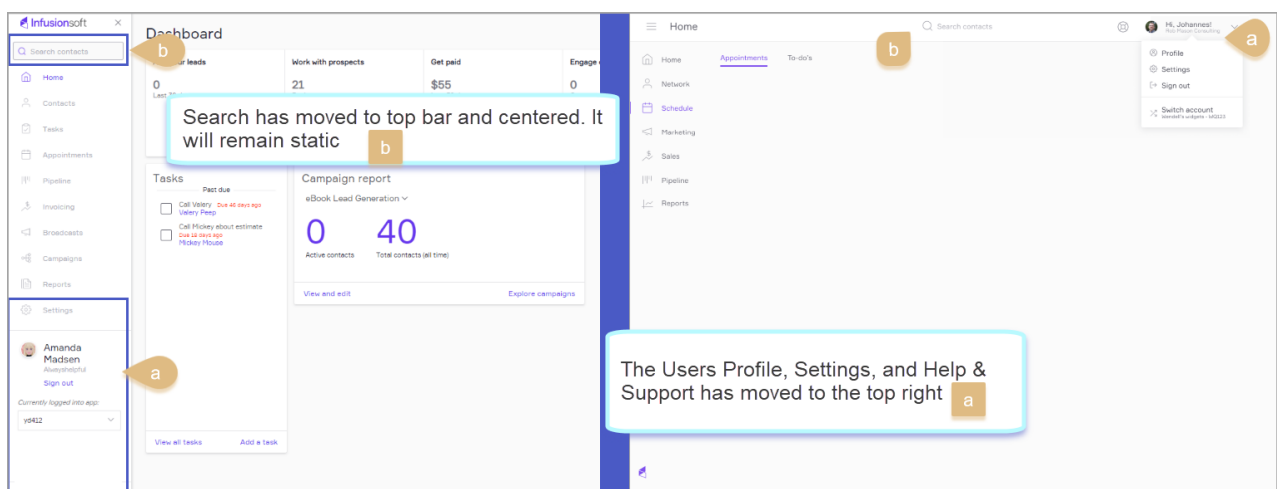


September update 2018 | Keap

Last Modified on 02/15/2019 9:45 am MST

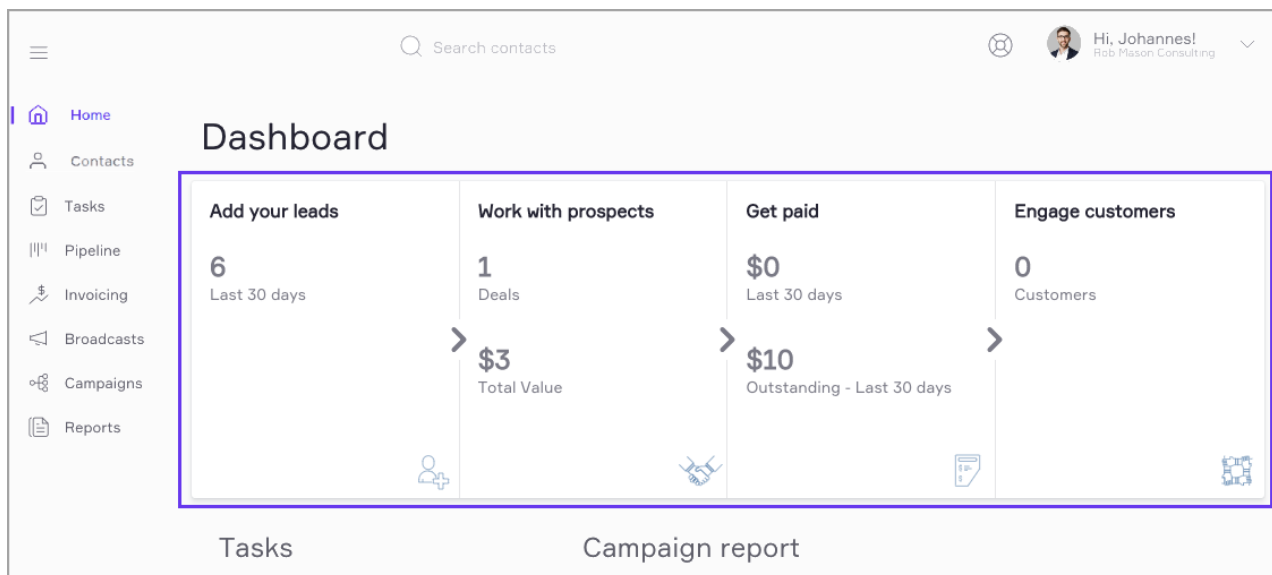
Navigation update

We have tidied up our navigation! Easily access your profile and settings and switch between your accounts in the top right side of your window. You can also collapse the navigation on the left and still have the ability to search for contacts.



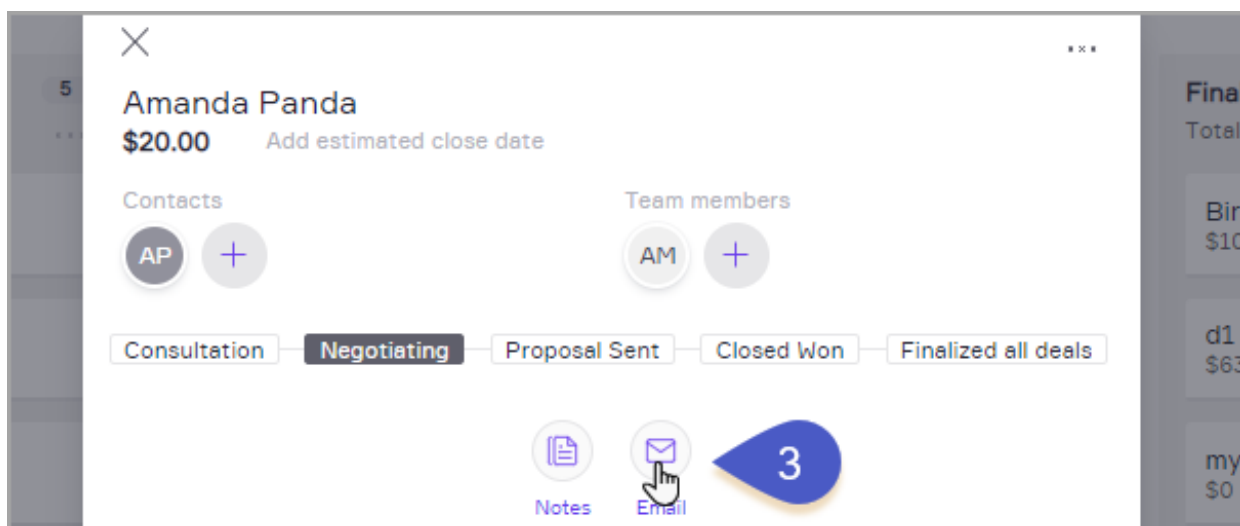
Customer lifecycle dashboard

A simpler, more intuitive dashboard is here. See your tools organized by the natural progression of the customer lifecycle - from acquiring new leads, to growing relationships with existing customers. To learn more [click here](#).



Pipeline deal email improvement

Send customized emails from deal cards within your Pipeline. With full rich text editing capabilities, you can add bullet points, change font sizes, link to URLs, and more! For more info, [click here](#)



New mobile app for iOS

Our new mobile app for iOS lets Infusionsoft users add or access customer info, tasks, and notes on-the-go, keeping you prepared and ensuring you make a

winning impression with customers. Mobile reminders and alerts prevent you from missing important to-do's. [Click here](#) to download, and for more information, [click here](#).

Note: This app is designed for New Infusionsoft users. Classic Infusionsoft users can continue to use or download our current mobile app.

Quotes

Create professional looking quotes to send directly to your Infusionsoft contacts. Customers can easily accept your quote by clicking the 'Accept Quote' button, and your quotes can be quickly converted into a payable invoice with the click of the 'Convert to invoice' button. Track the status of all of your quotes in one place and get notified when your quote is accepted so you can plan your work. For more information, [click here](#).

Updated tabs on the contact record

We've reduced the number of tab options on the contact record to the most used (Activity, Details, Notes, Email, Money), and provided a "more" tab. For more information, [click here](#).

Export contacts - custom fields addition

Easily export all of your contact data, including custom fields. For instructions, [click here](#)