Sales Demo Script

Showcasing the story of a Helmet

PreSales and Partner Enablement
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Table of Content and Checklist

Logins for demo script

Admin-user (backend)

- Purpose: *This is the business-user of the company that owns/maintain the solution*
- Username: *Administrator*
- Password: *Personal. Received in E-mail*

B2C Customer

- Purpose: *Just a general B2C customer on the bike shop to sell his goods.*
- Username: *FredBooker*
- Password: *FredBooker1*

B2B Customer

- Purpose: To show more elements of the B2B capabilities of our platform.
- Username: BikeShopAarhus
- Password: BikeShopAarhus

Sales representative

- Purpose: *The sales representative of the company that's able to impersonate his customers.*
- Username: *SalesRep*
- Password: *SalesRep1*

Preparation

Obtaining your demo solution

- *Your demo should be available at <initials>.dw.dynamicweb cms.com*
- *Requesting a demo for others? Refer to "Dynamicweb Software A S\Business - Documents_Sales Methodology\0. Sales process & Instructions\Procedure request a demo solution.pdf"*
- *Questions or problems, contact us in Presales and Partner Enablement*

Preparation

Do this procedure every time you finish a demo, and make sure it's done before you start a demo.

- *Go to the PIM > Shared Queries > Validation > 1 Check Demo Data*
- *If no products are shown, it's because they've already been deleted, so you're ready to start your demo.*
- *If there are products shown, select all, right-click and delete.*
- *Then go to Settings > Repositories > Products > Index: Products and build repository (click on each of the yellow buttons and wait until the green bars get regenerated)*
- *Go to PIM > Dashboard and confirm that the dashboard for "Newly arrived products" is set to zero*

Logging in

- *Log in as Administrator / Administrator (or password received in your e-mail as introduction to your own environment) and **not** as angel, as the import configuration will not be available if you are logged in as an angel.*

Your introduction

- *Help you and your customer understand their situation*

What we'll show

- *We'll follow the journey of five bicycle-helmet products as basis of this demo*
- *From the birth of the products in the ERP system*
- *To importing and enriching the product in our PIM*
- *To publishing it to Ecommerce*
- *Where the product will then be available for purchase*
- *And finally, we'll look at how our marketing module encourages further sale*

Why we'll show it

- *Relate the content of the demo to your customer's situation*
- *To have a "happy flow" in your demo with products you can rely on*

Importing Data

Story:

We often see that in B2B wholesales products are born in the ERP-system. Dynamicweb connects out-of-the-box with the four largest ERP systems from Microsoft: Business Central (BC), Finance and Operations (F&O), Axapta (AX) and Navision (Nav). In this demo we simulate an import from the ERP system, where the product is born.
The product owner will enter the product in ERP because a sales and purchase price are given in ERP. But also possible are the length, width, and height for the Warehouse Management System. Dynamicweb is receiving all this information from the ERP system via the connector. Once in Dynamicweb, you can start with the enrichment process using the PIM module.

Simulate import from ERP

- *Go to settings > integration > data integration*
- *Click on play button for the data-integration activity "Import from ERP"*
- *Explain that this process is simulation what is usually a scheduled batch integration*
- *Use the opportunity to speak to our standard integrations and how that puts us in an excellent position for customizing integrations where necessary. Dynamicweb sweetspot is Microsoft ERP like Business Central, Finance and operations, NAV, and AX. But we can connect with a lot of others.*
- *Note, in most cases, stock and price are retrieved via a live integration, as opposed to this recreation of a batch import*

PIM

Dashboard

Dashboard and workflow concept

- *Go to PIM dashboard*
- *Point out the newly arrived products (21 new products, colored Green)*
- *Introduce concept of workflow and "Level of Completeness"*

Product journey

Getting your product ready for sale

- *Now your products have been born, and they've been brought into PIM*
- *Because of your import settings, you'll see them in your warehouse*
- *But now you need to get an overview of the products in your warehouse*
- *And bring them to your storefront as a webshop*
- *And any other channels that may be relevant for you*

Warehouses and channels

- *Show warehouse structure and our star product*
- *PIM > Warehouses > Accessories > Helmets > Mitro UE-1 … Black/Grey*
- *Explain that the structure here is for setup the data structure and inheritance*
- *But that validating your product data, to make sure a product is ready for sale, requires a workflow*
- *The goal is to publish to the webshop, and perhaps other channels*
- *Explain concept of channel*

Workflows and Completion Rules

Story:

Different departments within the company are responsible for the enrichment process. By working with workflows and level of completeness, you create an overview for colleagues and make them responsible for a part of the enrichment process. This way they only see their attribute fields which they must fill and their status. Nothing else.

Workflows

- *Go back to dashboard*
- *Do a proper explanation of the workflows*
- *Click on "Newly arrived products"*
- *Point out that we're now in the first stage of the workflow*
- *Note: Almost every Workflow has content in it to showcase the different levels of completeness / Fields belonging by the workflow*

Completion Rules

- *Point out completeness, click on the button and show that it's only related to this stage in the workflow*
- *Explain that these core values come from the ERP, so if they are not filled out, they need to be filled out in the ERP*
- *Go into the product details of our star product "Mitro UE-1 … Black/Grey"*
- *Show that the fields visible here are those relevant for this workflow state and point out the workflow state*
- *Note: to check whether the correct values are in the field, field validations can be added based on Regex*

Enrichment

Story:

During the enrichment process you add all the information about the products. You ensure that everything you know about a product is included in the PIM. This is not only information that you want to show to the buyers, but also product information that you need internally. It's important that the PIM is your single-source-of-truth without searching in the company for additional information.

Enriching through further import

- *You can enrich your data in one of three ways*
- *ERP import (as we've seen),*
- *manually, or*
- *through import from other sources of data*
- *We'll now import a file with some additional product information*
- *Note, additional information is for just 5 products in this example*
- *Note, additional information includes Short_Description, Long_Description, META_Title, META_Keywords and META_Description.*
- *From the PIM dashboard, click on "WF1 – Newly arrived products (From ERP)"*
- *In the ribbon, click on "Import products"*
- *Choose the source file "Info from Supplier.xlsx"*
- *Click next*
- *Choose "Info from supplier mappings" for import configuration*
- *Click next*
- *Notice settings w/ data preview, no changes needed*
- *Click next*
- *Notice mapping*
- *Click run*

- *Go to “WF7 – Ready for Publishing”, show that the 5 products with additional information are now Yellow – 70%*

Translation

Story:

Product data is often created in multiple languages. In the PIM system you can work with predefined fields, such as color. You can translate this in the settings. But the more dynamic content will have to be translated manually. Dynamicweb PIM ensure that your content goed through, for example Google translate. The first translation is done by a computer!

Translate your products with Google Translate

- *Note: This is a side-step of the general Helmet-Journey. You can show this, but it isn’t mandatory to show.*
- *Show detail of one of the products with a second language to see side-by-side editing*
- *Go back to the list view*
- *Select all*
- *Go to grid edit*
- *Select the flags in the ribbon, so all languages are chosen*
- *In the name heading, click the hamburger menu and choose “Translate”*
- *Choose the languages to translate to and hit run*
- *It is a head start for translation, not for final content*
- *Go back to the grid edit of the product, and show the translations*
- *Push Cancel to keep the products “clean” for the next demo*

Inheritance

Story:

Because some data is the same for every product and you want to ensure that the product data remains consistent, Dynamicweb PIM uses data inheritance. This allows you to add information at group level. Take as example brand information. That’s for every product exact the same information. To add this information to the group and assign products to the group, all products will receive this information automatically. In this way, the quality of your product data will increase further.

- *Still in WF7, show audience that we’re still missing information (Brand information)*
- *Select the products*
- *Click on “Add to group” in ribbon*
  *Choose group “_Additional information > Brands > *Merida”*
- *Explain that products can belong to several groups, and that you can inherit category specific fields, and that they can also be filled in at the level of groups and subgroups, which is the case here*
  Point out that completeness is now at 90%
- *Note: In the “scheduled tasks” you can execute this action automatically by using the “1. Assign products to Manufacturers Group” job*

Assets

Story:

In addition to storing product information, you also add various assets in the PIM system. For example, product images, manuals and inspiring video's. Of course, you want to put all these assets in your PIM system, connected to the right product, without adding a lot of them manually. Therefor Dynamicweb knows an automatic check-in of the assets. Based on a filename, the product will be recognized and added to the correct product. We show you how.

- *Show that completion is not yet 100%*
- *Images can be selected manually*
- *But we also have auto check in assets,*
  automatically assigning based on Product Fields. In our example based on product number
- *Go to settings > scheduled tasks > 2. Auto check-in asset and run now*
- *Go back to WF7 – Ready for Publishing*
- *Show example "MITRO UE-1 eBike, City, Urban, Trekking Black/Grey"*
- *Go to assets area, click on wrench*
- *Show the different image assets and explain the tool*
- *Explain default image, perhaps change the default image*
- *Add some assets to different categories by selecting an image with the checkbox a clicking "Assign to asset category" in the menu at the top of the pop-over window*
- *Save and close the assets window*
- *Save and close the product*

Distribution

Story:

After enriching the information, you want to use the data in different places. This can be on your own webshop, but also to marketplaces. Important here is that the data is always the same and that you can publish consistently. By creating a channel, users can choose exactly which structure this channel has. Then a feed is created in which you define which fields are sent to that feed.

Channels and Dynamicweb webshops

- *Explain concept of channels and how Dynamicweb ecommerce webshop is one of the many possible channels*

Publish to channels

- *Select products that are now 100% in the last step of the workflow, WF7*
- *Select "Publish to channels" in the ribbon*
- *Publish to webshop bikes > accessories > helmets*
- *Go back to the frontend, and show the newly published products in the list and show the detail of the start-of-the-show product, Mitro UE-1 … Black/Grey*

Introduction of Swift Framework

Story:

The Dynamicweb Swift framework is a framework that allows you to get online quickly with a fast, good-looking website. Dynamicweb Swift is free to use with deployments. But one can also have their own template developed or put up a headless website that works on the Dynamicweb platform.

- *Explain that the Swift demo site is both a demo and a blueprint for quickly creating new sites*
- *Explain that Swift is a modern frontend framework that enables users to build pages and content without the need of coding – as was the case not many years ago (HTML, CSS)*
- *Explain that Swift is Google Lighthouse Green. Users start with a solid foundation on which they can build further.*
- *Show the standard elements of the website like:*
    - *Different rows and columns*
    - *Product List Page and Facet Search*
    - *Product Detail Pages*
    - *No prices when not logged in and after login customer specific pricing*
- *Show the helmets in Products -> Accessories -> Helmets*

Customer Experience

Order flow

- *Continue in the frontend*
- *Add the new product to the cart*
- *Sign in as FredBooker /FredBooker1*
- *Show the full flow from "Product selection" to "shopping cart" and "checkout"*
- *Place order*

(Integrated) Customer Center

- *Show the order in the customer center*
- *Go back to the backend, Ecommerce > Orders > Bikes*
- *Show the new order, and point out the options you have here for further processing*
- *Mention that handling orders can differ from company to company based on their ERP setup*

Sales representative with Impersonation functionality

- *Continue in the frontend*
- *Sign in as SalesRep / SalesRep1*
- *Company employees can also log into the website and then login on behalf of an account to place orders, and do exactly what the customer can. This allows orders to be handled directly while the salesperson is with the customer and works with his specific prices/assortments/stock.*
- *Go into the My-environment*
- *You've seen two additional lines: My Customer Orders and My Customers*

Content

How to maintain your website

- *Go in the admin-panel to Content*
- *Explain that you can maintain multiple websites in one admin-panel*
- *Show Visual Editor*
- *Story: Visual Editor is a modern way of maintaining your website, based on rows and columns.*
- *Explain how to maintain your website.*

Email Marketing

Basics of email marketing

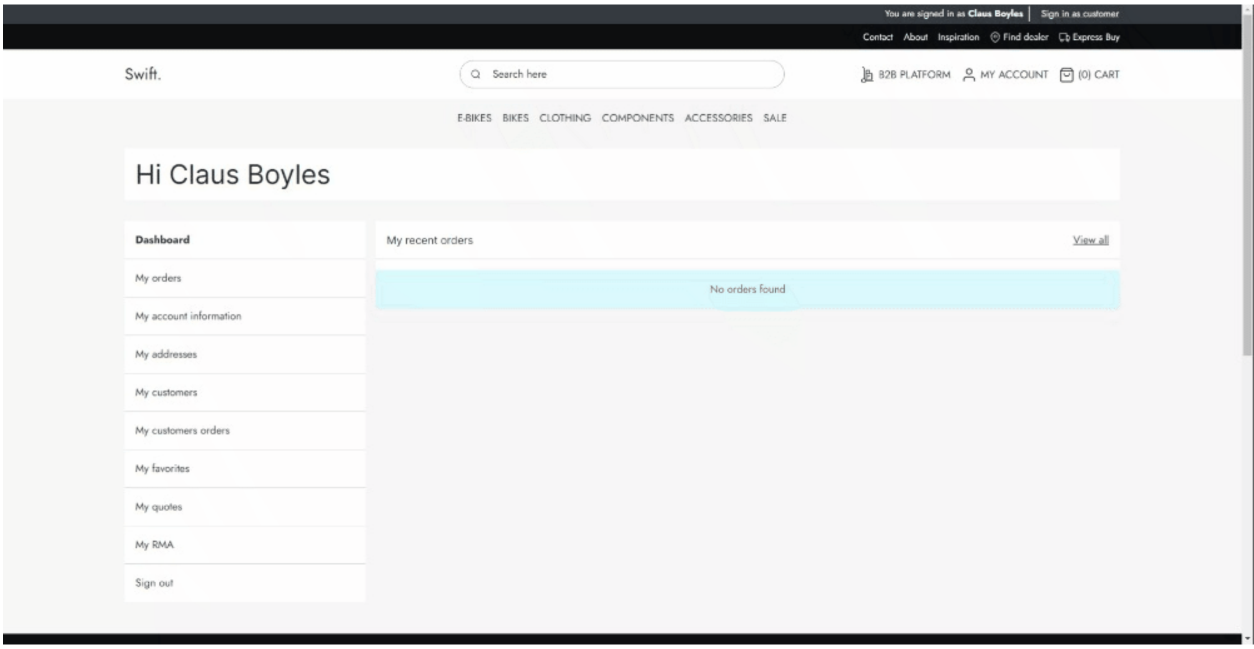
- *Go to the Marketing > Email Marketing > Campaigns > Bought Bike… > Drafts*
- *Edit content, point out that we've moved to the content area*
- *Go to Visual Editor, scroll down to helmets section*
- *Hover over the column inside the row, click the pencil icon*
- *Add your new helmets and show how they come into your preview in Visual Editor'*
- *Close Visual Editor and go back to Marketing > Campaigns > Bought Bike… > Drafts*
- *Point out in your list of recipients includes the group "Bought MTB, didn't buy a helmet"*
- *Go to Marketing > Email Marketing > Smart searches and right click on "Bought MTB…" choosing edit*
- *Explain smart searches based on user behavior*

Closing

- *Finish your meeting*
- *Remember to reset your demo (preparation steps above)*

Additional features

Impersonation



Story:

Account management travels to customers to talk about all products. Because Account Management can log in on behalf of the customer, they see the customers prices and assortment immediately and can enter an order into the system on behalf of the customer.

Impersonate BikeShopAarhus

- *Go to login page*
- *Login with Salesrep / Salesrep1*
- *Go to Customer Center and show “My Customers / My Customer Orders”*
- *Note: My customers are all the customers that these account manager can represent, My Customer Orders are all the orders that he add on behalf of his customer*
- *Search in “My Customers” for BikeShopAarhus and push: “Manage Customer”*
- *You see that Clothing is missing in the category, because BikeShopAarhus can’t purchase Clothings from the website.*
- *He can do all the thinks on behalf of the customer*

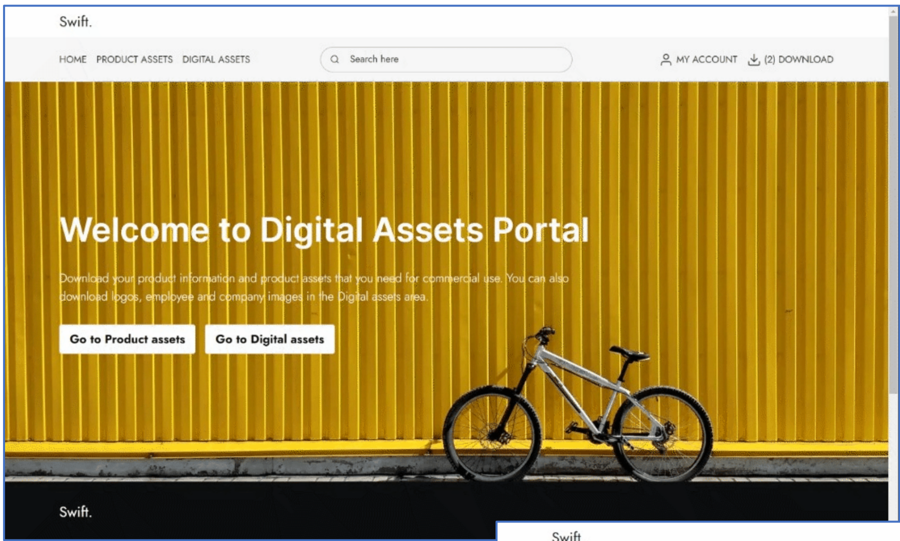
Digital Asset Portal

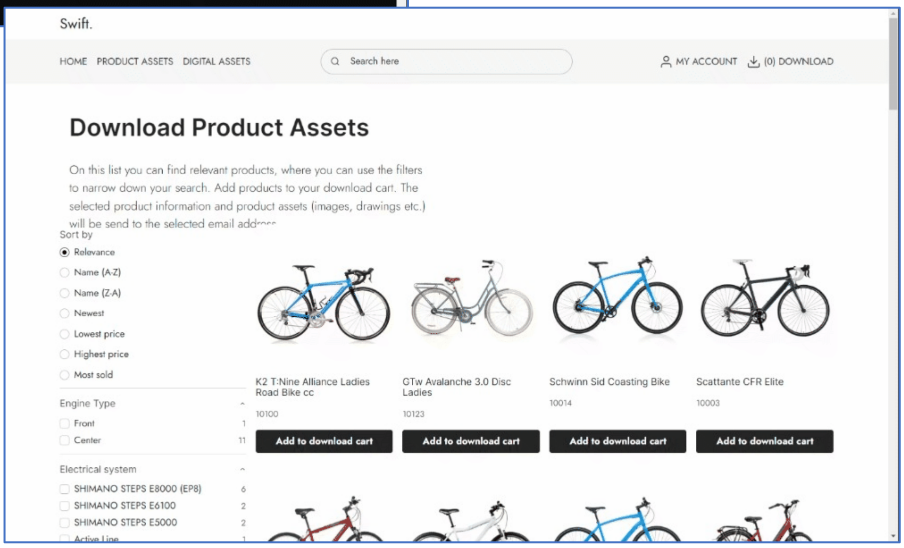
Story

If you keep a lot of data on your products, you also want to share this info with your resellers/sales channel. The more data they have, the better your products sell as well. But you don't want to manually ship everything to your customers. That can be very time consuming, and you want to be able to focus on the business. Therefore, at the front end of the PIM, we have a Digital Asset Portal. This allows your customers to access all product information in their own time. They can choose which kind of product information they want to download.

Digital Asset Portal

- *Go to <your DW-url>/dap*
- *Explain the story around the Digital Asset Portal. What's the biggest benefit of working with the DAP*
- *You can login with BikeShopAarhus / BikeShopAarhus1*
- ***Digital Assets** are the general assets that a company wants to share. That could be either CVI materials or general pictures that their customer can use on their websites.*
- ***Product Assets** goes about the assets of products.*
- *Go to "Product Assets"*
- *This page looks like a Product List Page with "facet search" to filter for your products.*
- *With "add to download cart" your customer can add this product into his download cart*
- *Click on: (0) DOWNLOAD to download the product information*





List of Edit

Date	Version	Who	What
September 2022	V1	JBE	First version