

# I just purchased Max Classic and need to set it up for the first time 🔗

This article applies to:

[Max](#)

[Max Classic](#)

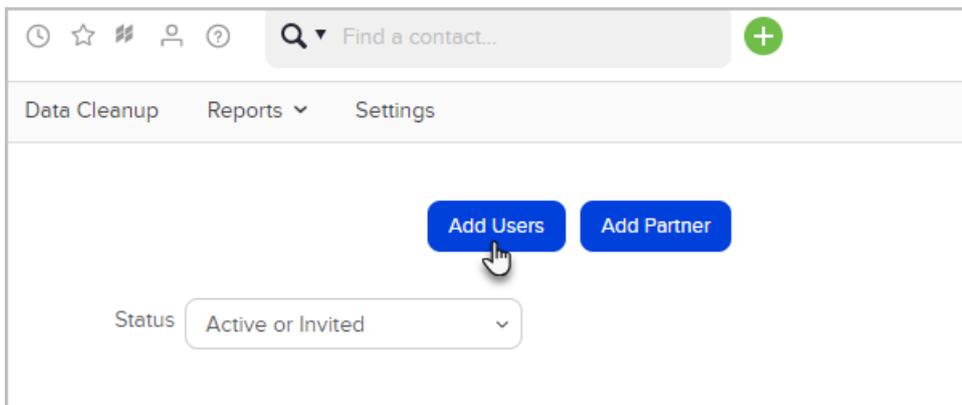
## Review the Basic Getting Started Guide

First, review the [basic getting started guide](#) for all new Max Classic users in order to learn the basic concepts in Keap.

**Please note!** Most of features described in this article require you to have Admin permissions in Max Classic.

## Add or Remove users

Learn how to [invite new users](#) and [remove old users](#) from your Max Classic account (**Admin > Users**).



## Set User Permissions

Max Classic has a very extensive permission structure allowing you to gate users from accessing certain areas or performing certain tasks in Max Classic. If another user in your account says, "Why can't I see X" - it's likely because they don't have permission to do so. Go to **Admin > Users** and click the **Edit Permissions** link to start configuring the permissions for a particular user. You can find an exhaustive list of permissions [here](#).

Here are Top 5 Most Common Permissions That New Admins Change:

- How can my users [see each other's calendars?](#)
- I don't want my users to see [each other's contacts](#)
- I don't want my user to [export lists](#) from Keap
- Why can't my user [add a tag?](#)
- I need to give my user the ability to [edit marketing campaigns](#)

50 ▾ per page

	Status	Permissions
n	Active	<a href="#">Edit Permissions</a>
om	Active	<a href="#">Edit Permissions</a>

## Import Contacts

You can upload your own .csv file or use one of our native import tools to get your contacts into Keap.

1. First, take a look at the [Import FAQ](#)
2. (optional) [Export from your current system](#)
3. [Prepare your csv file](#)
4. [Import Contacts](#)
5. How to [view and rollback imports](#)

## Custom Fields

1. Choose the types of custom field(s) that best fits your needs. [This article](#) will show you how to choose the right field type when you need to store data that isn't native to Keap.

**Dimensions**

Common Inground Pool Sizes

Please select one
▾

Please select one

16'x32' - 19 - 200 Gallons

16'x34' - 20 - 400 Gallons

16'x36' - 21 - 600 Gallons

18'x36' - 24 - 300 Gallons

20'x40' - 30 - 000 Gallons

24'x44' - 39 - 600 Gallons

Tasks
Scored & Recent Activity
Referral Partner Tracking
Follow-Up Sequence

2. Once you've learned about all the custom field types available in Keap, follow [this guide](#) to learn how to create and manage them.

## Segment Your Contacts

Most of the time, tags are create on-the-fly when you are setting up automation. [Click here](#) to learn how to create and manage your tags and tag categories.

**i** You can make multiple Tags by separating the names with commas.

Tag Name

Category

(Other)

Description

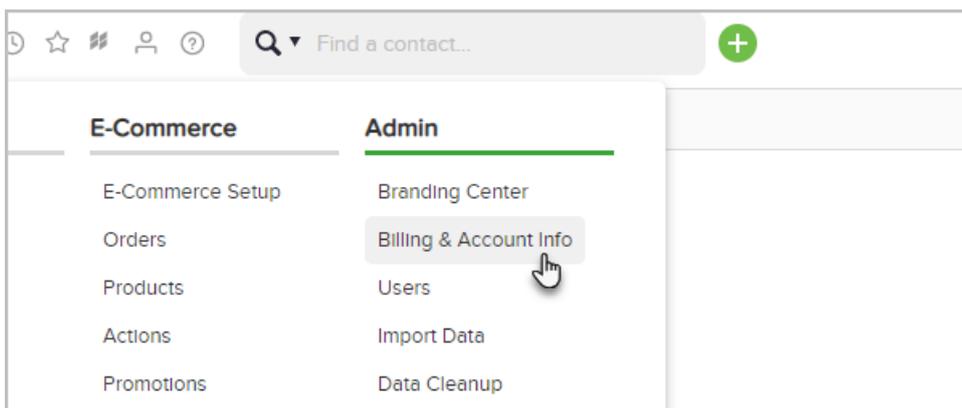
## Set up the Branding Center

There are only a couple things in the Branding Center that will apply to you.: **Uploading your business logo** and configuring a setting that controls **Keap branding in the footer of your marketing emails** . You may have already uploaded your logo when you first set up your Keap account, so this may be an optional step for you.

**Pro-Tip!** Unless you are already using legacy features, you can ignore the **Default Templates** tab.

## Update your Billing Information

[Click here](#) to learn how to make changes to your payment and personal information we have on file for your account.



## Make a Payment on Your Keap Account

Learn how to [make a payment](#) on your Keap account.

## Upgrade Your Account Users Or Contact And Email Levels

Learn how to [add more users, email and contact capacity](#).

