



Compass Administrator Training

Today's challenging sales environment requires that we not only work hard--we also have to work smart. Compass Sales Solutions has developed the tools to help your sales force work smart. And now we are proud to offer dedicated Administrator training to help you get the most from your Compass solution. Whether you're new to Compass or a long time user, the new Compass Administrator Training program teaches the skills that will help your dealership leverage the most value from your investment.

The seminar includes everything you need to:

- **Understand the technology driving the Compass application.**
- **Manage Users and set up access rights and territories.**
- **Get the most from your links to ERP, Outlook and Meter Devices.**
- **Update the Pricing Tables and add New Equipment.**
- **Create filters and run reports.**
- **Create and update Word and Excel Templates to automatically complete sales proposals and paperwork from the information in Compass.**
- **Allow Administrators to understand the TCO & solution process from a Sales Rep's perspective.**

Plus, you'll learn many other tips and tricks!



Administrator Training Class Agenda

CRM / Accounts

1. Understanding Microsoft Access Basics & Compass Synchronization Process or SQL
2. Assigning Users and Rights based on log-in
3. Setting up Divisions and Territories
4. Transferring Accounts by Territory, Zip Code or Rep
5. Discuss Importing Accounts from ERP link to CRM
6. Running Reports
7. Creating Filters
8. CRM link to MS Outlook

TCO Assessment

1. Understanding the Process from a Sales Rep's Perspective
2. Setting up and using the ERP link from OMD, E-Automate or LaCrosse
3. Using the Meter Read Import Utility (FM Audit, Print Tracker, Print Fleet)

HP Printer Pricer

1. Understanding the Process from a Sales Rep's Perspective
2. Updating the Pricing Table with your specific costs
3. Using the Export Templates

Product Configurator

1. Understanding the Process from a Sales Rep's Perspective
2. Updating and Adding Equipment to the pricing tables
3. Updating and Adding to the Service Table
4. Assigning Install and Connect Fees
5. Updating and Adding to the Lease Rate Table

Templates

1. Creating a New Word Template
2. Creating a New Excel Template
3. Updating Existing Templates
4. Using the Download File Features



Yes I would like to Register For the Administrator Seminar:



You will find this registration form at:

<http://www.compasscontact.net/register.html>

Restaurants within 1 mile of the Hotel:

BarDeNay's	Burger Den
Wendy's	Domino's
Quizno's	Ahi Sushi
Mai Thai	Zen Bento
Eagle Rib Shack	Rib Shack
Blue Moose Café	Pamela's Bakery
Road House BBQ	Pizza Hut
China Palace Fine Dining	Starbucks
McDonald's	China Palace
Busters Restaurant	Casa Mexico
Cheerleaders Sports Bar	Mongolian BBQ
River Rock Ale House	Subway
Red Hot Shack Deli	Cold Stone
Pizza Hut	Cupcakes
Chicago Connection	Rembrandt's
Smokey Mountain Pizza & Pasta	Round Table Pizza
The Original Pancake House	
Junga Juice	
Tully's Coffee	
New York Burrito	

Cost?

The cost to attend the 2 day seminar is only \$600 Per Person. Hotel & flight not included.

Where is the Seminar being held?

The seminar is being held at the Compass Sales Solutions office in Eagle, ID.

This location allows you to personally meet all your Compass Support Staff so that you can get the most from your training experience.

You will fly into the **Boise, ID (BOI) airport.**

You may book your stay directly with the **Hilton Garden Inn** at (866) 938-9600. They are located at 145 E Riverside Dr in Eagle, ID. They have a shuttle to and from the airport.

Book your hotel **at least** two and half weeks ahead of time for the best rates and ask for the Compass Corporate Rate. The hotel is located 2.8 miles from our office & books up quickly.

To Bring:

***A Lap-Top Computer with your Compass Software & Microsoft Office installed on it**

***Sample Proposals (in Microsoft Word format) that your sales team are already using**

***The paperwork on a deal that you or one of your reps has recently closed.**

Class will be interactive. You will be given a demo database to use during training if you wish.

***Are you interested in attending this training but can't make this date?
Please call us at 800-295-0411 to reserve your spot for our next class.***



Compass Opportunity Manager Administrator Training

Agenda

Title	Time	Location
Welcome	8:30 AM – 9:00 AM	Compass Sales Solutions
Computer Set-Up	9:00 AM – 9:30 AM	Compass Sales Solutions
CRM – User	9:30 AM – 10:30 AM	Compass Sales Solutions
Break	10:30 AM – 10:45 AM	
TCO/Financials	10:45 AM – 12:00 PM	Compass Sales Solutions
Lunch	12:00 PM – 1:00 PM	
TCO/HP Printer Pricer/Asset Allocation	1:00 PM – 2:30 PM	Compass Sales Solutions
Break	2:30 PM – 2:45 PM	
Group Exercise	2:45 PM – 4:15 PM	Compass Sales Solutions
Day 1 Wrap-up/Review	4:15 PM – 4:30 PM	Compass Sales Solutions

Title	Time	Location
Q & A and Review Meeting	8:30 AM – 9:00AM	Compass Sales Solutions
CRM – Admin/ Administrator Button	9:00 AM – 10:15 AM	Compass Sales Solutions
Break	10:15 AM – 10:30 AM	
Equipment Pricing	10:30 AM – 12:00 PM	Compass Sales Solutions
Lunch	12:00 PM – 1:00 PM	
Equipment Pricing	1:00 PM – 2:00 PM	Compass Sales Solutions
Break	2:00 PM – 2:15 PM	
Bookmarking in Word	2:15 PM – 3:15 PM	Compass Sales Solutions
Bookmarking in Excel	3:15 PM – 4:15 PM	Compass Sales Solutions
Day 2 Wrap-up/Review	4:15 PM – 4:30 PM	Compass Sales Solutions