



## SUMMARY OF INTEGRATIONS

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# Summary of Integrations

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## Referral Agency Integrations

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### **A Place for Mom**

With this integration, representatives at A Place for Mom can send new leads directly into the On Deck section of a community's Base Camp. From the On Deck section, a Sherpa user can easily navigate to a lead's profile and review the information provided.

### **Caring.com**

This works similar to the above integration, in which new leads from Caring.com are sent directly into a community's On Deck section.

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## Marketing Automation Integrations

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### **BlueSpire Marketing**

With this integration, any form on a company's marketing website ("Contact Us" form, i.e.) created by BlueSpire can flow directly into the On Deck section of a community's Base Camp. Specifically, leads can flow into one or multiple communities depending on what is selected by the inquirer.

### **HubSpot**

This integration allows HubSpot forms on a company's marketing website to flow directly into the On Deck section of a community's Base Camp. Similar to the above integration, leads can flow into one or multiple communities based on what is selected on the original form.

Specific tasks can also be scheduled in a community's Base Camp, based solely from an online form. For example, if a prospective resident completes an online form to schedule a tour, this integration will then create the tour in the community's Base Camp with the designated date and time.

Finally, Sherpa can pass updated information about a prospective resident into a company's HubSpot account, including updates to that individual's Status and Stage of Change.

## **MailChimp**

This integration allows users to pull up existing lists from a MailChimp account, as well as export contact information into such lists, without ever having to leave Sherpa.

These options exist through the Bulk Actions modal, which allows Sherpa users to record bulk mail outs and email outs for prospective residents and their influencers. For example, if a MailChimp campaign is created for all Active prospects in Sherpa, a user can both export these prospects into MailChimp and create a bulk action for these individuals, all from the same interface.

## **Yardi Marketing**

The Sherpa to Yardi integration allows users of both systems to easily transmit general demographic data from Sherpa into Yardi when a sale or deposit is recorded for a prospective resident (with a dollar amount greater than \$0.00).

Specifically, when a sale or deposit is recorded, the prospect and associated influencer(s) will be created in Yardi as a web lead. If applicable, unit information will be added to the new Yardi lead as a note.

## **Company Website**

Similar to many of the above workflows, this integration allows for custom-built forms on a company's marketing website to flow into the On Deck section of a community's Base Camp.

**Act-On** *(Coming Soon)*

**Absorb** *(Coming Soon)*

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## Health Management Integrations

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### **ALIS**

When using both platforms, this integration allows users to send prospects directly into ALIS by scheduling an Assessment in Sherpa. This will not only send over all demographic information for that prospect, but also schedule the assessment in both Sherpa and ALIS. This action will also create a new window in the shared prospect's Sherpa profile, allowing the user to easily view any ALIS updates for that prospect.

An extensive list of updates for all prospects can also be viewed through the Partner Updates page in Sherpa.

### **PointClickCare**

With the PointClickCare (PCC) integration, users have the ability to send a prospective resident's demographic data directly into their PCC account. Users have the option to send this information when adding a prospect in Sherpa, or when recording a deposit or sale for that individual.

### **MatrixCare** *(Coming Soon)*

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## Business Intelligence Integrations

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### **Microsoft Outlook**

The Sherpa and Microsoft Outlook integration will sync calendar events, tasks, and email correspondence aimed at increasing the selling power. Microsoft Outlook 2013 and up are supported.

### **Zillow**

Enabled as a base feature of Sherpa, our Zillow integration ties directly to a prospect's or influencer's address and offers Leasing Counselors valuable data and knowledge about their residence.

## **Google Maps**

The Google integration embeds interactive and custom Google Maps directly into a prospect's or influencer's profile in Sherpa.

## **White Pages**

Sales counselors who do more discovery on their prospects benefit from higher conversion ratios. Sherpa's White Pages integration gets the search started with the ability to connect a chosen prospect with available information on their immediate and extended family.

## **Facebook**

Available for prospects and influencers, the Facebook integration allows users to quickly access an active Facebook account associated with prospects and influencers.

## **LinkedIn**

A great research tool for prospect planning, our LinkedIn integration allows users to quickly and easily access an existing LinkedIn profile with one click in the system.