

Offer Automation Agent

Product Overview

1. Executive Summary

The Offer Automation Agent is an AI-powered system that automates the creation of sales offers and quotations from incoming email requests. Unlike traditional automation tools that operate without oversight, the Offer Automation Agent combines autonomous AI processing with mandatory human verification—ensuring that no offer or sales order enters your ERP system without explicit approval from your sales team.

The system monitors your sales inbox, analyzes incoming requests for quotation (RFQs), extracts product requirements from emails and attachments, matches them to your product catalog, and generates complete draft offers. Sales representatives then review, adjust if needed, and approve offers through an intuitive web portal before they are saved to your ERP system.

Organizations deploying the Offer Automation Agent can expect significant reduction in time spent on routine offer creation, fewer errors in product matching, and the ability to handle higher volumes of customer requests without proportional increases in staff workload.

2. Product Overview

2.1 System Components

The Offer Automation Agent consists of two integrated components:

AI Agent: Continuously monitors your email inbox for incoming RFQs. When a request arrives, the agent analyzes the email content and any attached documents (PDF, Excel), identifies the customer, extracts requested products and quantities, matches them against your product catalog, and generates a complete draft offer with pricing.

Review Portal: DataFigured provides access to a web-based Review Portal where sales representatives verify AI-generated offers before approval. The portal displays the complete offer with AI explanations and confidence scores for each product match, enabling informed review and quick corrections when needed.

2.2 How It Works

1. Customer sends an RFQ via email (with optional PDF/Excel attachments)
2. AI Agent detects and analyzes the request automatically
3. Agent matches products, identifies customer, calculates quantities and pricing
4. Draft offer is created and sales rep is notified
5. Sales rep reviews the offer in the Review Portal
6. After verification and any adjustments, sales rep approves the offer
7. Approved offer is automatically saved to your ERP system

3. Key Features & Capabilities

AI Agent Capabilities

- **Automated Email Monitoring:** Continuous inbox monitoring with domain-validated sender verification
- **Intelligent Product Matching:** Semantic search combined with AI-powered matching to find correct products

- **Document Processing:** Extracts product information from PDF and Excel attachments, including OCR
- **Customer Identification:** Automatically identifies customers from email addresses and document content
- **Confidence Scoring:** Each product match includes a confidence score indicating match reliability

Review Portal Capabilities

- **Secure Access:** Microsoft OAuth authentication using existing work email accounts
- **Comprehensive Review:** View complete offer details including AI reasoning and confidence per line
- **Full Editing:** Add, modify, or remove offer lines; adjust quantities, prices, and other fields
- **One-Click Actions:** Approve offers to ERP or reject with a single click
- **Continuous Learning:** Corrections made in the portal train the agent to avoid similar mistakes

4. Benefits & Business Value

Time Savings: Dramatically reduce time spent manually creating offers from email requests. The agent handles routine work of reading emails, finding products, and building offers.

Improved Accuracy: AI-powered product matching reduces errors from manual lookup. Confidence scores highlight uncertain matches for focused human review.

Maintained Control: Every offer passes through human verification before entering your ERP system. Sales representatives retain full control over what gets approved.

Continuous Improvement: The agent learns from every correction made in the Review Portal, improving accuracy over time based on your team's expertise.

Scalable Capacity: Handle increased RFQ volumes without proportional staffing increases. The agent processes requests around the clock.

5. Integration & Implementation

Cloud-Based Architecture: Hosted on AWS infrastructure within the European Union, ensuring high availability and data residency compliance.

ERP Integration: Connects securely to your existing ERP system via API with full field mapping to your system's structure.

Email Integration: Supports Microsoft Outlook and Gmail using service account authentication for secure, automated access.

Implementation Process:

- Initial configuration and ERP API setup
- Product catalog integration and training data collection
- Agent training with historical offer data
- Quality assurance with test offers
- Sales team training and launch
- Ongoing optimization and support

6. Security & Compliance

The Offer Automation Agent implements enterprise-grade security measures:

Security Domain	Implementation
Data Location	All infrastructure hosted on AWS EU (Frankfurt). Data at rest remains within the EU.
Encryption	TLS 1.2+ for all data in transit. AES-256 encryption for stored data.
Authentication	Microsoft OAuth for portal access. Domain validation for email senders.
Access Control	Role-based permissions with complete audit trail of all actions.
Compliance	GDPR compliant with EU data residency. Standard Contractual Clauses for international transfers

AI Processing & Privacy

- Zero Data Retention (ZDR) with AI service providers—data is not stored or used for model training
- Email content is processed but not permanently stored
- Training data remains exclusively on EU-based servers
- Data Processing Agreements in place with all sub-processors

Privacy by Design: The system maintains transparent operations with human approval required for all ERP submissions. Complete data portability and deletion available on request.