

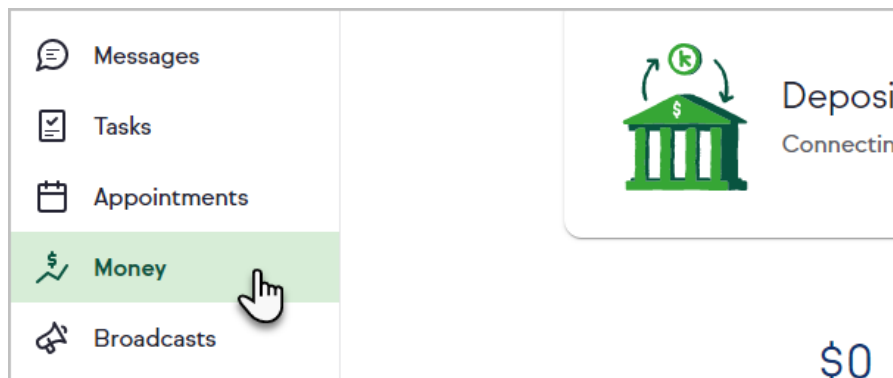
# Checkout Forms

This article applies to:

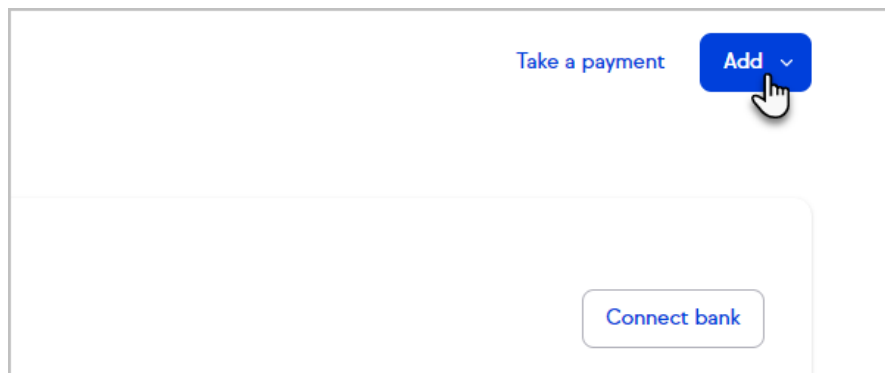
Checkout Forms are a unique feature in Keap Max and Pro which allows you to take payment from your customers without an invoice. Build your form, share it with your customers, then kick back and let the money roll in!

## Create a Checkout Form

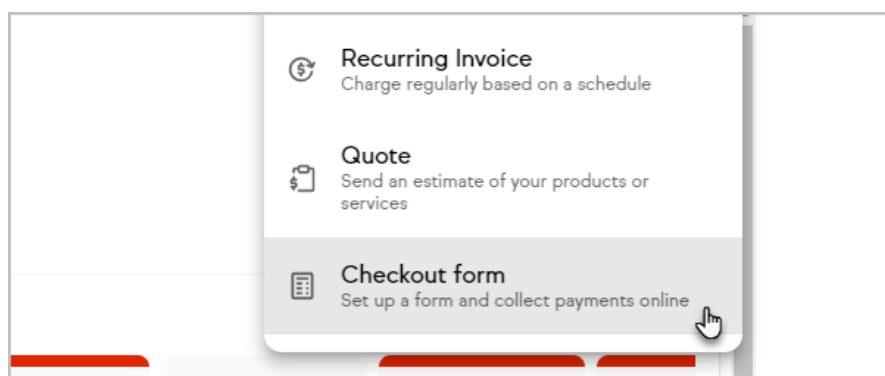
1. Navigate to **Money**



2. Click **Add**



3. Select **Checkout form**



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

Select your product(s)  
What products do you want to sell with this order form?

Select product(s)

+ Add a new product or service

Custom business success coaching per hour

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

+ Add product

### Setup payment processing

Setup a payment processor to collect payments on this checkout form. You can setup your preferred payment processor in [Settings](#)

Next

- Click **Next**
- Create an internal name for your form
- 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\*

Custom coaching

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

Headline (optional)

Keep Help Center

A headline that shows above the form fields

- 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

- 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

#FFFFFF


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?

Default thank you page ▼ [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.keap.app/checkout/jd188stge/custom-coaching`

Here's an example of a live Checkout Form:

The screenshot shows a checkout interface for 'keep'. At the top, there is a shopping cart icon, the amount '\$120.00', and a 'Close details' link. Below this, the order details are listed: 'One-time' and 'Custom business success coaching per hour' for '\$120.00'. A horizontal line separates this from the 'Total due' of '\$120.00'. The 'keep' logo is displayed in green, followed by 'Keep Help Center'. The payment form includes fields for 'Email\*', 'Name on card\*', 'Card number\*', 'Expiration\* MM/YY', 'CVV\*', 'Country\*' (with a dropdown arrow), and 'Postal code\*'. At the bottom, a black button with a lock icon and the text 'Pay \$120.00 now' is visible.

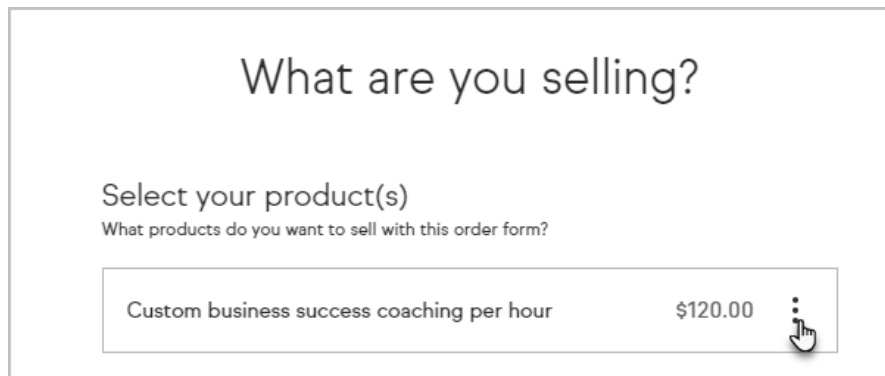
15. Click **Done** to return to the **Money > Checkout Forms** page

## Initiate recurring payments with a Checkout Form

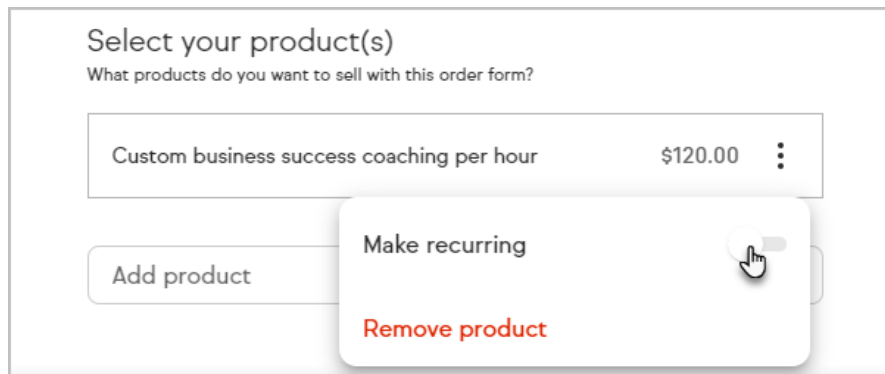
Your Checkout Forms can be configured to start recurring payments, eliminating the need to physically enter a client's credit card number or invoice them over and over.

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 **Make recurring** toggle



3. Select a **Billing cycle**
4. Choose when to end the recurring charges
5. Continue creating your Checkout Form

## Additional Features in Max

1. [Upsells on Checkout Forms](#)
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