

Company Profile

Royal Creamery is a food and beverage manufacturer and distributor. Our mission is to produce excellent quality, nutritious food and produced that enriches our consumers' lives every day. We cater to dairy, poultry, pastry, infant nutrition, and refreshment products.

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**

Log in on the email account using the below credentials:

Username: **demo@saphyte.com**

Password: **Saphyte2021**

2. DEMO CREDENTIALS

Log in on the demo account using the below credentials:

Username: **demo@saphyte.com**

Password: **Saphyte2021**

3. BUSINESS SETTINGS

Pitch: Store your business information in one view. Go to your **'Business Settings'** tab. Fill out the information, upload your company, indicate your Tax Registration Number, and complete all your company details.

The screenshot displays the 'BUSINESS SETTINGS' page in a CRM system. The sidebar on the left has 'BUSINESS SETTINGS' highlighted with a red box. The main content area is titled 'BUSINESS SETTINGS' and is divided into several sections:

- GENERAL:** Includes a logo upload button, Workspace Name (qar-supplier), Company Name (Royal Creamery Inc.), Tax Registration Number (01808880228), Email (official@royalC.com), Timezone (UTC-04:00 Asia/Dubai), and Currency (AED).
- ADDRESS:** Includes a dropdown for Country (United Arab Emirates), and fields for Address Line 1, Address Line 2, Address Line 3, City, State/Region, Postcode, and Phone.
- SHARED FORMS DOMAIN:** A dropdown menu with 'Select domain...'.
- LANDING PAGES DOMAIN:** A dropdown menu with 'hosted-page.com'.

4. AUTOMATED ELIGIBILITY CRITERIA SCORING

Pitch: Determine the worthiness of your leads by assigning values based on multiple attributes including how they have engaged with your website and brand. 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:

1. Set up the right metrics to track which leads are highly qualified by setting up multiple scoring conditions. You can see the eligibility scoring in the leads, prospects, customers sections.
2. Create multiple point-based categories in qualifying your leads (e.g. hot, warm, cold) based on your client's history of interactions.

GREEN = HOT (Score is ≥ 67)

ORANGE = COLD (Score is < 67)

By definition:

COLD LEAD - is considered as the contacts in your list who have probably shown little interest in your product or are in close reach to you but are not yet in urgent need to close a sale.

HOT LEAD - is considered as a qualified lead who is highly interested in your product or service, and is ready for direct contact to close a sale.

The screenshot displays the Saphyte Admin interface for configuring lead scoring. The top navigation bar includes: DASHBOARD, MY DIARY, LEADS (8), PROSPECTS (50), CUSTOMERS (50), DEALS, COMPANIES, CAMPAIGNS, FORMS, EMAIL, REPORTS, and ADMIN. The left sidebar menu lists various system and marketing settings, with 'LEAD SCORING' highlighted in a red box. The main content area is titled 'GENERAL ATTRIBUTE SCORING ACTIVITY SCORING' and contains the following sections:

- LEAD SCORE CATEGORY:** A section for creating categories to group leads or clients based on a lead score. It includes three predefined categories: 'NOT INTERESTED' (score range -3 to -1), 'COLD' (score range 0 to 66), and 'HOT' (score range 67 to 100). Each category has a color-coded square and a range of input fields. Below these is an 'Add Category' button.
- CONFIGURATION:** A section for setting up lead scoring system behaviour. It contains three columns of settings, each with an 'Enable Score on' toggle and three radio button options for display: 'Display Score', 'Display Category Name', and 'Display Category Name and Score'.
 - Column 1: Enable Score on Lead Profile (checked). Options: Display Score (selected), Display Category Name, Display Category Name and Score.
 - Column 2: Enable Score on Prospect Profile (checked). Options: Display Score (selected), Display Category Name, Display Category Name and Score.
 - Column 3: Enable Score on Customer Profile (checked). Options: Display Score (selected), Display Category Name, Display Category Name and Score.

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

Set up the right metrics to track which leads are highly qualified by setting up multiple scoring conditions. The following fields correspond to scoring:

- Sector
- Geographical Orientation
- Company Size

#	RULE NUMBER	ENTITY	SUM TYPE	POINTS	FIELD	OPERATOR	VALUE	ACTIVE	ACTIONS
1	1011	Lead, Prospect, Customer	ADD	35	Company Size	equals	1-5 Employees	✓	✎
2	1010	Lead, Prospect, Customer	ADD	40	Company Size	equals	6-20 Employees	✓	✎
3	1009	Lead, Prospect, Customer	ADD	45	Company Size	equals	21-50 Employees	✓	✎
4	1008	Lead, Prospect, Customer	ADD	55	Company Size	equals	51-100 Employees	✓	✎
5	1007	Lead, Prospect, Customer	ADD	60	Company Size	equals	101+ Employees	✓	✎
6	1006	Lead, Prospect, Customer	ADD	35	Geographical Orientation	equals	Multinational	✓	✎
7	1005	Lead, Prospect, Customer	ADD	25	Geographical Orientation	equals	Regional	✓	✎
8	1004	Lead, Prospect, Customer	ADD	20	Geographical Orientation	equals	Local	✓	✎
9	1003	Lead, Prospect, Customer	ADD	15	Sector	equals	Non-Profit Organization	✓	✎
10	1002	Lead, Prospect, Customer	ADD	20	Sector	equals	Public	✓	✎
11	1001	Lead, Prospect, Customer	ADD	30	Sector	equals	Private	✓	✎

Showing 1 to 11 of 11 entries

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

The Lead Scoring log provides the data relating to the scores of each lead and how they acquired this score based on the conditions you have set.

LEADS LIST (1)

1. Moiresette Bridgerton **SCORE: 76**
Jan 21, 2021

Moiresette Bridgerton **SCORE: 76**
Created on: Jan 21, 2021

Service Acquired: Full Manufacturing | Disposition: Awaiting Response | Status: n/a

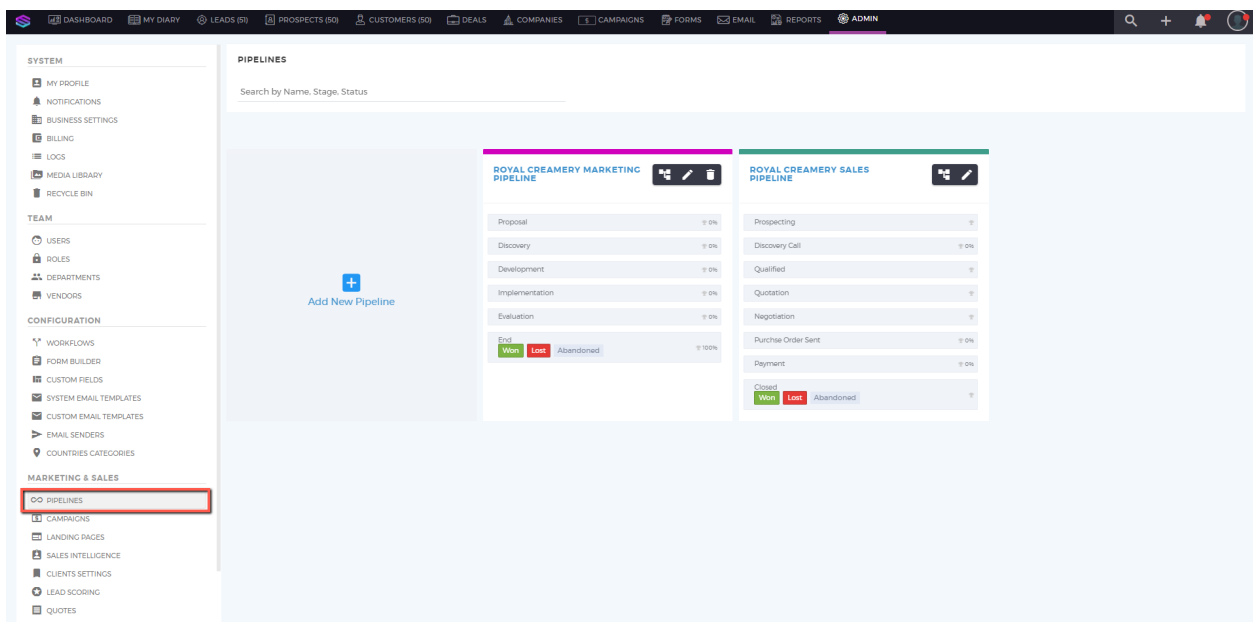
SCORING (1)

- 5 points reversed for not fulfilling the condition: Management System Certification **equals** ISO 9001 Certified. On Thu Jan 21 2021 16:40:52
- 5 points added for fulfilling the condition: Management System Certification **equals** ISO 10004 Certified. On Thu Jan 21 2021 16:40:52
- 40 points reversed for not fulfilling the condition: Company Size **equals** 51-100 Employees. On Thu Jan 21 2021 16:40:52
- 45 points added for fulfilling the condition: Company Size **equals** 101+ Employees. On Thu Jan 21 2021 16:40:52
- 24 points reversed for not fulfilling the condition: Geographical Orientation **equals** Multinational. On Thu Jan 21 2021 16:40:52
- 16 points added for fulfilling the condition: Geographical Orientation **equals** Local. On Thu Jan 21 2021 16:40:52
- 35 points reversed for not fulfilling the condition: Company Size **equals** 21-50 Employees. On Thu Jan 21 2021 16:58:04

5. SALES PIPELINE

Pitch: Have a visual representation of your sales process by setting up the stages of your sales pipeline. This will help you track your deals and monitor their progress. The Sales Process varies per business process.

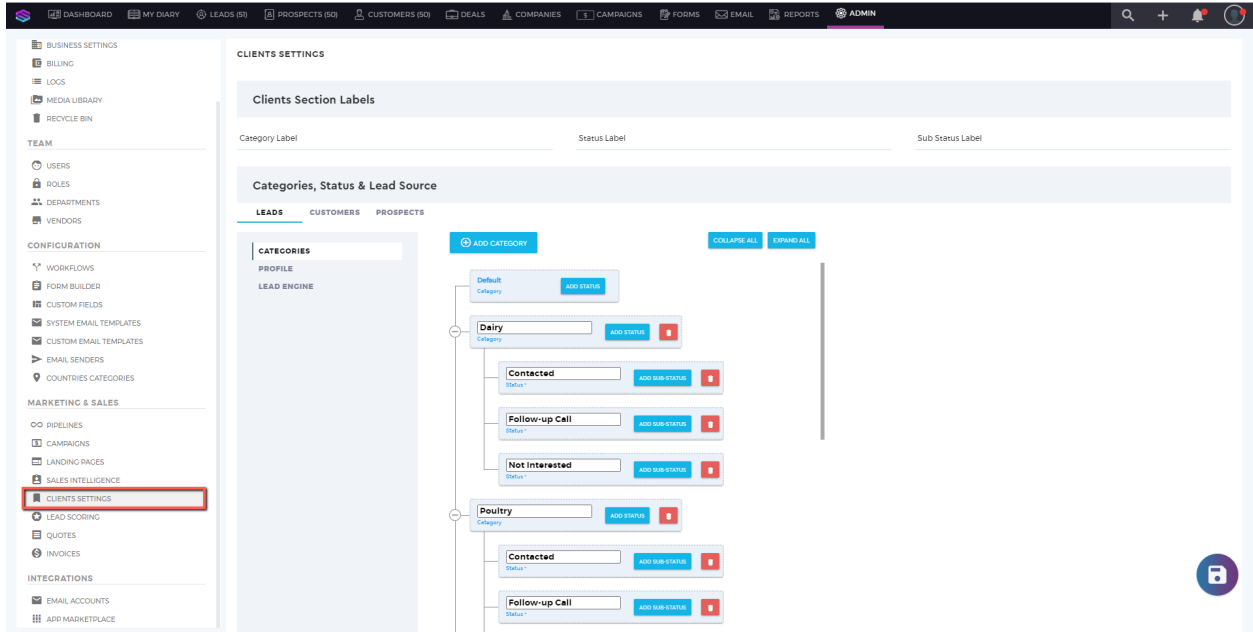
Demo: In Saphyte you can create multiple pipelines. In this workspace, two pipelines were created one for Marketing and the other is for its main Sales Pipeline. By creating multiple pipelines, you will be able to monitor the stages specific to your marketing efforts, likewise your sales development. Keep track of deals that are likely to close or churn, or amend the follow-up activities if needed.



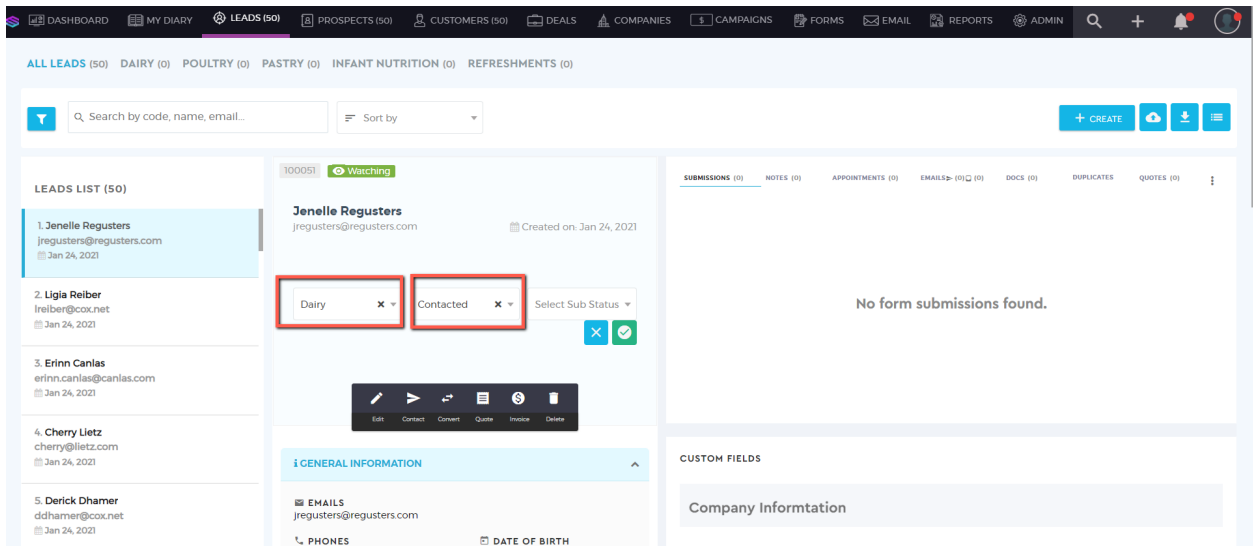
6. CATEGORIZATION

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: This workspace classifies its categories based on the types of products it produces namely, Dairy, Poultry, Infant Formula, and Beverages. The categorization is based on the types of operations. Please note that **Category (Product Type)** and **Status (Disposition)** only have validations. There is no Sub-status.



Note: You have to choose the category first before the status will appear. Categories appear on the header. Refresh the page to update the count of categories.



7. EMAIL SENDER

Pitch: Email Sender is a tool where you can sync different emails to the CRM and select which email will be the sender email. The Email Sender you choose will appear in the 'From:' field in the email received by the recipient.

Demo: Different email senders are created for this workspace depending on the nature of communication it is configured for:

- **Royal Creamery Support**- this email sender is for any customer related inquiries
- **Royal Creamery InfoBites** - this is for informational and marketing purposes
- **Royal Creamery Billing** - intended for billing purposes
- **Royal Creamery** - this is intended for system alerts and notifications

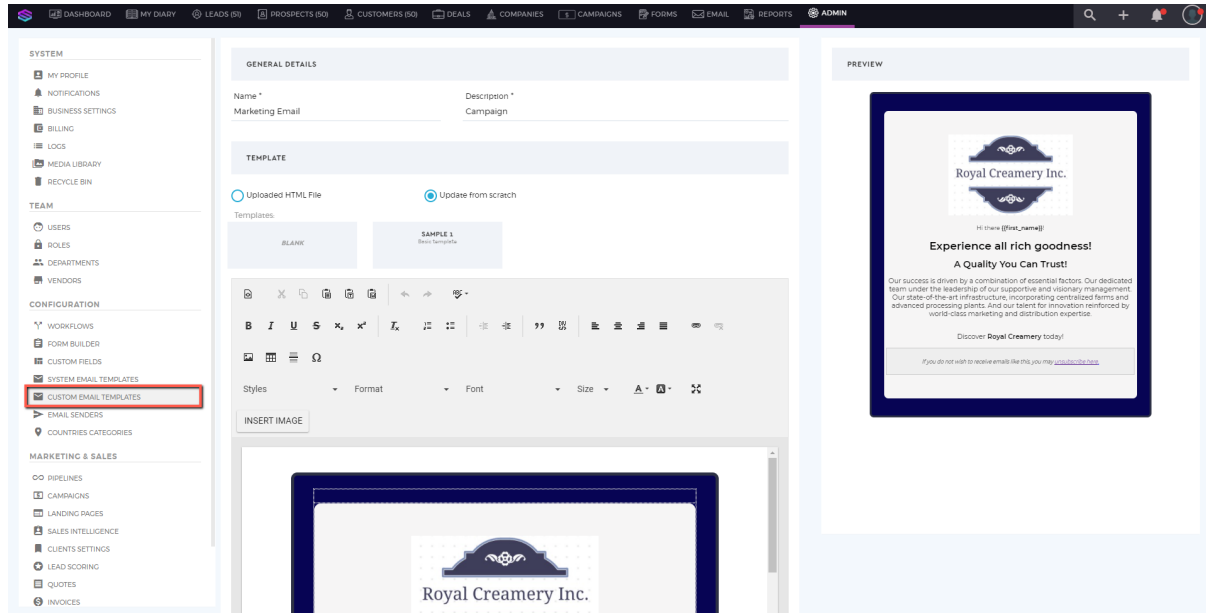
The screenshot displays the 'EMAIL SENDERS' configuration page in a CRM system. The left sidebar contains a navigation menu with 'EMAIL SENDERS' highlighted in a red box. The main content area features a search bar for 'Email or account name...', a dropdown menu for 'Active', and another dropdown for 'Confirmed'. Below these is a table with the following data:

ACCOUNT NAME	EMAIL	ACTIVE	CONFIRMED	ACTIONS
Royal Creamery Support	support.royalC@yopmail.com	✓	✓	[Edit] [Delete]
Royal Creamery Marketing	marketing.royalC@yopmail.com	✓	✓	[Edit] [Delete]
Royal Creamery InfoBites	info.royalC@yopmail.com	✓	✓	[Edit] [Delete]
Royal Creamery Billing	billing.royalC@yopmail.com	✓	✓	[Edit] [Delete]
Royal Creamery	notifications.royalC@yopmail.com	✓	✓	[Edit] [Delete]

8. CUSTOM EMAIL TEMPLATES

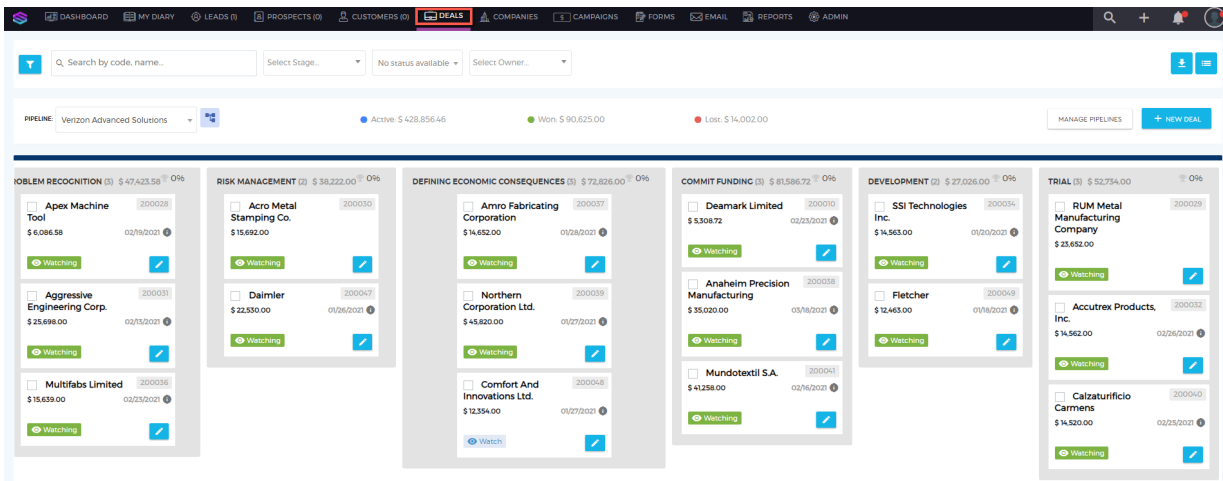
Pitch: Instead of drafting emails every time, you can create and store custom email templates to make your email marketing easy and ready. Increase your lead conversion rate faster using email design templates, bulk emails, workflows, scheduler, email tracking, and more.

Demo: The email template is a predesigned or prewritten email that is used for sending business emails to retained and potential customers. You can replace the content with your preference such as your business logo, product detail, and signature.

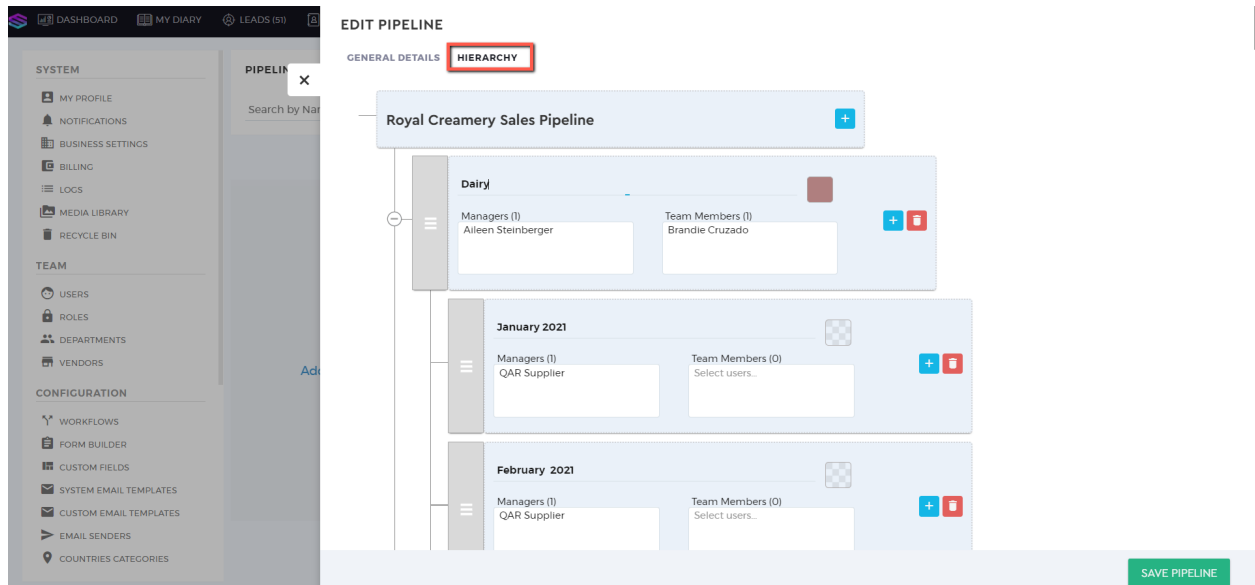


9. DEALS

Pitch: Have the visibility of the movement of all your sales opportunities and know your forecasted income through the Deals Management. You can also categorize your deals according to sectors, team hierarchy, timeline, milestones, and many more to suit your business process.



Demo: This workspace has categorized the product types into hierarchies. This too is subdivided into months to project the monthly performance of each product, for better assessment and evaluation.



10. WEB FORMS - INQUIRY FORM

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

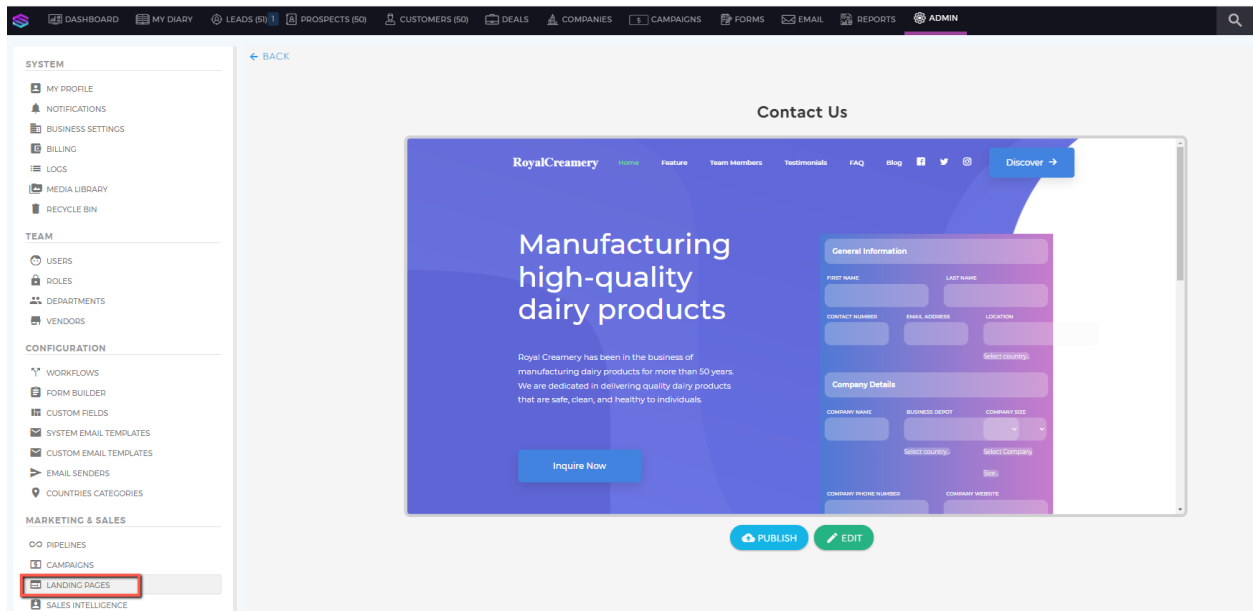
Workflow Name: : Contact Us

Form Name: Contact Us

<https://qar-supplier.hosted-form.com/h/CHy69YAHT>

Demo:

- Launch Landing page link: <http://qar-supplier.hosted-page.com/contact-us>
- Fill out the Inquiry Form
- Refresh the LEADS section to check the information captured



11. 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:

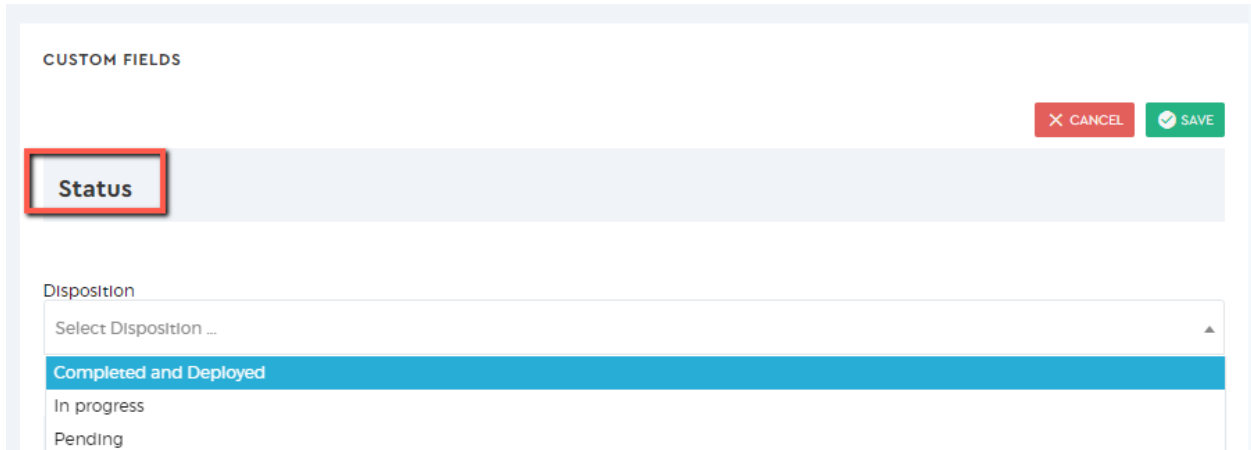
Workflow Name: Scheduled Feedback Survey

Form Name: Feedback Form

Link: <http://qar-supplier.hosted-form.com/h/bK7KsUgTC>

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

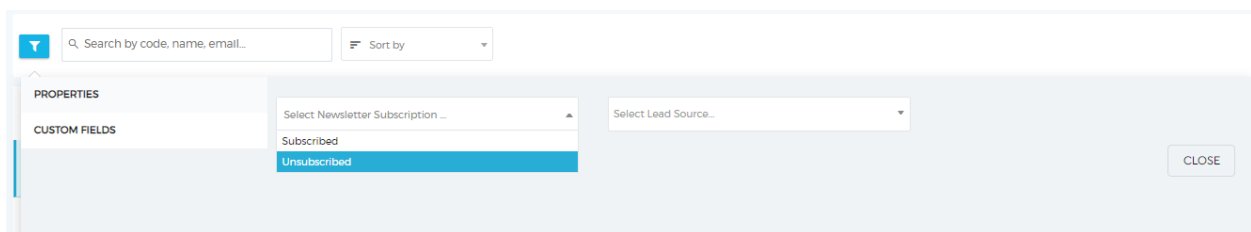
- Go to '**Customers**' tab
- Select a customer profile
- Under Status > Choose 'Completed and Deployed'



d. Check the demo email for the automated survey response

12. 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

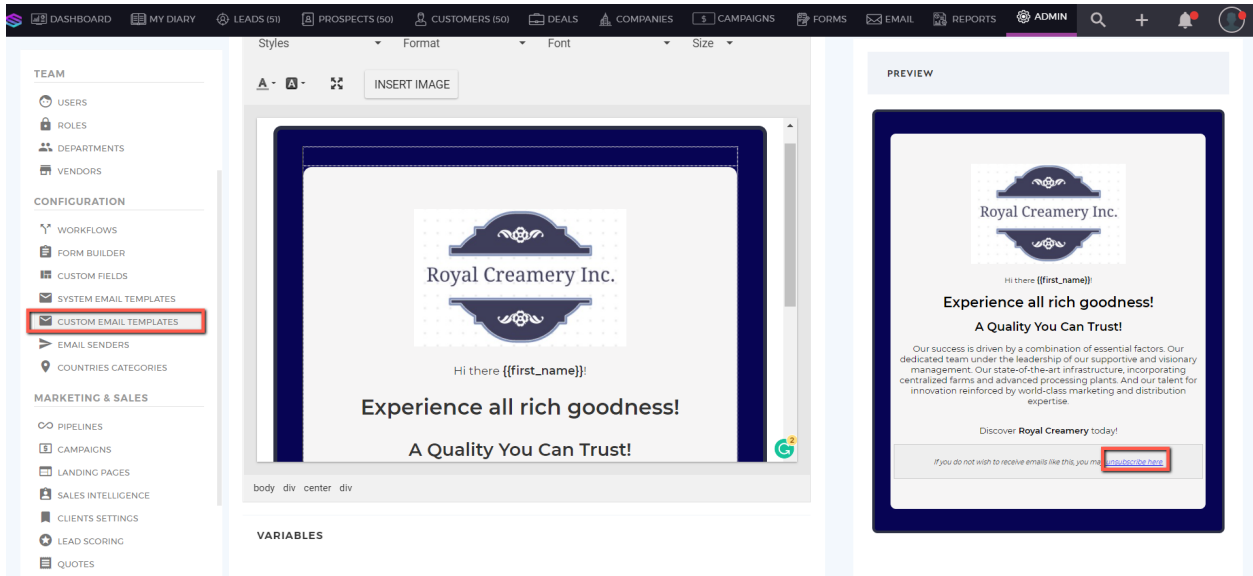
Link: <https://qar-supplier.saphyte.cloud/admin/mailbox/custom-templates>

2. Check the footer for the unsubscribe link (preview pane)

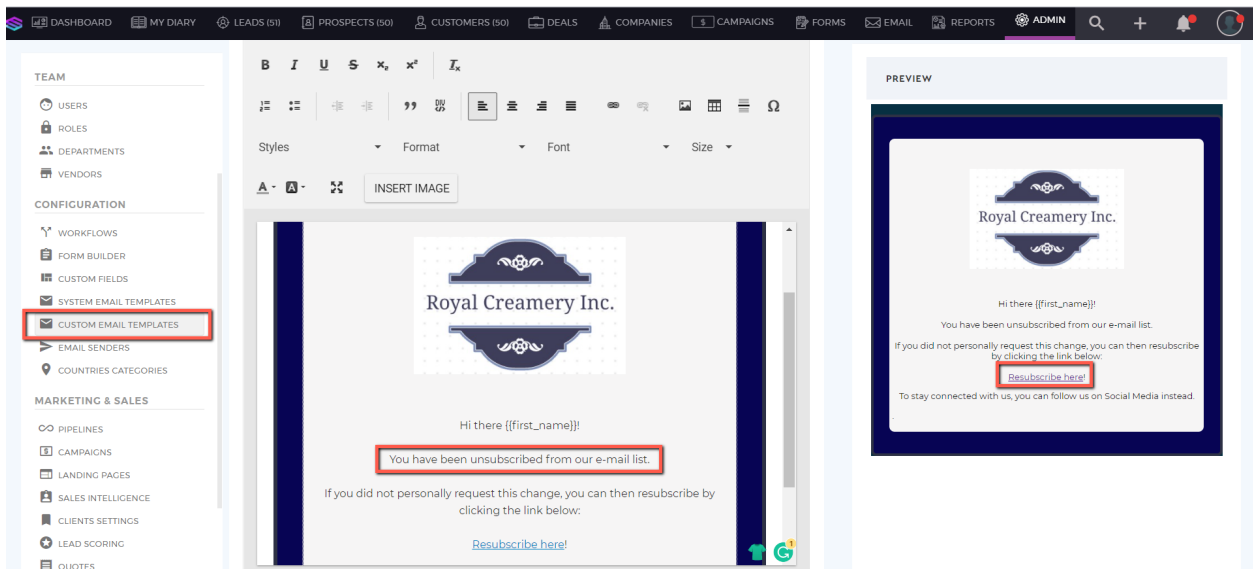
3. Click on the link to redirect to the unsubscribe page

To test the email: Lead > Contact > Send from template

They can simply unsubscribe to the newsletter by clicking on the 'unsubscribe' link.



Once done, an unsubscribe success message will be sent automatically as a notification that the action has been successfully done. If they wish to resubscribe, they can simply click on the 'resubscribe' button.

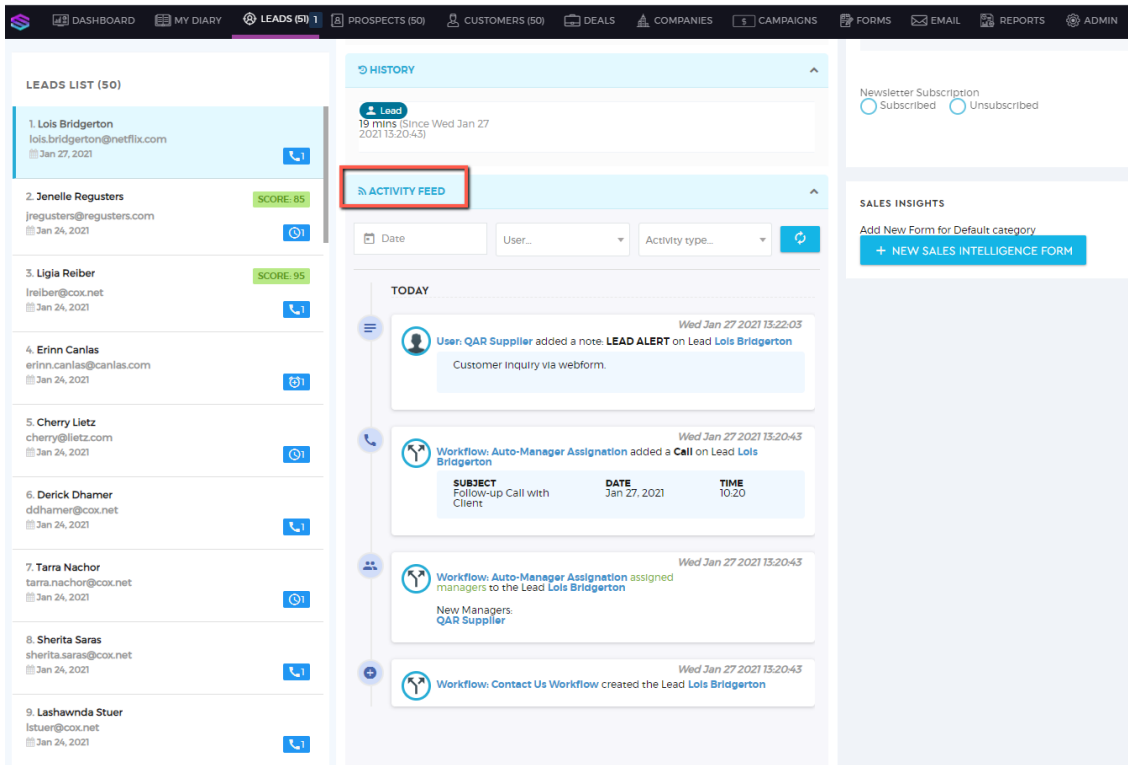


13. AUTO-ASSIGN MANAGER WHEN A LEAD IS CREATED AND AUTOMATE EMAIL FOR LEAD ALERT

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:

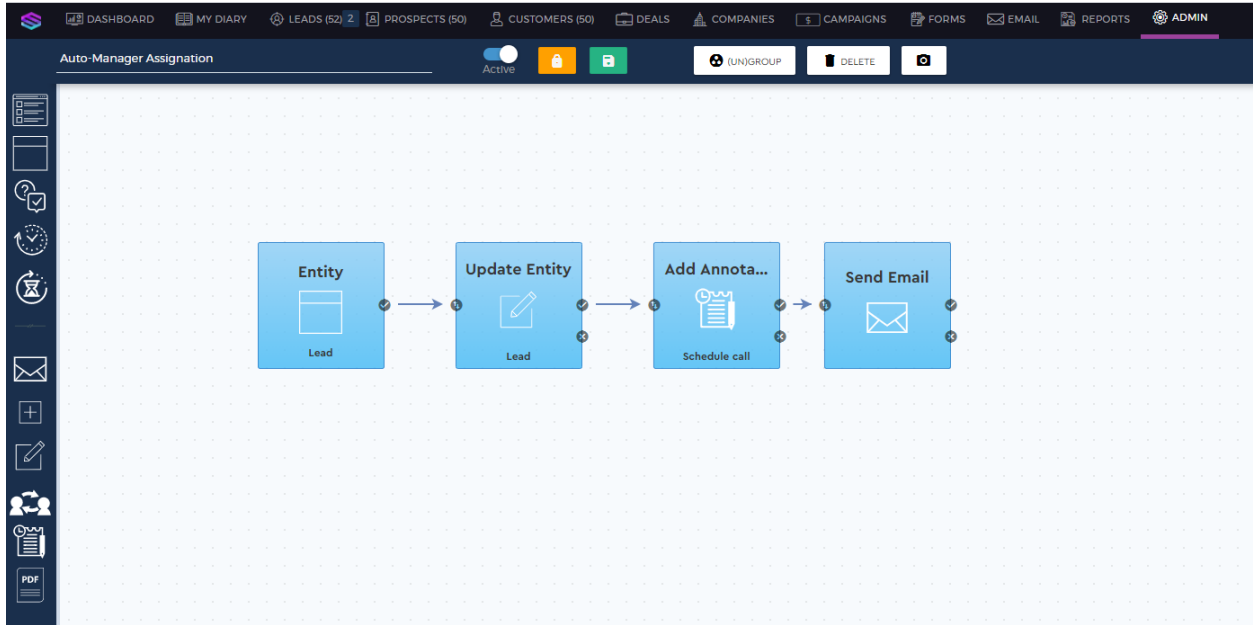
- a. Work only on leads section for this demo
- b. Create a LEAD and fill out the:
 - Name
 - Email - make sure to use yopmail.com as the domain. For example name@yopmail.com - this is to execute the workflow for the onboarding
 - Phone - random numbers will do
- c. Show the activity feed that there 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



AUTOMATED EMAIL / AUTO-ASSIGN TO A MANAGER

Pitch: We can automate 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 Manufacturers and Suppliers: <https://qar-supplier.saphyte.cloud/admin>
Workflow Name: Auto-Manager Assignment



- a. This workflow only works when a lead is created and gets automatically assigned to a manager in an iterative manner.
- b. The manager is then notified to call the lead within one hour.
- c. The manager will also receive an email in the Saphyte Demo email account for the lead alert (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

The screenshot shows the Saphyte system interface. The top navigation bar includes "DASHBOARD", "MY DIARY", "LEADS (2)", "PROSPECTS (50)", "CUSTOMERS (50)", "DEALS", "COMPANIES", "CAMPAIGNS", "FORMS", "EMAIL", "REPORTS", and "ADMIN". The main content area is titled "ALL LEADS (52)" and includes a search bar and a "Sort by" dropdown. Below this, there is a "LEADS LIST (50)" section with three entries:

- 1. Lois Bridgerton (lois.bridgerton@netflix.com, Jan 27, 2021)
- 2. Jenelle Regusters (jregusters@regusters.com, Jan 24, 2021)
- 3. Ligia Reiber (lreiber@cox.net, Jan 24, 2021)

The detailed view for Lois Bridgerton is shown, including her contact information, a "Contact Us Webform" progress bar, and a table with columns for "CATEGORY", "STATUS", and "SUB STATUS". The "EMAILS" tab is highlighted, showing a list of "EMAILS SENT" and "EMAILS RECEIVED". The "EMAILS SENT" list includes an entry with the subject "WE HAVE RECEIVED YOUR INQUIRY" and the sender "From: notifications@saphyte.com".

14. 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: Drip Marketing

<https://qar-supplier.saphyte.cloud/admin/workflows/600e6d8d83cefe40f2132222>

