

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:

1. Open gmail.com
2. Credentials:

Username: demo@saphyte.com

Password: Saphyte@2021

2. DEMO CREDENTIALS

Log in on the demo account using the below credentials:

URL: <https://qar-insurance.saphyte.cloud/admin>

Username: demo@saphyte.com

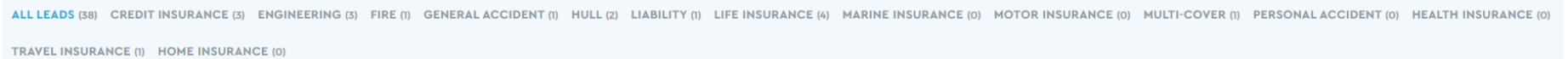
Password: Saphyte2021

3. CATEGORIZATION

The categorization is based on the insurance products. 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.



ALL LEADS (58) CREDIT INSURANCE (3) ENGINEERING (3) FIRE (1) GENERAL ACCIDENT (1) HULL (2) LIABILITY (1) LIFE INSURANCE (4) MARINE INSURANCE (0) MOTOR INSURANCE (0) MULTI-COVER (1) PERSONAL ACCIDENT (0) HEALTH INSURANCE (0)
TRAVEL INSURANCE (1) HOME INSURANCE (0)

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

Note: There are no categories in Companies Tab

4. CLIENT MANAGEMENT

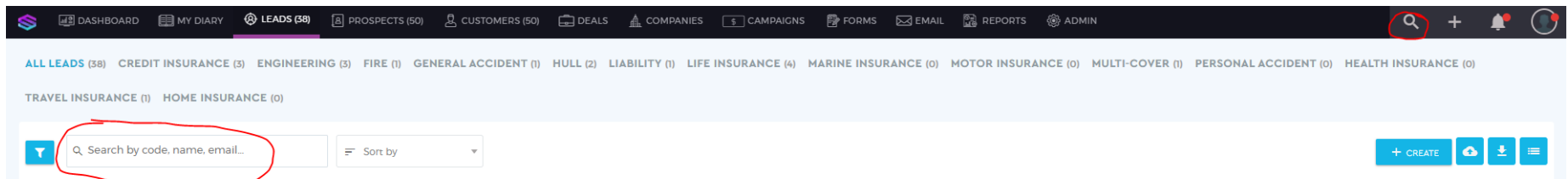
Pitch: Insurance companies cater to both B2C and B2B clients. Saphyte is capable of storing contacts for both customer segments.

Demo:

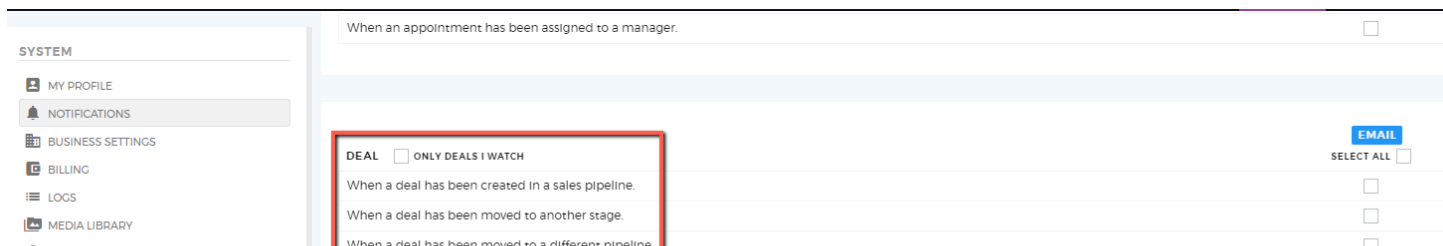
Leads/Prospects/Customers	B2C (Can be automated)
Companies	B2B (Can be automated)
Vendors	Brokers (Can be automated)
Deals	Deals Management (Cannot be automated)
Users	Team Management (Can be automated)

Client Objections:

1. **Duplicate Management** - We can only identify duplicates with an email address. The common question that will come from the client is *“I want to check if there is a duplicate in the name”*. The answer to that is that they can make use of the search bar available in the entities section or the shortcut button to find out if the same client already exists in the database.



2. **Notify when a deal has been updated** - We can have custom fields inside the deals however, we cannot automate them and set them as triggers. We can instead notify whenever a deal has been moved to another stage by turning the notifications on for the deals settings or by checking the updates in the deals activity feed (available in deals and in dashboard).



DEALS SAMPLE ☰

DETAILS CUSTOM FIELDS NOTES (0) APPOINTMENTS (0) DOCUMENTS (0) CAMPAIGNS (0) QUOTES (0) INVOICES (0) **ACTIVITY**

Date User... Activity type... ↻

TODAY

User: Jane Liam Smith updated the Deal Deals Sample (Pipeline Insurance Sales Pipeline) with the following changes: Mon Jan 25 2021 15:44:58

- CF RM ID**
N/A → 0545151515
- CF CSC ID**
N/A → 1005054
- CF CSC APPROVAL**
N/A → YES

5. GET A QUOTE

Pitch: Insurance companies usually receive leads from their website. We can automate capture of information from the website into Saphyte CRM through automation.

Demo:

Landing Page Link: <http://qar-insurance.hosted-page.com/get-in-touch>

Note: This is an important section to demonstrate to the clients.

- a. Fill out the 'Get A Quote' form
- 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
 - Insurance type - Select '**HEALTH**' insurance by default
- c. Refresh the leads page to view the new information captured
 - d. Show that leads are automatically assigned to manager
 - e. Show that an automated reminder to call the client appears under the appointment section

6. AUTOMATE UNDERWRITING REQUEST PROCESS

Pitch: It was clear that there are HUGE amounts of manual processes needed from when a customer enquires about the service to actually being insured. There are internal and external channels which are involved whether it's the broker (brings in the lead, underwriter, insurer). Speed is the key for insurers to get the quote out and close the deal.

Demo:

Note: This is an important section to demonstrate to the clients.

Landing Page Link: <http://qar-insurance.hosted-page.com/request-for-underwriting-portal>

a. This workflow only works when the Request for Underwriting is answered and is only working under **PROSPECTS** section

b. MUST fill out the following:

- Client Type - You can demo automated **B2B** (Prospects) or **B2C** capture (Companies)
- Insurance Type - You can only select **HEALTH/MOTOR/LIFE** for demo purposes
- Number of Members - This is the main trigger to inform the underwriter that there is a proposal. If it is **<250**, it goes straight to the underwriter; it is **>250** it goes to the CSC for approval
- Client Name

c. Receive the onboarding email in the Saphyte Demo email account (to demonstrate that there is an automated email going out) or go to **logs>workflow>view execution**

The screenshot displays the Saphyte system interface, specifically the 'WORKFLOWS' section. The left sidebar contains navigation options: SYSTEM (MY PROFILE, NOTIFICATIONS, BUSINESS SETTINGS, BILLING, LOGS, MEDIA LIBRARY, RECYCLE BIN), TEAM (USERS, ROLES, DEPARTMENTS, VENDORS), and CONFIGURATION (WORKFLOWS). The main content area shows a 'WORKFLOW EXECUTIONS LIST (9)' with three entries:

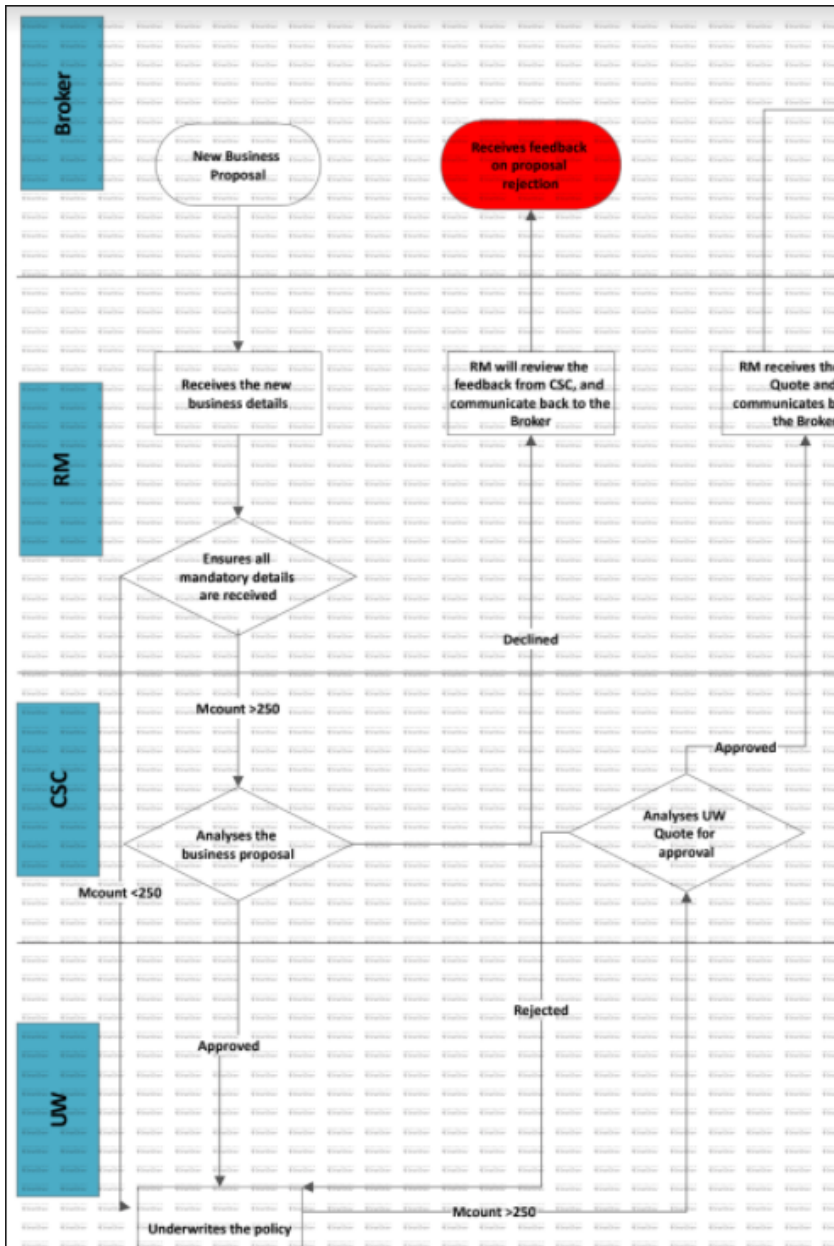
- 1. #10009: Capture Client Details for Underwriting Request - Latest Version (#8). Actions: Create Prospect: Jello Ace.
- 2. #10008: Capture Client Details for Underwriting Request - Latest Version (#8). Action: Fail at Create entity.
- 3. #10007: CSC Approval for Underwriting - Latest.

The first entry (#10009) is highlighted with a red box. To the right, a detailed view of this execution is shown, including:

- EXECUTION #**: 10009
- ACTIONS**: Form: CAPTURE PROSPECT FOR UNDERWRITING REQUEST Form Submission (42%), Create Prospect: Prospect: Jello Ace
- WORKFLOW**: Version: Latest Version (#8), Capture Client Details for Underwriting Request
- PARENT EXECUTION**: System
- DURATION**: Jan 26, 2021 00:02:48, 349.00 ms

Below this, a 'Triggered Executions' table is shown, which is currently empty with the message 'No triggered executions.' A 'View Execution' button is visible in the bottom right corner of the detailed view, also highlighted with a red box.

The automation process is followed after Sehteq's first few processes:



d. Manual Element that can be automated:

- CSC Approves Business Proposal, fill out the CSC Approval for Underwriting and also the CSC Approval Decline Reason
- Go to the logs>workflow> and click on the sent email so you don't have to go the Saphyte email every now and then

CSC

CSC Approval for Underwriting
 Yes No

CSC Approval Decline Reason

SYSTEM EMAILS **WORKFLOWS** LOGIN EVENTS LEAD SCORING

EXECUTION #	WORKFLOW	PARENT EXECUTION	DURATION
10007	CSC APPROVAL FOR UNDERWRITING	MANUAL ACTION	JAN 25, 2021 23:59:14


Email Content

Attention Alexia Cooper (acooper@insurance.com):

Your business proposal has been declined by the CSC team.

Please find the details below:

Client Name: Novella
Number of Members: >250
Insurance Type: n/a
Decline Reason: no attached documents
Client Link: <https://qar-insurance.saphyte.cloud/crm/prospects/600d8f457304f74afd7a9009>

Recipients **Written**
demo@saphyte.com 
Sent ✓

7. CUSTOMER SEGMENTATION

Pitch: Easily sort your data according to profiles with Saphyte's custom labels

Demo:

Leads/Prospects/Customers	Make use of the categories on the header and the filter section for custom fields
Companies	Categories are not yet available; make use of filter section for custom fields only

When asked if the categories label (CATEGORY, STATUS, and SUBSTATUS), the answer is **yes** we can modify the label name.

8. PIPELINES

Demo:

Pipelines are separated according to B2C and B2B. Sales Hierarchy comprises different insurance types.

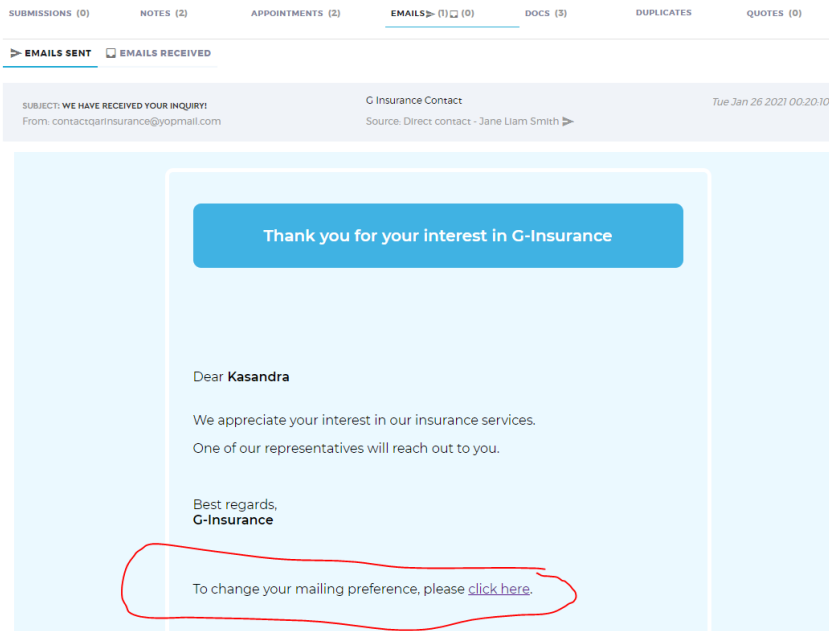
If the client wants to see the deals of one salesperson, you can filter the deals per owner.

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 lead link <https://qar-insurance.saphyte.cloud/crm/leads/600d8959b5e12d15125a7411>
2. Go to emails sent
3. Click on the unsubscribe link to redirect to the unsubscribe page

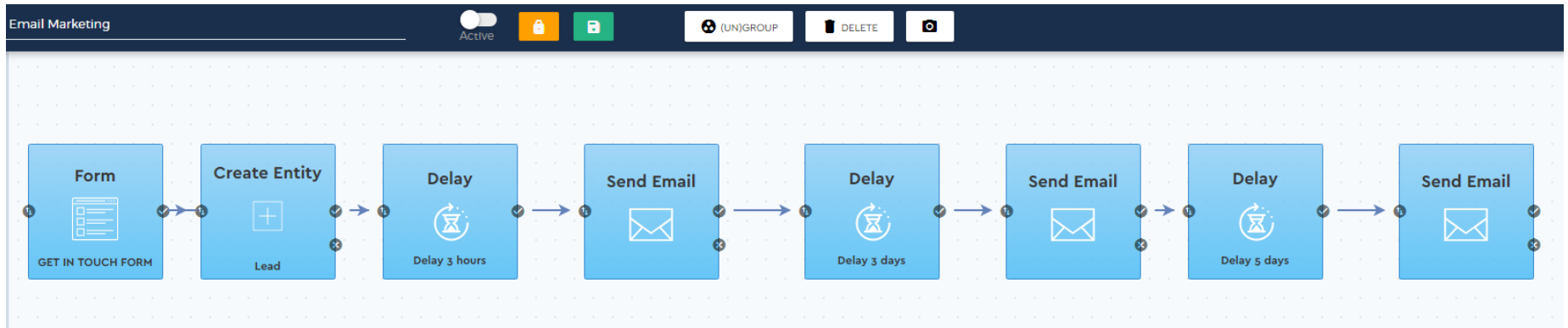


10. MARKETING EMAILS

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



11. QUOTES

Objections from client: Create quotations that can have comparisons from different insurance providers. Yes, we can do that!

Demo:

1. Add Quotes from Companies Tab
2. Add different quotes from multiple insurance providers and add the table of benefits by attaching a document to each item. You can add up to 3 documents to support the quotation.

FROM
Company Name *

G Insurance



Email * Phone *

info@g-insurance.com 65641687

Address

2001 Tower Sq, Dubai, Dubai, United Arab Emirates

PRODUCTS/SERVICES
Add Items to create a new quote.

<input type="checkbox"/>	CODE	NAME	QUANTITY	UNIT PRICE	TOTAL PRICE
1 <input type="checkbox"/>	NoorTakaful	Noor Takaful	1	15000	15,000.00 ,+
		Description Quote for Plan 1 and Plan 3			
2 <input type="checkbox"/>	OmanInsurance	Oman Insurance	1	20000	20,000.00 ,+

ADD PRODUCT

3. Clients can approve or reject the quote and add comments on the reason for the decision.

QUOTE

QUOTE NUMBER 3001

DRAFT

QUOTE DATE

Tue, January 26, 2021

EXPIRY DATE

Sun, January 31, 2021

FROM

G Insurance

2001 Tower Sq, Dubai, Dubai, United

Arab Emirates

65641687

info@g-insurance.com


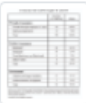
BILL TO

Jelly Ace Corpotation

253054638406

justinejace@yopmail.com

G Insurance

NO.	DESCRIPTION	QTY	UNIT PRICE (AED)	NET PRICE (AED)	LINE TOTAL (AED)
1	Noor Takaful <small>NoorTakaful</small> Quote for Plan 1 and Plan 3 	1	15,000.00	15,000.00	15,000.00
2	Oman Insurance <small>OmanInsurance</small> 	1	20,000.00	20,000.00	20,000.00
SUB - TOTAL NET				35,000.00	AED
Discount				0.00	AED
VAT 5%				1,750.00	AED
TOTAL				36,750.00	AED

Disclaimer

The total amount is not the total figure. Each item has different comparison and it is exclusive of 5% VAT.

Updated with Awnic Insurance Processes:

As requested, I have already implemented Awnic's processes in our demo build.

Few things to note:

1. The same process from the previous Awnic demo build (the one shown in the video) is replicated in our demo build (qar-insurance).
2. Only work on the **PROSPECTS TAB** when demonstrating this process
3. You only have to work on these two Custom Field sections:
 - Customer Profile
 - Referral Criteria

CUSTOM FIELDS

Customer Information

Customer Type Private Individual Busine... ▼	Disposition Approved by Supervisor ▼	Quotation Confirmed Yes ▼	Discount Eligibility Select Discount Eligibilit... ▼
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Referral Criteria

Eligible for Referral Criteria Select Eligible for Referral Criteria ... ▼

3. Selection that triggers an automated response:

Customer Type:

- Corporate Fleets
- Rent-A-Car Company
- High Value Vehicle Request (with UW exceptions)

Disposition (previously labeled Status on the AWNIC video demo):

- Quotes For Revision
- Approved by Supervisor

Quotation Confirmed:

- Yes

Eligible for Referral Criteria:

- Yes
- No