



# **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.

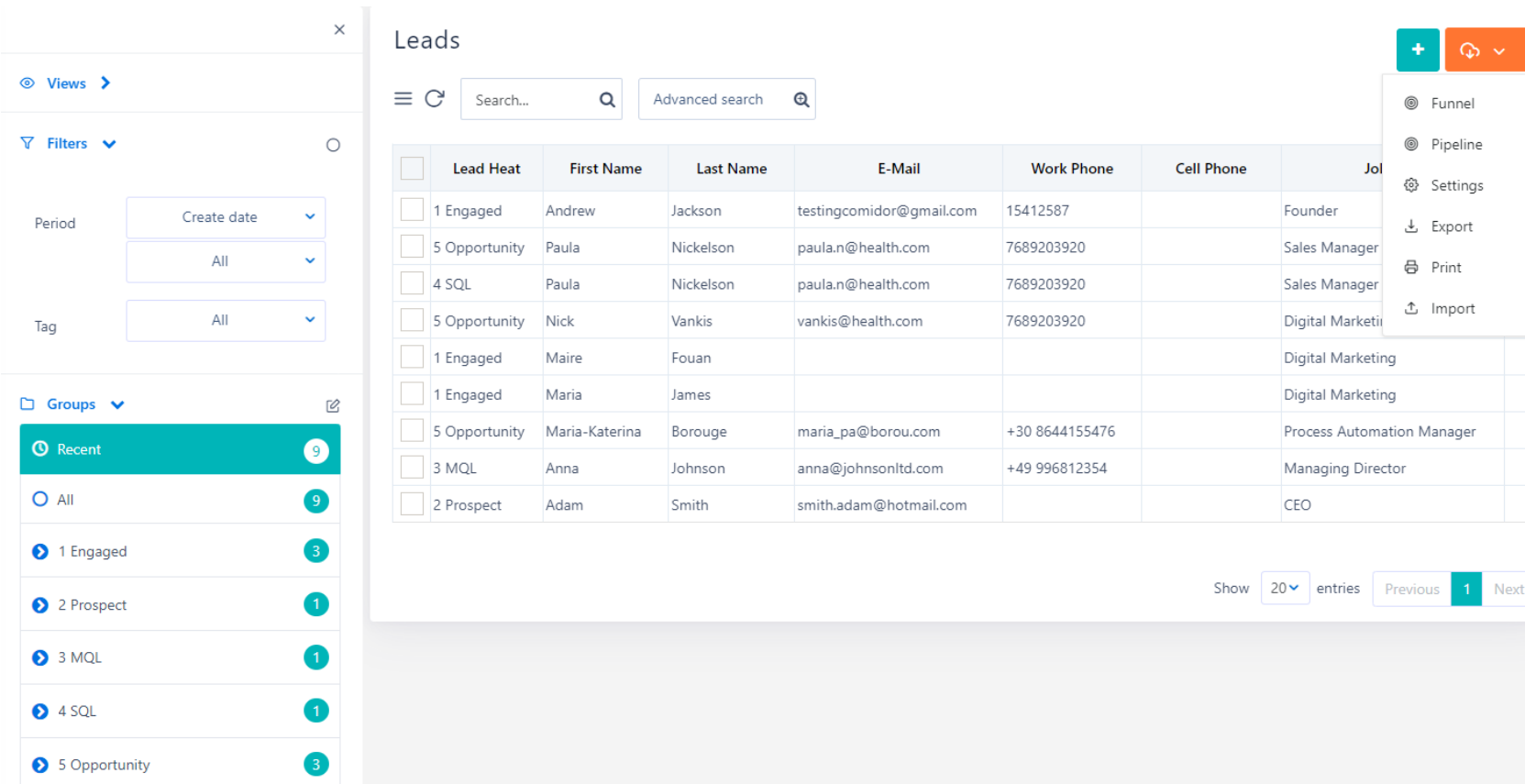
A screenshot of the Comidor web application's "Create new record in Leads" form. The interface has a dark blue sidebar on the left with various icons. The main content area is divided into two columns. The left column, titled "Basic Info", contains fields for Title (Mr), First Name (Andrew), Last Name (Jackson), Lead Heat (1 Engaged), Account, Company (Corp SA), Job Title (Founder), Category (Clients), Industry (Energy and Oil), Size (Small), Region, Product (PROD-X \ ProductX), and Demo Date. The right column, titled "Personal Info", contains fields for Birth Date, Skype account, LinkedIn account, Facebook account, Youtube account, and Twitter account. Below these is the "Ownership" section with fields for Supervisor, Responsible, and Responsible 2. At the bottom is a "Description" section with a text area. At the top right of the form are "Save", "Save and New", and "Cancel" buttons. The top of the application shows a navigation bar with a menu icon, "Help", and several status icons.

[Find out more here.](#)



# Manage Leads

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

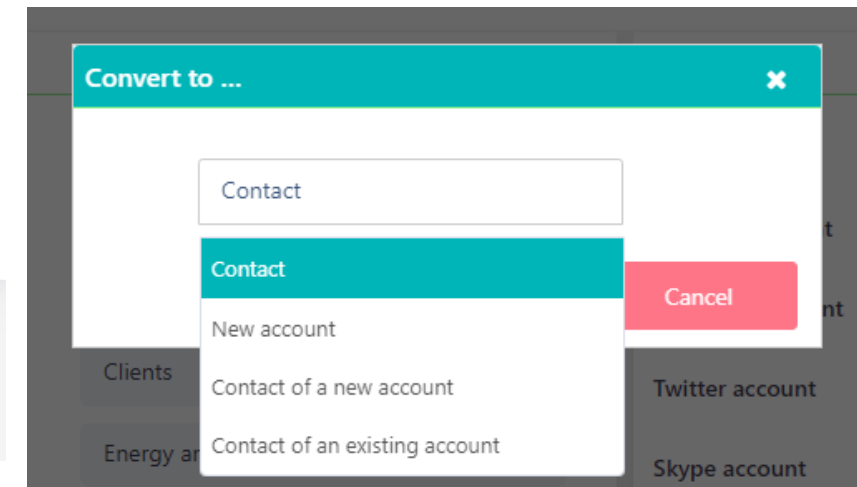


The screenshot shows the Comidor Leads Unit interface. On the left, there are filters for 'Views', 'Filters', and 'Groups'. The 'Filters' section includes 'Period' (Create date, All) and 'Tag' (All). The 'Groups' section shows 'Recent' (9), 'All' (9), '1 Engaged' (3), '2 Prospect' (1), '3 MQL' (1), '4 SQL' (1), and '5 Opportunity' (3). The main area displays a table of leads with columns: Lead Heat, First Name, Last Name, E-Mail, Work Phone, Cell Phone, and Job. The table contains 10 rows of lead data. A search bar and an 'Advanced search' button are at the top of the table. A dropdown menu is open on the right side of the table, showing options: Funnel, Pipeline, Settings, Export, Print, and Import. At the bottom right of the table, there is a 'Show 20 entries' button and 'Previous 1 Next' navigation links.

	Lead Heat	First Name	Last Name	E-Mail	Work Phone	Cell Phone	Job
<input type="checkbox"/>	1 Engaged	Andrew	Jackson	testingcomidor@gmail.com	15412587		Founder
<input type="checkbox"/>	5 Opportunity	Paula	Nickelson	paula.n@health.com	7689203920		Sales Manager
<input type="checkbox"/>	4 SQL	Paula	Nickelson	paula.n@health.com	7689203920		Sales Manager
<input type="checkbox"/>	5 Opportunity	Nick	Vankis	vankis@health.com	7689203920		Digital Marketing
<input type="checkbox"/>	1 Engaged	Maire	Fouan				Digital Marketing
<input type="checkbox"/>	1 Engaged	Maria	James				Digital Marketing
<input type="checkbox"/>	5 Opportunity	Maria-Katerina	Borouge	maria_pa@borou.com	+30 8644155476		Process Automation Manager
<input type="checkbox"/>	3 MQL	Anna	Johnson	anna@johnsonltd.com	+49 996812354		Managing Director
<input type="checkbox"/>	2 Prospect	Adam	Smith	smith.adam@hotmail.com			CEO

## 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.



The screenshot shows the 'Convert to ...' dialog box. It has a teal header with the text 'Convert to ...' and a close button. Below the header, there is a list of options: 'Contact', 'Contact', 'New account', 'Contact of a new account', and 'Contact of an existing account'. The 'Contact' option is currently selected and highlighted in teal. To the right of the list, there is a red 'Cancel' button. The background of the dialog box is dark gray, and there are some faint labels like 'Clients', 'Energy ar', 'Twitter account', and 'Skype account' visible.

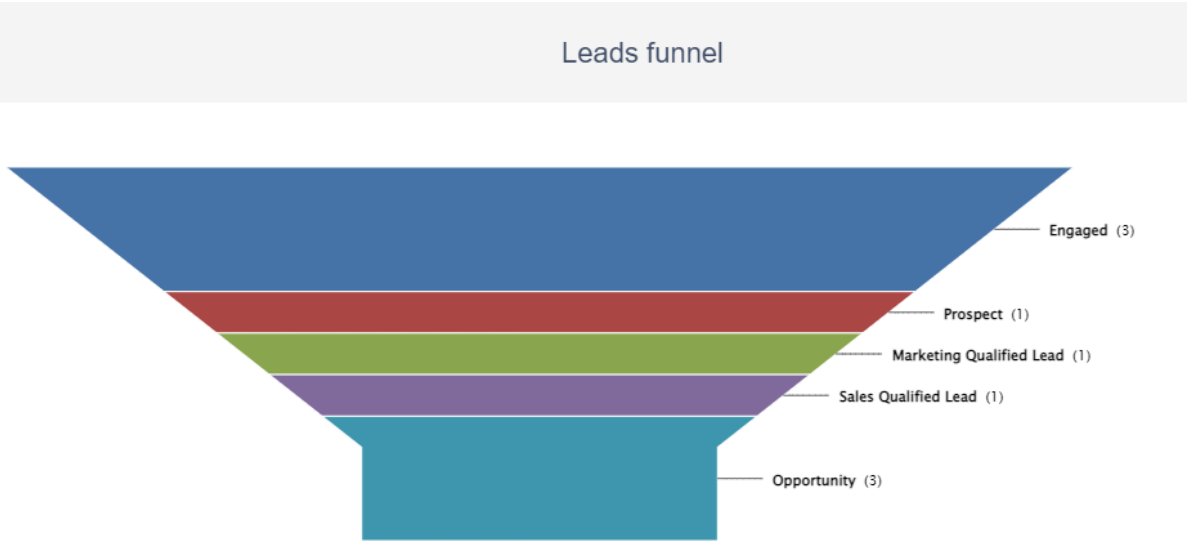
[Find out more here.](#)



# 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.

[Search Bar]					
Just a Name 0 Leads	Engaged 3 Leads	Prospect 1 Leads	MQL 1 Leads	SQL 1 Leads	Opportunity 3 Leads
	Maria James	Adam Smith smith.adam@hotmail.com	Anna Johnson anna@johnsonltd.com +49 996812354	Paula Nickelson paula.n@health.com 7689203920	Maria-Katerina Borouge maria_pa@borou.com +30 8644155476
	Maire Fouan				Nick Vankis vankis@health.com 7689203920
	Andrew Jackson testingcomidor@gmail.com 15412587				Paula Nickelson paula.n@health.com 7689203920

[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.

A screenshot of the "Create new record in:Accounts" form. The form is divided into two main sections: "Basic Info" on the left and "Account type" on the right. The "Basic Info" section includes fields for Name (Mathews Ltd.), Code, Logo (Choose File), Is Owner, Important, Category (IT and Hardware), Size (Small), Sector (Private sector), Headquarters, Division, and Persona. The "Account type" section includes a "Customer" checkbox (checked), a "Customer State" dropdown (Active Customer), a "Vendor" dropdown (Searching...), a "Partner" dropdown (Potential Customer), a "Competitor" dropdown (Active Customer), an "Accounting" section with "Vat Reg No", "VAT Code", and "Preferred Currency" (EUR), and a "Social" section with "Skype name" and "LinkedIn". At the top right, there are buttons for "Save", "Save and New", and "Cancel".

[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.

Views

Filters

Groups

Recent

All

Community and Social...

IT and Hardware

Accounts

Search...

Advanced search

Advanced Search

Filter

Field

Operator

Value

More

Clear

Save

Cancel

Searching...

Private sector

Public sector

Other

Konna Papadopoulou

Mary Monson

Charles Shacklesford

Kostas Tsakiris

Steve McAllen

George Russel

MARY PAPADOPOULOU

Tony Ferran

Maria Smith

David Cole

Joe Doe

John Doe

William Dalton

Mail

Work Phone

gmail.com

15412587

gmail.com

gmail.com

idor.com

idor.com

tsiamoura@comidor.com

testingcomidor@gmail.com

testingcomidor@gmail.com

testingcomidor@gmail.com

testing@comidor.com

testingcomidor@gmail.com

testingcomidor@gmail.com

testingcomidor@gmail.com

testing@comidor.com

testing@comidor.com

costas.testmail@gmail.com

Show

20

entries

Previous

1

Next



## 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.

Comidor

Summary

New

Relations

Branches

Form Answers

Contract Information

Tasks

Opportunities

Accounting

Processes

Projects

Contacts

Customer journey

Ownership

Created on

Created by

Updated on

Updated by

12-May-2017 14:41:21

anonymous

30-Dec-2021 12:19:04

Thomas Monson

Title

Type

Process Type

Sta

Internal training on Health&Safety

Event

9.COMPLIANCE MANAGEMENT

Comp

Trip to Dubai

General

3.SALES AND MARKETING

Comp

New Customer Request

Issue

2.PRODUCTS & SERVICES

Comp

Research Phase

Work Package

2.PRODUCTS & SERVICES

Comp

Interpret Requirements

Work Package

2.PRODUCTS & SERVICES

Comp

Design and Implementation

Work Package

2.PRODUCTS & SERVICES

Comp

Testing/QA

Work Package

2.PRODUCTS & SERVICES

Comp

Global Release

Work Package

2.PRODUCTS & SERVICES

Comp

Testing/QA

Work Package

2.PRODUCTS & SERVICES

Comp

Global Release

Work Package

2.PRODUCTS & SERVICES

Comp

Research Phase

Work Package

2.PRODUCTS & SERVICES

Comp

Interpret Requirements

Work Package

2.PRODUCTS & SERVICES

Comp

Design and Implementation

Work Package

2.PRODUCTS & SERVICES

Comp

Training on GDPR

Training

6.KNOWLEDGE MANAGEMENT

Comp

HR: Roles & Activities of New Personnel Template

General

5.HUMAN RESOURCES MANAGEMENT

Comp

New Roles and Activities to Ellie

General

5.HUMAN RESOURCES MANAGEMENT

Comp

E-mail Campaign Generation Template

General

3.SALES AND MARKETING

Comp

[Find out more here.](#)



# 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.

Reports

Accounts Overview ↻

Accounts per Category ↻

Accounts per Country ↻

Content ▾

Account Filters

Field

Operator

Value

More

Name ▾

▾

▾

Apply Clear

Task Filters +

Opportunity Filters +

Project Filters +

Case Filters +

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	
12	George Russel	2	0.00	0	0	N/A	0	
13	Charles Shackelford	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.

Create new record in: Contacts Save Save and New Cancel

<b>Basic Info</b>	<b>Personal Info</b>
Title <input type="text" value="Mrs"/>	Birth Date <input type="text" value=""/>
First Name <input type="text" value="MARY"/>	Interests <input type="text" value=""/>
Last Name <input type="text" value="PAPADOPOULOU"/>	LinkedIn account <input type="text" value=""/>
Account <input type="text" value="Comidor"/>	Facebook account <input type="text" value=""/>
Job Title <input type="text" value=""/>	Twitter account <input type="text" value=""/>
Category <input type="text" value="Clients"/>	Skype account <input type="text" value=""/>
Industry <input type="text" value="Consulting"/>	Youtube account <input type="text" value=""/>
Size <input type="text" value="Large"/>	
Region <input type="text" value="Europe"/>	
<b>Contact Info</b>	<b>Ownership</b>
Consent <input type="checkbox"/>	Supervisor <input type="text" value=""/>
Home Phone <input type="text" value="2310402522"/>	Responsible <input type="text" value=""/>
Work Phone <input type="text" value=""/>	Responsible 2 <input type="text" value=""/>
	<b>Address information</b>
	Address <input type="text" value="Venizelou St 21"/>

[Find out more here.](#)



# Manage Contacts

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.

The screenshot displays the Comidor Contacts management interface. On the left is a sidebar with navigation options: Views, Filters, and Groups. The Groups section is expanded, showing a list of contact types with their respective counts: Recent (20), All (71), Contact (14), Users (7), Personnel (5), Account (29), and Lead (9). The main area is titled "Contacts" and features a search bar and an "Advanced search" button. Below this is a table with columns for selection, First Name, Last Name, Account, Country, and Email. The table contains 20 rows of contact data. A context menu is open over the table, showing options for Print, Import, and Export. At the bottom right, there is a pagination control showing "Show 20 entries" and "Previous 1 Next".

	First Name	Last Name	Account	Country	E-I
<input type="checkbox"/>		Mathews Ltd.	Mathews Ltd.		
<input type="checkbox"/>	Andrew	Jackson			testingcomidor@gmail.com
<input type="checkbox"/>					testingcomidor@gmail.com
<input type="checkbox"/>		Vasileia Derveni	Vasileia Derveni		derveni.vasileia@gmail.com
<input type="checkbox"/>		Andrew Jackson	Andrew Jackson		testingcomidor@gmail.com
<input type="checkbox"/>		mary papp	mary papp		ktsiamoura@comidor.com
<input type="checkbox"/>		mary pap	mary pap		ktsiamoura@comidor.com
<input type="checkbox"/>		Konna Papadopoulou	Konna Papadopoulou		ktsiamoura@comidor.com
<input type="checkbox"/>	Kostas	Christodoulou	Comidor		kchristodoulou@comidor.com
<input type="checkbox"/>		Mary Monson	Mary Monson		testingcomidor@gmail.com
<input type="checkbox"/>		Charles Shacklesford	Charles Shacklesford		testingcomidor@gmail.com
<input type="checkbox"/>		Kostas Tsakiris	Kostas Tsakiris		testingcomidor@gmail.com
<input type="checkbox"/>		Steve McAllen	Steve McAllen		testing@comidor.com
<input type="checkbox"/>		George Russel	George Russel		testingcomidor@gmail.com
<input checked="" type="checkbox"/>		MARY PAPADOPOULOU	MARY PAPADOPOULOU		testingcomidor@gmail.com
<input type="checkbox"/>		Tony Ferran	Tony Ferran		testingcomidor@gmail.com
<input type="checkbox"/>		Maria Smith	Maria Smith		testingcomidor@gmail.com
<input type="checkbox"/>		David Cole	David Cole		testingcomidor@gmail.com
<input type="checkbox"/>		Joe Doe	Joe Doe		testing@comidor.com

[Find out more here.](#)



# Opportunities

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.](#)

Views >

Filters >

Groups v

Recent 20

All 29

Prospecting 18

Proposal 4

Evaluation 1

Closed Won 5

Closed Lost 1

Opportunities

Search...

Advanced search...

Importance

Creator

State

Title

Started at

Account

Normal

TM Thomas Monson

Running

New Client X

24-May-2023

Health Supplies

Normal

TM Thomas Monson

Running

test34

10-Apr-2023

Comidor

Normal

TM Thomas Monson

Running

Test

10-Apr-2023

Comidor

Normal

TM Thomas Monson

Running

test

10-Apr-2023

Comidor

Normal

TM Thomas Monson

Running

Test oppo

10-Apr-2023

Normal

TM Thomas Monson

Failed

New project for client A

24-Mar-2023

Aspis Security Ltd

Normal

TM Thomas Monson

Running

opportunities

23-Mar-2023

Comidor

Normal

RU1 Robot User 1

Running

new courier opp

01-Mar-2023

Normal

RU1 Robot User 1

Running

new courier opp

01-Mar-2023

Normal

RU1 Robot User 1

Running

new courier opp

01-Mar-2023

Normal

RU1 Robot User 1

Running

new courier opp

28-Feb-2023

Normal

RU1 Robot User 1

Running

new courier opp

27-Feb-2023

Normal

TM Thomas Monson

Completed

Project για Παραγωγή ηλ. ενέ...

18-Jan-2023

Health Supplies Ltd

Normal

TM Thomas Monson

Running

opportunity

18-Jan-2023

Johnson Ltd

Normal

TM Thomas Monson

Running

New Project A

18-Jan-2023

Comidor

Sums

671,206.00

Export

Print

Comparison

Funnel

Won/Lost

Competition

Reports

Show

20 v

entries

Previous

1

Next



# Manage Opportunities



## 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.

Create new record in: Opportunities

Save

Save and New

Create from template

Cancel

Basic Info

Title★

New Client X

Code

Process Type

3.SALES AND MARKETING x v

Assigned to

Thomas Monson x

Priority

High x v

Scheduled start★

24/05/2023

13:20

Europe/Ath... x v

Scheduled end★

31/05/2023

Account

Health Supplies Ltd x v

Workflow

Opportunity wf \ 1 x v

Success Possibility

Additional Info

Category

Responsible group

Software Development

Description

Mr. Jackson contacted us through our website for a new opportunity.

Status

Stage★

Investigation x v

Completed (%)

State

Start

24/05/2023

End

Closed at

Performance

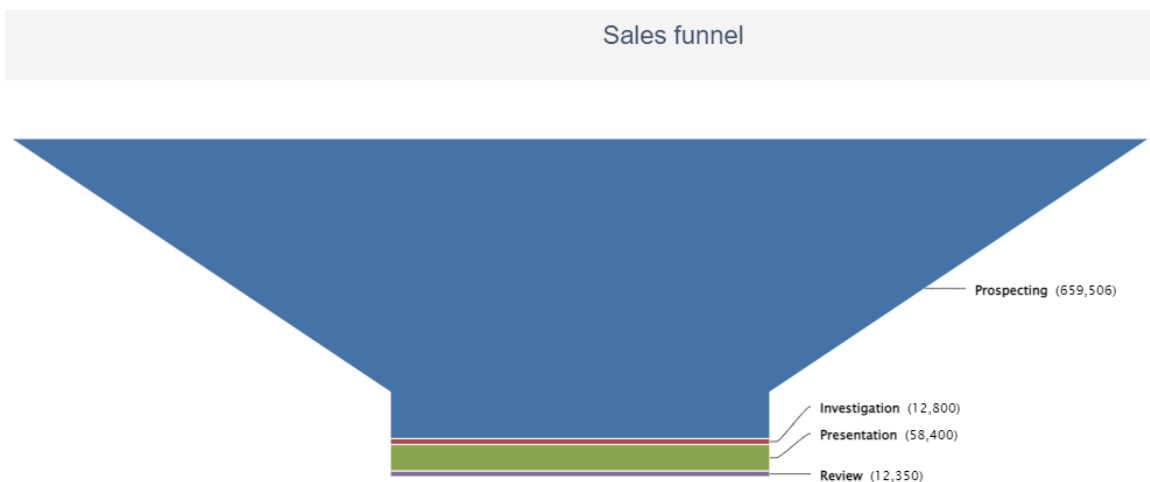
Estimated Workloadcalculated: 43

[Find out more here.](#)

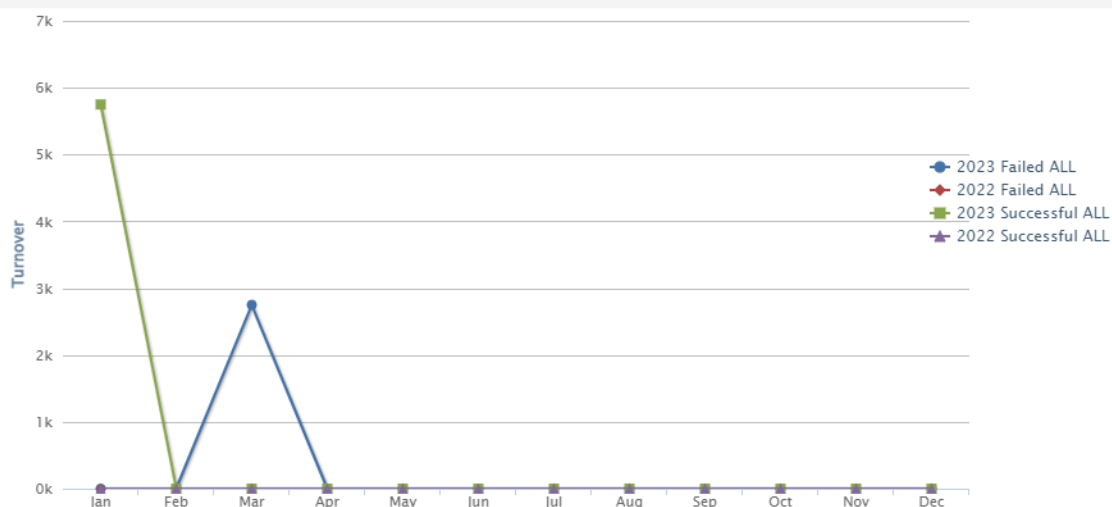


# Opportunity Reports

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



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

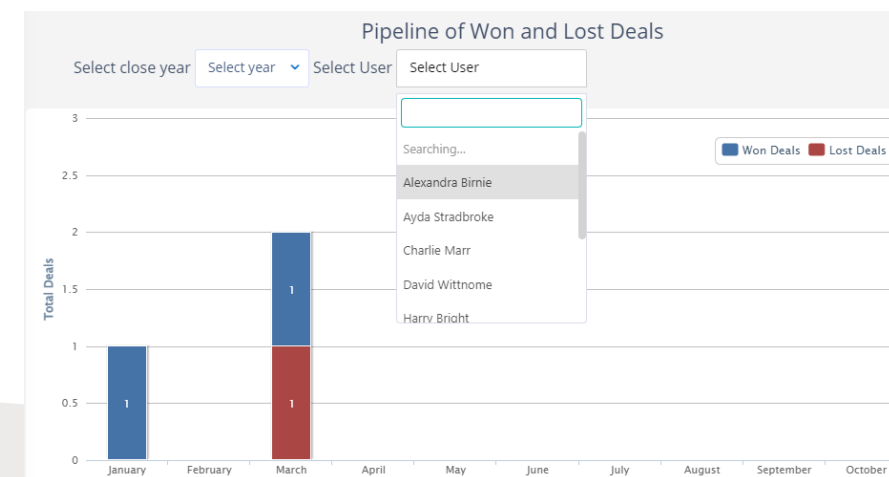


**Pipeline:** View your Opportunities according to the stage you have set.

Search...	Year	Stage				
Prospecting 26 Opportunities	Investigation 3 Opportunities	Presentation 2 Opportunities	Proposal 4 Opportunities	Evaluation 2 Opportunities	Review 2 Opportunities	Negotiation 1 Opportunities
<b>1</b> Start Date: 16-Jan-2023 4261.00 Thomas Monson Last task completed more than a month ago	<b>Cloud services for A...</b> Start Date: 14-Jan-2021 12800.00 Thomas Monson Last task completed more than a month ago	<b>Cloud licenses</b> Start Date: 14-Jan-2021 34900.00 Thomas Monson Last task completed more than a month ago	<b>new courier opp</b> Start Date: 01-Mar-2023 0.00 Thomas Monson Last task completed more than a month ago	<b>Company XY</b> Start Date: 28-Jan-2022 0.00 Thomas Monson Last task completed more than a month ago	<b>New partnership op...</b> Start Date: 08-Jul-2019 12350.00 Thomas Monson Last task completed more than a month ago	<b>Company Delt</b> Start Date: 28-Ji
<b>123</b> Start Date: 16-Jan-2023 410.00 Thomas Monson Last task completed more than a month ago	<b>Marketing Consulting</b> Start Date: 28-Jan-2022 0.00 Thomas Monson Last task completed more than a month ago	<b>Hardware</b> Start Date: 14-Jan-2021 23500.00 Thomas Monson Last task completed more than a month ago	<b>new courier opp</b> Start Date: 01-Mar-2023 0.00 Thomas Monson Last task completed more than a month ago	<b>new courier opp</b> Start Date: 28-Feb-2023 0.00 Thomas Monson Last task completed more than a month ago	<b>Sales collaboration</b> Start Date: 17-Sep-2020 0.00 Thomas Monson Last task completed more than a month ago	
<b>CDE</b> Start Date: 08-Mar-2022 0.00 Thomas Monson Last task completed more than a month ago	<b>New Client X</b> Start Date: 24-May-2023 0.00 Thomas Monson Last task completed this week		<b>new courier opp</b> Start Date: 27-Feb-2023 0.00 Thomas Monson Last task completed more than a month ago			
<b>Consulting Company...</b> Start Date: 01-Jun-2021 0.00 Thomas Monson Last task completed more than a month ago						

**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.



[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*





# 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**



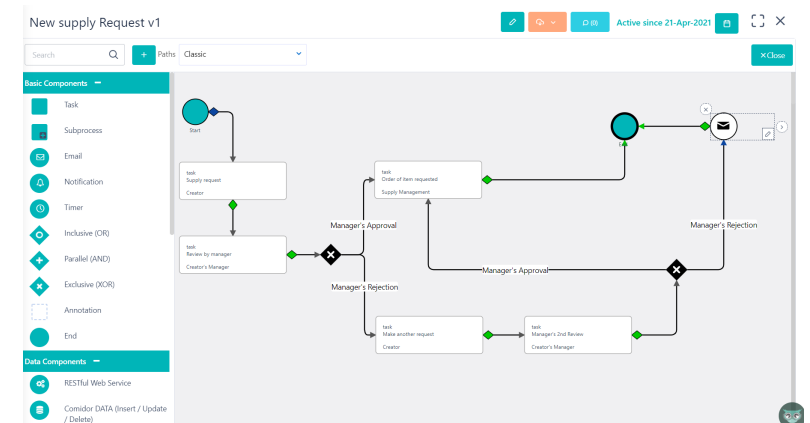
[Find out more here.](#)



# Workflow Designer

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

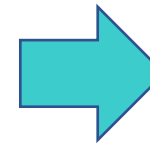
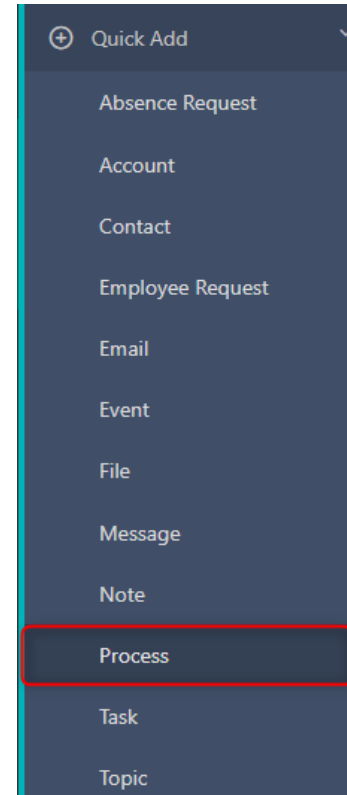
Workflows fully exploit the organizational structure to provide unprecedented process design and action monitoring. Through the Workflow Designer, users can navigate and modify existing processes or create new ones using BPMN 2.0 with drag-and-drop functionality.





# 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](#).

A screenshot of the 'New Process' form in the Comidor system. The form has a teal header bar with the title 'New Process' and a close button. Below the header, there are several input fields: 'Template' (a dropdown menu showing 'New Opportunity template'), 'Title' (a text field with 'opp'), 'Account' (a dropdown menu showing 'New Opportunity template'), 'Process Type' (a dropdown menu showing 'Opportunity creation'), 'Category' (a dropdown menu), 'Priority' (a dropdown menu showing 'Normal'), 'Scheduled date' (a date picker showing '24/05/2023'), and 'Description' (a large text area). At the bottom, there are fields for 'Administrator' (a dropdown menu showing 'Thomas Monson') and 'Attachments' (a text field with a green upload icon). The form is styled with a clean, modern design using teal and white colors.



# Process Template with Workflow

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

Process Templates

☰

🔄

Search...

☐

☒ New Opportunity template

☐ Project tasks report

☐ Opportunity creation

☐ Import Leads

☐ Invoice report

☐ Raise a bug

☐ Self Evaluation Survey

☐ Software Development Project c

☐ Document Approval example tem

☐ Stock Product Values template

☐ Training Process template

☐ Health Survey

☐ HR: Job Application template

☐ Software Development Documen

☐ Induction Process Template

☐ Document Approval Template

☐ HR: On-boarding template

☐ HR: Dismissal / Retirement Temp

New Opportunity template

Relations

User Fields 23

User Forms 1

Ownership

Administrator Thomas Monson

Supervisor Thomas Monson

Created on 16-Jan-2023 11:34:10

Created by Thomas Monson

Updated on 24-May-2023 10:38:48

Updated by Thomas Monson

Summary

Basic Info

Title \* New Opportunity template

Type \* Opportunity ▾

Process Type \* General x ▾

Assigned to

Role ▾

Priority Normal x ▾

Duration working days

Initial State oppl

Account

Workflow New opportunity workflow

Opportunity wf

Workflow New opportunity workflow x

Additional Info

Category ▾

- 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.

New Process

Template

New Opportunity template x

Title\*

opp

Account\*

New Opportunity template

Process Type\*

Opportunity creation

Category

Priority

Normal x

Scheduled date

24/05/2023

Description

Opportunities
New client S / 24-May-2023

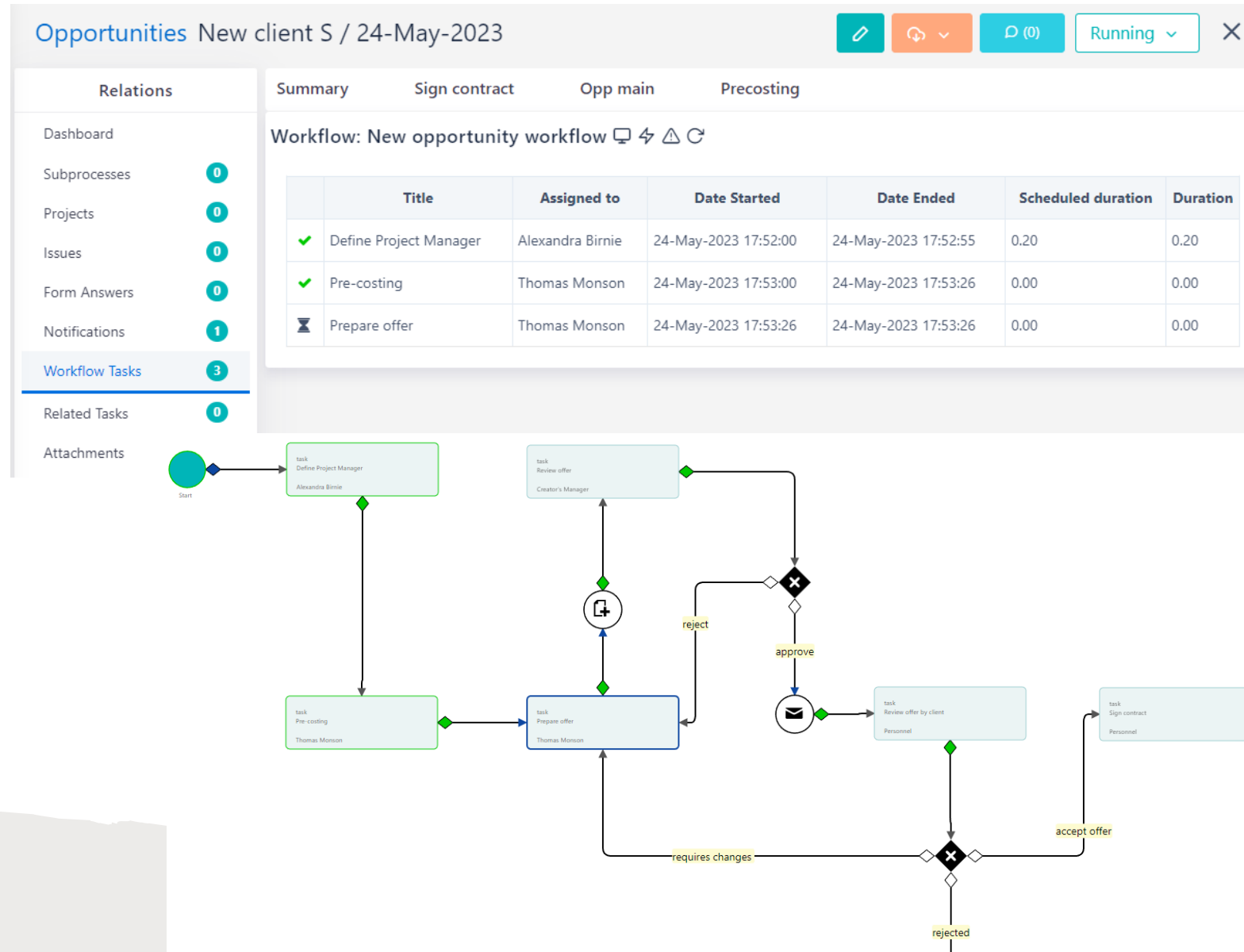
Running ▾

	Relations	<u>Summary</u>	Sign contract	Opp main	Precosting
	Dashboard	<b>Basic Info</b>			<b>Description</b>
<input type="checkbox"/>	Importance	Subprocesses 0	Workflow Code 24		2 year project delivery for 25 core business process automation. 500 users private cloud  <b>▽ Status</b>  <div style="display: flex; justify-content: space-between;"> <div>Stage★</div> <div>Prospecting</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Completed (%)</div> <div>0.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>State</div> <div>Running</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Sart</div> <div>24-May-2023 ⌚ 13:42 EEST / 11:42 BST</div> </div> <div style="display: flex; justify-content: space-between;"> <div>End</div> <div></div> </div> <div style="display: flex; justify-content: space-between;"> <div>Closed at</div> <div></div> </div>
<input checked="" type="checkbox"/>	Normal TM The	Projects 0	Code 32		
<input type="checkbox"/>	Normal TM The	Issues 0	Process Type General		
<input type="checkbox"/>	Normal TM The	Form Answers 0	Assigned to Thomas Monson		
<input type="checkbox"/>	Normal TM The	Notifications 0	Priority Normal		
<input type="checkbox"/>	Normal TM The	Workflow Tasks 1	Scheduled start★ 24-May-2023 ⌚ 13:42 EEST / 11:42 BST		
<input type="checkbox"/>	Normal TM The	Related Tasks 0	Scheduled end★ 24-May-2023		
<input type="checkbox"/>	Normal TM The	Attachments 0	Account Comidor		
<input type="checkbox"/>	Normal TM The	Workflow audit	Workflow New opportunity workflow v1		
<input type="checkbox"/>	Normal RU1 Rol	<b>Ownership</b>		<b>▽ Performance</b>	
<input type="checkbox"/>	Normal RU1 Rol	Administrator Thomas Monson	Success Possibility 0.00		
<input type="checkbox"/>	Normal RU1 Rol	Supervisor Thomas Monson			



# 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.



Ticketing system settings

Basic Email configuration SMS configuration

SMTP Protocol SMTP

SMTP Host smtp.gmail.com

SMTP Port 587

SMTP User comidortesting@comidor.com

SMTP Password .....

TLS Required ☒

Test email settings

Save Cancel

[Find out more here.](#)

Views

Filters

Groups

- Recent 2
- All 2
- Running 1
- Completed 1

Tickets

Search...

	State	Ticket Number	Started at	Title	Administrator	Administrator 2
<input type="checkbox"/>	Running	0	13-Jul-2022	Customer complaint	Thomas Monson	Charlie Marr
<input type="checkbox"/>	Completed	0		Issue with equipment	Thomas Monson	



# Contracts



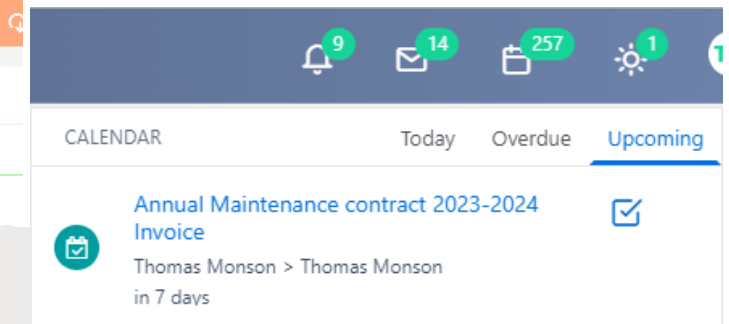
The Comidor Contracts Unit helps your business organize any kind of contract, whether with your clients or not. All Contracts can be categorized according to users' needs and can also be related to several Comidor entities.

## 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!**