Checkout Forms

This article applies to:
Pro
Max

Checkout Forms are a unique feature in Keap Max and Pro which allows you to take payment from your customers without an invoice. Build your form, share it with your customers, then kick back and let the money roll in!

1. Create a Checkout Form
2. Initiate recurring payments with a Checkout Form
3. Additional Features in Max

Create a Checkout Form
1. Navigate to Sales > Checkout Forms
2. Click Add
3. Select **Checkout form**

4. Select an existing product(s) or create a new product

5. Customers who have not set up a payment processor will be prompted to do so at this point

6. Click **Next**

7. Create an internal name for your form

8. Add an optional headline to display at the top of your form
9. Add or create fields to capture additional information from your customers

Add fields
Create new field

10. Click Next

11. Style your Checkout Form by choosing to display your company logo and selecting page background and button colors that fit your brand

12. Click Next

13. Choose to use the default thank you page or redirect to another URL

14. Your Checkout Form is now live and can be shared with a link or by embedding it on your website
Here's an example of a live Checkout Form:

15. Click **Done** to return to the Money > Checkout Forms page
Initiate recurring payments with a Checkout Form

Your Checkout Forms can be configured to start recurring payments, eliminating the need to physically enter a client’s credit card number or invoice them over and over.

When a client pays you through a Checkout Form, you will see a paid invoice for the initial payment and a new recurring payment record will be added to your Recurring Payments tab.

1. While adding products to a Checkout Form, open the menu for an item that you want to charge for on a recurring basis.

2. Click the **Recurring** button

3. Select a **Billing cycle**

4. Choose when to end the recurring charges
5. Save to return to main Checkout page to continue editing

Please note - once you have set up the Recurring payments checkout form you will not be able to view/edit the recurring payment section of the form. You will be able to view the options that you created on the url of the Checkout form itself.

Additional Features in Max

1. Upsells on Checkout Forms