Pro - Getting Started⚭

This article applies to:

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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!