March 24, 2023 | Keap_⋄

This article applies to:

Pro

Max

Merge Duplicate Contacts (Pro/Max)

You can now regularly check for and merge duplicate contact records. First, you will need to check for duplicate records. The dup check tool identifies two matching records at a time based on the criteria you select. Then, you can choose to merge all duplicates automatically, or go through them individually and manually merge them. Currently, the merge duplicate contacts function does not merge appointments or deals. Contacts will have to be manually added back to any deals, and any upcoming appointments will need to be cancelled and rescheduled. Learn more.

Centralized Reporting Hub (Max/Max Classic)

You now have a single place to view and search all available reports in Keap Max and Max Classic. Save time by not having to remember where your most important reports are. The Centralized Reporting Hub will let you view and search all of your reports, and pin your top 10 most relevant reports and saved searches to the top for quick access. Learn more.

Customer App Edition in Help Menu (Pro/Max/Max Classic)

The app edition (Pro/Max/Max Classic) will now be visible in the help menu so you can more easily identify your edition. Learn More.

Public Forms Thank-You Page preview (Pro/Max)

When you set up your public forms, you can now preview what the "Thank you page" will look like. Learn more.

Bug fixes

- File Download buttons were left aligned when sent from a campaign using the new email builder
- After receiving a text from your Keap Marketing Number that isn't yet opted
 in, then clicking to view the conversation from within the contact, it showing a
 blank section for conversations.
- When a contact paid an invoice and a new item was added to the notification center, that notice just said "paid an invoice" and "paid a total of"
- In some apps, when navigating to My Day > Tasks, the query*loadAppTasks* was timing out and causing no tasks to be displayed on the page
- When copying and editing an existing Task Goal from a Campaign you could not "Save" or "Exit" the Task Outcome settings window