



Quote quicker with Maximizer Quotes



Streamline your quoting process

Does your sales team spend a lot of time creating customer quotations? And how about your service team? Do you want to free up their valuable time spent on admin so they can focus on more important tasks?

Perhaps your business generates a high volume of quotes daily/weekly/monthly that are prone to errors with the wrong contact details, address, tax rates?

Then Maximizer Quotes is just what you need. Saving data entry and reducing the risk of human error, Maximizer Quotes takes the header information from Maximizer CRM and creates a quote. Simply add the products and/or services, set the discounts safe in the knowledge that the tax rates, currencies, payments terms and so on have been configured to your specific business needs.

Choose from two great value options:

Stand-Alone - our Maximizer Quotes tool has been written as a generic quoting tool for Maximizer and can be configured to your business.

Integrated with Accounts - take Maximizer Quotes and add a small integration with your accounting/ERP software.

Compatible with both Maximizer CRM Cloud and Maximizer CRM On-Premise.



Features:

- > Create quotes straight from Maximizer CRM against Address Book, Opportunity or Customer Service records.
- > Update quotes seamlessly.
- > Generate professional quotations quickly and easily.
- > Review your quote's profit analysis ensuring suitable margins.
- > Close off quotes: convert or lose options.

Configured to your business:

- > Products/Services: Manually add or import from a spreadsheet. Make global changes by exporting then reimporting e.g. 10% price increase.
- > Set up Price Lists, Product Tax Rates, Customer Tax Rates.
- > Manage Currencies, Payment Terms, Product Types, Units of Measurement.
- > Group products by Category.
- > Template management: Design different templates using our base template e.g. quotes, order confirmations.

SALES TEAMS THAT USE
ADVANCED CRM FEATURES SEE A

10% SALES UPLIFT
POTENTIAL ↑ £

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