

Please be informed that we have converted the [loyica-marketing.saphyte.cloud](https://loyica-marketing.saphyte.cloud) into an **Immigration Consultancy Demo Build**.

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](mailto:demo@saphyte.com)

**Password:** Saphyte@2021

## 2. DEMO CREDENTIALS

Log in on the demo account using the below credentials:

**URL:** <https://qar-consultancy.saphyte.cloud>

**Username:** heike.steiner@luftwaffe.com

**Password:** Password12345

### 3. AUTOMATED ELIGIBILITY CRITERIA SCORING

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

YELLOW = INELIGIBLE (Score is <67)

GREEN = ELIGIBLE (Score is >=67)

Usually, immigration consultancy services have a form where they answer the eligibility criteria of their leads.

**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:

- Arranged Employment
- Age
- First Official Language
- Work Experience
- Educational Attainment

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

100835 [Watch](#) ELIGIBLE: 79

**James Smith**  
jamesmith@smithson.co Created on: Dec 5, 2020

CATEGORY: **United Kingdom**      STATUS: **Visit Visa**      SUB STATUS: n/a

Edit Contact Convert Quote Invoice Delete

**GENERAL INFORMATION**

**EMAILS**  
jamesmith@smithson.co

**PHONES**  
3436814684

**DATE OF BIRTH**  
No added yet.

SUBMISSIONS (0)    NOTES (0)    APPOINTMENTS (1)    EMAILS (8) (0)    DOCS (1)    DUPLICATES    SCORING (9)

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**10 points added** for fulfilling the condition:  
Arranged Employment **equals** LMI from ESDC. *On Sun Jan 17 2021 14:31:55*

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**-13 points reversed** for not fulfilling the condition:  
Work Experience **equals** 4-5 years of recent skilled work experience. *On Sun Jan 17 2021 14:20:02*

---

**15 points added** for fulfilling the condition:  
Work Experience **equals** 6 years of recent skilled work experience. *On Sun Jan 17 2021 14:20:02*

---

**12 points added** for fulfilling the condition:  
Age **equals** 18-35 years of age at the time of application. *On Sun Jan 17 2021 14:18:45*

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**13 points added** for fulfilling the condition:  
Work Experience **equals** 4-5 years of recent skilled work experience. *On Sun Jan 17 2021 14:18:31*

---

**22 points added** for fulfilling the condition:  
Educational Attainment **equals** University. *On Sun Jan 17 2021 14:17:47*

---

**20 points added** for fulfilling the condition:

## 4. CATEGORIZATION

The categorization is based on visa services per country. Please note that Category (Country) and Status (Services) only have validations. There is no Sub-status.

**Pitch:** Saphyte adapts to your business processes by providing you with the ability to set custom categories, statuses, and sub-statuses (for example New, Contacted, Working, Waiting for Response, Not Interested, etc.) for easier categorization of your clients. This can also be useful for email marketing when you can easily filter your target recipients on a granular level using categories.

**Demo:** You have to choose the category first before the status will appear.

100859 Watching INELIGIBLE: 12

**Julia Knowles**  
julia@knowlesmail.com Created on: Jan 17, 2021

Consultancy : Contact Us Form

United Kingdom x Visit Visa x Select Sub Status

Source: Company Website

Categories appear on the header. Refresh the page to update the count of categories.

ALL LEADS (126) UNITED KINGDOM (8) UNITED STATES (9) AUSTRALIA (8) NEW ZEALAND (11) CANADA (7) CYPRUS (4) SPAIN (9) POLAND (10)

## 5. 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](mailto:name@yopmail.com) - this is to execute the workflow for the onboarding
  - Phone - random numbers will do
  - Country of Immigration - This is a required custom field. Fill in the COUNTRY OF IMMIGRATION field as this is the trigger for the workflow.
- 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

ASSIGNATION

VENDORS

No added yet.

MANAGERS

Joseph Jackson

DEPARTMENTS

No added yet.

HISTORY

Lead

3 s (Since Sun Jan 17 2021 20:23:00)

ACTIVITY FEED

Date User... Activity type...

TODAY

- Sun Jan 17 2021 20:23:01*

Workflow: Consultancy : Auto-Manager Assignment--1 added a Call on Lead Julio Cesar

SUBJECT	DATE	TIME
Follow up with Client	Jan 17, 2021	17:23
- Sun Jan 17 2021 20:23:00*

Workflow: Consultancy : Auto-Manager Assignment--1 updated the Lead Julio Cesar with the following changes:

  - CF GENDER**  
N/A → Male
  - CF NATIONALITY**  
N/A → Spain
  - CF COUNTRY OF IMMIGRATION**  
N/A → Cyprus
- Sun Jan 17 2021 20:23:00*

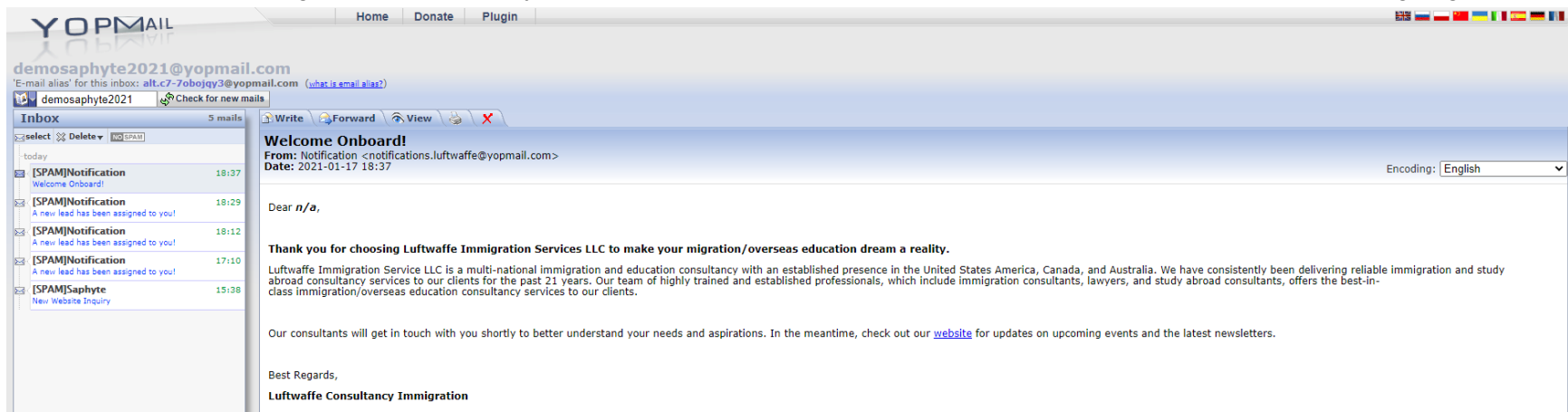
Workflow: Consultancy : Auto-Manager Assignment--1 assigned managers to the Lead Julio Cesar

New Managers:  
Joseph Jackson

## 6. 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.

- 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)



- 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.

100862 Watching INELICIBLE 12

**Jennifer langtorn**  
jen@yopmail.com Created on: Jan 17, 2021

CATEGORY	STATUS	SUB STATUS
n/a	n/a	n/a

Lead Source  
Select Lead Source ...

Edit Contact Convert Quote Invoice Delete

**GENERAL INFORMATION**

**EMAILS**  
jen@yopmail.com

**PHONES**  
05165413546

**LANGUAGES**

**DATE OF BIRTH**  
01/17/2021

**CAMPAIGN**  
No added yet.

**OCCUPATION**

SUBMISSIONS (0) NOTES (0) APPOINTMENTS (1) **EMAILS (1) (0)** DOCS (0) DUPLICATES QUOTES (0)

**EMAILS SENT**  EMAILS RECEIVED

SUBJECT: WELCOME ONBOARD TO LUFTWAFFE IMMIGRATION! Notification Sun Jan 17 2021 18:40:13  
From: notifications.luftwaffe@yopmail.com Source: Workflow \*

Dear Jennifer,

**Thank you for choosing Luftwaffe Immigration Services LLC to make your migration/overseas education dream a reality.**

Luftwaffe Immigration Service LLC is a multi-national immigration and education consultancy with an established presence in the United States America, Canada, and Australia. We have consistently been delivering reliable immigration and study abroad consultancy services to our clients for the past 21 years. Our team of highly trained and established professionals, which include immigration consultants, lawyers, and study abroad consultants, offers the best-in-class immigration/overseas education consultancy services to our clients.

Our consultants will get in touch with you shortly to better understand your needs and aspirations. In the meantime, check out our [website](#) for updates on upcoming events and the latest newsletters.

Best Regards,

**Luftwaffe Consultancy Immigration**



## 7. WEB FORMS - INQUIRY FORM

**Workflow Name: Consultancy: Contact Us :** <https://qar-consultancy.saphyte.cloud/admin/workflows/60041edb9ddd4415405db9f4>

**Form Name: Consultancy: Contact Us :** <https://qar-consultancy.saphyte.cloud/admin/form-builder/60166ddf94c16b65c7780abb/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-consultancy.hosted-page.com/consultancy-sign-up>
- b. Fill out the Inquiry Form

TAKE THE OPPORTUNITY TO TRAVEL

# LUFTWAFFE IMMIGRATION

Your trusted partner in immigration services.

Weather  
23 C Without Precipitation

FIRST NAME

LAST NAME

EMAIL ADDRESS

PHONE NUMBER

COUNTRY OF IMMIGRATION  
Select Country of Immigration...

MESSAGE

Submit

- c. Refresh the LEADS section to check the information captured

## 8. 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

**Demo:**

**Workflow Name: Consultancy: Scheduled Feedback Survey**

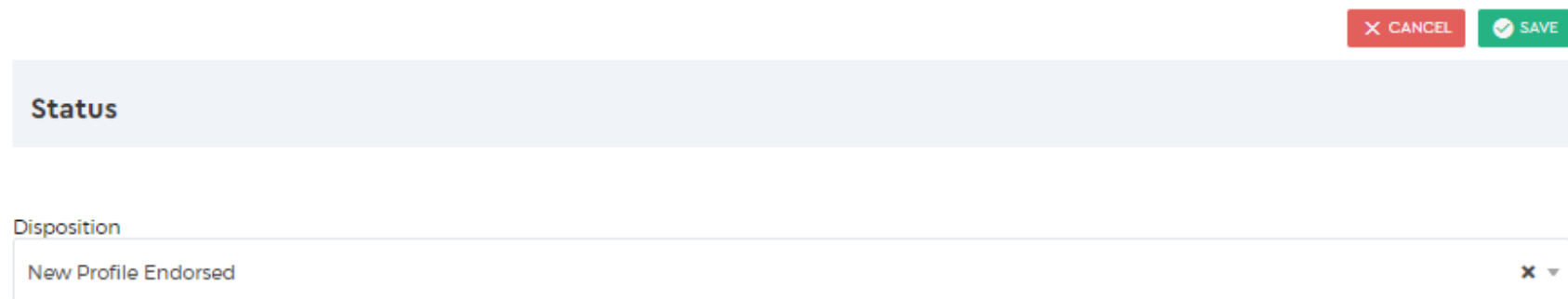
<https://loyica-marketing.saphyte.cloud/admin/workflows/6003f8b7ad999076b9199bf1>

**Form Name: Consultancy Feedback Form** <https://gar-consultancy.hosted-form.com/h/opXfJCLJY>

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

- a. Go to '**Customers**' tab
- b. Select a customer profile
- c. Under Status > Choose 'New Profile Endorsed'

CUSTOM FIELDS

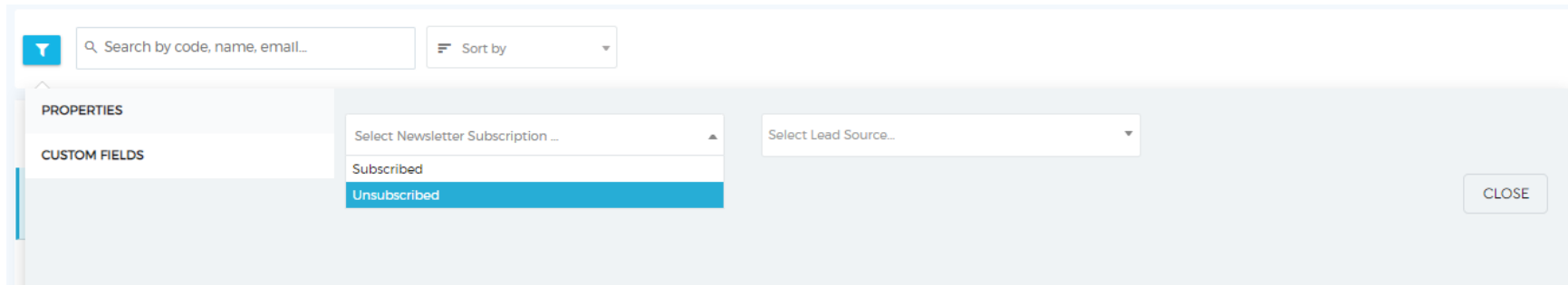


The screenshot shows a form configuration interface. At the top right, there are two buttons: a red 'CANCEL' button and a green 'SAVE' button. Below these is a large light blue rectangular area labeled 'Status'. Underneath the 'Status' area is a dropdown menu labeled 'Disposition' with the text 'New Profile Endorsed' and a small 'x' icon with a downward arrow on the right side.

- d. Check the demo email for the automated survey response

## 9. 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.



### Demo:

1. Go to custom email templates: Link: <https://qar-consultancy.saphyte.cloud/admin/mailbox/custom-templates/6003e97fc2ea667cef0691d3>
2. Check the footer for the unsubscribe link (preview pane)
3. Click on the link to redirect to the unsubscribe page

To test the email:

Lead > Contact > Send from template

ALL LEADS (127) UNITED KINGDOM (8) UNITED STATES (9) AUSTRALIA (10) NEW ZEALAND (10) CANADA (7) CYPRUS (4) SPAIN (9) POLAND (10)

### Send email to Lead : Julio Cesar

Send from Template

From (If not selected, default sender will be used)

Select sender...

Email subject:

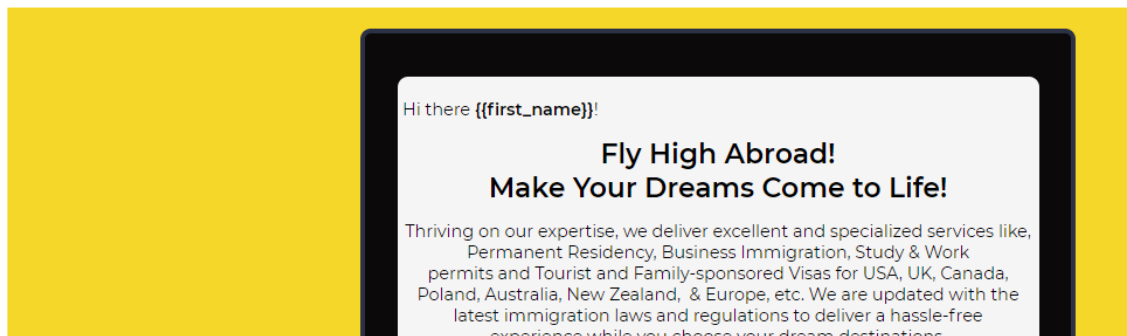
Write subject... \*

MARKETING EMAIL

#### PARAMS

First name \*

#### PREVIEW



## 10. 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:** Consultancy Drip Marketing <https://gar-consultancy.saphyte.cloud/admin/workflows/6004662f2086737dc359e8d4>

