I'm new and want to learn the basics
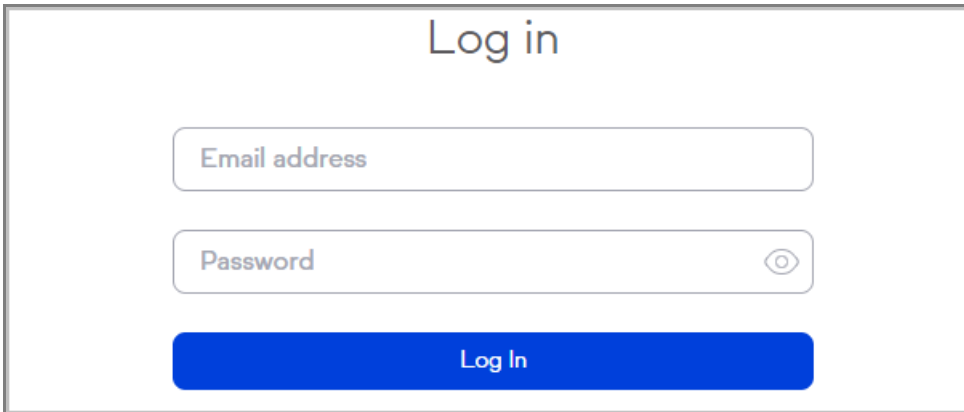
This article applies to:

[Max Classic](#)

Sign in to Keap

After you set up your Keap ID, go to signin.infusionsoft.com to sign in with your email address and password.

Your App Name or "App ID"

If you ever need to contact Keap 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**.
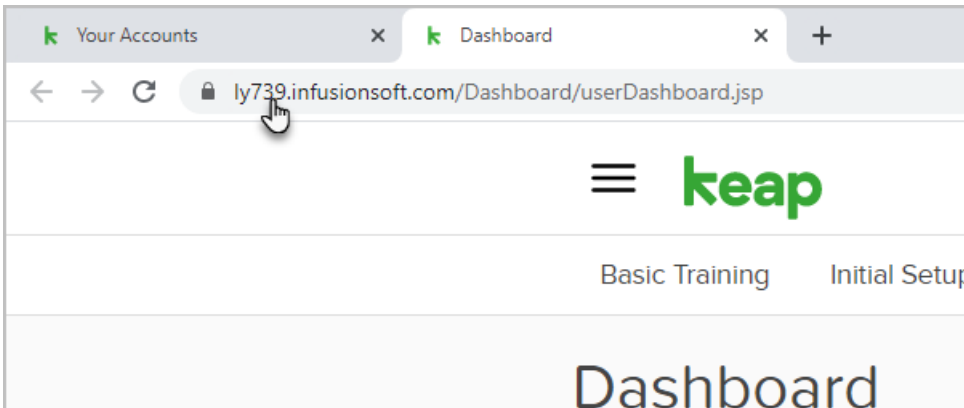
Watch these introductory videos!

Navigate Max Classic

Your browser does not support HTML5 video.

Lifecycle Marketing

Your browser does not support HTML5 video.

[Campaign Builder](#) Basics

Your browser does not support HTML5 video.

[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

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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 tag**s**. 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.**

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.


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.


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.
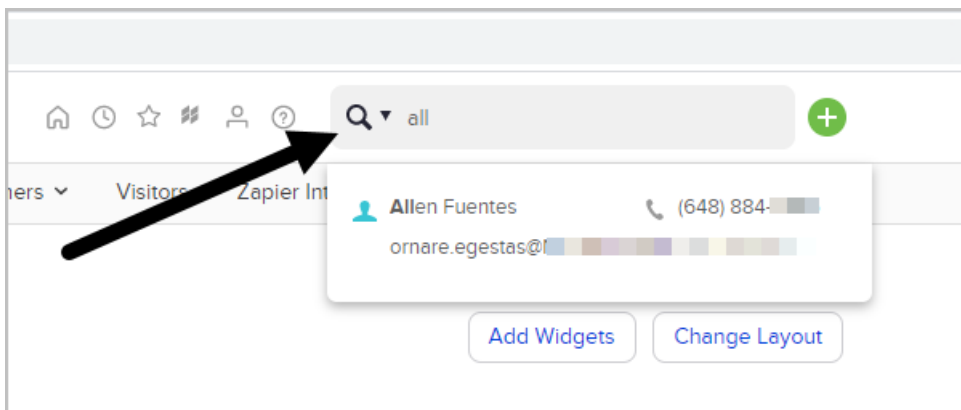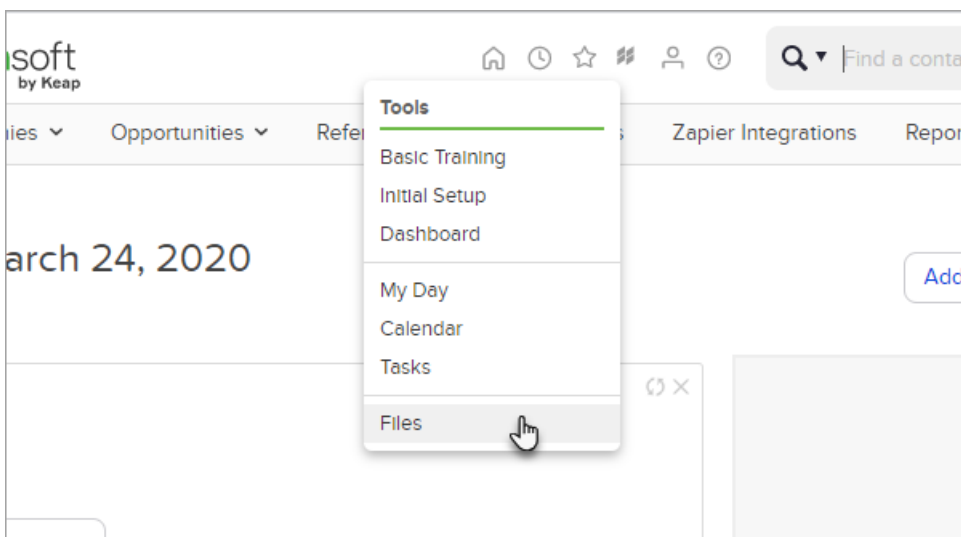

Customize your Home Page Dashboard

Learn how to personalize your home page Dashboard to show reports and information relevant to you.
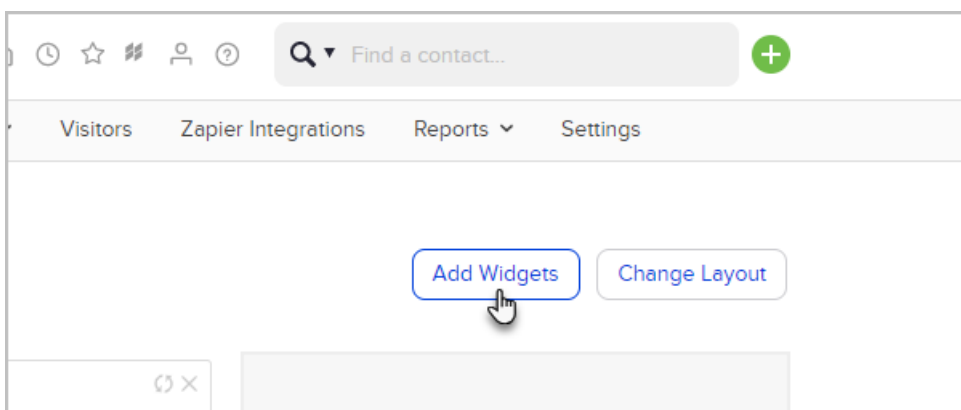
Store files in Max Classic

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.
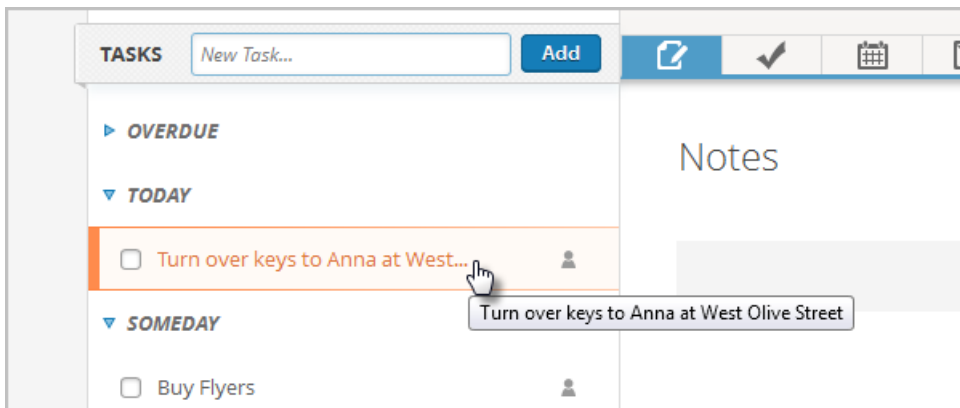
Keap Mobile App and Email Sync

You can perform certain tasks in Max Classic using your mobile device. Download the free Keap 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