# Keap Mobile: Adding contacts

Last Modified on 10/11/2024 11:22 am MST

Tags: Keap-Mobile

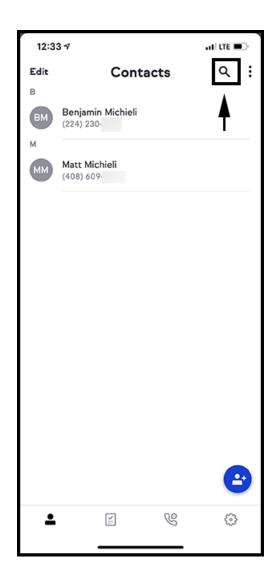
Install Keap Mobile to your iOS or Android device

Our mobile app lets Keap users add or access customer info, tasks, and notes onthe-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.

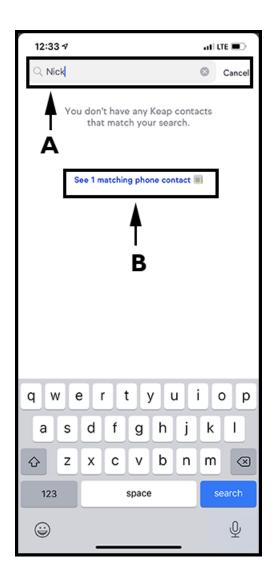
- 1. Adding contacts directly from your mobile device
- 2. Adding contacts
- 3. Entering manually
- 4. Scan a business card
- 5. Importing contacts from device

## Adding contacts directly from your mobile device

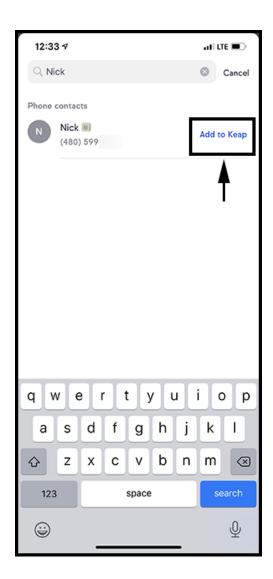
- 1. To access this feature navigate to your contacts list
- 2. Tap **Search icon** to search for a contact



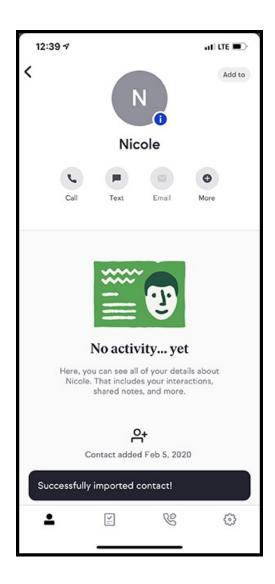
- 3. A) Search for a contact that you know is not in your Keap app but is saved in your device's contacts app. You'll see that we found a matching record in your device contacts.
  - B) Tap "See 1 matching contract"



4. Tap **Add to Keap** to import a contact, instantly allowing you to make calls, send messages, add notes, and add tasks.



5. Congrats! Your contact has been successfully imported.



## Adding contacts

- 1. Go to  ${\bf Contacts}$  by tapping the person icon
- 2. Tap the add contact button in the lower right hand corner



You'll see three options to add contacts:

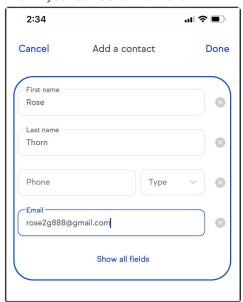
- **Enter manually** which will allow you to manually enter in contact details
- **Import contacts** which will allow you to see the contacts saved on your mobile device and then import to your application
- **Scan business card** will allow you to take a picture of a business card that will automatically transcribe the text allowing you to easily add a contact

#### **Entering manually**

1. Tap Enter manually



2. Enter in your contact's information



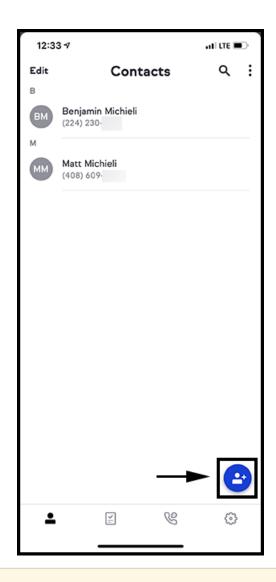
3. Tap **Done** 



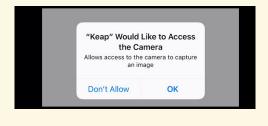
**Note**: Either a first name or email **must** be entered to save a new contact.

## Scan a business card

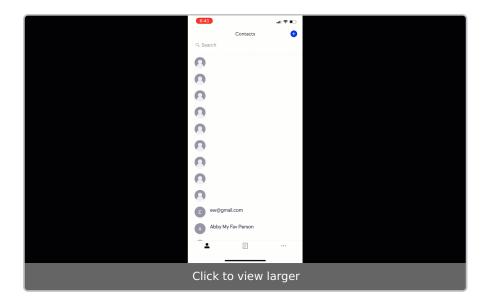
- 1. Go to **Contacts** by tapping the person icon
- 2. Tap the blue add contact button



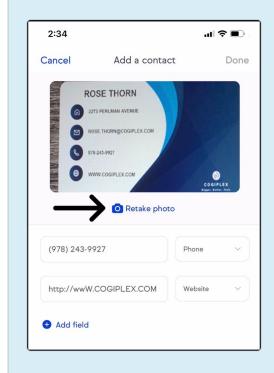
**Note**: The first time you scan a business card the app will ask permission to access your camera. Tap "OK" to give permission.



- 3. Position the business card in the frame
- 4. Tap on the camera action button on the bottom to capture the image
- 5. Once the image is captured it'll take 1-3 seconds for the transcription to work



**Pro-Tip!** Steady your hand to take the best picture. If the image is blurry or the transcription missed content, tap on the Retake photo button to try again

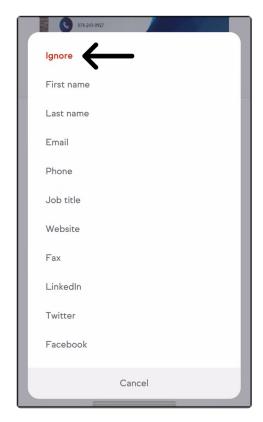


- 6. Review the information and edit as desired
- 7. If you would like to change a field type simply tap on the field type and select a different field.



#### Supported field types:

- First name
- Last name
- Company
- Email
- Phone (phone extensions are not supported)
- Job title
- Website
- Fax
- Linkedin
- Twitter
- Facebook
- You can tap on 'Ignore" if you don't want to save a specific field



8. In some cases, a business card has content on the back of a card like a name or website. In these situations you can tap on **+Add** a field to add an additional field and manually enter in details.



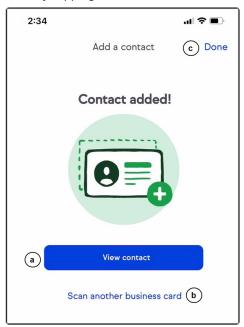
9. When you're ready to save the contact tap on  ${\bf Done}$ 



**Note**: In order to click "**Done**" one of the three fields must have: Email, First Name, or Last Name.

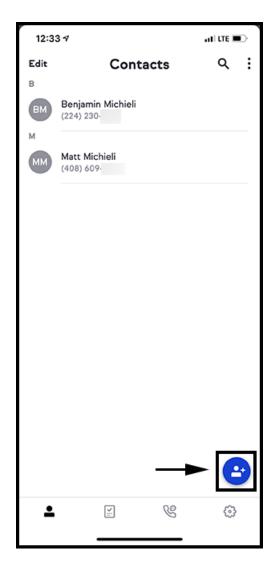
#### The next screen will allow you to:

- a. View the newly created contact
- b. Scan another business card allowing you to easily scan multiple business cards
- c. Finish by tapping on **Done**

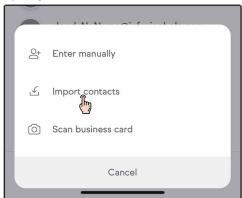


## Importing contacts from device

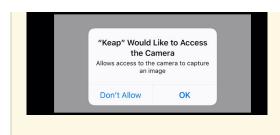
- 1. Go to Contacts
- 2. Click the blue + located on the bottom right



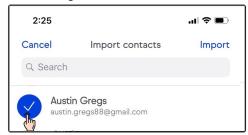
#### 3. Tap Import contacts



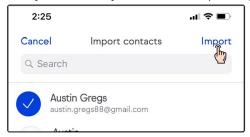
**Note**: The first time you import contacts, the app will have a**Import contacts** button and then ask permission to access your contacts. Tap **OK** to give permission.



4. Scroll through the list and select the contacts to import



5. Once you've made your selection, tap on **Import** 



**Pro-Tip!** Contacts are instantly uploaded. Meaning you can find them through the Desktop right away. The mobile app refreshes every 10 minutes but simply pull down to help the app refresh.

