

Checkout Forms

This article applies to:

[Pro](#)

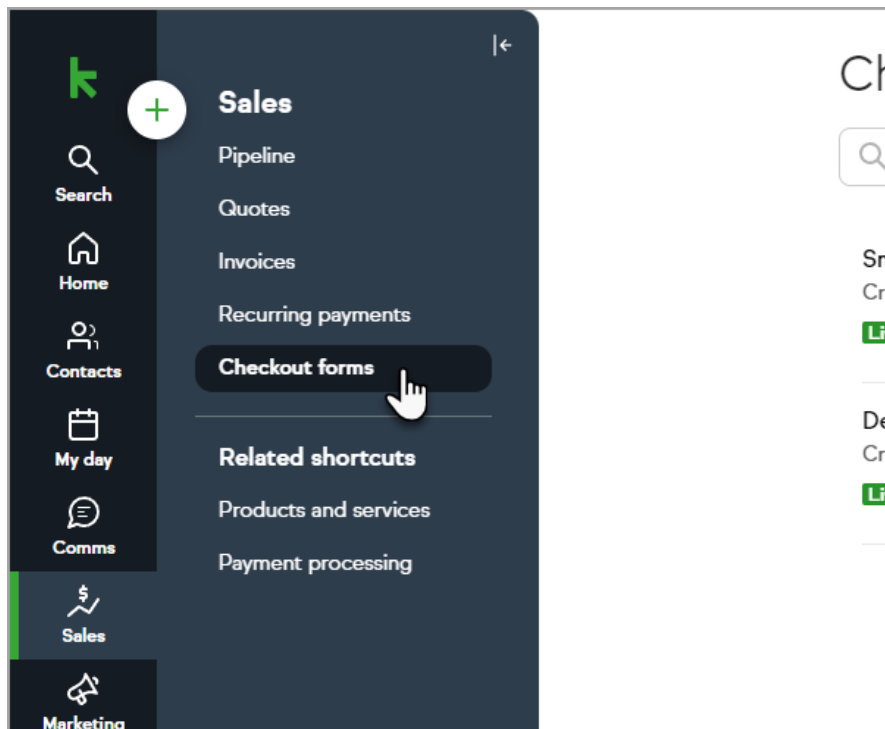
[Max](#)

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!

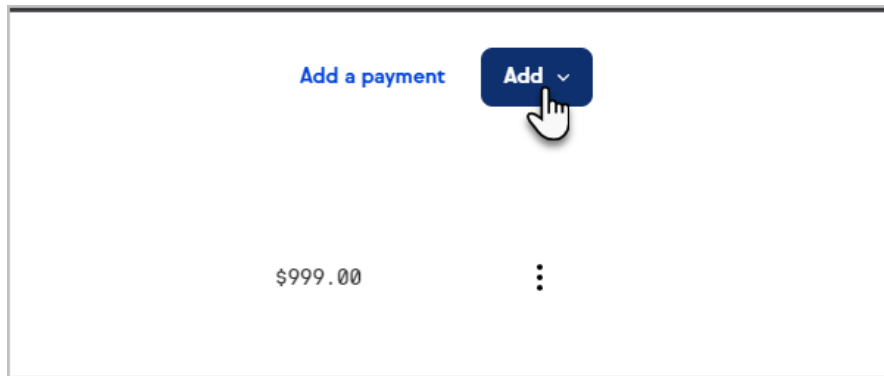
1. [Create a Checkout Form](#)
2. [Initiate recurring payments with a Checkout Form](#)
3. [Additional Features in Max](#)

Create a Checkout Form

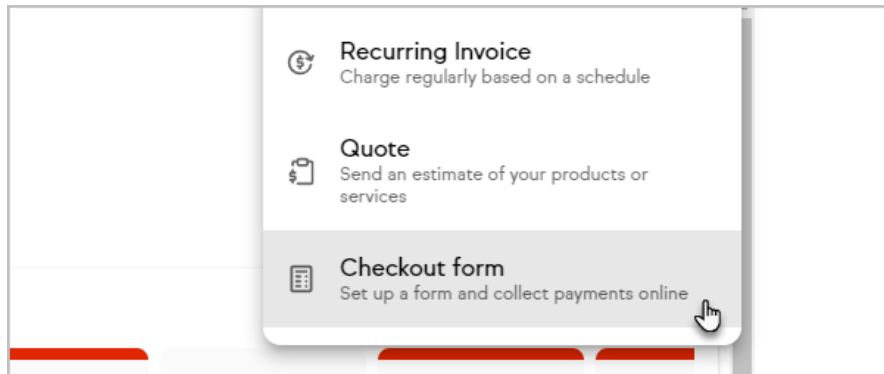
1. Navigate to **Sales > Checkout Forms**



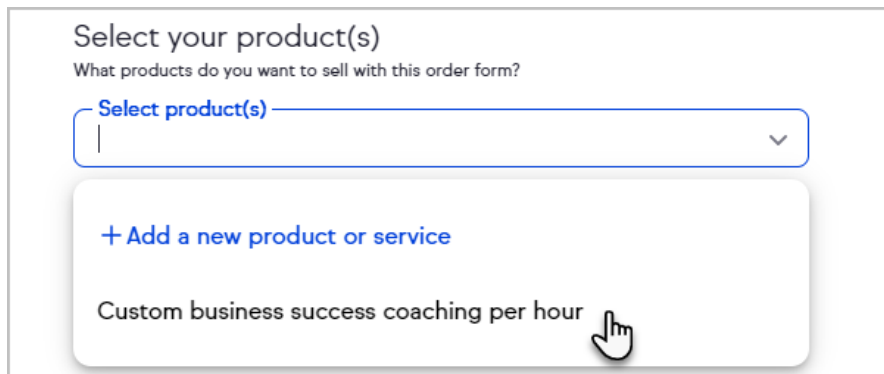
2. Click **Add**



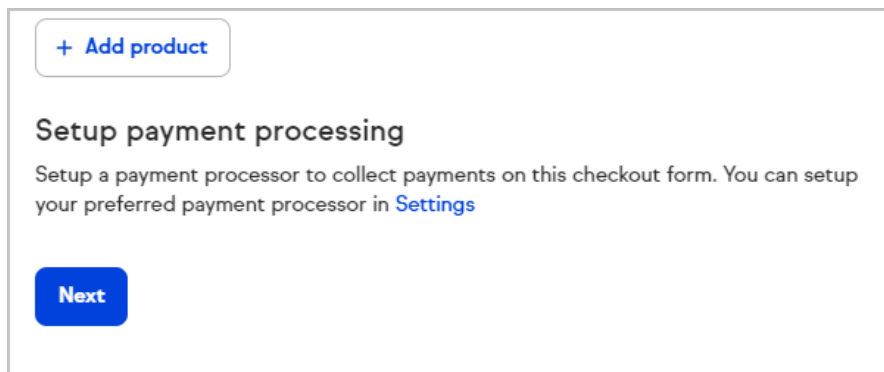
3. Select **Checkout form**



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

Name your checkout form

Give this checkout form a unique name so you can easily find it in your list of forms.

Checkout form name*

https://staging.keep.app/checkout/jd188stge/custom-coaching


Headline (optional)


A headline that shows above the form fields

9. Add or create fields to capture additional information from your customers

Fields

Build your form by selecting your fields. Add commonly used ones, or create your own custom ones.

 **Payment fields** This information is locked and cannot be modified as it can affect payment processing.

[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

Style your checkout form

Add styling to your form to match your branding.

General

Display company logo
 You can change your logo in Settings [here](#)


Page background color


12. Click **Next**

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

Thank you page

What should your customers see after they submit their order?

 [Preview](#)

Default thank you page 

Redirect to another page (URL) embed code, or use the hosted page

14. Your Checkout Form is now live and can be shared with a link or by embedding it on your website

Share your checkout form


Place the checkout form on your website with the embed code, or use the hosted page link to share it directly to your customers.

[Share a link](#) [Add to your website](#)

Use this link to share on social media, text, or email

<https://staging.keep.app/checkout/jd188stge/custom-coaching>


Here's an example of a live Checkout Form:

 **\$120.00** [Close details](#)

One-time


Custom business success coaching per hour	\$120.00
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Total due	\$120.00
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Keep Help Center

<input type="text" value="Card number*"/>	<input type="text" value="Expiration*
MM/YY"/>	<input type="text" value="CVV*"/>
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 **Pay \$120.00 now**

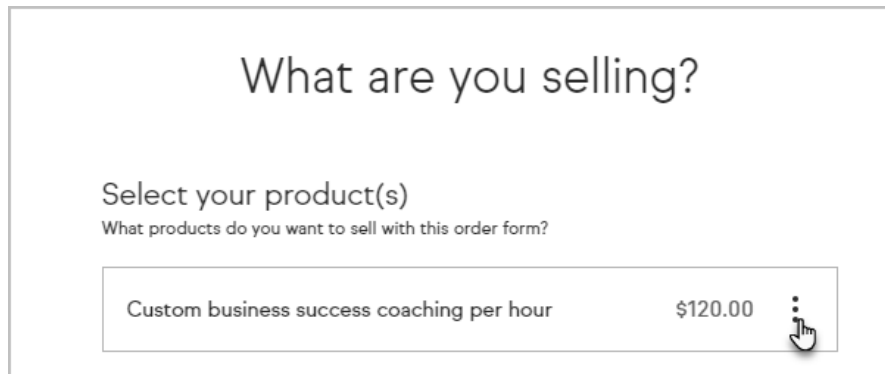
15. Click **Done** to return to the **Money > Checkout Forms** page

Initiate recurring payments with a Checkout Form

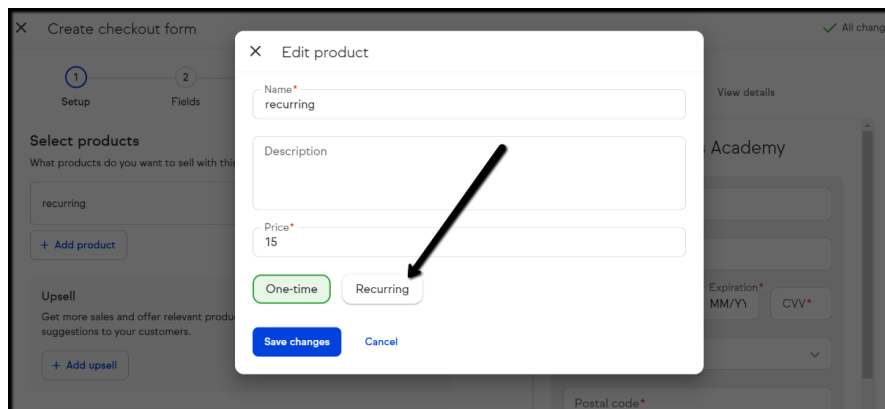
Your Checkout Forms can be configured to start recurring payments, eliminating the need to physically enter a client's credit card number or invoice them over and over.

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

The screenshot shows a checkout form configuration interface. At the top, there is a text input field for the price, which is currently set to "15". Below the price field, there are two radio buttons: "One-time" and "Recurring". The "Recurring" button is selected and highlighted with a green border. Below the radio buttons, there is a question: "How often do you want to charge this product?". There are four radio buttons for frequency: "Yearly", "Monthly", "Weekly", and "Daily". The "Monthly" button is selected and highlighted with a green border. Below the frequency options, there is a section titled "Payment schedule" with the sub-question "When should payments end?". There is a dropdown menu with "Never" selected. At the bottom of the form, there are two buttons: "Save changes" (a blue button) and "Cancel" (a text link).

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](#)
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