

CUSTOMER SUCCESS STORY



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.

Our Remarkable 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: Automated calculations with ready built-in formulas result in 30% time reduction and error prevention



Ofimundo 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 to deliver the best experience for its clients.

Comidor SA., the solution provider of Comidor, powered by Enterprise Low-Code, BPM, RPA and AI/ML, enables businesses to achieve continuous growth and improvement through evidence-based, agile, digital transformation and automation.



Comidor Company vision

"to shape the future of work, where people and robots are evolving to work together towards sustainable development goals."

Industry

Information Technology & Services

Location

Santiago, Chile

Product

Comidor v.5.9

The 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 to both send and receive data from the client's CRM and logistics system

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

1
The Sales Manager initiates the process by selecting the VAT code of a client.

2
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.

3
Once the Sales Manager adds specific parameters, the "Technical Proposal Preparation" subprocess **starts** automatically.

4
Then, the Sales Manager needs to select from a list of **products** the equipment and accessories to be included in the proposal.

5
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.

6
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.

7
The Invoicing Process Manager reviews the proposal consistency and if it is as expected, the Client Evaluation subprocess is **triggered**.

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

8
A web service is sent to the CRM system to receive all contacts of the current client.

9
Dynamic Excel fields are used to display the related contact details for the data entry destination of each equipment in a common table.

10
RPA Document Creator runs again to automatically produce the business contract, the technical service, and maintenance contract in PDF format.

11
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**.

LOW-CODE AND HYPERAUTOMATION
FOR FAST-CHANGING BUSINESSES

Build powerful apps
Connect to anything
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Do you need more information?

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