Company record overview

This article applies to:

Max Classic

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Company records are most useful to B2B businesses that need to see a consolidated view of the people and activity related to a company. Company records link together multiple contact records to give you a snapshot view of an account in order to make it easier for you to communicate with the people working for that company. You can add a company name in any contact record. If you are not a B2B business or do not serve larger accounts, you may not need to create company records. Although you can get a consolidated view of account activity through a company record, all of the communications triggered through Max Classic are attached to contact records. You are always communicating with specific individuals within a company.

The company record, like the contact record, is divided into two tabbed sections:

Top Row of Tabs

The top row of tabs stores company contact information, financial summaries, contacts, tags, notes, and (if applicable) custom fields.

Bottom Row of Tabs

The bottom row of tabs store a consolidated history of tasks, appointments, and notes for the people linked to the company record. It also shows all of the opportunities and orders attached to these contacts.