



**Maximizer Connect for Excel Quotes**

# Getting Started Guide

for Maximizer CRM Live

Published By |



## Prerequisites

### Microsoft Excel

Maximizer Connect for Excel Quotes works with Excel 2013 or 2016 desktop versions on Windows OS (Mac OS is not supported). It is recommended you install the latest update for Microsoft Office.

### Internet Explorer

Microsoft Internet Explorer 11 or later must be installed, but does not have to be your default browser.

The following sites will be added as the trusted sites in Internet Explorer by the add-in installer. Please don't remove them.

<https://ajax.microsoft.com/>

<https://ajax.aspnetcdn.com>

<https://appsforoffice.microsoft.com/>

<https://ca1.maximizercrmlive.com>

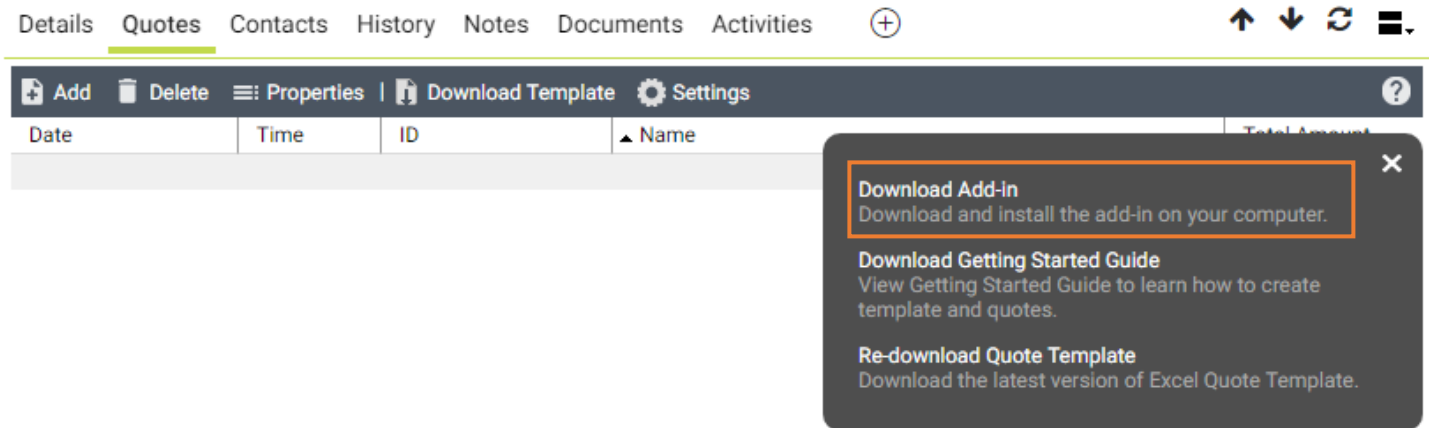
<https://caw.maximizercrmlive.com>

## Getting Started

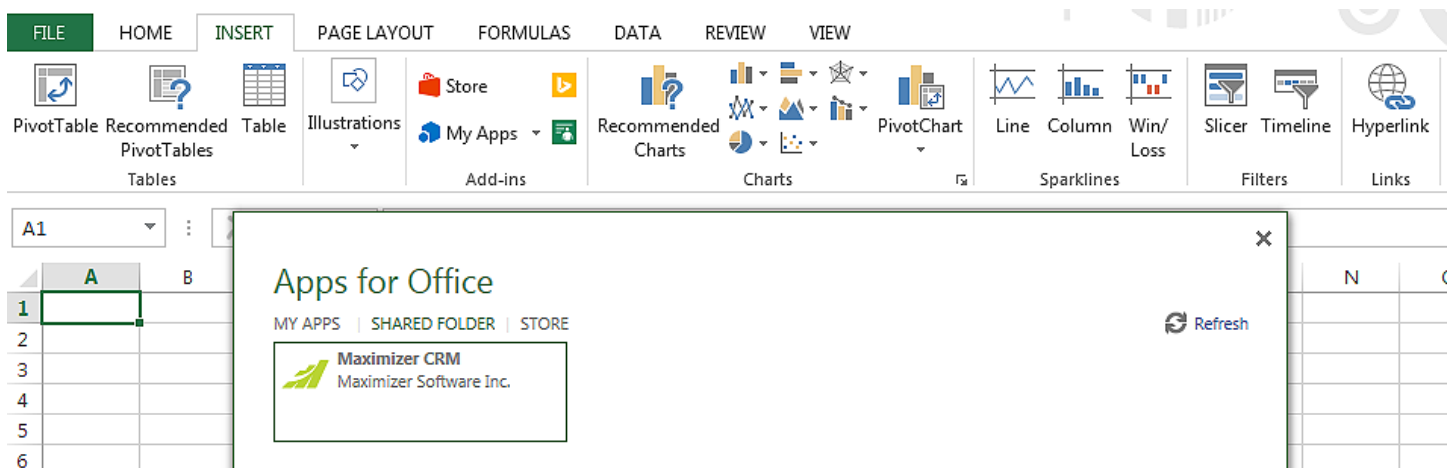
Maximizer Connect for Excel Quotes is accessed via the new Quotes tab in Opportunities module in Maximizer CRM Live, and requires that all users install the Maximizer Excel Quote add-in.

### Excel Add-in for Maximizer

From within the new Quotes tab in the Opportunities module, press the Help button, and select Download Add-In to begin. The installation file will be downloaded. Run the installation and follow the step by step wizard to install the add-in on your computer.



To confirm that the add-in has been successfully installed, you will find the Maximizer Excel Quote add-in in Excel Insert tab in the Ribbon bar > My Apps > Shared Folder tab.

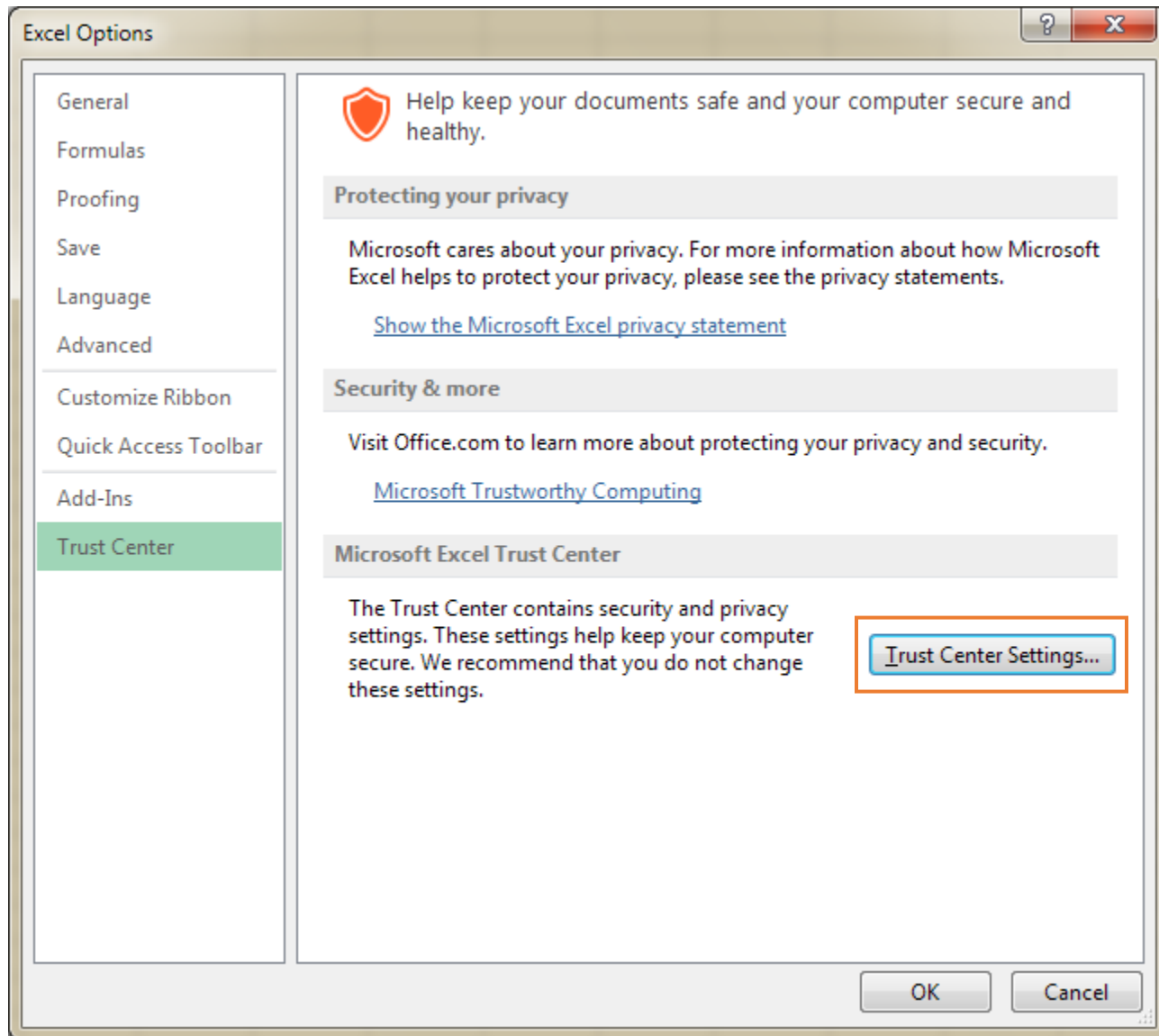


**NOTE:** The instructions as outlined on pages 4-11 outline the Maximizer Connect for Excel Quotes set-up process for your Maximizer Administrator. If you are not the Maximizer Administrator, please skip forward to page 12.

In some companies, the IT team will install add-ins on each user's computer. If someone else installs the Maximizer Excel Quote add-in on your computer, you won't see the add-in in the Insert Tab of the Ribbon bar > My Apps. You need to add the Trusted App Catalog first.

### Add Trusted App Catalog

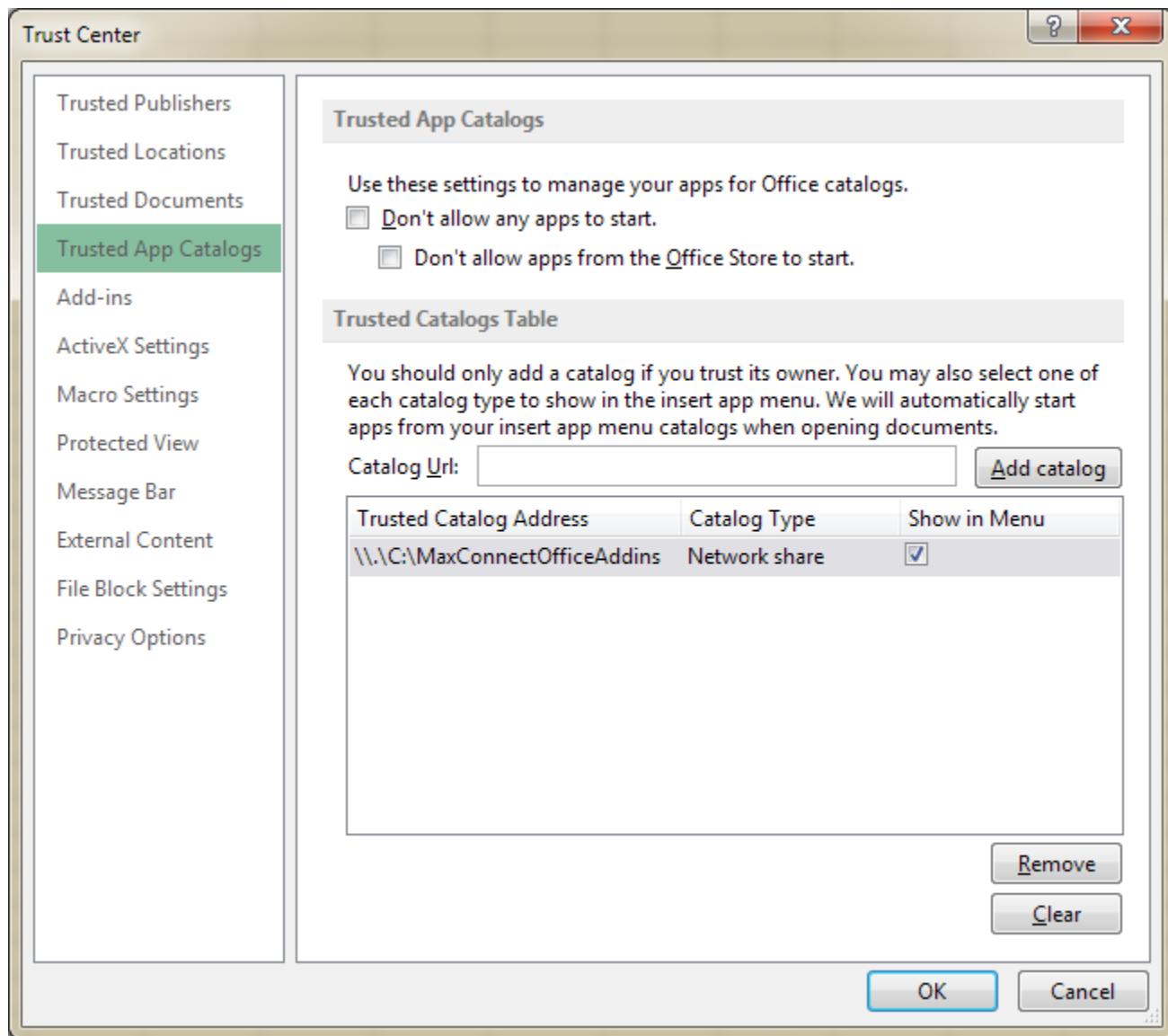
Open a new Excel file, go to the File menu and select Options. In Excel Options dialog, click Trust Center tab in the panel and press Trust Center Settings button.



In Trust Center dialog, click Trusted App Catalogs tab. Enter the following URL into the Catalog URL field:

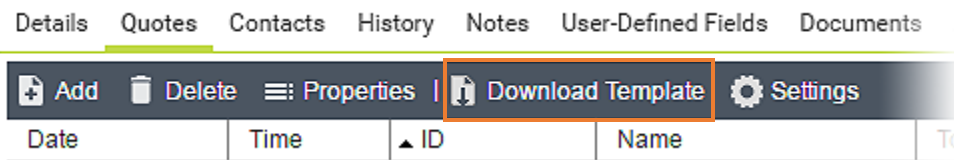
[\\.\C:\MaxConnectOfficeAddins](file:///C:/MaxConnectOfficeAddins)

Press Add Catalog button. Make sure to check Show in Menu option. Press OK button.



You will find the Maximizer Excel Quote add-in the Ribbon bar > My Apps > Shared Folder tab.

## Setup Quote Template

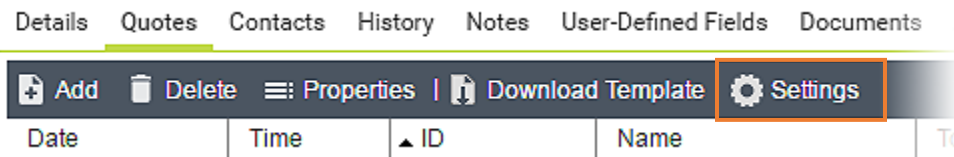


**Your Maximizer Administrator needs to set up the Quote Template so all Maximizer users in your company will use the same template to create quotes.**

In the Quotes tab, press the Download Template button to download the built-in template and modify it to fit your business needs. After editing is complete, the template needs to be saved back into Maximizer. The Administrator can also create a template from scratch. Find more information about creating / editing Quote Template in next section, Setup Template.

**Note:** Only one template is available for each Maximizer CRM Live site. Before the template has been setup, the Add, Delete, and Properties buttons are disabled.

## Settings for Quotes

A screenshot of the 'Settings' dialog box. The dialog has a title bar 'Settings' with a close button. Inside, there is a section 'Quote status:' with a list box containing 'Abandoned', 'Accepted', 'Expired', and 'In Review'. Below the list box are three buttons: 'ADD', 'MODIFY', and 'DELETE'. Below these buttons, there are three input fields: 'Default # of days before expiry:' with a value of '15', 'Quote ID prefix:' with a value of 'QUO', and '# of digits for Quote ID:' with a value of '5'. Below these fields, there is a text label 'Sample Quote ID: QUO00001'. At the bottom of the dialog are two buttons: 'OK' and 'CANCEL'.

The Administrator can edit the settings for the quotes. In Quotes following tab, press the Settings button to open the Settings dialog. The following fields are available in the dialog:

### Quote Status

The Administrator can add, modify or delete status. The status will be available when creating or editing a quote.

### Default # of days before expiry

Default value is 15 days. When creating a quote, the expiry date will be calculated automatically based on this setting.

### Quote ID prefix and # of digits for Quote ID

These two fields define how the Quote ID will appear.

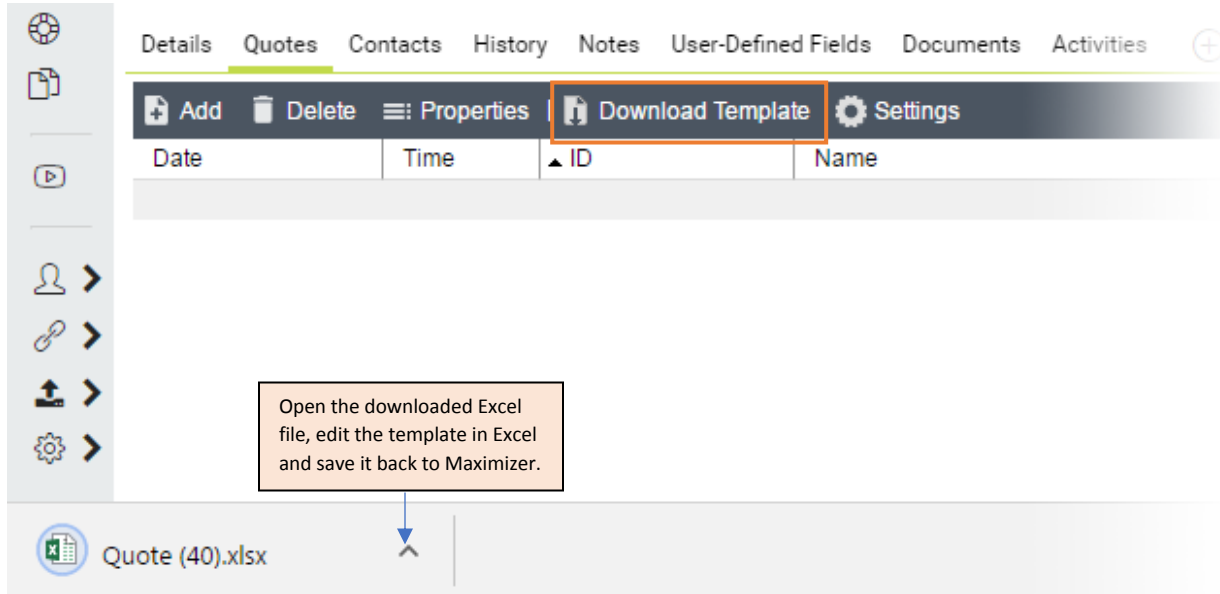
*Download Template and Settings buttons are visible only if the login user is the Administrator*

## Setup Template

Before you can create quotes, you need to setup the Quote Template. There are two ways to create the template: modify the built-in template or create a brand new template from scratch. **Note that you need to have Administrator rights to setup the template.**

### Modify the Built-in Template

Click the Download Template button in the Maximizer Excel Quotes tab, and the Excel file for the built-in template will be downloaded.



Open the file in Excel. Since the file is downloaded from the Internet, you may see a warning about the Protective View in Excel. Press Enable Editing button.

### Maximizer CRM

**QUOTE**

Maximizer Connect for Excel Quote add-in allows you to create or modify quotes for the opportunities in Maximizer. To access the add-in, press the Login button below. you need to provide your Maximizer CRM Live account name, user ID and password.

LOGIN

**Account name**  
Maximizer CRM Live account name is your database name. If you access Maximizer with the following URL, "https://caw.maximizercrmlive.com/SomeName", your account name is "SomeName". Just enter your account not the full URL.

Within Maximizer, access "Administration/Desktop and Mobile Setup", to view a URL that has your account name.

The Maximizer Excel Quote add-in will be displayed in the add-in panel in Excel.

**Please note:** You will need to press the LOGIN button in order to connect your Quote Template to Maximizer. You will be prompted to enter your Maximizer CRM Live account name, your user ID and password. The Login dialog will be open in Internet Explorer.

**SETUP TEMPLATE****EDIT LAYOUT**

Select a field to be placed into the template

Name and Address

This field displays the name and address of the Address Book entry that is associated with an opportunity. You need to specify a range of 5 cells in the template for displaying the name and address.

Link the selected field with a cell in Excel:

B8:B12

Type in the cell number (e.g. G15) and press the SET FIELD LOCATION button. The value of the selected field will be merged into the cell when creating a quote.

SET FIELD LOCATION

**SAVE TEMPLATE**

Press SAVE TO MAXIMIZER button to save the template into your database. Other people in your company will be able to use the template to create quotes.

SAVE TO MAXIMIZER

Login user: Joe Napoli [LOG OUT](#)

After login, the SETUP TEMPLATE tab will be available for you to modify the layout of the template.

In this release, the following fields are supported in the template:

- Name and Address
- Opportunity Objective
- Quote #
- Revision #
- Date
- Expiry Date
- Total Amount
- Opportunity ID

Each field is linked to an Excel cell. If you want to display the field in a different cell, select the field from the drop-down list, enter the Excel cell number in the text field below the list and press SET FIELD LOCATION button.

For Name and Address field, you need to specify a range of 5 cells in Excel. For example: B8:B12.



In the template, enter your company name and contact information. You can set up a product catalog using the built-in Products sheet. Enter the information about the products, including SKU, description and unit price in Products sheet. After you finish editing the products, you can hide the Products sheet so other users won't be able to modify the product information.

[illegible]

**Note:**

**Make sure to press the Enter key or click in another cell after entering or changing value in a cell.**

**The Quote tab and Config sheet must exist in order for the template to work. You should never change these sheet names. You should not change anything in the Config sheet as its content is restricted for use by the add-in. You can hide the Products and Config sheets so the users will only work in Quote sheet and won't be able to make changes in these two sheets.**

Once you finish editing the template, press **SAVE TO MAXIMIZER** button in the add-in panel to save the template back into Maximizer. It will be ready for other users in your company to create quotes.

If you need to modify the template again, download the template from Quotes tab in Maximizer, modify it in Excel and save the updated template back into Maximizer. You may make a mistake in your template and accidentally upload it to your Maximizer site. If your template doesn't work anymore, you can re-download the built-in template. From within the Quotes tab, press the Help button, and select Re-download Quote Template.

Details
Quotes
Contacts
History
Notes
Documents
Activities

Add
Delete
Properties
Download Template
Settings

Date	Time	ID	Name	Total Amount

Download Add-in  
Download and install the add-in on your computer.
Download Getting Started Guide  
View Getting Started Guide to learn how to create template and quotes.
Re-download Quote Template  
Download the latest version of Excel Quote Template.

## Sample Ready Quote

Maximizer Service Inc.

208 West 2nd Ave, Vancouver  
604-601-8000  
[www.maximizer.com](http://www.maximizer.com)

Date: May 30, 2017  
Expiry Date: June 14, 2017  
Quote #: QUO00060  
Revision #: 0  
Opportunity ID: 1705102522115877339600

PREPARED FOR:  
Ed Johnson  
ABC Company  
1000 West 2nd Ave Room 200  
V2V 3M3

PREPARED BY:  
Joe Napoli  
604-601-8001

DESCRIPTION:  
Purchase two bikes and parts

ITEMS:

SKU	Description	Unit Price	Quantity	Cost
1234	Product 1 and Description	100	1	\$100.00
2345	Product 2 and Description	200	1	\$200.00
Subtotal:				\$300.00
Sales Tax:				7%
Discount:				10%
Shipping:				\$100.00
TOTAL:				\$388.90

Maximizer CRM

MODIFY LAYOUT
QUOTE

CONTACT INFORMATION:
UPDATE

Ed Johnson  
ABC Company  
Main: 604-601-2222  
Fax: 604-601-2223  
Cell: 604-601-2224  
Email: jinyu@maximizer.com

QUOTE INFORMATION:
\*Name:
First Draft
Status:
Customer Review
Expiry Date:
June 14, 2017
Comments:

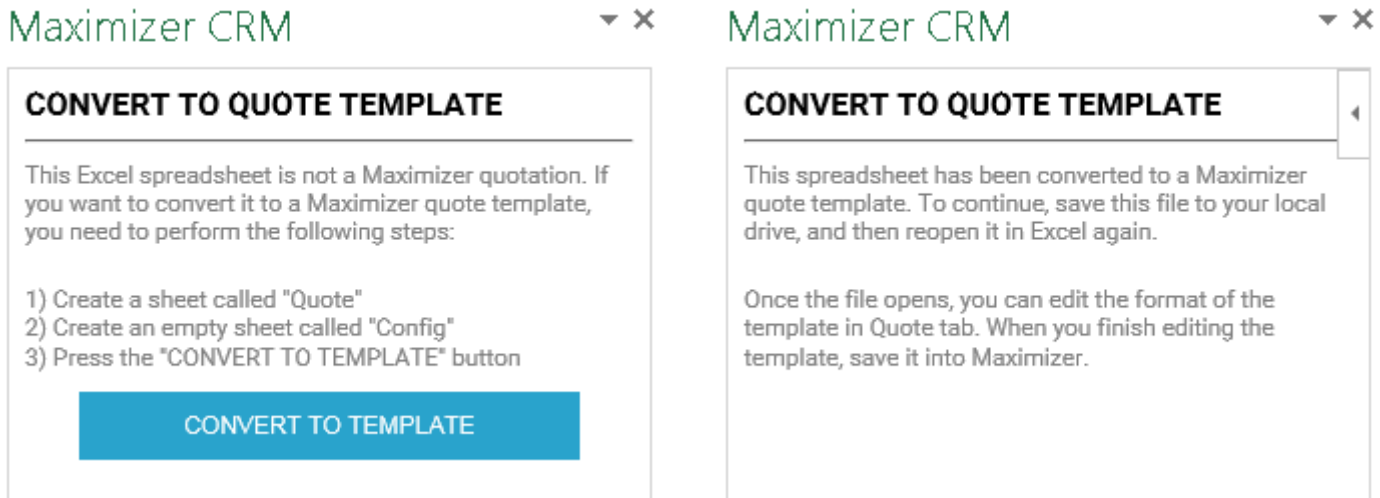
SAVE TO MAXIMIZER
UPDATE OPPORTUNITY

Login user: Joe Napoli LOG OUT

## Using pre-existing Excel Quote templates

If you are already using Excel to create quotes, you can convert your existing Excel-based quotes file into a Maximizer Excel Quote Template.

Open an existing Excel file. Make sure you have the desktop add-in installed on your computer. Go to the Ribbon bar > Insert > My Apps > Shared Folder tab, select Maximizer CRM and press the Insert button. The Maximizer add-in will be displayed in the right-hand side add-in panel.



You need to create two sheets before you can convert the Excel file to a Quote Template.

- **Config sheet** - It will be filled with configuration settings when you press CONVERT TO TEMPLATE button.
- **Quote sheet** – You will setup your Quotation Template in this sheet later.

Once you have created these two sheets, press CONVERT TO TEMPLATE button.

After you convert the Excel file to a template, you will be prompted to save the file to your computer and open it again. When you open the file, you will be prompted to log in to your Maximizer CRM Live site. After login, you will be able to edit the template the same way as modifying the built-in template. You need to have Administrator privilege in order to edit the template.

You need to set location for all the following fields in your template:

- Name and Address
- Opportunity Objective
- Quote #
- Revision #
- Date
- Expiry Date
- Total Amount
- Opportunity ID

After you finish editing the template, save it back into Maximizer.

## Quotes Tab

The Quotes tab will display the quotes created for a selected opportunity. You can add or delete quotes, as well as modify the properties of the quotes.

Details	Quotes	Contacts	History	Notes	User-Defined Fields	Documents	Activities	+	↑	↓	↺	✓
Add Delete Properties ?												
Date	Time	ID	Name	Total Amount	Expiry Date	Status	Creator					
February 7, 2017	1:07 PM	QUO00024-0	First Quote	719.99	February 18, 2017	In Review	MASTER					
February 7, 2017	1:21 PM	QUO00024-1	First Quote (Revised)	2,418.99	February 18, 2017	In Review	MASTER					

### Add

Pressing the Add button will download the Excel Quote Template. Open the file in Excel, edit the quote and save it back to Maximizer.

### Delete

Press the Delete button will delete the selected quote.

### Properties

Quote Properties

Name:

First Quote

Status:

In Review

Expiry date:

February 18, 2017

Comments:

OK

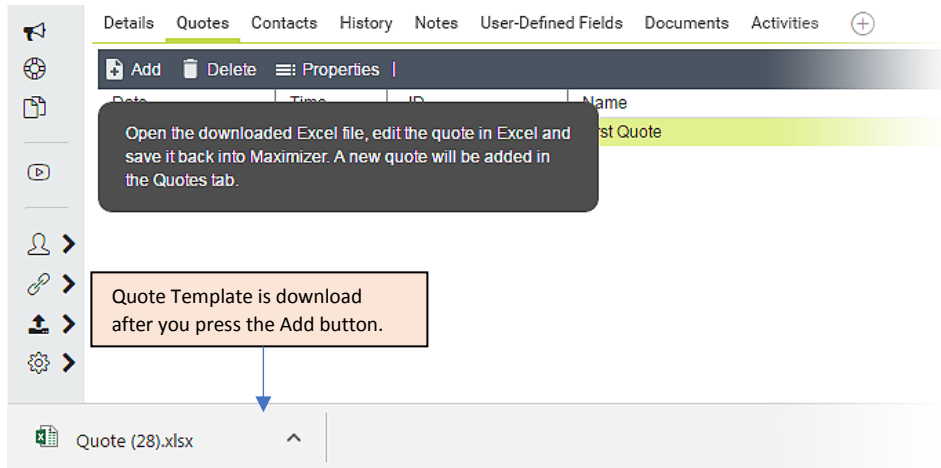
CANCEL

Press the Properties button will open the dialog for quickly editing some of the information about the quote, including Name, Status, Expiry Date and Comments.

For example, if the customer accepts the quote, you can use the Quote Properties dialog to change the status from Review to Accepted, without opening the quote in Excel.

## Create a New Quote

To create a new quote, press the Add button in the Quotes tab. A new Excel Quote file is generated using the Quote Template set up by the Administrator. This generated file is then downloaded to your browser.



Open the file in Excel. If it is the first time you try to access the add-in, you will be prompted to login to your Maximizer CRM Live site. If you have logged in before, you can start editing the quote.

The screenshot displays the Excel quote template and the Maximizer CRM interface. The Excel template includes fields for company information, contact details, and a table for items. Annotations provide instructions on how to use the template. The CRM interface shows the 'QUOTE' form with fields for contact information, quote details, and a 'SAVE TO MAXIMIZER' button.

**Excel Template Annotations:**

- The Date, Expiry Date, Quote # and Revision # will be populated automatically.** (Points to Date, Expiry Date, Quote #, and Revision # fields)
- Information about the contact associated with the opportunity and the opportunity objective will be merged into the quote automatically.** (Points to PREPARED FOR: field)
- Enter your name and contact information.** (Points to PREPARED BY: field)
- Enter quantity, the cost and total amount will be calculated automatically.** (Points to ITEMS table)
- Select a SKU, the product information will be populated automatically.** (Points to SKU dropdown in ITEMS table)
- Enter tax, discount and shipping cost. The total amount will be calculated automatically.** (Points to Subtotal, Sales Tax, Discount, Shipping, and TOTAL fields)

**Maximizer CRM Interface:**

- MODIFY LAYOUT** dropdown menu.
- QUOTE** section with **CONTACT INFORMATION:** and **QUOTE INFORMATION:** tabs.
- CONTACT INFORMATION:** includes fields for Name, Status, Expiry Date, and Comments.
- QUOTE INFORMATION:** includes fields for Name, Status, Expiry Date, and Comments.
- SAVE TO MAXIMIZER** and **UPDATE OPPORTUNITY** buttons.
- Press SAVE TO MAXIMIZER button to save the quote into Maximizer.** (Points to SAVE TO MAXIMIZER button)

SKU	Description	Unit Price	Quantity	Cost
1234	Product 1 and Description	100	1	\$100.00
1234	Product 2 and Description	200	1	\$200.00
2345				
3456				
4567				
5678				
6789				

**Summary:**

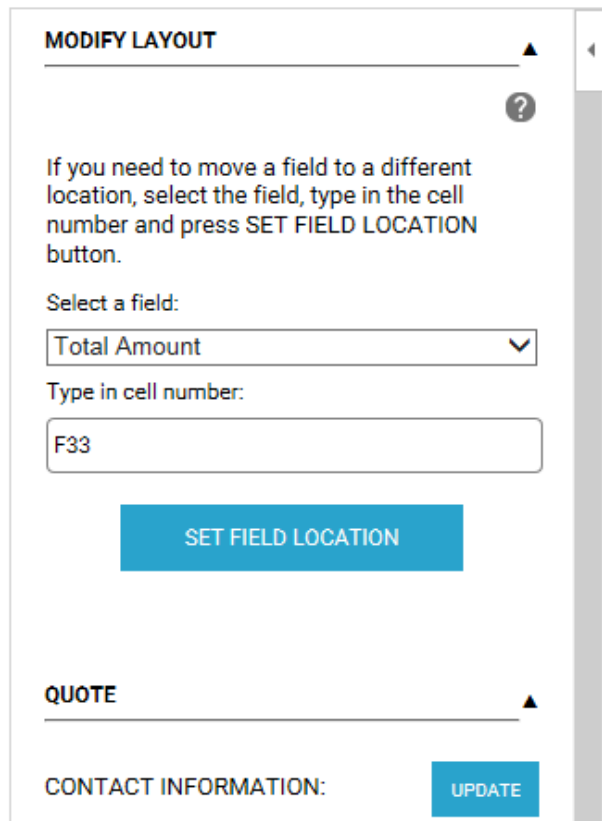
- Subtotal: \$300.00
- Sales Tax: 7%
- Discount: 10%
- Shipping: \$100.00
- TOTAL: \$388.90**

**Note:** Make sure to press the Enter key or click in another cell after entering or changing value in a cell.

In the add-in panel, you need to enter a name for the quote and select a status. The expiry date will be calculated automatically based on the global “default # of days before expiry” setting. You can change the expiry date manually. Once you finish editing the quote, press SAVE TO MAXIMIZER button to save it back into Maximizer. You may need to refresh the Quotes tab to see the new quote.

**Note** that you do not necessarily need to save this file onto your local hard drive because it is already saved into the Maximizer database.

## Maximizer CRM



The screenshot shows the Maximizer CRM add-in panel with the 'MODIFY LAYOUT' tab selected. The panel has a title bar with a close button (X) and a maximize button (square). Below the title bar, the 'MODIFY LAYOUT' tab is active, showing a help icon (?) and instructions: 'If you need to move a field to a different location, select the field, type in the cell number and press SET FIELD LOCATION button.' Below the instructions, there is a 'Select a field:' dropdown menu with 'Total Amount' selected, and a 'Type in cell number:' text input field with 'F33' entered. A blue 'SET FIELD LOCATION' button is positioned below the input fields. At the bottom of the panel, the 'QUOTE' tab is visible, showing 'CONTACT INFORMATION:' and an 'UPDATE' button.

You may adjust the layout of the quote while you are editing the quote. For example, there are many items added into the quote, you need to place the Total Amount to a new cell.

Scroll to top of the panel and expand MODIFY LAYOUT tab, select the field that you want to relocate, enter the new cell number, and press SET FIELD LOCATION button.

## Edit an Existing Quote

To edit an existing quote, select the quote in the Quotes tab you wish to edit, and click. The Excel file for that quote will download and open.

Once you finish editing your quote, press SAVE TO MAXIMIZER. You will be prompted with two options:

- Update the existing quote
- Create a new revision

Select “Update the existing quote” to overwrite the existing quote with the updated information. Select “Create a new revision” to create a new copy. The new quote will have the same Quote #, but a different Revision #.

Details	Quotes	Contacts	History	Notes	User-Defined Fields	Documents	Activities	+	↑	↓	↺	♥
Add	Delete	Properties	Download Template	Settings								
Date	Time	ID	Name	Total Amount	Expiry Date	Status	Creator					
February 7, 2017	1:07 PM	QUO00024-0	First Quote	719.99	February 18, 2017	In Review	MASTER					
February 7, 2017	1:21 PM	QUO00024-1	First Quote (Revised)	2,418.99	February 18, 2017	In Review	MASTER					

If you choose to create a new revision, you will see two quotes with the same Quote #, but different revision numbers.

**Note:** You do not necessarily need to save this file onto your local hard drive because it is already saved into the Maximizer database.

### Merge Updated Contact Information into the Quote

You can get the updated information from Maximizer to the quote

If the contact associated with the opportunity or any of his information has been changed, press the UPDATE button to get the latest information into the quote.

## Maximizer CRM

MODIFY LAYOUT

QUOTE

CONTACT INFORMATION:

UPDATE

Ed Johnson  
ABC Company  
Main: 604-601-2222  
Fax: 604-601-2223  
Cell: 604-601-2224  
Email: edjohnson@abccompany.com

QUOTE INFORMATION:

\*Name:

First Draft

Status:

Customer Review

### Save the Most Updated Opportunity Revenue Value into Maximizer

You can save the total amount of the quote as the revenue of the opportunity in Maximizer.

If the customer has accepted the quote, you can press the UPDATE OPPORTUNITY button to update the opportunity Revenue field with the total amount of the quote.

Status:

Expiry Date:

Comments:

?

?

### Sending a Quote

It is recommended that you save the quote as a PDF before sending it to your customer. Do not send the Excel Quote file to customers or anyone who is not a user of the same Maximizer database as your own, as without the add-in and proper credentials, they will not be able to view the add-in panel in Excel file properly.

If you have the Maximizer Outlook add-in installed, you can send an email with the quote attached using Outlook and save that email against the appropriate opportunity. You will save a copy of the email into the Documents tab.

FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW **Maximizer**


Send Email and Save to Contact Send Email and Save to Opportunity Send Email and Save to Case Add Maximizer Addresses

Email type:

To... chung@sunriseadventures.com

Cc...

Subject You Quotation

Attached  Quote QUO00024 0 (7).pdf (194 KB)



## About Maximizer

**Maximizer CRM is fueling the growth of businesses around the world.**

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



### AMERICAS (HEAD OFFICE)

#### **Maximizer Services Inc.**

**Sales** +1 800 804 6299

**Phone** +1 604 601 8000

**Email** [info@maximizer.com](mailto:info@maximizer.com)

**Website** [www.maximizer.com](http://www.maximizer.com)

### EUROPE / MIDDLE EAST / AFRICA

#### **Maximizer Software Ltd.**

**Phone** +44 (0) 1344 766 900

**Email** [enquiries@maximizer.com](mailto:enquiries@maximizer.com)

**Website** [www.maximizer.com/uk](http://www.maximizer.com/uk)

### AUSTRALIA / NEW ZEALAND

#### **Maximizer Software Solutions Pty. Ltd.**

**Phone** +61 (0) 2 9957 2011

**Email** [info.anz@maximizer.com](mailto:info.anz@maximizer.com)

**Website** [www.maximizer.com/au](http://www.maximizer.com/au)

Further contact details can be found on our website  
**[WWW.MAXIMIZER.COM](http://WWW.MAXIMIZER.COM)**