

Compass Sales Solutions Announces Enhanced Microsoft Outlook Integration!

Boise, ID (June 2017) – Compass Sales Solutions, the industry leader in sales opportunity software, is proud to announce an enhanced Outlook Sync integration. This latest enhancement provides users with improved bi-directional syncing of emails, contacts, and appointments.

The enhanced Outlook Sync integration allows for the same syncing of contacts, emails, and calendar appointments between Sherpa and Outlook that was previously available, but the new release also offers significant speed improvements, syncing of sent emails, and additional customizable sync settings. Users can now choose when and how often Sherpa and Outlook sync automatically, or users can opt to only sync when they click “Sync Now.”

Calendar appointments in Outlook can be synced to an activity in Sherpa, or vice versa. Syncing an activity or calendar appointment will update the basic appointment information in both systems if it is edited in either. Syncing contact information is also available from either Sherpa or Outlook and will update both systems, reducing duplicated work by only having to update the information in one place. Users can also select contacts to automatically save all emails to and from that contact to Sherpa, saving time and building an automated record of email correspondence. Individual emails can also be queued to sync from Outlook and will save to a selected account record in Sherpa.

“Adding the ability to automatically sync sent emails to customers and prospects is a big time saver for sales teams, and the speed improvements for syncing make the tool easy to use,” says Tami Dittmore, VP of Operations at Compass Sales Solutions. “We are excited to release this enhanced integration to increase sales rep efficiency and communication tracking in Sherpa.”

Outlook Sync is compatible with Outlook 2007 or higher. For more information about Outlook Sync, email our training team at training@compasscontact.net or visit our website at www.compasscontact.net to view the video and download the user guide.

About Compass Sales Solutions:

Since 2001, Compass Sales Solutions has been the leading sales force automation provider for the office technology industry in 4 countries with over 10,000 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 completely manage their sales goals. 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.

