

Contact record updates

Last modified on: 04/23/2025 8:21 am MST

Overview

We've enhanced the contact record to provide you with more comprehensive information and streamlined workflows. These updates address common challenges and significantly improve your experience when managing contacts. There's a few problems/outcomes we focused on with these updates in particular:

Limited Visibility: Users previously struggled to quickly see a complete picture of activity within a contact record.

- Improve available information visible in the contact activity history:
 - Detailed tag information, including when tags were removed
 - Contact Score changes
 - Form submissions
- Keep important/evergreen notes from being buried.

Take or document actions on a contact Taking and recording certain essential actions on a contact was cumbersome.

- Tasks and Notes can now store additional information
- Tasks, Notes, and Forms can now be added from their contact panel while still viewing information about the contact
- Previously submitted forms now allow me to view what values were submitted.

Why these items in particular? We want users to be better informed and work faster when viewing contact records, and Tags, Notes, Tasks, and Forms are all individually heavily used, representing 10-21% of all contact record visits.

Feature Enhancements

Notes Panel

- **Inline add notes:** Note popup modals have been removed, so you can quickly add a note while still viewing information in the contact card and activity history.

The screenshot displays the Keap contact record interface. On the left, a contact card for Jeremiah Weise is shown, including his profile picture, name, title (Janitor), company (Thryv), phone number (8182146824), and email (jeremiah.weise@keap.com). Below the card are icons for Text, Email, Tag, Note, Task, and More. The main area on the right is the 'Notes' panel, which has a title bar with a back arrow, 'Notes', and a plus icon. The panel contains several input fields: 'Title', 'Add a note*' (with a red asterisk), 'Assigned to' (a dropdown menu), 'Use note template' (a dropdown menu), and 'Note type' (a dropdown menu currently set to 'Other'). There is also a checkbox for 'Pin this note to the top'. At the bottom of the panel are buttons for 'Save note', 'Less ^', and 'Cancel'. The background shows a 'Contact activity' section with a list of activities and a 'Contact' tab selected.

- **New note fields:** New note fields are now optionally available for use when creating or updating a note, including a note subject, created and updated timestamps, assigned user
- **Pin important notes!** Users can now pin important notes so that regardless of how old or recent

they are, they stay above the fold. Multiple notes can be pinned.

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Lead Client Other

Info

Jeremiah Weise

Janitor
Thryv

8182146824

jeremiah.weise@keap.com

Text

Email

Tag

Note

Task

More

Notes

Search notes

Pinned

Koi Pond

Jeremiah is looking for a koi pond install in addition to hardscaping throughout the rear of property

Oct 8 2024

Note

Blinky Blinky Note

Tasks Panel

Tasks can now be created, and viewed within the Task sidebar, enabling you to create and view tasks without losing visibility of information in the contact card and activity history.

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Lead Client Other

Info

Jeremiah Weise

Janitor
Thryv

8182146824

jeremiah.weise@keap.com

Text

Email

Tag

Note

Task

More

Contact activity

Sales

Tasks

Jeremiah Weise

Task title

Follow up regarding spilled 70mm film canisters

Description

We need to determine if this is toxic, salvageable, etc.

Due date

April 18, 2025

Due time

8:30 PM

Reminder

15 min before

Assigned to

Jeremiah Weise (jeremiah.weise@keapptest1.com)

Save

Cancel

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Lead Client Other

Info

Jeremiah Weise

Janitor
Thryv

8182146824

jeremiah.weise@keap.com

Text

Email

Tag

Note

Task

More

Contact activity

Sales

Due: Feb 22, 2024

\$32,000, Invoice #2713

Overdue

+7 more quotes or invoices

Tasks

Jeremiah Weise

Edit

Follow up regarding spilled 70mm film canisters

We need to determine if this is toxic, salvageable, etc.

Due on

Friday, April 18, 2025 8:35 PM

Reminder

15 min before

Associated contact

Jeremiah Weise

Assigned to

Jeremiah Weise

Created

Thursday, April 17, 2025 8:36 PM

Last updated

Wednesday, December 31, 1969 5:00 PM

Mark as complete

Forms Panel & Activity History

Internal forms can now be completed within the new Contact Forms panel, enabling you to fill out and view forms without losing visibility of information in the contact card and activity history.

The screenshot displays the Keap interface for a contact named Jeremiah Weise. The contact card on the left shows his profile picture, name, title (Janitor), company (Thryv), phone number (8182146824), and email (jeremiah.weise@keap.com). Below the card are icons for Text, Email, Tag, Note, Task, and More. The right sidebar contains three panels: 'Form submissions' showing a submission for 'anniversary date' on April 8, 2025, with a dropdown menu for selecting forms; 'Facility Info' with fields for First name, Last name, and Email address, and a note about the facility's size; and 'Contact activity' showing a sales record with a due date of Feb 22, 2024, and a status of 'Overdue'.

Contact Card:

- Name: Jeremiah Weise
- Title: Janitor
- Company: Thryv
- Phone: 8182146824
- Email: jeremiah.weise@keap.com
- Actions: Text, Email, Tag, Note, Task, More

Form submissions:

- Form: anniversary date
- Submitted by: Jeremiah Weise
- Date: Apr 8, 2025
- Dropdown menu: Fill out an Internal form (anniversary date, CUS11375 internal form, deal creation, Facility Info, testing)
- Link: Manage forms

Facility Info:

- First name: Jeremiah
- Last name: Weise
- Email address: jeremiah.weise@keap.com
- Note: This facility is simply massive, you have to see it to believe it! 75k sq/ft!

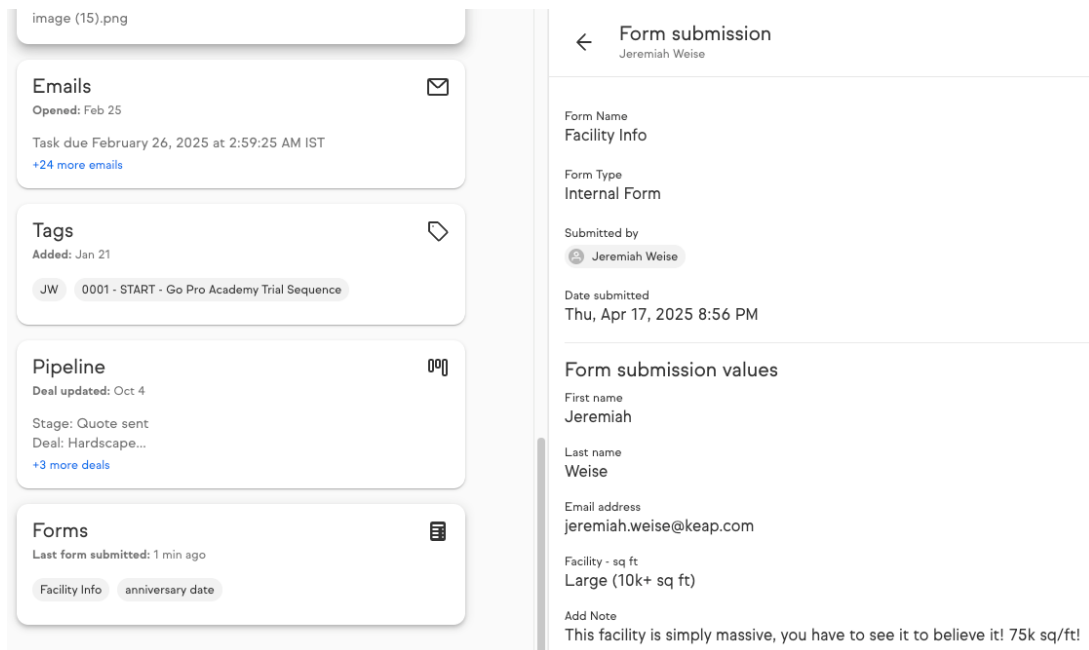
Contact activity:

- Activity: Sales
- Due: Feb 22, 2024
- Amount: \$32,000, Invoice #2713
- Status: Overdue
- Link: +7 more quotes or invoices

Facility - sq ft:

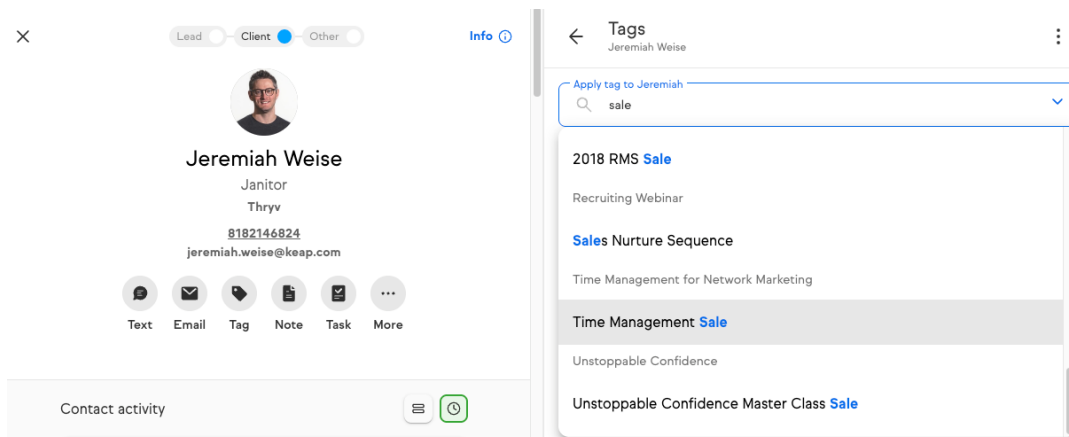
- Small (2.5k-5k sq ft)
- Medium (5k-10k sq ft)
- Large (10k+ sq ft)
- Update contact

Additionally, previously completed forms are now visible from the contact record in both the activity history and from the Forms panel. This allows users to see not just that a form was submitted, but what information was captured in that submission.



Tags Panel & Activity History

Quickly apply tags inline from within the Contact Tag panel - just begin typing the name of the tag you wish to add, then click Apply tag!



Importantly, the Tag panel now displays the currently applied tags as well as a history of both tag application and removal.

Lead Client Other Info

Jeremiah Weise
Janitor
Thryv
8182146824
jeremiah.weise@keap.com

Text Email Tag Note Task More

Tags
Jeremiah Weise

Apply tag to Jeremiah

Apply tag

Currently Applied History

Jeremiah Tags
JW
Tag applied Jan 21, 2025

0000 - Functional & Admin
0001 - START - Go Pro Academy Trial Sequence
Tag applied 21 Feb 2024

To view the history of previously applied or removed tags, simply click the History section, and make sure that you are filtering for either Tags applied, Tags removed, or both.

Lead Client Other Info

Jeremiah Weise
Janitor
Thryv
8182146824
jeremiah.weise@keap.com

Text Email Tag Note Task More

Contact activity

Today

Note created by System
This facility is simply massive, you have to see it to believe it! 75k sq/ft!
8:56 PM

Tags
Jeremiah Weise

Apply tag to Jeremiah

Apply tag

Currently Applied History

Search tags applied to Jeremiah

Jan 21, 2025

Jeremiah
Tag removed Jan 21, 2025

JW
Tag applied Jan 21, 2025

Jan 14, 2025

Jeremiah
Tag applied Jan 14, 2025

Tags applied
Tags removed

Clicking on a tag will provide more detailed information about it's status on the contact

Lead Client Other Info

Jeremiah Weise
Janitor
Thryv
8182146824
jeremiah.weise@keap.com

Text Email Tag Note Task More

Contact activity

Today

Note created by System
8:56 PM

Tag applied details
Jeremiah Weise

Tag name
JW

Description
No description

Tag category
Jeremiah Tags

Tag usage
This tag is applied to 1 contact and is used by 0 automations

Tag applied on
Tuesday, January 21, 2025 11:59 AM

Applied by
Jeremiah Weise

Tag currently applied ?
Yes

Remove tag from Jeremiah

Additionally, removed tags will show up in the chronological view of the Contact activity history.

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Lead ☐ Client ☒ Other ☐

Info ⓘ



Jeremiah Weise

Janitor

Thryv

8182146824

jeremiah.weise@keap.com



Text



Email



Tag



Note



Task



More

Contact activity ☰ 🕒

Today



Tag removed by Jeremiah Weise10:16 PM

Sales Nurture Sequence



Tag applied by Jeremiah Weise10:16 PM

Sales Nurture Sequence

Contact Score Panel & Activity History

Changes to a contact's score will now appear in the activity history so users can see the score changes within the context of the chronological activity that occurred.

Jan 21, 2025



Lead score decreased by 2 flames11:59 AM



Tag removed by Jeremiah Weise11:59 AM

Jeremiah



Tag applied by Jeremiah Weise11:59 AM

JW

Jan 14, 2025



Lead score increased by 2 flames11:33 AM



Tag applied by Jeremiah Weise11:33 AM

Jeremiah

