

## Compass Sales Solutions Announces Enhanced Submit to E-Automate Options!

**Boise, Idaho (December 2017)** Compass Sales Solutions, the industry leader in sales opportunity software, is excited to announce new enhancements for submitting quote information to E-Automate, including the ability to submit line-item pricing and three different options for how quotes are created in E-Automate.

Submitting a quote to E-Auto now allows you to send final line-item pricing from Sherpa to E-Auto, rather than just the cost. The line-item price will include profit margins and other pricing edits added in Sherpa's Financials, resulting in an E-Auto quote that fully reflects the final pricing and figures.

In addition to sending accurate line-item pricing, you will also have three different options for quote creation when submitting to E-Auto. You can still submit the entire Financials to E-Auto as a single quote, or you can use Movement Forms to gain two new submission options – by location or by configuration.

Location quote creation will let you set your ship-to locations for each item in Movement Forms and then create one quote in E-Auto for each unique location. This is a great option for submitting quotes to each child account in E-Auto if desired.

Configuration quote creation will create one quote in E-Auto for each main model. This offers a quick way to get a multi-machine deal submitted to E-Auto, cutting down on manual data entry.

For both location and configuration quotes, Sherpa will calculate the line-item pricing for each item and allow you to make any adjustments necessary to this line-item price, as well as to Install Fees, Connect Fees, and Buyout Charges. The totals must match up to the totals from your Financials, but you can edit the distribution across items as needed. This allows greater control over the data submitted to E-Auto, further ensuring accurate quotes with minimal work.

Troy Casper, President of Compass Sales Solutions states, "We have heard many requests to be able to send line-item pricing to E-Auto instead of cost, so we are very excited to offer this feature and simplify internal processes for quote creation. The different quote formats by location and configuration are icing on the cake for allowing greater flexibility and accuracy in E-Auto quotes submitted from Sherpa."

For further information, please email [training@compasscontact.net](mailto:training@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 eight 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 now.