



Capture & view customer data in one place

Simple. Clean. Easy.

Full featured CRM software – Capture and view all customer data in one place
 Capture appointments, calls, sales, opportunities, contacts, and all customer related data.

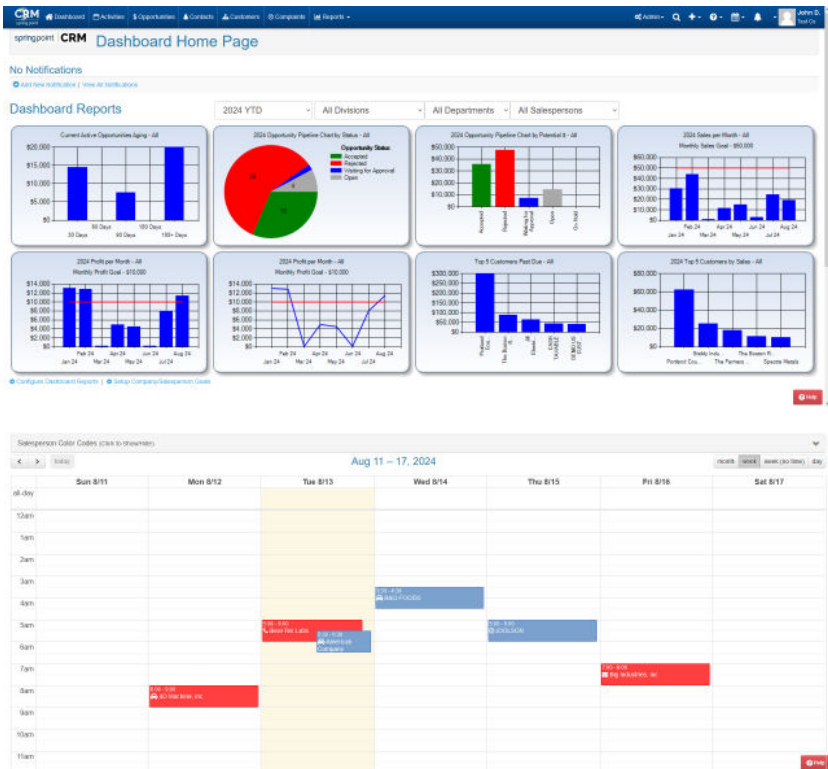
Reporting, Calendars, and Google Maps
 Quick simple reports provide the data you need. Calendars for appointments and a company shared calendar. Show appointments and customers on Google Maps.

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

Can also be used as a stand-alone product

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



Integrated with



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

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.

The CRM interface shows a 'Customers' view with a map of the Portland area. A pop-up window for 'Portland Country Club - 18th GREEN' displays details like '18th GREEN', 'Portland Country Club', and '18th Green'. The map includes various location markers and a search bar.

The 'Configure Deals' section displays a pipeline of deals from 'Lead' to 'Closed'. Each deal card includes the name, value, and status. For example, 'Spectra Metals (SPECTRA)' is valued at \$220,000 and is in the 'Accepted' stage. Other deals include 'Portland Country Club (PORTLAND)' and 'The Farmers Table (FARM TABLE)'.

The 'Sales by Customer Analytics YTD' dashboard features several charts:

- Top 5 Customers in Sales YTD:** A bar chart showing sales percentages for 'The Season R...', 'Spectra Metals', 'The Farmers...', 'Portland Cov...', and 'Sickly indu...'.
- Sales by Month of Cycle:** A bar chart comparing monthly sales against a \$50,000 budget from Jan to Aug.
- Sales Breakdown by MTD:** Two pie charts showing sales by location and by product type (e.g., 'Riser', 'Table').
- Sales Breakdown by YTD:** A pie chart showing sales by region (e.g., 'Region 1', 'Region 2').

The 'Collections Report' shows a table of accounts with columns for account name, amount, and date. A bar chart on the right visualizes the collection status over time, with bars representing 'Total' and 'Paid' amounts.

The 'Opportunity Win/Loss Report' includes a bar chart comparing 'Win' (green) and 'Loss' (red) opportunities. Below the chart is a table with columns for Customer, Win/Loss Reason, Status, Type, Start Date, Potential \$ Amount, Order #, Job #, and Quote #.

The 'CRM Integrations' section lists various connected services including 'Constant Contact', 'Office 365', and 'Google'. It provides details on how these services are integrated with the CRM system.