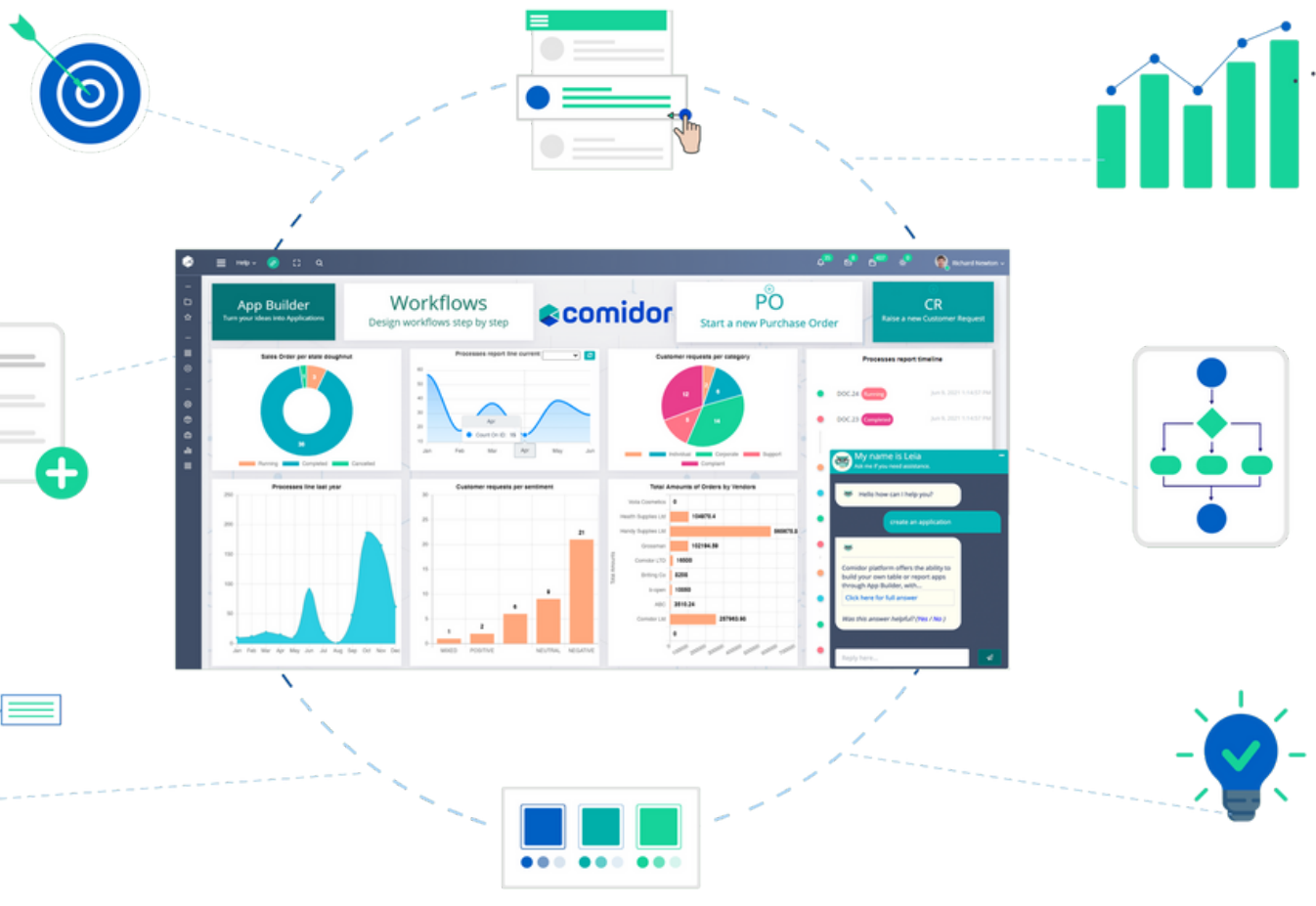




# COMIDOR v6.2

## PRODUCT RELEASE NOTES

AUGUST 2022



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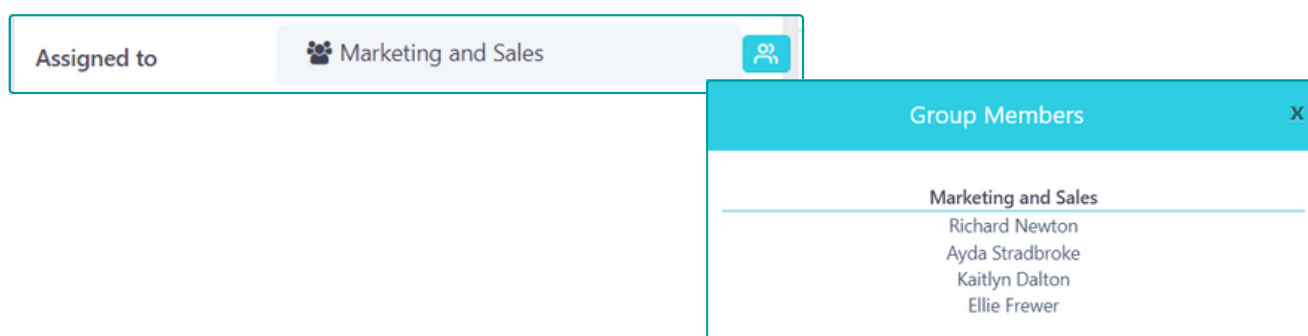
# DIGITALWORKPLACE

## UI/UX ENHANCEMENTS

In our latest versions, we introduced a brand-new User Interface so that Comidor users enjoy seamless usage and optimized user experience. Over the last months, we have been working hard to make Comidor, even more efficient and enjoyable to use. In version 6.2, we decided to go even deeper and identify parts that still had room for improvement. We managed to make the platform more intuitive and convenient for the end-users.

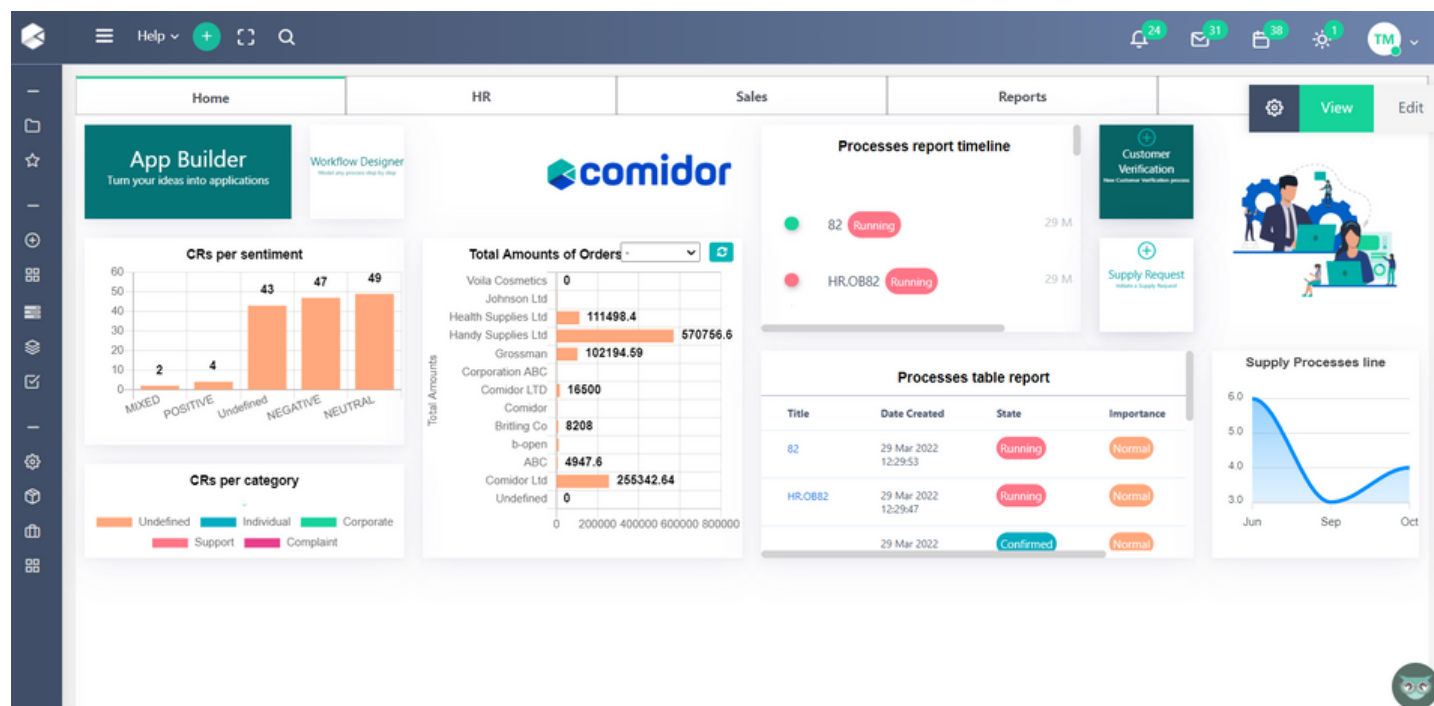
From a UX/UI perspective, we proceeded with the following improvements:

- ✓ When you abort the addition of a new dashboard tile, the existing ones that were moved initially to create space for the new tile, return to their original place, avoiding thus any misalignment issues.
- ✓ In the workflow tasks' table, the width of the columns "Scheduled duration" and "Duration" is reduced in order to avoid horizontal scrolling.
- ✓ Any filters applied in a process summary table are maintained after logout /login to save you time from unnecessary, duplicate work.
- ✓ The tasks' table is auto-refreshed when you change the state of a task from the multi-select checkbox.
- ✓ The time field in calendars (for example in task creation) now shows 24-hour time, instead of AM or PM, to give you a clearer view of the time.
- ✓ Do you want, for example, to show Tuesday as the starting day in the date field calendar when you start a task? Now, you have the option! Determine the starting day of all date field calendars, on your user settings.
- ✓ Can't recall which members belong to a group involved in a process? Click on the new Group icon to check all participants of the respective group in the "assigned to" field of tasks and processes.



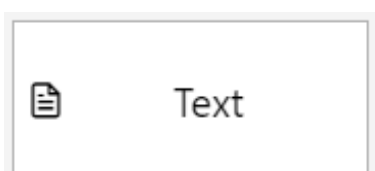
# HOME DASHBOARD

Comidor Home Dashboard has been enhanced with two brand-new features that are released in v6.2. Let's look at them in more detail.



These new features have been created to make your experience with Comidor Home Dashboard unique.

## ☒ Text Tile



Need customized statements on your dashboard? Add a Text tile to display a specific text.

Enter information for the text element
X

Title
Welcome to this customized home dashboard!

Text

Background Color

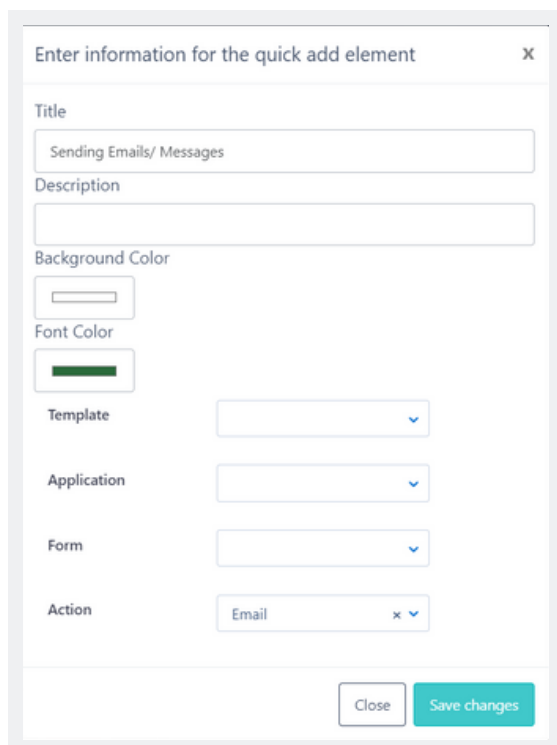
Font Color

Close Save changes

## Quick Add Tile for Messages and Emails

So far, the Quick add tile was used for creating shortcuts to trigger processes from templates and applications.

In Comidor v6.2, you can add a quick add tile to the home dashboard for sending messages and emails, too. Open the mail body directly and send external emails or messages to contacts or colleagues faster than ever before.

**1**

Enter information for the quick add element

Title  
Sending Emails/ Messages

Description

Background Color

Font Color

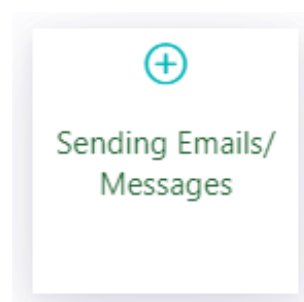
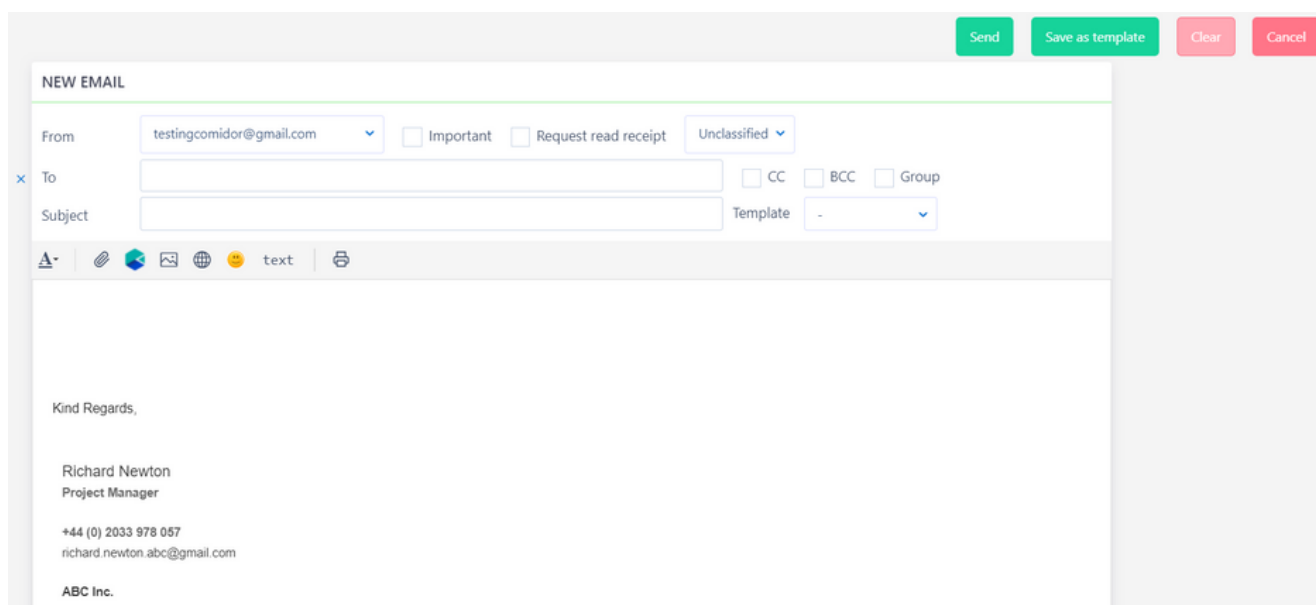
Template

Application

Form

Action  
Email

Close Save changes

**2****3**

NEW EMAIL

From: testingcomidor@gmail.com ☐ Important ☐ Request read receipt

To:  ☐ CC ☐ BCC ☐ Group

Subject:  Template: -

Kind Regards,

Richard Newton  
Project Manager

+44 (0) 2033 978 057  
richard.newton.abc@gmail.com

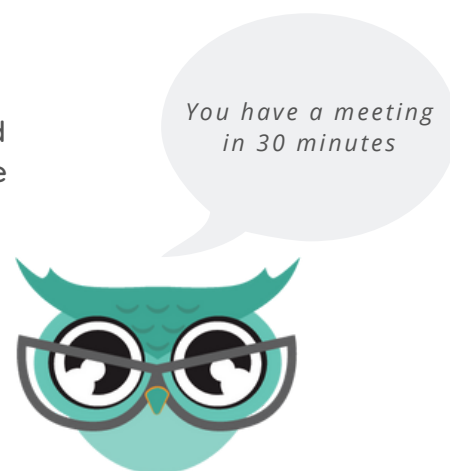
ABC Inc.

Send Save as template Clear Cancel

## LEIA THE CHATBOT

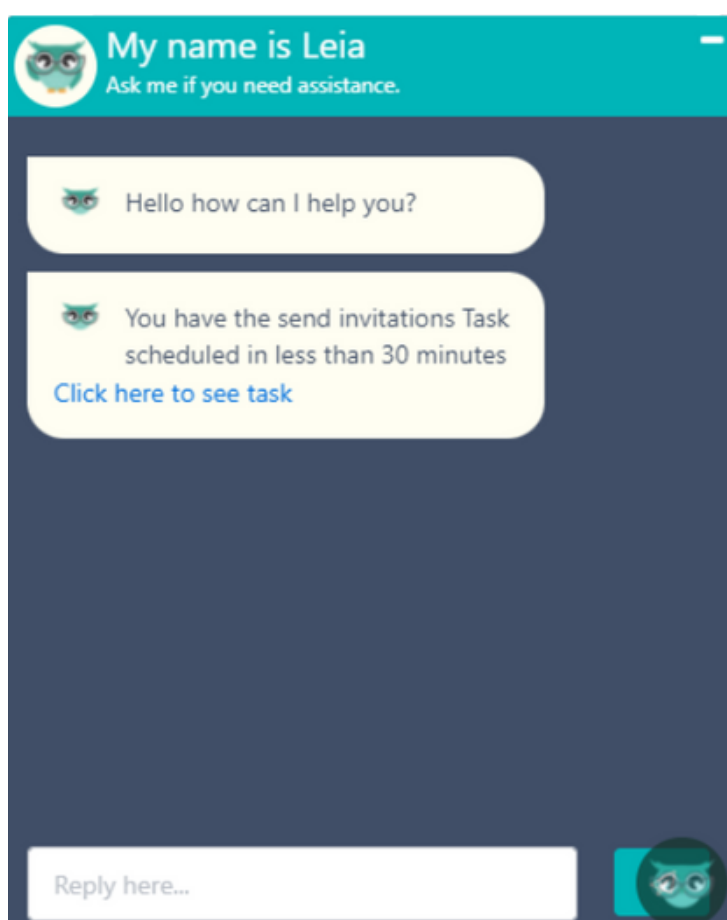
Leia, Comidor's intelligent virtual agent, was introduced in our previous version releases but capabilities have been strengthened even more in v6.2.

- ✓ You don't want to miss any of your important upcoming meetings or activities, do you? Leia alerts you about your upcoming tasks.



Leia frequently checks and alerts you to the tasks that are scheduled in the next 30 minutes. You receive a pop-up alert with the scheduled tasks in Leia's chat.

Leia's reminder includes the title of the upcoming task and a link to open the task in full view.



## POLLS

We are excited that we have created a new unit, **Polls**, to help you conduct polls and collect live responses.

You can now create polls, in order to collect live responses to questions, and display results in real-time.

1. Choose a deadline date to accept votes.
2. Define the participants of the poll, one or multiple questions, and their answer options.
3. The participants receive an automated notification. Each voter can add/change the vote until the deadline is met. After that, no changes are allowed.

**New features poll**

**Ownership**

|            |                      |
|------------|----------------------|
| Created on | 24 Mar 2022 13:15:33 |
| Created by | Thomas Monson        |
| Updated on | 24 Mar 2022 13:22:09 |
| Updated by | Thomas Monson        |

**Summary** | **Report**

**Poll Info**

**Poll Title**: New features poll

**Participants of the Poll**: Everyone

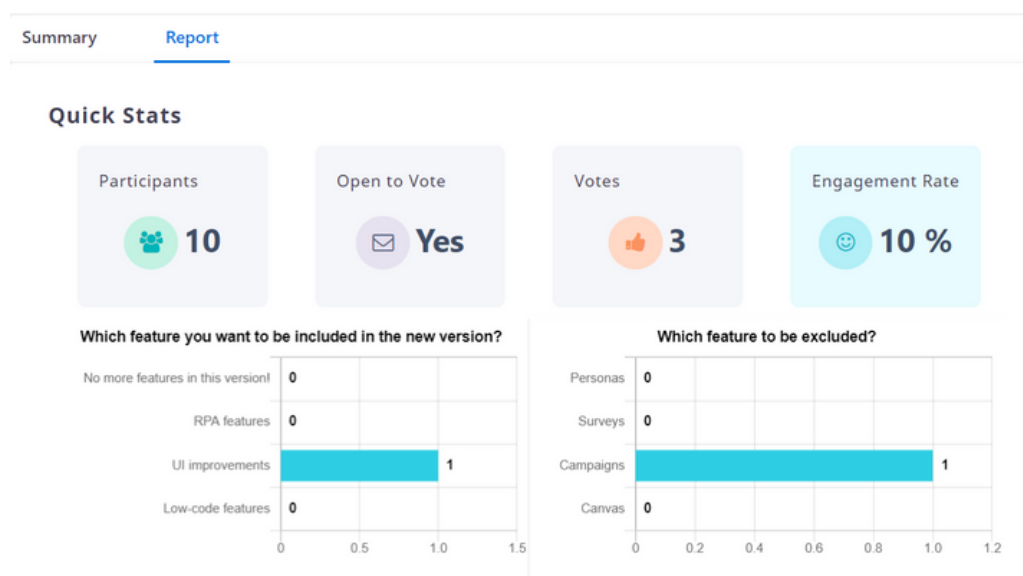
**Deadline Date**: 31 Mar 2022

**Anonymity of Answers**: ☐ **Vote**

**Questions** +

| Question Description                                      | Answers   | Actions   |
|---|---|---|
| Which feature you want to be included in the new version? | No more features in this version!<br>RPA features<br>UI improvements<br>Low-code features | [Edit] [Delete]<br>[Edit] [Add]<br>[Edit] [Add]<br>[Edit] [Add] |

4. A report of the poll is produced automatically. Widgets and statistics allow you to get a crystal clear view of your poll outcome.

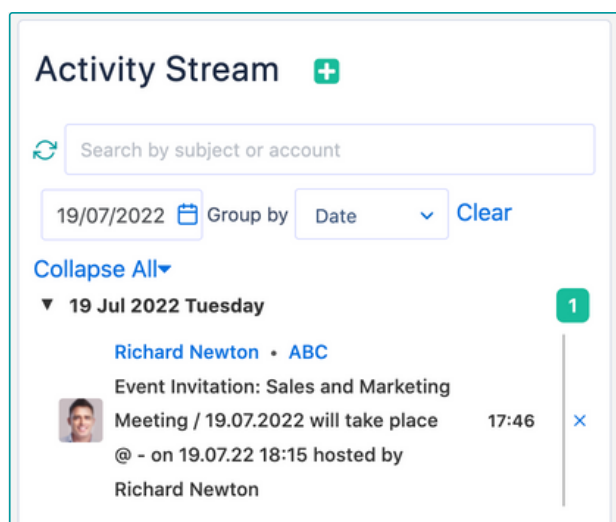
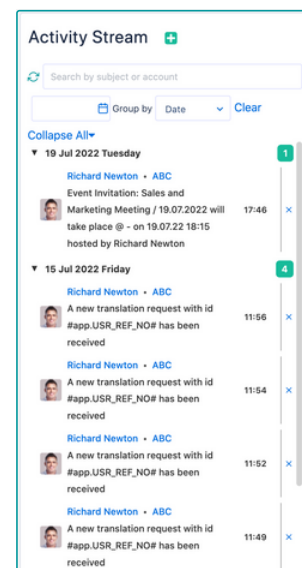


## OTHER WORKPLACE IMPROVEMENTS

### ☑ Expand/Collapse all Activity Stream Records in Workbench

A new feature is introduced in Comidor v6.2 to make your experience even more outstanding and save you valuable time. Now, you can expand or collapse all the records in the Activity Stream in Workbench, instead of expanding each group of records one by one.

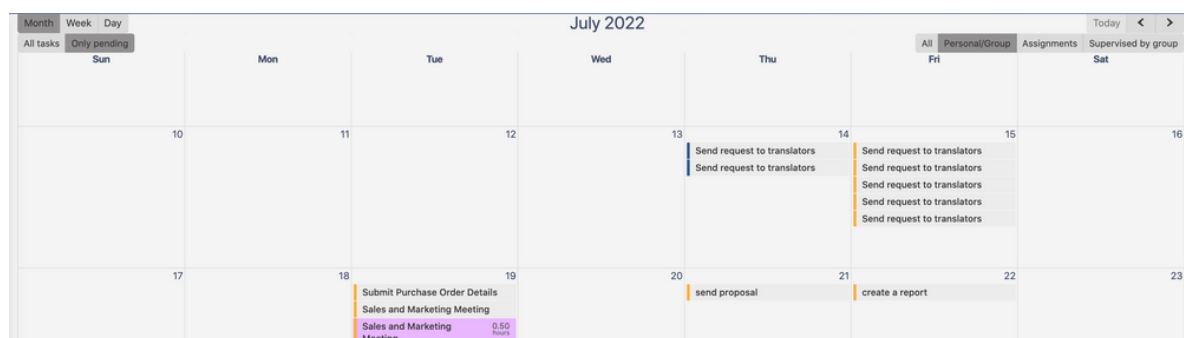
### ☑ Clear Date Filter in Activity Stream (Workbench)



So far, you could set a date filter to the Activity Stream and view only the records created on this specific date. In Comidor v6.2, we added the option to clear the date filter you set and see all the records, regardless of the date. Just click on "Clear".

### ☑ Sticky headers in Calendar

With this new feature, while navigating Comidor calendar in a daily or monthly view, the headers regarding view mode based on time period, status, or accountability remain sticky on the top of the calendar. In this way, when scrolling down, you constantly see your pre-selected view of the calendar.



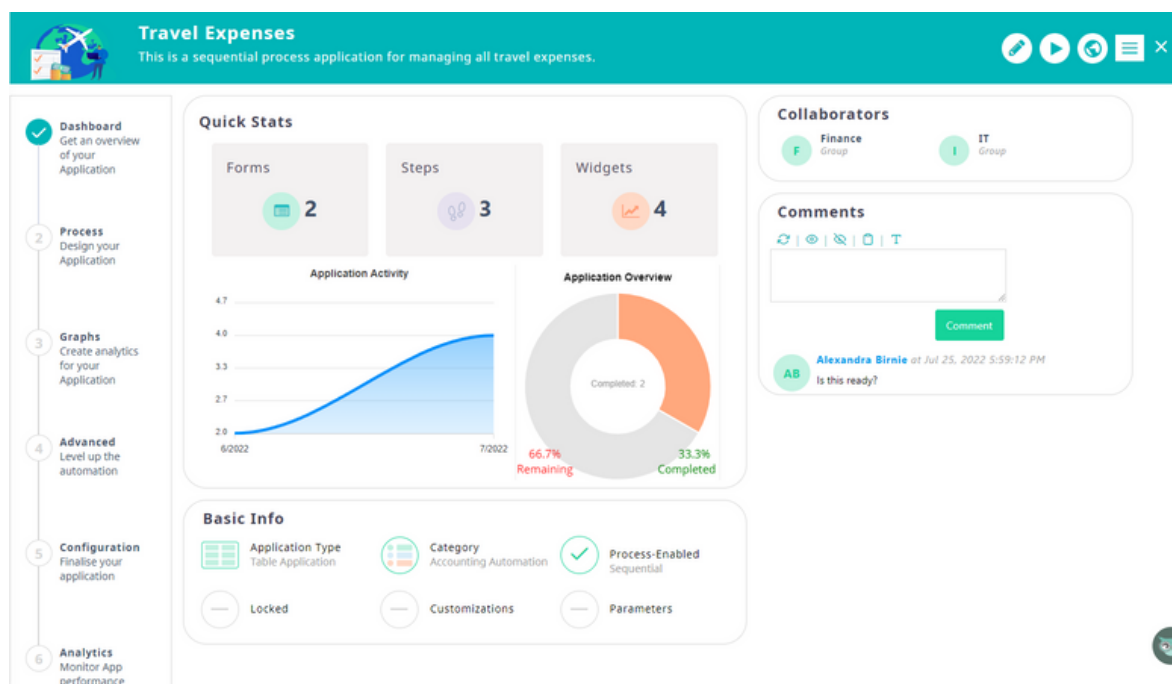


# APP DESIGNER

## NEW REDESIGNED APP BUILDER

In the previous versions, users were able to turn their idea into an application through 10 simple steps.

Now the app builder has a new look and a new name, **App Designer**! The interface has got a major update, introducing a revamped application overview, with fewer steps, and more powerful functionalities.



Comidor v6.2 has a brand new user interface where you can access all your existing applications. Every app includes a relevant graphic so that you quickly find the app you are looking for.

In addition to the design changes, now users are able to filter applications by:

- **Type** (simple, sequential, report, etc),
- **Status** (pending publish, or published), or
- **Category**.

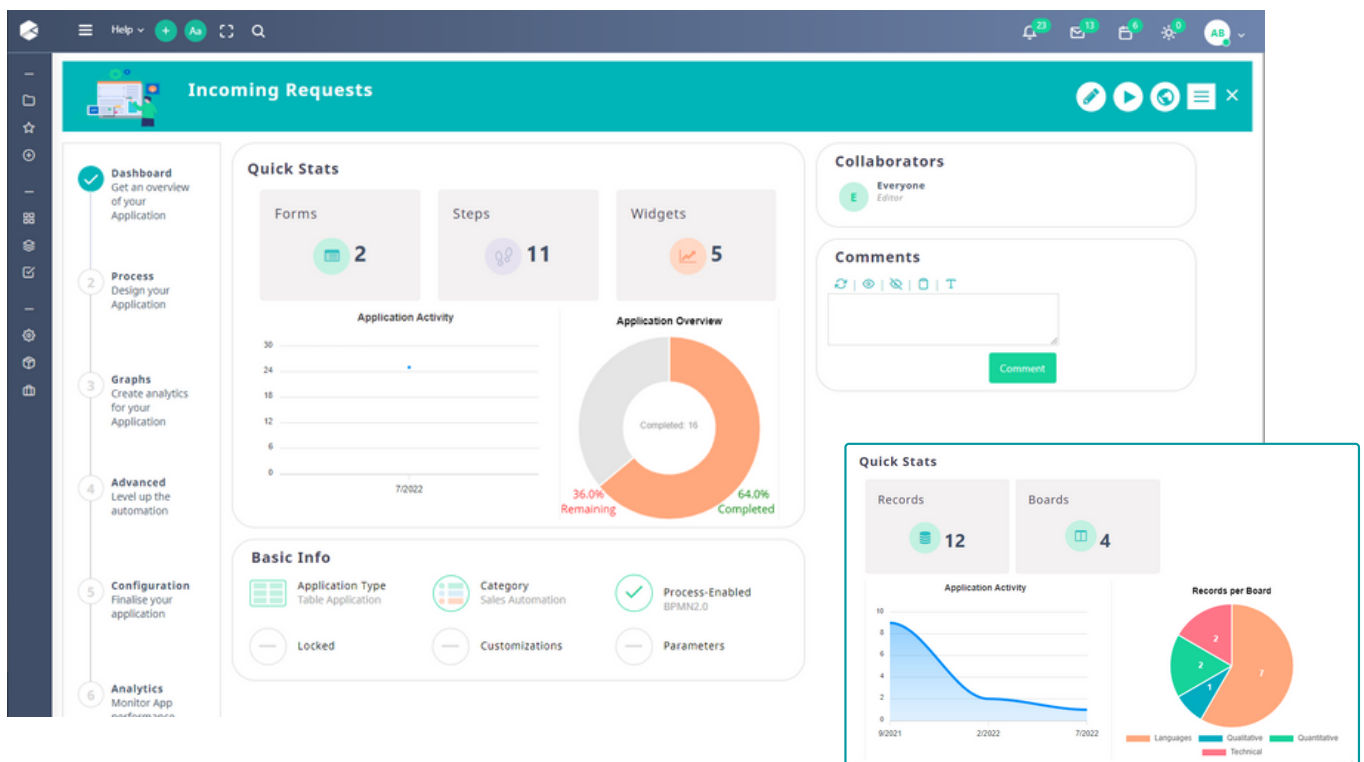
You can import an app, or start your app from scratch.

There are various types of applications provided in Comidor App Designer. You can choose the one that fits better your needs from the following options:

- **Sequential apps** for simple processes with only sequential tasks.
- **Workflow apps** for more complex processes, with loops, and automation steps.
- **Simple apps** to create a table of data-driven records.
- **Report applications** for real-time insights of Comidor Apps.
- **Kanban applications** to create Kanban boards and visualize simple records.

## APP DASHBOARD

With the brand-new summary dashboard, get a quick, at-a-glance overview of an application's basic information and activity.



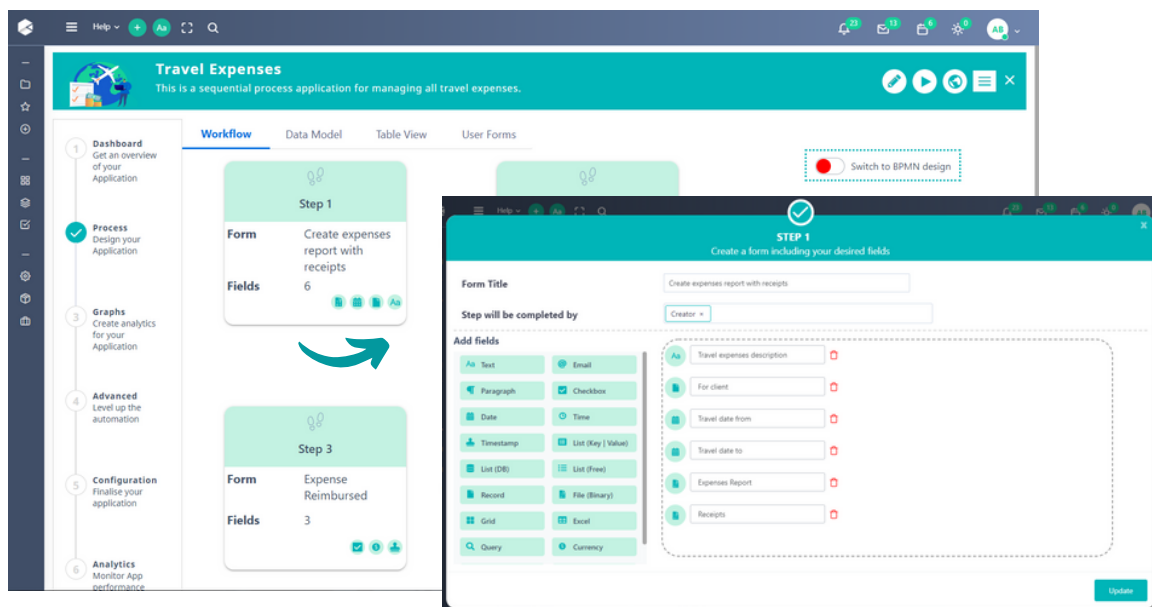
- **Quick stats** give you a lot of information about your app and its usage. There are different Quick Stats for each app type. For example, you can see:
  - The number of records, forms, steps, widgets, or boards that are created in this app
  - The graphs that show the application activity timeline, application overview, or the number of records grouped per board
- **Basic Info** informs you about the type of the app, category, parameters, and customizations. There is also a "Locked" application that prevents other users from editing the app.
- **Collaborators:** the users or groups that have access rights in this app.
- **Comments:** an area where users that have access write and view comments.

## APP CREATION STEPS

Comidor App Designer requires little to no prior knowledge of coding to build any type of application.

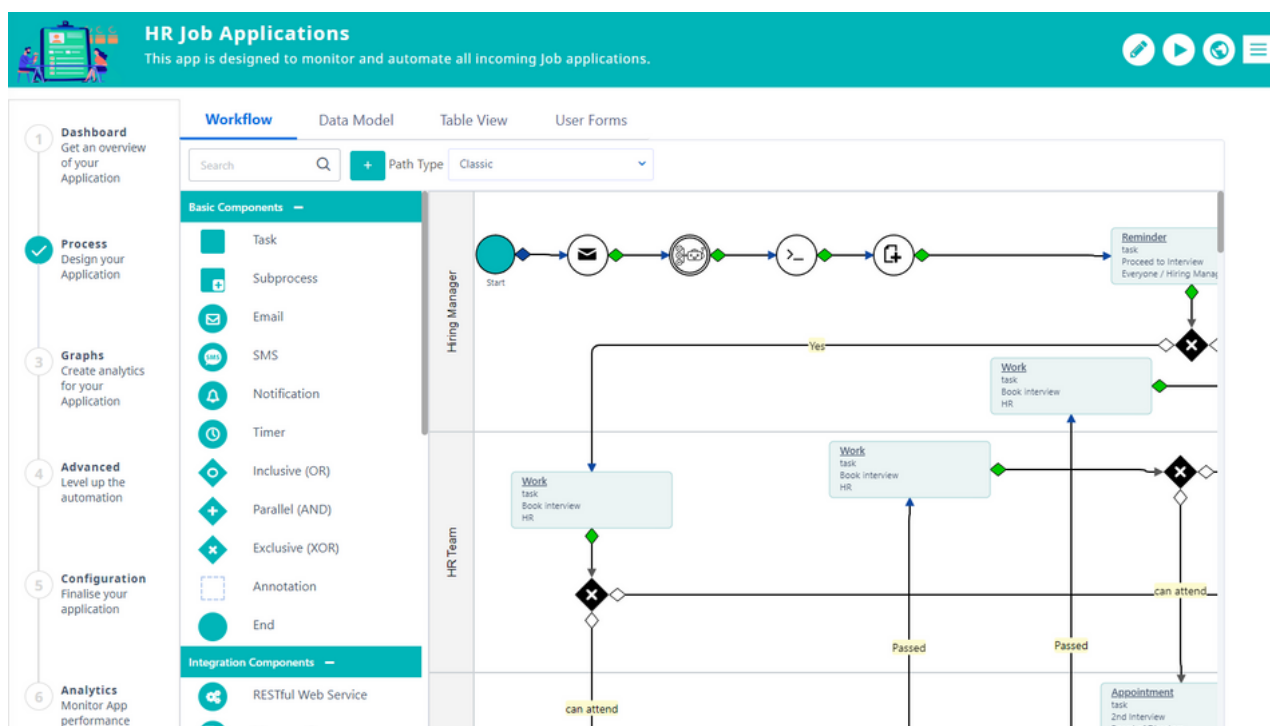
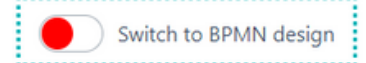
Instead of using complex programming languages, you are able to build apps in a simple way with drag-and-drop components.

Define one by one the steps of your application. Each step is a task with assignees, forms, and fields. Create all your steps from one interface and all respective forms and fields are created automatically. In addition to that, a workflow with sequential tasks is created.



Do you want more functionalities?


Switch to BPMN and add as many workflow components and automation tools as you like, including RPA and AI/ML.



## APP FIELDS

Once you have created your form, all fields can be found in the tab "User Fields". Additionally, you can create new fields from scratch. The field types are:

- Text
- Paragraph
- Date
- Timestamp
- Number
- Email
- Checkbox
- Time
- List (Key | Value)
- Phone
- List (DB)
- Record
- Customizable Grid
- Query
- URL
- List (Free)
- File (Binary)
- Excel
- Currency
- Encrypted


**Travel Expenses**  
 This is a sequential process application for managing all travel expenses.

Workflow **Data Model** Table View User Forms

**Data Model**

|  | Label           | Size  | Column name         | Created by       | Created on               | Last Updated by | Last Updated on          |
|--|-----------------|-------|---------------------|------------------|--------------------------|-----------------|--------------------------|
|  | Other file      | 9     | USR_OTHER_FILE      | YV Yvan Veldeman | Jun 28, 2022 11:51:25 AM | Yvan Veldeman   | Jun 28, 2022 11:51:25 AM |
|  | Ref no          | 9     | USR_REF_NO          | YV Yvan Veldeman | Jun 28, 2022 11:29:59 AM | Yvan Veldeman   | Jun 28, 2022 11:29:59 AM |
|  | Amount paid     | 12    | USR_AMOUNT_PAID     | YV Yvan Veldeman | Jun 28, 2022 11:29:02 AM | Yvan Veldeman   | Jun 28, 2022 11:29:02 AM |
|  | Paid            | 1     | USR_PAID            | YV Yvan Veldeman | Jun 28, 2022 11:29:02 AM | Yvan Veldeman   | Jun 28, 2022 11:29:02 AM |
|  | Paid at         | 0     | USR_PAID_AT         | YV Yvan Veldeman | Jun 28, 2022 11:29:02 AM | Yvan Veldeman   | Jun 28, 2022 11:29:02 AM |
|  | Approved        | 1     | USR_APPROVED        | YV Yvan Veldeman | Jun 28, 2022 11:28:01 AM | Yvan Veldeman   | Jun 28, 2022 11:28:01 AM |
|  | Comments        | 10000 | USR_COMMENTS        | YV Yvan Veldeman | Jun 28, 2022 11:28:01 AM | Yvan Veldeman   | Jun 28, 2022 11:28:01 AM |
|  | Expenses Report | 9     | USR_EXPENSES_REPORT | YV Yvan Veldeman | Jun 28, 2022 11:27:22 AM | Yvan Veldeman   | Jun 28, 2022 11:27:22 AM |

Different icons for each field type are also shown to enhance the rapidity of designers' comprehension.

|  | Label             | Size | Column name           | Created by       | Created on              | Last Updated by | Last Updated on         |
|--|-------------------|------|-----------------------|------------------|-------------------------|-----------------|-------------------------|
|  | Property Category | 100  | USR_PROPERTY_CATEGORY | YV Yvan Veldeman | Jul 20, 2022 6:51:18 AM | Yvan Veldeman   | Jul 20, 2022 6:51:18 AM |
|  | Picture           | 9    | USR_PICTURE           | YV Yvan Veldeman | Jul 20, 2022 6:48:36 AM | Yvan Veldeman   | Jul 20, 2022 6:48:36 AM |
|  | Link videocall    | 255  | USR_LINK_VIDEOCALL    | YV Yvan Veldeman | Jul 20, 2022 6:48:20 AM | Yvan Veldeman   | Jul 20, 2022 6:48:20 AM |
|  | Price             | 12   | USR_PRICE             | YV Yvan Veldeman | Jul 20, 2022 6:48:08 AM | Yvan Veldeman   | Jul 20, 2022 6:48:08 AM |
|  | Country           | 255  | USR_COUNTRY           | YV Yvan Veldeman | Jul 20, 2022 6:47:55 AM | Yvan Veldeman   | Jul 20, 2022 6:47:55 AM |
|  | City              | 150  | USR_CITY              | YV Yvan Veldeman | Jul 20, 2022 6:47:40 AM | Yvan Veldeman   | Jul 20, 2022 6:47:40 AM |
|  | Address           | 150  | USR_ADDRESS           | YV Yvan Veldeman | Jul 20, 2022 6:47:33 AM | Yvan Veldeman   | Jul 20, 2022 6:47:33 AM |
|  | Name              | 150  | USR_NAME              | YV Yvan Veldeman | Jul 20, 2022 6:47:24 AM | Yvan Veldeman   | Jul 20, 2022 6:47:24 AM |

## TABLE VIEW

Through Table View, users determine the columns they wish their app to have in the main table. By default, the table includes all the table fields created in the Data Model. Users can easily rearrange the fields or add new ones with drag-and-drop.

**Properties**

1 **Dashboard**  
Get an overview of your Application

2 **Forms/Fields**  
Design your Application

3 **Graphs**  
Create analytics for your Application

4 **Advanced**  
Level up the automation

5 **Configuration**  
Finalise your application

Data Model **Table View** User Forms

**Basic Options**








Please drag and drop columns on the right side to edit the application table

# CREATE\_USER

# P ID

T Property Category

**Application Table**

| Property...  x | Name  x | Address  x | City  x | Country  x | Price  x | Link vide...  x |
|---|--|---|--|---|---|--|
| Text 1  | Text 1   | Text 1  | Text 1   | Text 1  |   |  |
| Text 2  | Text 2   | Text 2  | Text 2   | Text 2  |   |  |
| Text 3  | Text 3   | Text 3  | Text 3   | Text 3  |   |  |

## APP FORMS

In this update, we prioritized keeping things familiar while upgrading the overall form designer's UI with enhanced visual enhancements in order to keep the interface compact and easier to work with.

**Sales Proposals**

1 **Dashboard**  
Get an overview of your Application

2 **Process**  
Design your Application

3 **Graphs**  
Create analytics for your Application

4 **Advanced**  
Level up the automation

5 **Configuration**  
Finalise your

Workflow Data Model Table View **User Forms**

You haven't selected a form. Please select one!

Select a form

Searching...

- Proposal creation
- Verify Proposal by Billing manager
- Commercial proposal
- Pre-credit evaluation

Design your form by inserting sections, paragraphs, groups, code elements as well as your desired fields. Simply drag and drop the element you wish on the page.

The screenshot displays the 'Design' view of the COMIDOR V6.2 form builder. On the left, there is a sidebar with 'Elements' (Panel, Section, Code, Paragraph, Style, Misc, Group) and 'Fields' (Search, Sales Proposals, T Process, Address, Approval date, Approver, Business Needs, Changes required, Client comments, Client VAT, Comments by billing manager, Commercial Proposal, Commercial proposal document, Company name). The main workspace shows a form layout with four columns: 'Account info', 'Address', 'Documents', and 'Approvals'. The 'Account info' column contains fields for 'Ref no', 'Client VAT', 'Company name', 'New client?', and 'Client comments'. The 'Address' column contains 'Address', 'Zip Code', 'Email', 'Fax', 'Phone', and 'Services'. The 'Documents' column contains 'Commercial proposal document', 'Contract', and 'Technical Proposal document', each with a 'Choose File' button. The 'Approvals' column contains 'Verify proposal by billing manager', 'Verify costs and margins', 'Negotiation result', and 'Pre-credit evaluation'. Below these columns is a 'Process info' table with rows for 'Business Needs' and 'Parts and equipment', each with columns A, B, and C. On the right, there is a 'Basic' tab with settings for 'Record type' (Sales Proposals), 'Title' (Sales Proposals info), 'Access' (Everyone), 'Main' (checked), 'Primary' (Retain existing form), and 'Quick' (No). A 'Save' button is at the bottom right.

Have overall control over your form appearance. Change fonts, colors, and labels to ensure consistency with your company's brand identity guidelines.

Change the layout of the form by defining one or multiple columns.

Add properties for each field. You can define the mode, label, tooltip, pattern, requirement, alignment, and many more.

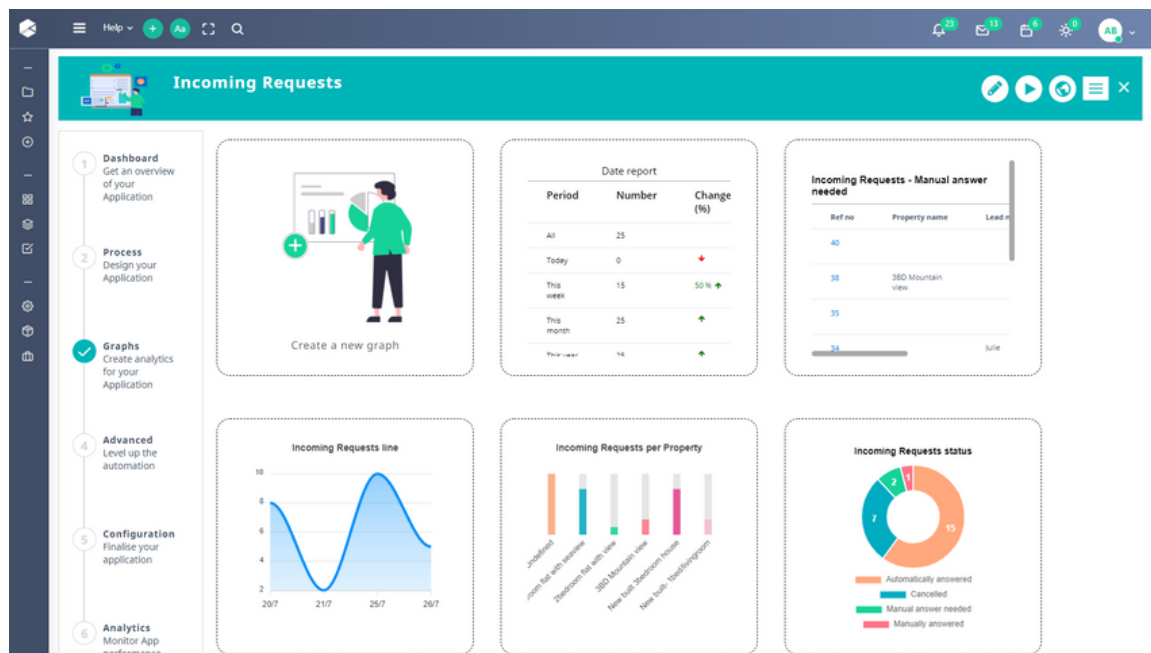
The screenshot displays the 'Design' view of the COMIDOR V6.2 form builder. At the top, there is a 'Design' tab and a warning message: 'You have unpublished changes!'. Below the sidebar, the 'Fields' list includes 'Search', 'Travel Expenses', 'T Process', '\$ Amount paid', and 'Approved'. The main workspace shows a form layout with a 'Section' header. Below the section, there are three fields: 'Travel expenses description', 'For client', and 'Travel date from'. The 'Travel date from' field has a calendar icon. On the right, there is a toolbar with icons for settings, undo, redo, save, and delete. A hand cursor is pointing at the save icon.

Unpublished changes? A warning message reminds users to publish their form after finishing their design.

# GRAPHS

A visual representation of your data is worth a thousand words. In this step, you now leverage widgets to better understand your data.

The live tracking diagrams allow you to make decisions based on the latest information. Create personalized graphs and monitor performance, —all without exiting the App Designer.





## ADVANCED

Get the most out of the App Designer with the "advanced options" step by including user tabs in your records or the table of your app, event scripts, and field rules.

### User tabs

Have complete control over the accessibility of your application.

- The tabs appear inside records (as a tab at the left part of the record) or at the summary table of the application.
- A tab can be a table from any Comidor entity, HTML, or widget.

The 'User Tabs' configuration screen allows users to manage the accessibility of various data visualizations within the application. The interface includes a sidebar with navigation steps (Dashboard, Process, Graphs, Advanced, Configuration) and a main area for configuring user tabs. A preview window shows how these tabs appear in a record, each displaying a different data visualization.

### Event Scripts

Write scripts for a certain data type to be executed before/after/on a specific event.

The 'Event Scripts' configuration screen allows users to write scripts for specific data types to be executed before, after, or on a specific event. The interface includes a sidebar with navigation steps and a main area for configuring event scripts. A form for creating a new script is shown, with fields for Procedure Name, Data Type, Event Type Prefix, Event Type, Position, Parameters, and Procedure Body.

The 'Field Rules' configuration screen allows users to create rules for showing or hiding fields, sections, or tabs based on certain conditions. The interface includes a sidebar with navigation steps and a main area for configuring field rules. A rule titled 'Show travel date to' is shown, with its configuration details displayed.

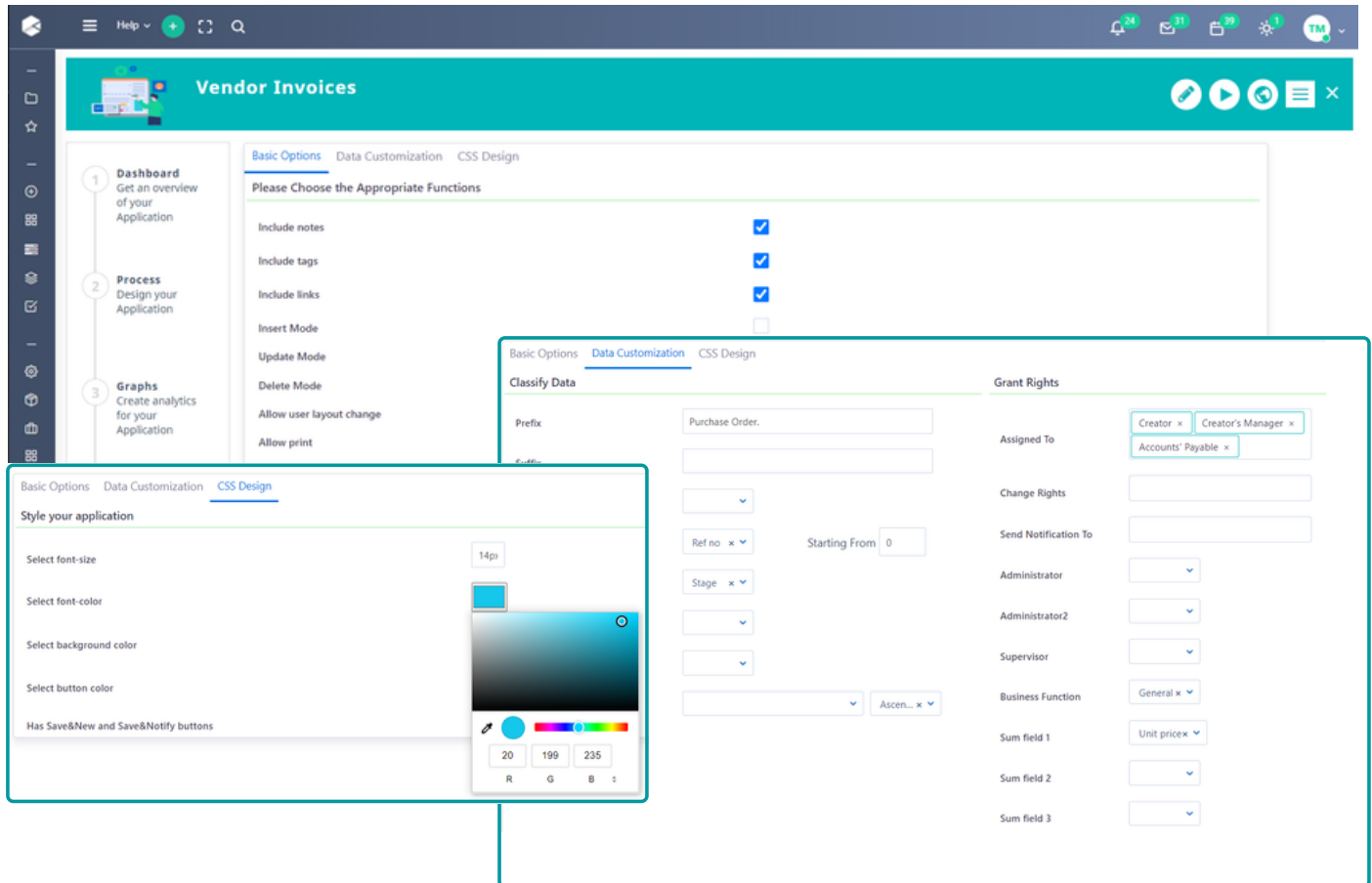
### Field Rules

Field rules enable you to hide or show fields/sections/tabs inside forms when certain conditions are met.



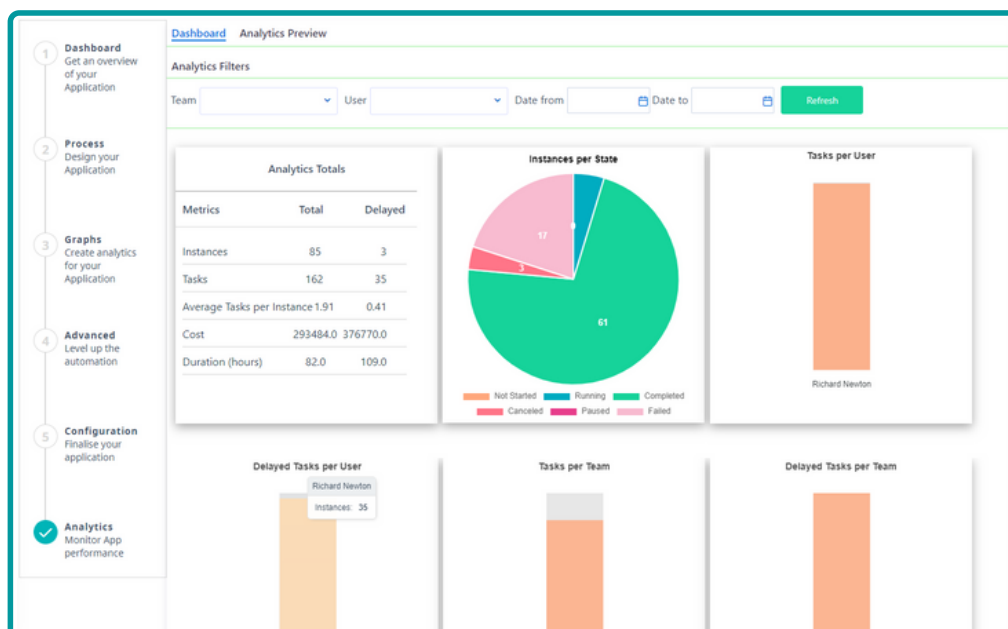
## APP CONFIGURATION

In this last step, you finalize your app by configuring specific functions, classifying data, granting rights and determining the CSS design.



## ANALYTICS

For workflow apps, designers can monitor the application performance with workflow analytics.



## PUBLISH & RUN

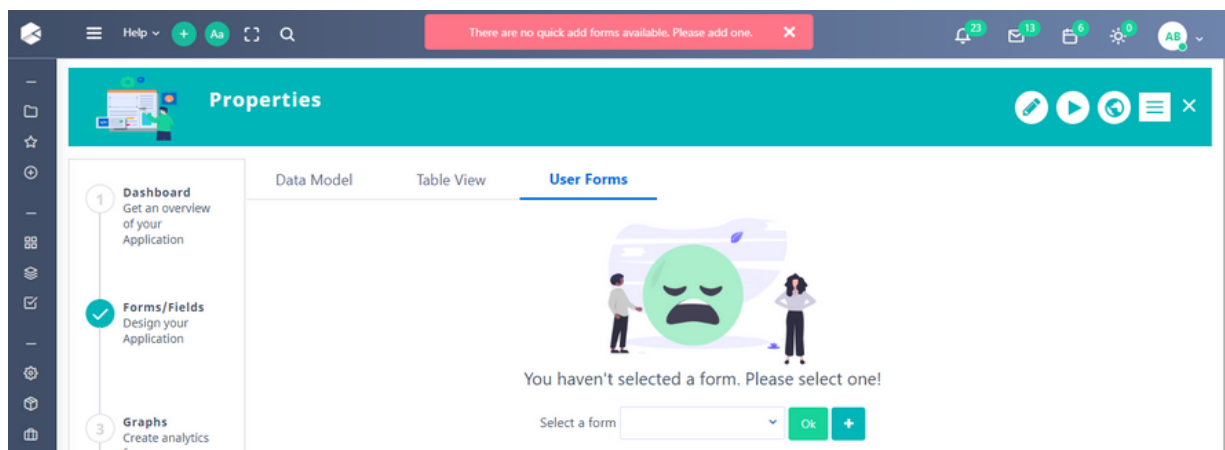
Your app is ready! You can click on the Publish button to bring your app to life. Additionally, while viewing an app in the App Designer, you can easily run it! Click on the Play button and the quick add form of this app is populated.



### What's more?

During the app design process, our aim is to let users know that a required step is skipped or an issue has been encountered and display warning messages to resolve them.

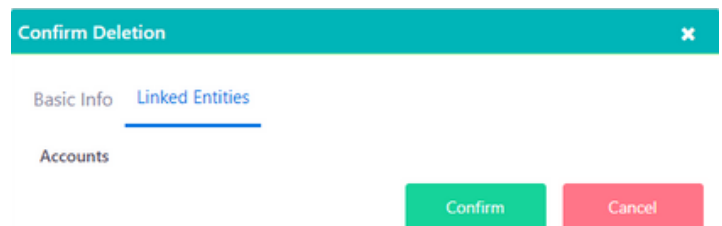
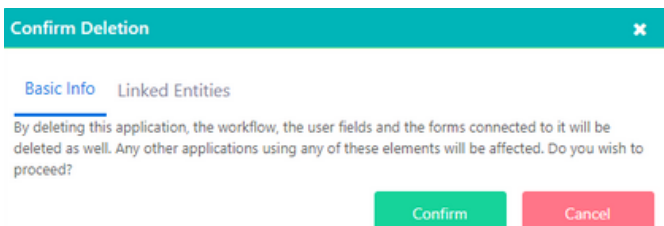
When users hit the run button and a quick add form has not been selected, a warning message is displayed and users get redirected to the step where this action should be performed.



Additionally, it is required for users to select a **primary field** for their app. If this action is skipped, a warning message appears when users try to publish their app, and they get redirected to the corresponding step.

Furthermore, sometimes it is necessary for designers to delete an app. The app might not be useful anymore or it might have been created for testing purposes.

It's important to remember that **deleting an app** may lead to dependency issues. In this new version, users are prompted with a confirmation box asking them if they are sure they want to proceed with the deletion. The window also displays any linked entities that might be affected.



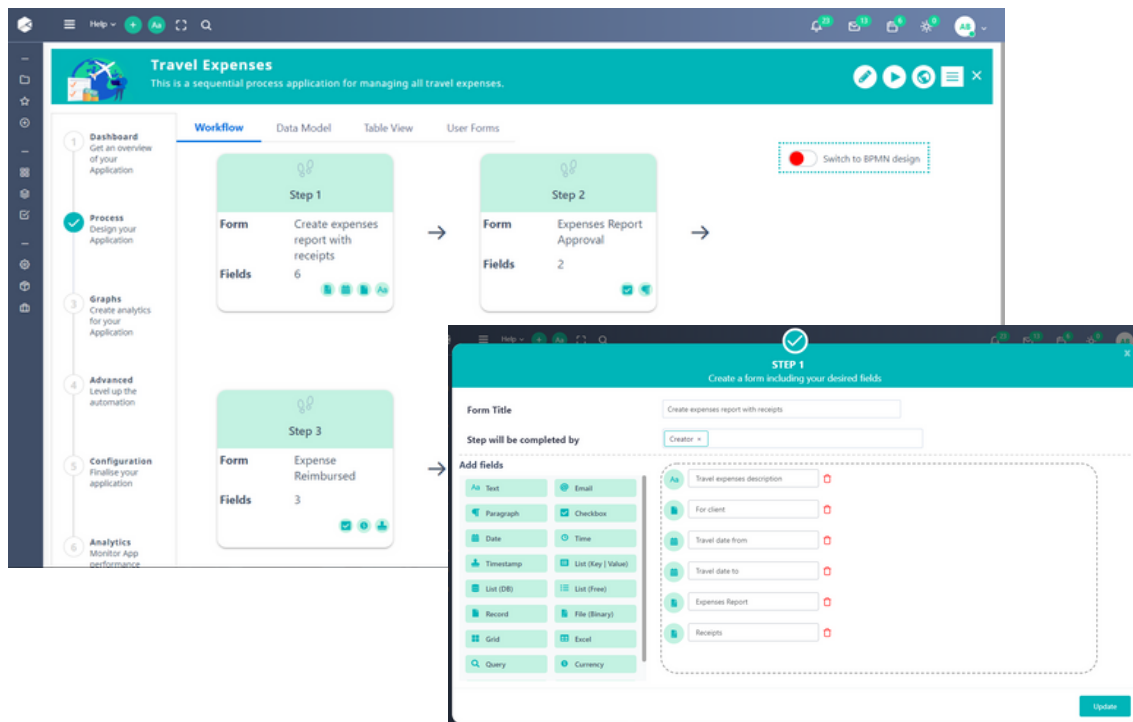
## SEQUENTIAL APPS

A sequential app is a table process-enabled application. Choose this type when you want to monitor processes that are simple with only sequential tasks, with scheduling, state, completion, etc.

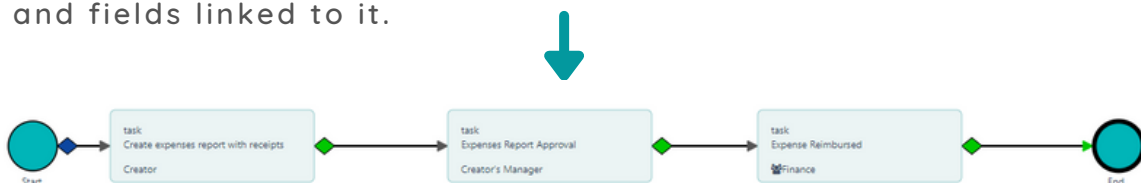
- **STEP 1:** Create an app through App Designer and choose the "Is Sequential" option.

The screenshot shows the 'App Designer' form for creating a new application. The 'Application Type' is set to 'Table Application'. The 'Application Name' field is empty. The 'Description' field is a large text area. The 'Category' is a dropdown menu. The 'Collaborators' field is empty. The 'Is process enabled' checkbox is checked. The 'Is Sequential?' checkbox is checked. The 'Image' field has a 'Choose File' button and 'No file chosen' text. At the bottom right, there are 'Save' and 'Close' buttons.

- **STEP 2:** Define one by one the steps of your application



- Each step is actually a workflow task in BPMN 2.0, with assignees, one form and fields linked to it.



The respective BPMN design

- **STEP 3: Publish & run your app!**

- In the process record, you see all the sequential steps, as created in the App Designer.
- Each step has its own form. Users complete each step/task of the process by clicking on the complete button.
- Once the step is completed, the user proceeds to the next one.

The screenshot displays the COMIDOR V6.2 interface. At the top, the header shows 'TE-12 / 12 Jul 2022' and a status bar with icons for edit, undo, redo, and a 'Running' dropdown. The main area is divided into two sections: 'Relations' and 'Ownership'. The 'Relations' section shows a process flow with three steps: 1. 'Create expenses report with receipts', 2. 'Expenses Report Approval', and 3. 'Expense Reimbursed'. The 'Ownership' section shows the process was created on 12 Jul 2022 09:31:39 by Thomas Monson and updated on 12 Jul 2022 09:32:36 by Thomas Monson. A 'Complete' button is visible at the end of the flow.

The 'Expenses Report Approval' form is shown in a modal window. It has tabs for 'Form', 'Execution Info', and 'Report'. The 'Form' tab is active, showing a 'Section' header, an 'Approved' checkbox (checked), and a 'Comments' text area. The text area contains the text 'Please proceed with payment of 150\$'. At the bottom of the form, there are 'Save and Complete' and 'Cancel' buttons.

## TAB ENHANCEMENTS IN FORMS

Arrange components in complex forms efficiently using tabs. Designers are able to include tabs in forms in order to group form fields and guide the end-users to proper completion.

In this version, we implemented some significant enhancements:

- When creating multiple tabs, you can easily **re-arrange** the position of each tab by clicking on the respective arrows. A remove button for each tab has also been added.
- Furthermore, a **highlighting** option has been added, to give emphasis to the most important tabs.

The screenshot shows the COMIDOR V6.2 interface. At the top, there are four tabs: Tab 1, Tab 2, Tab 3, and Tab 4. Below the tabs is a 'Panel' section. On the left, there is a list of fields: Updated CV, Employee Name, Employee's Email, Employee's Phone, and Employee's Address. A modal window titled 'Add Tabs:' is open, allowing configuration of tabs. The modal includes fields for 'Tabs Number' (4), 'Tabs Name 1' (Tab 1), 'Tabs Name 2' (Tab 2), 'Tabs Name 3' (Tab 3), 'Tabs Name 4' (Tab 4), and 'Layout Mode' (Simple tabbed form).

## FIELD ENHANCEMENTS

- Multi-select field

In custom drop-down lists fields, you are able to allow multiple selections in order to determine whether users can select more than one option in a list.

The screenshot shows the COMIDOR V6.2 interface. The 'Type' field has a dropdown menu with options: List (Key | Value), Key, and Value. Below the dropdown, there is a table with columns 'Key' and 'Value'. A note states: 'Actual field type will be decided automatically depending on the keys'. Below the table, there are fields for 'Default value', 'Tooltip', 'Security Level', and 'Multiple' (checked). A modal window titled 'list' is open, showing a search bar and a list of options: Medium, None, Very Low, High, Medium, Low, Very Low, and None.

In this release, we ensure that user fields that are included in applications not only enhance the user experience but also simplify user actions.

You are now able to utilize phone fields so that end-users make calls by clicking on the [phone](#) number button and using their computer's default application.

#### Work Phone

 6993989882

Additionally, you are able to incorporate email fields so end-users view the [email](#) address and **copy** it into their clipboard by clicking on the respective button, saving their valuable time. Also, an email icon is displayed next to the field in the form so that end-users send emails by clicking on the mail button and using their computer's default application.

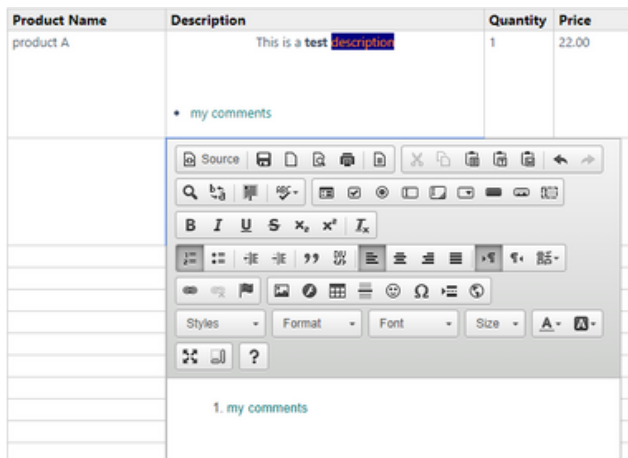
#### Email

 allison@gmail.com 

A new [URL field](#) type has been added that stores clickable hyperlinks.

#### URL

<https://calendar.com/comidor/request-for-demo>



**Excel** fields have been enhanced with HTML columns.

Add HTML cells in your excel grid and view/edit your text with the rich editor.

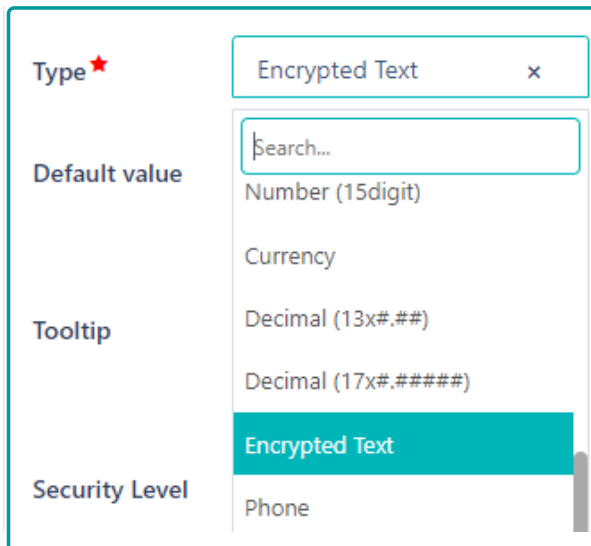
### • Data masking & encryption

Data masking on input type fields is now available for sensitive information like credit card numbers and mobile phones.

This option has been included in the users and user creation forms. In this way, information is shared with authorized people without the fear of exposing critical data.

Depending on the security level of each user, and the security level of each field, the fields are visible to the responsible users.

|                |  |
|----------------|--|
| Type*          | <input type="text" value="Search..."/> |
| Default value  | Public                                 |
| Tooltip        | Protected                              |
| Security Level | Private                                |
|                | <b>Sensitive</b>                       |
|                | Secret                                 |
|                | Top Secret                             |



The screenshot shows a configuration window for a field type. On the left, there are labels: 'Type' with a red star, 'Default value', 'Tooltip', and 'Security Level'. On the right, a dropdown menu is open, displaying a search bar and a list of options. The 'Encrypted Text' option is selected and highlighted in blue. Other options visible in the list include 'Number (15digit)', 'Currency', 'Decimal (13x#.#)', 'Decimal (17x#.#)', and 'Phone'.

With the new user field type "Encrypted text", create text fields with the value stored in the database after being encrypted.

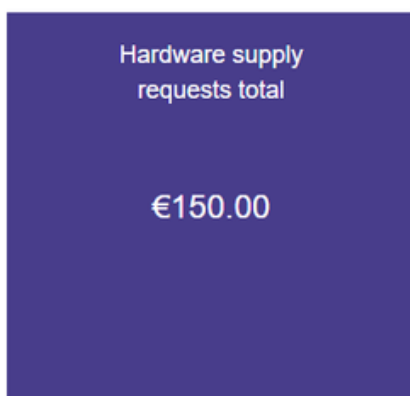
## NEW WIDGET TYPES

We've included three new interactive charts to provide you with more alternatives for visualizing real-time data.

With our brand-new widgets, you are able to take advantage of the data contained in Comidor and speed up the decision-making process.

### Aggregation Widget

The aggregation report displays the sum of the values of a selected numeric field.



### Average Widget

The average report displays the average of the values of a selected numeric field.



Limit the report data by applying a "where" condition.

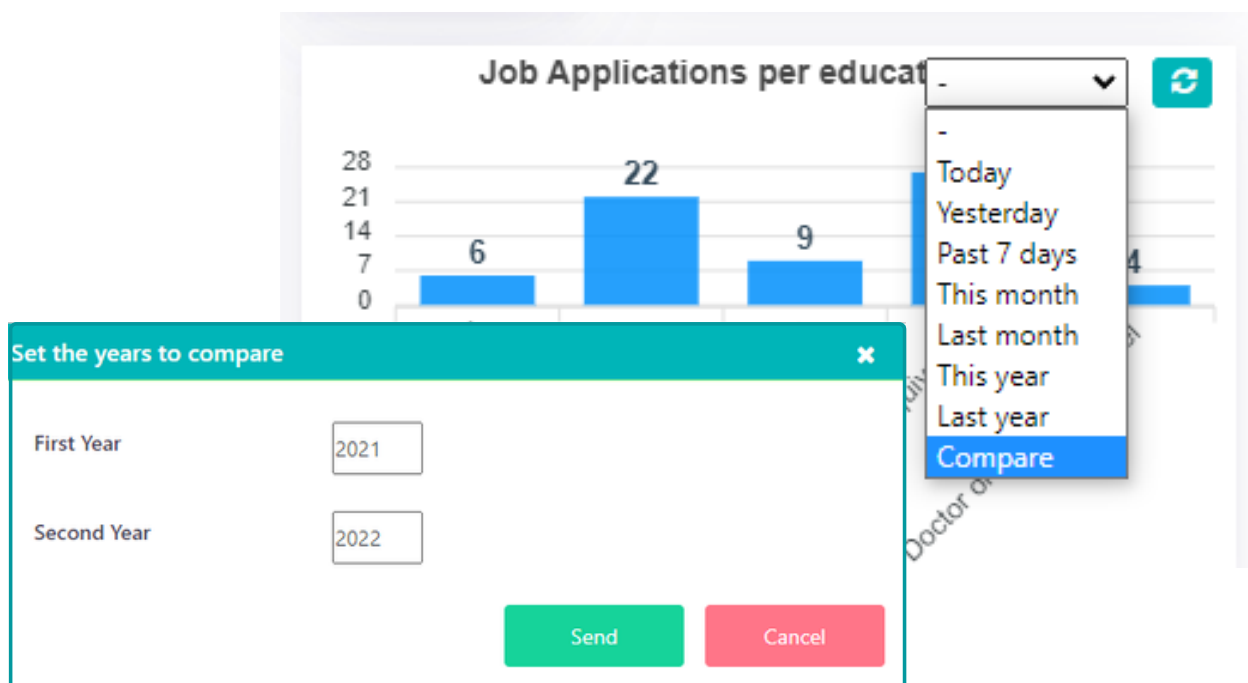
## Reverse table Widget

The reverse table report displays the records of the selected table & its fields horizontally.

| Reverse table report |             |
|----------------------|-------------|
| Ref no               | 23          |
| State                | Completed   |
| Date of request      | 16 Feb 2022 |
| Ref no               | 22          |
| State                | Confirmed   |
| Date of request      | 31 Jan 2022 |
| Ref no               | 21          |
| State                | Confirmed   |
| Date of request      | 26 Jan 2022 |
| Ref no               | 20          |
| State                | Running     |
| Date of request      | 25 Jan 2022 |
| Ref no               | 19          |
| State                | Completed   |
| Date of request      | 27 Oct 2021 |

## YEAR-ON-YEAR COMPARISON IN WIDGETS

Instant real-time reporting with year-on-year analysis enables you to compare your data based on specific years.





# WORKFLOWS

New, dynamic workflow components and features **boost automation** and enhance designing capabilities.

## QR GENERATOR



With the new workflow component QR generator, designers generate QR codes with data defined from the workflow **with no-code**.

- Drag and drop the QR generator component into the design and add it to a workflow step.
- Define the input; hardcoded text or dynamic option from a text field.
- The produced QR code is stored in a binary workflow field, in .png format.
- Display the QR code in the main process form, either as an attachment of an email triggered by the workflow, or as part of a produced document from the document creator component.

## SMS



So far, Comidor users could utilize smart notifications and emails that are triggered in any workflow step. In Comidor v6.2, designers are capable of including an **SMS** alert during the workflow runtime.

- Simply drag and drop an **SMS** component into the workflow design and add it to a workflow step.
- Define the SMS attributes, such as sender name, and telephone number.
- Type your text message and choose the recipients.

## WORKFLOW INTEGRATION COMPONENTS

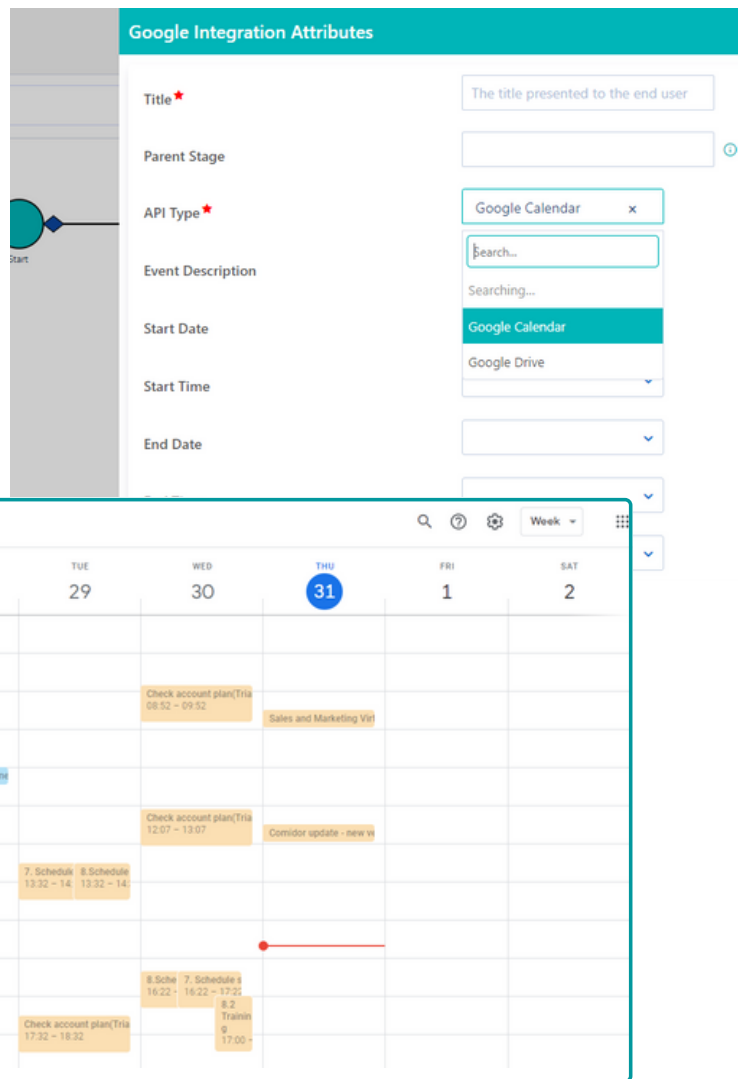
### GOOGLE INTEGRATION



With the new Google integration component, designers send API calls to **Google Calendar** in order to create tasks and to **Google Drive** in order to upload files to a specific folder.

- Simply drag and drop the Google Integration component to a workflow step and choose the **Google Drive API option**.
- Define the folder ID to store the file in Google drive, the file, and its name.

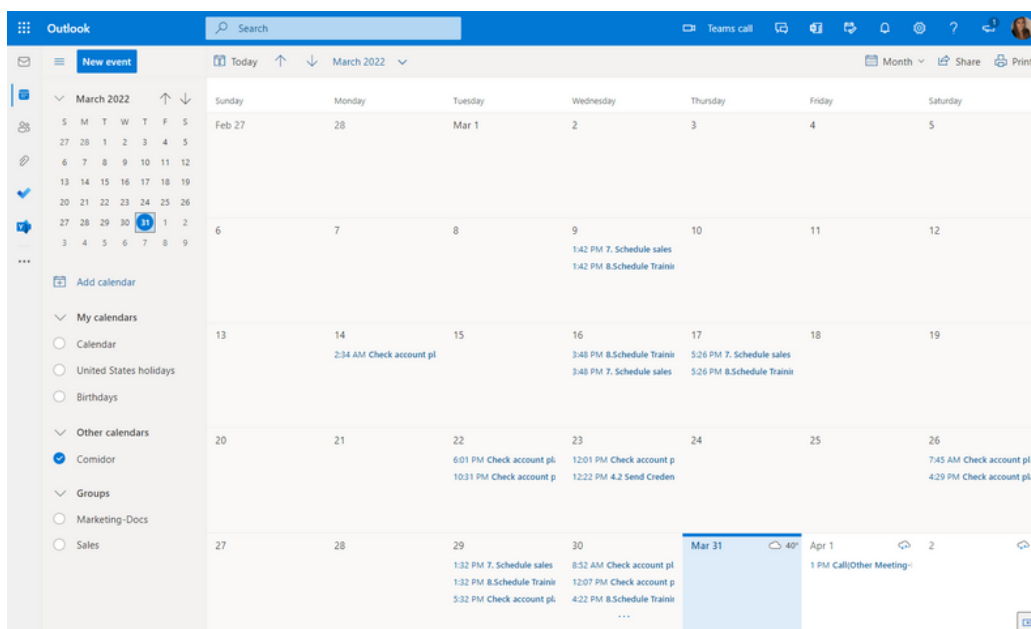
- Simply drag and drop the google integration component to a workflow step, and choose the Google Calendar API option.
- Define the event description, date, and time, for the task to be created in Google Calendar, as well as the email.



## OUTLOOK INTEGRATION

It's no longer hard to monitor all your invitations, meetings, and pending tasks in one single calendar.

By integrating Comidor with your Outlook account, all activities are displayed in your Outlook calendar.



## TEAMS INTEGRATION



In the new version, you are able to integrate Comidor with your Teams Calendar and check all your scheduled meetings, and pending tasks from Comidor in MS Teams Calendar.

Furthermore, with the **Teams** integration workflow component, you can create a new event in MS Teams Calendar.

- Simply drag and drop the Teams integration component to a workflow step and specify its attributes.
- Define the event description, date, and time, for the task to be created in Teams Calendar as well as **the user's email**.

| Teams Integration Attributes |  |
|------------------------------|--|
| Title *                      | <input type="text" value="The title presented to the end user"/> |
| Parent Stage                 | <input type="text"/>   |
| Authority                    | <input type="text"/>   |
| Client Id                    | <input type="text"/>   |
| Secret                       | <input type="text"/>   |
| Scope                        | <input type="text"/>   |
| Event Description            | <input type="text" value="[Processes] Invoice de..."/>           |
| Host Name                    | <input type="text"/>   |
| Location                     | <input type="text"/>   |
| Start Date                   | <input type="text"/>   |
| Start Time                   | <input type="text"/>   |
| End Date                     | <input type="text"/>   |
| End Time                     | <input type="text"/>   |
| Email                        | <input type="text"/>   |

## ZOHO PROJECTS & LEADS API

Easily incorporate Zoho Projects & Zoho Leads APIs with Comidor's drag-and-drop functionality.

- Integrate with Zoho Projects
- Integrate with Zoho CRM



## SALESFORCE API



Create and update records in Salesforce, with the new Salesforce API workflow component.

## FRESHDESK API



- Integrate with Freshdesk ticketing system with the new Freshdesk API workflow component.
- Simply add the Freshdesk API component to a workflow step, define API attributes, and the new ticket is created including the workflow data.

## WORKFLOW COMPONENTS ENHANCEMENTS

### DOCUMENT CREATOR



Document creator capabilities have been significantly improved in Comidor v6.2. Now, designers are able to:

- Display a binary image inside the document, just by defining a respective parameter in the workflow component configuration.
- Create **dynamic** document templates, by looping a whole area of the original template. This is useful in cases where loops exist in the workflows, and designers need to display multiple values in the produced documents.

### DIGITAL SIGNATURE



- In the digital signature by email option, the email task body is now a **rich editor** and you have the opportunity to easily add the format, colors, font styles of your choice.

### ATTACHMENTS IN EMAILS



- Upload a file and use it as **template** in your workflow email component. This appears as an attachment to the recipient in the runtime.
- Other attachments, from binary fields, that were uploaded or produced in previous steps can be still sent.

### NOTIFICATIONS

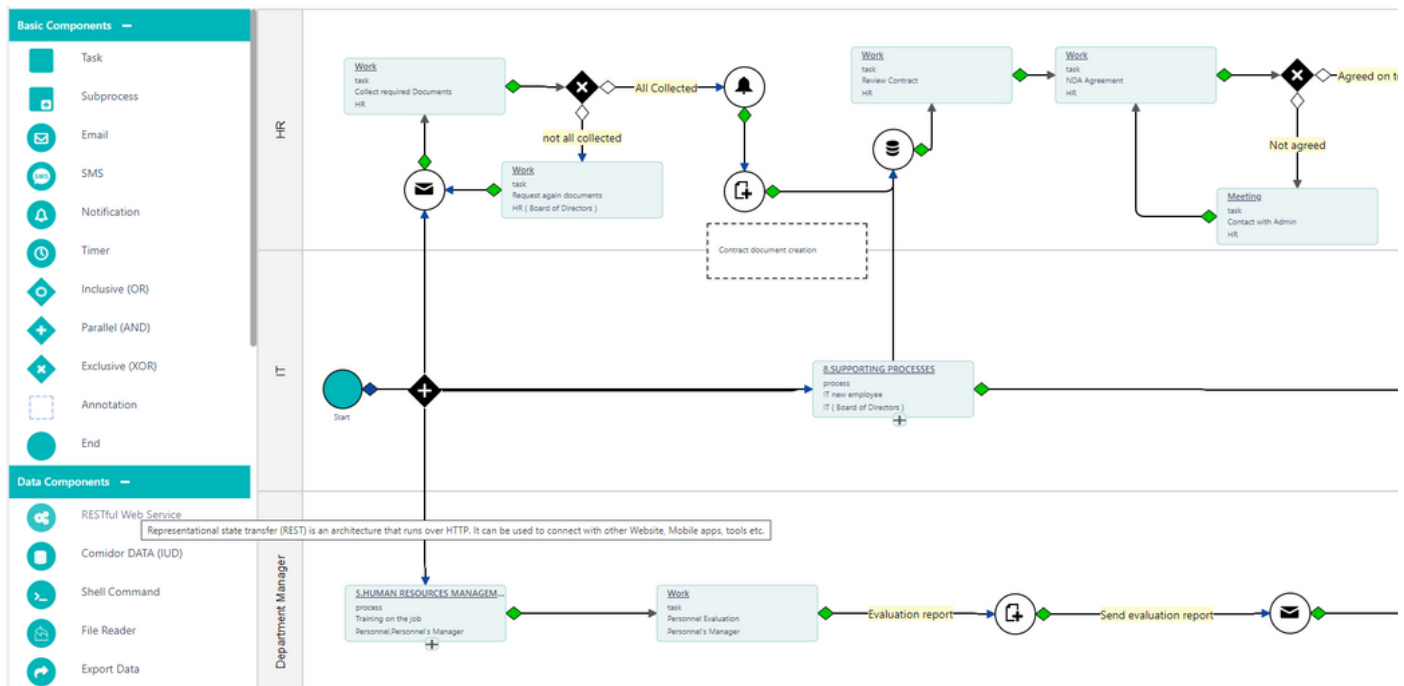
Smart notifications have been enhanced in the workflow design, with extended recipient options:

- **Exclude leaders.** Avoid spamming your leadership with insignificant notifications.
- **Dynamic recipients.** The dynamic user or groups should be defined in a previous step.

# WORKFLOWS REDESIGN

UI and UX capabilities of the workflow designer have been enhanced. In particular:

- We applied color changes to the swim lanes, manual steps (tasks, subprocesses), and labels to conditions so that the workflow designs are easily comprehensible by any user.



- We added tooltips to all workflow components on hover.
- The titles of the swim lanes stay sticky when you scroll to the right.



- We redesigned the subprocess and task attribute forms:
  - by grouping the attributes in tabs,
  - by showing the most critical options, with "More Options" buttons for advanced attributes,
  - by providing guidelines to the designer for proper completion with tooltips and placeholders.

## WORKFLOWS IMPROVEMENTS

- We enhanced the Update log table, which displays all changes that were made in the workflow design, by adding two more columns for the element title and type.

|  | User          | Object Name | Old Value                            | Value                             | Date                 | Element Title        | Element Type |
|--|---------------|-------------|--------------------------------------|-----------------------------------|----------------------|----------------------|--------------|
|  | Thomas Monson | Return PDF  | True                                 | False                             | 03-Mar-2021 12:03:41 | Job application form | DOC CREATOR  |
|  | Thomas Monson | Form        |                                      | 2nd interview outcome JP_PR...    | 27-Nov-2020 15:04:25 | 2nd Interview        | TASK         |
|  | Thomas Monson | Role        | Interviewer                          |                                   | 27-Nov-2020 15:01:33 | 2nd Interview        | TASK         |
|  | Thomas Monson | Description | 2nd Interview: Please select if t... | <p>2nd Interview: Please sele...  | 27-Nov-2020 15:01:33 | 2nd Interview        | TASK         |
|  | Thomas Monson | Role        | Interviewer                          |                                   | 27-Nov-2020 15:00:21 | 1st Interview        | TASK         |
|  | Thomas Monson | Description | 1st Interview: Please select if t... | <p>1st Interview: Please selec... | 27-Nov-2020 15:00:21 | 1st Interview        | TASK         |
|  | Thomas Monson | Return PDF  | False                                | True                              | 27-Nov-2020 14:51:46 | Job application form | DOC CREATOR  |
|  | Thomas Monson | Form        | Proceed to Interview JP_PROC...      | Proceed with interview JP_PRO...  | 27-Nov-2020 14:39:13 | Proceed to Interview | TASK         |
|  | Thomas Monson | Description | Select if you want to see the c...   | <p>Select if you want to see t... | 27-Nov-2020 14:39:13 | Proceed to Interview | TASK         |
|  | Thomas Monson | Return PDF  | True                                 | False                             | 25-Nov-2020 11:53:55 | Job application form | DOC CREATOR  |

- Designers now have a better overview of the previous, active, and scheduled workflow versions of their process design and its validity period.

|   | Title            | Version | Valid from  | Valid to    |
|---|------------------|---------|-------------|-------------|
|  ✓ | Invoice scanning | 2       | 11-May-2022 | 31-Dec-2099 |
|  ✗ | Invoice scanning | 1       | 11-Apr-2022 | 10-May-2022 |

- "Copy Task" functionality has been also improved. Every time you copy a task all of the attributes of a task, including the Work Practice, are copied.

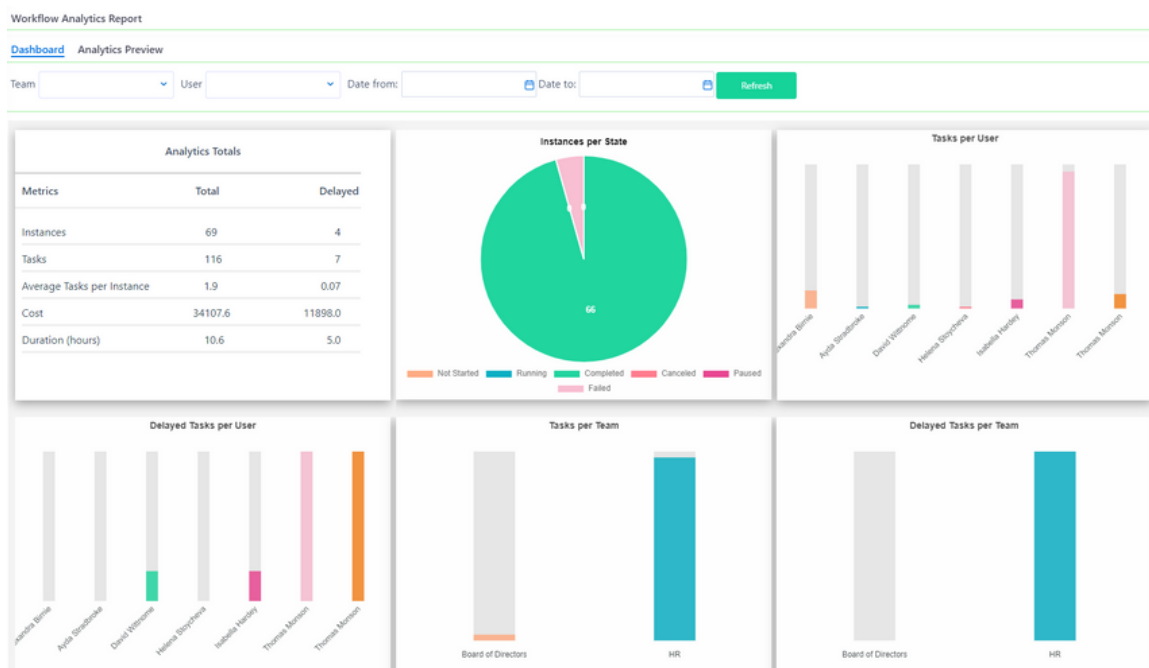
[illegible]

# WORKFLOW REPORTS

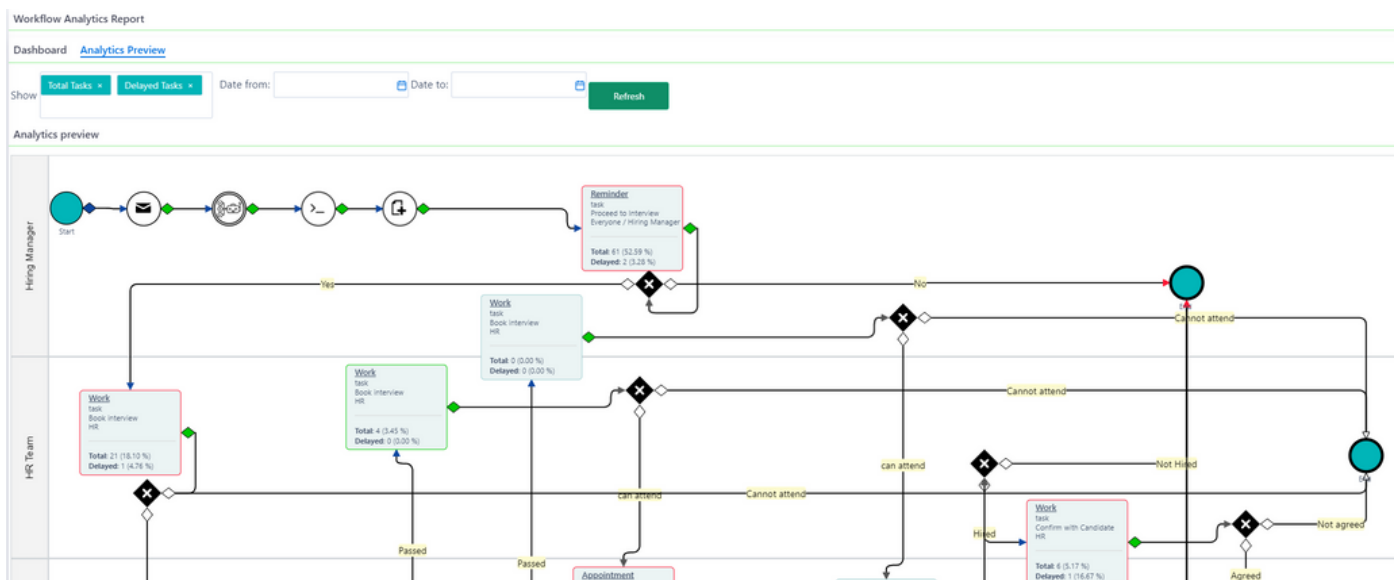
## ✓ Workflow Analytics report

We have updated the **workflow analytics** unit so that you get valuable insights on each workflow usage with improved widgets.

- Choose the workflow that you would like to monitor.
- Check the Analytics totals and the updated widgets regarding the runtime of the chosen workflow in Dashboard tab. Limit your results by choosing team, user or date filters.



- Check the **run diagram** in the analytics preview tab. Apply your preferred filters and get results for time, delays, and cost.
- Pinpoint the total and delayed instances and tasks that were created within your workflow. Identify **serious bottlenecks** through the analytics diagram.



## ✓ Workflow Escalation report

With the new Workflows Escalation Report, you have the opportunity to monitor all escalation notifications that were triggered in a workflow run time, regarding tasks with delayed finish.

- Choose the workflow that you would like to get the report for.

### Workflows Escalation Report

Workflow
Algorithm Approval x
Date created from 01/01/2022
Date created to 31/03/22
Fetch
Clear
Export .xls

| WORKFLOWS ESCALATION REPORT |                              |                          |                       |                  |                             |
|-----------------------------|------------------------------|--------------------------|-----------------------|------------------|-----------------------------|
| Workflow Title              | Escalation Title             | Escalation Date and Time | Task Title            | Assigned to      | Process Description         |
| Algorithm Approval          | Notify User for pending task | 11 Jan 2022 08:06:41     | Business Owner Review |                  | A.A105                      |
| Algorithm Approval          | Notify User for pending task | 11 Jan 2022 08:06:41     | Business Owner Review |                  | A.A106                      |
| Algorithm Approval          | Notify User for pending task | 11 Jan 2022 08:06:41     | Business Owner Review | Charlie Marr     | Approval 134-Algo 4         |
| Algorithm Approval          | Notify User for pending task | 11 Jan 2022 08:26:53     | Business Owner Review | Alexandra Birnie | Approval 137-A11            |
| Algorithm Approval          | Notify User for pending task | 11 Jan 2022 09:21:36     | Business Owner Review | Thomas Monson    | Approval 138-Algorithm AC   |
| Algorithm Approval          | Notify User for pending task | 12 Jan 2022 08:24:10     | Business Owner Review | David Wittnome   | Approval 139-Algorithm name |
| Algorithm Approval          | Notify User for pending task | 11 Feb 2022 15:45:55     | Business Owner Review |                  | Approval 143-Algorithm ABC  |
| Algorithm Approval          | Notify User for pending task | 17 Feb 2022 09:09:55     | Business Owner Review | Alexandra Birnie | Approval 144-New algo       |
| Algorithm Approval          | Notify User for pending task | 17 Feb 2022 12:23:35     | Business Owner Review | Charlie Marr     | Approval 145-Algo ASD       |
| Algorithm Approval          | Notify User for pending task | 17 Feb 2022 13:16:06     | Business Owner Review | Alexandra Birnie | Approval 146-Algo B         |
| Algorithm Approval          | Notify User for pending task | 18 Feb 2022 08:15:12     | Business Owner Review | Alexandra Birnie | Approval 147-Algo KJK       |
| Algorithm Approval          | Notify User for pending task | 18 Feb 2022 08:42:38     | Business Owner Review |                  | Approval 148-Algo name      |
| Algorithm Approval          | Notify User for pending task | 18 Feb 2022 09:17:06     | Business Owner Review | Alexandra Birnie | Approval 149-Test Algo      |
| Algorithm Approval          | Notify User for pending task | 18 Feb 2022 10:34:59     | Business Owner Review | Isabella Hardey  | Approval 150-Algo name      |
| Algorithm Approval          | Notify User for pending task | 18 Feb 2022 12:02:11     | Business Owner Review | Alexandra Birnie | Approval 151-Algo 18/2      |
| Algorithm Approval          | Notify User for pending task | 10 Mar 2022 15:18:40     | Business Owner Review | Alexandra Birnie | Approval 152-Algo 10/3      |
| Algorithm Approval          | Notify User for pending task | 11 Mar 2022 13:42:07     | Business Owner Review | Alexandra Birnie | Approval 153-algo name 3    |
| Algorithm Approval          | Notify User for pending task | 17 Mar 2022 14:06:03     | Business Owner Review |                  | Approval 154-Algo 17        |

- Limit your results by choosing date filters.
- Get useful information about the escalation (title, date, time) that was sent, in relation to the task, to the user it was sent and to the process.
- Export to .xls option is available, too.

## SHOW/HIDE RULES IMPROVEMENTS

Until now, designers could include a field rule to show or hide one field in one form under specific conditions. The Field Rules functionality has been now enhanced and gives the ability to the users to:

- Show or Hide multiple fields in a form when specific conditions are met. Simply click on the (+) button to add as many fields as you like.

Rule title\*

Show multiple fields

Action

Show x

On

Fields x

Field(s)

Process

Client VAT

New client?

Appearing in form\*

Verify Proposal by Billing mana... x



- Show or Hide one or multiple sections of a form when specific conditions are met. Simply click on the (+) button to add as many sections as you like.

This screenshot shows the configuration for a rule titled 'Show multiple sections'. The 'Action' is set to 'Show'. The 'On' condition is 'Sections'. The 'Appearing in form' is 'Commercial proposal'. The 'Section(s)' field has 'Account info' selected, with a '+' button to add more sections.

- Show or Hide one or multiple tabs of a form when specific conditions are met. Simply click on the (+) button to add the tabs you want to be hidden or shown.

This screenshot shows the same configuration as the previous one, but with the 'Tab(s)' dropdown menu open. The menu lists 'Technical Proposal', 'Commercial Proposal', and 'Business info' under a 'Searching...' header. The 'Rule title' is 'Show multiple sections', 'Action' is 'Show', 'On' is 'Tabs', and 'Appearing in form' is 'Commercial proposal'.

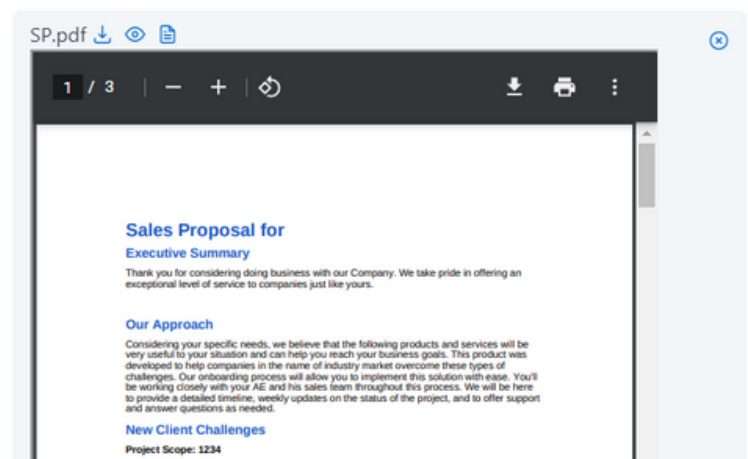
## CONVERT A TEXT FIELD INTO A DYNAMIC VALUE-LIST

Usually, a value list field has predefined options. There are some cases though, where the options of a list field may vary depending on certain factors. Some examples could be a list that fetches the emails of active clients table, or a list with options that were specified in a previous workflow step.

- Via the Shell command workflow component, designers are now able to convert a text field into a dynamic value list with a simple script in a workflow design.
- The values of each option can be defined from the values of other fields.
- Each record has different options based on the workflow runtime.

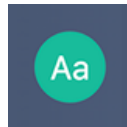
## GET A PREVIEW OF A DOC/PDF IN A WORKFLOW TASK

You are now able to get a preview of a doc/pdf that has been uploaded or produced and stored in a binary field of a workflow inside the form of a task, without being redirected to another tab of the browser.

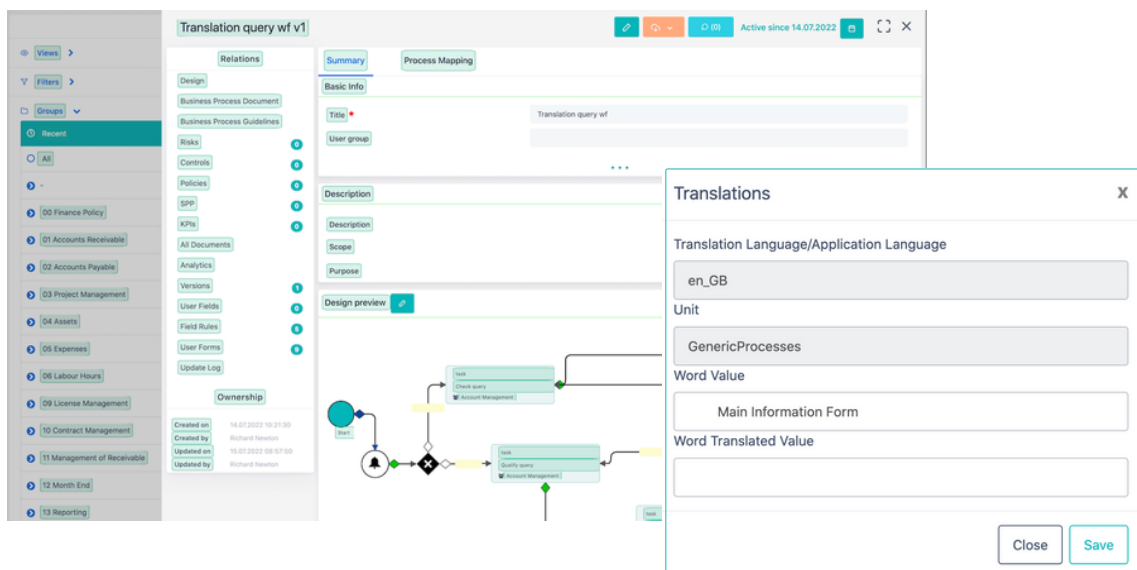


# GENERAL

## TRANSLATIONS



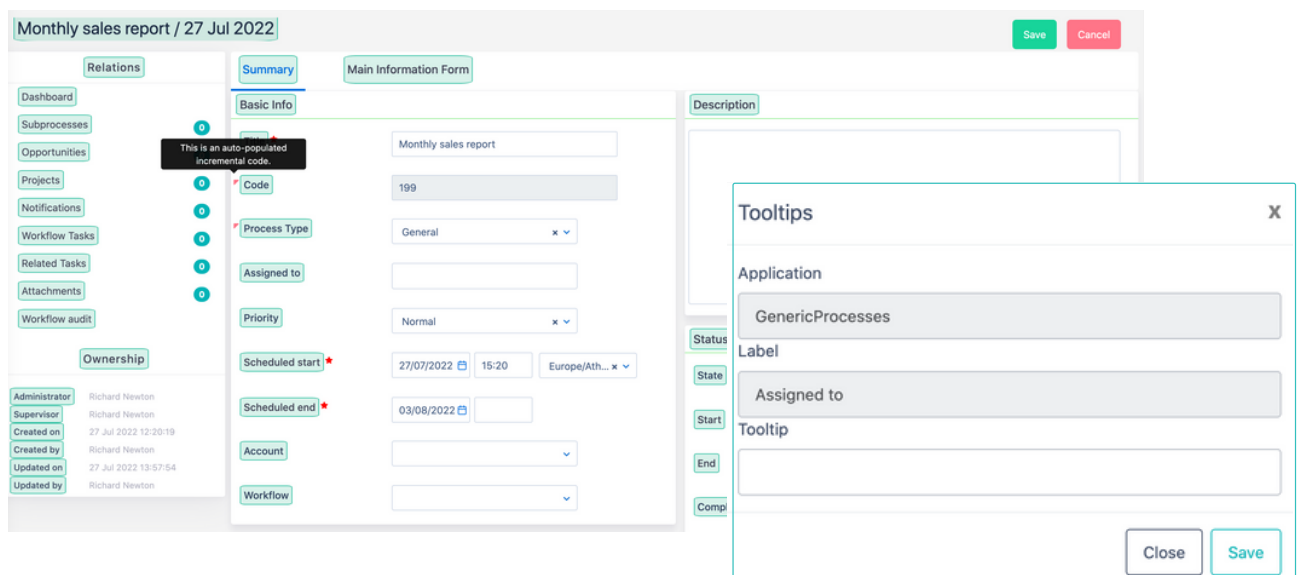
- ✓ We want Comidor users to stay agile and have a wonderful experience with our platform. For that reason, we are introducing low-code translation capabilities. As you navigate the platform, you can translate any word you wish (labels, unit titles, etc.) to the application language you want. The translation is saved in the Translations unit, so the next time your team members enter the platform, they see the translated words.



## TOOLTIPS



- ✓ Tooltips provide essential information for users and act as guides while using Comidor platform. In this new version, you create tooltips for any form label, while completing a form. Simply, click on the responsive icon on the top left of your screen, click on the term you want to add a tooltip for, and, write the tooltip text.



## SEARCH IN LINKS & ATTACHMENTS

- ✓ A Search field is added to the pop-up window of the linked items of a record, as well as to the attachment tab of a process. Find easier and more conveniently your desired record or attachment.

**Linked With**

| Table     | Description        |
|-----------|--------------------|
| Documents | control risks.docx |
|           | leads (13).csv     |
|           | ALG.21_Algo 3.docx |
|           | leads (14).csv     |
|           | leads (15).csv     |

**Attachments**

| Name               | Updated By     | Last Modified           |
|--------------------|----------------|-------------------------|
| leads (13).csv     | Richard Newton | Jan 18, 2022 1:01:58 PM |
| leads (14).csv     | Richard Newton | Jan 18, 2022 1:01:58 PM |
| leads (15).csv     | Richard Newton | Jan 18, 2022 1:01:58 PM |
| ALG.21_Algo 3.docx | Richard Newton | Jan 18, 2022 1:01:57 PM |
| control risks.docx | Richard Newton | Jan 18, 2022 1:01:57 PM |

## NOTIFY USERS OR GROUPS VIA E-MAIL

- ✓ In every process, you now have the option to notify people via email. The system automatically sends an email to the email address that was registered in the system for the specific person.

**Notify**

Notification message: Process import new leads / March 31, 2022

Select users to notify: private

Send Email notification? ☒

**Notify**

Groups:

Users: Alexandra Birnie

Alexandra Birnie

**Exclude**

Groups:

Users:

Select Email Recipients:

\*From: alexandrabirnie1@gmail.com

\*Recipients:


Send Cancel

## QUICK ADD MULTIPLE PROCESSES

- ✓ You can now start multiple processes at once. First of all, define the application/entity for which you want to start multiple processes, then choose a .csv file with all the data to be uploaded, and the separator of your .csv file. After clicking save, the system starts as many processes as the rows of the .csv you have uploaded.

⊕ Quick Add

Multiple Processes



- Keep in mind that in the header row of your .csv, you should include the database names of each user field you wish to get value.
- Also, add as many rows as the number of processes you want to be triggered.

Start Multiple Processes

Entity ★ HR On-Boarding x


File ★ Choose File multiple processes test.csv

Upload a .csv file with data and columns from user fields of the chosen entity

Delimiter ★ |

Save





Cancel



## ASSIGN RESPONSIBLE PERSON

- ✓ In version 6.2, a new tab is added, so that you assign a responsible person to products & services. Specifically, managers can now book a service and not only a resource. For instance, they can book a business analyst for 5 hours for a specific project. A notification is automatically sent to the responsible person(s).

PM Project Manager

Relations

Cost 5  
Sales Rates 10  
Assign Responsible Person 1

Ownership

Created on 21 Nov 2017 09:16:16  
Created by Thomas Monson  
Updated on 21 Nov 2017 09:16:16  
Updated by Thomas Monson

Summary

Services Responsibles

Responsible Person

Division

Company

|                          |  |        |                |
|--------------------------|--|--------|----------------|
| <input type="checkbox"/> | <div>TM</div> <div>Thomas Monson</div> | Europe | United Kingdom |
|--------------------------|--|--------|----------------|

## AUTOMATED PROJECT CREATION

It's time to level up your sales automation and speed up your sales cycle with the new automated project creation feature! If an opportunity is completed and marked as "Closed-Won", a new project can be created automatically. A confirmation pop-up window opens to choose whether you want to create a project or not.

In the new project, the following fields are filled in automatically, by mapping them with the closed opportunity's relevant fields:

- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"> <li>• Opportunity name</li> <li>• Account referred to the opportunity</li> <li>• Admin in the opportunity</li> <li>• Description in the opportunity</li> </ul> | ➔ | <ul style="list-style-type: none"> <li>• Project name</li> <li>• Account referred to the project</li> <li>• Project Manager in the project</li> <li>• Description in the project</li> </ul> |
|---|---|---|

## EXPORT ABSENCES

- ☒ Export absence records from the absence management table and save them in a .xlsx file.

Absence Management

Absence Calendar

Absence Report

Entitlement Setup

Search...

Advanced search

Export

| <input type="checkbox"/> | Approval status | State     | Title           | Scheduled date | Scheduled to | Leave Type | Name             | <div><div></div><div></div></div> |
|--------------------------|-----------------|-----------|-----------------|----------------|--------------|------------|------------------|-----------------------------------|
| <input type="checkbox"/> | Pending         | Completed | 5 days off      | Jul 6, 2020    | Jul 10, 2020 | Vacation   | Richard Newton   |                                   |
| <input type="checkbox"/> | Pending         | Completed | Summer holidays | Jun 30, 2020   | Jul 10, 2020 | Vacation   | Alexandra Birnie |                                   |

FOR MORE INFORMATION PLEASE CONTACT:

## Customer Success Team

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+44 (0)20 3397 8057



[customer.success@comidor.com](mailto:customer.success@comidor.com)



[www.comidor.com](http://www.comidor.com)

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