Contact record overview

This article applies to:

Max Classic

Contact Record Overview Video

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Contact Record Quick View Video

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The Top Row of Tabs

The **top row** of tabs stores general contact information and specific details about the contact, like street address, birth date, and more. These details are stored in the default Max Classic fields and in custom fields you create for your specific business needs. The standard and custom field information is added and updated either manually by one of your Max Classic users, or automatically through a web form or online purchase.

- **General:** It stores the most pertinent contact information: company, job title, phone number, email address and website. It also displays a tag summary. There is an envelope icon that opens the email client so you can quickly send a personal email.
- **Address:** You may have more than one address for each contact. The primary address (billing address) is stored in the general tab. You can store up to two more addresses within the address tab.
- **Additional Info:** This tab contains fields for additional phone numbers, birthday, spouse name, etc.
- **Person Notes:** This is a text box where you can add notes about a person that do not need to be date/time stamped.
- **Custom Fields:** You may have many custom tabs; each labeled with a different custom label (in other words, none of them may actually say "custom fields".)
- **Tag:** The tag tab lists the tags applied to this contact record. You can also manually add or remove tags from the contact record. Choose a tag from one of the drop-downs or create a new tag.
- **Linked Contacts:** This tab displays relationships you've established between contacts in your system by linking them together and allows you to create new links (e.g. links between family members.)
- **Access Privileges:** This tab allows a user to share access to a contact record with other users or user groups / teams.

The Bottom Row of Tabs

The **bottom row** of tabs stores activity history like pending tasks or appointments, email correspondence, automated follow up, notes, and transactions.

- **Tasks:** The Tasks tab displays pending and completed tasks, a dates stamped note history, web form submissions, email correspondence and click history, etc. You can also add new tasks, appointments, notes, and send emails from here.

- **Scored & Recent Activity**: This tab displays all of the recent activity recorded within Max Classic. It also houses all activity related to lead scoring.
- Referral Partner Tracking: This section shows if a referral partner is involved with this contact. You can add a referral partner manually while viewing the record, too.
- **Follow-Up Sequences:** This tab shows the contact's follow-up sequence history. The sequences that are active, paused, and / or completed. Most of the time follow-up sequences are automated and require little to no intervention, but you can manually manage sequences from here when needed.
- **Campaigns:** This tab displays campaign sequence activity. The recent history shows up to 25 completed campaign items that occurred within the last 30 days. The upcoming campaign items section shows the sequence items that will take place in the near future.
- **Opportunities:** If your system includes the opportunity component, this tab will store a history of sales interactions, both active and closed.
- **Orders:** If you are processing orders through Max Classic, this tab will house the purchase history. You can also manually manage orders, payments, refunds, and invoices from here.
- **Web Profile:** This is a comprehensive view of this contact's web interactions with you, including any site where the tracking code is in place.
- **File Box:** Use Max Classic for online document storage by uploading contracts, estimates, questionnaires, and more to an individual's file box.

Pro-Tip! Does your screen look different? If your unable to view certain tabs in the contact record, it is likely due to not having the appropriate permissions to view that object. If you are not an admin and can't configure your own permissions, ask someone who has admin access to modify your permissions for you.