## Export data from Max Classic

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## This article applies to: Max Classic

Max Classic

If your **user permissions** allow, you can export information from Keap. For exports of 1,000\* records or fewer you can chose to download them immediately in your browser, or send a link to download the file to the email address entered. For exports of more than 1,000\* records, a link to download the file will be emailed. In order to download the file, the email recipient **must** have access to log into the Keap app. \**Maximum export size subject to change* 

The example below shows how to export a contact list. You can use the same steps to export referral partners, opportunities, orders, and various reports from Keap.

1. From the main navigation menu, go to CRM > Contacts

= keap					
My Nav	CRM	Marketing	E-Commerce	Admin	
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center	
Initial Setup	Companies	Email & Broadcasts	Orders	Billing & Account Info	
Dashboard	Opportunities	Lead Generation	Products	Users	
My Day	Referral Partners	Templates	Payment Setup	Import Data	
	Visitors	Dynamic Content	Actions	Data Cleanup	
	Zapier Integrations	Legacy	Promotions	Analytics	
			Legacy		
Edit my nav	Reports Settings	Reports Settings	Reports Settings	Reports Settings	

2. Select a saved search from the drop-down or click New Search and enter search criteria

Contacts
Actions ~ New Search Edit Criteria/Columns Save Prir
Loopard Adama

3. Select the contacts that you want to export or check the **Select All** box at the top of the list to select everyone

Contacts	
Actions ~ New Search Edit Criteria/Co	lumns Save Print
54 results (54 Selected)	
No name	
ld 213	Company Name None

4. Click Actions and select Export

Actions ~ New Sea	arch Edit Criteria/Columns Sav	e Print
Apply Action Set Apply/Remove Tag Assign to Company Create Opportunities Create Referral Partner Referral Create a Task Create an Appointment	10 Selected) Jams AAAA mentum@cursus.org ne:	Phone 1: State: Leadsource:
Delete Contacts Export Mass Update Contacts Merge Duplicate Contacts	lams	Phone 1: (99 State: Leadsource:

5. (Optional) If you have previously saved your export field selections, you may choose the settings to use from the drop-down and click load

Export Results		
1) Load Saved Export Field Selections (optional)		
Name Please select one	Load	Delete
Please select one Weekly export		

6. Check the boxes beside the fields that you want to export. If you plan to do an **update import**, include the ID field

2) Choose fields to export				
	Title	Description		
<	ld	Contact Id		
	Name			
	First Name			

7. Scroll down and choose a file format for the export: CSV, Excel, or ZIP.

✓ How Engaged?	
3) Choose Format	
CSV Excel	
4) Delivery Method	

 Select a delivery method for your export. Exports that contain 1,000\* records or less can be downloaded in the browser. All other exports must be emailed.

Note: Your email will be provided in the Send download link to field by default, but this can be changed to any email. However, the recipient of the email must be able to log into the Keap app to download the file. \*Maximum export size subject to change

<ol> <li>Delivery Method</li> </ol>	bd	
<ul> <li>Download file</li> </ul>	in browser	
Email a link to	download the file	
Send download I numberoneem	ink to — ployee@keap.com	
Give the export a	name (optional) ———	
C	ompliance	

- 9. (Optional) When emailing a link to download the export, you may give the export a name which will be added to the subject line of the email
- 10. (Optional) Enter a name to save the export field settings to use with future exports. Select the check box if all users need to access the saved export settings. You will be able to select the saved export settings the next time you export data.

	Field Selections (options)		
Specify the name	e to associate with these	export field selections.	
Name Monthly rep	ort		

11. Click Process.

Name
Make settings available to all users
Process

## 12. Click OK, got it.

Exports downloaded in browser:

×	
Export downloading	
Your export has begun and will dov your browser momentarily.	
OK, got it	

Exports sent via email:



13. If you chose to download your export in the browser, your file will download automatically

				Name — Make settings a
				Process
export97.csv	Ð	^		

14. If you chose to email your export, navigate to your email inbox, open the email from Keap, and click the download button. If you named your export, that name will be in the subject line.

🔄 🙀 🎾 noreply Your Infusionsoft export 'EOM Data' for locald 8:59
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Your export will only be accessible for 24 hours. If that time has passed, you must initiate the export again.

15. You or the recipient of your email may be prompted to login to download the export if your session has timed out or you may be using a new device

	Log in	
– Email address –		
Password		$\odot$
	Log In	

16. Your export will download automatically. Click Ok, got it



17. Locate the downloaded file

	Email Good
	The open rate for t your average.
ExportFile-0.49444c	