



Sherpa Administrative Managed Services

Outsource the busy work; enjoy the ROI

Administrative Subscription is an option for customers who want to outsource all administrative aspects of the software platform. This package helps customers with the technical aspects of managing the software, keeping the platform current in supporting your business needs both today and in the future, and perform routine administrative functions (creating dashboards, adding users, changing permissions, training of new functions / users and more).

An Administrative Subscription will enable you to best optimize your company resources without needing to invest in the management and configuration of the platform.

About White Cup

White Cup offers data-driven selling technology that makes selling smarter, faster, and easier for distributors. White Cup's industry-specific CRM, Business Intelligence (BI), and Pricing products drive revenue, improve profits, and reduce overall costs. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.

To learn more about how the White Cup team can help managing your White Cup software easier, email managedservices@whitecupsolutions.com



Visit whitecupsolutions.com to learn more.

Sherpa Administrative Managed Services

The following services are offered for scheduled service:

User Management

Changes to users that will need to be specified in advance of maintenance session

- » Addition and setup of new employees
- » Removal or deauthorization of former employees
- » User permissions, security levels and template administration (team structures, user quotas, activity benchmarking, etc)
- » General management of settings found under the administrative section for user management

Territory Management

Changes to territory and account assignment that will need to be specified in advance of maintenance session

- » Creation, updating or modifying existing territories according to information provided by your team
- » Bulk account assignments as needed for either adding primary, secondary, or removing reps from accounts through the bulk assignment tool

Lease Tracker Management

- » Lease portfolios / maturity reports that are sent to our team will be prepared for Lease Tracker
- » Lease Tracker mappings will be created or updated as necessary to accommodate reports in valid format
- » Updates will be applied for all leases found with matching accounts; any leases that are not able to be matched through serial number and EAutomate lookup to an existing account will be exported and provided to the customer
- » Reconciliations to find expired leases no longer included in leasing company reports

Account Imports

Create new accounts with your provided lists and set it up in a workable format

Promo Updates

Setup of promotions for either manufacturers or individual machines based on your specifications

Quarterly Reviews

Ensure that your administrative needs are covered by your professional services plan

A 30-minute meeting at the end of each quarter will be used to discuss the current coverage, plus any additional time needed to accomplish additional tasks or changes in the upcoming schedule for maintenance.

Advanced Feature Setup & Maintenance

- » Cross training to build administrative knowledge as needed
- » Monthly Health Check maintenance
- » Best practice suggestions for better utilization

Miscellaneous Support

Additional time is allotted to ensure that all of the administrative tasks involved with each of these services can be taken care of. The use of this time will be agreed upon during the Quarterly Review preceding the scheduled miscellaneous services timeslot.

Miscellaneous Services are restricted to Administrative Services and are not eligible to include project work that would normally fall under a separate service or that would be completed as a one-time paid project such as equipment pricing preparation or bookmarking.

UCC Filings Updates

Import provided files into Sherpa

- » UCC Filing import through Sherpa tool using records provided by customer

Reporting

Selection of any of the following reports

- » Forecasts
- » Closed Sales
- » Team Sales
- » Multi-Team Sales
- » Vertical Market Reports

Program Options



Net New

A great choice for keeping your Sherpa Equipment Pricing list up to date with the newest machines that are released by your manufacturer. Don't fall behind on adding the latest models to Sherpa so your reps can sell them.



Quarterly Maintenance

If you have too many hands in the pot, experience high turnover, or are struggling with administration of your equipment pricing in Sherpa, our Quarterly Maintenance Program will keep your system current month to month.

