

My Day in Keap Ultimate

Last modified on: 03/10/2025 2:56 pm MST

Tags: Keap-Ultimate

Overview

We are updating the 'My Day' feature in Keap Ultimate to incorporate enhancements to Appointments and Tasks, previously available in Pro and Max. The previous My Day page is still accessible from the My Day Nav.

Key Changes

1. Tasks in My Day

- a. Tasks are now displayed in a dedicated 'Tasks' view.
- b. Users can filter tasks by assigned user.
- c. Users can toggle between showing and hiding completed tasks.
- d. Users can quickly add new tasks.

2. Appointments in My Day

- a. Keap's Appointment functionality is now available in Ultimate! [Learn more here](#)
- b. Enables syncing with your Google or Outlook Calendar.
- c. Enables booking functionality, allowing others to schedule appointments with them via booking links.
- d. New automations based on appointment scheduling, cancellations, etc., are now available.
- e. Clicking the '+' button to add an appointment now directs to the new Appointments interface.
- f. Setup for Appointments, including integration/sync, appointment bookings, etc., can be found [here](#), with key articles highlighted below:
 - i. [Appointments - All](#)
 - ii. [Appointments Overview](#)
 - iii. [Integration - Outlook Calendar](#)
 - iv. [Integration - Google Calendar](#)
 - v. [Integration - Zoom](#)
 - vi. [Appointment Bookings](#)
 - vii. [Appointment Managers \(multi-user appointment management\)](#)
 - viii. [Appointment Automation](#)

3. Legacy Features

- a. To access the old 'My Day' view, click 'Legacy Features' in the My Day subnav.
- b. Options to return to the Classic 'My Day' page and access opportunities are available in Legacy Features.
- c. Access to Legacy forms is also located in Legacy Features.

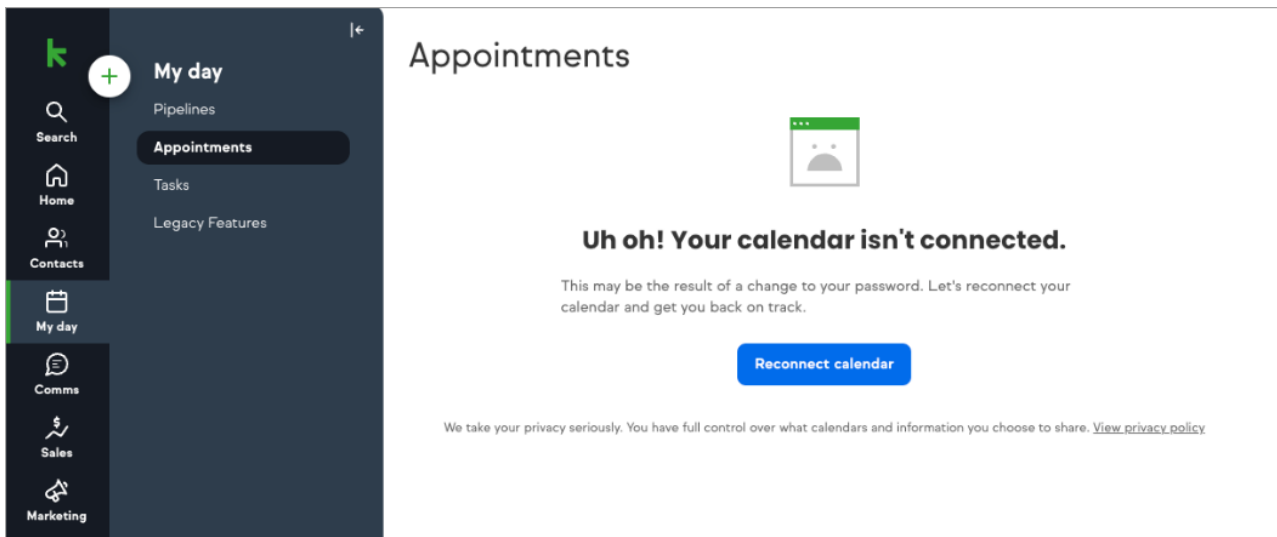
4. Integration details

- a. The new Appointment functionality requires synchronization with a Google or Outlook calendar account.
- b. Zoom integration is optional for use with meeting invites.

5. Known Gaps

- a. Appointments created using the new feature will not appear when viewing a contact record. Only Classic appointments will display. This will be resolved in future updates.
- b. Appointments can be viewed from the Calendar on My Day, and history will display after the Contact record update is complete.

Need to set up your integration:



New Appointments view in My Day:

[illegible]

New Tasks view in My Day:





Search



Home



Contacts



My day



Comms



Sales



My day

Pipelines

Appointments

Tasks

Legacy Features

Tasks

Filter by:

Jeremiah Weise

Past due

☐

Validate needs 8 Feb 2024 (a year ago)
Contact: [Jeremiah Weise](#)

☐

Send quote 8 Feb 2024 (a year ago)
Contact: [Jeremiah Weise](#)

☐

Identify subcontractors 8 Feb 2024 (a year ago)
Contact: [Jeremiah Weise](#)

☐

Create Quote 8 Feb 2024 (a year ago)
Contact: [Jeremiah Weise](#)