August updates 2019 | Keap %

This article applies to:

Content Risk Updates (Broadcast email spam checking)

Infusionsoft now displays any risky content issues in your emails prior to sending a broadcast. If our system deems your email too risky, you will not be able to send it until the offending content is removed. Learn more .

Appointments update: Book up until 3 years

The future is now when it comes to Appointments! Whether planning for an event in the future or simply planning ahead for your clients, you can now schedule appointments 3 years in advance. Learn more .

New Pipeline automation: Send an email

Communication is key when it comes to keeping your contacts moving. Now you can configure emails to send when moving a deal into or out of a stage. Keep it personal with merge fields, too. Learn more .

New Campaign Builder Goal: Failed Purchase

Take control when a transaction fails with the new Campaign Builder Goal: Failed Purchase. Configure automation to run based on a variety of product and payment options — more successful purchases with a greater sense of confidence. Learn more .

Pipeline Automation: Merge fields in Tasks

Get the context you need with Pipeline automation task merge fields. Configure your tasks to pull in contact-associated data, giving you essential details that help you get right to work. Learn more .

Keap Mobile 1.8 Updates

We're excited to bring you some key enhancements to your Keap Business Line.

- **Voicemail & Voicemail Transcription:** Access your Keap Business Line voicemails through the Keap Mobile app and take advantage of voicemail transcriptions, enabling quick scanning for important details. Learn more .
- **Caller ID:** Whether you're tracking an important lead or just want to be available for your clients, you can now see who's calling your Business Line every time. Learn more .

Messages update: Text images and contact info

Desktop text messaging just got better with two new additions. You can now share your contact information with one click . You can also attach images to your desktop text messages. Open a new text message to access these options.

New integration: Import contacts with Microsoft

Save time and get organized with Microsoft (Office365 or Outlook.com) contact import. From your contact list, decide who you want to import and quickly organize them into lists. Learn more .

Appointments updates

- Keep your leads and clients engaged with website booking links. Easily copy and paste a short code snippet to your website and allow visitors to quickly book your time. Learn More .
- You can now add pre-meeting instructions so that your prospects/clients know an agenda before your meeting. Learn more.
- Gearing up for a lengthy appointment? Whereas appointment times were once limited, you can now schedule appointments for custom durations (up to 12 hours). Access this option in your "appointment type" settings. Learn more.
- Decide how you want to appear to your contacts. You can now select if you wish to display your name or your business name in all Appointment booking links. Learn more .
- Create an appointment directly from the calendar. Learn more .

Smart Forms Updates

- You can now use smart forms in the campaign builder to automate processes. Learn More .
- Smart forms can now be accessed directly from the contact record so that you can update an existing contact with a smart form. Learn More .
- Help text is now available in Smart Forms. You can now Include additional details to add clarity for Smart Forms users when creating your Smart Form, helping them enter the right information every time. You can also choose to hide or display your help text. Learn more .

New Campaign Builder Goal: Smart Forms

Kickstart your automations after completing form fields in Smart Forms. You can tie different automations to each of your forms, and add logic to a variety of different scenarios. Just drag the Smart Form goal onto the CB canvas to begin. Learn more .

Keap Mobile 1.9 Updates

- Custom voicemail greetings. Learn More .
- Mobile Business Line: Block unwanted callers. Learn More .
- Keap Mobile Quick Actions.Learn More .