

Keap Max[®]

This article applies to:

Keap Max combines the ease-of-use and interface of Keap with many of the powerful features and benefits of Infusionsoft by Keap. Max includes all features and functionality of Pro, such as Appointments, our Keap Business Line, and mobile app, plus the following:

- [Analytics](#)
- [Lead scoring](#)
- [150 custom fields](#)

If you're an Infusionsoft customer that's interested in trying Keap Max, [please complete this form](#).

Infusionsoft by Keap will be known as as **Max Classic** going forward.

What is in Max?

- Complete CRM
- B2B management
- Company records
- Email marketing
- Easy Automations
- Campaign Builder
- Keap Mobile App
- Dedicated business line
- SMS messaging
- Appointments
- Sales pipeline
- Forms
- Landing page builder
- Checkout forms
- Invoices
- Quotes
- Payments
- Lead scoring
- Analytics

- Reports
- Custom dashboard
- Lead source tracking (coming soon)
- Round robin (coming soon)
- Recurring payments (coming soon)

What is not in Max?

- My Day
- Opportunity Records
- Affiliate referral tracking
- Shopping cart
- Niche campaign goals and sequences*

Is Max right for you?

Customers who should try Max...

- Excited about a modern and easy to use interface and user experience
- Need additional CRM tools that are integrated in the app such as Appointments, Keap Mobile, Dedicated business line and SMS messaging
- Looking for an easy way to automate your business with Easy Automations
- Selling services online with Checkout forms and Payments
- Still want the power and customization of Infusionsoft with Campaign Builder, Lead Scoring, Sales Pipeline, Checkout Forms, Company Records and Analytics

Customers who should stay on Max Classic...

- Enjoy niche features such as My Day and affiliate referral tracking
- Utilize the Shopping cart for their ecommerce business
- International customers
- Manage a large sales team
- Sell subscription products

What will change in Max Classic (formerly Infusionsoft)?

Nothing will change in Max Classic except the product name and logo. All of the

features, functionality and data will still be the same as when it was named Infusionsoft.

When will the name change to Max Classic (formerly Infusionsoft)?

Infusionsoft will be renamed to Max Classic officially beginning February 1, 2021. At this time, your edition SKU and billing statement will reflect the name change. The website will also be updated at this time.

When will additional information be released?

We will be communicating these changes with our customers over the next few weeks. A dedicated landing page will be available to all customers to learn more about Max and request to try it in app.

How to switch to Max

If you would like to try out Max, please contact your CSM and they can switch your edition from Max Classic to Max at no additional cost. You can also [complete this form](#). If you would like to upgrade from Pro to Max, there will be an additional monthly fee.

Feature and functionality comparison

The power of Infusionsoft is now available in Keap plus additional integrated CRM tools that are not currently available in Max Classic.

Additional Keap features available in Max:

- Appointments
- Keap Mobile App
- Dedicated business line
- SMS messaging
- Easy Automations
- Calendar sync (Google / Outlook)
- Checkout forms
- Google reviews

Features not available in Max (only in Max Classic):

- My Day

- Opportunity Records
- Affiliate referral tracking
- Shopping cart
- Niche campaign goals and sequences*

Data Migration

Most of the powerful features that you use daily in Infusionsoft are available in Max and your data will transfer seamlessly. However, there are some niche features in Max Classic that will not be available on Keap and corresponding data will need to be re-entered.

Data will transfer for the following features:

- Contact Record
- Company Record
- Tasks
- Notes
- Lists and saved searches
- Tags
- Custom fields
- Emails
- Campaigns
- Invoices
- Order records

Data will not transfer in the following areas:

- Contact record
 - Contact type
 - Sent email history
- Custom fields
 - SSN field
 - Categories with subcategories
- Order records
 - Tax and discounts
- Activity Feed
- My Day
- Opportunity Records

- Sales Pipeline stages
- Appointments
- Niche campaign goals and sequences*

*The following Campaign Goals are not accessible in Keap Experience:

Landing Page Submitted, Note Applied, Internal Forms, Lead Score Achieved, Product Purchased, Opportunity State Moved

*The following Sequence Processes are not accessible in Keap Experience:

Voice, Fax, Action Set, Letter, Fulfillment List, Create Opportunity
