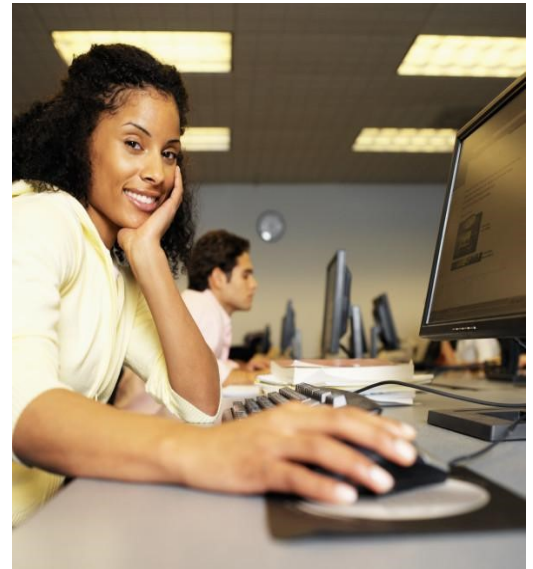


# Compass Administrator Training

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. 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 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:

- ✓ **Train and Assist New users and understand the TCO & solution process from a Sales Rep's perspective**
- ✓ **Manage Users and set up security and territories**
- ✓ **Get the most from your links to ERP, Outlook and Meter Devices**
- ✓ **Update and create pricing for both MPS and Hardware, using our new user friendly Export and Import features**
- ✓ **Import MPS pricing from your Suppliers**
- ✓ **Import your Lease Portfolio for quick access to current leases and lease expirations**
- ✓ **Create and update Word and Excel Templates (Bookmarking) to automatically populate sales proposals and paperwork from the information in Compass**
- ✓ **Best Practices Guidelines**



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

# Administrator Training Class Agenda

## CRM / Accounts:

1. Creating and Completing Activities
2. Assigning Users and Security Rights
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 your ERP (OMD, E-Automate, etc)
3. Using the Meter Read Import Utility (FM Audit, Print Tracker, Print Fleet, etc)

## Printer Pricer:

1. Understanding the MPS Process from a Sales Rep's Perspective
2. Updating the Pricing Table with your specific costs
3. Importing your costs from your Suppliers



## Product Configurator:

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

## Proposal and Sales Templates:

1. Creating New Word and Excel Templates
2. Updating Your Existing Templates

## Additional Modules:

1. Order Processing
2. Lease Tracker
3. Intelligent Device Mapper
4. SherpaGo

## To Register For the Administrator Training:

Contact the Compass Training Team at [training@compasscontact.net](mailto:training@compasscontact.net)

### Cost:

The cost to attend the 2 day seminar (if not already paid for in original software purchase) is \$800.00 per person. Travel expenses are not included.

\*Training must be used within 3 months of receiving software (for new customers) or within 3 months of purchase of training (current customer).

### Event Location:

Located in the heart of Orange County CA, and located near the John Wayne / Santa Ana Airport (SNA). You may book your accommodations directly with the event Hotel, or with any of the other nearby Hotels; most Hotels have a Shuttle available from John Wayne Intl. Airport. Reserving a rental car is up to you!



Other Attractions near the Event: □

Many local restaurants

- Disneyland / Down Town Disney
- Angel Stadium
- Beaches
- Theme Parks including Knott's Berry Farm & LegoLand □ Catalina Island

### What To Bring / Dresscode:

- A Laptop Computer with Compass Software & Microsoft Office installed □ You will be given a demo database prior to the class to use during training □ There is no dresscode for attendees - Come to learn!

\*Please note that due to circumstances beyond our control including low attendee count the event maybe rescheduled at any time up to one week prior.

*“The 2 Day System Administrator Training was a great class and we loved the California location. The Instructor kept a great pace and repeated everything perfectly so nothing was missed. Well worth the time spent out of the office! I would highly recommend attending as part of your Compass Implementation”*

*Raven Monnig, Consultant  
Impact Networking*



*“The Admin training was more helpful than I could have imagined! I doubt that our company would have been able to take advantage of all of Compass’ benefits without it. Well worth it!”*

*Samantha Brodt, Director of Financial Services  
Document Technologies*



*“I really enjoyed Compass’s 2 Day System Administrator Training! At the beginning of the 1st day I was a little nervous about rolling out Compass Sherpa. Thanks to the wonderful Instructor, I was much more comfortable by the end of the 2nd day and could immediately see the tremendous value in the product! The class was small enough to allow for questions and interaction between students which I found very helpful. The course materials are wonderful and will serve as a great reference for us down the road. I would highly recommend this course to anyone preparing for an implementation or even as a refresher post implementation.”*

*Bob Proto, IT Manager  
1Touch Office  
technology*



*"I've had the opportunity of working with multiple people on the Compass Training Team and they are all extremely knowledgeable and proactive in making sure both our Sales and Admin teams have what they need to succeed. The hands on approach they take and their passion for the product really makes a difference"*

*Colton King, Compass Administrator  
Tascosa Office Machines*

