PDI SPIRIT CRM Version 4
Features

Database format

Firebird 2.x RDMBS SQL database used for internal data stored within CRM version 4. Pastel data accessed directly requires a licensed and functioning version of Pervasive

Customer Functionality

Maintain Pastel customer information
Customer Physical Contact Details
Customer Multiple Delivery Addresses
User defined fields for Multiple Delivery Addresses

Contact History
Create and maintain activity and tasks for customer account and contact details

Document Repository
Maintain links to important documents for individual customers

Opportunities
Maintain sales opportunities for customers, with full notes, internal tasks, attachments, status, product charges and linked to invoiced documents

Internal Products
Create internal products and assign internal products to customer records. Can be used to track licensing information of non-standard products

Product Sales
Retrieve product sale information directly from Pastel

Customer Budgets
Maintain customer budgets based on item codes sold or customer category type

Customer Pricing
Retrieve Customer pricing directly from Pastel, maintain as required with global expiry date set

Pastel Documents: Quotations, Sales Orders, Invoice, Credit Notes
View Customer documents captured in Pastel directly within CRM. Click document to view full document details

Customer Balances
View customer balances directly from Pastel

Open Item / Balance Forward
View customer open item transaction, with allocations as required or in balance forward

Transactions
View the transactions for the customer stored currently in Pastel

Prospects

Maintain Prospect Information
Create prospects with multiple address details

Contact History
Maintain contact history and activity tasks for selected prospects

Document Repository
Maintain links to important documents for individual prospects

Opportunities
Maintain sales opportunities for prospects with full notes, internal tasks, attachments, status, product charges and linked to invoiced documents

Internal Products
Create internal products and assign internal products to customer records. Can be used to track licensing information of non-standard products

Convert Prospects
Transfer prospects and all created information to Pastel as customers

Suppliers

Maintain Supplier Information
Maintain Pastel supplier contact details. Create additional supplier contacts available from within CRM

Contact History
Maintain contact history and activity tasks for selected prospects

Document Repository
Maintain links to import documents for individual suppliers

Products Purchased
Retrieve purchases made from supplier into CRM

Preferred Supplier
Captured preferred supplier information along with pricing information, expiry dates, lead times , supplier product code and additional notes

Pastel Documents: Purchase Orders, GRN's, Invoices, Credits
View prospect documents captured in Pastel directly within CRM. Click document to view full document details

Supplier Balances
View supplier current balances directly from Pastel records

Open Item / Balance Forward
View supplier open item transaction, with allocations as required or in balance forward

Transactions
View the transactions for the suppliers stored currently in Pastel

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Sales Opportunities

Capture Sales opportunities for Customer and Prospects. Assign Tasks to opportunities

Attachments – add documents and attachments for use within the sales opportunity

Status of opportunity, completion date and notes on final completion

Create Charge lines using Item codes, remarks and GL Codes

Creating costing lines, linking to external supplier invoices, fees mark ups, charges

Create tasks and follow ups for opportunities

View invoices/sales orders created for sales opportunity, add additional from Pastel as required

Outlook Link – create project folders below a main project folder, where emails can be added to. View this folder and details directly from within the opportunity tab

Create Pastel documents – Invoices/Sales order for selected product/charge lines

Email basic quote to client indicating cost, basic details and expiry of quote

View All tasks for sales opportunities within a single grid

Contact Activity Tasks

View contact activity and tasks assigned to current user, all users and private entries within a single grid

View contact activity and tasks assigned within a simple calendar interface

Sundry Items

Mail Merge
Create word mail merge documents or email documents and send to customers, prospects and supplier details

Import / Export
Import Prospects
Import / Export Customers/Prospects
Export Customer/Prospects to Outlook Contacts

Customer Pricing
Create Customer pricing based on Customer category and discount structure

Customer Budgets
Customer budgets by Pastel item or based on values only

Reporting

Customer Age Analysis
Basic customer age analysis with notes taken from customer activity

Customer Listing – including activity/tasks as required

Task Listings – filter based on task / activity type and include users own notes only

Budget Reports
Accumulated Budget reports
Customer Budget Reports
Customer Sales Budgets
Prospect Sales Budgets

Customer Information sheet
List customer contacts, open activities, Top 10 items purchased

Prospect Listings – including activity / tasks as required

Sales opportunities
Summary List
Full List
Expected / Variance
Forecast by Employee
Over due
Sales Opportunity funnel

Internal Product Lists – list information captured on internal CRM products. For products assigned to a customer and expiring between a given date range