

Compass Terms and Definitions

ACTIVITY – is used to document activity creation and usage across all objects of the CRM. It will help in centralized tracking of client interactions, task and workflow management, improving customer relationship, collaboration and increasing efficiency and accountability

ACTIONS – allows you to update records, send communications, start and stop Automations, or notify team members (if you are part of an agency). Some examples of actions include scheduling activities, modifying automations, update or change a tag and sending emails and/or text messages

AUTOMATION – Automations allow you to automate and personalize your customers' journey. Automations can be used to follow up with leads, remind customers of other purchase opportunities, remind team members to contact a lead, and even send a customer a happy birthday message!

- Automations streamline customer journeys, making Compass a more powerful and versatile tool. Automation features simplify and enhance customer relationship management by providing highly customizable workflows, allowing businesses to nurture leads, manage contacts, and personalize customer interactions efficiently. This ultimately leads to better engagement, improved team collaboration, and enhanced customer satisfaction

CONDITIONS – allows you to filter Automations to only include the correct contacts. Conditions split Automations into two paths. If the contact matches the conditions set, they will proceed down the "Yes" path. Otherwise, they will proceed down the "No" path

DASHBOARD/DASHLETS – Dashboards are a powerful tool used to consolidate Compass data insights. Dashlets can be organized into a separate dashboard for specific roles or reporting purposes

DELAYS – are steps in an Automation that allow you to control when the next step occurs. A common example of a delay is waiting 24 hours after a contact has opened an email, before sending them a follow up email. You can customize and edit these as you see fit

GOALS – is similar to Triggers. With goals, your Automation will wait until something happens and won't continue down the path immediately, like when using a Condition.

- The record will be assessed as Goal Met or Goal Not Met, when they reach the Goal Step in your Automation. When reaching the Goal Step, the automation will only go down one path. You can always setup a second Goal if multiple need to be met

OBJECTS (AGENCIES) – Compass’s standard objects include Contacts, Companies, and Products. Often times, these are all the objects a company needs to get their account setup. If different objects are needed to fit your business operations, you can setup Custom Objects. Custom Objects allow you to store any type of data in Compass

- Custom Objects can be created as Standard Objects or Workflows/Pipelines to store unique pieces of information. Custom Objects can be paired with Custom Fields to track all the most important pieces of data

PIPELINES – Pipelines, or workflows, make it easy to track and measure sales opportunities, client projects, and other internal funnels. Pipelines are fully customizable

TIMELINES – timelines act as an audit log of the various activities, updates, and automated actions that have taken place

TRIGGERS – are the first step in creating your Automation. Some common examples of triggers are when activities are logged, past due, a new contact has been created, field updates on your portal, if you add or remove a tag from a contact, when forms or surveys have been submitted, and even when you have received an email from a contact

UNIQUE IDENTIFIER (UID) – Completely unique piece of information that distinguishes one entity from another. In Compass, Email Address = Unique Identifier. Which means Compass uses the email address to verify and match records when uploading or sharing data. (Ex. Can have two clients named John Smith but there can only be one ‘johnsmith@gmail.com’ email address.)

For more information about alternative UID’s, contact us at Compass@GordonMarketing.com

TAGS – Tags are a way to group your clients. They can be added and removed at any time either on an individual basis or in bulk.