Integration Setup: Keap

Automation · https://coreel.ai/help/integration-setup-keap/

Connect Keap to enable CRM-linked sending/tracking workflows where supported.

Before You Start

- Logged in to coReel
- Access to the correct Keap account
- Owner/Manager permissions if required for org-level setup

Connect Keap

1. Open **Integrations** (/integration).
2. Click **Keap** in **Available Integrations**.
3. Authenticate with your Keap credentials.
4. Approve access permissions.
5. Return to coReel.

Confirm Connection

Keap should appear in **Connected Integrations** and display linked account info when available.

If Connection Appears Stale

If UI says connected but actions fail:

1. Disconnect Keap
2. Reconnect Keap
3. Log out/in to refresh session state
4. Retry send/tracking workflow

Token Refresh Notes

Keap tokens expire on a schedule. Your backend should refresh tokens proactively before expiry.

If reconnects are frequent, check server refresh job/cron logs.

Disconnect/Reconnect Keap

1. Click **Disconnect** for Keap.
2. Reconnect with correct Keap account.
3. Run a small test action to confirm it’s live.

Best Practice

Keep Keap integration ownership with a stable admin account to reduce accidental disconnects.