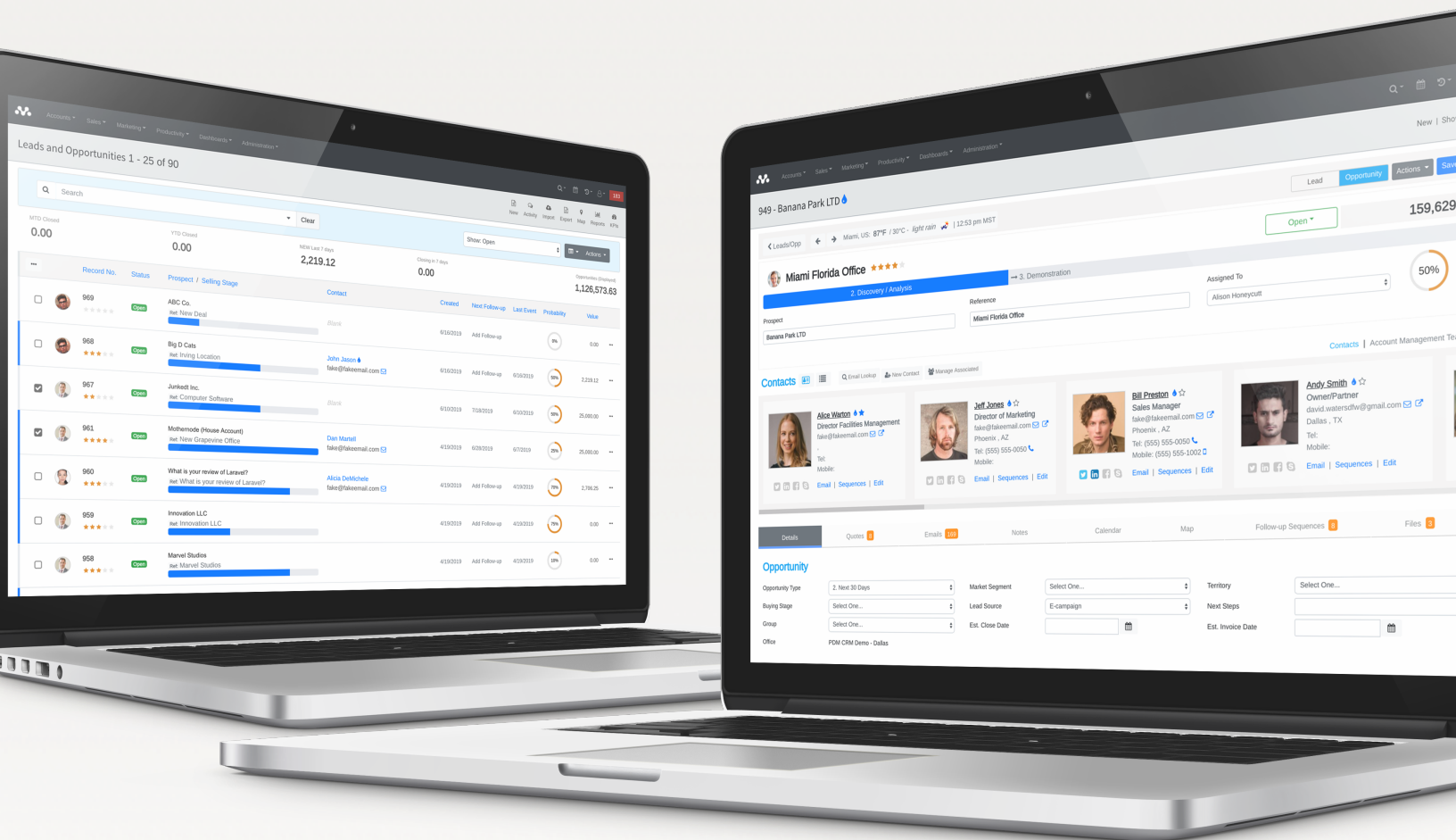




Mothernode CRM SALES & MARKETING EDITION

Increase lead acquisition and conversion, measure campaign revenue and integrate with popular marketing applications.

Mothernode CRM



The easiest way to run
your business



Sales & Marketing Edition

Mothernode's Sales & Marketing edition is the perfect match for organizations looking to incorporate marketing automation and services into their sales process. This edition includes critical enhancements to the Sales Team edition that help you leverage your lead acquisition capabilities and integrate with your existing marketing technology.



Contact Management

Making connections is paramount to business success. With Mothernode, contact interaction has never been easier to manage. A single screen provides snapshots and allows quick access to all contacts, making communication fast and efficient.



Account Management

Customer Account Management provides you with access to all transactions, notes and customer communication. Nurturing customers and maintaining relationships is now within the tips of your fingers.



Collaboration

Mothernode's collaboration tools allow you to stay updated on customer accounts in real-time, whether in the office or away. These social networking tools provide constant updates of your customers' activities, ensuring you never miss an important event from followers or those whom you follow.



Opportunities

Quick lead follow-up results in more sales, while delays kill deals. The automated tools in Mothernode's Sales & Marketing edition helps improve lead management capabilities and keeps you connected to opportunities—as soon as they become available.



Sales Management

Increasing leads and boosting sales now takes fewer resources when using the Sales Management module. Automated reporting, comprehensive dashboards and a wide array of tools help you manage your sales team more efficiently and profitably, regardless of its size.



Mobility

Most successful sales teams are 'in the field' closing deals—not hanging around in the office. Managing leads and sales from mobile devices is now easier and more efficient, when using Mothernode's wide assortment of collaboration tools.

Mothernode CRM

SALES & MARKETING EDITION

Create more qualified opportunities for your business and increase your close ratio

Convert Prospects Faster

- Automate your sales and marketing process
- Streamline your workflow from initial contact to fulfillment
- Deliver results faster and meet customer expectations
- Easily manage more business and increase your close ratio

Increase Lead Intake

- Create lead capture forms to convert more business
- Integrate lead forms with marketing automation
- Track real time conversions by forms
- Assign forms to sales reps and/or campaigns

Marketing Integration

- Seamless integrate your sales process with Infusionsoft™, HubSpot™, Mailchimp™ or Constant Contact™
- Real-time campaign analytics that show you how much *revenue* your marketing initiatives are producing
- Build template libraries and automate email communication

Quote like a Boss

Accounts

Sales

Marketing

Productivity

Dashboards

Administration

183

Quote: 405-1

New

Export

Show All

Print / Send

Previous

Next

Miami Florida Office

Customer Banana Park LTD (change)	Location Primary Location (change)	Revision Date 6/12/2019	Revision No. 1	Valid Until 7/12/2019	Case Ref.	Lead/Opp Ref. 949 (edit)
55,924.00 Made Here	6,488.00 Made Out	0.00 Ship/Crate	62,412.00 Sub-Total	(0.00) Discount	4,613.73 Sales Tax	67,025.73 Total

Quote Header

Quote Entry

Terms & Conditions

Proposal

Deposit Invoices

Tasks

History

Files

Sent Files 3

Add Item

Edit Entries

Resort

Sub Items: [Include in Print](#) | [Don't Include in Print](#) | [Load Template](#) | [Save as Template](#)

Go to item 1 - Sony Single Disc BluRay player

No.	Item Name	Description	Quantity	Unit Cost
1	Sony Single Disc BluRay player	Sony Single Disc BluRay player with BD-Live, Full HD Audio Decoding, built-in wireless capabilities for Netflix	5	500.00
			Markup (0 %)	0.00
			Discount (0 %)	(0.00)
			Unit Total	500.00
			Ext. Price	2,500.00

Action

Add Sub Item

Edit

Duplicate

Remove

Add Note

Taxable

Made Here

Unit Total: 500.00

2,500.00

2	Home Theatre System (Starter)		2	3,244.00
			Markup (0 %)	0.00
			Discount (0 %)	(0.00)
			Unit Total	3,244.00
			Ext. Price	6,488.00

Action

Add Sub Item

Edit

Duplicate

Remove

Add Note

Non-Taxable

Made Out

2.1	Samsung 55" LED HDTV	Samsung 55" LED HDTV
-----	----------------------	----------------------

Action

Edit

Duplicate

Remove

☐ Include in Print

Taxable

Made Here

2.2	APPLETV AppleTV	Apple TV gives you access to the best 1080p HD content, including blockbuster movies, TV
-----	-----------------	--

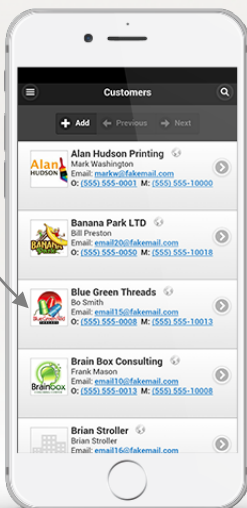
Mothernode CRM Mobile

Mothernode CRM Mobile empowers you with the ease and convenience of accessing your customers, contacts and sales opportunities, no matter where your business takes you.

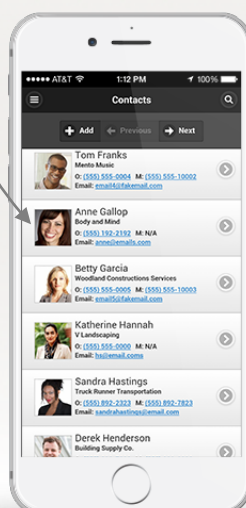
- ▶ Shorten your sales cycle and close deals quicker.
- ▶ Collaborate and connect with your team in real-time, even while on the go.
- ▶ Access all of your customer accounts and contacts with ease.
- ▶ Send emails and create calendar appointments right from the app.
- ▶ Access all of your sales activity and service customers right from your device.
- ▶ Create tasks and events for customers, contacts and opportunities.
- ▶ Simplify your experience with a user friendly interface.



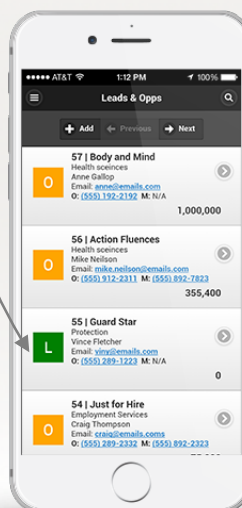
Manage your customer accounts



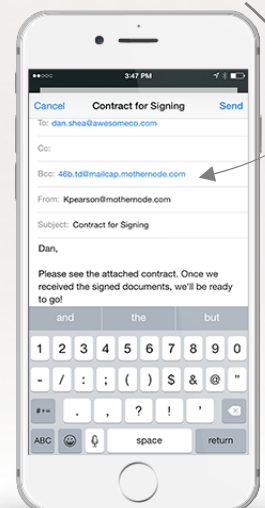
Access all of your contacts



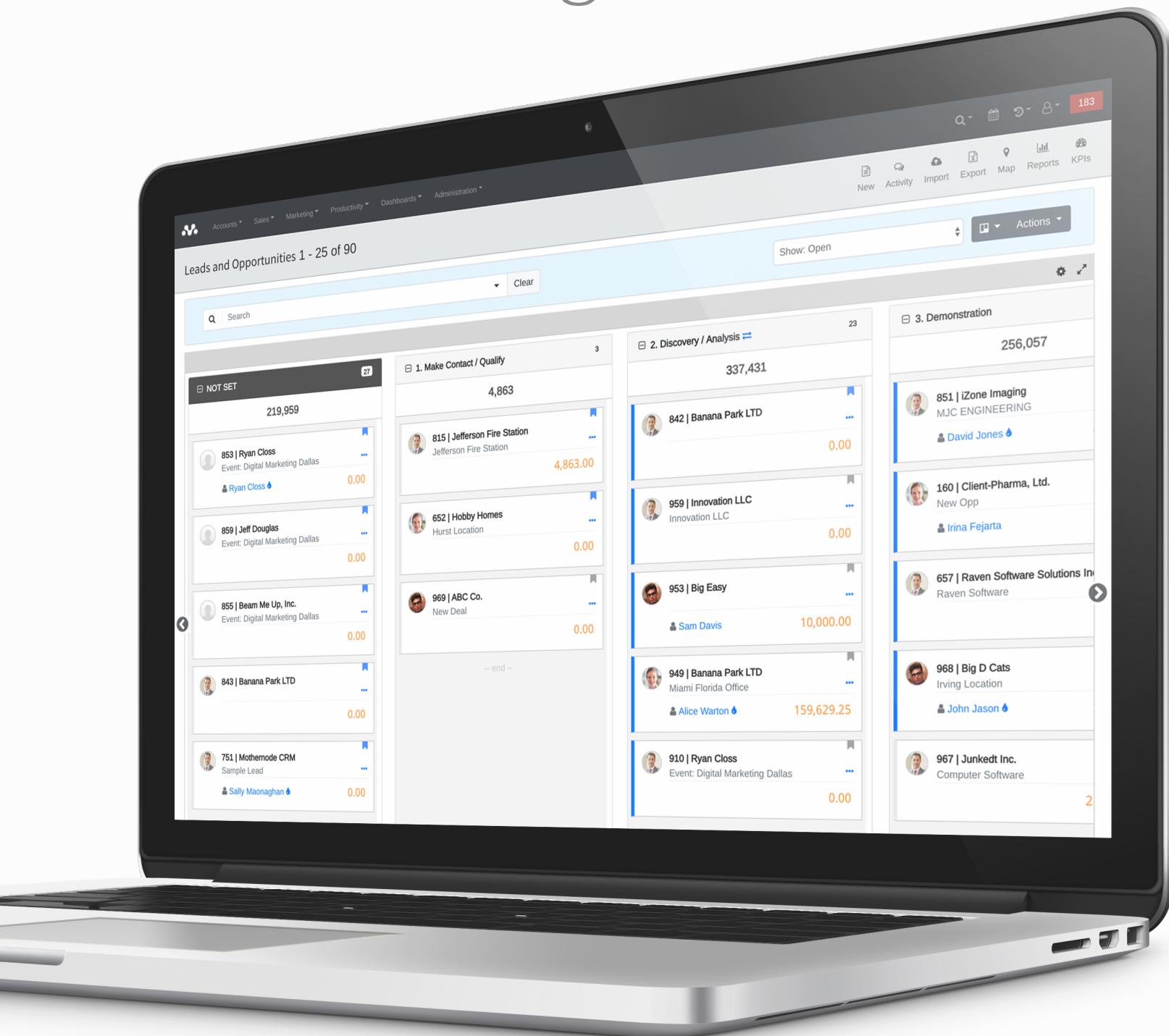
Manage your leads and opportunities



Compose emails and archive them in Mothernode



Sensible Sales Management



Visualize your sales process and improve the way you manage your prospects and pipeline

(Card view)



Lead Generation - 24 / 7 / 365

Convert more website visitors into paying customers and automate your online engagement process with Mothernode CRM's Lead Capture Forms.

Engage your visitors

Make the most of your website by incorporating Mothernode Lead Capture forms with your landing pages, blogs, and downloadable content.

Automate your follow-ups

Let Mothernode do the work for you! Incorporate your marketing automation and follow-up sequences to effortlessly engage your visitors.

Get Started in Minutes

Create your Mothernode CRM Lead capture forms and stylize it to match your website theme. Then copy and paste the form code into your web site. No programming required.



Website Visitor Tracking

Turn your website into a powerful sales tool! Just because your prospects and customers aren't engaging with you personally, it doesn't mean they aren't interested in your brand, your message or your offering. Find out what your website visitors are really doing. Get real-time notifications each time your contacts visit your web pages and see which pages peak their interest most. Get the upper hand in your sales process.



Supercharge Your Marketing

Enhance your digital marketing with extended visitor analytics. You already see which of your email recipients are clicking your links with your Mothernode email marketing, but with website visitor analytics, you can follow their footsteps throughout your entire website and see what they're really interested in.



Track your Website Visitors

Capture the data you need to track your visitors and better understand their behavior and interest. Which of your site pages are they hitting the most, how long are they spending on your website, which devices do they use to view your site and so much more.



Get Realtime Notifications

Mothernode lets you know when it's time to take action, by giving you realtime notifications when your customers, contacts and prospects are visiting your website.



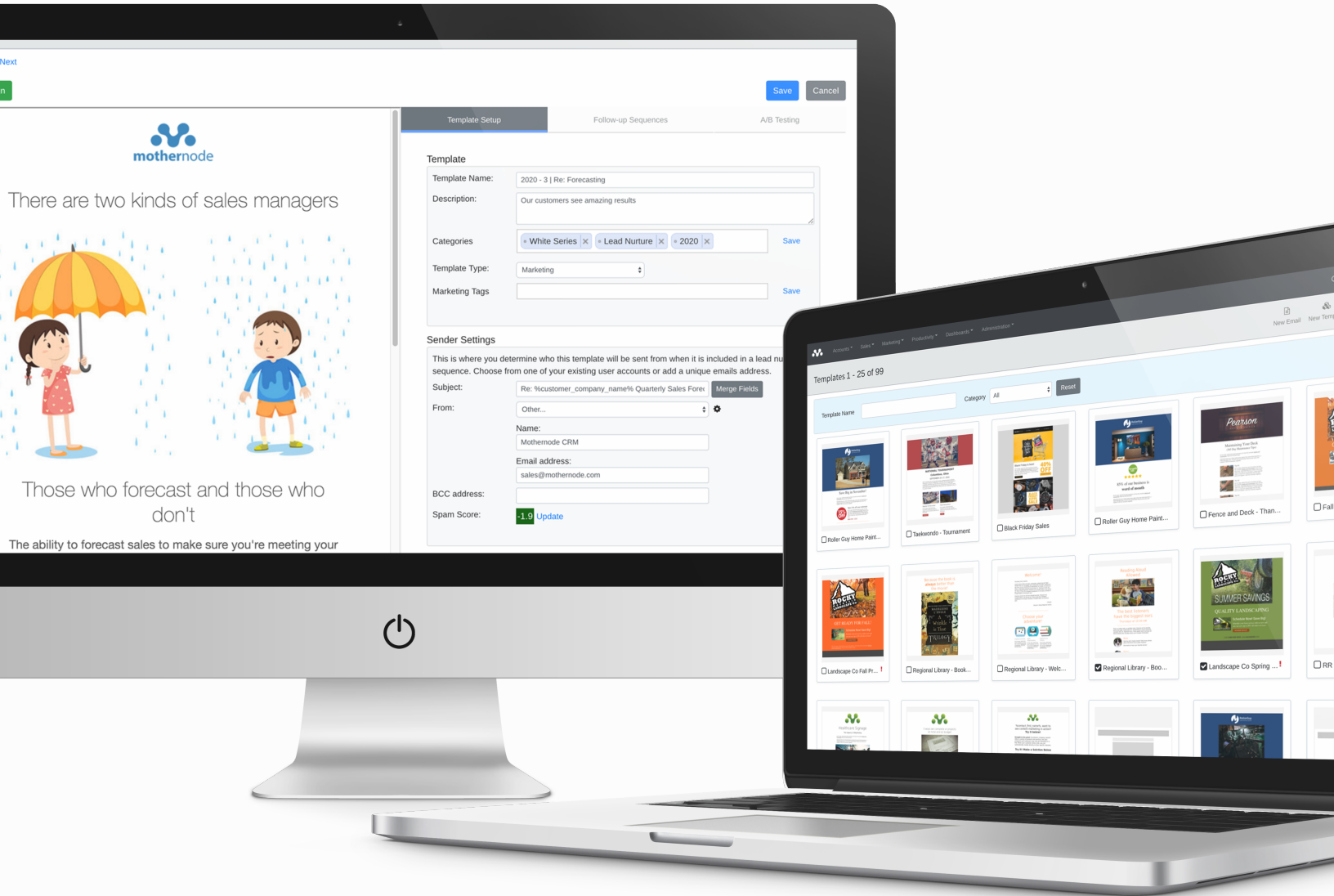
Simple to Setup

Get started immediately! Mothernode will generate every unique code for every website, blog or landing page you want to track. Simply install Mothernode's website tracking code by copying and pasting it in the header or footer of the sites you want to track, then sit back and wait!



Email Marketing

Unlimited Contacts | 25,000 emails per month



No design experience required

Features and Benefits

Learn more about Mothernode CRM and ERP editions and determine which one is right for your business. Mothernode editions are designed to grow with your business requirements, whatever they may be, and allows you to easily upgrade or customize your solution by adding the modules you need.

Productivity and Collaboration

Features	Description	Sales Team	Sales & Marketing	Professional	Enterprise
Dialogue™	Social media style collaboration and realtime notifications. Collaborate with your team more effectively.	✓	✓	✓	✓
Outlook Integration	Add-on for Microsoft Outlook†	✓	✓	✓	✓
Email	Send emails and files directly from Mothernode.	✓	✓	✓	✓
Calendar Subscriptions	View your Mothernode calendar events with your Outlook, iCal or Google calendars.	✓	✓	✓	✓
Notes	Journal your prospect and customer activity. Post comments to existing notes.	✓	✓	✓	✓
Events	Create and document important events for customers and prospects. Invite other users to participate.	✓	✓	✓	✓
Tasks	Create, assign and dispatch tasks to other users.	✓	✓	✓	✓
Smart Tasks	Create task templates that automatically create and assign themselves when records are created.	✓	✓	✓	✓
Email Notifications	Optional notifications to alert you of important real-time activity when you're away from your computer.	✓	✓	✓	✓
File Management	Upload files to customers, prospects and transactional records††	✓	✓	✓	✓
Activity Views	View a complete listing of system activity and keep informed of all user interactions	✓	✓	✓	✓
Import Records	Import prospects and customers from XLS files. Save mappings to reuse for recurring import activity.	✓	✓	✓	✓
Export Records	Easily export prospects, customers and contacts to Microsoft XLS files.	✓	✓	✓	✓

† Available for select Microsoft Outlook products

†† Additional storage sold separately

Reporting and Key Performance Indicators (KPI)

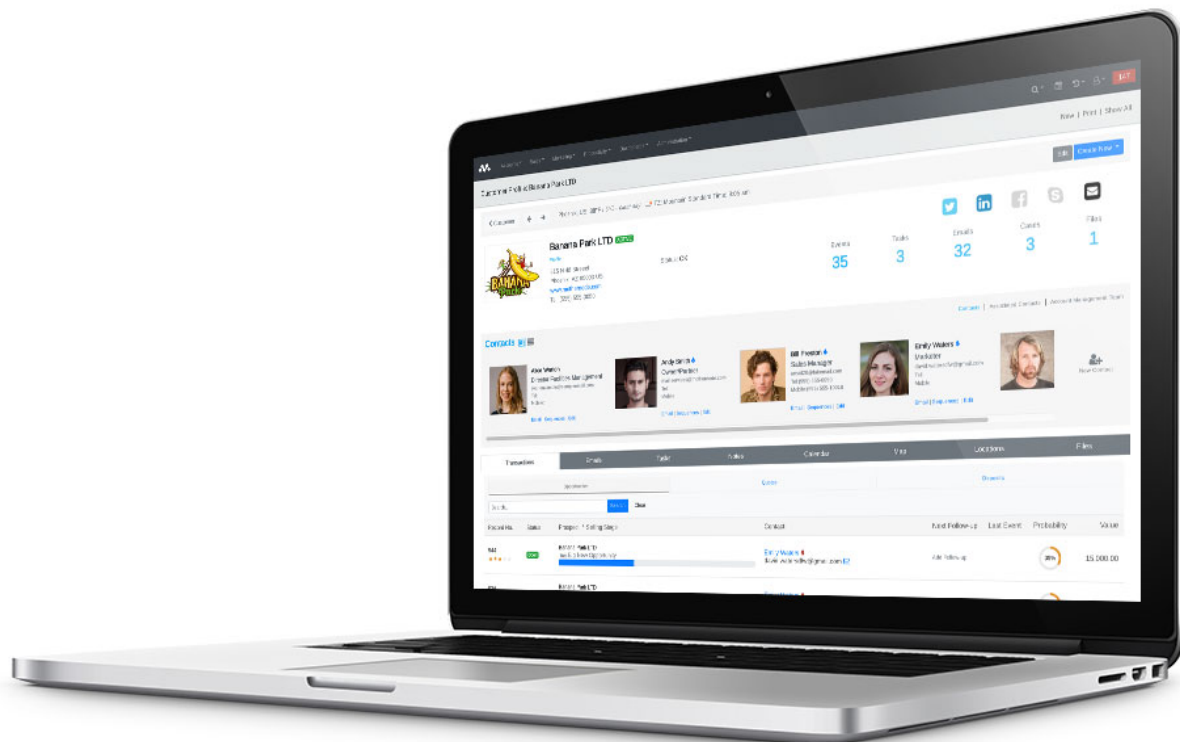
Features	Description	Sales Team	Sales & Marketing	Professional	Enterprise
Standard Reports	Run standard reports onscreen	✓	✓	✓	✓
Custom Reports	Create your own custom reports, share them with others and export them to Microsoft Excel.	✓	✓	✓	✓
Report Automation	Schedule auto reports for criteria you've specified and have them emailed to you.	✓	✓	✓	✓
System Reports	Generate system reports to track various activities.	✓	✓	✓	✓
KPIs	View essential dashboards for deeper insight into your business.	✓	✓	✓	✓
Sales Management	View forecasting and pipeline data. Discover sales trends and areas of strength and weakness.	✓	✓	✓	✓
Personal Goals	Set monthly sales goals for each sales rep.	✓	✓	✓	✓
Campaign Analytics	Create campaigns to track real-time revenue and ROI from your marketing initiatives.	✓	✓	✓	✓

Administration and Customization



Features	Description	Sales Team	Sales & Marketing	Professional	Enterprise
Customize Value Lists	Customize value lists to match your processes and business requirements.	✓	✓	✓	✓
Custom Fields	Create your own custom fields for modules, reports and transactions.	✓	✓	✓	✓

Features	Description	Sales Team	Sales & Marketing	Professional	Enterprise
Quoting Terms and Conditions	Add your order policies to quotes and estimates.	✓	✓	✓	✓
User Management	Easily manage your user accounts and their settings.	✓	✓	✓	✓
Account Management	Setup and manage your company profile.	✓	✓	✓	✓
Message Center	Author in application notifications to selected users.	✓	✓	✓	✓
System Defaults	Save data entry time, by adding system defaults for most common settings.	✓	✓	✓	✓
Session Activity	View user session activity and restore deleted records.	✓	✓	✓	✓
Permissions	Set access permissions for users.	✓	✓	✓	✓



DIALOGUE™ by Mothernode

Real-time notifications let you stay connected to your customer activity and improve collaboration - across the office or around the world.



John Kennedy

Comment (April 20, 2015 @ 2:33 PM)

Glad to hear the presentation went well. Do we have any news on when they'll be short listing their finalists?

Like | Comments (1)



Sarah Miller

Commented (April 20, 2015 @ 2:50 PM)

We've made the short list and have been asked to refine the pricing to include a 3 year agreement. Dave and I are working on that now.



John Kennedy

Commented (April 21, 2015 @ 10:09 AM)

Great work. We're changing some of our key suppliers next year, that will allow us to be more aggressive in our pricing. Let me know when I can review your updated offer and I can give let you know where you can be more competitive if you need to be.



Sarah Miller

Commented (April 21, 2015 @ 10:30 AM)

Fantastic! Looking forward to seeing you back in the office next week.

Comment

Post

Get Real-Time Notifications

- When other users post comments or notes to a contact, customer or transaction that you own or follow.
- When a new support case is opened for one of your customers or contacts.
- When orders ship and purchase orders have been received
- When someone emails or makes a calendar event for your customer or contact.
- When colleagues tag you in a note, event or comment.
- When transaction progress in the work flow (i.e. a quote becomes an order, or an order becomes an invoice.)

Mothernode

PRODUCT COMPARISON

Product Features	Sales Team	Sales & Marketing	Professional	Enterprise	Mobile
Customer Accounts	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Leads	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Smart Tasks	✓	✓	✓	✓	✓
Events	✓	✓	✓	✓	✓
Dialogue™ (Collaboration)	✓	✓	✓	✓	✓
Custom Reports	✓	✓	✓	✓	
Automated Reports	✓	✓	✓	✓	
Permissions	✓	✓	✓	✓	✓
Dashboards (KPIs)	✓	✓	✓	✓	✓
Products/Service (Lt. Inv.)	✓	✓	✓	✓	
Lead Capture Forms		✓	✓	✓	
Campaign Management		✓	✓	✓	
Vendor Management			✓	✓	
Case Management			✓	✓	
Case Forms			✓	✓	
Inventory (Advanced)				✓	
Quote Approval Automation	✓	✓	✓	✓	
Quotes	✓	✓	✓	✓	
Orders				✓	
Recurring Orders				✓	
Purchase Orders			✓	✓	
Work Orders				✓	
Invoices				✓	
UPS Online Integration				✓	
Quickbooks Integration	✓	✓	✓	✓	
Outlook Add-on	✓	✓	✓	✓	

Mothernode

PRODUCT COMPARISON

Product Features	Sales Team	Sales & Marketing	Professional	Enterprise	Mobile
Customer Accounts	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Leads	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Smart Tasks	✓	✓	✓	✓	✓
Events	✓	✓	✓	✓	✓
Dialogue™ (Collaboration)	✓	✓	✓	✓	✓
Custom Reports	✓	✓	✓	✓	
Automated Reports	✓	✓	✓	✓	
Permissions	✓	✓	✓	✓	✓
Dashboards (KPIs)	✓	✓	✓	✓	✓
Products/Service (Lt. Inv.)	✓	✓	✓	✓	
Lead Capture Forms		✓	✓	✓	
Campaign Management		✓	✓	✓	
Vendor Management			✓	✓	
Case Management			✓	✓	
Case Forms			✓	✓	
Inventory (Advanced)				✓	
Quote Approval Automation	✓	✓	✓	✓	
Quotes	✓	✓	✓	✓	
Orders				✓	
Recurring Orders				✓	
Purchase Orders			✓	✓	
Work Orders				✓	
Invoices				✓	
UPS Online Integration				✓	
Quickbooks Integration	✓	✓	✓	✓	
Outlook Add-on	✓	✓	✓	✓	

Mothernode

PRODUCT COMPARISON

Product Features	Sales Team	Sales & Marketing	Professional	Enterprise	Mobile
Customer Accounts	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Leads	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Smart Tasks	✓	✓	✓	✓	✓
Events	✓	✓	✓	✓	✓
Dialogue™ (Collaboration)	✓	✓	✓	✓	✓
Custom Reports	✓	✓	✓	✓	
Automated Reports	✓	✓	✓	✓	
Permissions	✓	✓	✓	✓	✓
Dashboards (KPIs)	✓	✓	✓	✓	✓
Products/Service (Lt. Inv.)	✓	✓	✓	✓	
Lead Capture Forms		✓	✓	✓	
Campaign Management		✓	✓	✓	
Vendor Management			✓	✓	
Case Management			✓	✓	
Case Forms			✓	✓	
Inventory (Advanced)				✓	
Quote Approval Automation	✓	✓	✓	✓	
Quotes	✓	✓	✓	✓	
Orders				✓	
Recurring Orders				✓	
Purchase Orders			✓	✓	
Work Orders				✓	
Invoices				✓	
UPS Online Integration				✓	
Quickbooks/Xero Integration	✓	✓	✓	✓	
Outlook Add-on	✓	✓	✓	✓	

Mothernode

PRODUCT COMPARISON

Product Features	Sales Team	Sales & Marketing	Professional	Enterprise	Mobile
Customer Accounts	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Leads	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Smart Tasks	✓	✓	✓	✓	✓
Events	✓	✓	✓	✓	✓
Dialogue™ (Collaboration)	✓	✓	✓	✓	✓
Custom Reports	✓	✓	✓	✓	
Automated Reports	✓	✓	✓	✓	
Permissions	✓	✓	✓	✓	✓
Dashboards (KPIs)	✓	✓	✓	✓	✓
Products/Service (Lt. Inv.)	✓	✓	✓	✓	
Lead Capture Forms		✓	✓	✓	
Campaign Management		✓	✓	✓	
Vendor Management			✓	✓	
Case Management			✓	✓	
Case Forms			✓	✓	
Inventory (Advanced)				✓	
Quote Approval Automation	✓	✓	✓	✓	
Quotes	✓	✓	✓	✓	
Orders				✓	
Recurring Orders				✓	
Purchase Orders			✓	✓	
Work Orders				✓	
Invoices				✓	
UPS Online Integration				✓	
Quickbooks Integration	✓	✓	✓	✓	
Outlook Add-on	✓	✓	✓	✓	

Mothernode

EDITION COMPARISON

Product Features	Sales Team	Sales & Marketing	Professional	Enterprise
Customer Accounts	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Calendar (+ Team Calendar)	✓	✓	✓	✓
Tasks	✓	✓	✓	✓
Smart Tasks	✓	✓	✓	✓
Events	✓	✓	✓	✓
Dialogue™ (Collaboration)	✓	✓	✓	✓
Custom Reports	✓	✓	✓	✓
Automated Reports	✓	✓	✓	✓
Permissions	✓	✓	✓	✓
Dashboards (KPIs)	✓	✓	✓	✓
Products/Service (Lt. Inv.)	✓	✓	✓	✓
Lead Capture Forms		✓	✓	✓
Campaign Management		✓	✓	✓
Vendor Management			✓	✓
Case Management			✓	✓
Case Forms			✓	✓
Inventory (Advanced)			✓	✓
Quote Approval Automation	✓	✓	✓	✓
Quotes	✓	✓	✓	✓
Orders				✓
Recurring Orders				✓
Purchase Orders			✓	✓
Work Orders				✓
Work Order Calendar				✓
Invoices				✓
UPS Online Integration				✓
Quickbooks / Xero Integration				✓
Outlook Add-on	✓	✓	✓	✓
Gmail Integration	✓	✓	✓	✓
Email Templates (Drag & Drop)		✓	✓	✓
Email Marketing		✓	✓	✓
Email Campaigns		✓	✓	✓
Marketing Analytics		✓	✓	✓
Website Visitor Tracking		✓	✓	✓
Event Registration		✓	✓	✓
APIs	✓	✓	✓	✓
Third-party Integrations		✓	✓	✓
IOS / Android App	✓	✓	✓	✓
Real-time Notifications	✓	✓	✓	✓
25,000 Emails/month		✓	✓	✓
Unlimited Customers	✓	✓	✓	✓
Unlimited Contacts	✓	✓	✓	✓

Mothernode CRM OUTLOOK INTEGRATION

All your CRM essentials in the application you work in most

Mothernode CRM's Outlook® Add-on let's you integrate important customer and sales activity with Microsoft Outlook® for Windows®.



Calendar Synchronization

Seamlessly synchronize Outlook calendar events with Mothernode customer, contact and opportunity calendar events and vice versa.



Contact Synchronization

Synchronize your Outlook and Mothernode contacts, so you and your team are always looking at the most current contact information.



Contact Events and Activity

Whether a new sale or a long-term customer, quickly access and update contact notes, events, emails, and more.



Archive In-Bound Messages

Click messages you want to file in Mothernode and Mothernode will attach them to the corresponding record.



Create New CRM Records

Effortlessly create new Mothernode Opportunities, Contacts and Cases directly from your Outlook client.



Mothernode plays well with

