This article applies to:

New to Keap or looking to do something new? Check out our webinar series here!

Set up your profiles
- Set up your Business Profile
- Set up your User Profile

Add your leads and clients
- In the Mobile application, you can add contacts manually, import from your Contacts List or Scan a business card.
- On the web application, you can Import Contacts or add them individually.

Sort your contacts into Leads, Clients, Invoiced, or Paid - Article coming soon
- Once you have leads, you can: send intro email, book initial consultation or send a quote.
- Once you have clients, you can: send follow-up email, book follow-up meeting, or send an invoice.

Keap Mobile App
- Mobile App for iOS
- Mobile App for Android
- Keap Messages and Keap Business Line Setup

Keap Messaging using the Web Application
- Messages on Web

Sync your calendar for appointment booking
- Connect to Google Calendar
Invite a lead or client to meet
- Appointments page
- Setting up the appointment booking
- Using appointment booking page
- Reschedule or cancel appointments
- Appointment reminders
- Create appointments from contact record Book Now
- Appointments FAQs

Set up Lead Forms

Create an Email Broadcast
- Send an individual email - Article coming soon
- Use the Simple Broadcast Tool
- Use the Advanced Email Broadcast Tool

Qualify leads quickly with Quotes
- Send a quote from a contact record
Send Invoices and get paid

- Set up **WePay**
- Create and send an **Invoice**
  - Once you have invoiced, you can: see who owes money, send a payment reminder, and add payments.
  - You can also keep track of paid clients!