AUTOMOTIVE INC

Workspace: https://qar-automotive.saphyte.cloud/

Username: demo@saphyte.com

Password: Saphyte2021

Email: demo@saphyte.com

COMPANY OVERVIEW

AUTOMOTIVE INC was established to serve individual customers in the following areas:

- Selling of New and Refurbished Vehicles
- Selling of Automotive Spare Parts and Accessories
- Provide Automotive Services for all vehicle types

1. Team and Workspace

Users	Roles	Restrictions	Department
Chad	Service Technician Manager	- No access to WF and billing - No access to Forms - No access to Campaigns	Maintenance Services
Larry	Sales Managers	- No access to WF and billing - No access to Forms	Sales
Rob			
Chris	Super Admin	Overall Access	N/A (Owner)

- Service Tech Manager will be solely managing the Maintenance and Services Department. If a service request is received, he will manage client details + booking schedule. At the same time, he will assign a service tech to work with the customer.

  Service Technicians
  1. Mike
  2. James
  3. Chase

- Service Tech Manager to create deals and monitor the stages for every service request received with confirmed booking.

- Sales Managers will be responsible for all leads assigned to them. Sales managers will be focused on the car sales cycle only.

- Sales Managers to qualify the lead (identify salary bracket etc.), as soon as it's qualified, then convert the lead to prospect and create/start the deal process until the stages are completed. As soon as it's a close deal, convert it to a customer.

- Sales to offer additional services and accessories to the qualified clients.

2. Client Management

- **Categorization** – Set up categories according to company's products and services:

    1. BRAND NEW CAR
    2. REFURBISHED CAR
    3. MAINTENANCE SERVICES

    Pitch: Saphyte adapts to your business processes by providing you with the ability to set custom categories, statuses, and sub-statuses for easier categorization of your clients. This will also be useful for targeted email marketing where you can easily send marketing materials according to your client categories.

- **Lead Sources**

    1. Referral
    2. Inbound
    3. Calls
    4. Company Website
    5. FB
    6. Instagram
    7. Email Marketing

- **Custom Fields**

    Pitch: On top of the general attributes stored in the system, any additional info essential to your business process can be captured through a custom field. In addition, Saphyte allows you to section and rearrange your custom fields accordingly.

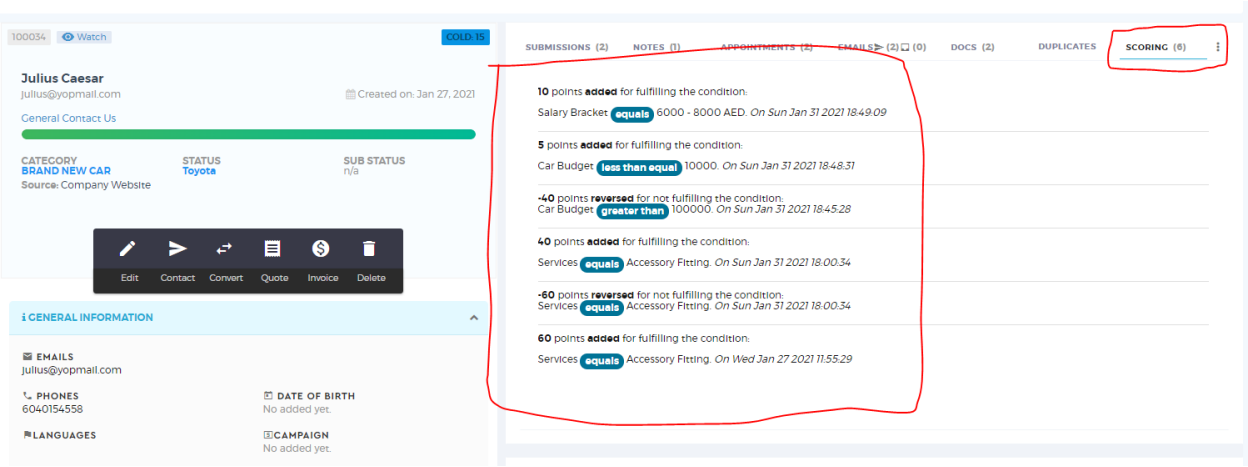
- **Lead Scoring**

    Pitch: Ditch the pen and paper and manual work. Lead Scoring functionality will allow you to score your leads according to your set criteria to identify client's eligibility or whom to prioritize. The higher the score, the greater potential to convert your lead to be your customer.

    Demo: Fill in the below-mentioned custom fields to generate a lead score

    - Salary Bracket
    - Car Budget

Navigate to the Scoring logs to track the point system



3. Forms

Form Name	
Request a Quote - Buy a Car	WF available
Contact Us	WF available
Get a Quote - Services	WF not available

4. Workflows

Auto Assign Sales managers

- Regardless if it was an incoming lead from web forms, bulk upload or manual entry, it will automatically assign a sales manager to a lead
- Notification email for a new lead will be sent to Sales Manager
- Notification email for a new lead + the assigned manager will be sent to Director

Request a Quote - Buy a Car

- Client to fill out the **Request a Quote – Buy a Car** form and system will categorize the lead according to the selected option - if he is looking for a BRAND NEW or a REFURBISHED car.
- Notification email for a new lead will be sent to Sales Manager
- Client will receive a notification/welcome email.

General Contact Us

- Client to fill out the **General Contact Us** form and system will categorize the lead according to the selected option - if he is looking for a BRAND NEW CAR / REFURBISHED CAR or MAINTENANCE SERVICES.
- Notification email for a new lead will be sent to Sales Manager product selected is for BRAND NEW CAR or REFURBISHED CAR
- Notification email for a new lead will be sent to Service Tech Manager if service selected is for MAINTENANCE SERVICES.
- Client will receive a notification/welcome email.

PROMO - The biggest auto sale

- WF set up for email marketing sample
- Marketing emails will be sent in sequence:

  1st email – 1st of the month:

  2nd email – on the 7th day

  3rd email – on the 14th day

5. Pipeline and Deals

Car Sales

Stages: Eligible Clients □ Negotiation □ Quotation □ Order Confirmation □ Generate Invoice □Payment Collection □ Close: Won / Lost

- Sales to create a Deal when a client is deemed eligible via eligibility check – e.g.:Salary Bracket.
- Car Sales pipeline will be used to manage and track Car Sales cycle
- Sales Managers are to work on this pipeline
- Hierarchy set up per Sales person for easier sales report monitoring

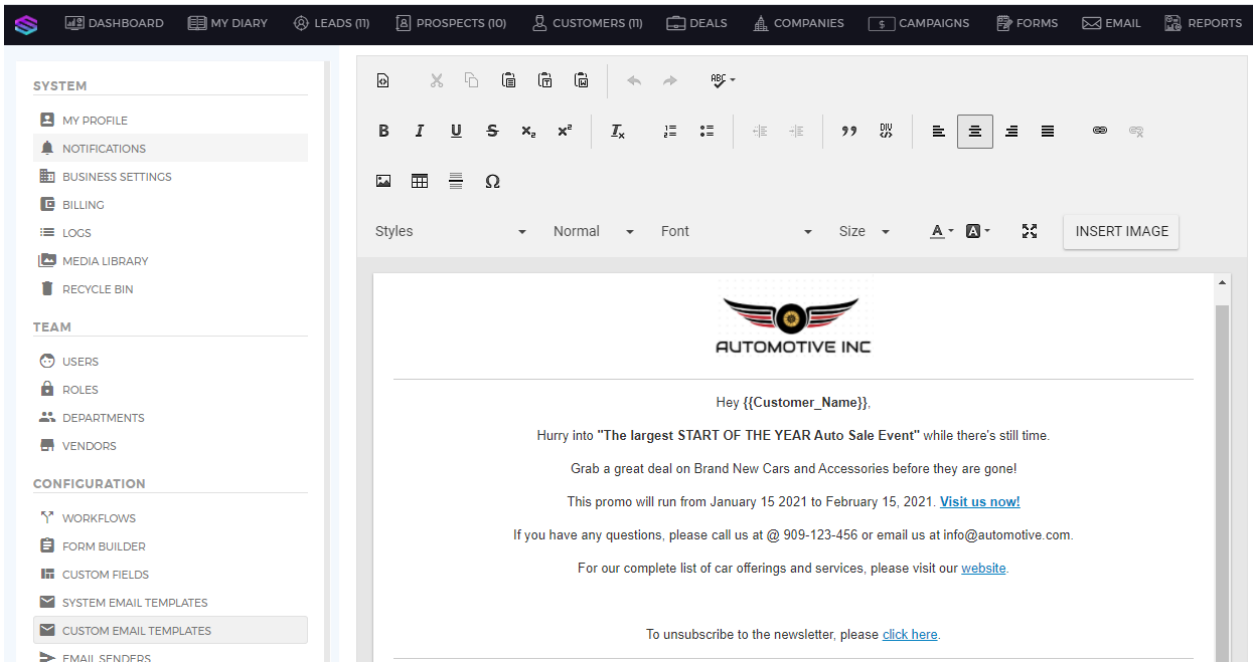
Service Maintenance

Stages: Confirmed Booking □ Client Visit □ No Show □ Rescheduled Visit □ Close: Won / Lost

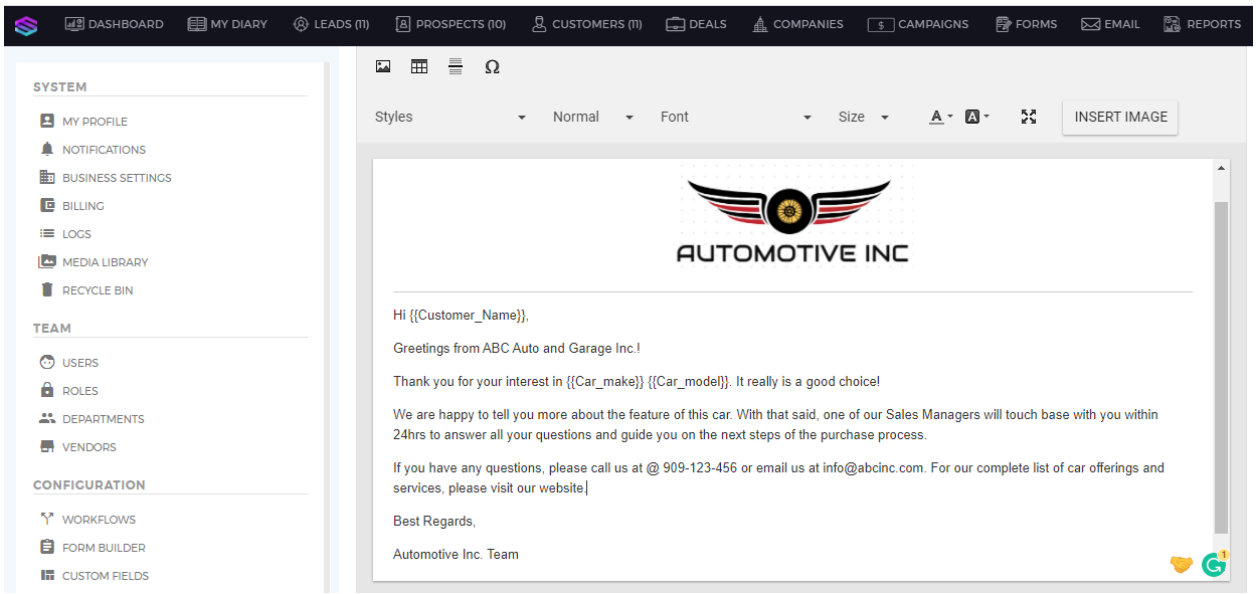
- Service Tech Manager to create a Deal as soon as the client confirmed booking.
- Service Maintenance pipeline will be used to manage and track Maintenance Services
- Only Service Tech Manager to work on this pipeline
- Hierarchy set up per Service Tech personnel for easier sales report monitoring

6. Custom Email Template Samples

- **Email marketing Sample:** Promo Email – 1st Email

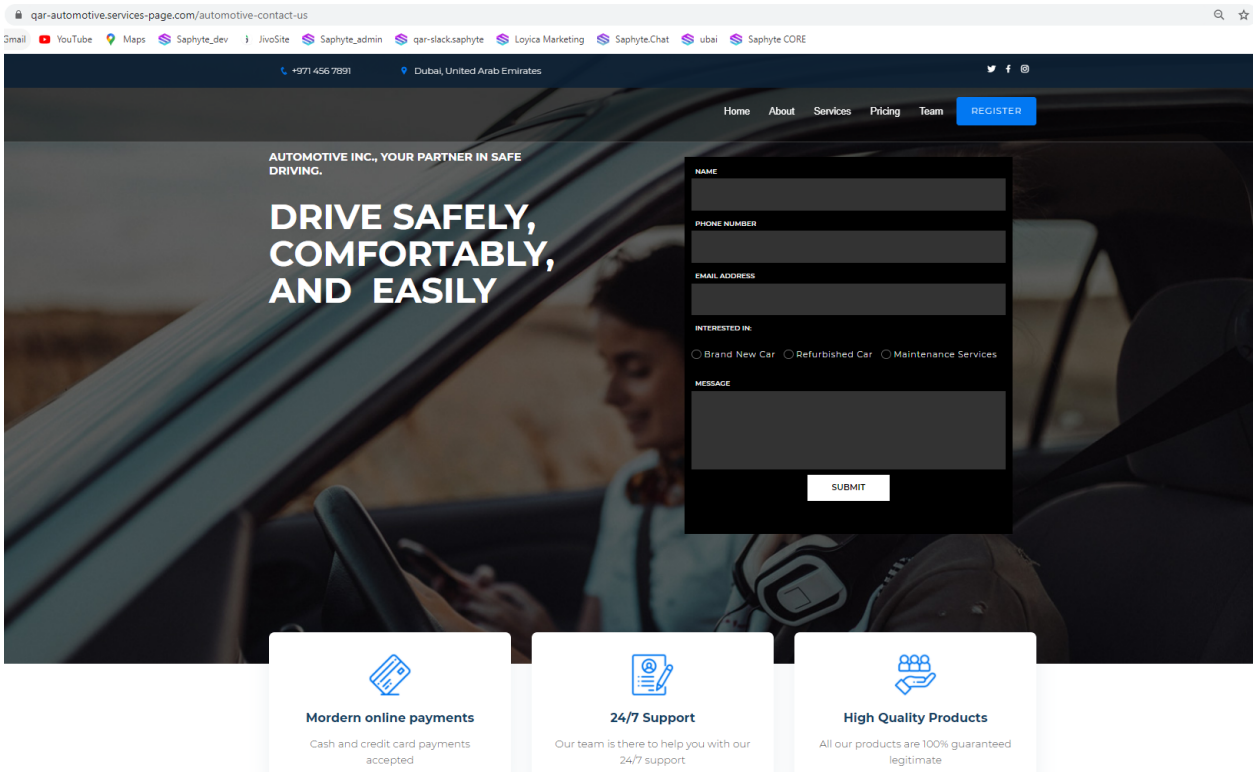


- **Auto Responder Email Sample:** New Car Purchase



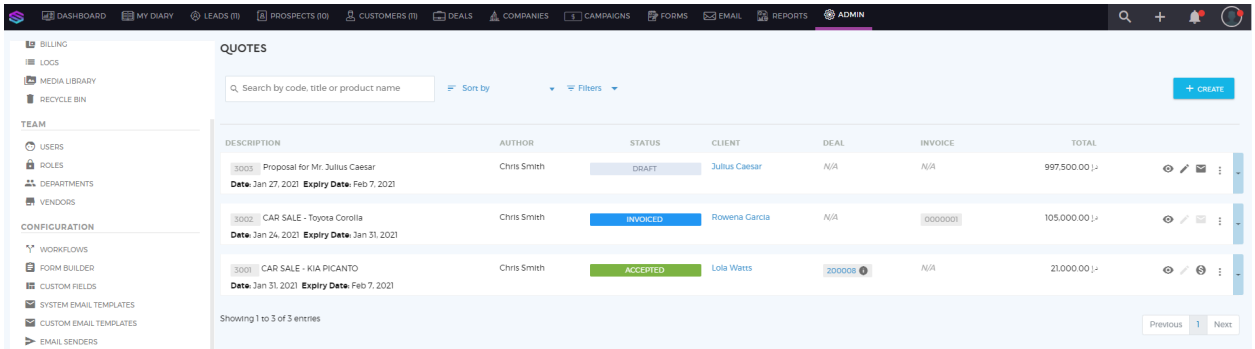
7. Landing Page

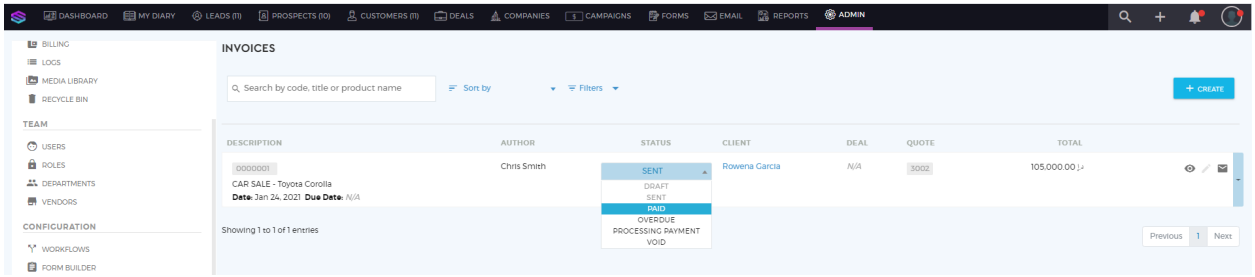
Link: http://qar-automotive.services-page.com/automotive-contact-us



8. Quotes

- As soon as the status is changed to “Accepted”, the “Invoice” button becomes available. Clicking the Invoice button will allow you to generate Invoice for the accepted quote.
- To see the quote details and notes associated with it, simply click on the arrow button beside the kebab button (3 vertical dots).



9. Invoice

- When creating an invoice, you can define the format of your invoice by clicking on the gear icon beside the Invoice Number field.