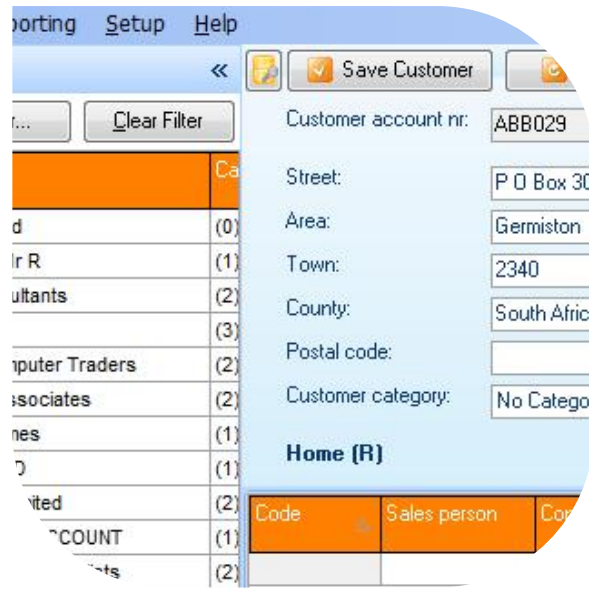# CRM for Sage Pastel

Links directly to your Sage Pastel Partner Accounting Data. No Export No Imports required

Maintain your customer, prospects and supplier information in a central place. Create multiple contacts for customers, prospects and suppliers with the standard information transferred straight back to your Pastel Partner Accounting (Xpress) data.

Create sales opportunities linked to customers or prospects and generate sophisticated quotes with multiple layouts and multiple page layouts per document. Link sales opportunities directly to campaigns or create sales opportunities from your campaigns.

Create tasks linked to customers, prospects or suppliers with reminders and allocated to definable categories with set interval days and linked to your own branch codes or those from Pastel Partner Accounting.

PDI Spirit LLC

Your local PDI Spirit distributor

CRM for Sage Pastel

Campaigns

Create sales campaigns with multiple stages and activities within each stage

CRM includes a campaign module that allows you to create your campaign not just for the calling, email blast or mail merge. But also allowing you to assign activities that need to be completed before the actual campaign is started. Assign activities to a user and once the user has completed the activity the next activity is started and the relevant user informed.

Campaigns have their own desktop showing the users list of activities, calls to make, products being sold on the campaign, sales opportunities created and full contact information for the customer or prospect.

Questions can also be included in the campaign if you are under taking customer surveys.

On-Line Module

PDI Spirit CRM mobile module

Our mobile module is its own self-contained web server, that uses the JQuery framework to create HTML pages that you can view on any mobile device web browser.

View your customer and prospect details, including contacts, outstanding balances, items sold. View and maintain tasks for yourself as well as open campaign activities assigned to yourself.

Create sales opportunities, retrieve sales opportunity documents, that can then be emailed from your mobile-device or printed to the clients printer.

The mobile pages and templates are fully customizable, so you can fit in with your corporate branding. The data is all kept on your server for security

Key features

- Direct link to Sage Pastel Partner. Information updated in Pastel is available within CRM, without the need to export/import.
- Create Tasks, linked to activities that can be emailed, reminders, follow ups.
- Create campaigns that can have multiple stages, prospects based on prior sales. Create emails, phone calls or letters.
- Create sales opportunities that can be converted into a quotation, sales order or invoice directly in Sage Pastel Partner.
- Create prospects with multiple contacts that can be converted in to a Pastel customer account without the need to recapture.
- Internal forms designer, allows your own reports to be created as well as creating sales opportunity forms and enhanced Pastel document form layouts
- Advanced cubing against Pastel or CRM data