UBER EATES

**Sales Process:** - Sales process deals with Account, opportunity and contact, assets, UEProducts

Sales process start with leads

Sales Segment

• SMB ( small business owner/ small to medium)

• Large or enterprise

Lead source:-

• Inbound APP

• SSU ( self-signup)

• In bound website

• Outbound

• Inbound phone

Sales workflow ->

Self-sign up -> checking for duplicates

**Lead conversion**

Qualifying -> Create an Account, create contact and opportunity

Three type of Account

**• Group account** :- types of accounts that do not include physical location and store front

**• Physical location** :- location of a register business / merchant( self-owned/ corporate owned)

**• Store front:-** closed won Accounts that are connected to a WOK UUID

**Account hierarchy:-**

Account Name Classification Type

• Group Account SMB parent

• Physical location Physical location

• Store front Brick & mortar

**Contact: -** is person identified at the business in which you are reaching out in salesforce

• Primary contact:- owner of business, their information will need to be each physical location

• All other contact:- other contacts can represent managers, marketing directors

**Opportunity: - types**

**• New business**

**• Re negotiation**

**• Up sell**

**Opportunity Stage**

**• Outreach ->**  contact the owner of restaurant

**• Pitching->** discuss how Eats works and possible products

**• Negotiation->**  pricing approved and seller sends contracts

**• Closed won->** documents have been validated and verified

Go to add eats products and they pick products

And updates market price

For new business there will always be new storefront created

In storefront----- link products to storefront

• UE product offering will be created with all the products that are selected

• Assets will created automatically if new business

Assets which belong which account which account belong to what opportunity

Assets relates to Account (physical location) and front store and opportunity and UE product offering

\*marketplace fee

\* Latest

Once opportunity closed won, we can’t able to change

\* WOK is the tool teams use to manage restaurant accounts

Main use: - onboarding, product enabling, menu creation and miscellaneous payments features

Wok contains all merchant accounts apart of Uber eats

\* Global wok account creation (aka, GWAC) will automatically create WOK accounts when the stage goes to Negotiation contract sent for select account /opportunity

Service :-

It is basically Service cloud for salesforce include everything from cases even activation of the accounts and customer service

Integration: - WOK integration and BOX integration

DocuSign is template management it is another integration

We have two type of DocuSign

• Bulk DocuSign

• Single DocuSign

It is document mapping --- you’re merging the fields from salesforce to DocuSign templates

Deployment: - COPADO,

It has to be done in dev sandbox first then move to UAT

Then move to staging then move to production

Bulk creation