

How to Use the Customer Service Internal Form in Infusionsoft

1. Begin by locating the customer's contact record in Infusionsoft. If a customer has more than one contact record, first merge the contacts (see, "How to Merge Contacts in Infusionsoft").
2. Scroll down to the "Form Submissions" area, and find the "Internal Forms..." drop down on the right.

Form Submissions Internal Forms... ▼ Fill Out

Date	Form	Submitted By	Referring URL
9/7/2018	 Manifesting Worksho...	System	https://manifestingacademy.com/manifesting-workshop

3. Click **Internal Forms...** select, **Customer Service Access Forms**, and click **Fill Out**.

Customer Service Access ▼ Fill Out

4. Tick off which products/memberships the customer should have access to, and click **Save**.

Complete Form ×

Sarah Prout.

Add Contact to (temp post 10/2018)...

- Ancient Manifesting Ritual Only (temp post 10/2018)
- Manifesting Course Welcome Email (temp post 10/2018)
- Miracle of Decluttering (temp post 10/2018)
- AIM books (temp post 10/2018)
- Manifesting Academy Membership

First Name *

Email *

Save