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Sales Automation Training Material

Sales Automation

- Comidor Sales Automation provides all the tools necessary to initiate and complete repetitive sales cycles successfully.
- Comidor Sales Automation manages Accounts, Clients, Partners, Suppliers, and Competitors all in one rich user interface, with detailed past activity, notes, documents, email threads, and sales processes, all in one place.
- Contacts, one of the most important stakeholders in your B2B or B2C sales plan, are interactively identified, linked, and presented along with the corresponding lead or opportunity.
- Complete the sales process, including quotation, proposal, and contract management, as well as ordering and billing, all powered by workflow automation and low-code capabilities. Combine the Opportunities core unit with a workflow to orchestrate all sales cycle steps. Alternative paths, automated alerts and emails, as well as SLAs can be included in the workflow to enhance sales automation.
- Take full advantage of the powerful built-in sales reports and analytics. Use the Pipeline Chart to compare won opportunities vs lost ones. Check the Sales Funnel Chart to review the sales process.

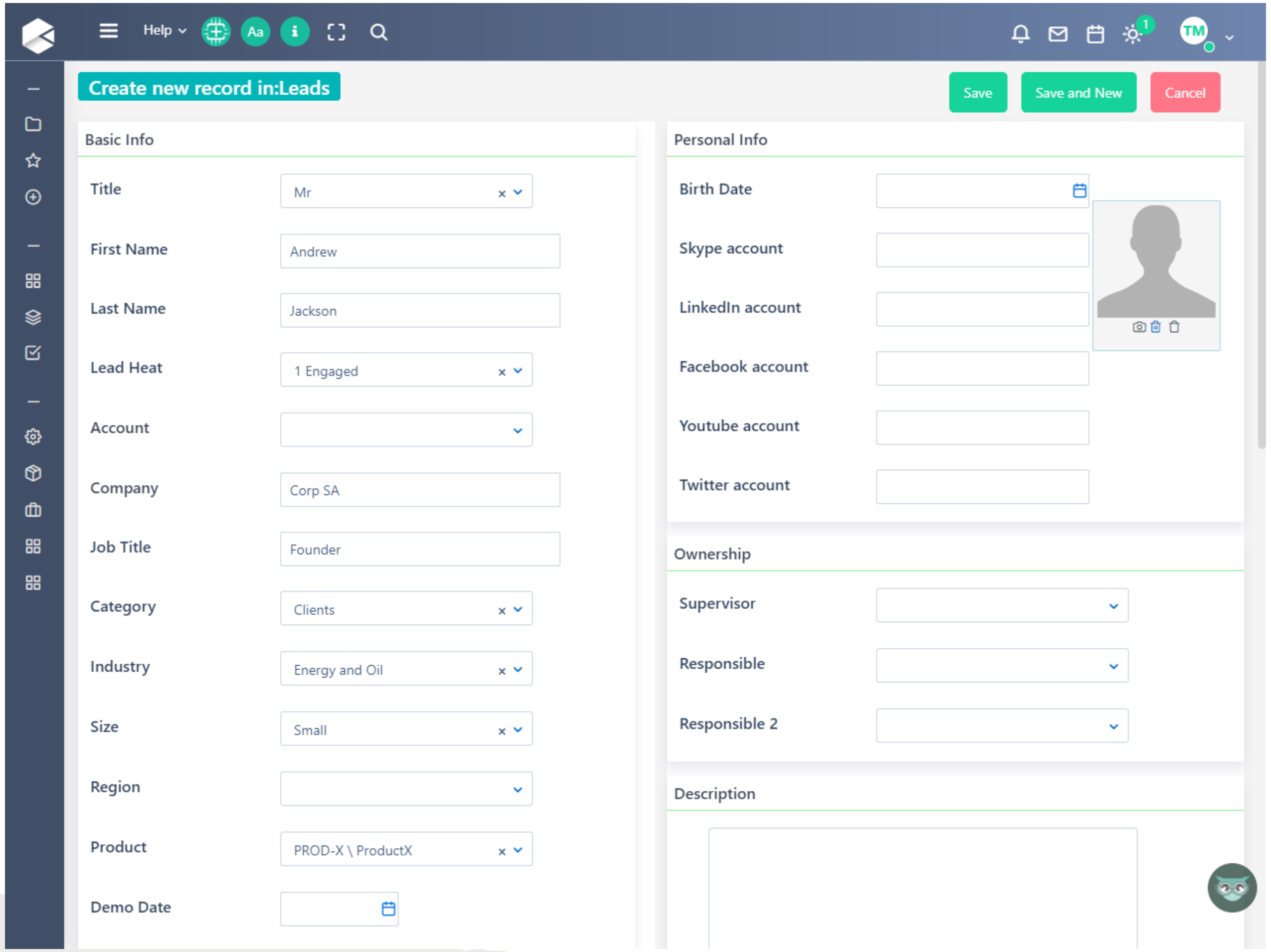
Find out more here.

Leads

Comidor's Leads Unit offers you a dedicated area for your leads, allowing you to maximize your chances of converting them into valuable clients.

Create a new lead

- Add basic info such as Title, First Name, Last name, etc. Lead Heat is the state of engagement of the lead (Just a name, Engaged, Prospect, etc.).
- Link your lead with an existing company (account) or with the product they are interested in.
- Define the contact information (address, email, etc.)
- Choose the Ownership of this Lead among the Users



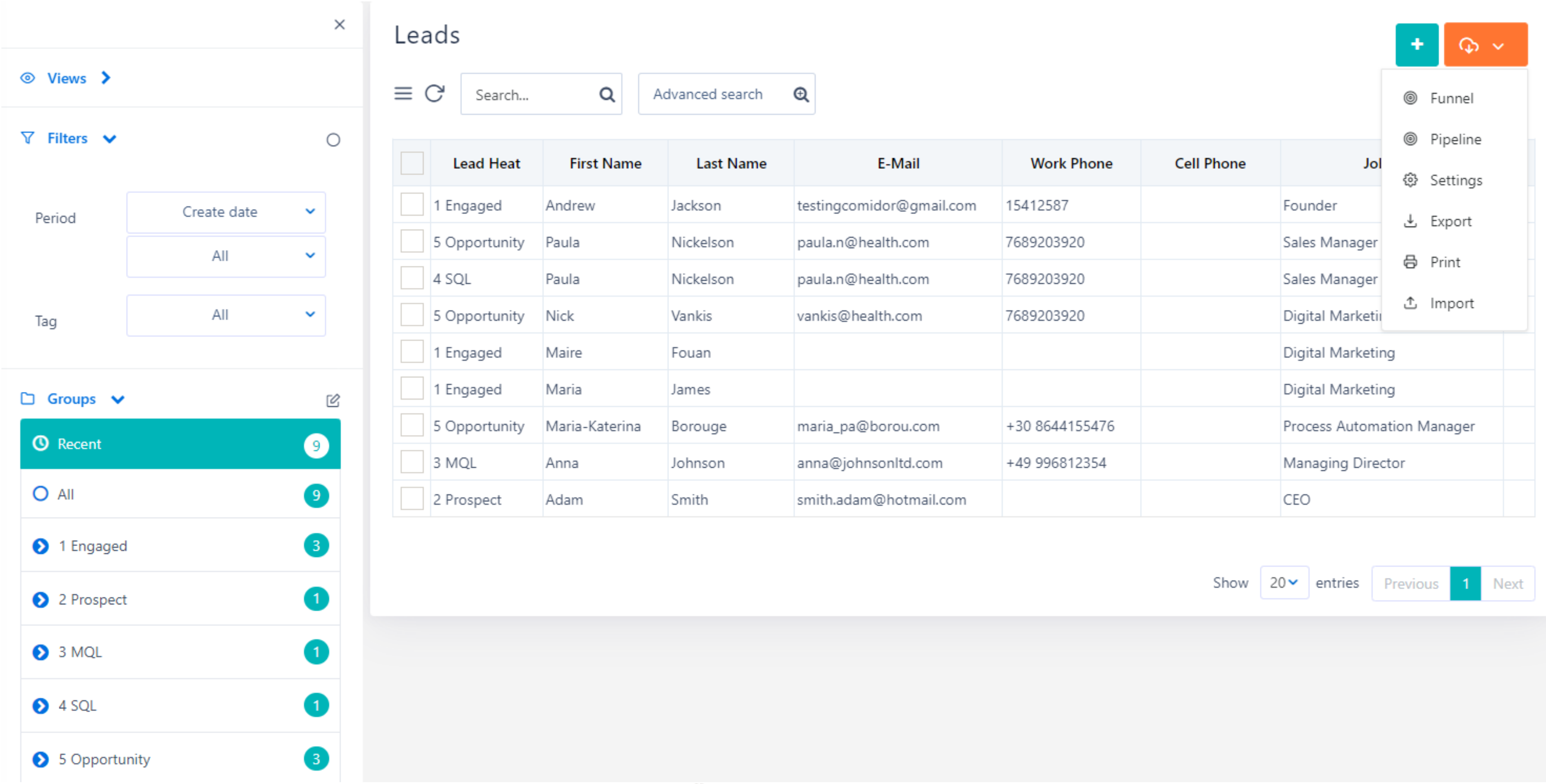
View a lead

- After saving a lead record, you can view its details.
- Add any comments related to this record in the comments section.
- Link this lead record with other records such as Emails, documents, processes, etc.

Find out more here.

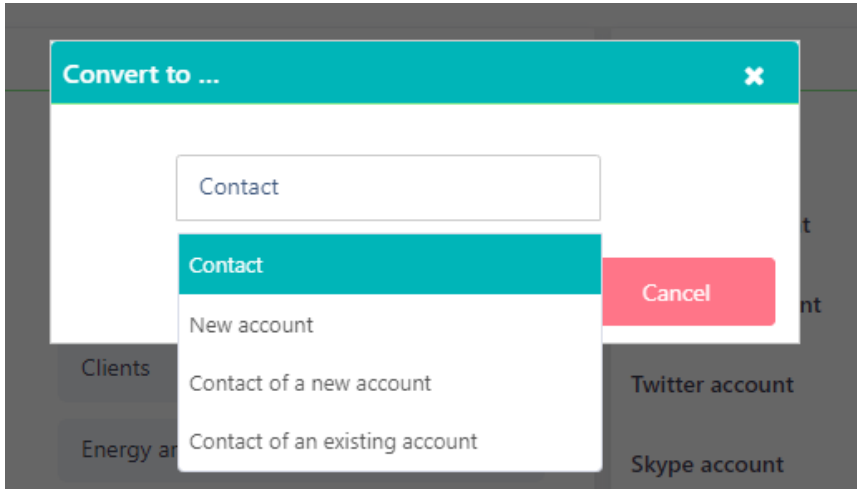
Manage Leads

View all your leads, use the search functionality, filters and grouping in the Comidor Leads Unit.



Convert a lead

- Convert the specific Lead to a new account with all the Lead's information.
- Convert to a new contact, changing the specific Lead to a contact with all of the Lead's information.
- Convert to Contact of a New Account to create a new account.
- Contact of an existing Account to change the lead to contact and link it with an existing account.

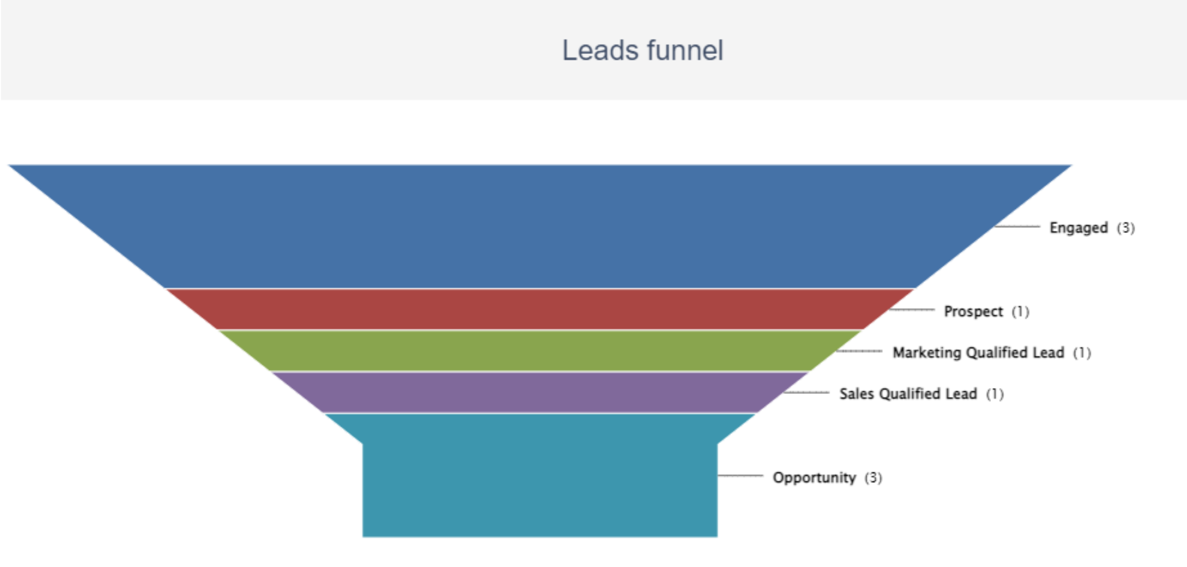


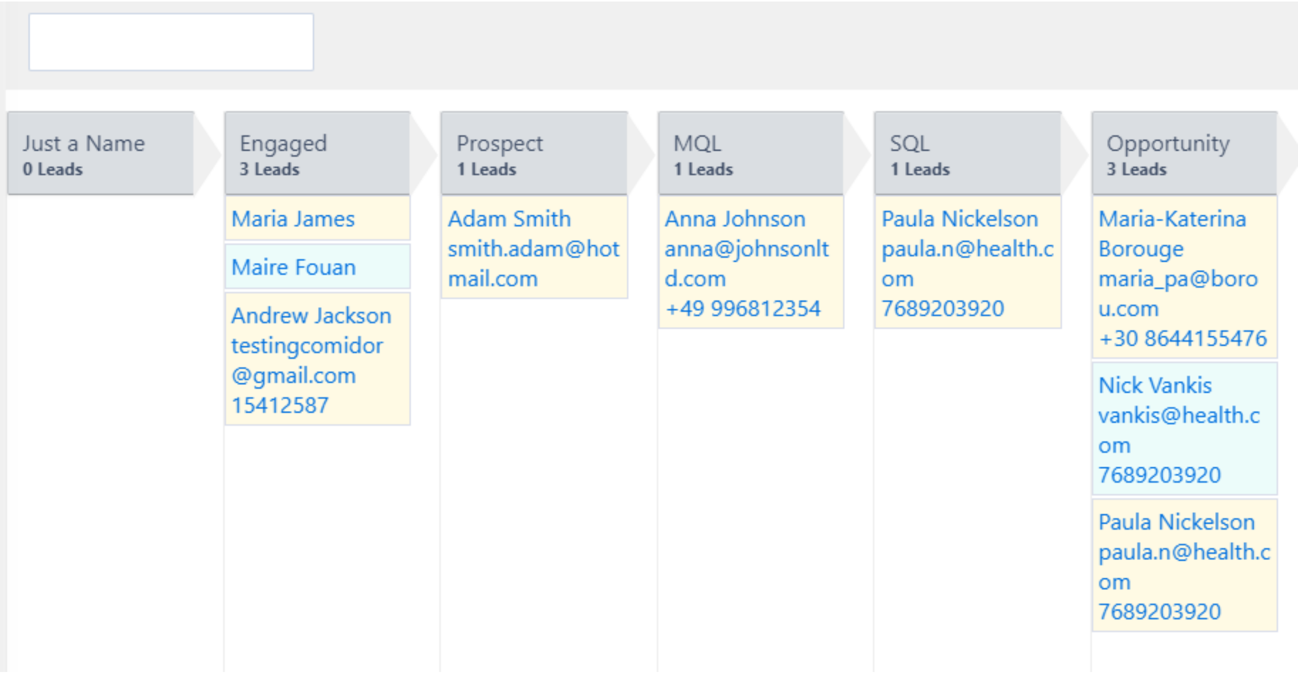
Find out more here.

Lead Reports

Funnel: Users can view their leads according to the status of Lead heat in a funnel graph. The Leads will be displayed according to the status of the Lead heat in the funnel graph.

Pipeline: View your leads according to the Lead Heat status you have set. At this point, the leads appear according to the Lead Heat status.





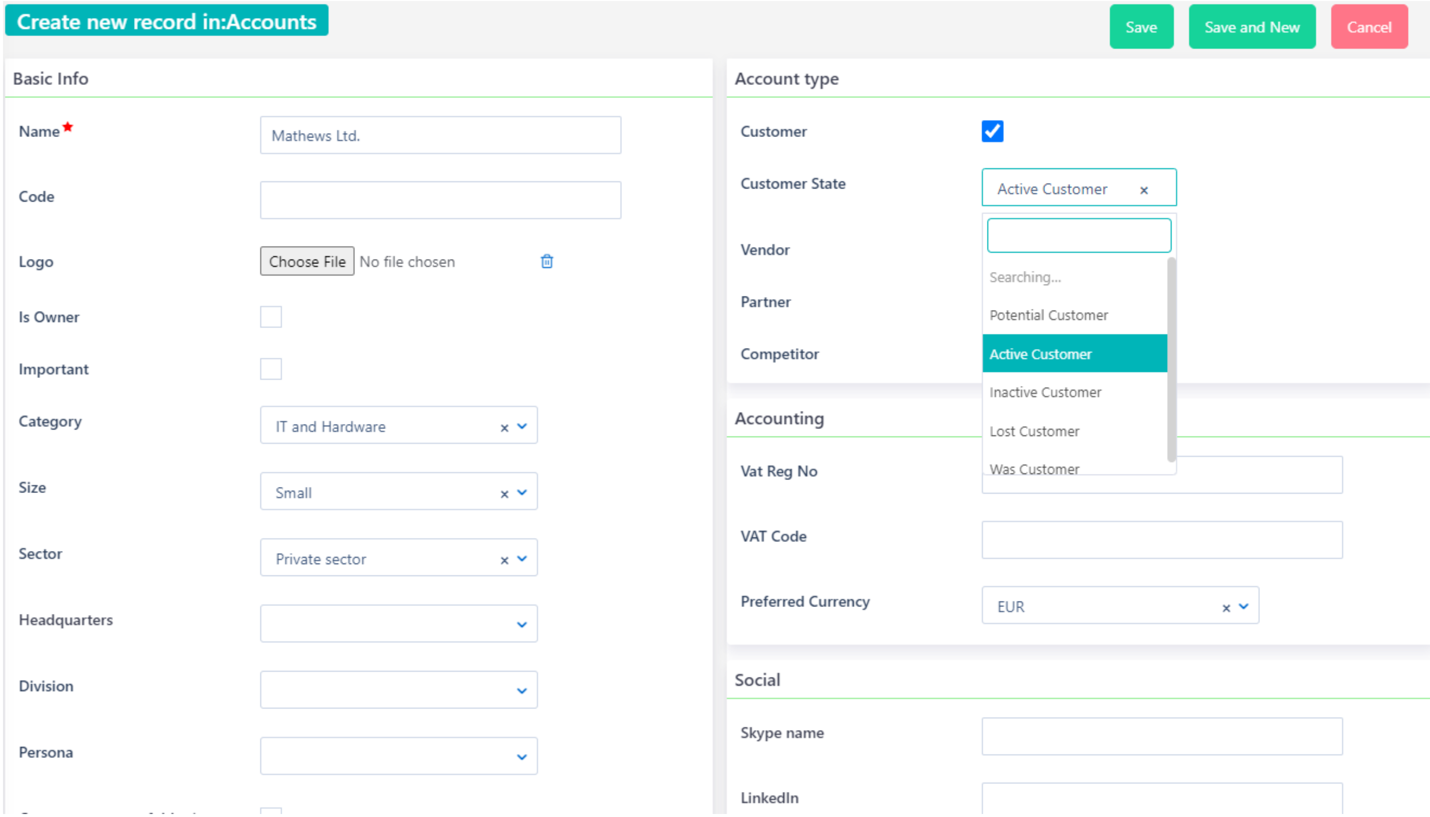
[Find out more here.]()

Accounts

Comidor Accounts refers to objects related to your business, such as customers, vendors, partners, and competitors. It enables a 360-degree approach for managing all these entities.

Create a new Account

- Add basic info such as Name, Code, Logo, Category, etc.
- Specify the Account type – Customer, Vendor, Partner and the status (potential, active, etc.)
- Define the contact information (phone, email, etc.) and address (shipping, billing)
- Add accounting info
- Choose the Owner of this account among the Users



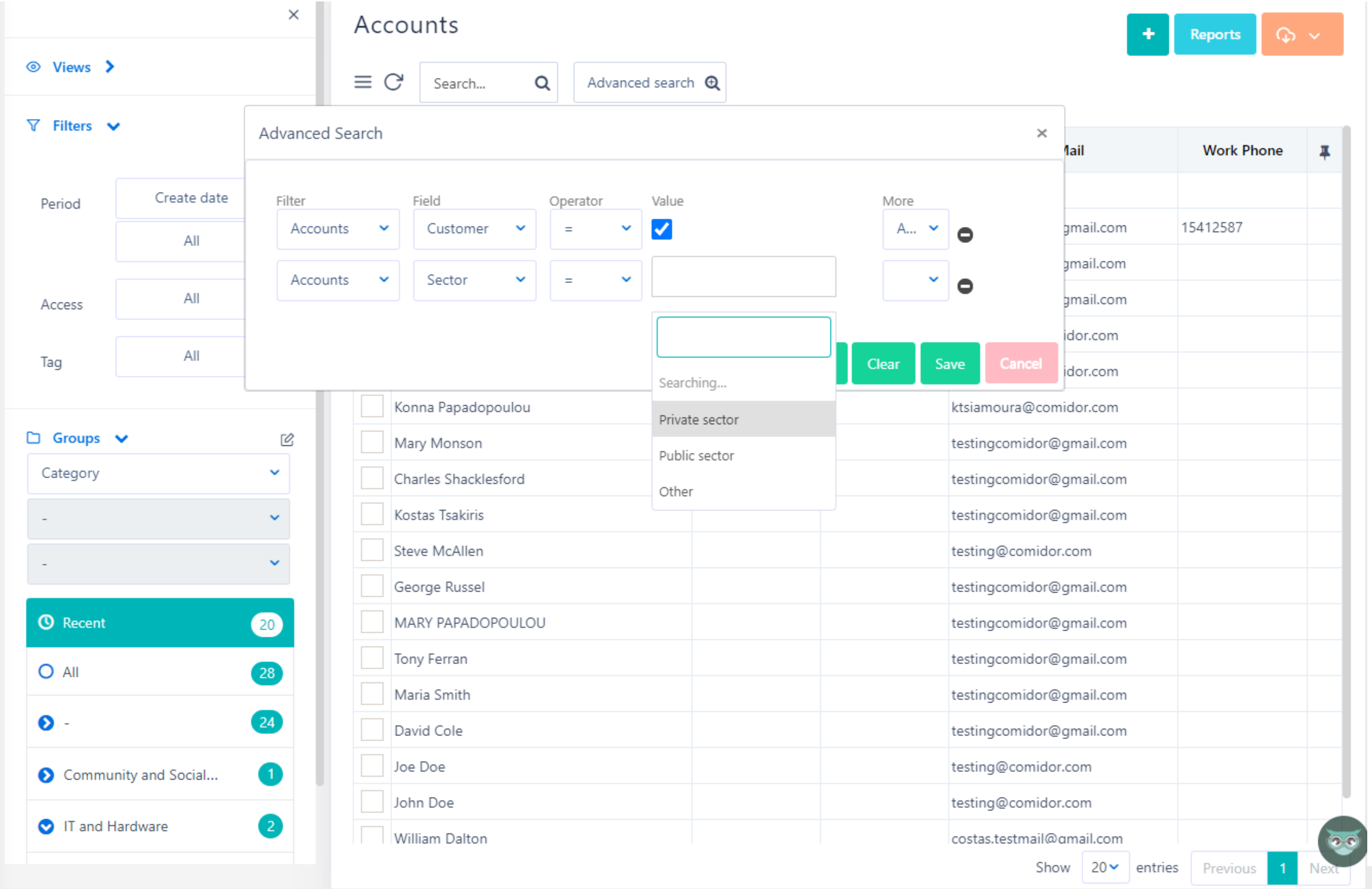
View an account

- After saving an account record, you can view and edit its details.
- Add any comments related to this record, in the comments sections.
- Link this lead record with other records such as Emails, documents, processes, etc.

[Find out more here.]

Manage Accounts

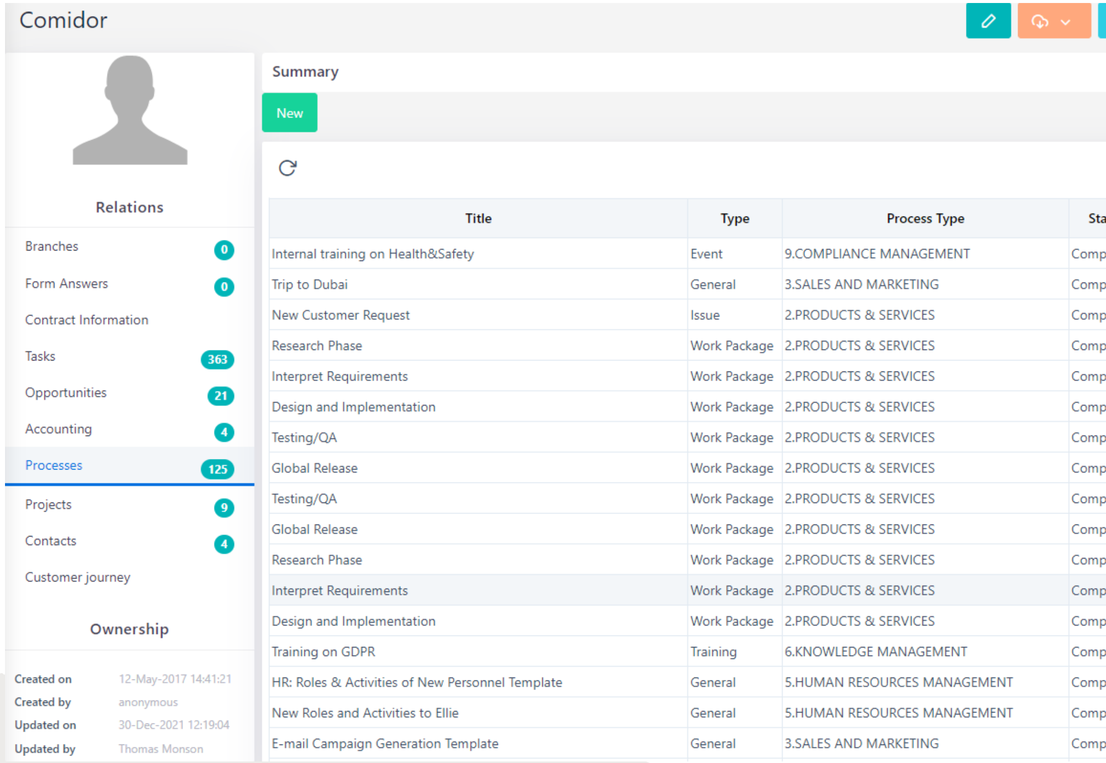
View all your accounts, use the search functionality, filters, and grouping in the Comidor Accounts table Unit.
Make advanced searches and save them for quick access.



[Find out more here.]

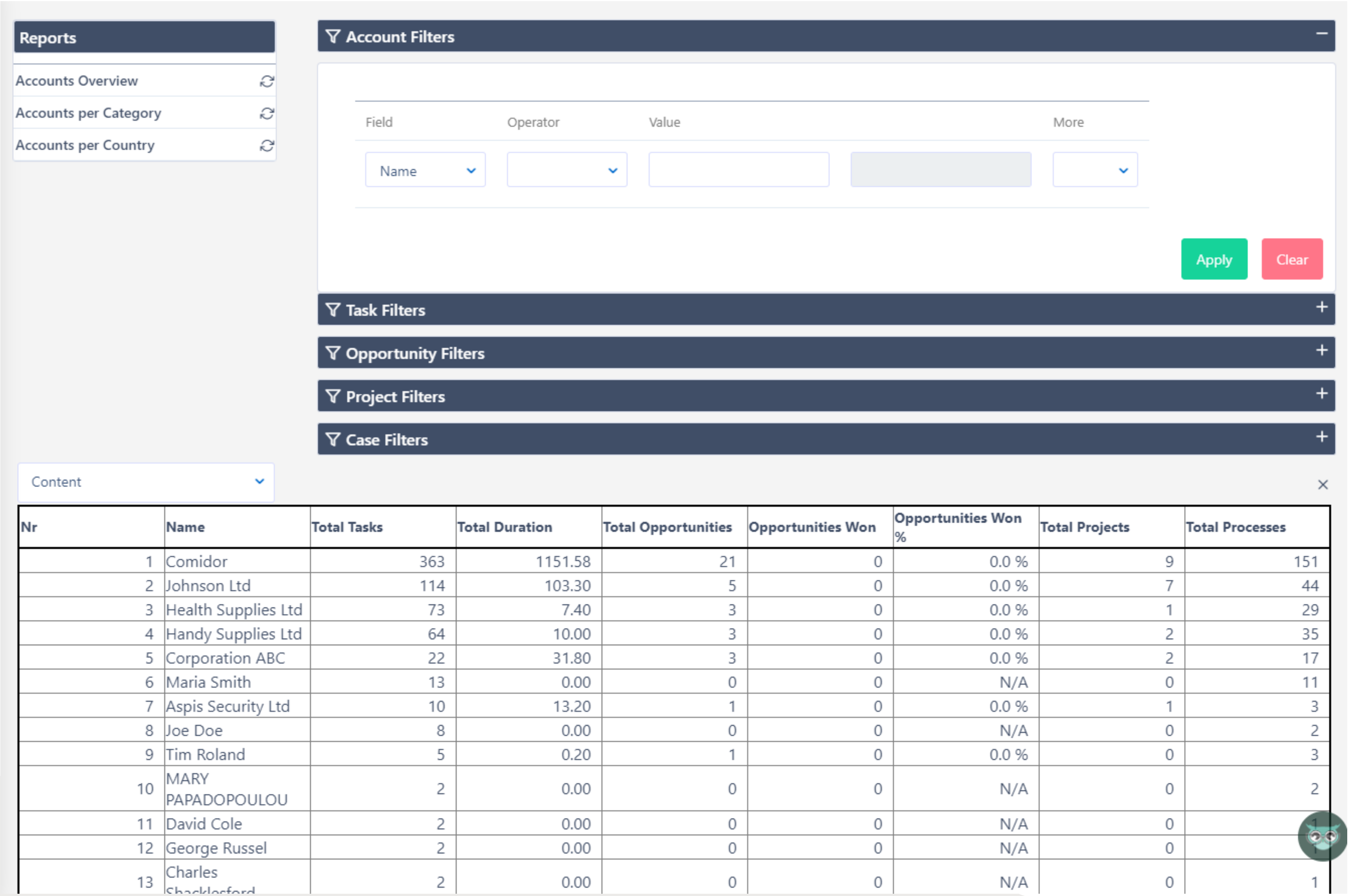
Relations in an Account

- See all branches (other accounts) of an account
- View previously added Projects, Tasks, Contacts, Opportunities or Processes linked to this account, or add new ones.
- See the accounting information for this account, which includes all Income and Expenses that have been added and approved.



Account Reports

- In Account Reports, you can view previously created Reports, such as the Account Overview, Account per Category, or Accounts per Country.
- You can then apply multiple filters depending on the selected Report and view the results in a Content or Graph view.
- You can also Print or Export the results.



Nr	Name	Total Tasks	Total Duration	Total Opportunities	Opportunities Won	Opportunities Won %	Total Projects	Total Processes
1	Comidor	363	1151.58	21	0	0.0 %	9	151
2	Johnson Ltd	114	103.30	5	0	0.0 %	7	44
3	Health Supplies Ltd	73	7.40	3	0	0.0 %	1	29
4	Handy Supplies Ltd	64	10.00	3	0	0.0 %	2	35
5	Corporation ABC	22	31.80	3	0	0.0 %	2	17
6	Maria Smith	13	0.00	0	0	N/A	0	11
7	Aspis Security Ltd	10	13.20	1	0	0.0 %	1	3
8	Joe Doe	8	0.00	0	0	N/A	0	2
9	Tim Roland	5	0.20	1	0	0.0 %	0	3
10	MARY PAPADOPOULOU	2	0.00	0	0	N/A	0	2
11	David Cole	2	0.00	0	0	N/A	0	1
12	George Russel	2	0.00	0	0	N/A	0	1
13	Charles Shacklesford	2	0.00	0	0	N/A	0	1

[Find out more here.]

Contacts

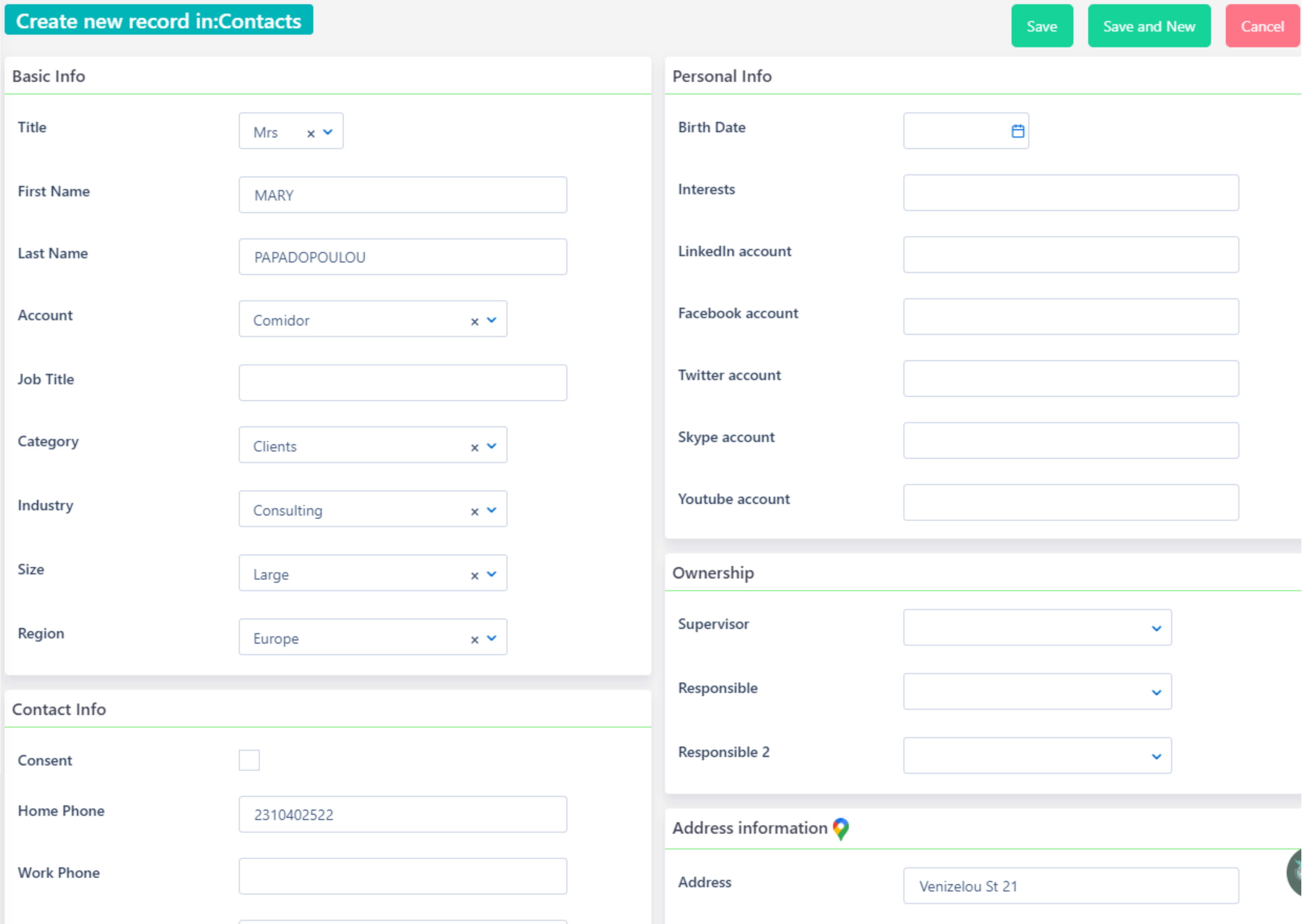
Comidor Contacts facilitates your Contact management, Communication, and Collaboration with these Contacts.
Comidor offers options to categorize and manage contacts more efficiently, send group emails internally and externally and email a form (e.g., questionnaire) to conduct survey.

Create a new Contact

- Add basic info such as Title, First Name, Last name, etc.
- Link your Contact with an already existing Company (Account)
- Define the contact information (address, email, etc.)
- Choose the Owner of this Contact among the Users

View a Contact

- After saving a contact record, you can view its details.
- Add any comments related to this record, in the comments section.
- Link this record with other records such as Emails, documents, processes, etc.



[Find out more here.]

Manage Contacts

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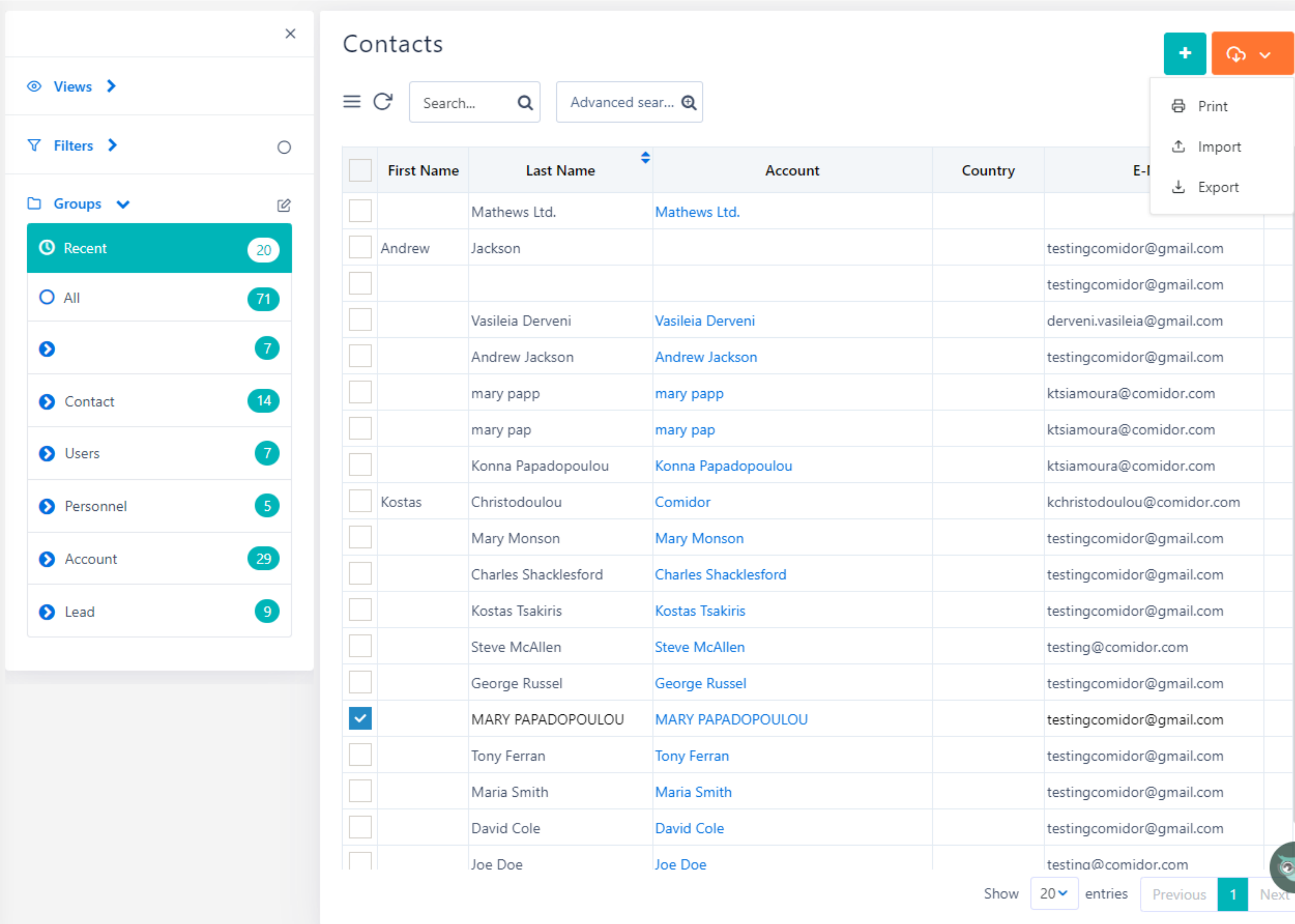
View all your contacts, use the search functionality, filters and grouping in the Comidor Contacts table Unit.
Make advanced searches and save them for quick access.

- See all contact records grouped per Type:
    - Contacts
    - Users
    - Personnel
    - Accounts
    - Leads
    - Candidates

- Combine Comidor Workflows to automatically insert/update/delete records in the Contacts table.



[Find out more here.]

Opportunities

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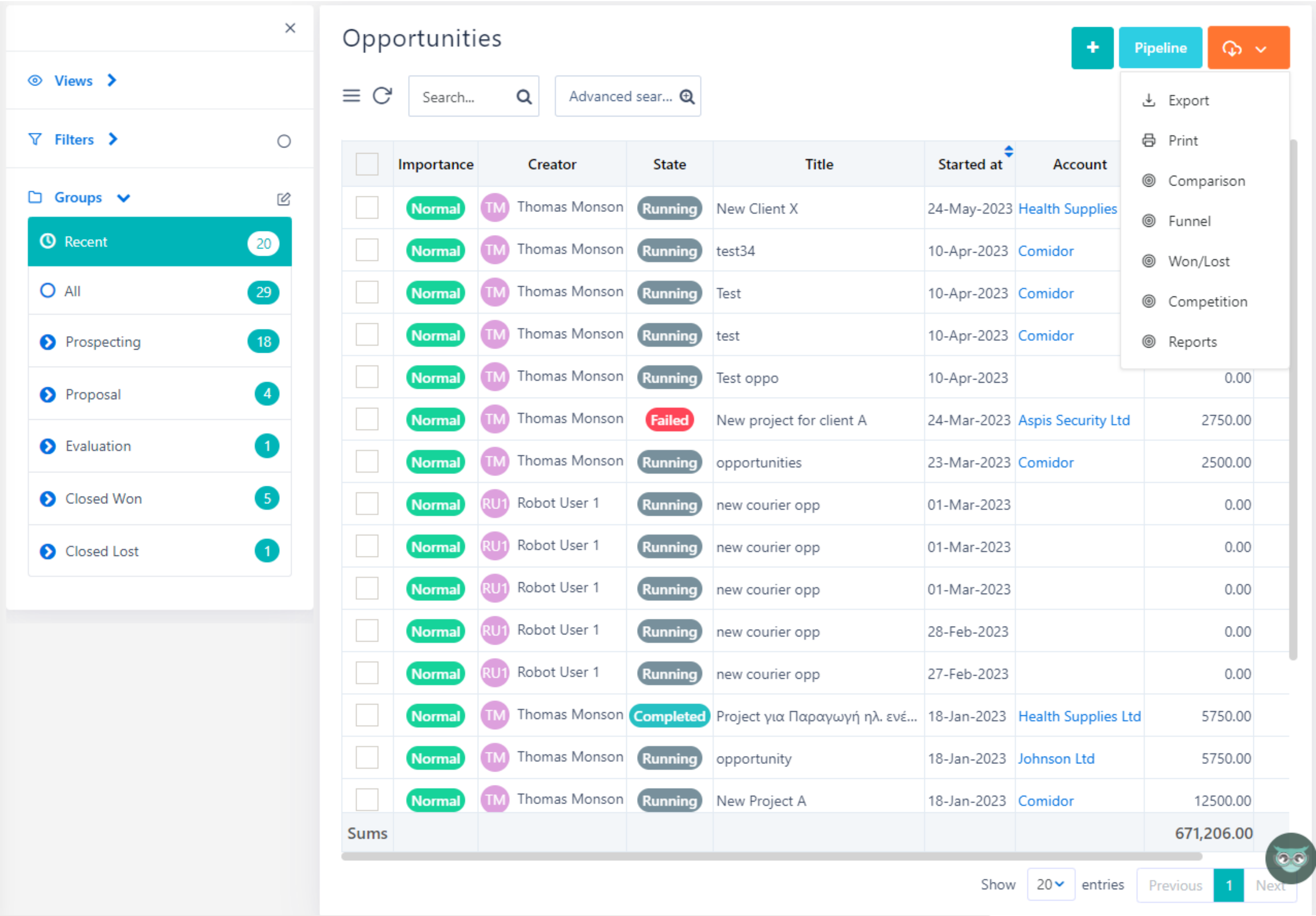
Comidor Opportunities allow in-depth monitoring of potential deals, giving you the chance to check tenders, track how many opportunities your sales team has converted to actual sales, and monitor your potential deals.

View all of your Opportunity processes, use the search functionality, filters and grouping in Comidor's Opportunities Unit.



[Find out more here.]

Manage Opportunities

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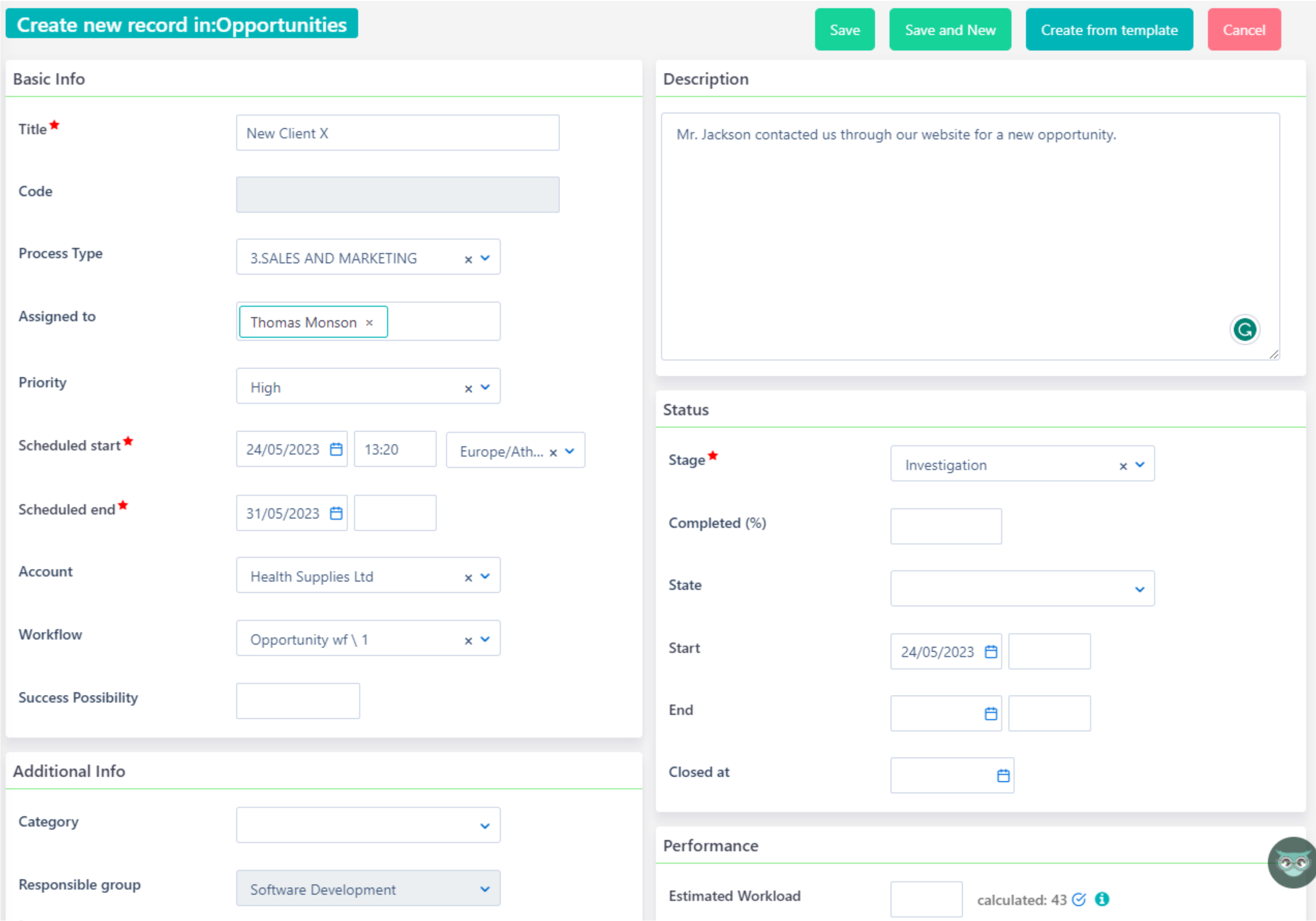
Create an Opportunity

- Add basic info such as Title, Process type, priority, etc.
- Link an account, contact person, and workflow diagram.
- Provide a description of this Opportunity
- Define the status (stage, start/end dates)
- Add the financial information

View an Opportunity

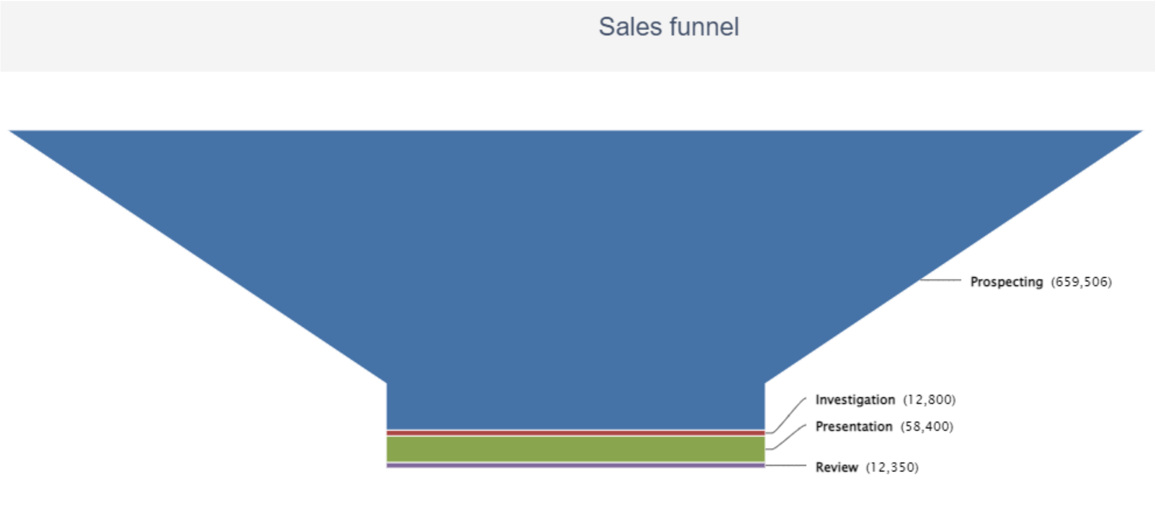
- After saving a record, you can view and edit its details.
- Change the Opportunity stage(Prospecting, Closed won, Lost, etc.) and process state (Running, Cancelled, Failed, etc.).
- Add manual tasks related to all sales activities or view the workflow tasks.
- Add any comments related to this record, in the comments section.
- Link this record with other records such as Emails, documents, processes, etc.



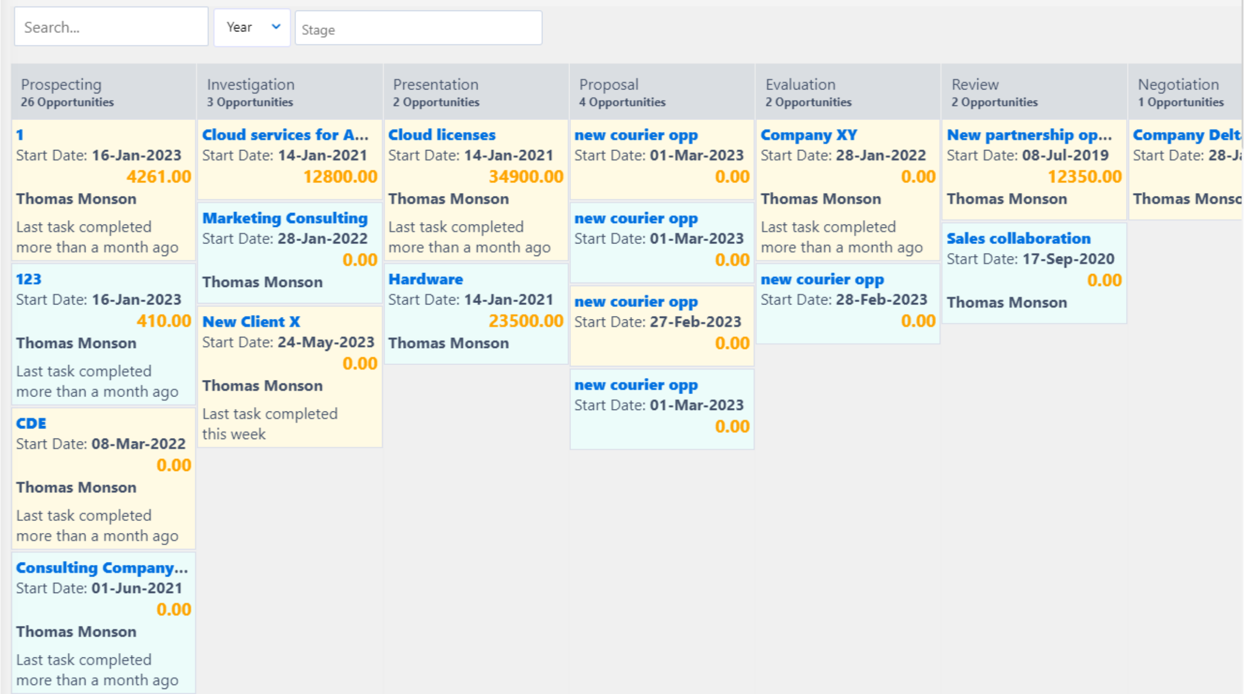
[Find out more here.]

Opportunity Reports

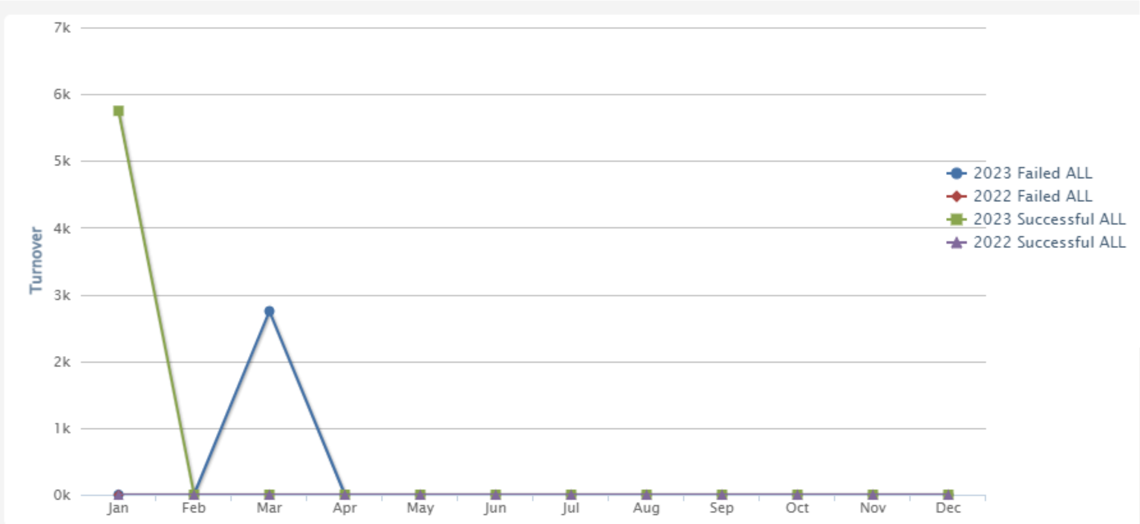
Funnel: Users can see the Opportunities' Stages funnel with the expected income sums.



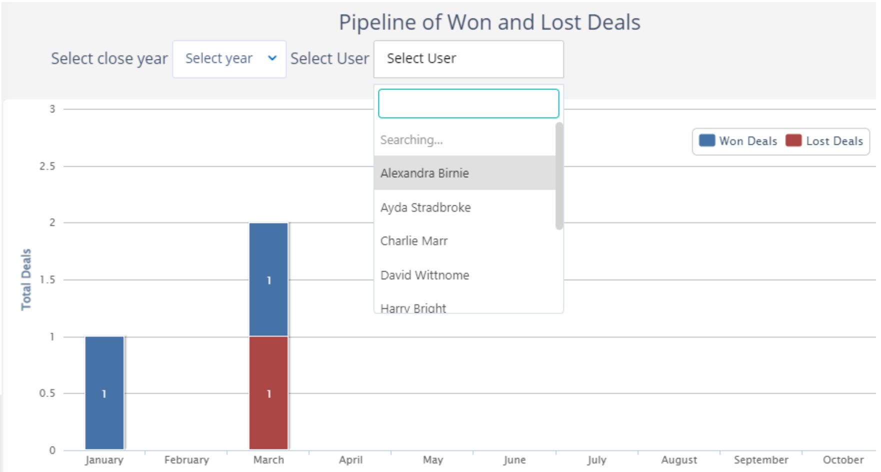
Pipeline: View your Opportunities according to the stage you have set.



Comparison: Compare Successful and Failed Opportunities per user and per year.



Won/Lost: a pipeline of all the Won and Lost Opportunities per year and per user.



[Find out more here.]

Business Process Definition

- **Business Process** refers to a set of activities or tasks, often connected and automated, triggered by an event to carry out a predetermined specific organizational goal such as a service or a product.
- Each activity(e.g., a task), included in a process, is assigned to a specific member of a team or to an entire group of the business.
- Every business should define its processes, analyze and measure the results to ensure that the process is meeting expectations and is getting better.
- Usually, when a process has pre-defined and same steps, these activities can be visualized as a **workflow.** A workflow is the orchestration of connected stages that can be performed in parallel or sequentially depending on specific rules or decisions. That means that every person in the company should follow the exact same steps.

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Find out more here.

BPMN 2.0

BPMN (Business Process Modelling Notation) is a graphical notation that captures the logical steps of a business process. The notation established describes the flow sequence while participants collaborate upon process completion.

- BPMN was developed by Business Process Management Initiative (BPMI) which was merged with **Object Management Group (OMG)** in 2005.
- BPMN 2.0 was released in 2011.
- BPMN is internationally accepted.
- Processes are standardized in a unique way, understandable by all; from business analysts to any stakeholder.
- Business Analysts use **BPD (Business Process Diagrams)** to design, control and manage processes.
- BPMN **bridges gap between process design and implementation**, between business and tech professionals.
- Each BPMN object layers a defined XML definition, which makes it functional.
- Processes require modeler to use some very common objects (events, activities, gateways) and sequence flows.

Source: OMG(2011), Business Process Model and Notation (BPMN) v 2.0

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Key BPMN 2.0 diagram elements and symbols

Flow objects: events, activities, gateways

Data: data objects, data inputs, data outputs, data stores

Connecting objects: sequence flow, message flow, association, data association

Swim lanes: pool or lane

Artifacts: group, text annotation, annotation

RPA components

AI components

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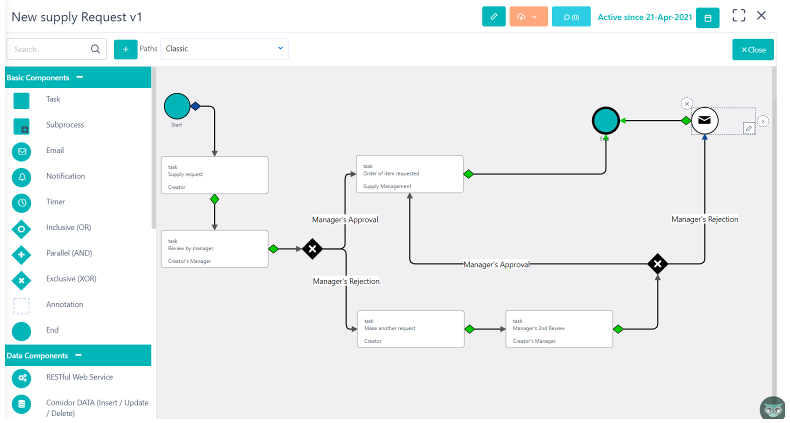
Find out more here.

Workflow Designer

With Comidor BPMN 2.0 designer, you can map and optimize any process occurring in your company.

Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through the Workflow Designer, users can navigate and modify existing processes or create new ones using BPMN 2.0 with drag-and-drop functionality.

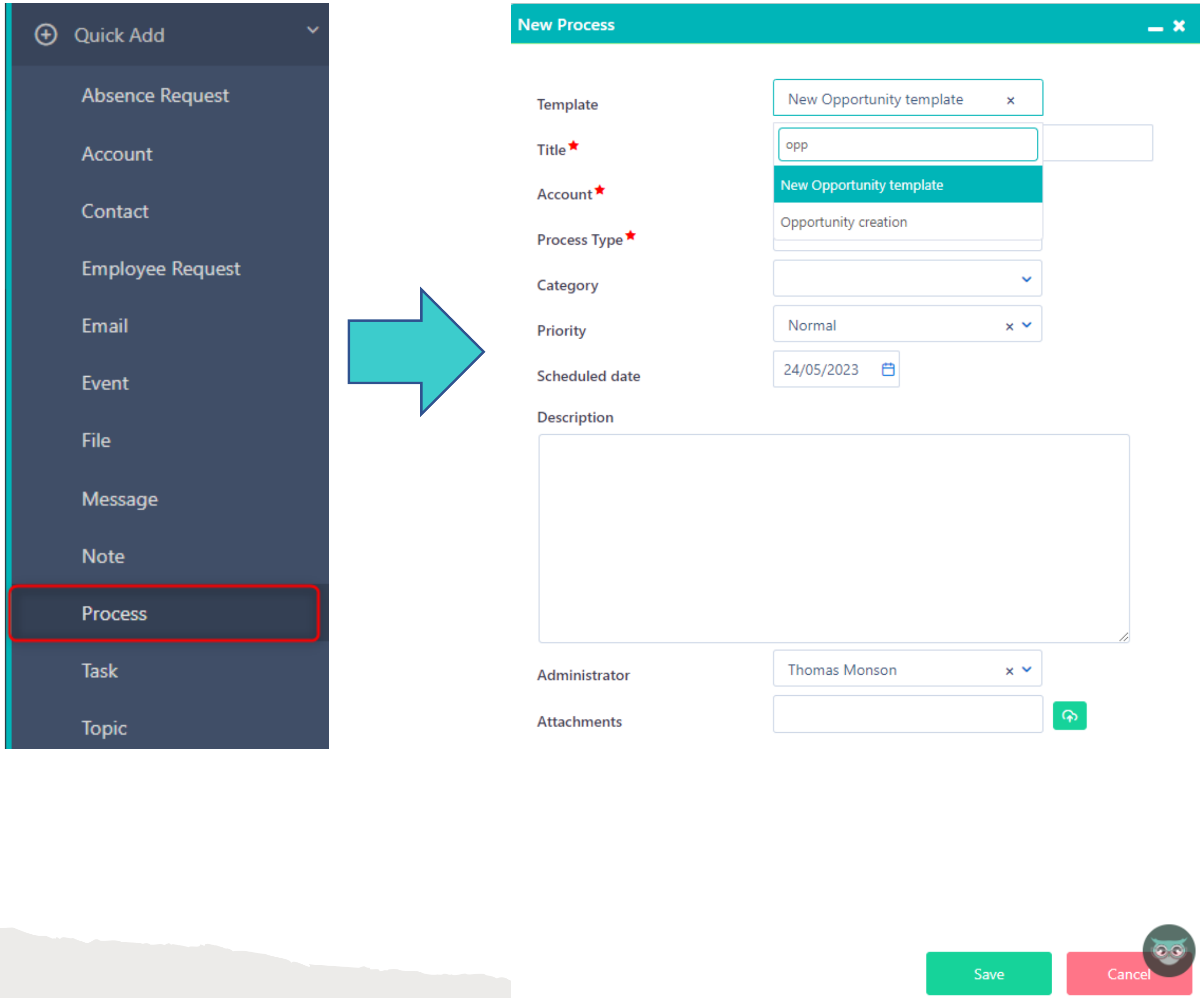


Process Templates

- Set up Opportunity Templates in the [*Process Templates*] unit. Have an Opportunity as a template and duplicate it or apply its structure to newly created Opportunities.

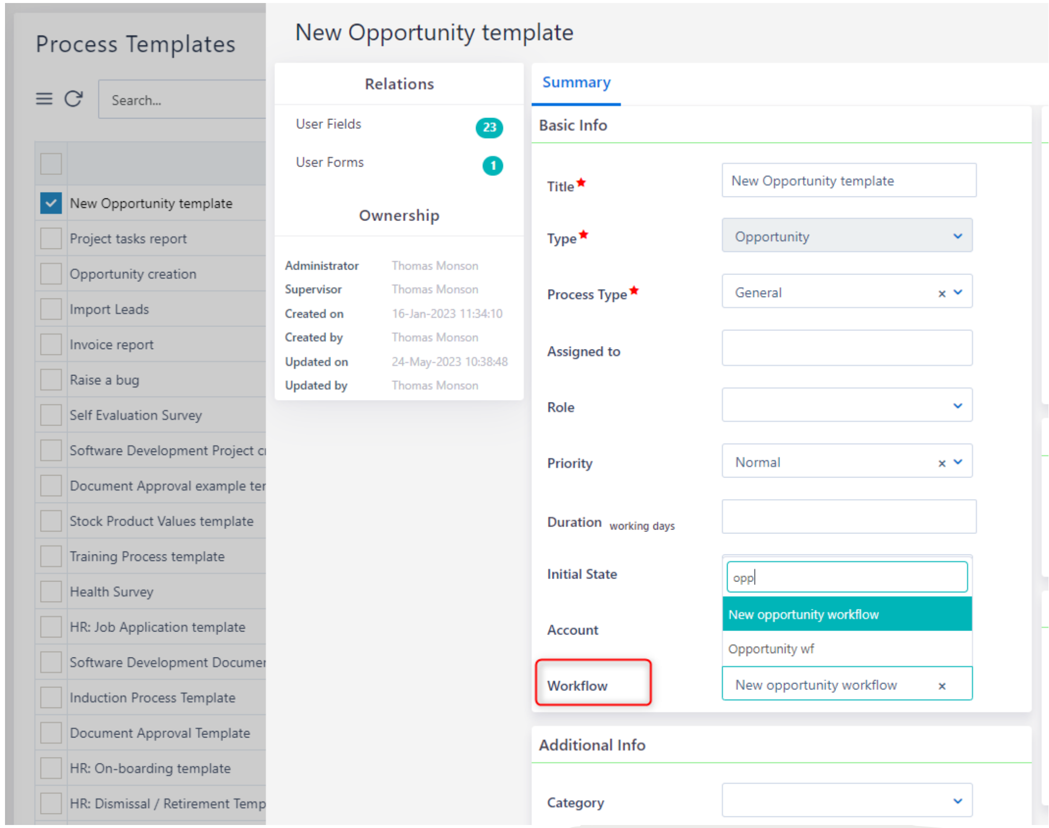
- Go to the **Quick add** menu> Process and choose the desired template from the list.

- Repetitive Opportunities can be created, reused and monitored through the Scheduling unit. These Processes/Opportunities are usually connected to Opportunities that follow a specific Workflow.

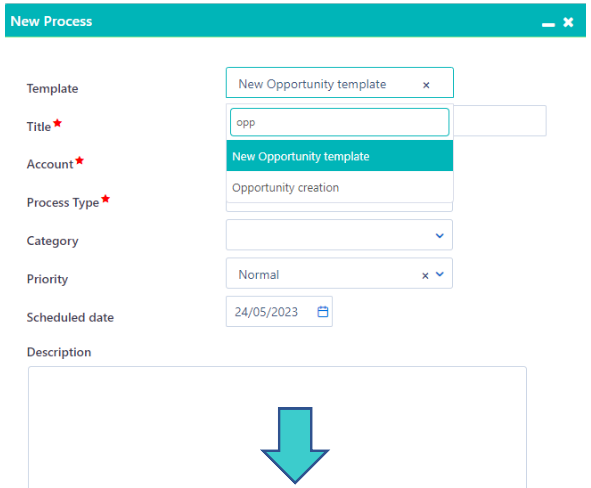


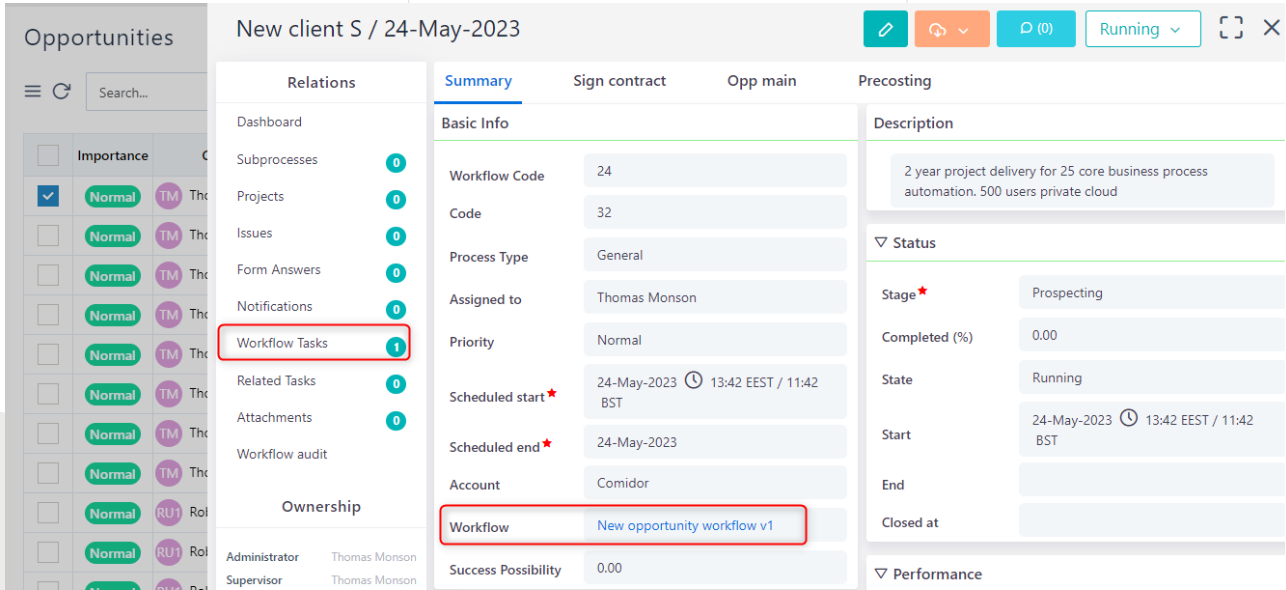
Process Template with Workflow

- Process Templates can also be connected to Processes that follow a specific *Workflow*.



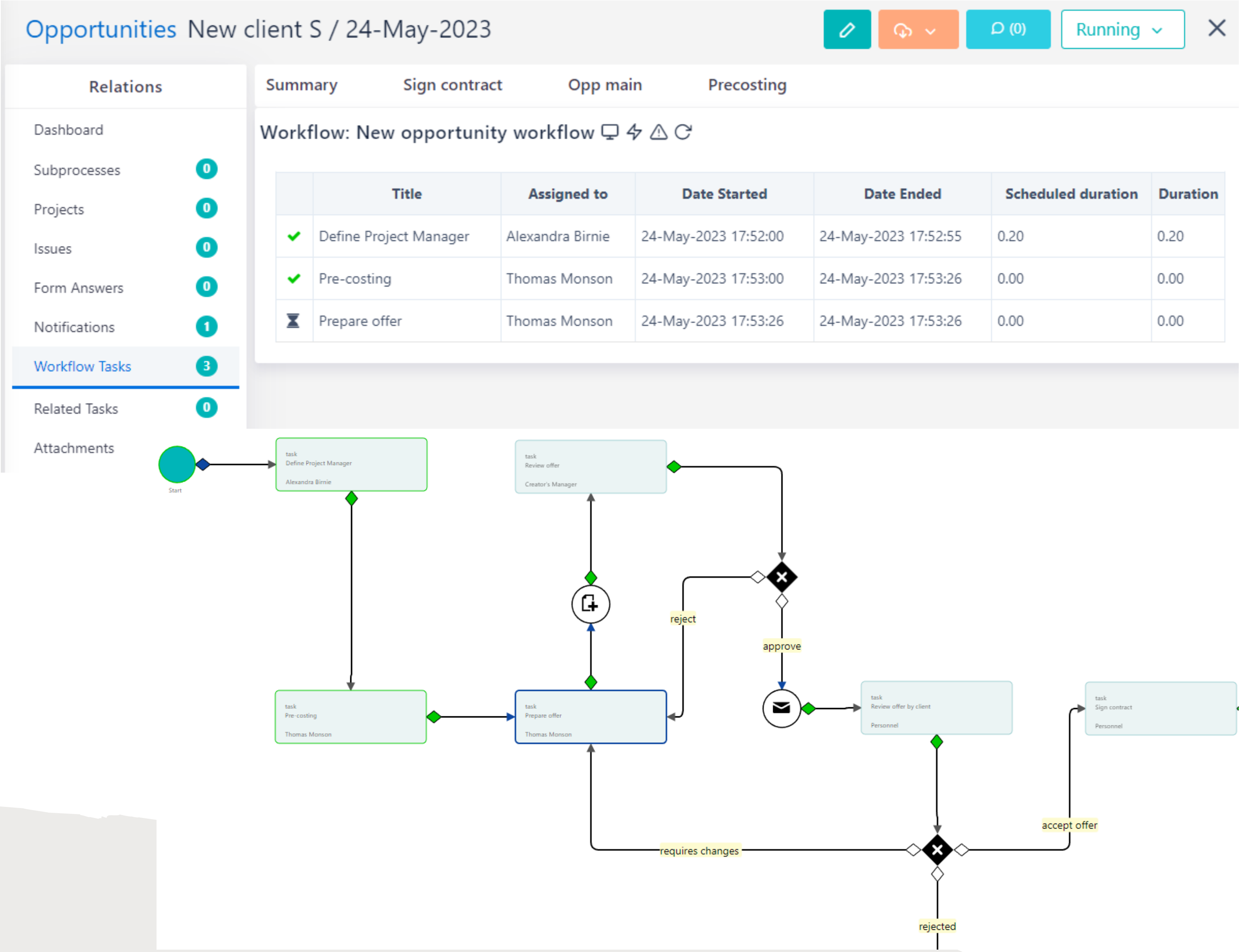
- In this way, whenever a user initiates a new process using a Template, all the parameters defined within the template (process type, assignees, scheduling, priority, workflow) are included in the new record.





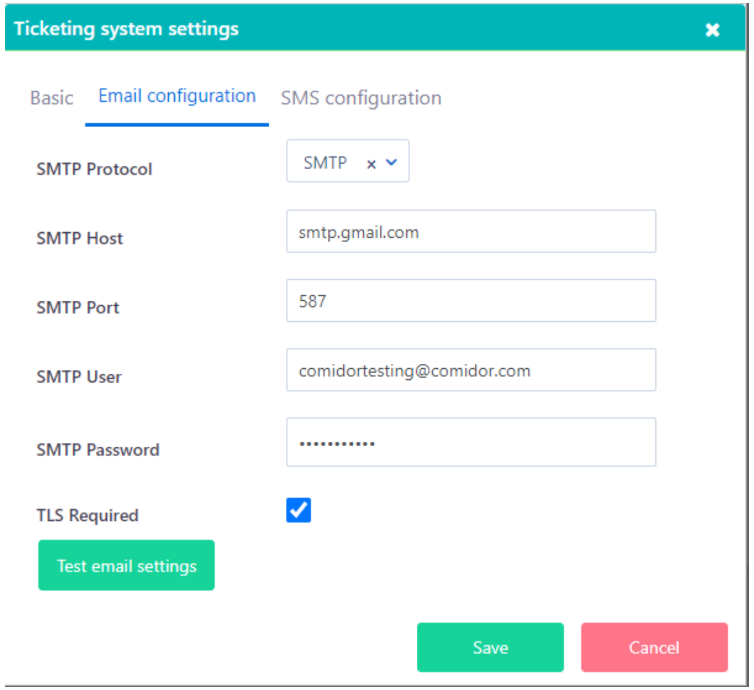
Opportunity with Workflow

- In Opportunities with pre-defined, repetitive steps, we can use a workflow to automatically populate tasks and other activities.
- Through a workflow:
  - We define the activities, their sequence, and all alternative paths
  - Add decisions and business rules to automatically alter the stage and state of the opportunity
  - Automatically insert records in other tables (e.g. insert Account, insert a Project, etc.)
  - Automatically produce digital documents and send them via email
- In the Workflow Tasks tab, you can monitor the progress of this opportunity and the tasks that have been created thus far.
- On the run diagram, you can see the path that is followed and the upcoming steps of the flow.

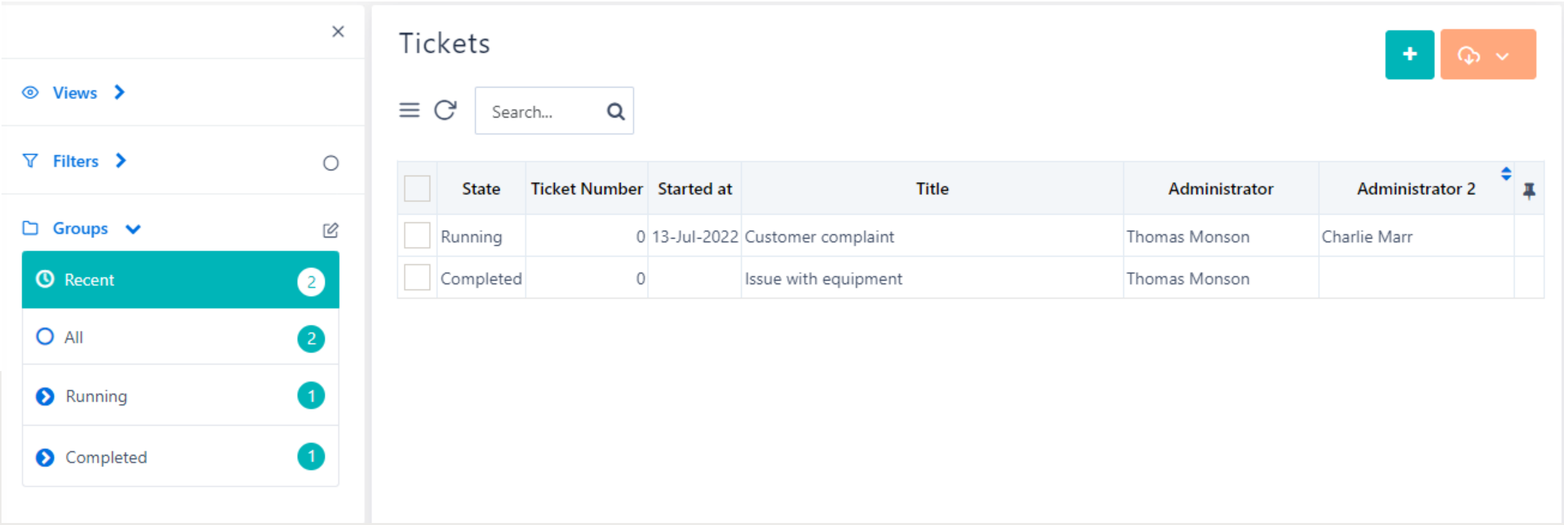


Tickets

Comidor's Ticketing system can help organizations handle their Issues and monitor the progress of their resolving. Tickets are processes through email and can also be linked with workflows.



- Create and manage tickets with Comidor Ticketing system and monitor the progress of their resolution path.



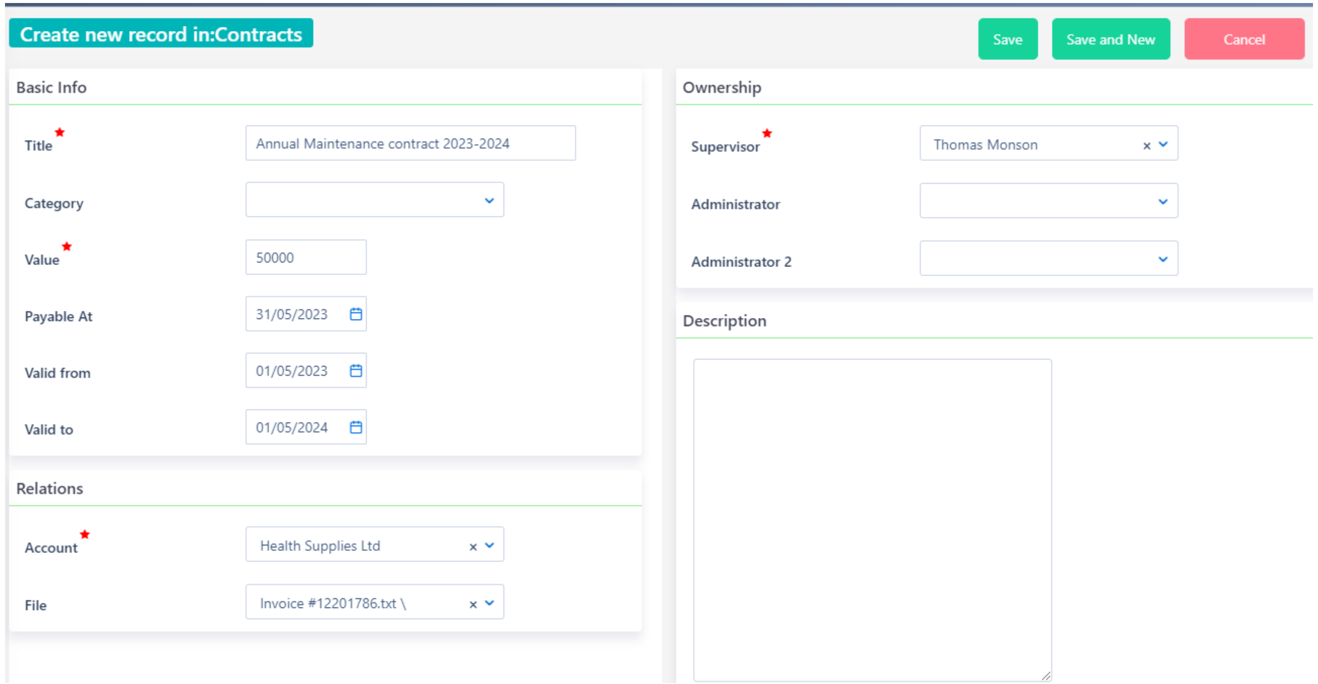
Find out more here.

Contracts

The Comidor Contracts Unit helps your business organize any kind of contract, whether with your clients or not.
All Contracts can be categorized according to users' needs and can also be related to several Comidor entities.

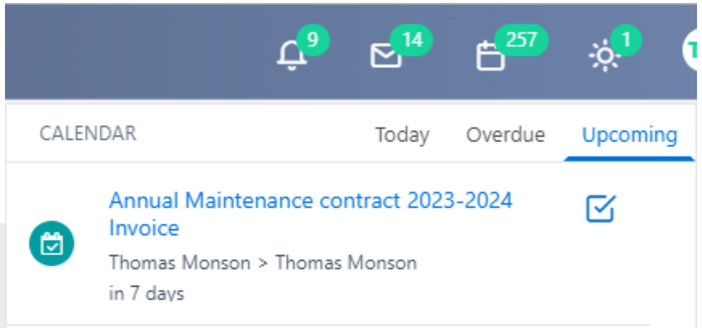
Create a new Contract

- Add basic info such as Title, Category and Description.
- Define the value of the contract and the period of its validity.
- Link your record with an Account and File from DMS or upload related attachments.
- Choose the Owner of this Contract among the Users



View and Invoice a Contract

- After saving a new record, you can view and edit its details.
- A notification and task is sent to the Owner of this record
- Add any comments related to this record, in the comments section.
- Link this record with other records such as Emails, documents, processes, etc.



[Find out more here.]

Thank you!