

New reports for Keap[®]

This article applies to:

With additional reports for Keap, you can grow your sales without having to sift through data and spreadsheets. We've added 7 new sales reports to Keap so that you can track everything from total sales and payments, itemized product reports, receivables and failed invoices.

Each of these reports can be accessed by navigating to the **Reports** page in Keap Pro or Max.

All sales report

The All Sales Report helps you see what and how much you are selling with robust search criteria, including Tags and Products.

You can use it to create a customized sales summary report.

All sales (itemized) report

The All Sales (Itemized) Report gives a more detailed sales breakdown, including information like product, shipping, discounts, finance charges, and more.

You might use this report to analyze the percentage of sales with discounts or pay plans.

Payments report

The Payments Report enables you to find specific transactions based on criteria you choose or can be used to view a list of all your transactions for a given period.

Receivables

The Receivables report shows you a detailed list of orders with a balance due. It is intended to help you keep an eye on your cash flow. The report searches all invoices that have a payment plan including those with unpaid invoices.

Sales totals by product

This report will help you identify your top selling products by month. The results will show the number of orders per product, the total number of individual products ordered, the amount sold

Failed invoices

The Failed Invoice Report displays all failed auto charge transactions for subscription programs and payment plan installments. It only lists the charges processed through a merchant account linked. You can use this report to personally contact customers to resolve credit card issues, to manually initiate a billing Follow-Up Sequence (if you are not using Purchase and Billing Automation), or to investigate potential issues with

your merchant account. You are able to filter this report by invoice total, balance due, date range, product, and more.

Email batch results

This report displays information about all sent emails, including bounced emails.
