August update 2018 | Keap

Last Modified on 02/15/2019 9:46 am MST

Invoicing

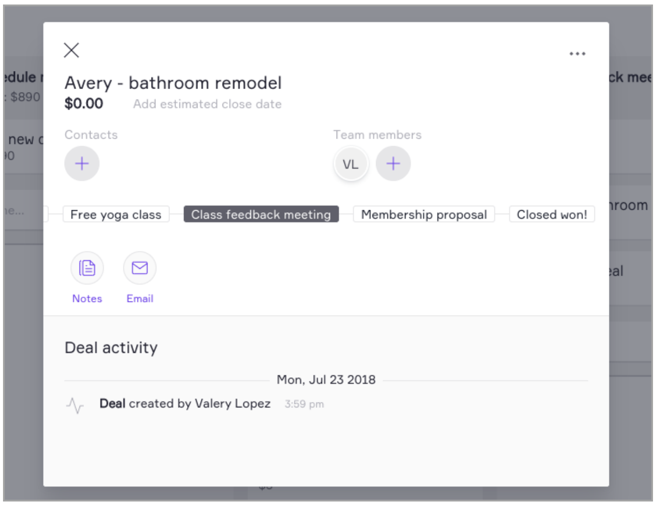
Send professional invoices and track their status in one central location. Automatically send a follow up email once the customer pays an invoice. For detailed instructions, click here .

Enriched contact email

Send customized emails directly from your contact record. Add attachments, sign off with your personalized signature, and use the rich text editor to format the email. click here for more information.

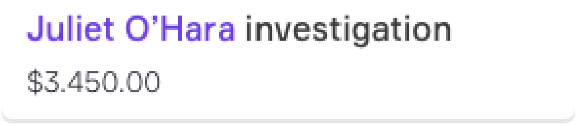
Updated card view in sales pipeline

When in the sales pipeline this is the **CURRENT** card view after card creation:



This is how the **NEW** card will display after card creation:

If the contact is an existing contact - name will display in purple, followed by the title:



The card will no longer display the "Time in stage" or the team member initials.

Invoices: How to personalize your email message

Customize your invoicing emails. Add a personal touch to the email that's sent when you invoice your customer. For more information, **click here**

Contact type Field & associated Lists

Sort your contacts into Contact Type lists so you can easily find the right ones at a later time. Use the drop-down field on the contact record to label the contact a "Lead," "Customer," or "Other" and see your lists appear on your Contacts page. For more information, **click here**