

Please be informed that we have converted the loyica.saphyte.cloud into a **B2B Tech Demo Build**.

Company Profile:

- B2B Solutions is a tech company that sells digital solutions mainly in the scope of Marketing.
- B2B Solutions cater to B2B

Here are the guidelines in using the build for the demo:

1. DEMO EMAIL ACCOUNT

All the automation emails will be sent to **demo@saphyte.com**

Demo:

Username: demo@saphyte.com

Password: Saphyte@2021

2. DEMO CREDENTIALS

Log in on the demo account using the below credentials:

URL: <https://qar-b2btech.saphyte.cloud>

Username: demo@saphyte.com

Password: Saphyte2021

3. AUTOMATED ELIGIBILITY CRITERIA SCORING

You can see the eligibility scoring in the leads, prospects, customers sections.

GREEN = ELIGIBLE (Score is ≥ 50)

ORANGE = INELIGIBLE (Score is < 50)

Pitch: Ditch the pen and paper and manual work. We can automate this process by answering the eligibility criteria questions right in Saphyte through the use of custom fields and let Saphyte calculate the scores and define the criteria. We can customize the score sets and add up to 10 different scoring categories.

Demo:

a. Fill in the above-mentioned custom fields with validation

The following fields correspond to scoring:

- **Seniority**
- **Company Size**
- **Geographical Location**
- **Sector**

#	RULE NUMBER	ENTITY	SUM TYPE	POINTS	FIELD	OPERATOR	VALUE	ACTIVE	ACTIONS
1	1026	Lead, Prospect, Customer	ADD	10	Sector	equals	Non-Profit Organization	✓	✎
2	1025	Lead, Prospect, Customer	ADD	30	Sector	equals	Public	✓	✎
3	1024	Lead, Prospect, Customer	ADD	20	Sector	equals	Private	✓	✎
4	1023	Lead, Prospect, Customer	ADD	15	Seniority	equals	Middle Management	✓	✎
5	1022	Lead, Prospect, Customer	ADD	20	Seniority	equals	Senior Management	✓	✎
6	1021	Lead, Prospect, Customer	ADD	25	Seniority	equals	Executive Management	✓	✎
7	1020	Lead, Prospect	ADD	25	Company Size	equals	101+ Employees	✓	✎
8	1019	Lead, Prospect	ADD	20	Company Size	equals	51-100 Employees	✓	✎
9	1018	Lead, Prospect	ADD	15	Company Size	equals	21-50 Employees	✓	✎
10	1017	Lead, Prospect	ADD	10	Company Size	equals	6-20 Employees	✓	✎
11	1015	Lead, Prospect	ADD	5	Company Size	equals	1-5 Employees	✓	✎

b. Navigate to the Scoring logs to track the point system

The screenshot displays a CRM interface with three main sections:

- LEADS LIST (11):** A list of leads with their names, email addresses, and scores. Erika Hope Buergo has a score of 25, while others have scores of -5 or 25.
- Lead Profile (Erika Hope Buergo):** A detailed view of a lead, including contact information (email, phone), general information (status, source), and various tabs for GENERAL INFORMATION, EMAILS, PHONES, LANGUAGES, OCCUPATION, COMPANIES, ADDRESS INFORMATION, ASSIGNATION, VENDORS, and MANAGERS.
- Scoring Log:** A section titled 'SCORING (9)' showing a list of scoring events. Each event includes the number of points added or reversed, the condition that triggered the change, and the date and time. For example, '25 points added for fulfilling the condition: Company Size equals 101+ Employees. On Tue Jan 19 2021 18:06:04'.

4. AUTO-ASSIGN MANAGER WHEN A LEAD IS CREATED

Pitch: This is one important point to pitch when it comes to *efficiency*. Most of the clients we encounter assign the leads to their team manually. We have created a workflow wherein whenever a lead is created, it will be assigned to Managers.

Demo:

a. Work only on leads section for this demo

b. Create a LEAD and fill out the:

- Name
- Email - make sure to use yopmail.com as the domain. For example name@yopmail.com - this is to execute the workflow for the onboarding
- Phone - random numbers will do

c. Show the activity feed that there is a log of all the updates/changes triggered in the system

d. Show that an automated reminder to call the client appears under the appointment section

5. AUTOMATED ONBOARDING EMAIL / AUTO-ASSIGN TO CASE MANAGER

Pitch: We can automate onboarding emails/confirmation based on certain triggers in the system such as whenever a custom field has been updated, or when a client has been converted into a customer.

Demo: B2B Tech Solutions Onboarding

<https://qar-b2btech.saphyte.cloud/admin/workflows/60043d05abaf146b621a76b2>

Workflow Name: B2B Tech Solutions Onboarding

- This workflow only works when a lead or prospect is converted into a customer
- Convert a lead/prospect into a customer
- Receive the onboarding email in the Saphyte Demo email account (to demonstrate that there is an automated email going out) or you can also check the workflow logs and check the email from there
- Demonstrate that outgoing emails sent from Saphyte are recorded in the lead's profile. **Emails tab > Emails Sent**
- Whenever a prospect is converted into a customer, it will automatically be assigned to a Case Manager.

The screenshot displays the Saphyte workflow management interface. At the top, there is an 'ASSIGNATION' section with two columns: 'VENDORS' (No added yet) and 'DEPARTMENTS' (No added yet). To the right, the 'MANAGERS' section lists 'Ibta Arabia'. Below this is a 'HISTORY' section showing a 'Lead' activity from 'Mon Jan 18 2021 17:46:36' (10 mins ago). The 'ACTIVITY FEED' section includes filters for 'Date', 'User...', and 'Activity type...'. The main content area shows two activity entries under the heading 'TODAY':

- Activity 1:** 'Workflow: Manager Assignment Website Form updated the Lead Erika Hope Buergo with the following changes:' (Mon Jan 18 2021 17:54:30). The changes listed are:
 - FIRST NAME:** sfsfs → Erika Hope
 - LAST NAME:** sfsfs → Buergo
 - EMAILS:** N/A → erikahope.dpbuergo@gmail.com
 - PHONES:** 42018645 → 0564204926
- Activity 2:** 'Workflow: Manager Assignment Website Form assigned managers to the Lead Erika Hope Buergo' (Mon Jan 18 2021 17:54:30). The new managers listed are 'Ibta Arabia'.

6. WEB FORMS - INQUIRY FORM

WorkflowName: B2B Tech Solutions Onboarding Manager Assignment Website Form

<https://qar-b2btech.saphyte.cloud/admin/workflows/60058eea0ea5073a19440e34>

Form Name: B2B Solutions Get In Touch With Us

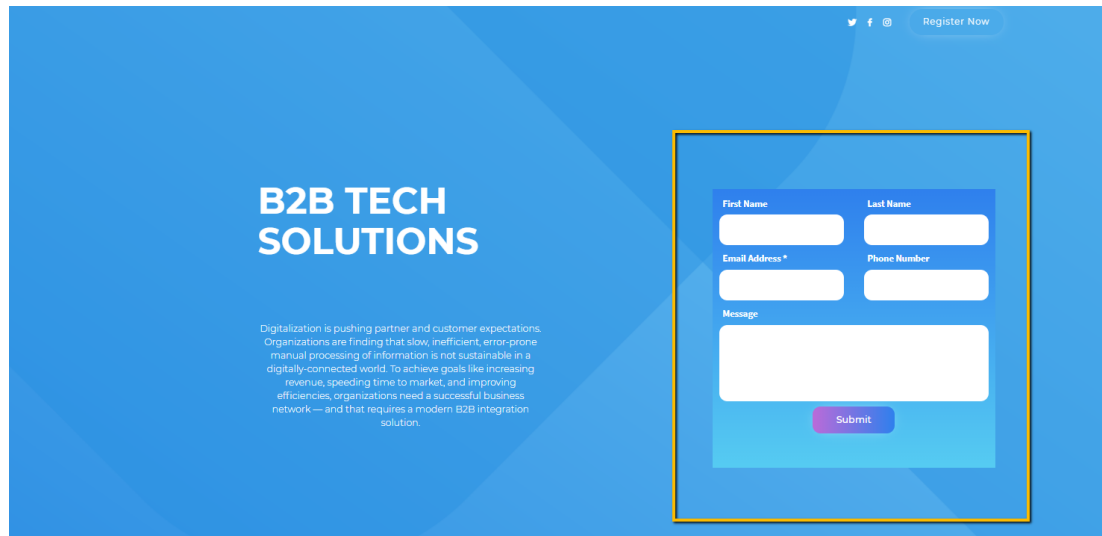
<https://qar-b2btech.saphyte.cloud/admin/form-builder/5f4f809933704a1740428372/preview>

Pitch: We can automate responses to the inquiries done via web forms and we can capture and store the information in Saphyte and categorize them accordingly - all done through automation

Demo:

a. Launch <http://qar-b2btech.hosted-page.com/b2b-tech-solutions>

b. Fill out the Inquiry Form



The image shows a web page for 'B2B TECH SOLUTIONS' with a contact form. The page has a blue background with white text. The form is highlighted with a yellow border and contains the following fields: First Name, Last Name, Email Address*, Phone Number, and a Message text area. A 'Submit' button is located below the message field. In the top right corner, there are social media icons for Twitter, Facebook, and Instagram, along with a 'Register Now' button. Below the main heading, there is a paragraph of text: 'Digitalization is pushing partner and customer expectations. Organizations are finding that slow, inefficient, error-prone manual processing of information is not sustainable in a digitally-connected world. To achieve goals like increasing revenue, speeding time to market, and improving efficiencies, organizations need a successful business network — and that requires a modern B2B integration solution.'

c. The information is automatically captured under 'Leads'

7. CUSTOMER SATISFACTION SURVEY

Pitch: Build a strong customer feedback loop and keep yourself updated with the rapidly-changing trends that may affect your customers' purchasing decisions

Workflow Name: Customer Satisfaction Survey

<https://qar-b2btech.saphyte.cloud/admin/workflows/600684d9ac658b268d2a3bd2>

Form Name: B2B Solutions - Customer Satisfaction Survey

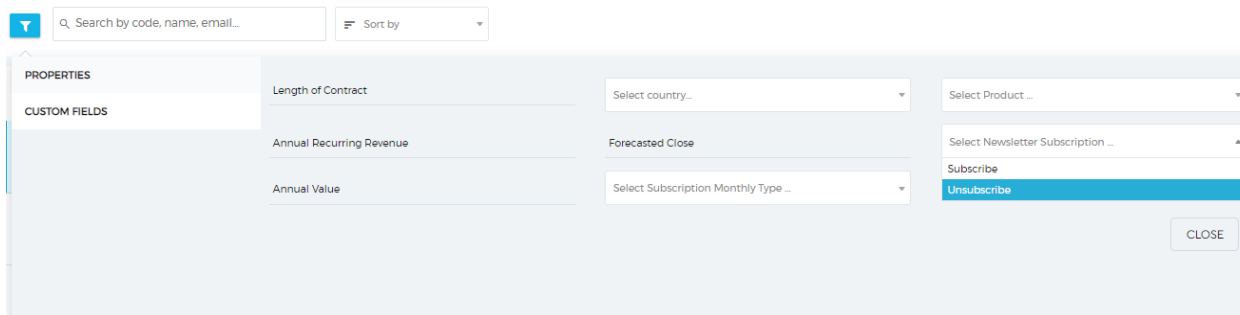
<https://qar-b2btech.hosted-form.com/h/fgA90ENba>

We can schedule the customer satisfaction survey or send it using a trigger. For demo purposes, we use a trigger.

- a. When "Lead" is converted to "Customer".
- b. Scheduled 24 hours Survey form will be sent to the customer.
- c. Check the demo email for the automated survey response

8. NEWSLETTER UNSUBSCRIPTION

Pitch: You can provide your customers with the preference to opt-in or out of your email services through Saphyte's GDPR Compliance capabilities. You can filter which clients have unsubscribed to your newsletter and skip to send them any emails.



The screenshot shows a CRM interface with a search bar at the top left containing the text "Search by code, name, email...". To the right of the search bar is a "Sort by" dropdown menu. Below the search bar, there are two sections: "PROPERTIES" and "CUSTOM FIELDS". The "PROPERTIES" section includes "Length of Contract", "Annual Recurring Revenue", and "Annual Value". The "CUSTOM FIELDS" section includes "Select country...", "Forecasted Close", and "Select Subscription Monthly Type...". On the right side of the interface, there are two dropdown menus: "Select Product ..." and "Select Newsletter Subscription ...". The "Select Newsletter Subscription ..." dropdown menu is open, showing two options: "Subscribe" and "Unsubscribe". The "Unsubscribe" option is highlighted in blue. A "CLOSE" button is located at the bottom right of the interface.

1. Go to this lead profile: <https://qar-b2btech.saphyte.cloud/crm/leads?id=5ffed3a8d63f8463211ab2d6>
2. Go to the emails tab and click the emails sent tab
3. Check one of the emails and check the footer for the unsubscribe link (preview pane)
3. Click on the link to redirect to the unsubscribe page

▶ EMAILS SENT EMAILS RECEIVED

SUBJECT: WELCOME TO B2B SOLUTIONS
From: notificationb2btech@yopmail.com

notification@b2btech.com
Source: Direct contact - Amelie Wahl



Welcome to B2B Solutions!

B2B Solutions is a well-known company specializing in business technology solutions.

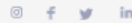
B2B Solutions is dedicated to helping businesses flourish by providing them end-to-end solutions that cover their creative, marketing, strategic, and development needs.

To learn more about B2B Solutions you can visit our website at www.b2bsolutions.com

You received this email because you have signed up at our website. To send us any feedback or reports, please email us at info@b2bsolutions.com.

Best Regards,
B2B Solutions Team

DISCOVER MORE



If you do not wish to receive emails like this, you may [unsubscribe here](#)

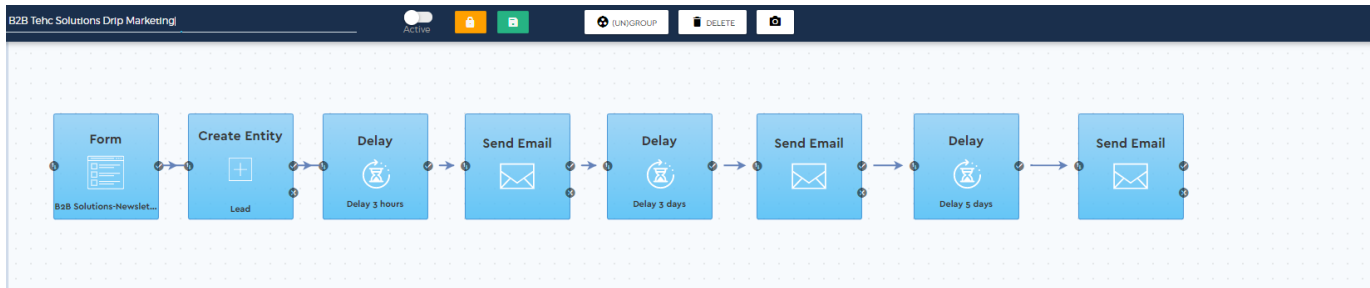
9. MARKETING EMAILS

Pitch:

- We can send an unlimited number of emails from Saphyte.
- We can schedule emails and delay them according to the schedule preferences of the sender

Demo: Show that we are capable of doing drip marketing

Workflow Name: B2B Solutions Drip Marketing <https://qar-b2btech.saphyte.cloud/admin/workflows/6004482e4f081c466d7a7453>



10. QUOTES




Demo:

- We can add multiple items and attach up to 3 files (document, image) per item as a further proof of the quotation
- They can also select the design of their quotes. Currently, we have a limited number of predefined themes in the system but sooner, we will have more.
- Once the quote is sent, it cannot be amended
- The quotes cannot be deleted due to auditing purposes
- The quote 'From' section pulls up information from the 'Business Settings' so you do not have to always manually add the details of your company

1. Go to the lead profile: <https://qar-b2btech.saphyte.cloud/crm/leads?id=5ffed3a8d63f8463211ab2d6>
2. Go to the quotes tab
3. Click the view icon

SUBMISSIONS (3) NOTES (1) APPOINTMENTS (1) EMAILS (4) (0) DOCS (0) DUPLICATES QUOTES (1)

Q Search by code, title or product name Sort by Filters + CREATE

DESCRIPTION	AUTHOR	STATUS	DEAL	INVOICE	TOTAL	
3009 Digital Media Marketing	Amelia Walsh	SENT	N/A	N/A	5,200.00	  

Date: Jan 25, 2021 Expiry Date: Feb 27, 2021


Showing 1 to 1 of 1 entries Previous 1 Next

11. CATEGORIZATION

Pitch:

- Saphyte has a feature where you can set a categorization for your clients based on the business process.
- This feature helps both in reporting and easy grouping of your clients.
- Categories can be renamed for easier internal jargons.

ALL LEADS (11) DIGITAL MEDIA MARKETING (2) SOCIAL MEDIA CAMPAIGNS (1) WEB & NATIVE APP DEVELOPMENT (3) E-COMMERCE PLATFORMS (3) WEBSITE & APP AUDITING (2)

 Q Search by code, name, email... Sort by