Compass is very excited to announce the release of Sherpa, our newest product, built in Microsoft’s .NET programming language. Our Developers have spent over 2 years working on this amazing product, producing a software package with enhanced ease of use, productivity and many, many extras. We have added thousands of dollars worth of customizations to the program which allows you greater control. Below are some of the main enhancements to the program.

Rep Areas

- New and Improved Main Menu Screen
  - List of Today’s Activities
  - Forecasted accounts to close for the month
  - Last 5 Proposals created
  - Summary of all Completed activities for the month to date
  - Exportable Forecast Graphs
  - List of orders in each stage of Order Processing (if purchased)

- Accounts Area
  - Customizable & unlimited Vertical Marketing
  - Add Account form increased to include all pertinent information
  - Print Account has options to include Contacts, Activities, or Emails
  - Can assign as many reps as desired to an account
  - Office phone & fax now separate from contacts
  - Account Name holds history of accounts recently searched for ease of use
  - ERP now on main CRM screen as well as TCO screen
  - New and improved account search
    - Search by name
    - Search by zip
    - Search by phone
    - Search by county
    - Search by contact
    - Search by ERP#
    - Search by email
    - Search by Equipment ID
    - Export to Excel for Management and above
    - Bulk Activity creation (can create open or closed activity to all accounts)
  - Google map will map from multiple offices’ starting points to customer location
  - Filter ability greatly enhanced with many more options available to filter off of
    - New feature in filtering call Zeno Activity to see how many accts aren’t contacted
  - Merge Accounts has been simplified to allow for ease of use
  - New activities features
    - New urgent activity feature
    - Able to import activities/appointments from outlook
    - Single viewing screen for today’s activity vs the next action
    - Streamlined activity entry with auto-fill
    - Call back list reports run off filtered list

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8.5 To Sherpa Differences

- New Email notes features
  - There is a list of emails to save rather than only showing one at a time
  - Have the ability to save multiple emails at once
- New Module - Account Strategy (From “Strategic Selling” by Robert Miller, Stephen Heiman with Tad Tuleja)
  - Allows reps to strategize fully on any account, thus turning reps into strategic sellers
    - Identify the buying influences and their wins
    - Determine each account’s positioning in the funnel
    - Determine coaching information needed
    - Set an action plan
- Sales Stages
  - Amount of revenue forecasted shown under every stage
  - Sales Stage names are now customizable
  - Sales Stage report populated in order of stages
- TCO
  - Meter import will always keep the original date rather than replacing it.
  - New total values in the TCO
    - Total mono and color volume for entire TCO on main screen
    - Total CPP for the entire TCO for both mono and color on main screen
    - Total Costs for entire TCO on main screen
    - Total Monthly TCO cost for Mono & Color listed on Detail report for each machine
  - New Delete All feature
  - New calculate model only feature
  - Set business days metered which allows a more accurate monthly volume
  - Printer age is by years
  - Labor & Parts margin % for TCO editable
  - New capabilities for calculating Labor & Parts by model, all models or remove from all models
  - Button to remove all costs on a machine (for cpp deals)
  - Color costs auto-fill with the first one filled in
  - Sorting capability for TCO reports viewing
  - All TCO reports now built in Crystal
- Asset Strategy
  - New added volume feature to add volume or decease volume of current item
  - Ability to choose location and department when replacing an item
  - Change location button allows location change after part of proposed solution
  - New Check All feature
  - Volume on new models transferred to Product Configurator
  - Asset Strategy tied to each proposal allowing multiple strategies
- Printer Prizer
  - Import updated meter reads into the printer prizer
  - Individual models can now be assigned OEM rather than the whole printer fleet
  - Executive Summary available in Printer Prizer

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- **Product Configurator**
  - Ability to change the pricing levels after the machine is configured
  - Check boxes when configuring accessories
  - Quarterly and Annual billing now available
  - Minimum volumes listed for each machine
  - Pricing level names listed in drop down and customized by customer
  - Quantity for accessories changed automatically when main frame quantity changed
  - The change quantity and volume can be done on all models in one area now

- **Product Summary**
  - Drag and drop to reorder the list view of items

- **Executive Summary** is now a book marked, editable Word template as well as a Crystal report

- **Financials**
  - Has improved multi financials which can each be named
  - Ability to have different machine configurations for different financials in the same proposal
  - Buyout calculator lists each model separately
  - Percent of Retail (MSRP) now shown on main screen
  - Lease Admin Fee added
  - Improved bookmarks throughout the system (no limit to repeatability & more of them)

- **New Module – Multiple Leases**
  - Ability to assign multiple lease options to equipment, service & buyouts

**Administrator Areas**

- New update program allows users to receive updates without replacing their front end

- **Administration area**
  - New region settings
  - New account history setting
  - Ability to set default #’s of days to populate an activity prior to lease expiration
  - Control over margin to TCO for Labor & Parts
  - Ability to assign Accounts to specific regions
  - Control over Sales Stage names and Vertical Marketing
  - Ability to force reps to always have a Follow-up Activity
  - Outlook Contacts Export level of rights control
  - New EA transfer settings
  - Multiple ERP server capability if needed

- **Manage users**
  - New user interface to make it user friendly
  - Eight levels of security
  - Ability to set which manufacturers and pricing levels each rep can view
  - Ability to add more individual user information
  - Bookmarks for primary rep phone number and email available

- **User Quotas** now allow Managers to set graduating or set levels of Quotas for all reps

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- **Equipment Pricing**
  - Streamlined Add Model Feature – use information from an existing model
  - Ability to add existing accessories to a new model
  - 40 Pricing levels available with customizable names
  - Ability to print price book showing different options
  - Export and import equipment to excel to make changes
  - Service pricing table always visible when editing/adding equipment

- **Review Database Changes** shows all history in the database (deletions, adds, etc) for past 6 months

- **Printer Service Supplies Pricing**
  - OEM Margin setting separate from Compatible Margin setting
  - Ability to use existing printer information when adding a new model

- **Reports**
  - All reports have cleaner, streamlined more professional look
  - Summary available on Closed Sale and Forecast Reports
  - Equipment Reports available to reps for their territory
  - Company Reports available to reps for their territory
  - Ability to run reports by customized Vertical Marketing
  - Activity report with summary only
  - Summary listed at bottom of each activity report
  - New Crystal Reports

- **New Module – Order Processing**
  - Set up to 20 different Stages of Order Processing
  - Dashboard view of all stages in the Order funnel
  - Set which fields are required for a Rep to fill out when completing their Sales Paperwork
  - Keep track of the amount of money being held in each stage after the sale
  - Allows Reps to know where their deal is at any given time
  - Ability to add notes if a deal is held up for any reason
  - Gives a central location to access the sales paperwork, saving on printing and possibly losing documents
  - Ability to route each document to specific file paths when saved
  - Letter of Intent area

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