

MaxExpress Professional Services

MaxExpress CRM Live Lite

\$599

The MaxExpress CRM Live Lite Package will help you to get your team up and running quickly. Your expert CRM advisor will configure your system and provide the essential initial training for your team to be successful.

This professional services package will ensure that your system is set up properly from the start — as quickly and efficiently as possible.

Working with your Maximizer CRM expert advisor, the package consists of the following services:

- A one (1) hour training session on the Maximizer CRM Live user interface.
- Business objectives capture session for mapping to the Maximizer CRM Live system.
- Identification of key processes to be supported by Maximizer CRM Live.
- Configuration based on the business objectives:
 - Set up of two (2) users
 - Assistance in creating five (5) User-Defined Fields to track your businesses unique data points and how to set up default entries for quick data entry of standard information
 - Assistance creating a new column view using one or more of the new User-Defined Fields
 - How to run a basic search and report to access your information
- Continuous knowledge transfer during the session from a Maximizer CRM advisor on best practices for using Maximizer CRM.
- Dedicated time for your questions on how to best use Maximizer CRM in your environment
- One (1) pre-scheduled follow-up 15 minute phone call with your CRM advisor over the following 30 days to answer any new questions.
- Data Import
 - Import of data from a CSV (Excel) file with up to 20 fields and less than 5,000 records

MaxExpress CRM Live Options

2 hour Maximizer CRM Live User or Team Training Session	\$399
Conversion of on-premise Maximizer Database to CRM Live (< 2 GB)	\$499
Import of additional data from a CSV (Excel) file, up to 30 fields or less than 10,000 records of company, contact or opportunity data (Additional Data Import services are available. Please call for a quote)	\$299
24 hour rush installation	\$249

MaxExpress Notes:

1. The MaxExpress engagement must be completed within three months from initial purchase.
2. Scheduled sessions cancelled within 48 hours will be charged a re-scheduling fee of \$200.
3. Sessions are conducted virtually using Citrix Go to Assist or equivalent screen sharing solution.
4. Network access from the Internet must be available.
5. Documents are excluded from Maximizer on-premise conversion option.
6. Additional Data Import services are available. Please call for a quote.

Maximizer Software
Simply Successful **CRM**

Call: 1-800-804-6299

Email: sales@maximizer.com

Web: www.maximizer.com

Americas

604-601-8000 PH
604-601-8001 FAX

info@maximizer.com

www.maximizer.com

Europe, Middle East

+44 (0) 845 555 99 55 PH
+44 (0) 845 555 99 66 FAX

info@max.co.uk

www.max.co.uk

Australia, New Zealand

+61 (0) 2 9957 2011 PH
+61 (0) 2 9957 2711 FAX

info@maximizer.com.au

www.maximizer.com.au

Asia

+(852) 2598 2888 PH
+(852) 2598 2000 FAX

info@maximizer.com.hk

www.maximizer.com.hk
www.maximizer.com.cn