

## **CRM & PMP**

A Leading Pipeline
Management Platform
& CRM for Sales and
Service Organizations.



# Mapping & Territories



Map data, plot territories, build density, add & pin accounts with a visual cartography of your business.

### **EasyDOCs**

Generate documents in seconds: Quotes, Proposals, Service Agreements, & more. Custom templates with e-signature, mobility, pricing tools & approvals –all built-in.



## Frontline Communication

Enable your Frontline Field Team, Op Staff, and Affiliates to generate revenue, foster growth within existing accounts, and enhance customer service & validation.



#### Rolodex

#### New!

A quick-access directory for finding contacts details. Get the best data intelligence, right in CRM: emails, names, and phone numbers in seconds.



### **Extra Pipelines**

Create pipelines around any process or project to seamlessly track. Custom stages for tickets, service, sales, asset, work orders, etc.



Reporting

Maintain CRM hygiene, import any data & receive automated reports.

## QR & Web Forms

Forms from your website flow into Wingmate. QR code enabled.



An invite-only service for our onboarded & thriving software clients, allowing them to tap into our lead qualification support.



A list of products and services Wingmate offers.

### Concierge Club

White glove support and access to webinars & unlimited training.

### Team Library

Store and share team documents, SOPs, etc. directly in Wingmate.

#### API Market



Access to 8,000+ integrations, such as **Gmail and Outlook**, with automatic email tracking.



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