

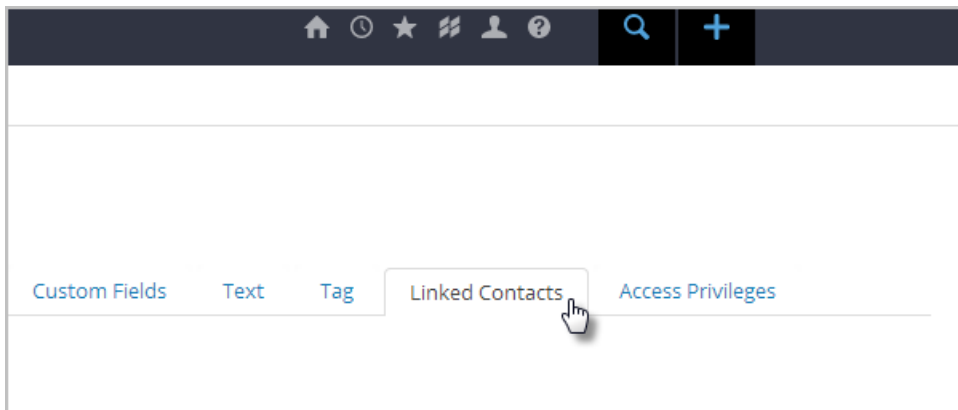
Linked contacts

This article applies to:

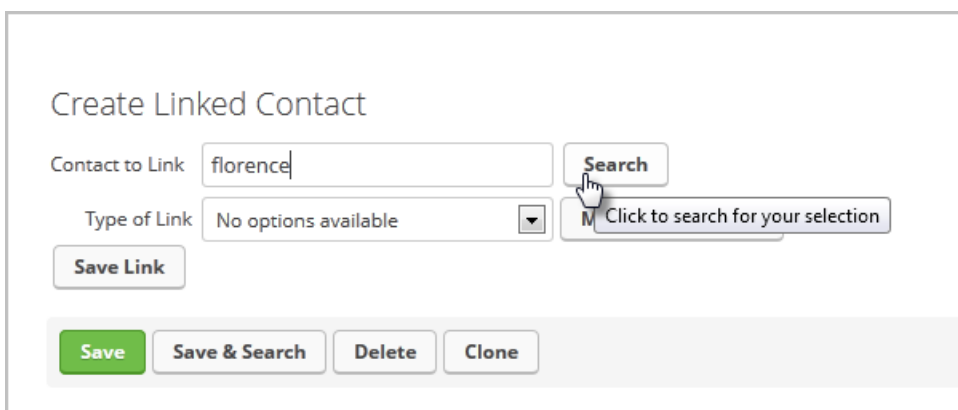
Alert! The Linked Contact feature is only recommended for very specific situations. This feature is rarely an ideal way to group contacts together. **Tags** are the ideal way to group your contacts in Max Classic.

Some businesses need to track non-company relationships, like family relationships and professional service relationships. For example, if you are a real estate agent, you may need to track contacts for the title company, inspection company, mortgage company, etc. If you are a dentist, you may need to track a husband and wife relationship. If you sell software, the businesses you sell to may outsource their IT needs. You can create contact record relationship links in Max Classic.

1. While viewing a contact record, click on the Linked Contacts tab in the top row



2. Search for a contact record to link to this contact. Type the name of the person and click the Search button



3. Select a type of link from the drop-down and click Save. (optional) Click Manage Link Types to create a new type.

Create Linked Contact

Contact to Link Calista (Select a different contact...)

Type of Link Manage Link Types

Save Link

Save Save & Search Delete Clone

- The contact is now linked to the one that you are viewing. You can navigate to the linked contact record, send them an email, or create a task

Linked Contacts

Name	Type	Remove
Jada Casey	CCD	<input type="checkbox"/>

Create Linked Contact

Contact to Link Search

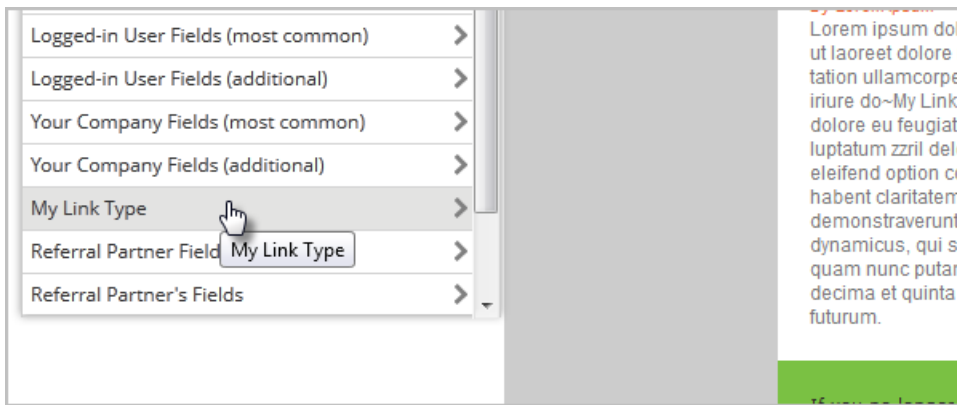
- When composing an email, you can merge a linked contact into the body of the email, or you can cc them by merging their email address in the cc field

Warning! You can only merge the first linked contact per link type. For example, if you had 3 linked contacts under a linked contact type called "Partner", only the first of those contacts would merge.

Linked Contacts

Name	Type	Remove
Scott Leach	Partner	<input type="checkbox"/>
Vladimir Beard	Partner	<input type="checkbox"/>
Dora Reed	Partner	<input type="checkbox"/>

- Click the merge field and select the name of the Link Type that you created



7. Select where in the email you would like to merge the field

8. Click the field that you would like to merge

