



# White Cup CRM + BI Elite Managed Services

The easiest path to ROI.

Elite Subscription is an option for customers who want to outsource all administrative aspects of the software platform. This package helps customers with the technical aspects of managing our software, keeping the platform current in supporting your business needs both today and in the future, and perform routine administrative functions (creating dashboards, adding workflows, updating forms, creating lists for marketing strategies and more). An Elite Subscription will enable you to best optimize your company resources without needing to invest in the ongoing management and configuration of the platform.

## About White Cup

White Cup offers data-driven selling technology that makes selling smarter, faster, and easier for distributors. White Cup's industry-specific CRM, Business Intelligence (BI), and Pricing products drive revenue, improve profits, and reduce overall costs. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.

To learn more about how the White Cup team can help managing your White Cup software easier, email [managedservices@whitecupsolutions.com](mailto:managedservices@whitecupsolutions.com)



Visit [whitecupsolutions.com](https://whitecupsolutions.com) to learn more.

## The following services are offered for scheduled service:

### User Management

Changes to users to maintain accurate database access

- » Addition and setup of new employees
- » Removal or deauthorization of former employees
- » User permissions, roles, groups, permissions, and access rules
- » General management of settings found under the administrative section for user management

### Data Imports/Maintenance

Create new contacts, products, and accounts with your provided lists and set it up in a workable format

### Creation of Lists

Populate data from White Cup CRM into lists to easily execute your marketing efforts

- » Filter data into specific lists and save for easy loading of data
- » Lists can be used in workflows, marketing and more

### Marketing

Initiate and manage short-term or long-term campaigns

- » Create new campaigns
- » Setup email templates specific to the campaign<sup>2</sup>
- » Manage Campaigns
- » Create A/B Campaigns
- » Import marketing campaigns for users to follow up

### Templates

Making easy-to-use templates for all the users to access

- » Building out email templates for streamlined look for customer communications<sup>2</sup>
- » Structured format for all quotes from White Cup CRM

### Workflows and Processes

Creation of automated workflow actions and processes

- » Creating custom lead qualification processes
- » Sales process to easily view the status of opportunities in the sales funnel
- » Build out workflows to automate tasks for higher task efficiencies
- » Enhance the user experience by automating simple processes
- » Modify existing workflows or processes to fit the business goals

### Advanced Feature Setup & Maintenance

- » Cross training to build administrative knowledge as needed
- » Monthly health check maintenance (includes merge of duplicated items using the system toolset)
- » Best practice suggestions for better utilization

### Custom Modifications

Changes to the backend data pulling into the White Cup BI cubes for enhanced reporting needs<sup>1</sup>

- » Four modifications per year (adding detail records, adding columns) including creating a custom column for custom calculations and miscellaneous cube modifications
- » Eight drilldown additions per year

### Enhanced Yearly Personal Training and Consulting

Keeping you in the know to get the best ROI on your White Cup BI solution

- » One 1-hour user training session (topic of your choosing)
- » One 1-hour administrative training session (topic of your choosing or refresher course)
- » Quarterly consulting sessions (1-hour each) to review of your current system and best practice suggestions for better utilization, and educate you on roadmap and new available features

### White Cup BI Reports

- » Updates to existing reports (adjusting columns, filters, etc.)<sup>1</sup>
- » Adding new columns or filters as needed
- » Create new reports annually<sup>1</sup>
- » Report emailing or sharing of reports to users
- » Schedule reports/modify as needed

### White Cup BI Dashboards

- » Modification of existing dashboards
- » Create new dashboards annually<sup>1</sup>
- » Assist with user dashboard permissions as needed

### Miscellaneous Services & Admin Duties

Extra time to be allotted to any of the aforementioned tasks, job management, or data notifications.

- » Setting up alerts for when nightly jobs are successful or not successful
- » Monitor alerts for successful or not successful nightly jobs
- » User maintenance and template updates
- » Adding report/dashboard libraries and setting access

<sup>1</sup> Miscellaneous Services are restricted to Administrative Services and are not eligible to include project work that would normally fall under a separate service or that would be completed as a one-time paid project such as custom setups and implementation work.

<sup>2</sup> Customer must provide content for all templates and marketing emails.

