SAPHYTE FEATURES PITCH

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Team Management

1. Customizable Dashboard

Hook: Understand and interpret your data in one glance.

1.1 What is a Dashboard?

A Dashboard is a graphic user interface that allows you to immediately visualize your data and understand your analytics. A dashboard may contain the relevant KPIs particular to your objective or goals. It could also display important information from multiple data sources in one place.

1.2 Personalize your Dashboard.

Personalizing your dashboard is as easy as attaching Legos. Customize how you want your dashboard to look by dragging and dropping widgets (these are the building blocks of your dashboard). You can place your widgets anywhere in your work area, resize and re-arrange them.

1.3 Keep your favorite information at your fingertips.

Get quick access to information without having to do multiple clicks around your workspace. The customizable widgets available in your dashboard automatically pull up specific pieces of information from your database and translate them into visuals for easier understanding.

1.4 Track the data that only matters to you.

Having the ability to customize your dashboard means having the control to select and track the data that are only relevant to you.

1.5 Have a visual tracking station for your team.

Boost your team engagement and keep them in the know of the team's performance by sharing your team-level dashboard with them. This helps your team visualize the trends and occurrences that are happening in the business.

2. Reporting

Hook: Take the guesswork out of your business decisions by having a clear view of where your company stands at every level.

2.1 Sales Reports

Appear in your meetings prepared with useful data by using predefined sales reports built in the system.

- Number and value of deals per stages of pipeline
- Rate of deals moved across all pipeline stages
- Summary of the status of deals
- Different trends happening in the sales volume over a certain time
- Forecasted revenue for this month
- Performance of sales executives
- Number of leads per scoring category

2.2 Marketing Reports

Make data-driven decisions from these pre-defined marketing reports.

- Number of emails opened and clicked
- Campaigns by type
- Campaigns by pipeline
- Number of conversions per campaign
- Conversion History

2.3 Custom Report

Build your report from scratch in 4 simple steps:

1. Select the type of report you want to generate
2. Choose the data attributes
3. Define the criteria of your data
4. Preview and export your report

3. Workflow Automation

Hook: Kick the manual habit and start simplifying and automating your work.

3.1 You are the master of your workflow.

Teach the system what to do by triggering certain actions based on conditions that you set.

3.2 Visualize your workflow.

With Saphyte, building your workflow is not that complicated. You can build your workflow and at the same time visualize it by dragging, dropping, and connecting workflow nodes.

3.3 What processes can you automate in Saphyte using workflows?

There are many processes that you can automate using our workflow and here are some of them.

1. Sending Onboarding Email
2. Drip Email Marketing
3. Schedule newsletters and other marketing emails
4. Newsletter Subscription
5. Auto Reminder (Payment, Docs) - user(s) will be reminded when it's due to collect payments or when documents are expiring
6. Client Survey/Feedback
7. Automate capture of online/web forms such as the Contact Us form and store the information in the CRM
8. Auto-assign Leads, Prospects, Customers to managers in different distribution types (such as Round Robin, Random, etc.)
9. Auto-email responder
10. Blacklist or Whitelist Countries
11. Onboard new team members by creating user profiles for them
12. Categorize Leads/Prospects/Customers
13. Convert leads into prospects and customers
14. Generate a PDF of the form response
15. Verify emails
16. Automated Alerts / Notifications
17. Auto-assignation to departments, vendors, and other attributes
18. Automatically create Company Profiles
19. Identifies Lead Source
20. Trigger automation based on Lead Scoring
21. Identify duplicates
22. Trigger automation based on Custom Fields
23. Collect documents from your customers
24. Assign tickets to different departments

3.4 Benefits of automation

Increased productivity and efficiency	Eliminating manual processes means giving your employees more time to focus on creating ingenious business plans, thinking of innovative ideas, making important decisions, etc.
Reduced operational costs	Save labour costs and human energy by increasing your service to the customer while systematically reducing costs and focusing on other tasks that matter more.
Faster ROI	Automating your tasks means paying for itself quickly due to lower operating costs, reduced lead times, increased output and more.
Ability to be more competitive	In this digital age, adapting to technology means getting ahead of your competitors who has not yet moved into the tech space. Automation cuts the time spent on manual processes and therefore increase the productivity of your team.
Allow new business opportunities	Automation allows the ability to configure and support assets in fields you could not even have thought about while using only human resources.
Increased reliability	Human error is inevitable in manual intervention. By automating tasks, errors can be minimized.
Go digital	Eliminate the manipulation of paper documents and optimize time spent looking for information

4. User Management

Hook: Secure your workspace with user-based access control.

4.1 Control what your users can do around your workspace.

There is no rocket science in providing permissions or restrictions to your users. All you just must do is tick the boxes of roles that you would want your users to operate.

4.2 Set multiple layers of access security.

You can set up an unlimited number of roles and assign them to the organizational, departmental, or individual level.

4.3 Collect and store your team's information.

Capture different information relevant to your users and store their documents in their profiles for easy monitoring.

4.4 Deactivate non-active users to save money.

You have the control to temporarily or permanently activate or deactivate your non-active users (e.g., users on annual leave) and only be billed according to days of activity.

5. Logs

Hook: Centralized and secure log monitoring.

5.1 Time-efficient monitoring

With the different filter options, you can drill down particular events that happened across or root causes of a problem in your system in one quick search.

5.2 Centralized log data

Log records are a key piece in any robust security strategy and placing them all in a single location allows you to obtain a much more granular overview of the current situation and keep everything you always need at hand.

5.3 Unique information for each event

For auditing purposes, each log event is identified with a unique code.

5.4 Monitor what happens in your system.

Know what your users have performed in the system and easily identify any anomalies or breaches.

6. Custom Fields

Hook: Mine rich data using custom fields and grow your database.

6.1 What is a Custom Field?

A custom field is a container where you can store and capture unique and important pieces of information.

6.2 Business Value

We understand that each company needs to capture and track data that are unique to their business. To support specific business processes, Saphyte provides you with the ability to create custom fields that are customizable and adaptable.

6.3 How can custom fields add value to your business?

- Know your customers more and in-depth
- Capture different types of information
- Helps you with data-driven decision making
- Easily segment and categorize your data based on particulars

7. My Diary

Hook: Manage your time wisely with My Diary.

7.1 **Measure your KPIs.**

If one of your KPIs is productivity, then you can easily measure how productive are your team members by monitoring their day-to-day activities (how many calls have been made, how many meetings have been set, how many follow-ups have been done, etc.) in one dashboard.

7.2 **Keep up with your busy schedule.**

It's easy to get lost in a day's busy schedule but the My Diary allows you to filter specific types of appointments you have for the day and nudges you with multiple reminder alerts so as not to miss an appointment.

7.3 **An organized and synced calendar.**

For the ones who are very particular with organizing their schedule, Saphyte helps you sync your appointments from Saphyte to your favorite calendars.

8. System Notifications

Hook: Never miss an opportunity!

8.1 **Receive notifications from different mediums.**

Get instant notifications from three different mediums: desktop, mobile, or email -- depending on which platform you enabled your notifications on.

8.2 **Be notified of what matters to you.**

Have the ability to receive the notifications that are relevant to you by selecting your notification preferences or watching specific modules in the system.

8.3 **Or be notified about everything.**

Depending on your role, you can choose to be notified of everything that is happening on all the modules that have the notification settings.

Sales Management

1. Sales Pipeline

Hook: Monitor your customers' journey at a glance

1.1 What is a Sales Pipeline?

Sales pipelines are a visual representation of your customers' journey-- from leads into paying customers.

1.2 Easy management.

Set up the stages of your sales and identify elements in the pipeline quickly with our color-coding option.

1.3 Access restriction.

Some data is not meant to be viewed by everyone. Gain greater flexibility by restricting access to your pipeline and make it private or public, whichever you like.

1.4 Customizability

Get a pipeline that matches your unique sales processes. Set your pipelines in multiple currencies. Explore more options for customization.

1.5 Set for success.

Sell smarter. Focus on the deals that matter. Get a 360-degree view of the performance of your team.

2. Sales Hierarchy

Hook: Gain better flexibility in categorizing deals. Arrange them according to sectors, team hierarchy, timeline, milestones, and more.

2.1 Better data arrangement.

Add data and arrange them in hierarchy form.

2.2 Quick interpretation of your data.

Zero stress in interpreting data— all it takes is just a quick glance at the hierarchy and know the status of your deals on each vertical.

2.3 Add multiple layers of hierarchy.

You can set your sales hierarchy up to four layers. The upper hierarchy can see the information of the below hierarchy and the below hierarchy will only have visibility of deals of the same level.

3. Deals Management

Hook: Gain more control over your deals and estimate their impact on your business.

3.1 **Better visual representation**

Know the movements of your deals with just a glance. Use color labels to quickly identify deals that matter.

3.2 **One-click report.**

In just one click, get an organized report about your deals instantly.

3.3 **Stay up to date.**

An activity feed is available to keep you updated about your deals.

3.4 **Better deals forecasting.**

Forecast your deals worth by setting a win probability on each sales pipeline stage.

4. Lead Scoring

Hook: Rank your leads in order. Determine their sales-readiness. Prioritize high-value leads.

4.1 **Categorize your leads.**

Identify the leads that are potentially most valuable to your company. Channel your energy into who matters most.

4.2 **Create a lead scoring system.**

Make a set of lead scoring rules so your marketing department can create better leads.

4.3 **Visually identify your leads.**

Identify hot, warm, or cold leads easily by color coding them.

5. Quotes Management

Hook: Create, submit, and track quotes and invoices without breaking a sweat.

5.1 Track and manage your quotes.

Track, monitor, and manage all the quotes you created in one platform.

5.2 Instant quotation.

Instantly create a quote that pulls through detailed information for any incoming lead.

5.3 Customize your calculation.

Configure your quotes calculations by setting a fee, tax, or discount and apply them to either individual product or on the overall costing.

5.4 Visuals help you sell.

Most customers would want to see how the actual product looks like or get a deeper understanding on what they are signing up for. You can upload multiple attachments to each product line such as documents, pictures, excel files, etc. as a proof of product.

6. Client Management

Hook: Get access to all client-related information in one platform. Perform tasks using their data in just a few clicks for maximum efficiency.

6.1 **Detailed client information for better services.**

Record your client interactions, create notes, and find all their records in one place.

6.2 **Stay up to date with the activity feed.**

Designed to get you updated with all the changes made in your clients' records.

6.3 **Organized documentation.**

Systematic documentation designed for ease-of-use.

6.4 **Know your lead source.**

Know where your leads are coming from and assess their performance, so you will know where to focus on.

7. Invoice Management

Hook: Instantly create invoices, email them to your clients, manage invoices and add comments, and more.

7.1 Ease of use

Type in any relevant data and instantly create invoices. Easy as 1-2-3.

7.2 Flexible calculation

Make automatic calculations just by configuring the invoice. No additional calculations needed.

7.3 More options for businesses

Download or print your invoices. Or even associate invoices with existing deals. So, you can do more in one platform.

7.4 Customize your invoice number.

Each company has their own rules in naming convention. Saphyte gives you the flexibility to customize your invoice number depending on your business rules.

Marketing Management

1. Email Marketing

Hook: Powerful marketing tool designed to help your business grow through email.

1.1 Track and monitor your email performance.

See the moment your emails are opened or clicked so you can follow up with your clients in time.

1.2 Create professional-looking emails with just a few clicks.

No need to build awesome emails from scratch. Saphyte has built-in email design templates at your disposal.

1.3 Email segmentation

Send content designed for a target customer segment—even to a thousand of recipients—in a few clicks.

1.4 User flexibility

Sync different emails to your workspace and decide which user's email address will be used as your sender.

1.5 Drive your email marketing with Saphyte in any of the following methods:

- Segment your contacts, filter them by categories, and send them email through the contact button.
- Create workflows for a more strategized approach.
- Send an email blast by composing an email and targeting specific recipients.

2. Drip Marketing

Hook: Re-invent your communication strategy. Create a pre-written set of content to send to customers or prospects over time using automation.

2.1 What is a drip email marketing?

Drip email marketing is a feature where you can set up delay intervals between your emails for autoresponders and marketing emails.

2.2 An email drip campaign is perfect for the following reasons:

- Building your list and turning subscribers into advocates through lead nurturing campaigns.
- Giving your sign-up rate a considerable boost.
- Lowering the risk of people unsubscribing.
- Segmenting your audience into more targeted groups based on user actions.

2.3 Aside from the obvious increase of email engagement and open rates, drip campaigns are more than what just meets the eye.

One of the greatest benefits of drip email marketing is that you can re-engage inactive prospects and customers. As we all know high quality leads are hard to come by. With a drip campaign, you can re-engage and upsell your products and services without having to find more leads along the way.

2.4 Breaking into your prospect's impact should not require an exaggerated amount of effort.

With Saphyte's drip email marketing feature, you can create campaigns to educate and nurture, re-engage, and ultimately encourage more sales. Or transform your simple welcome email series to a complex post-purchase strategy.

2.5 What can you do with a drip marketing?

Top-of-mind drips	Establish constant online presence by consistently sending emails on a scheduled basis
Educational drips	Provide your target audience with relevant and helpful information such as sales tips, etc.
Re-engagement drips	Re-engage customers who you have not been in touch with for a long time
Competitive drips	Get your competitor's customers to make the switch to your product or service
Promotional drips	Promote one of your products and services over a period
Training drips	Guide your readers through a training program, or explain new information to your customer
Announcement drips	Scheduled newsletters and announcements like feature launches, grand openings, new products, etc.
Reminder drips	Constant deals, documentation, expiry, renewal reminders
Onboarding drips	Take your customer to your onboarding process step by step

3. Campaign Management

Hook: Measure the effectiveness of your marketing efforts with our software-generated insights so you can determine which channel to continue, and which one needs a rework.

3.1 **Real-time analytics**

Get marketing campaign or email campaign analytics in real-time so you can make timely strategic decisions.

3.2 **Measure your reach.**

Associate your campaigns with your contacts and deals. Monitor the effectiveness of your marketing reach.

3.3 **Multi-channel marketing**

Manage your campaigns on different channels— email, social media, website, and more.

4. Campaign Management

Hook: Create an impact on the viewer sufficient to convince him or her to take action.

4.1 What is a landing page?

A landing page is a site that a visitor gets redirected to upon clicking on a link, a search engine search result, a promotional email, or a PPC ad. Each site on your website, including your home page, is a potential landing page. And landing pages are designed to convert visitors into leads and ultimately, into paying customers.

4.2 How do you create a landing page in Saphyte?

It is not as complex as you think. We made it easier for you as counting 1-2-3.

1. Go to Saphyte's Landing Page Builder
2. Select your template or upload your own design
3. Drag and drop placeholders and other elements to build your layout
4. Tailor your content
5. Publish your landing page

4.3 Benefits

- Ready-made templates with user-friendly interfaces available for you to work on
- Creative designs in minutes, minus the designer costs and agency timelines.
- Easy integration of Saphyte forms from your landing page to your contact database.

5. Form Builder

Hook: Create online forms with a simple drag-and-drop functionality.

5.1 Build powerful forms -- without coding them!

Building your form in Saphyte does not require you to be a tech wizard. It is simple and easy as putting legos together. Saphyte's allows you to layout your own forms the way you want it just by dragging and dropping form elements into your form builder.

5.2 Use them in your landing pages!

Saphyte's form can be integrated in your landing pages and captures the form submissions real-time straight into your Saphyte contacts database.

5.3 No designer, no problem.

With built-in form templates, you can share your forms with designs that look professional and legit!

5.4 Share links and embed functionality.

Easily share your ready-made forms by generating a share link or embed them in your website by generating an embed code in just a click.

5.5 What type of forms can you do in Saphyte's form builder?

The sky's the limit. Whatever type of web form there is imaginable -- and all is doable and possible with Saphyte's form builder!

Here are some examples of Forms that you can build in Saphyte:

- Contact Us
- Newsletter Sign Up
- Sales Contact
- Event Registration
- Customer Feedback / Survey
- Online Order and Payments
- Account Registration
- Contest Registration
- Website Visitor Feedback
- Donation
- Free Assessment / Audit
- Candidate Screening
- Job Application
- Proposal/Quotation
- IT/Helpdesk/Support Forms

6. Marketing Automation

Hook: Gain a competitive edge. Complete tasks faster at lower costs. Explore the power of automation for your business.

6.1 Engage leads quickly.

Let the software assign a sales rep to a lead automatically so you can capture them before your competitors do.

6.2 Automatic lead segmentation

Set different conditions that will automatically assign leads to a specific category, so your sales team will know what step to take first when engaging with them.

6.3 Newsletters and promotional offers

Automatically send time-sensitive updates, announcements, and marketing offers on schedule to leads and customers. No need to constantly remind yourself as the software will do it for you.

6.4 What are the good candidates for automation?

- Time-consuming tasks
- Repetitive tasks
- Tasks that can realistically be triggered by standard rules

6.5 What marketing activities can you automate with Saphyte?

- Lead Generation
- Newsletters and announcements
- Promotions
- Lead nurturing
- User onboarding
- Social media marketing
- Analytics monitoring
- Behavioral tracking
- Lead segmentation
- Cross-selling/upselling
- Retargeting

Support Management

1. Team Chat

Hook: Bring your team together and connect them in a single space.

1.1 Instant collaboration

Your teammates are just one message away. Create channels, share files, and get notified real-time.

1.2 Built-in chat system with no extra cost.

You do not need to pay for an external app to communicate with your team members. The built-in team chat is included in your plan!

1.3 Never fear of missing out.

Follow and get updated on projects, events, teams, and individual topics in their dedicated channels.

1.4 Perfect for remote work.

Create a virtual office and bring your teams from all over the world together where they can all communicate, share their ideas, and sync with other team members.

1.5 Chat securely.

Control who should be involved in your communication by setting your channels into private and sending direct messages.

2. Live Chat

Hook: Let your customers know you are instantly reachable.

2.1 **Your live chat stays connected with your workspace.**

When a customer reaches out to you via live chat, their details will automatically be captured in your workspace. No need for manual intervention!

2.2 **Engage with your customers real-time.**

Showing your customers that you have the sense of urgency to immediately tend to their concerns is highly likely that you will get satisfied customers.

2.3 **Establish trust and good impression.**

Letting your customers know you are available by displaying your live chat widget on your website helps build trust, knowing that they can connect with you immediately even if your customers do not need to talk right then and there.

2.4 **Reduce repetition for your customers.**

No one wants to have to explain the issue they are having repeatedly. You can read the information supplied by the customer while also reviewing other details they have access to in the chat history.

2.5 **Get ahead of your competitors.**

If your competitors do not offer live chat (or provide low-quality chat support), that gives you the space to do it right and earn their business.

2.6 **Easily measure your agents' KPIs.**

The built-in chat analytics lets you identify whose agent is the most productive and who is slacking. Sharing the analytics with your team can boost the competition and can motivate them to perform better.

3. Ticketing System

Hook: The faster the resolution for your customer issues, the happier your customers will be.

3.1 What is a ticketing system?

It is basically a help desk that is used to monitor and track all customer interactions in one database -- including questions, requests, feedback, and complaints.

3.2 Back-to-back communication.

Saphyte's ticketing system allows two-way communication between the customer and the agent by providing the customers the ability to comment, share files, and communicate on their tickets in a thread conversation.

3.3 Prioritize the tickets accordingly.

Know which tickets need urgent attention by categorizing them according to priority.

3.4 Automate ticket processes.

Set up workflows that will automate the assignation of your tickets to specific persons or departments based on the nature of the complaint or request.

3.5 Promote self-service to your customers.

Providing a client portal to your customers means providing them access to resources and quick links that can help your them resolve simple and repetitive issues.

4. Request Management

Hook: Choose the easier way for your customers to submit their requests to you with the Request Management system!

4.1 Know which requests to prioritize.

Define the type of requests that needs immediate attention by labeling your request types according to priority.

4.2 Appropriate your requests.

Choose to show certain types of requests to specific groups of clients by setting visibility conditions. For example, Motor Insurance Reimbursement Claims request should only be visible to Motor Insurance clients.

4.3 Provide your customers with utmost convenience.

Calling your customer hotline can be frustrating. Providing your customers a self-service portal where they can lodge their request and monitor its progress can help ease the frustration from both the customers and your help desk team.

4.4 Ease of support.

Monitor your clients' requests in one single place and track its status and progress.

5. Client Portal

Hook: The more innovative way to interact with your customers and obtain their information.

5.1 What is a client portal?

A client portal is an accessible and secure website where your customers can access using a log-in and a password. It will direct them to their profile where they can perform self-help activities such as submitting requests, uploading documentation, transferring data, etc. without needing the aid of your customer support to do so.

5.2 Why you should provide your customers with a client portal?

- **Establish trust.** Providing your customers with a portal where they can monitor their interactions with you and access quick and useful information provides them the impression that you are a reliable and technologically advanced company.
- **Geographical availability.** Your customers can be from anywhere in the world. Providing your customers the ability to connect with you wherever they are means not losing them to other local businesses.
- **Cost-effective.** With cloud technology, you do not need to worry about building local and costly server infrastructure with the risk of physical failure. You can store all your client's data in cloud and access them from anywhere.

5.3 Functionalities of Client Portal

Cloud Storage	All documents and files are stored and backed up online
Password Management	Customers have self-controlled governance on their passwords
Documentation	Upload files, documents, photos required
24/7 Support	Raise tickets and monitor their status
Self-Help Service	Submit requests without having to go through the customer support queue
Information Availability	Makes sure that announcements and new terms and conditions reach your customers on time

Saphyte Tools

1. Saphyte Scan

Hook: Business cards go digital! Growing your business leads does not have to be complicated and time-consuming.

1.1 Quick data migration

No need to manually type everything — with Saphyte's Optical Character Recognition (OCR) technology, transfer your leads' data and information from their business cards into the CRM in just seconds!

1.2 Automatic sorting of data

Saphyte's business card scanner recognizes texts in the business card — and organizes them according to name, contact number, email, company, and other important information into the CRM.

1.3 Edit as you go.

Not satisfied with the results? Finalize the contact information using the data gathered by the system and make your finishing touch with just a few taps.

1.4 Manage your leads and clients.

After scanning, tag your contacts as your lead, prospect, or client. Then let Saphyte manage this information for your sales and marketing teams — into the sales pipeline or wherever you see fit!

1.5 Mobilize your sales force.

With just one scan of a business card, your sales team can add leads and clients into your CRM whenever and wherever they are.

1.6 Quick steps to scan-and-store:

1. Download Saphyte mobile app
2. Open the business card scanner
3. Place the business card on a flat surface and point your mobile camera onto it
4. Map the details of the business card to the contact attributes
5. Save and store in your database

2. Saphyte Sync

Hook: Bid farewell to all that overtime of manually extracting data that matters to you.

2.1 What is Saphyte Sync?

Saphyte Sync is a lead capturing plugin that streamlines your lead generation efforts and makes data syncing and gathering, effective and efficient.

2.2 How does it work?

Saphyte Sync allows you to excerpt data from LinkedIn profiles of your potential customers. All you must do is install the plugin tool to your browser, search for your prospect's profile on LinkedIn, click on the Sync button, and let the tool sync the information for you in your Saphyte workspace.

2.3 Functionalities:

- Auto-capture data
- Capture multiple contacts
- Categorize your data
- Search by keyword to capture contact
- Add notes
- Light/Dark themes

2.4 How can Saphyte Sync help you in your business?

Free tool.

Get this powerful tool without even having to spend a penny for external apps! This add-on is downloadable from Chrome or Firefox store for free.

Ditch the manual work.

Say goodbye to manually transferring your LinkedIn leads into your spreadsheet. Saphyte Sync lets you be more efficient by doing the job for you where it automatically captures your LinkedIn contacts straight into your database.