



FINBYZ TECH PVT LTD

“STEER **YOUR**
VISION”

QUOTE ASSISTANT

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Overview

The Quotation Automation System streamlines the sales workflow by automatically generating quotations from customer inquiries. It works by fetching opportunities from inquiry emails, reading customer requirements (including attachments), and identifying relevant product or item groups. By analysing historical purchases, the system suggests the best items to include in the quotation and then creates it directly in ERP while linking it back to the opportunity. This ensures faster responses, higher accuracy, and a smoother sales process.

Workflow Steps

1. **Fetch Opportunity** from ERP.
2. **Collect linked emails & attachments** (Word, Excel, PDF, OCR, Images).
3. **Send attachments & mail text to AI Agent.**
4. **AI Agent parses requirements** (items, specifications, codes, capacities).
5. **Fetch past customer history** (previous purchases, quotations, invoices).
6. **Combine parsed requirements + customer history.**
7. **Send to AI Agent for item mapping:**
8. Match with ERP Item Master.
9. Suggest closest items.
10. Add spares/accessories if needed.
11. Highlight spec match % vs unmatched.
12. **Generate Draft Quotation** with suggested items, pricing, and terms.
13. **Sales team reviews & finalizes** before sending to customer.

Quote Assistant Workflow



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Benefits

- **Faster Response:** Quotations are generated instantly, eliminating delays from manual data entry.
- **Greater Accuracy:** Past purchase data is leveraged to suggest the most suitable items.
- **Better Customer Alignment:** Inquiries are quickly converted into accurate quotations.
- **Reduced Workload:** The sales team simply reviews and approves the quotation before sending.