Keap Mobile: Contact notes

This article applies to:

Install Keap Mobile to your iOS or Android device

Our mobile app lets Keap 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.

Adding notes in a contact record

- Navigate to Contact
- Tap on the More button
- Tap on Notes

- Tap on Add a note

- Fill in note
- Tap Done
Note activity

- Navigate to Contact
- Once a Note is created for a contact, tap on the Notes Activity card
a. View list of all contact notes
b. Click + to add additional notes
c. Tap on a specific note to see the details
d. From details you can edit

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[3:55] Notes

Note
Jan 31, 2019
Mike called back and needed additional information about the quote.
Created by Alwayshelpful Support

Note
Jan 31, 2019
Had meeting with Mike. He is reviewing documents and will schedule a follow up meeting.
Modified by Alwayshelpful Support
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e. Edit or delete
Had meeting with Mike. He is reviewing documents and will schedule a follow up meeting.