Pro - Getting Started

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 iOS 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
Pro Tip! Android users can navigate to https://keap.com, log in to their account, and bookmark our website, which is designed to work on a variety of screen sizes, including smartphones and tablets.

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

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!