The global action button on the Dashboard allows access to key actions from anywhere in the Keap application. Use the button to add contacts, create a task, send an email, or add a note to a contact record. You may also see options to use Smart Forms you have created or send messages if you have set up Keap Business Line.

1. Click the New button in the top navigation bar

2. A drop-down appears below with a list of actions that include: Contact, task, Email, and Note.