Maximizer Connect for Excel Quotes

Getting Started Guide

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 doesn't have to be your default browser. Make sure that the path for your server URL is NOT set as Compatibility View in Internet Explorer.

The following sites will be added as the trusted sites in Internet Explorer by the add-in installer. Please don't remove them.
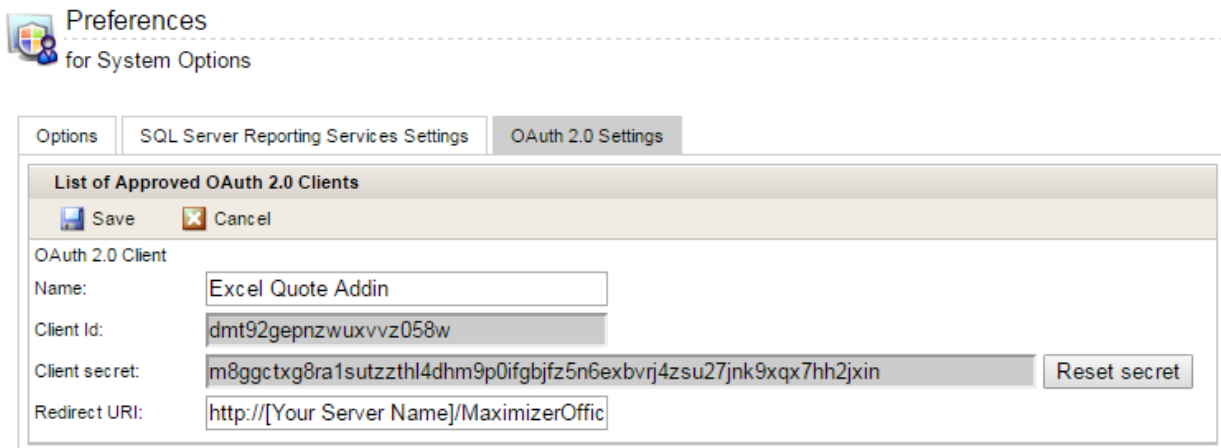https://ajax.microsoft.com/
https://ajax.aspnetcdn.com
https://appsforoffice.microsoft.com/

Maximizer API
On the server where Maximizer CRM is installed, Maximizer web.data API must be enabled.

Setup OAuth 2.0 Settings in Maximizer Administrator
In Maximizer Administrator > Preferences > System Options > OAuth 2.0 Settings, add a new OAuth 2.0 Client.

Name: Enter a name for the client, such as Excel Quote Add-in.

Client ID and Client Secret: You need the values from these two fields during the Excel Quote Server Component installation. Copy the values to a Notepad for use in the installation later.

Redirect URL: Enter the URL in following format,
http://[Your Server Name]/MaximizerExcelQuoteAddin/OAuth/AuthorizeRedirect

Add your server name into the URL.

Excel Quote Server Component Installation

On your Maximizer Web Server, run MaxExcelQuoteAddinServerSetup.msi to start the installation. Follow the instructions in the wizards to complete the process.

Step 1: Select Website that Hosts Maximizer
In this screen, you must select the website that hosts Maximizer.
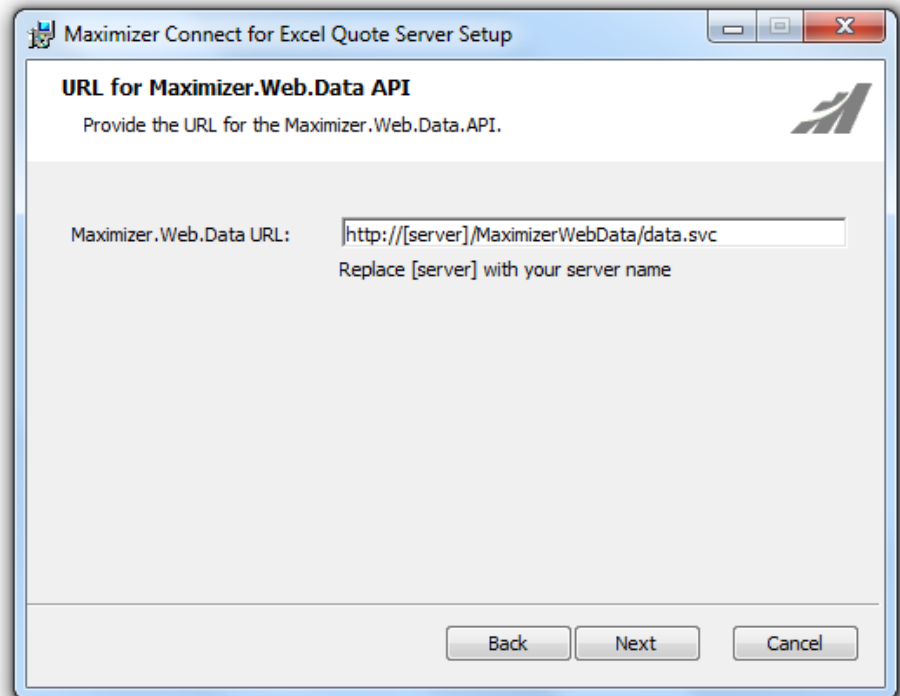
Note:
If Maximizer is not hosted on the Default Web Site, you need to run the installation from the CMD prompt as a local Administrator and select the website that hosts Maximizer from the drop-down list.
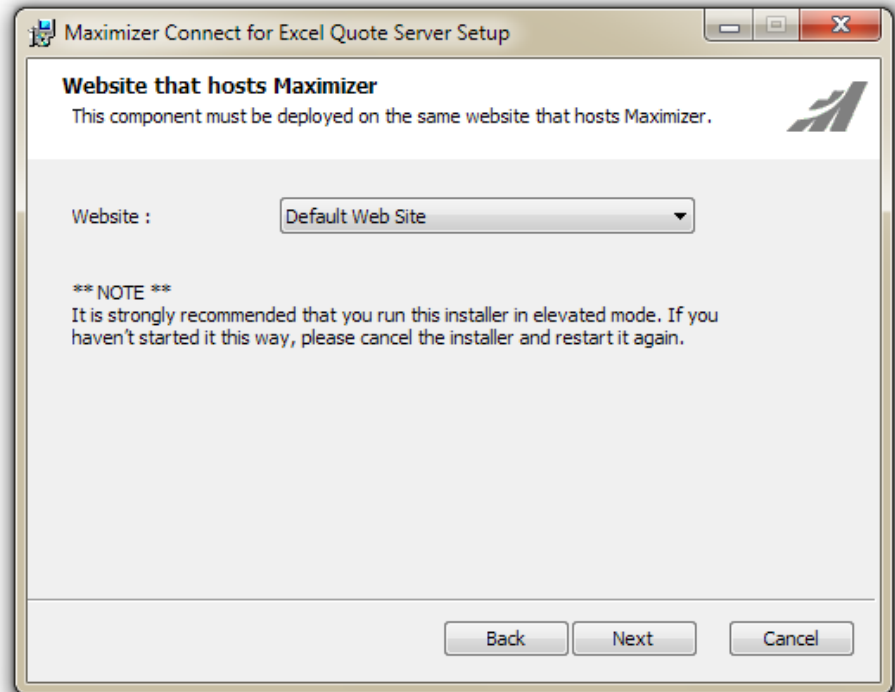
Step 2: Maximizer Web.Data API
In this screen, you need to enter your server name into the URL.

Step 3: OAuth Client ID and Client Secret

In this screen, enter the values for Client ID and Client Secret. You need to copy the values from Maximizer Administrator > Preferences > System Options > OAuth 2.0 Settings to this screen. An OAuth 2.0 client for Excel Quote needs to be created in Administrator.

Maximizer Connect for Excel Quote Server Setup

Maximizer OAuth Client ID and Client Secret.
Enter OAuth Client ID and Client Secret.

Maximizer OAuth Client ID: 1gdvhsgs74sx6u717zru

Maximizer OAuth Client Secret: 4oew0sjv2sizdv4kbu9q1ygr3ea8y12kfnx6cdxbd2i1b3jjb

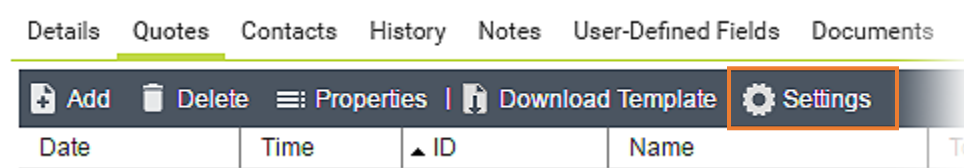Get the Client ID and Client Secret from Maximizer Administrator.

You need to create an OAuth Client for Excel Quote in Administrator > System Options > OAuth 2.0 Settings. Copy the values from the Client ID and Client Secret fields and paste them into the respective fields in this screen.

Back   Next   Cancel

Quotes Tab

After the server component is installed, the Quotes Tab will be displayed in the Opportunities module.

Settings for Quotes

Details	Quotes	Contacts	History	Notes	User-Defined Fields	Documents

⊞ Add	🗑 Delete	≡ Properties	📄 Download Template	⚙ Settings

Date	Time	▲ ID	Name	To

Settings

Quote status:

- Abandoned
- Accepted
- Expired
- In Review

ADD MODIFY DELETE

Default # of days before expiry: 15

Quote ID prefix: QUO

# of digits for Quote ID: 5

Sample Quote ID: QUO00001

OK   CANCEL

Only the Maximizer Administrator can edit the settings for quotes. In the Quotes 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

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Excel Quote Add-in Installation

All users including the Maximizer Administrator will need to install the Maximizer Excel Quote Add-in in order for the quoting tool to function. From within the Quotes tab in 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.
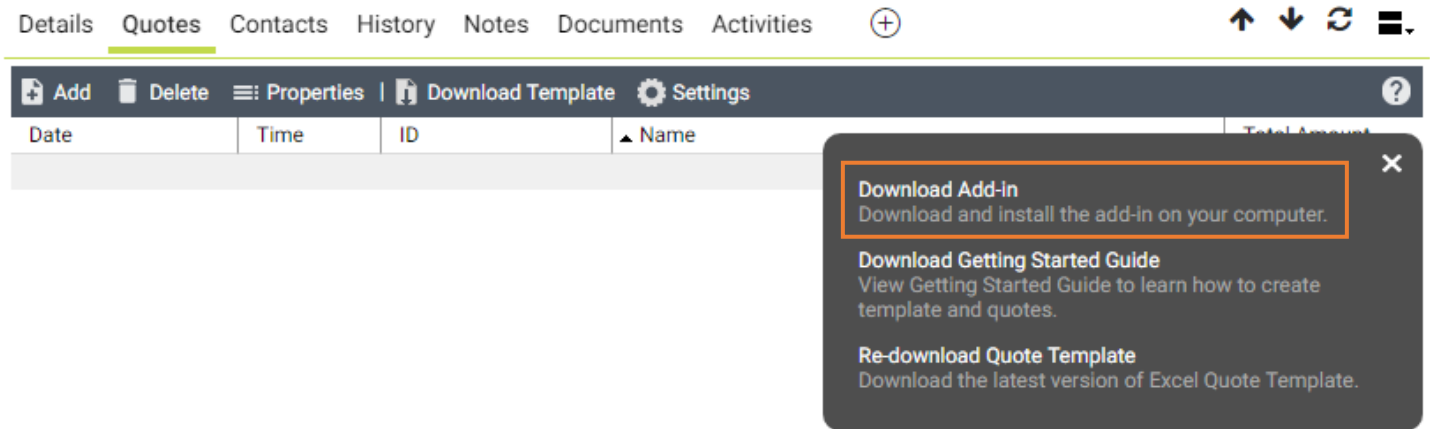
Run MaxExcelQuoteAddin.exe and follow the instructions in the wizards. During the installation, you need to enter the URL for the Excel Quote Server Component. Enter your server name into the URL.
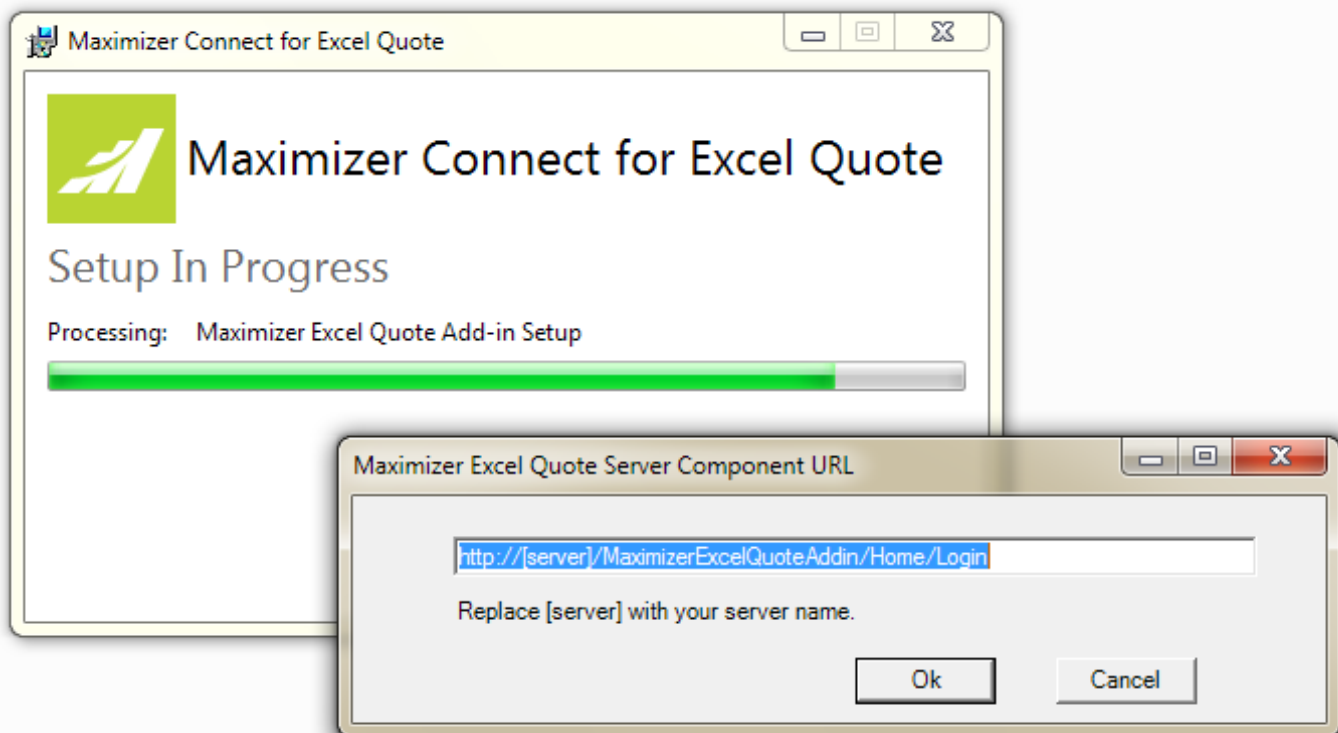
Setup Template

Before you can create quotes, your **Administrator** needs 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.

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

Open the downloaded Excel file, edit the template in Excel and save it back to Maximizer.
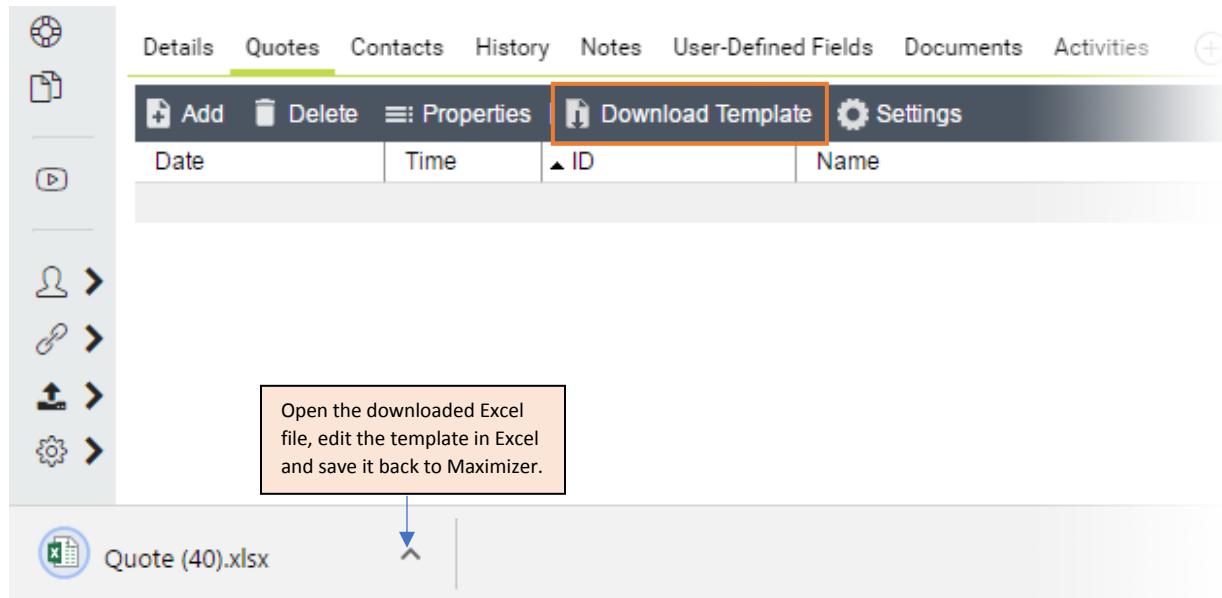
Open the file in Excel. Since the file is downloaded from the Internet, you may see the warning about the Protected View in Excel. Press Enable Editing button. You need to insert the Maximizer Excel Quote add-in into the file and convert it to a Quote Template.

**Insert Maximizer Excel Quote add-in into the template**
If you install the add-in, go to Excel > Insert Tab in the Ribbon bar > My Apps > Shared Folder tab, select Maximizer CRM, and press Insert button.
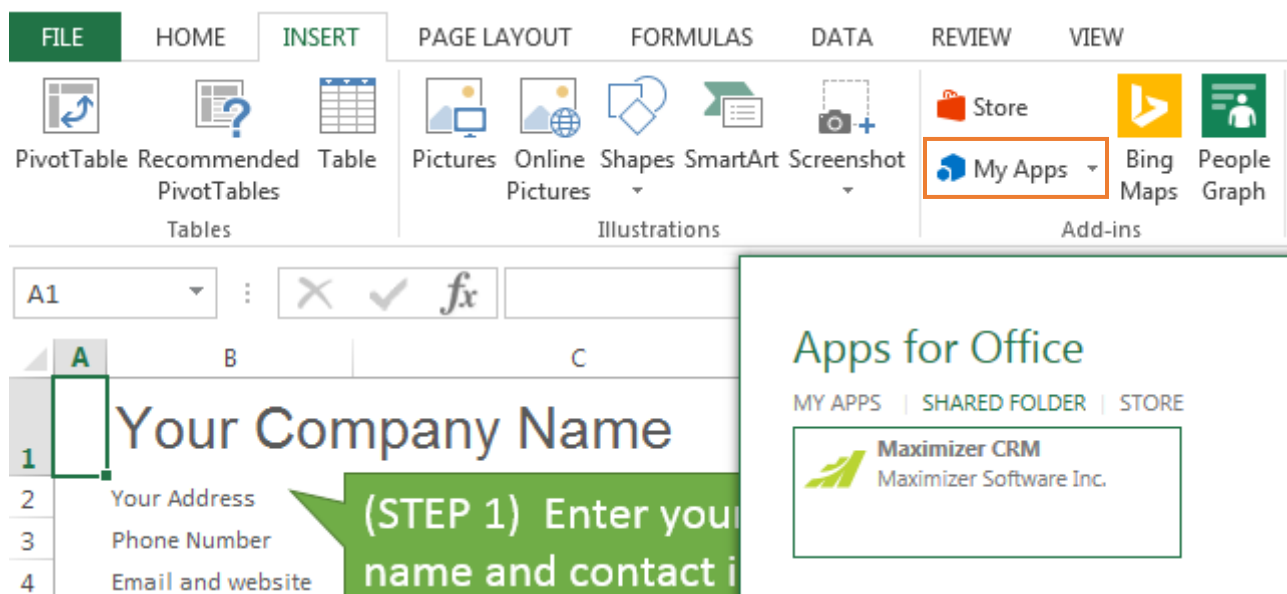
In some companies, the IT team will install add-ins on each user's computer. If someone else installs the Excel add-in on your computer, you won't see the Maximizer Excel Quote add-in App in the Insert Tab of the Ribbon bar > My Apps. You need to add the Trusted App Catalog first.

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.
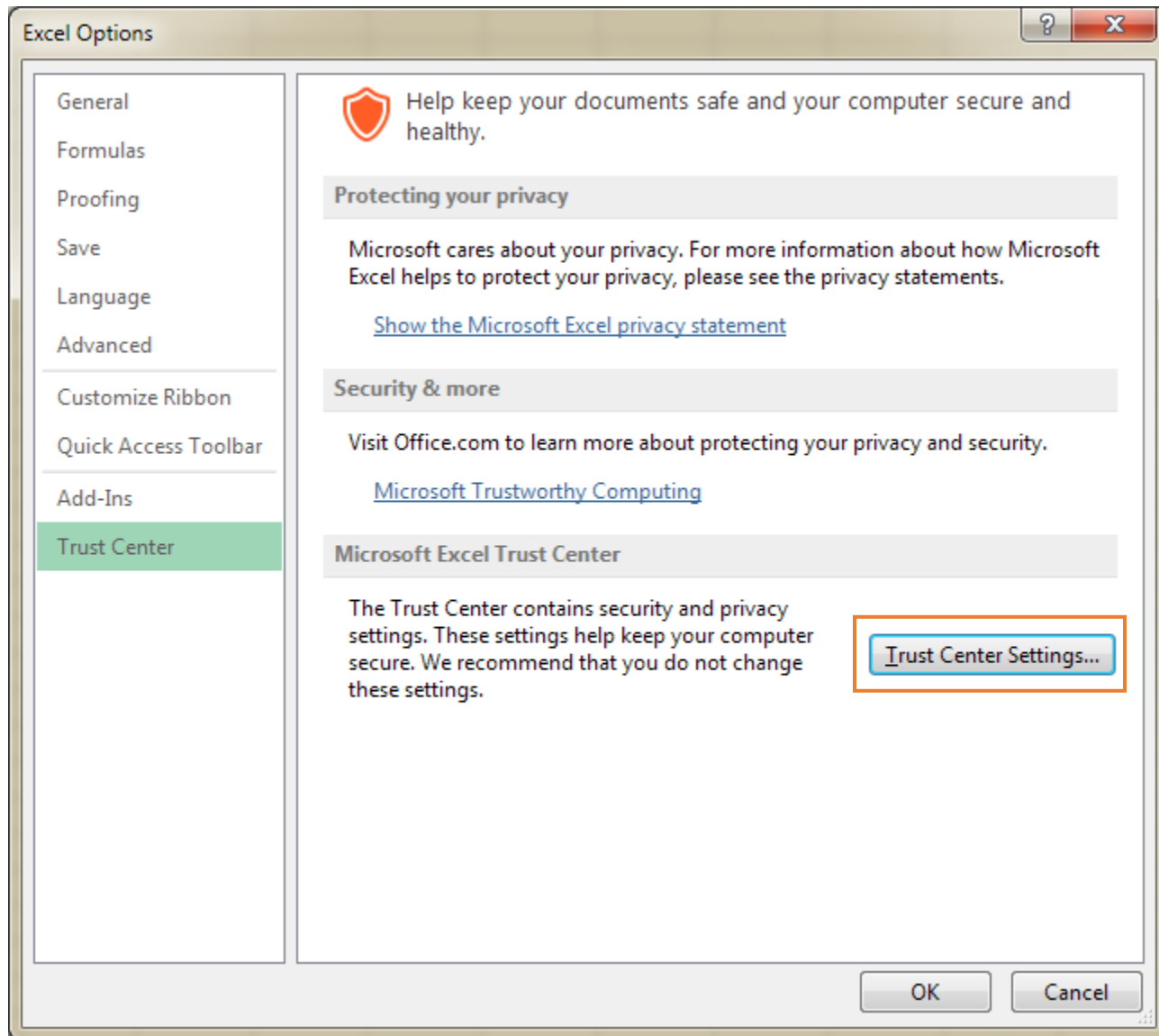
In Trust Center dialog, click Trusted App Catalogs tab. Enter the following URL into the Catalog URL field:
[\\.\C:\MaxConnectOfficeAddins](\\.\C:\MaxConnectOfficeAddins)

Press Add Catalog button. Make sure to check Show in Menu option. Press OK button.
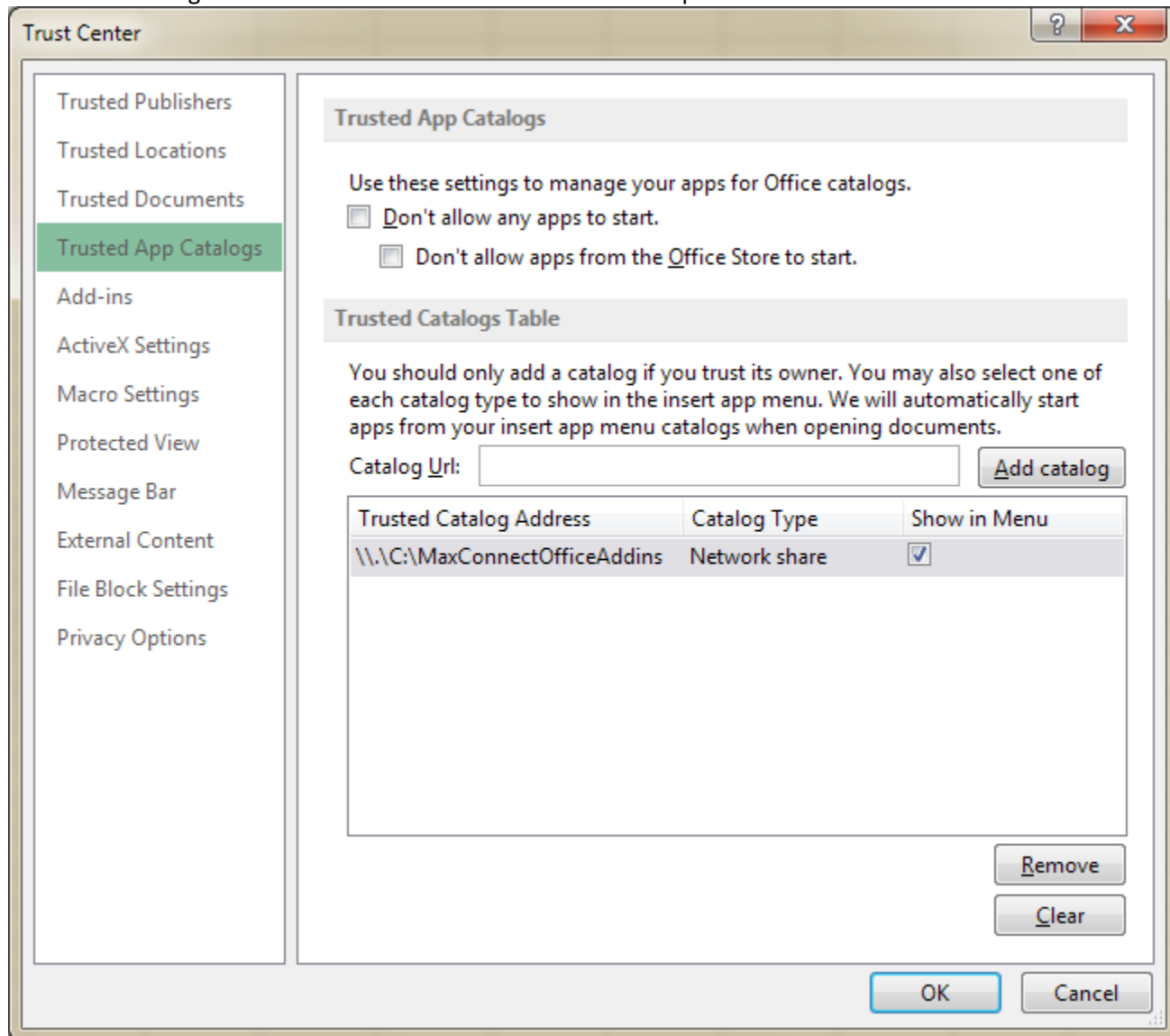
Close the Excel file. When you open Excel again, the Maximizer Excel Quote add-in will be available in Insert Tab in the Ribbon bar > My Apps > Shared Folder tab. Download the template from the Quotes tab, open it in Excel and insert the add-in.

Convert to Quote Template

The Maximizer Excel Quote add-in will be displayed in the Excel add-in panel. Press the CONVERT TO TEMPLATE button.

Note: Do not change the name of Quote and Config sheets.

You will be prompted to save the file to your computer and open the file again. Once you open the file, you will need to login to an Address Book. Press the LOGIN button. The Login dialog will be open in Internet Explorer. Select an Address Book, enter your user ID and password. Note that you need to have the Administrator role to save the template into the Address Book.

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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

Edit Quote Template
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.


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.
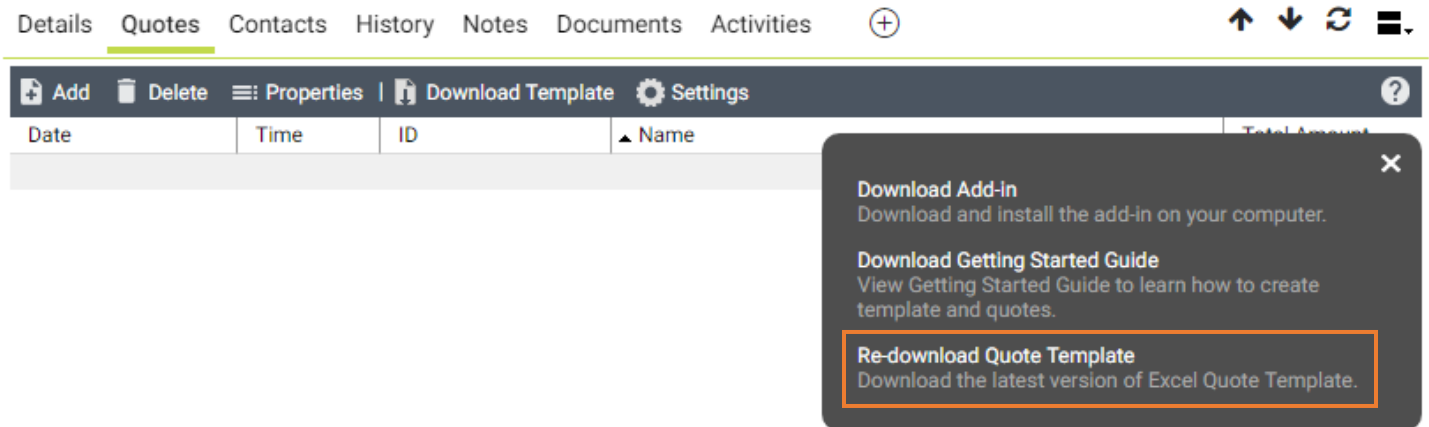
Using pre-existing Excel Quote templates

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. Go to the Ribbon bar > Insert Tab > Add-in > 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 Quote Template in this sheet later.

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

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CONVERT TO QUOTE TEMPLATE ◂

This spreadsheet has been converted to a Maximizer quote template. To continue, save this file to your local drive, and then reopen it in Excel again.

Once the file opens, you can edit the format of the template in Quote tab. When you finish editing the template, save it into Maximizer.

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 Address Book. After login, you will be able to edit the template the same way as modifying the built-in template. You need to have Administrator role in order to edit the template and save it into Maximizer.

You need to set location for 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 Following Tab

The Quotes following tab displays the quotes created for the 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						

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

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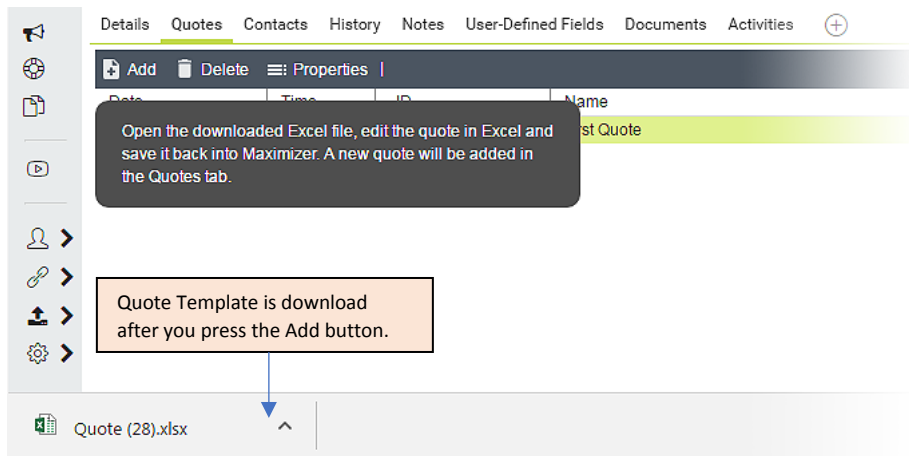
Pressing the Properties button will open the dialog for quickly editing some of the information about the quote, including Name, Status, Expiry Date and Comments.

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 Add button in Quotes following 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 downloaded Excel file, edit the quote in Excel and save it back into Maximizer. A new quote will be added in the Quotes tab.

Quote Template is download after you press the Add button.

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 Address Book. If you have logged in before, you can start editing the quote.

The Date, Expiry Date, Quote # and Revision # will be populated automatically.

Information about the contact associated with the opportunity and the opportunity objective will be merged into the quote automatically.

Enter your name and contact information.

Enter a name for the quote and select a status.

Enter quantity, the cost and total amount will be calculated automatically.

Select a SKU, the product information will be populated automatically.

Press SAVE TO MAXIMIZER button to save the quote into Maximizer.

Enter tax, discount and shipping cost. The total amount will be calculated automatically.

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ITEMS:

SKU	Description	Unit Price	Quantity	Cost
1000	Product 1 and Description	100	1	$100.00

Subtotal: $100.00

When selecting a SKU from the drop-down list, if you don't see any item, scroll up to reveal all the items.

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

MODIFY LAYOUT

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.

Select a field:

Total Amount

Type in cell number:

F33

SET FIELD LOCATION

QUOTE

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, click a quote in the Quotes following tab. The Excel file for that quote will be downloaded.

Open the file in Excel and make changes. Once you complete editing, press SAVE TO MAXIMIZER button. You will be prompted with two options:
- Update the existing quote
- Create a new revision

Select "Update the existing quote" will overwrite the existing quote with the update information. Select "Create a new revision" will create a new copy. The new quote has the same Quotation #, but a different Revision #.

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

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.

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.

Save Most Updated Opportunity Revenue Value into Maximizer

You may save the total amount of the quote as the Revenue field 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.

Sending a Quote

It is recommended that you save the quote as a PDF file to your local computer and send your saved PDF version to your customers. It is not recommended that you send the Excel Quote file to anyone who is not a user of the Maximizer database from which the quote originated, 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 via Outlook, and save it into the opportunity. You will save a copy of the email into the Documents tab.

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.

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MAXIMIZERCRM

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