Onboarding checklists

This article applies to:

Our onboarding checklists help new Keap customers choose what is most important to their business and provides a list of tasks to get started. You can access all the checklists from the **Getting Started** section of your app. Depending on the answers you provided when setting up your application, your checklist may not exactly match the examples in this article.

Get started by choosing an area of focus below.

First things first. Let's add your contacts.

1. Add a new contact manually
2. Import more of your contacts
3. Create a new tag and apply it to a contact
4. Review and edit your "My profile" information
5. Review and edit your "Business profile" information

Improve and connect your lead sources

1. Create and connect a public form to your websit
2. Create and share a public form on your social platforms
3. Download the Keap mobile app and scan a business card
4. Ask your existing clients for referrals with an email template

Book appointments with your contacts

1. See what you can do with Appointments
2. Create your first appointment type

Automate your workflows

1. Quickly follow up with new leads
2. Keep your leads engaged
3. Schedule consultations with new leads
4. Request reviews from past clients

Request and collect payments

1. Send yourself a test invoice
2. Build out your products and services menu
3. Connect your payment processor
4. Connect your QuickBooks Online account

Track your daily activities and processes

1. Connect your favorite tools to Keap
2. Stay on top of the tasks on your to-do list
3. Track your processes (sales and more) with Pipeline

Promote and market my business

1. Send your first broadcast email
2. Set up Google Reviews