

Solution Launchpad - Understanding Compatibility Across Editions

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What is Edition Compatibility?

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The most common request we hear from partners regarding Solution Launchpad users is "I just want to know what will install across editions."

Solution Launchpad expands upon the previous content sharing solution and allows you to export and bundle items that you created from your primary app and any sandbox you have access to. With the expansion of capability, it is important to understand what assets will work with different editions of Keap.

The tables below reference the compatibility with assets at the time of install in the following ways:

This item is compatible with a specific edition

⚠ This item is compatible, but may require additional setup / throw errors if certain conditions aren't met

This item is not compatible with a specific edition

We have also provided an exceptions / notes column to give any additional context as you are creating bundles

Stand alone assets

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Tags					
Custom Roles and Permissions					
Email Broadcasts (new builder)					
Custom Fields					When a custom field of the same name and different type exists in the destination app, the installing user will get an error explaining the conflict and the installation will fail. When the installing user has exceeded the limit for a particular custom field, the user will get an error explaining the limit, and the installation will fail

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
New Landing Page					Users will get a validation message if they are in Pro AND there are more than 2 pages in a landing page.
Convrrt Landing Page					Paid convrrt add-on required to have proper functionality. Current install will fail if the add-on is not added to the receiving users account.
New Email Builder Saved Templates ("My Templates" in the email builder)					Only the body content shares today. Subject line and pre-header text is not part of the saved template, instead it's part of an automation or broadcast where the template is used.
New Internal Form					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
New Public Form					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
New Appointments					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
Landing Page Popups					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
Visual Pipelines					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Coaching Portal Plays					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate. Testing behavior before distributing to clients is strongly encouraged as many "Internal Link" options for plays are different between Pro, Max and Ultimate. Please ensure all links work in the intended edition before distributing.
Easy Automations			⚠		Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate. Easy Automations installed in Ultimate will still work, but may provide unexpected results and you won't be able to visually edit them.
Checkout Forms	⚠				Checkout forms featuring a promo code will not be installable to Pro apps.
Text Templates					Currently not enabled for users.
Saved Searches	⚠		⚠		Currently in alpha with 2-3 partners as we work through compatibility concerns. Extreme caution is required to ensure search criteria will work in the destination app's edition.

Advanced Automation

There is a lot under the hood with Advanced Automations. Initially, this is all that was available to export and share. We have broken the Advanced Automations documentation into two sections. First we will look at Triggers or "When's" and then we will look at Actions or "Then's." The format is the same as above, and the exceptions / notes have been provided to give you any needed context.

Triggers or “When’s”

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Tag is applied					
Email link is clicked					
API trigger					
Quote status changes					
Landing page (new builder)					
Wordpress Opt-in					
Legacy Web Form is submitted					
Product is purchased					Product category only. Product name does not share over.
Failed purchases					Products are not supported, and any referenced products will be removed from the solution during cloning.
Pipeline stage is moved					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
Lead score is achieved					Pro users will see a missing features error referring to lead score, and the install will fail.
Notes on Automation Canvas					Notes created in legacy automation builder may appear with broken formatting in new automation builder, and vice-versa. Classic users may need to switch to Ultimate and New Automation Builder in order to see notes correctly.
Task is complete	⚠	⚠	⚠	⚠	Task outcomes do not get copied. This trigger and the relevant create task action will require re-configuration.
Note is applied					Note applied trigger not compatible with Pro/Max editions.

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Create Appointments [legacy]					Pro/Max users will see an error explaining the missing feature, and the install will fail.
Internal Form is submitted [legacy]					Users will see an error referring to missing "Keap Ultimate Automation Builder" features, but does not specify the legacy internal form is the issue.
Opportunity stage moved [legacy]					Users will see a missing features error referring to legacy opportunities, and the install will fail. Opportunities defaults, custom fields, and custom win/loss reasons are not copied.
Action sets [legacy]					This feature will not be available in Solution Launchpad

Actions or "Then's"

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Apply or remove tag					
Send email (new email builder)					
Get email opt-in					
Apply a note					
Empty sequence					
Add or remove from sequence					Adding to a sequence in a different campaign may produce errors or unexpected results.
Date timer					Receiving user should verify time (if applicable) is properly reflected for their time zone.
Delay timer					Receiving user should verify time (if applicable) is properly reflected for their time zone.

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Appointment timer (new appointments)					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
Create deal					Install is allowed on classic, but it cannot be used or located unless the user toggles to Ultimate.
Create an invoice			⚠	⚠	Use caution when sharing across editions. Pro/Max do not support auto-charge payment options, and will show up un-configured. “Create Order” in classic / ultimate get converted to “Create Invoice” in new automation builder, along with pro/max. Use caution and ensure relevant functionality works as expected before sharing with clients.
Assign an owner ('Round Robin')	⚠	⚠			Round robins do not get copied. If these are used, the action will require re-configuration in the destination app. When this action set to round robin is installed to pro/max, it will incorrectly appear showing that it's set with a round robin but will not work that way.
Set field value	⚠	⚠			Pro/Max do not support date/time custom fields. If a date/time custom field is referenced by the automation, it will fail installation to pro/max with an error explaining this.

Feature	Pro	Max	Ultimate	Classic	Exceptions / Notes
Field timer	⚠	⚠			Pro/Max do not support date/time custom fields. If a date/time custom field is referenced by the automation, it will fail installation to pro/max with an error explaining this.
Create a task	⚠	⚠	⚠	⚠	Task outcomes do not get copied. This action and any relevant "task completed" triggers will require re-configuration.
Send an HTTP Request	⚠	⚠	⚠	⚠	HTTP requests currently come over empty and need to be rebuilt.
Send text message	⚠	⚠	⚠	⚠	Content of the message does not get copied, but action will install to all editions except free trial.
Create an Opportunity [legacy]			⚠	⚠	Opportunities defaults, custom fields, and custom win/loss reasons are not copied. We are not currently improving the functionality of Opportunities and encourage users to leverage the Deals object in Pro/Max/Ultimate.
Send email (legacy BARD builder)					Currently, users see a warning but can proceed with export/install. However, soon this will be disabled and export/install will fail. (with a clear error message)