January update 2019 | Keap

Last Modified on 02/15/2019 9:34 am MS7

Payment History

Display completed payments or processed refunds on an invoice so your clients can see their payment history. For more information, click here

Email Sync with Gmail

Sync with your Gmail account. Every time you send or receive an email from one of your Infusionsoft contacts, it will be stored in their contact record. For more information, click here

Invoice discounts

Add discounts to invoices. Choose between a dollar amount or percentage discount, and the total will update accordingly. For more information, **click here**

Invoice auto reminders

Get out of bill collecting with reminders for your invoices and quotes. Set up reminders that automatically notify you when a quote or invoice from a customer is due, so you can remind your customer. We'll even get an email started that you can customize or keep and send right away. Get reminded and get paid on time, click here

Lifecycle Dashboard update

View the activity of all your contacts in one place. Track the emails you've sent, recently added notes, and added tasks across all your Infusionsoft contacts. Use the widget to view recent activity from the last 30 days, directly from your dashboard. For more information, **click here**

Import contacts

Importing your contacts is now easier than ever. No one likes a pesky error message. To ensure the success of your list import, you'll now be guided through each step with helpful instructions. Importing a large file? There's no need to wait around for it to upload. You can close the page and a message will pop up to let you know the status. For more information, click here