

# I'm new and want to learn the basics

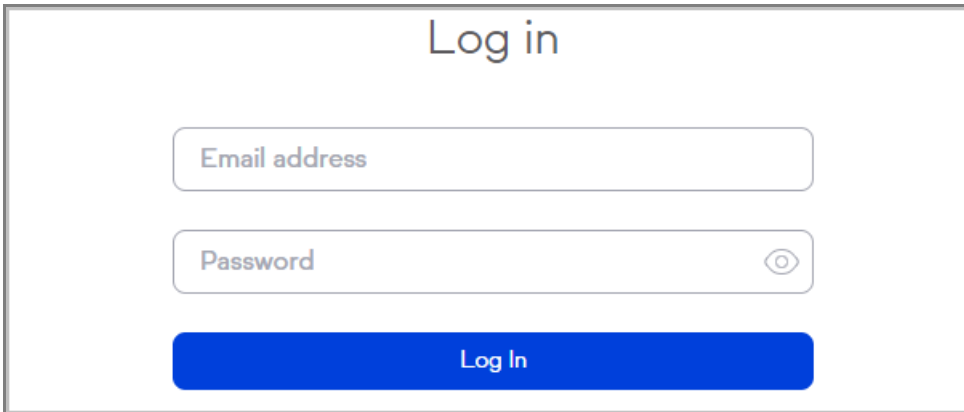
Last Modified on 10/03/2024 8:49 am MST

This article applies to:

[Max Classic](#)

## Sign in to Keep

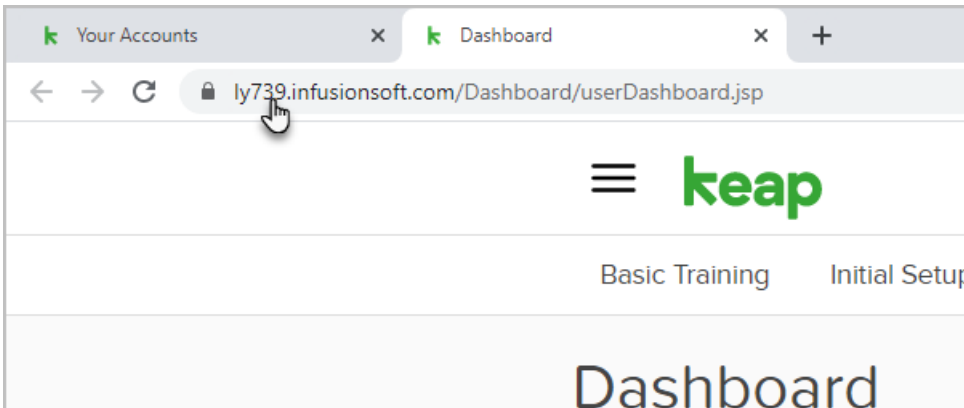
After you [set up your Keep ID](#), go to [signin.infusionsoft.com](https://signin.infusionsoft.com) to sign in with your email address and password.



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

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 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

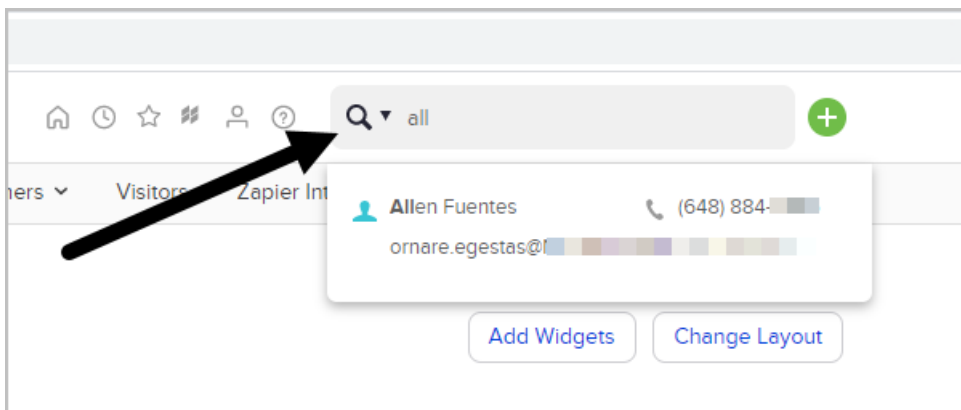
You may have several tag categories on the left side of the page. Choose the name of the tag from the appropriate drop-down box and click the **Apply this Tag** button.

|                   |                     |   |
|-------------------|---------------------|---|
| 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

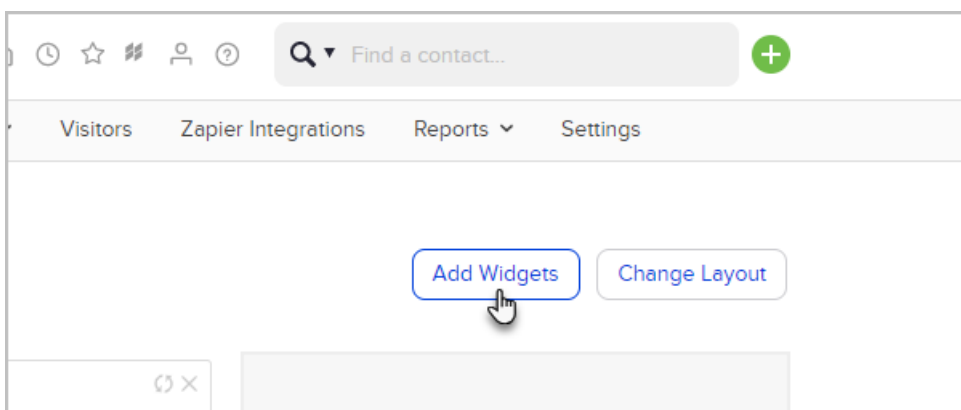
There are two ways to find a contact record in Max Classic. The most common way is to use the quick search bar

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](#).



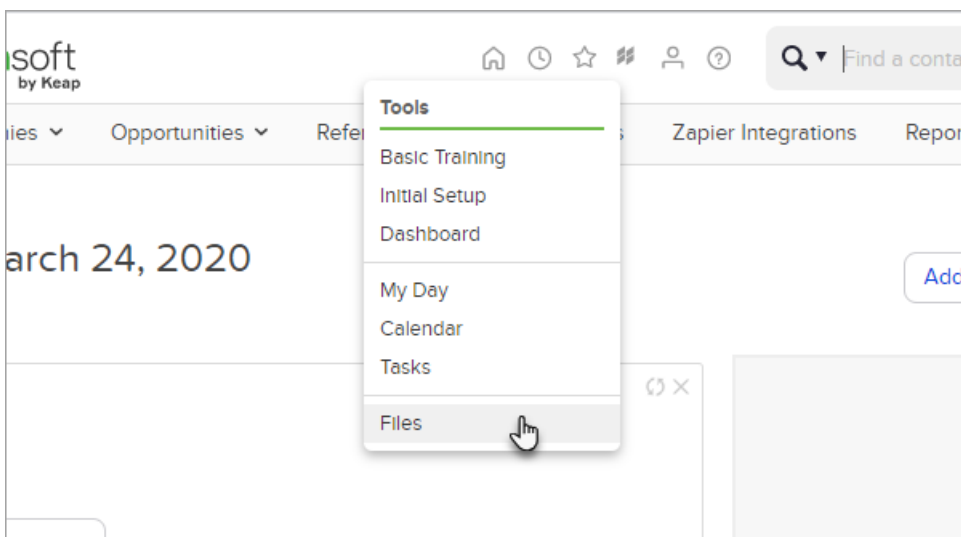
## Customize your Home Page Dashboard

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



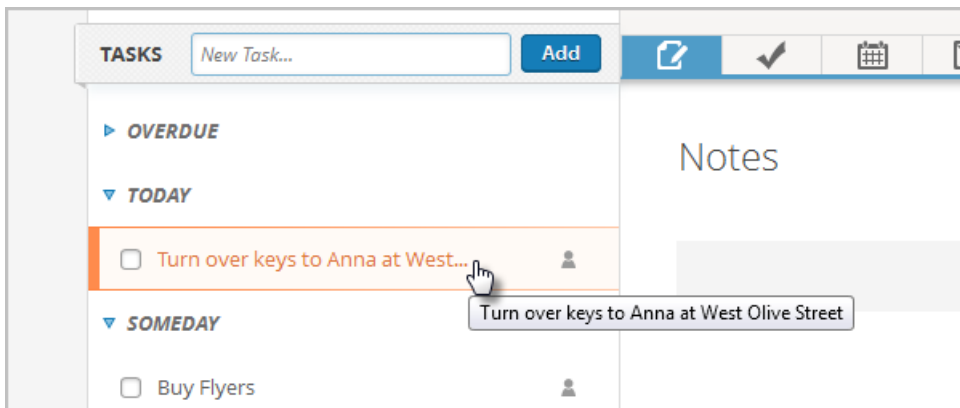
## Store files in Max Classic

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.



## 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](#)

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