June updates 2019 | Keap ⚲

This article applies to:

Plan for successful appointments with buffer time

Get the additional space you need with Appointments buffer time. Travel to and from locations, and gain some much-needed planning and wrap-up time with 15-, 30-, and 45-minute increments. No more risk of overlap! Learn more.

Keap Mobile iOS

Never miss a beat with Keap mobile additions.

Whether it's searching for contacts by their associated company name, effortlessly sharing your details with a new contact, or capturing new contacts as they come, Keap mobile is making constant improvements to keep you on top of your game. Download the app here. *Only available for iOS

Recurring payments: Get paid on time, every time

Say goodbye to the hassle of remembering to bill your clients.

You can now set up recurring payments, determine payment frequency, add custom start and end dates, and pause payments when necessary. Learn more.
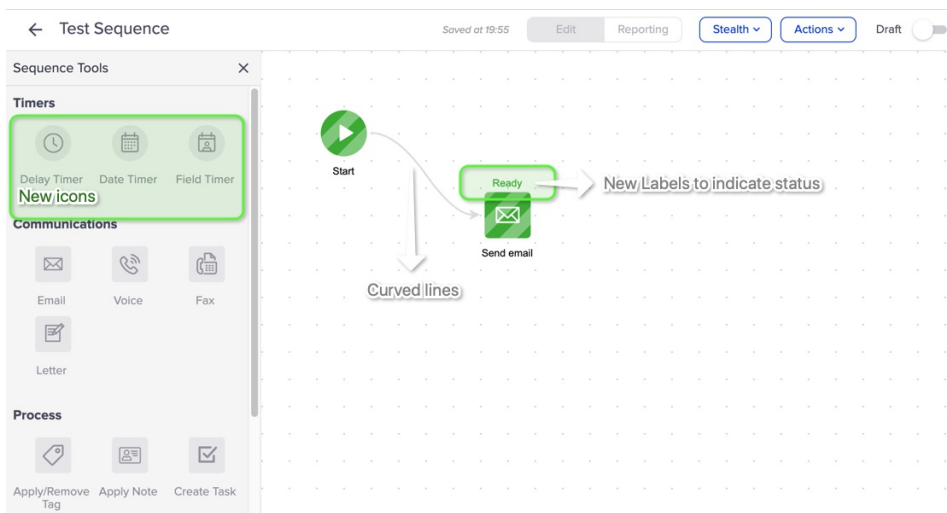
Keap default user roles

Introducing "Staff" as a role in user permissions.

Empower your team with the Staff role in user permissions. They'll have access only to their own contacts, tasks, and deals. Find it in Settings. Learn more.

Campaign Builder has a fresh new look

Building and launching campaigns just got easier!

The updated look and feel makes everything easier to navigate. We've also added indicators to alert you if your campaign is ready to launch or still requires setup.

New Campaign Builder sequence: Create order

The "create order" sequence automates the order-to-invoice process, enabling you to integrate yet another aspect of your business. You can add products, set up payment options, and preview and edit the invoice before it sends. Learn more.

Accomplish more with bulk actions for tags

Not only can you now perform quick, bulk actions with your tags, but there's a clean new look on the tag management page. Quickly add, delete, send a broadcast, or export your tags. Access it from Settings. Learn more.

New integration: Connect your Quickbooks Online

Integrating your business tools just got easier with Quickbooks Online import. Once you connect, any new Quickbooks Online contacts will automatically be tagged and added to Keap. Learn more.

Work smarter with Pipeline Automation: Add a Task

Create and assign new tasks when you move deals into or out of a stage in the Pipeline. Admin and Limited Admin roles can access and configure this feature directly from Pipeline. Learn more.

Work smarter with Pipeline automation: Add and remove Tags

You can automate key steps within your Pipeline process. Keep your leads moving by configuring specific automations, triggered when a new lead enters or exits a stage. Learn more.

Get the right data from the start with Smart Forms

No two businesses are alike. With Smart Forms, you can add fields that are specific to your business process, allowing you to capture all the essential details when adding a new contact. Design your form with the right fields for accuracy and efficiency. Learn more.

Introducing Messages: Text right from your desktop

Staying connected is easy with Messages. Enjoy the same features available in the Keap mobile app (contact card, appointment links, etc.) from your desktop. NOTE: You'll need to claim your Keap Business Line first. Learn more.

Quickly add new appointments for your contacts

Already know the date and time your contact wants to meet? With "book now" you can instantly create and confirm new appointments. Access it from any contact card. Learn more.

Mobile app features are expanding with Keap Grow

If you're a Keap Grow user, manage your contacts with stages in the Keap Mobile iOS app. Know exactly where your contacts are in your business and sales lifecycle. All in an effort to help you manage your business while on the go. Learn more.