

# Rule

## – Light CRM Built for SaaS

### Background

Many small and midsize SaaS companies don't have a dedicated CRM system. Yet, they still need to:

- Store essential customer data (name, email, subscriptions data and levels)
- Send receipts and transactional communication automatically
- Keep in touch with customers in an organized way

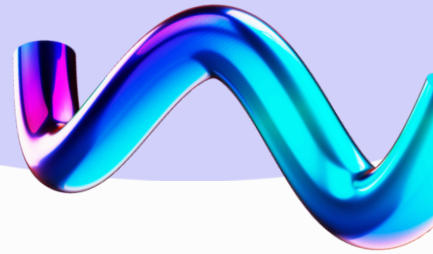
However, these businesses often lack the budget or technical resources to implement a full-scale CRM system.

### Solution: Rule as a Built-In “Light CRM”

Through an integration with Rule, you get access to a simple, easy-to-use customer management tool – directly inside your business system.

Setup:

- ✔ Rule acts as a cloud-based mini CRM running in the backend.
- ✔ The customer doesn't need to install or configure anything – the feature comes pre-enabled.
- ✔ For example, they could get unlimited contacts and 1,000 emails per month for free.
- ✔ As the business grows, they can easily upgrade to Rule Professional to handle more contacts or advanced automation.

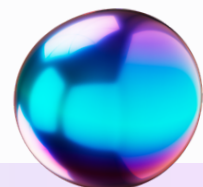


### How the Integration Works

When a customer is registered:

1. Customer data (name, email, purchase amount, date, store) is automatically sent to Rule
2. The information is stored in Rule's contact database – acting as a lightweight CRM
3. Rule then automatically handles:
  - Transactional emails (receipts, order confirmations)
  - Automate onboarding flows and customer status
  - Marketing communications and automations emails

Everything works behind the scenes, but you can also log into Rule for more advanced capabilities.



# Rule

## – Light CRM Built for SaaS

### What you can do with Rule:

#### 1. Store and Manage Customer Data

- All customer details are automatically stored in Rule
- Customer can view history, purchases, and contact information
- They can tag or segment customers (e.g., “Winback,” “Onboarding,” “Engaged contacts”, “Lojality Anniversary”)

Benefit: A simple CRM without extra cost or complexity.

#### 2. Send Automatic Receipts and Notifications

- When a purchase is made, Rule automatically sends:
  - Email receipts
  - Order confirmations
  - Thank-you messages

Benefit: A more professional experience for the customer and less manual work.

#### 3. Manage Customer Club & Membership Levels

- Membership levels (e.g., High Value Client, Enterprise User, Reseller Partner) are stored in Rule.
- Automation examples:
  - “Upgrade candidate”
  - “Paid user”
  - “Marketing qualified lead”

Benefit: Builds loyalty without needing a separate loyalty platform.

#### 4. Send Simple Marketing Campaigns

Even with the free plan, you can:

- Send newsletters or promotional emails to customers
- Track open rates and clicks

Benefit: Quick, personalized marketing without the need of a separate tool.

#### 5. Grow as the Business Expands

When the you want to:

- Send more emails
- Manage more contacts
- Set up advanced automation (e.g., Nurture leads, Reduce churn, Retention Campaigns)

...you can easily upgrade your plan anytime that fits you best.

Benefit: A scalable ecosystem – start small and grow with Rule.

# Rule

## – Light CRM Built for SaaS

### Benefits for your Customers

#### Benefits

- Simple customer management
- Affordable CRM solution
- Automated receipts & emails
- Build loyalty
- Scalable

#### What It Means

- Data is automatically stored from your business systems transactions
- Free up to a certain level, no IT project required
- Professional customer communication from your business system
- Measure and optimize performance levels and send customer messages
- Option to upgrade marketing automation capabilities in Rule

### Benefits for a POS Provider

- Adds extra value to the process - Business System + CRM in one.
- Increases customer retention by offering built-in functionality.
- Differentiates from competitors through native customer data handling.
- Creates potential for revenue sharing as customers upgrade their Rule plans.

### Summary

Business System + Rule = A complete mini-CRM solution for SaaS Companies who want to store customer data, reduce churn, and communicate professionally – without additional cost or technical setup.