

Information Technology
& Services Company

Customer Success Story

Industry

**Information Technology
& Services**

Location

Chile, South America

Overview

The company provides everything from Managed Printing Services to Intelligent Information Management & Automation Solutions. The company's mission is to contribute to their clients' Digital Transformation Journey, focusing on operational excellence.

Business Challenge

Our client's main need was to fully automate the **consulting sales process** where various departments need to collaborate and multiple systems to properly communicate. Up until now, there was no process orchestration, instead, there was extensive use of Excel documents including complex formulas that were exchanged via emails. Hence, communication errors and waste of time were some of the basic pain points for the company.



Impressive Results

**Sales and Customers
Success Managers:**

80% time reduction

as a result of automated
contract and evaluation form
generation

**Controllers (Logistic
and Financial):**

50% time savings

due to structured data and
real-time collaboration

Head of Billing:

**70% faster process
completion**

thanks to dynamic Excel
components and
integrations

Commercial Executive:

**30% time reduction
and error prevention**

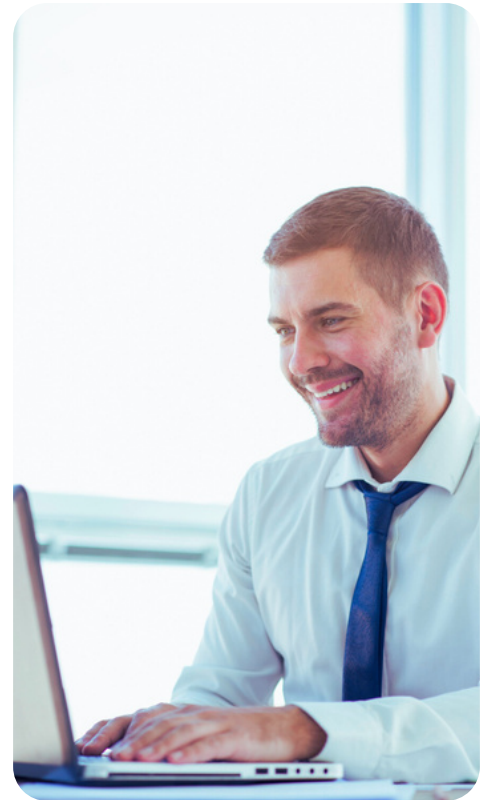
thanks to automated
calculations with ready built-
in formulas

Comidor Solution

By building a Low-Code application, the consulting sales process, including 5 subprocesses is fully automated and orchestrated:

- Technical Proposal Preparation
- Commercial Proposal Preparation
- Client Evaluation
- Closing the Deal
- Document Filling

- ✓ **18 dynamic Excel components** were used to automatically perform calculations for Technical and Commercial Proposal Preparation processes
- ✓ More than **10 integrations** were implemented
- ✓ **RPA Document Creator** component was incorporated into the workflows to produce contracts automatically
- ✓ All documents related to the Consulting Sales processes can be easily tracked **in one place** grouped by client
- ✓ Smart, real-time notifications and messages
- ✓ Advanced **business rules** in workflow automation



Process Mapping

01

The Sales Manager initiates the process by selecting the VAT code of a client.

02

The **first web service** runs to reach the CRM system and fetches the client's information, while **another two web services** capture the current day's currency rates in real-time.

03

Once the Sales Manager adds specific parameters, the "*Technical Proposal Preparation*" subprocess starts automatically.

04

Then, the Sales Manager needs to select from a list of products the equipment and accessories to be included in the proposal.

05

The **supplies web service** runs and **dynamic Excel fields** are created containing all products and their supplies. The Sales Manager needs to specify the reseller and copy costs. Additional dynamic Excel fields are used to perform **automatic calculations**.

06

The **general business summary document is automatically created** in the "*Commercial Proposal Preparation*" subprocess and includes values from workflow fields, Excel fields that were generated in previous steps and a standard template file.

07

The Invoicing Process Manager reviews the proposal consistency, and if it is as expected, the "*Client Evaluation*" subprocess is triggered.

08

In the Negotiation phase, if the client rejects the proposal, the entire Consulting Sales process will fail. Otherwise, the subprocess "*Closing the Deal*" starts.

09

A **web service** is sent to the CRM system to receive all contacts of the current client.

10

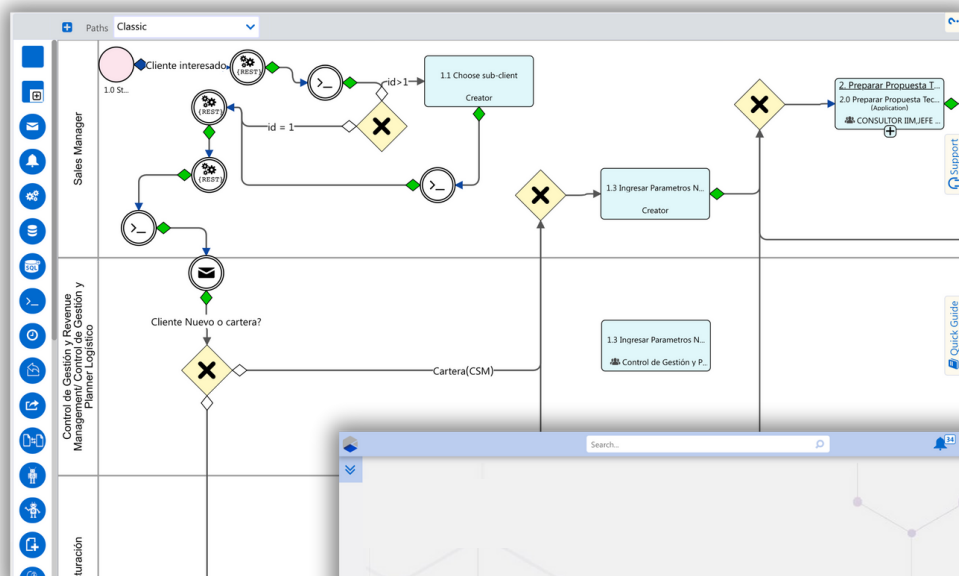
Dynamic Excel fields are used to display the related contact details for the data entry destination of each equipment in a common table.

11

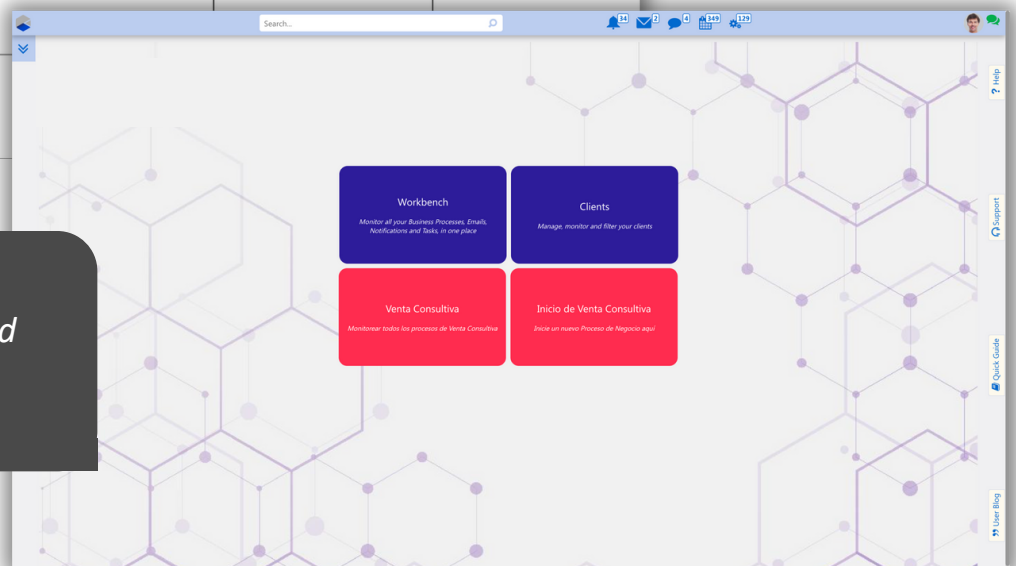
RPA Document Creator runs again to automatically produce the business contract, the technical service, and maintenance contract in PDF format.

12

After signing the contracts, all relevant files are being reviewed and uploaded to the platform. Finally, another **integration** takes place and sends data to the logistics system.



Delivering real, rapid automation



ABOUT COMIDOR

Comidor is an innovative business automation solution provider with a global footprint, operating in 17 countries through a strong network of business partners and solution providers. With a growing user base of over 100,000 daily users and more than 500 clients—including leading enterprises in pharmaceuticals, telecommunications, industrial automation, and professional services—Comidor is trusted for its scalable and future-ready solutions.

Comidor offers an all-in-one Intelligent Transformation Solution, delivered as-a-Service, designed to help fast-growing businesses orchestrate, automate, and autonomize their operations. The platform brings together a digital workplace, customizable business applications, intelligent workflows, and a robust no-code/low-code application development environment. It enables end-to-end process orchestration and automation through BPM, workflow automation, and RPA, while leveraging AI and ML for real-time, data-driven intelligence. Beyond technology, Comidor integrates implementation methodology, and expert services to ensure organizations not only adopt innovation but achieve measurable, value-based outcomes.

Comidor's proprietary cloud-based technology is multi-layered and secure, certified under ISO 9001, ISO 27001, SOC-2, and GDPR. Whether you're looking to improve operational efficiency, boost agility, or scale innovation, Comidor empowers you to do more with less complexity.

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