

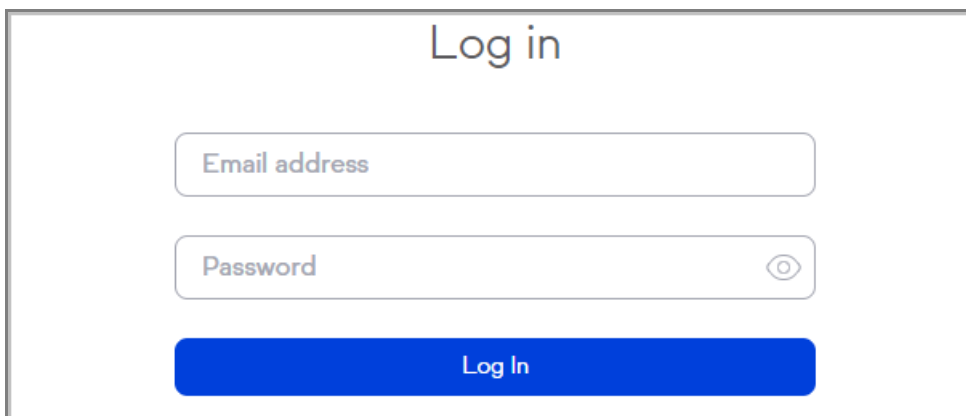
I'm new and want to learn the basics 🗝️

This article applies to:

New to Max Classic or looking to do something new? [Check out our webinar series here.](#)

Sign in to Keep

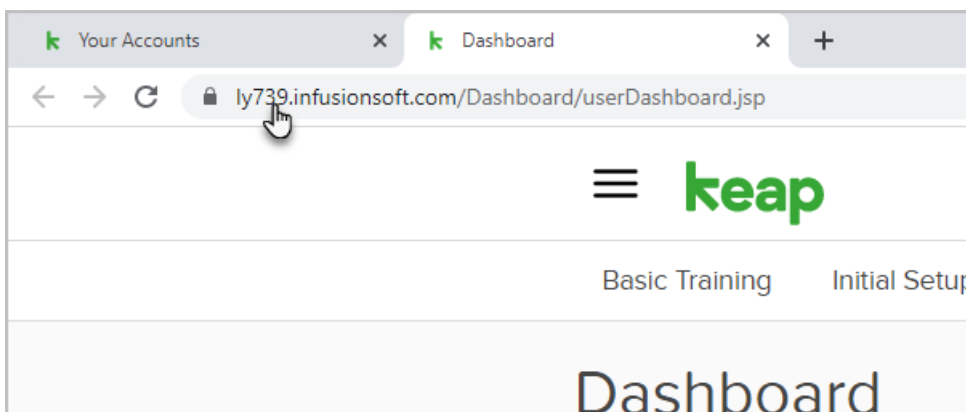
After you [set up your Keep ID](#), go to signin.infusionsoft.com to sign in with your email address and password.



The screenshot shows a login form titled "Log in". It contains two input fields: "Email address" and "Password". The "Password" field has a toggle icon (an eye) to the right of it. Below the input fields is a blue button labeled "Log In".

Your App Name or "App ID"

If you ever need to contact Keep Support, you will be asked to provide your **App Name** - this can be found by signing in to your Max Classic account and looking at the URL prefix. In the screenshot below, the App Name is **ly739**.



Watch these introductory videos!

Navigate Max Classic

Lifecycle Marketing

Campaign Builder Basics

[Email Builder](#) Basics

Customize your email signature

Learn how to customize your email signature for outbound emails. Here is a full step by step walk through of how to [Customize Your Email Signature](#).

Add a contact record

There are numerous ways to add a contact record in Max Classic. The simplest way is to Just click the + button at the top right of the page to add a new contact manually.

A few other ways to add contacts to Max Classic:

- (Manual) [Importing contacts](#)

- (Manual) Custom [Internal Forms](#)
- (Automatic) When a contact submits an online [web form](#) or [Landing Page](#)
- (Automatic) When a contact buys something from an [Order Form](#) or [Shopping Cart](#)

Contact Record Overview

Segmenting Your Contacts

You can organize your contacts by creating tags and applying them to contact records. This allows you to search contacts by a tag or tags. Many times, you'll be creating tags on-the-fly as you are setting up campaign builder automation. You can also simply go to **CRM > Settings** to [set up tags](#) and [tag categories](#).

There are two ways to manually apply a tag to a contact record:

From the search results page, find the contact, click the **Tags** button, click the **Apply Tags** button, enter the name of the tag and click **Apply**.

Marlon Brando
 Id: 23 Email: mb98345*&*^@email.com
 Company Name: None State: None

Notes Tasks Appointments Emails Orders **Tags** Forms Campaigns

Apply a tag

 Apply

You can also add a tag after opening the contact record. On the right side of the page, under their email address and social info is a **Tags** section.

Job Title:
 Person Type: Please select a person type
 Lead Source: Choose a lead source
 Owner: Please select an owner

Billing Address

Street Address 1: 123
 Street Address 2: 123
 City: 123
 State: KS
 Postal Code: 85222
 Country: United States

Phone / Fax

Phone 1: Business 123
 Phone 2: Business
 Fax 1: Business

Email / Social

Email: martincash@gmail.com
 Website:
 Twitter:
 Facebook:
 LinkedIn:

Global Information

Language: English (United States)
 Time Zone: (GMT -07:00) Phoenix

Tags

This Contact does not have any Tags

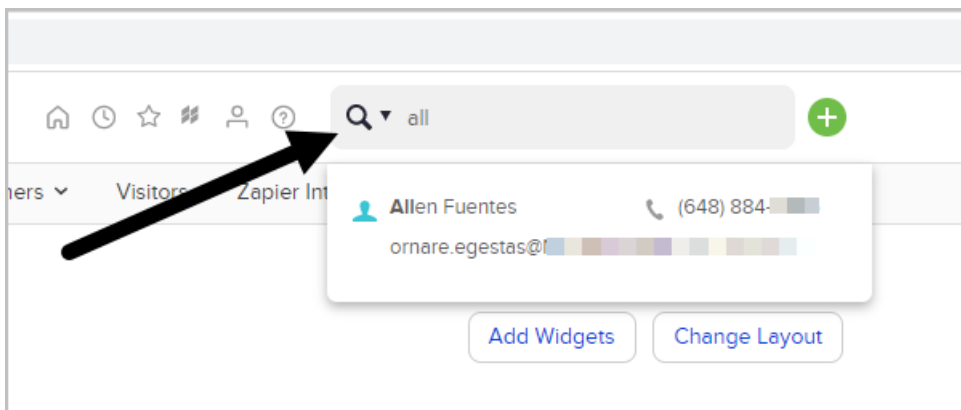
You may have several tag categories on the left side of the page. Choose the name of the tag from the appropriate drop-down box and click the **Apply this Tag** button.

Customer Tags:	Please select a tag	<input type="button" value="Apply this Tag"/>
CustomerHub:	Please select a tag	<input type="button" value="Apply this Tag"/>
Email Engagement:	Please select a tag	<input type="button" value="Apply this Tag"/>
eSubscriptions:	Newsletter	<input type="button" value="Apply this Tag"/>
Family:	Please select a tag	<input type="button" value="Apply this Tag"/>
fgh:	Please select a tag	<input type="button" value="Apply this Tag"/>
Free Items:	Please select a tag	<input type="button" value="Apply this Tag"/>
Functional:	Please select a tag	<input type="button" value="Apply this Tag"/>

Searching Contacts

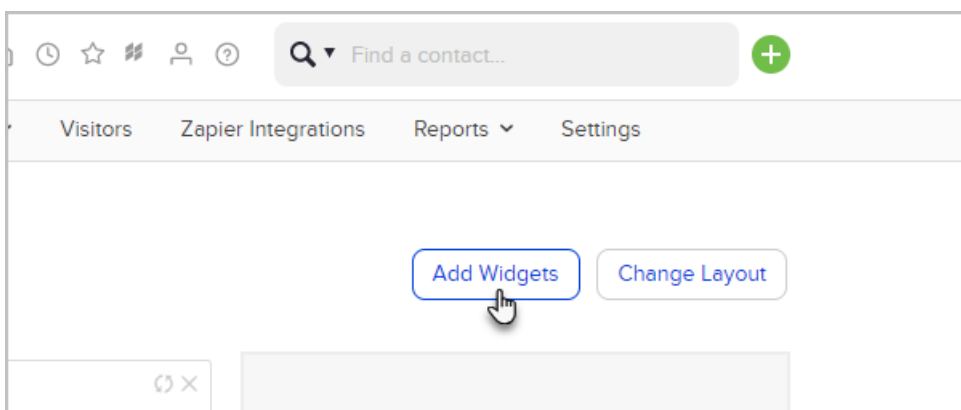
There are two ways to find a contact record in Max Classic. The most common way is to use the quick search bar

at the top right. If you want to perform a more in-depth search (like searching by tags), you'll need to perform an [Advanced Search](#).



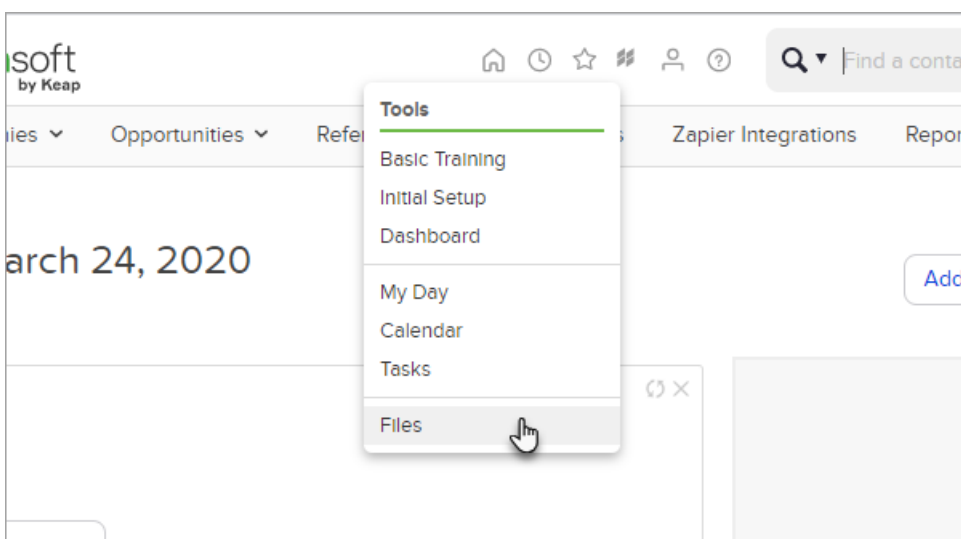
Customize your Home Page Dashboard

Learn how to personalize your home page [Dashboard](#) to show reports and information relevant to you.



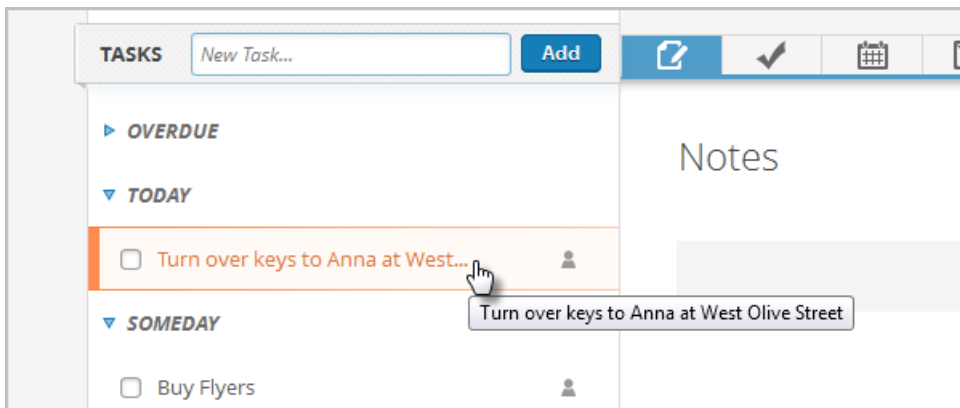
Store files in Max Classic

Learn how to upload and [store files](#) for all users on your account and how to [upload files to a specific contact record](#).



Manage Your Tasks and Appointments with My Day

Learn how to use [My Day](#) to effortlessly manage tasks and appointments in Max Classic.



Max Classic Mobile and Email Sync

You can perform certain tasks in Max Classic using your mobile device. Download the free [Max Classic Mobile](#) app to your iOS or Android device. You can also easily sync your Gmail and Outlook accounts to your Max Classic account by [following these instructions](#)
