



Key Features

- Cloud based access from mobile devices
- Responsive design to fit any screen size
- Fully integrated with MotorBase ERP
- 4 user role levels
- Built in messaging
- Export data to Excel or PDF
- Office 365 , Google, SharePoint, MailChimp, and Constant Contact integration

Full featured CRM software — Capture and view all customer data in one place.

Capture appointments, calls, sales, opportunities, contacts, and all customer related data.

Reporting, Calendars, and Google Maps

Quick simple reports provide the data you need. Calendars for appointments and a company shared calendar. Show appointments and customers on Google Maps.

MotorBase ERP integration

CRM data is synchronized with MotorBase—customers, contacts, and appointments. Updating data in either system is synched between both systems.

Can also be used as a stand-alone product.

Integrated with



- Schedule activities
- Track sales opportunities
- Convert prospects to customers
- Manage sales operations
- Portray the sales funnel
- Monitor progress

The screenshot displays the CRM Dashboard Home Page with the following components:

- Navigation Bar:** CRM spring point, Dashboard, Activities, Opportunities, Contacts, Customers, Reports, Search, and user profile (Rick H. CRM Demo).
- Dashboard Home Page:** CRM Dashboard Home Page
- 1 New Notifications:** A notification from Wed Dec 14 01:28 PM titled "Talk about Notifications" created by Troy Locke.
- Dashboard Reports:**
 - 2018 YTD, All Divisions (Admin), ALL Salespersons
 - 2018 Sales per Month - All:** Bar chart showing Sales (blue) and Monthly Goal (red) for Jan, Feb, Mar, Apr. Monthly Sales Goal is \$30,000.
 - 2018 Opportunity Pipeline Chart by Status - All:** Pie chart showing Opportunity Status: Waiting for Approval (blue), Accepted (green), Open (yellow), On Hold (orange), Rejected (red).
 - 2018 Profit per Month - All:** Line chart showing Profit (blue) and Monthly Goal (red) for Jan, Feb, Mar, Apr. Monthly Profit Goal is \$5,000.
- Activity Range:** Last Week, Yesterday, Today, Tomorrow, This Week, Next Week.
- Activity List:**

Activity Time	Customer	SP	Contacts	Objective For Activity
5/28/2018 9:00 AM	Big A's Excavators, Inc. (BAE)	TL	Travis Rorcsh	Weekly call with Troy to review open ...
5/29/2018	Big A's Excavators, Inc. (BAE)	SM	Travis Rorcsh	Call Troy if I've not heard back by now.
5/30/2018	Rick's Test Center (RTC)	SM	Rick Hollen	Stop by the shop. Rick has not been r...



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Information flows in real time between MotorBase and the CRM to ensure your sales reps are always prepared with the latest progress. The integration prevents multiple mismatched data bases which often occur when different systems are maintained by different people or departments with a company.

Activities List | Calendar | Map

+ Add New Activity | Last Week | Yesterday | Today | Tomorrow | This Week | Next Week | 50 per page

Activity Time	Customer	SP	Objective For Activity
View Delete 🚗 4/18/2018 1:00 PM	City of Westbrook (CoW)	H	Present EM plan.
View Delete ✉️ 12/31/2016	Big Al's Excavators, Inc. (BAE)	H	Email price list.
View Delete 🚗 4/25/2018 10:00 AM	Casco Bay Yachts (CBY)	TL	Present cost savings to customer
View Delete 🚗 4/17/2018 12:54 PM	Maine Transport Co. (MTC)	H	Site visit. Met with Jim and Alice.
View Delete 🕒 10/12/2017 10:30 AM	Beal-Tek Labs (BTL)	TL	Schedule next quarterly conference.
View Delete 📞 10/30/2017	Beal-Tek Labs (BTL)	TL	follow up on PO's
View Delete 📞 5/8/2018 6:30 AM	Freeport Country Club (FCC)	TL	Follow up on PO# 2876-897.
View Delete 📞 5/15/2018 10:00 AM	Maine Transport Co. (MTC)	SM	Phone conference to discuss customer ...

Customers List | Map

+ Add New Prospecting Customer | All (19) | Active (16) | Inactive (0) | Hold (1) | Prospecting (1) | CRM Only (1) | 50 per page

Status	Rank	Cust ID	Customer Name	SP	Location	Last Activity Date	Next Activity Date	Number Of Activities YTD	Opportunities Open / Waiting
View	✔️	BAE	Big Al's Excavators, Inc.	TL	Portland, ME	5/29/2018	6/4/2018	31	1 / 1
View	✔️	BTL	Beal-Tek Labs	TL	Westbrook, ME	5/30/2018	6/7/2018	6	0 / 1
View	✔️	CoW	City of Westbrook						
View	✔️	MTC	Maine Transport Co.						
View	✔️	RTC	Rick's Test Center						
View Delete	🔴	JDT145	John Dolson Testing						
View	✔️	CBY	Casco Bay Yachts						

Customers List | Map

+ Add New Prospecting Customer | All (19) | Active (16) | Inactive (0) | Hold (1) | Prospecting (1) | CRM Only (1)

Configure Stages

Lead	Prospect	Needs Defined	Evaluation	Decision	Closed
<p>Yarmouth Sand & Gravel (YSG)</p> <p>Become established / preferred supplier.</p> <p>\$ Sales</p> <p>● Open \$40,000.00</p>	<p>City of Westbrook (CoW)</p> <p>Management of municipal water station equipment.</p> <p>Non Quote</p> <p>● Open \$15,000.00</p>	<p>Big Al's Excavators, Inc. (BAE)</p> <p>15hp, 1175 rpm, 213T</p> <p>\$ Sales</p> <p>● Open \$2,040.00</p>	<p>Maine Transport Co. (MTC)</p> <p>Development of custom program.</p> <p>\$ Sales</p> <p>● Waiting for Approval \$7,600.00</p>	<p>Beal-Tek Labs (BTL)</p> <p>Industrial Repair Opp</p> <p>🔧 Repair</p> <p>● Waiting for Approval \$20,000.00</p>	<p>Beal-Tek Labs (BTL)</p> <p>Equipment management (motors, pumps, generators...)</p> <p>Non Quote</p> <p>● Accepted \$10,000.00</p>
<p>Sea Life Energy (SLE)</p> <p>Install pump and motor in new tide tank.</p> <p>\$ Sales</p> <p>● Open \$6,500.00</p>	<p>Rick's Test Center (RTC)</p> <p>RTC is looking to upgrade test equipment. Start...</p> <p>\$ Sales</p> <p>● Open \$5,100.00</p>	<p>Maine Transport Co. (MTC)</p> <p>Replaces generator at 349 Portland Ave location.</p> <p>\$ Sales</p> <p>● Open \$10,000.00</p>	<p>Saco River Construction (SRC)</p> <p>Overhaul (7) motors currently stored in warehouse.</p> <p>🔧 Repair</p> <p>● Waiting for Approval \$26,000.00</p>	<p>Sebago Paper Mill (SPM)</p> <p>MINOR AC MOTOR REPAIR, DISMANTLE, CLEAN, A...</p> <p>🔧 Repair</p> <p>● Accepted \$23,000.00</p>	<p>Yarmouth Sand & Gravel (YSG)</p> <p>10-150A, C FACE KIT-Ⓡ /-</p> <p>\$ Sales</p> <p>● Accepted \$282.85</p>
<p>Westbrook Auto Salvage (WAS)</p> <p>Crusher #4 motor failed. Needs replaced ASAP</p> <p>\$ Sales</p> <p>● Open \$6,500.00</p>	<p>Ocean Tours, Inc. (OTI)</p> <p>Update rudder drive motors with new and repair ...</p> <p>🔧 Repair</p> <p>● Open \$35,500.00</p>	<p>Freeport Country Club (FCC)</p> <p>16HP 1765RPM,3PH,60HZ</p> <p>\$ Sales</p> <p>● Waiting for Approval \$1,804.32</p>			
<p>(P) Gorham Country Club (GCC116)</p> <p>Spare & Repair contract. Referred by Freeport CC.</p> <p>Non Quote</p> <p>● Open \$12,000.00</p>	<p>Big Al's Excavators, Inc. (BAE)</p> <p>Large Motor Repair</p> <p>🔧 Repair</p> <p>● Waiting for Approval \$10,000.00</p>				
<p>Millside Industries (MI)</p> <p>Repair Quote</p> <p>🔧 Repair</p> <p>● Accepted \$1,023.50</p>					

CRM Integrations

SpringPoint CRM allows access to other applications through the use of API calls and other methods of sending/receiving data. Below are the available integrations with other applications.

- MailChimp**: Mail Chimp Integration will sync CRM contacts to MailChimp. MailChimp provides marketing automation for any businesses. Send beautiful emails, advertise, and build your brand. To learn more, please click here: mailchimp.com
- Constant Contact**: Constant Contact Integration will sync CRM contacts to Constant Contact. With Constant Contact, you can create effective email marketing and other online marketing campaigns to meet your business goals. To learn more, please click here: constantcontact.com
- Office 365**: Enabling Office 365 integration will synchronize your CRM activities calendar and your CRM contacts with your Office 365 account. You can choose to sync just your activities or contacts or both. Learn More
- Google**: Enabling Google integration will synchronize your CRM activities calendar and your CRM contacts with your Google account. You can choose to sync just your activities or contacts or both. Learn More

Event Calendars

Integrate CRM Event Calendars with Office365-Exchange calendars, Sharepoint calendars, and Google calendars.

discover the Spring Point difference