Pro - Getting Started

This article applies to:

Pro

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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!