



DATASHEET

# MaxExpress CRM Live Setup Package

| \$199 PLUS \$99 FOR EACH ADDITIONAL USER

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# MAXEXPRESS CRM LIVE SETUP PACKAGE

THE MAXEXPRESS CRM LIVE SETUP PACKAGE WILL HELP YOU GET STARTED AND SET UP QUICKLY, WITH TIME SAVING TIPS THAT HELP YOU FOCUS ON YOUR BUSINESS AND SERVING YOUR CLIENTS.

A Maximizer CRM Advisor will provide you and each of your team members with:

## SITE SETUP (APPROX. 1 HOUR)

### STRUCTURE OF MAXIMIZER CRM AND HOW TO NAVIGATE YOUR WAY AROUND

How to set User preferences.

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How to create Appointments and Tasks.

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How to create Notes and Documents.

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How to create Opportunities.

### OVERVIEW OF THE PRIMARY CRM LIVE COMPONENTS

Custom Fields

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Key Fields views

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Saved Searches

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Dashboards

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Actions Plans

### ADD-IN AND MOBILE INSTALLATION ASSISTANCE

Assistance with MS Outlook add-on installation, configuration and use.

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Assistance with MS Word add-on installation, configuration and use.



## HELP AND ONGOING SUPPORT

Accessing the CRM Live Quick Start guide.

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How to use the Help Menu.

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Where to find Contextual Help.

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Navigating our YouTube videos.

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Access to Free Public Training Sessions.

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How to access Maximizer Customer Support and Service.

## MAXEXPRESS CRM LIVE PACKAGE OPTIONS:

**Recommended:** Maximizer User Essentials Training Session covers the product's extensive data points, Action Plans and Dashboards. Learn from our experts in a dedicated session to drive the efficiency within your team. Approximately 100 minutes in length, and up to 3 attendees per session. **\$399**

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Conversion of large on premise Maximizer CRM Database (5GB or larger). **\$199**

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Consolidation of up to 3 on premise Maximizer CRM databases or Address Book. **\$499**

- Each Additional Maximizer CRM Address Book to Combine. **\$199**

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Import of additional data (Contacts, Companies) from a CSV file that has up to 30 discrete columns of data, and less than 12,000 records of company, contact or opportunity. **\$499**

- Additional Data Import services are available. Please call for a quote.

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CRM Live Solution Configuration Assistance per hour. **\$225**

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Upgrade from V10 or more recent version of Maximizer CRM. **FREE**

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Upgrade of Maximizer versions V6.0 to V9.0 to current version of Maximizer CRM. **\$399**

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Upgrade of Maximizer versions V1.0 to V5 to current version of Maximizer CRM. **\$1299**

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New to Maximizer 3rd party application data migrations are available for ACT! Goldmine, MS CRM, Salesforce. **STARTING FROM \$1600**

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Extended Hours Delivery (Overnight or Weekend) *\*Subject to Availability\** **\$499**

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24 hour rush installation. *\*Subject to Availability\** **\$249**

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For on-premise deployments, please see the MaxExpress Installation or Upgrade package for details. **\$999**

## MAXEXPRESS INSTALLATION NOTES:

**1** The MaxExpress engagement must be completed within 3 months from initial purchase or it is considered complete.

**2** Scheduled sessions cancelled within 24 hours will be charged a re-scheduling fee of \$200.

**3** Sessions are conducted virtually using Citrix Go to Assist to complete the guided installation remotely.

**4** On premise implementations will also require a MaxExpress installation or Upgrade Package.

**5** Additional Data Import services, conversion from other CRM or contact management solutions are available. Please contact your account manager for a quote.

**6** Extended Hours Delivery and 24-hour rush installation are subject to Consultant availability. 24-hour rush available on standard working days (Monday to Friday) only.

## About Maximizer

### Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/any-time mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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