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**

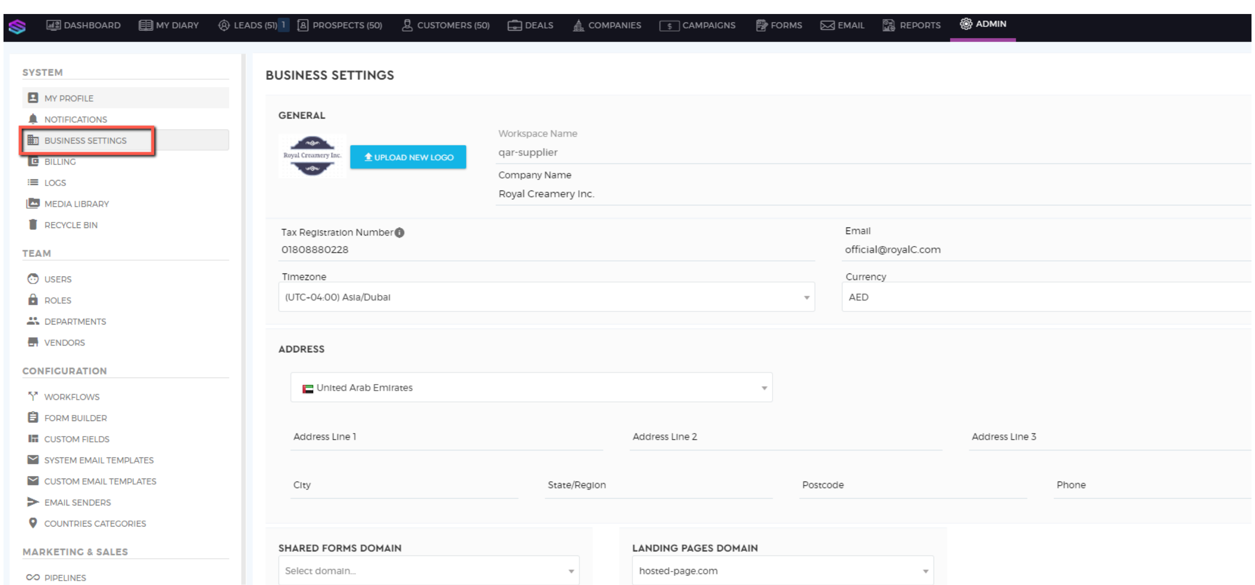
Log in on the email account using the below credentials:
Username: demo@saphyte.com
Password: Saphyte2021

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.



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.

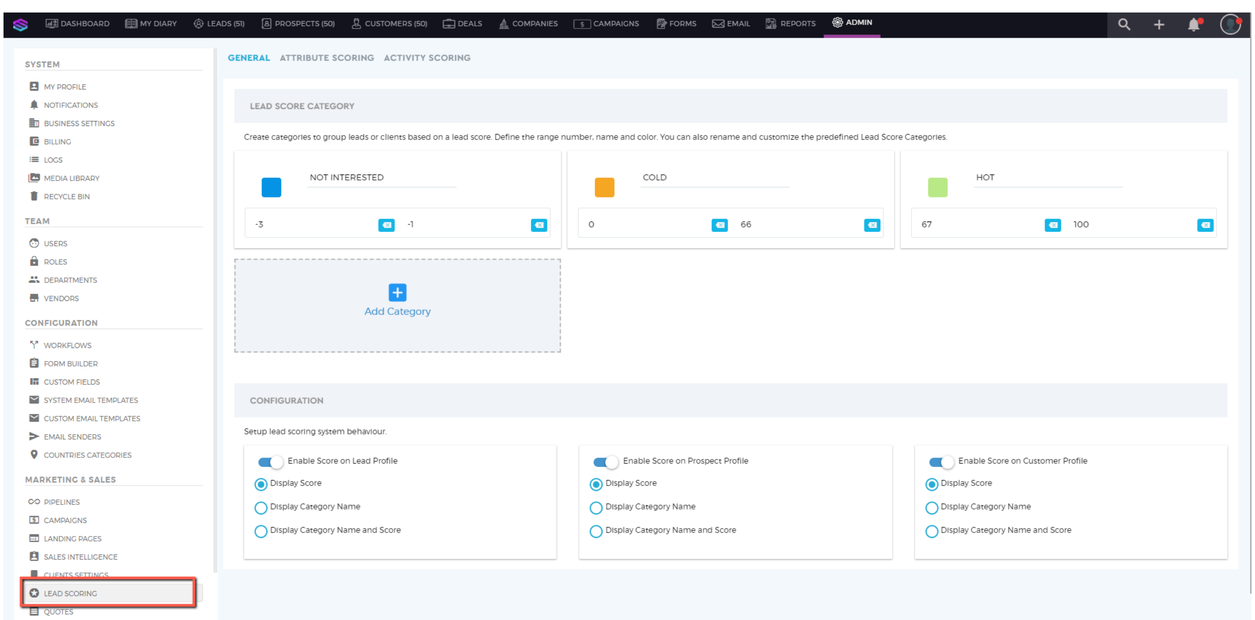
Demo:

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.

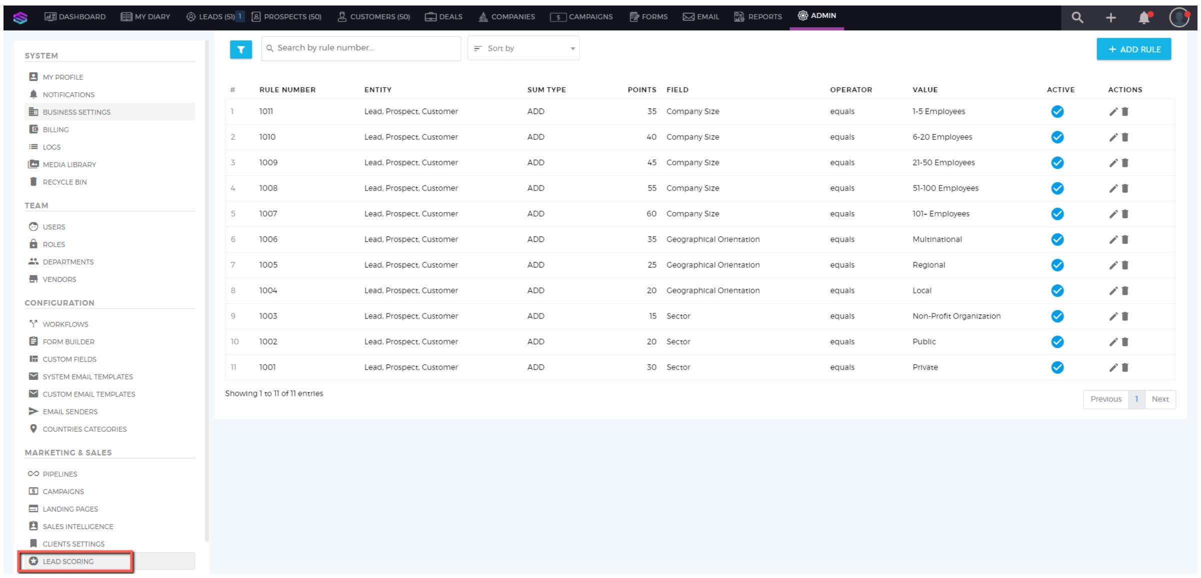
HOT LEAD - is considered as a qualified lead who is highly interested in your product or service, and is ready for direct contact to close a sale.



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

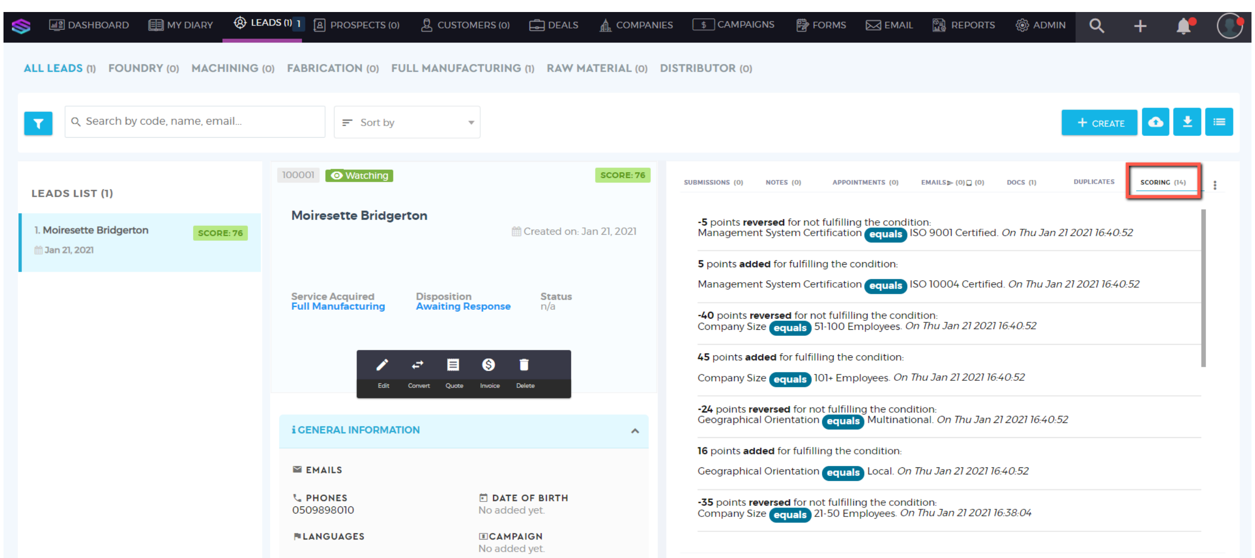
Set up the right metrics to track which leads are highly qualified by setting up multiple scoring conditions. The following fields correspond to scoring:

- **Sector**
- **Geographical Orientation**
- **Company Size**



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

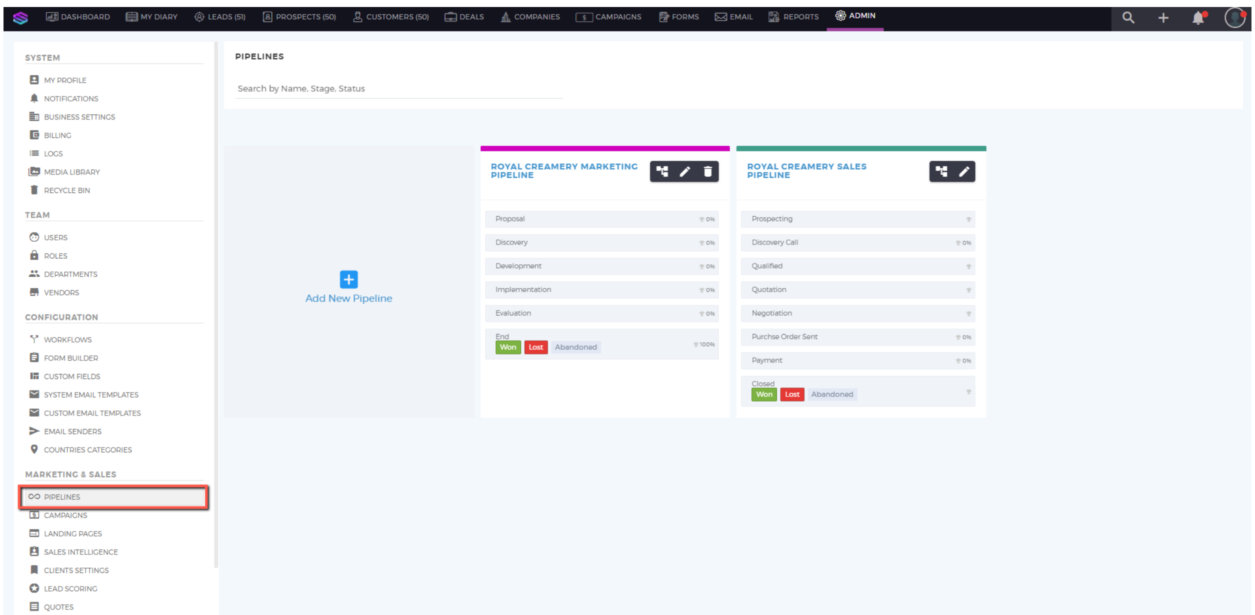
The Lead Scoring log provides the data relating to the scores of each lead and how they acquired this score based on the conditions you have set.



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.

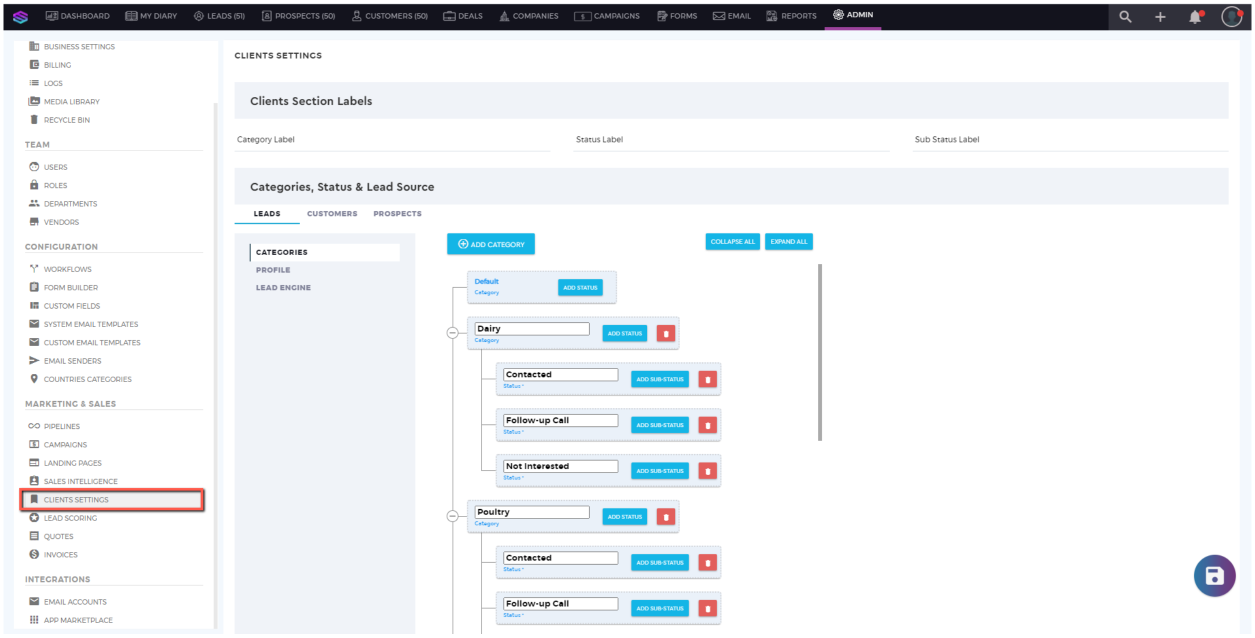
Demo: In Saphyte you can create multiple pipelines. In this workspace, two pipelines were created one for Marketing and the other is for its main Sales Pipeline. By creating multiple pipelines, you will be able to monitor the stages specific to your marketing efforts, likewise your sales development.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



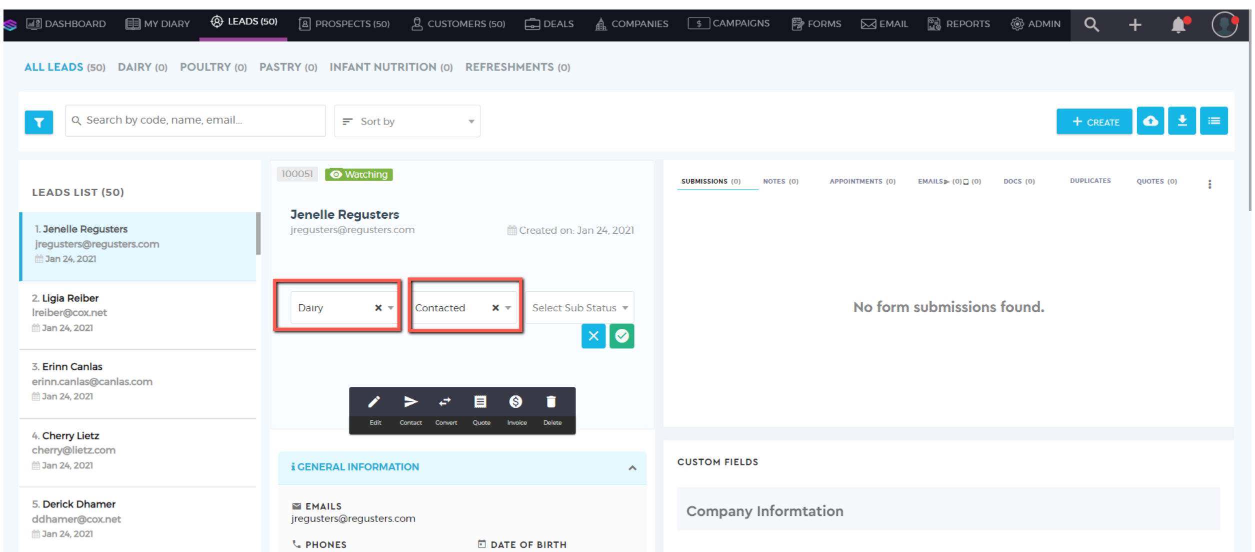
6. CATEGORIZATION

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.

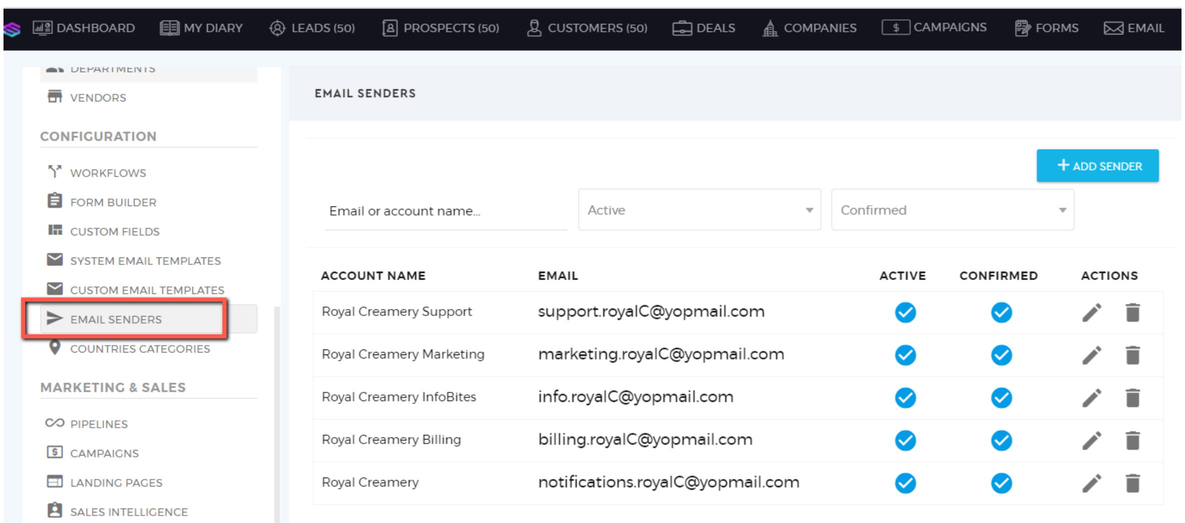


7. EMAIL SENDER

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:

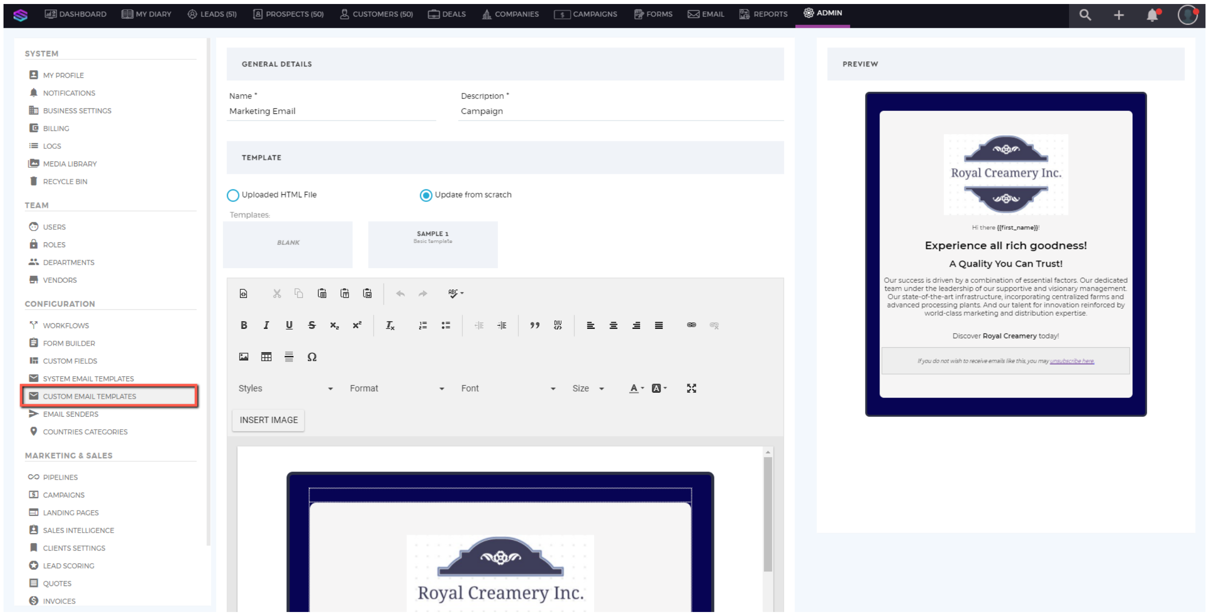
- **Royal Creamery Support**- this email sender is for any customer related inquiries
- **Royal Creamery InfoBites** - this is for informational and marketing purposes
- **Royal Creamery Billing** - intended for billing purposes
- **Royal Creamery** - this is intended for system alerts and notifications



8. CUSTOM EMAIL TEMPLATES

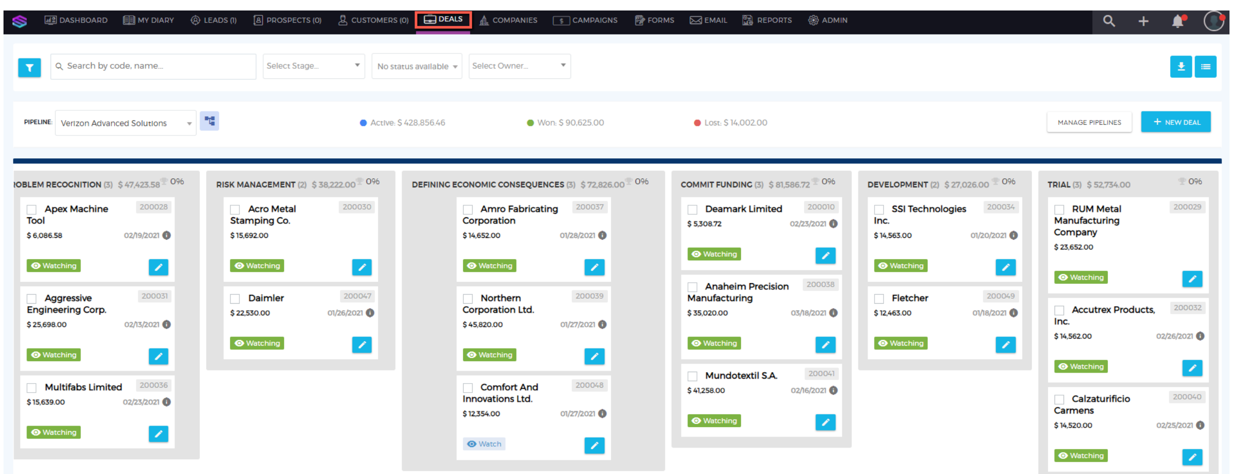
Pitch: Instead of drafting emails every time, you can create and store custom email templates to make your email marketing easy and ready. Increase your lead conversion rate faster using email design templates, bulk emails, workflows, scheduler, email tracking, and more.

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.

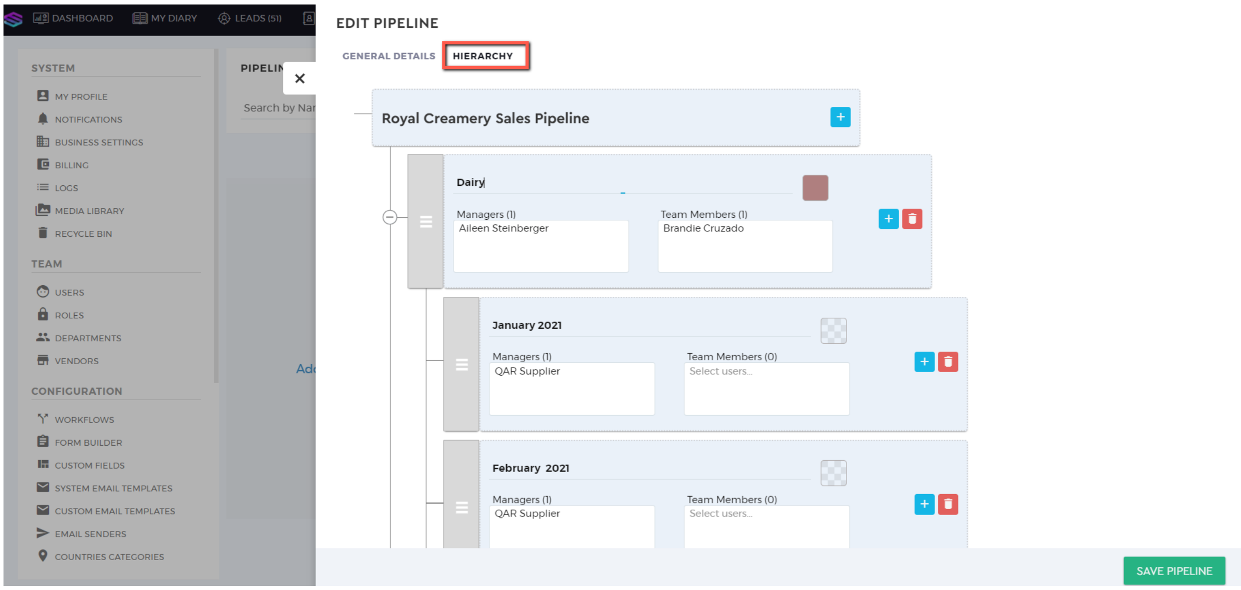


9. DEALS

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.



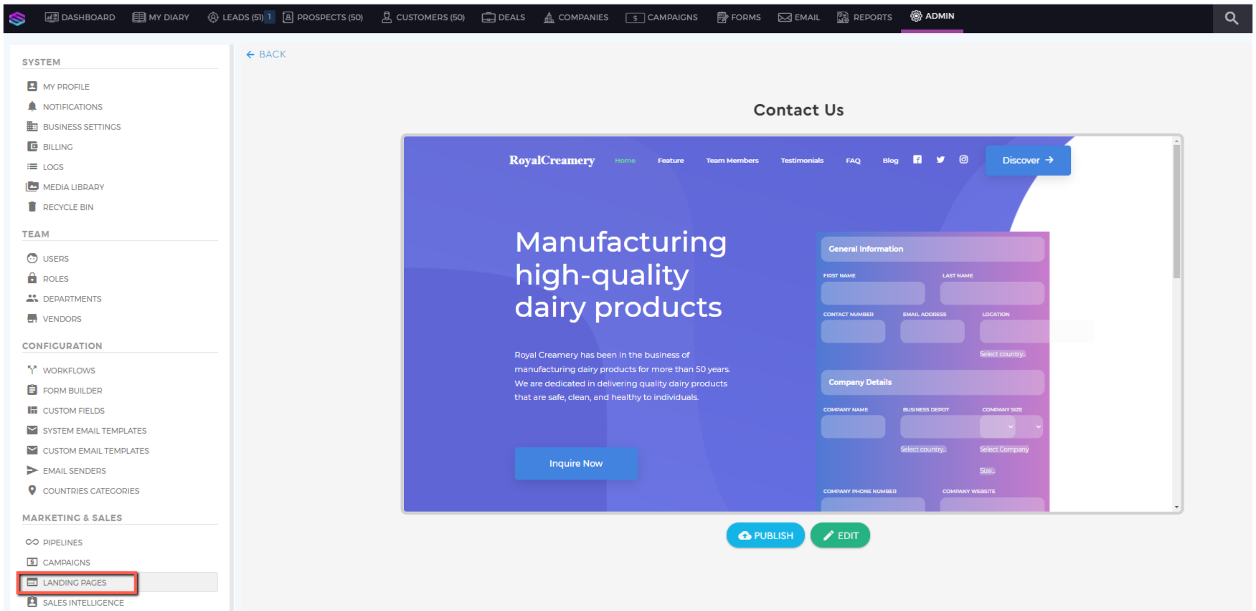
10. WEB FORMS - INQUIRY FORM

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:

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



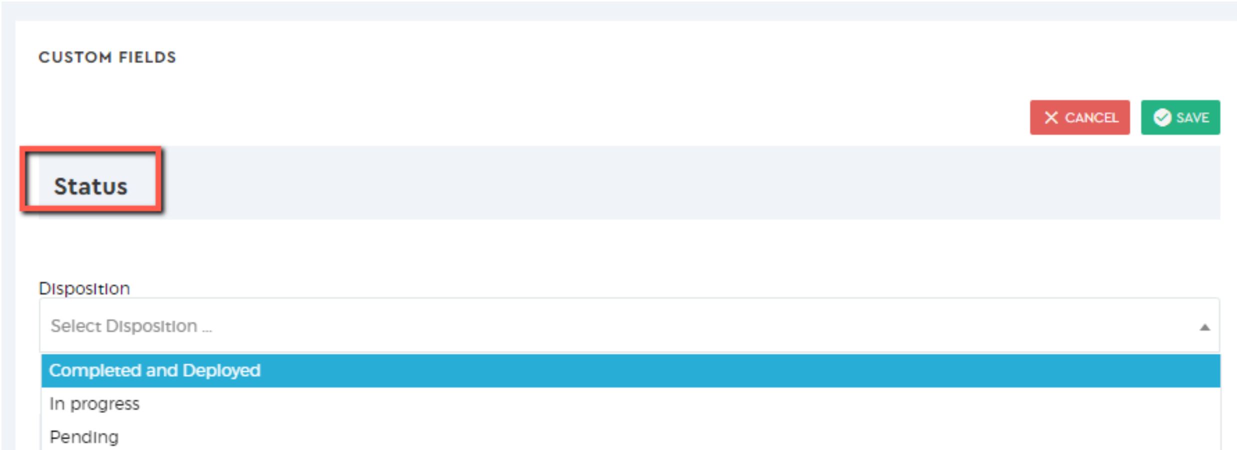
11. CUSTOMER SATISFACTION SURVEY

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.

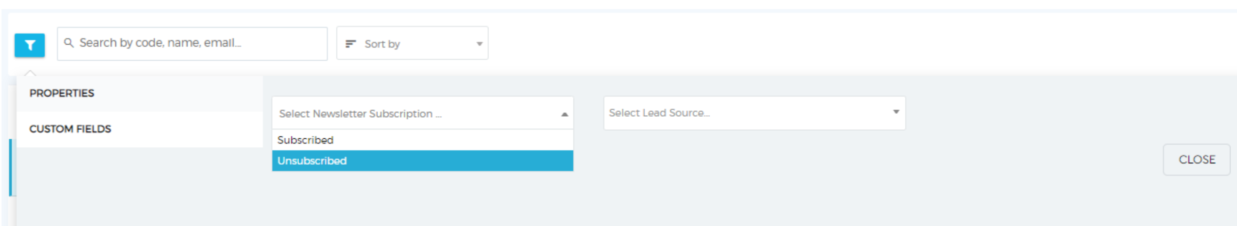
a. Go to **'Customers'** tab
b. Select a customer profile
c. Under Status > Choose 'Completed and Deployed''



d. Check the demo email for the automated survey response

12. NEWSLETTER UNSUBSCRIPTION

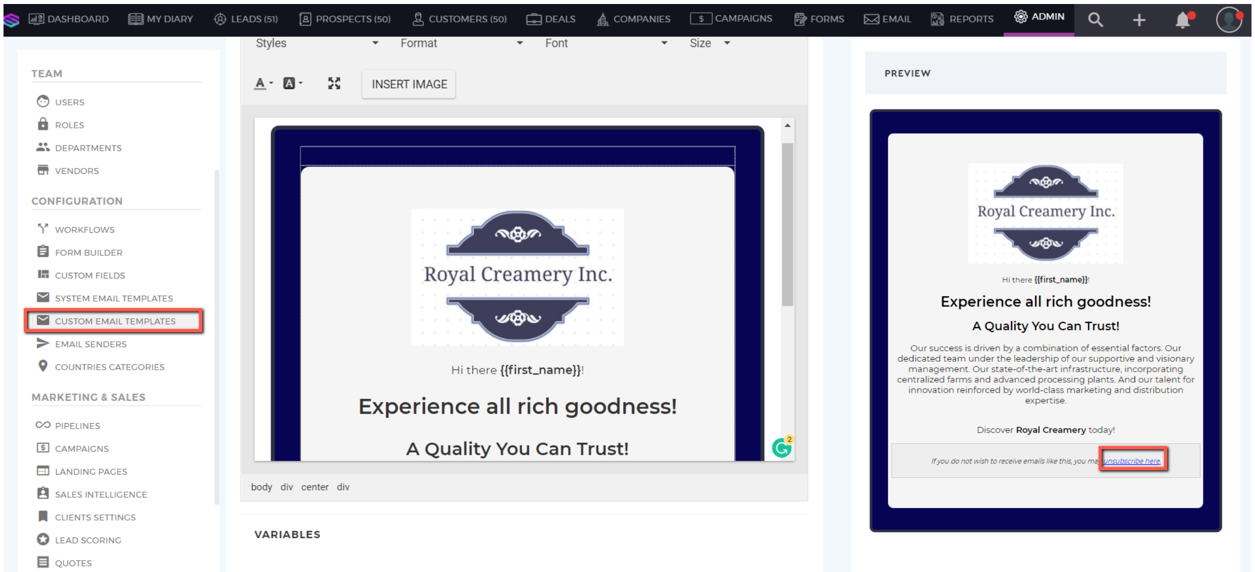
Pitch: You can provide your customers with the preference to opt-in or out of your email services through Saphyte's GDPR Compliance capabilities. You can filter which clients have unsubscribed to your newsletter and skip to send them any emails.



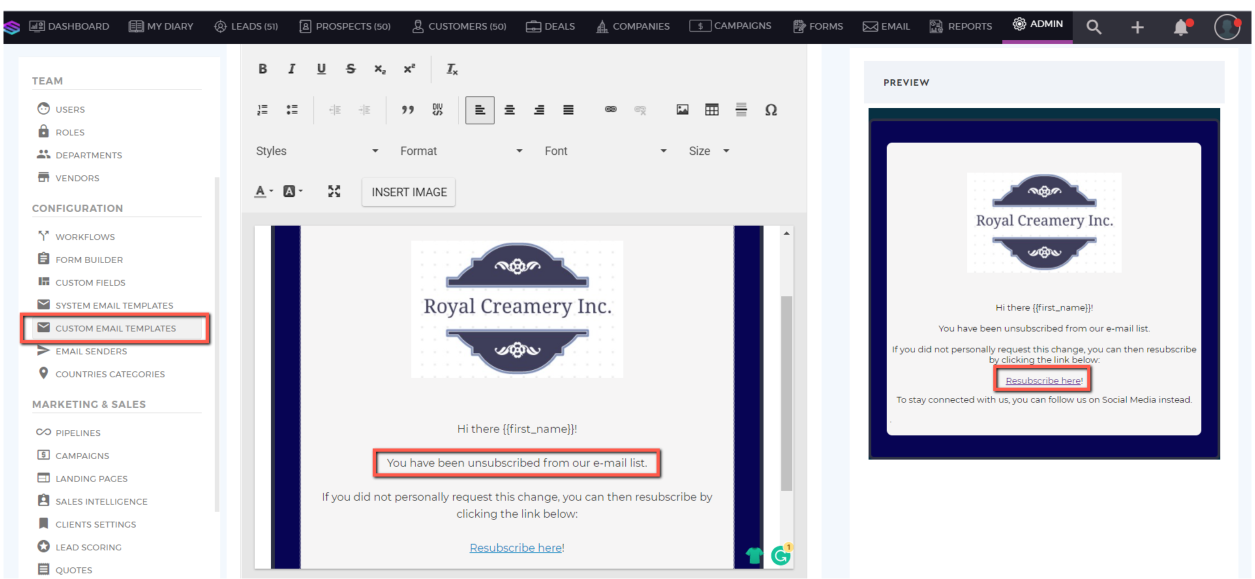
Demo:

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:

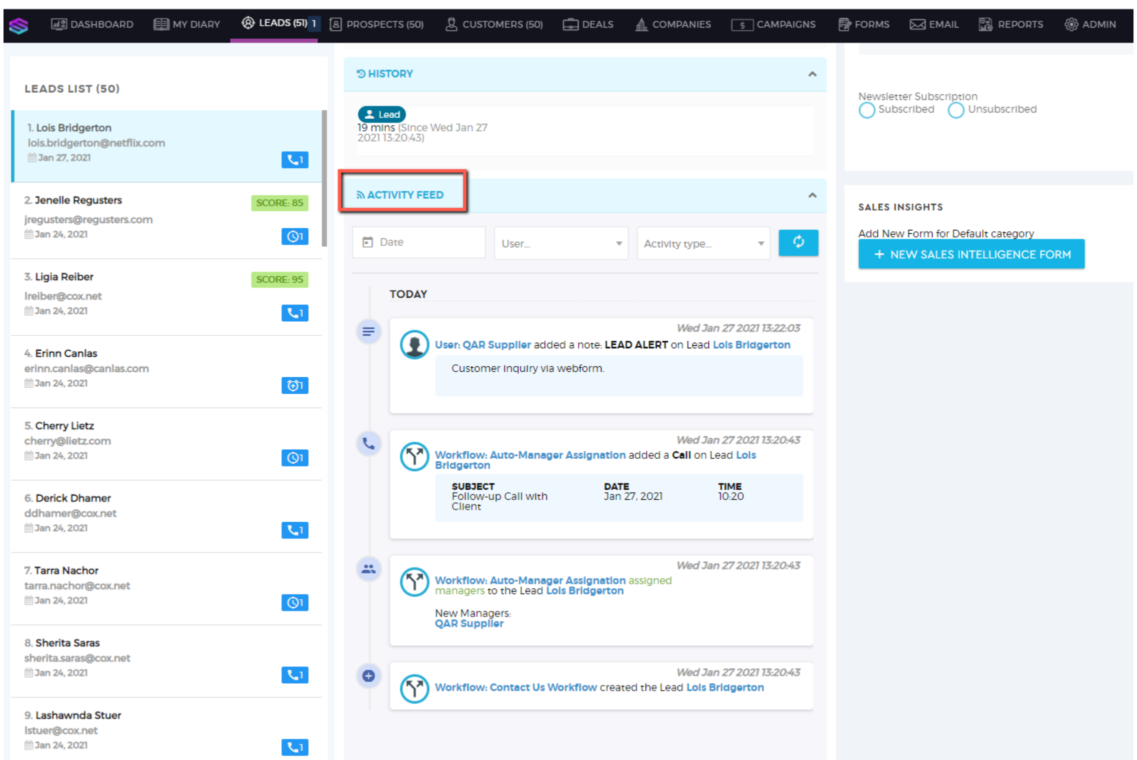
a. Work only on leads section for this demo

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

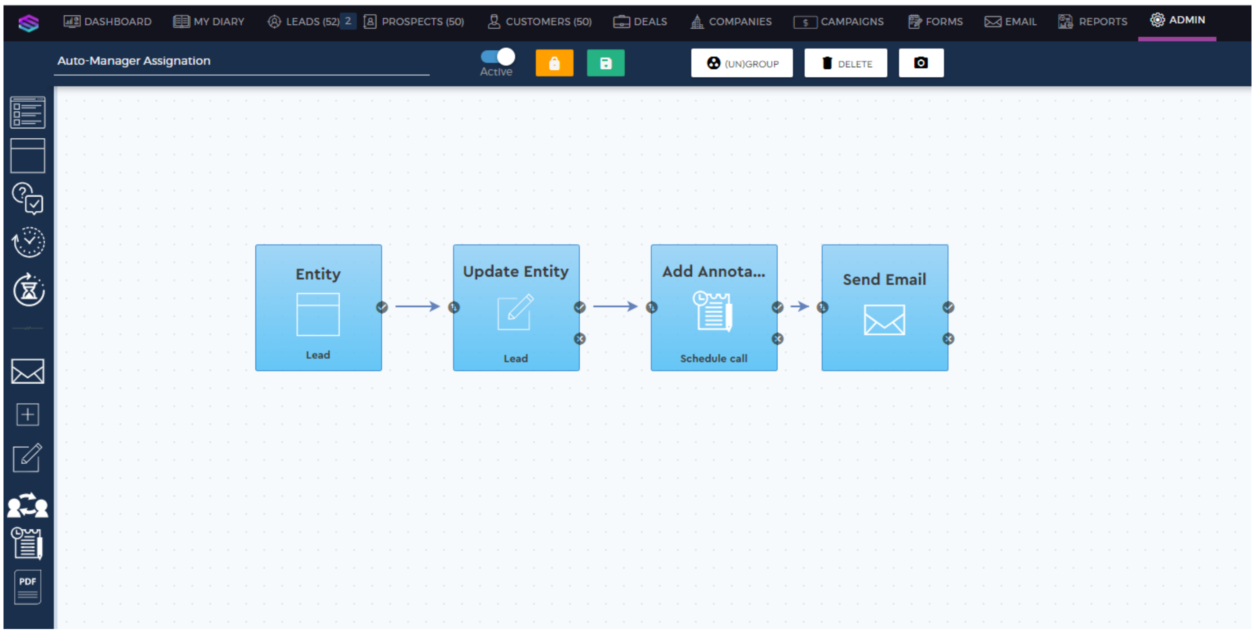
d. Show that an automated reminder to call the client appears under the appointment section



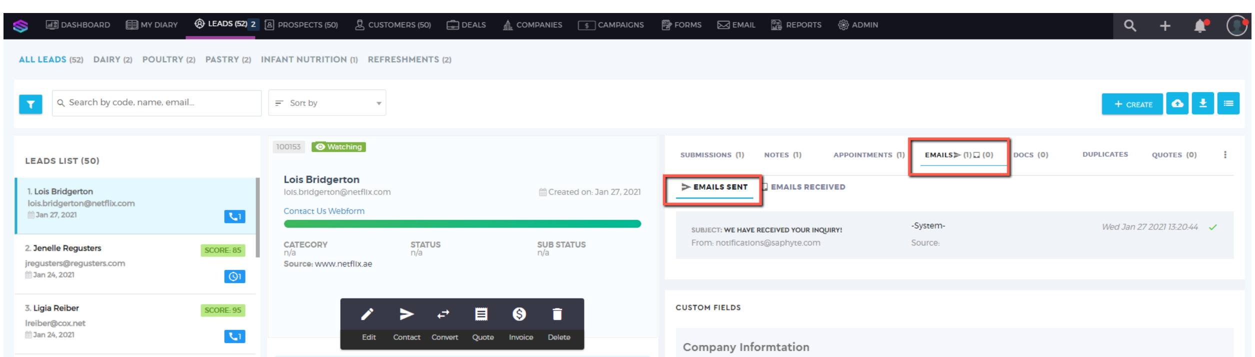
AUTOMATED EMAIL / AUTO-ASSIGN TO A MANAGER

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 Assignation



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



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