplicates, you can merge them individually or en masse.

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REMOVE UNECESSARY TEST CONTACTS

In addition to checking for duplicate contacts, you'll want to comb through your database to identify test contacts you've created. Usually these happen when you're testing web forms and landing pages. They don't do any harm for your application, but can pile up if you don't clear them out occasionally.

Pro-Tip: Develop a naming convention to help identify them easily in the future.

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AUDIT CUSTOM FIELDS

Yes, applications only have 100 custom fields per type of record.

But if you use these judiciously that is usually more than enough. It's important to revisit your custom fields and decide which you are actually using, and if there are any that could be condensed..

Also, consider what should be a custom field and what might be best as a tag.

Here's an article by my Mom's favorite author.

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CHECK FOR ERRONEOUS SAVED SEARCHES AND REPORTS

Saved searches and reports are easy to create. But once you stop needing that information it's equally easy to forget to delete it.

If you aren't careful, your list of saved searches can snowball, and you end up with an unwieldy amount that can inhibit productivity.

To delete, navigate to the search, and click on the options dropdown.

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UPDATE BRANDING CENTER DEFAULTS

It's easy to forget to update your branding center defaults as your logo or brand colors change.

Having defaults in your branding center that are nearly functional for your web forms, emails, and landing pages can save you a lot of time and energy as you build new marketing collateral.

If you haven't kept your branding center defaults current you are wasting time with every single email you build.

🖌 Branding Center

Emails

Campaign Email   Edit

Broadcast Email   Edit

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REMOVE UNNECESSARY DASHBOARD WIDGETS

Your dashboard is prime real estate. You should reserve that space for only the information you need and use most regularly. Delete obsolete items, like stats from old campaigns.

Additionally, your dashboard will load more quickly with fewer widgets.

Pro-tip: If you have searches and reports you need only occasionally, consider adding them to your favorites instead.

Little Box o' Stats   Rename

Blog Subscribers THIS WEEK	3
Blog Subscribers LAST WEEK	3
Monkeypod Blog Subscribers	543
New Contacts Today	3
New Contacts This Month	29
New Contacts This Year	401

Add Another Stat

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CLEAN-UP AND RENAME COMPANY FILES AND IMAGES

When you upload images to Infusionsoft, very few people take the time to give it a naming convention that will be helpful 6 months down the road.

Once in a while go back and delete outdated items and images, and update your names so that you can find what you need more quickly.

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DELETE TEST PRODUCTS

If you are following a training video, or just practicing, it can be useful to create a test product just to try things out.

But long term, this product shows up on reports, as well as in search criteria. Once you're done using it, delete it.

Pro-tip: To delete a test product that has been sold, first delete the payment, then the order record, then the product. If you need help configuring your products, check out the E-Commerce Pod course.

▣ Manage Product

Product Information	Subscription Plans	Product Image

Product Name: Pineapple

Product Type: Product ▾

Short Description: This is rather spiky, yet delicious.

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

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MARK DISCONTINUED PRODUCTS AS INACTIVE

If you have products you are no longer selling, but have sold in the past – do not delete them. There is data and reporting associated with those products.

Instead, mark the product as inactive so it cannot be sold, and so that you can exclude it from future reports.

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REMOVE EXTRA ORDER FORMS

You can keep your order forms if you want, but I recommend deleting old ones.

Order forms are simply a sales page where you're choosing what you are selling. But because they're easy to throw together, often times they're used for launches, or time sensitive offers.

Consider deleting them once you're done with that promotion. (Or removing the product and adding a "Sorry, cart closed" message)

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EXTRA MERCHANT ACCOUNTS

If you have switched merchant accounts, or if you're updating your application to run a new business, consider removing old or unused merchant gateway connections.

This will ensure that you don't accidentally process a payment through an outdated or errant gateway. Action sets, order forms, and the shopping cart all allow you to select a merchant gateway and it can be easy to forget to update it somewhere.

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REFERRAL PARTNER LINKS, RESOURCES AND COMMISSION PROGRAMS

If you are using the Referral Partner part of the application, it'll be worth checking which old links you may no longer need.

You'll also want to identify which resources, such as email copy for an event that has passed, can be deleted.

And finally if you have an commission programs you've discontinued, that can be safely deleted.

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DELETE UNUSED OR UNNECESSARY CAMPAIGNS

If you've run a campaign and there is data associated with it then you probably don't want to delete it.

But if you've started to build something, and changed your mind, or never ended up using it, consider deleting it. Start by searching for campaigns that have never been published.

Pro-tip: The campaign elements from these unused campaigns can make your campaign reports harder to use

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RENAME CAMPAIGNS WITH A CONSISTENT NAMING CONVENTION

If you decide that deleting campaigns isn't the best idea, you can rename the ones you aren't using to give an indication that they're retired.

Additionally, it's a good idea to have a naming convention for your campaigns to help with general internal organization.

Pro-tip: Department initials or internal acronyms are a good way to start.

It is entirely possible that you might read through this and still decide to hire someone to do this type of stuff for you. That's fine.

But if you wanted to tackle it yourself, I wanted you to have a starting place.

If you have questions about the instructions outlined in this document, or about finding someone to hire, I'm happy to help however I can. You can reach me on twitter, or via email.

ABOUT THE AUTHOR

Greg is the founder of Monkeypod Marketing. He's an experienced speaker, trainer, and marketing automation expert.

Greg's love affair with small business started in Lansing, Michigan, where Greg owned and operated a business installing and servicing draft beer dispense systems.

After moving to Arizona, he spent three years helping Small Businesses grow while advancing through several roles at Infusionsoft. At Infusionsoft he began as a consultant, working one-on-one with hundreds of small businesses before moving into a live-training role, where he was able to travel the world teaching small business marketing automation strategies as the lead trainer, and ultimately the curriculum developer for Infusionsoft's most popular education event, Infusionsoft University. The concept of Monkeypod Marketing was born out of Greg's insatiable desire to find new ways to elevate the small business community.

Greg's passion for entrepreneurship is matched only by his extensive knowledge of ales, lagers, and all things craft beer. In his free time he enjoys disc golf, hiking, traveling and playing water polo.

Feel free to connect with Greg on LinkedIn, Facebook, or Twitter.

I'd love to hear how your first application audit goes.

Good luck !

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