Change Field Labels

Last Modified on 10/30/2024 11:13 am MST

This article applies to: Max Classic

You can customize the standard labels displayed within your Max Classic application. This allows you to repurpose a standard field or use names that are more familiar to you and your Max Classic users. When you change the label for a record or field, it is only a cosmetic change. It does not change the back-end database name that you would use to integrate other systems with Max Classic through the API.

Labels are displayed in the area navigation and drop-downs (e.g., You could change the label "Companies" to "Accounts" or change "Opportunities" to "Deals".)

Field labels are displayed within individual records, like a contact or company record. You can customize field labels to align with address field names for your locale.

ly Nav	CRM	Marketing	E-Commerce	Admin
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Initial Setup	Companies	Email & Broadcasts	Orders	Billing & Account Info
Dashboard	Opportunities	Lead Generation	Products	Users
My Day	Referral Partners	Templates	Payment Setup	Import Data
	Visitors	Dynamic Content	Actions	Data Cleanup
	Zapier Integrations	Legacy	Promotions	Analytics
			Legacy	

1. Go to $\ensuremath{\mathsf{Admin}}\xspace > \ensuremath{\mathsf{Settings}}\xspace$ in the main navigation menu

2. Click on Other application settings



3. The first section on this screen displays a list of system labels. Click on the link for the type of label you want to change (Order, Company, Contact, etc.) The standard field labels are on the left.

	User	Customize systemwide User labels.
	Opportunity	Customize systemwide Opportunity labels.
	Company	Customize systemwide Company labels.
pliance	Subscription Plan	Customize systemwide Subscription Plan la
		Customize systemwide Contact labels.
ttings	Referral Pather	Customize systemwide Referral Partner lab
	Invoice	Customize systemwide Invoice labels.
	Order	Customize systemwide Order labels.
on Rules	Product	Customize systemwide Product labels.

4. Click on the link (e.g. "No Value") next to the record or field label you want to change, and then enter and save the new label name. In the example below, we rename "Company" to "Account."

Manage System Labels				
Record Labels				
Company	Account	[Save][Cancel][Reset]		
Company (plural)	No value	2		
Field Labels				
Field	Label			