

MaxExpress Professional Services

MaxExpress Installation

\$999

The Maximizer CRM 12 MaxExpress Installation Package will help you to get installed and oriented with the confidence of a professional install so you can focus on your business.

Working with your Maximizer CRM expert advisor, this professional services package will ensure 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:

- Guidance through the Maximizer server installation of Maximizer CRM components for one (1) access method of your choice (Windows, Web or Mobile).
- Guidance through known considerations when installing dependent components.
- Assistance in the installation of a client workstation for the access method of your choice. The knowledge transfer conducted ensures that you can independently set up all of your workstations.
- An orientation to the Maximizer CRM 12 user interface.
- 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 best to 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.

MaxExpress Installation Options

Install additional server-side access methods (Windows, Web or Mobile)	\$149 each
Assistance with additional client installs (1 included)	\$79 each
Add a new MaxExchange Installation (training, 1 server & 1 client)	\$749
Add additional new MaxExchange clients (Laptops)	\$199 each
Upgrade an existing MaxExchange installation (server & 1 client)	\$449
Upgrade additional MaxExchange clients (Laptops)	\$129 each
Conversion of data from a non-SQL Maximizer database	\$299
Import of data from a CSV (Excel) file, 30 fields or less < 10,000 records (Additional Data Import services are available. Please call for a quote)	\$399
24 hour rush installation	\$249

MaxExpress Installation Notes:

1. The MaxExpress engagement must be completed within three months from initial purchase.
2. Scheduled sessions cancelled within 24 hours will be charged a re-scheduling fee of \$200.
3. Wireless Access (for mobile CRM) and Web Access requires an external facing configured Web Server in the corporate environment where the Maximizer database server is located.
4. Sessions are conducted virtually using Citrix Go to Assist to complete the guided installation remotely.
5. Network access from the Internet must be available. Server and client operating systems must be installed and administrator accounts available to your Maximizer CRM Advisor.
6. Upgrades from Maximizer CRM 6 and earlier are available on a time and materials basis.

Maximizer Software
Simply Successful **CRM**

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