

## Sherpa Announces DocuSign Integration!

**Boise, ID (June 2018)** – Compass Sales Solutions, the industry leader in sales opportunity software, is happy to announce their latest integration with DocuSign enabling users to send and receive electronically signed agreements and store them within your Sherpa database, assisting with automating the agreement process.

Integration with DocuSign will allow Sherpa users the ability to seamlessly manage the secured digital signing of proposals with recipients outside of an organization. This partnership will help Sherpa users automate back-end document processing to eliminate manual rekeying of data and associated errors, reduce operating costs associated with paper, ink, faxing, and mail, and also increase customer satisfaction with the convenience of signing agreements anytime, anywhere, on any device.

With this integration users will be able to:

- Save generated proposals from Sherpa to Document Storage and send directly to DocuSign at the same time.
- Select from a list of contacts on the current account in Sherpa to set DocuSign recipients and signers.
- Auto-launch DocuSign in your web browser with your document loaded and recipients in place, allowing the user to quickly add signature fields as needed and send the document.
- Access DocuSign documents within a tab on the account in Sherpa. Use this tab to view documents sent, check the status of those documents, or download the final copy of the document if desired.

Even if you don't use DocuSign, new enhancements to our Document Storage feature will make editing and saving your documents quicker and easier. If you populate a template from Sherpa or open a Word or Excel document from the Documents tab in Sherpa, you can now make edits needed on the document and choose to save your edited document directly back to Document Storage. No more saving the edited document locally and having to re-upload to Document Storage!

Tami Dittmore, VP of Operations for Compass, says, "We are excited about this new feature and bridging the gap between populating your custom document in Sherpa and getting the final signed agreement. The addition of DocuSign as an e-signature option will enable users to have a turnaround time on document collaborations in minutes rather than days and improves productivity and efficiency."

Customers who would like to learn more about pricing and availability of the new DocuSign module please contact your sales representative, [sales@compasscontact.net](mailto:sales@compasscontact.net).

### **About Compass Sales Solutions:**

Since 2001, Compass Sales Solutions has been the leading sales force automation provider for the office technology industry in 8 countries with over 13,000 users. Compass Sherpa provides a comprehensive suite that automates all aspects of the sales process and allows your sales professionals to utilize one tool to manage their sales goals completely. This includes prospect/client identification, Outlook integration, product configuration, proposal generation, MPS analysis and mapping, ERP integration, and mobile access via smartphones and tablets. Compass Sherpa will be the tool your team will **want** to use, not **have** to use.