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)

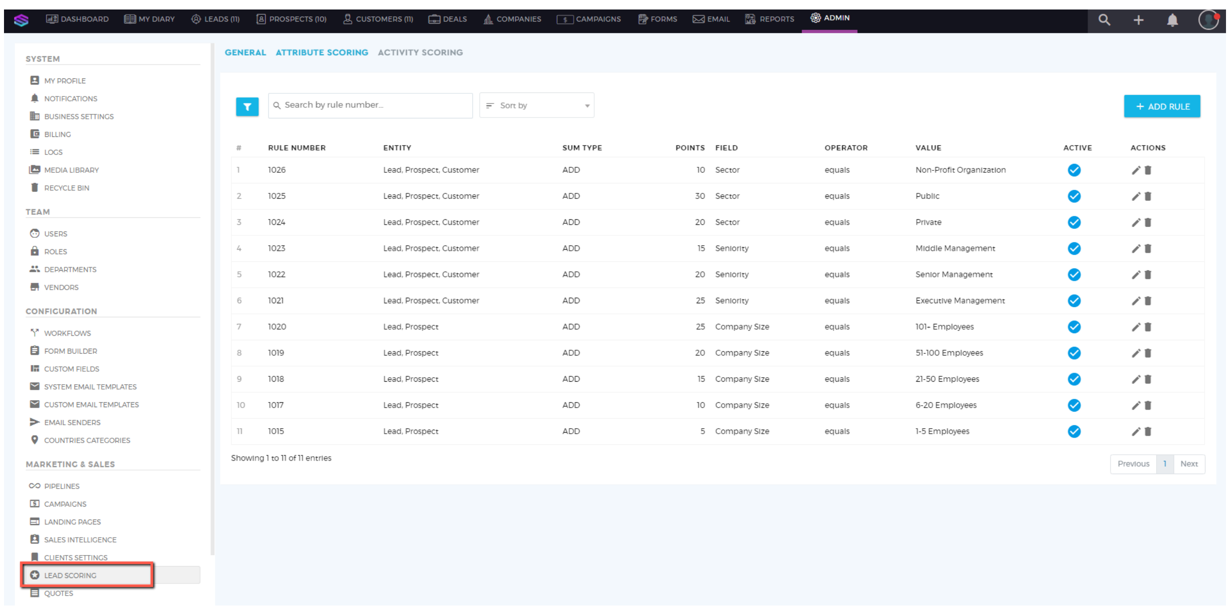
Pitch: Ditch the pen and paper and manual work. We can automate this process by answering the eligibility criteria questions right in Saphyte through the use of custom fields and let Saphyte calculate the scores and define the criteria. We can customize the score sets and add up to 10 different scoring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

Demo:

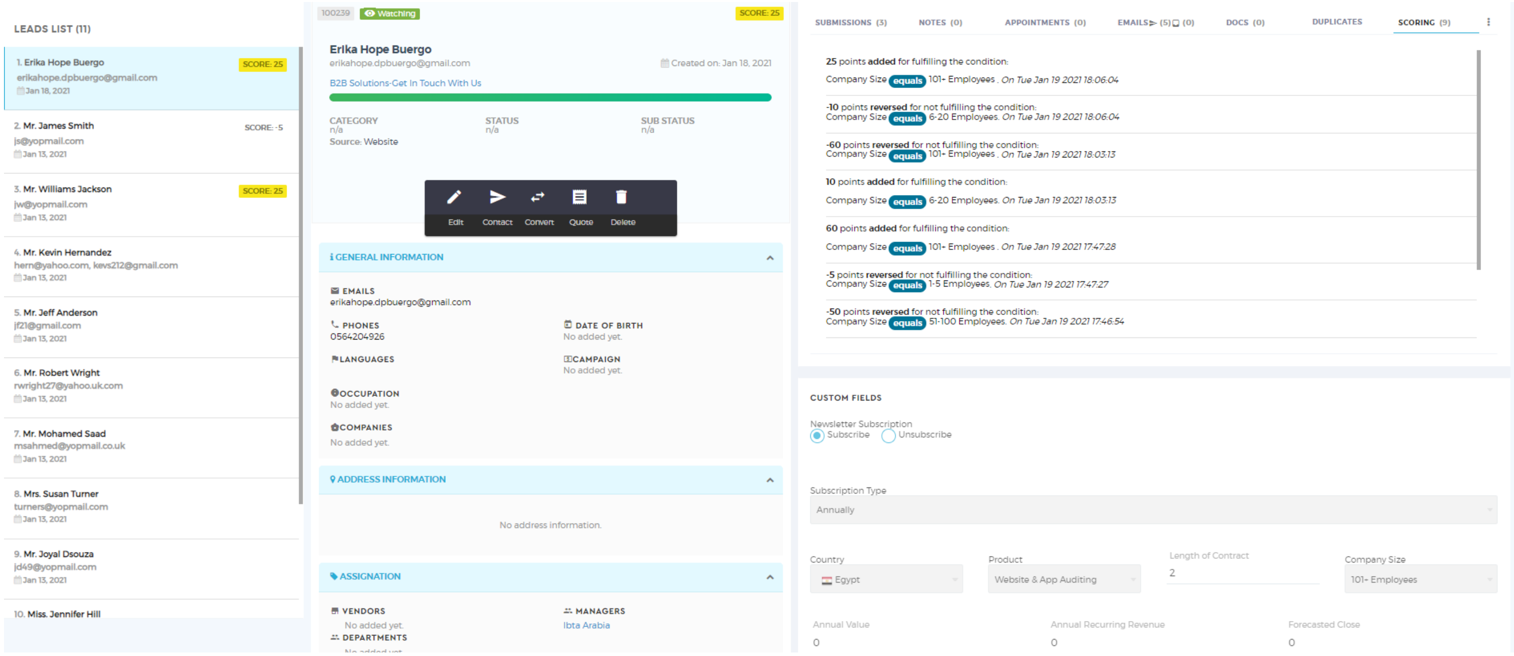
a. Fill in the above-mentioned custom fields with validation

The following fields correspond to scoring:

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



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



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

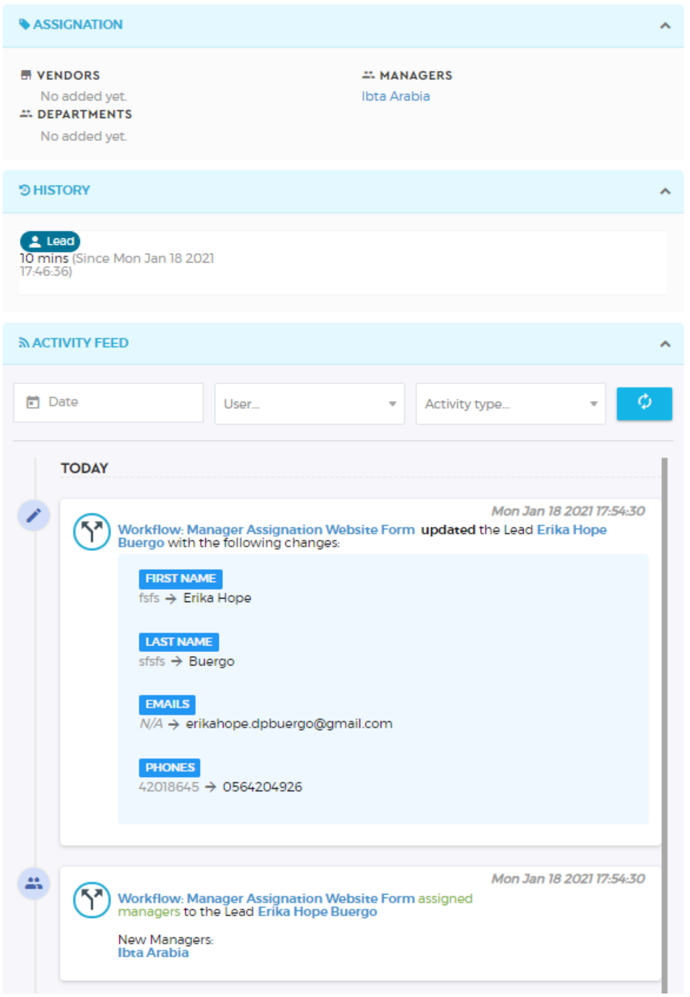
5. AUTOMATED ONBOARDING EMAIL / AUTO-ASSIGN TO CASE MANAGER

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

a. This workflow only works when a lead or prospect is converted into a customer
b. Convert a lead/prospect into a customer
c. 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

d. Demonstrate that outgoing emails sent from Saphyte are recorded in the lead's profile. **Emails tab > Emails Sent**
e. Whenever a prospect is converted into a customer, it will automatically be assigned to a Case Manager.



6. WEB FORMS - INQUIRY FORM

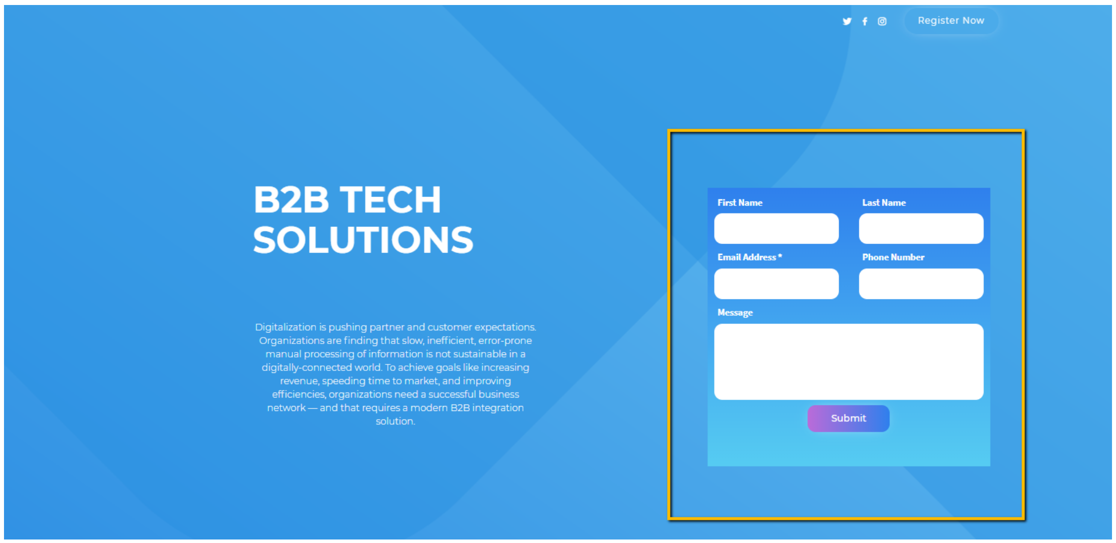
WorkflowName: B2B Tech Solutions Onboarding Manager Assignation Website Form
https://qar-b2btech.saphyte.cloud/admin/workflows/60058eea0ea5073a19440e34

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



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

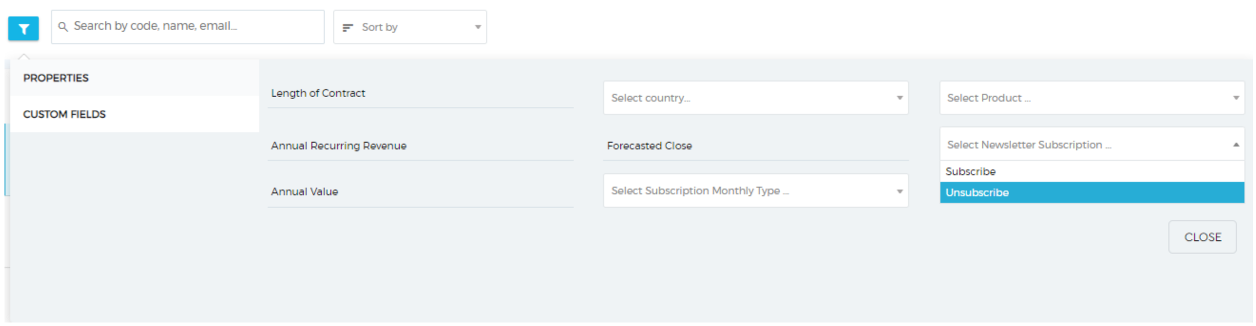
Workflow Name: Customer Satisfaction Survey
https://qar-b2btech.saphyte.cloud/admin/workflows/600684d9ac658b268d2a3bd2
Form Name: B2B Solutions - Customer Satisfaction Survey
https://qar-b2btech.hosted-form.com/h/fgA90ENba

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.



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

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

EMAILS SENT | EMAILS RECEIVED

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

notification@b2btech.com
Source: Direct contact - Amelia Walsh

B2B SOLUTIONS

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.

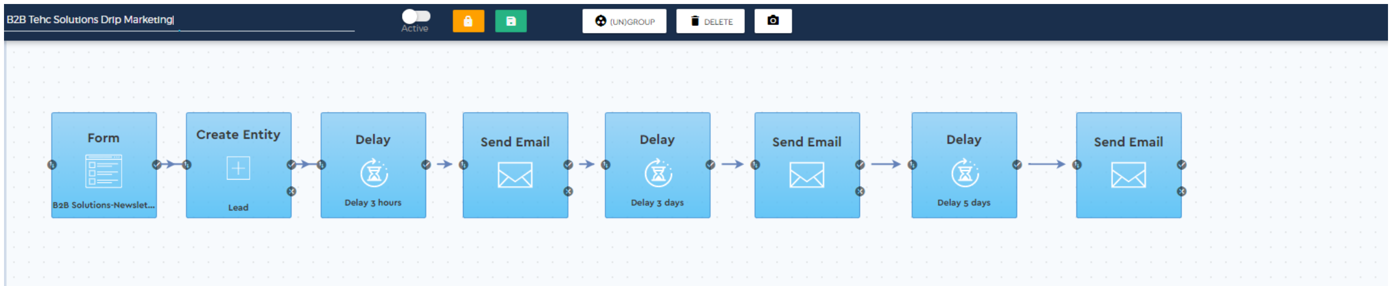
9. MARKETING EMAILS

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

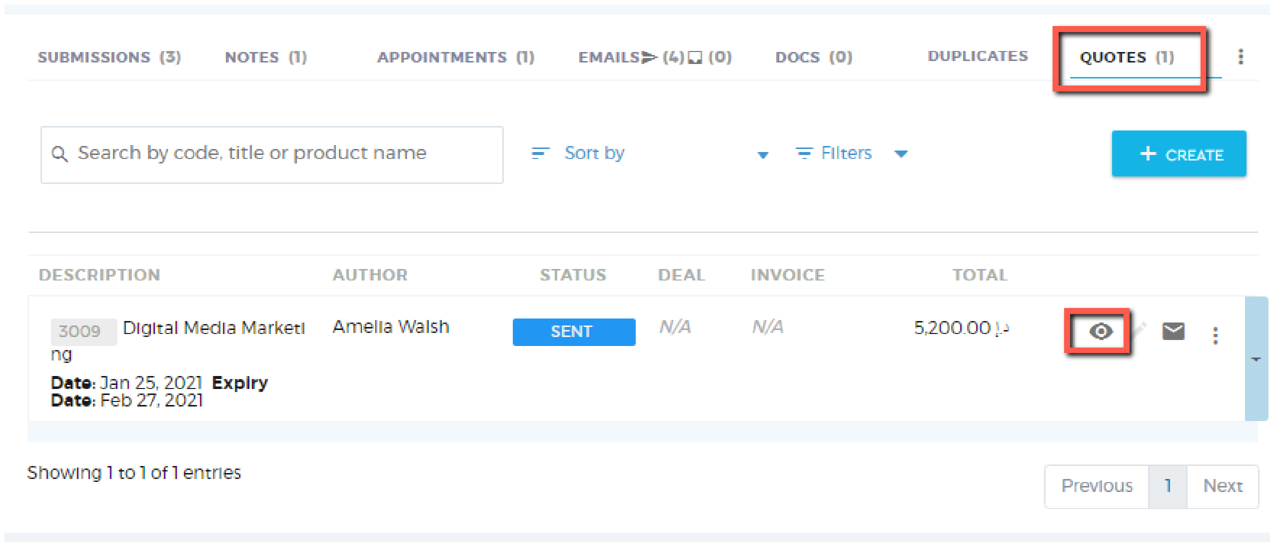


10. QUOTES

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



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.