



Maximizer CRM

Professional Set up package

Only £1499.00*

Our Maximizer CRM Professional up package has been designed for businesses that are focused on both core CRM functionality and also simple and effective integrations.

What's included;

- A 2 Hour Database Configuration Workshop – to include
- Plan User Defined Fields (up to 60)
- Our Unique GDPR Build, including both fields and dashboard indicators
- Dashboards for Sales (up to 12 indicators)
- Column set up (up to 4)
- Leads Pipeline
- Sales Pipeline (up to 2)
- Quick Searches (up to 6)
- Security Groups (up to 2)
- A full write up of the workshop means you know exactly what is planned

- Up to 3 Zapier integrations are fully supported for the next 12 months.
- Please note a paid Zapier account may be required Unimax Solutions do not provide this

- Database Build as per the above document once agreed

- MS Outlook set up for 1 key user, Video guide and How-To guide

- Basic User Training via an online session for up to 2 users (additional training can be purchased if required).
- Basic Maximizer walkthrough including how to change a password
- The Types of Address book entries
- How to Add and Edit new Address book Entries – Including how to use any User Defined Fields
- A walkthrough of the Leads module
- How Opportunities work
- How to Add and Edit new Sales Opportunities – Including how to use any User Defined Fields
- The Sales Process and how to manage this
- Saving Documents and adding Notes
- Saving Emails
- Setting up Hotlist items and managing the Hotlist
- How to use the Calendar, Adding and Editing appointments
- Dashboard Walkthrough

- An initial 12 months remote support for 1 key user (we advise that you have at least 1 user in every 5 supported, additional support can be purchased if required).

*Please Note all prices are +VAT

