



"Your Guide to Sales Success!"

Attention Sherpa Customers:

Please be advised to contact Compass Sales Solutions support team prior to moving to the hosted cloud solution offered by eAutomate. There are some integrations currently not available from what is offered in our full eAutomate on-premise integration.

Compass does offer an ESN integration in Sherpa with partial access to equipment and contract information. You can view basic customer and equipment info, view contract details, and transfer the equipment information to the TCO on the current open account in Sherpa.

Other functionality (as listed below) is **NOT** currently available in the ESN eAutomate interface within Sherpa.

- Account Search, Lease Search, and Contract Search
- Ability to browse to other accounts
- Group Bill, Meter History, Account History, Service History, Service Call Count, Meter Detail, and Client Service Calls buttons/reports
- Submit to eAutomate from Financials
- Lease Tracker > Search ERP for ERP #s
- Ability to transfer accounts from eAuto to Sherpa (Admin > Control Panel > ERP tab)
- SherpaGo access to ERP data
- eAutomate bookmarks that populate from the Financials Excel button
- eAutomate data pulls in Navigator

Questions?

Please feel free to contact us at development@compasscontact.net for additional information.

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