Linked contacts

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This article applies to:

Max Classic

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.
4. 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
5. 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.
6. 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