



Maximizer CRM Basic Set up package

Only £899.00*

Our Maximizer CRM Basic Set up package has been designed specifically for small businesses who are looking for a simple start to CRM designed to grow with their business from day one. Working with you closely to ensure that you get the right customizations and indicators to drive your business in the right direction, whilst focusing on the customer information that is most important.

What's included;

- A 2 Hour Database Configuration Workshop – to include
- Plan User Defined Fields (up to 40)
- Our Unique GDPR Build, including both fields and dashboard indicators
- Dashboards for Sales (up to 8 indicators)
- Column set up (up to 2)
- Quick Searches (up to 4)
- A full write up of the workshop means you know exactly what is planned

- Database Build as per the above document once agreed

- 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 of 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

