

CRM overview

This article applies to:

The Customer Relationship Management, or CRM area, contains all the customer related items including contacts, companies, opportunities, referral partners, visitors, and Zapier Integrations. This is where you can see your promoters, raving fans, and those folks that need a little more attention.

CRM Reports Overview

Reporting on your contacts key activities is crucial to understanding the direction of your business, where it is, and where it should be. Here you can review reporting on your Referral Partner activities, as well as Sales metrics driven almost exclusively by your opportunities. With these reports, you get a birds-eye view of how your business is performing.

CRM Settings Overview

CRM settings in Max Classic allow for the configuration of tags, tag categories, lead scoring and custom choices.
