

# ERP Agent –

## Offer Agent Integration Requirements

### *Database Queries and Write Permissions*

This document defines the minimum required API endpoints, search capabilities, and field requirements for a new ERP system to work with the Offer Automation Agent.

## 1. CUSTOMER API REQUIREMENTS

### 1.1 GET Customer - Search/Lookup

**Purpose:** Find customer by various identifiers (email sender lookup, manual search)

**Search Parameters:**

Search Parameter	Required	Description
search (text)	YES	General text search (name, email)
email	YES	Exact email match
customerNumber	YES	Exact customer number match
vatNumber	YES	VAT/Y-tunnus
limit	NO	Result limit (default: 50)

**Minimum Required Response Fields:**

Field	Type	Required	Description
id	string	YES	Internal customer ID (for API calls)
number / customerNumber	string	YES	External customer number (visible reference)
name	string	YES	Customer/company name
street	string	YES	Street address
postal_code	string	YES	Postal code
city	string	YES	City
country	string	NO	Country (defaults to "Finland")
contact_person	string	YES	Main contact person name
email	string	YES	Email address
phone	string	NO	Phone number
vat / vatNumber	string	NO	VAT/Y-tunnus
deny_credit OR credit_allowed	boolean	YES	Credit status
person_responsible_number	string	YES	Salesperson ID/number
person_responsible_name	string	NO	Salesperson name
payment_term_number	integer	YES	Default payment term code

**Invoicing Address Fields (for offers):**

Field	Type	Required	Description
invoicing_name / invoicing_name1	string	YES	Invoicing name line 1
invoicing_name2	string	NO	Invoicing name line 2
invoicing_address	string	YES	Invoicing street address
invoicing_postal_code	string	YES	Invoicing postal code
invoicing_city	string	YES	Invoicing city

### 1.2 GET Customer by ID

**Endpoint pattern:** GET /customers/{customer\_id}

**Response:** Same fields as search endpoint, single customer object

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## 2. PRODUCT API REQUIREMENTS

### 2.1 GET Product - Search/Lookup

**Purpose:** Find products by code or search term for offer creation

#### Search Parameters:

Search Parameter	Required	Description
sku / product_code	YES	Exact product code match
search (text)	YES	Wildcard search (name, description, search code)
group_code	YES	Filter by product group
limit	NO	Result limit (default: 100)

#### Minimum Required Response Fields:

Field	Type	Required	Description
id / product_id	string	YES	Internal product ID
sku / product_code	string	YES	Product code/SKU
name / product_name	string	YES	Product name
extra_name / description2	string	YES	Additional name/description (Lisäimi)
extra_name2 / description3	string	NO	Second extra name if available
extra_name3 / description4	string	NO	Third extra name if available
search_code / product_searchcode	string	NO	Product search code
description	string	NO	Full product description
unit / stock_unit	string	YES	Unit of measure (KPL, M, KG, etc.)
sales_price_taxless / unit_price	float	YES	Unit price (tax-exclusive)
sales_price_taxful	float	NO	Unit price (tax-inclusive)
taxrate_code / vat_rate	string/float	YES	VAT rate (default 25.5%)
group_code / product_group	string	YES	Product group code

#### Stock Information (if available):

Field	Type	Required	Description
stocks[].quantity OR stock_instock	float	NO	Total stock quantity
stocks[].reserved	float	NO	Reserved quantity
available_quantity	float	NO	Available = quantity - reserved

### 2.2 GET Product Pricing (Customer-Specific)

**Purpose:** Get customer-specific pricing, volume discounts

**Endpoint pattern:** GET /products/{product\_code}/pricing

#### Query Parameters:

Query Parameter	Required	Description
customerId	YES	Customer ID for specific pricing
quantity	NO	Quantity for volume pricing

#### Minimum Required Response Fields:

Field	Type	Required	Description
price / customer_price	float	YES	Customer-specific price
discount_percent	float	NO	Applied discount percentage
list_price	float	YES	Standard list price (for comparison)

### 2.3 Batch Product Search (Database Query Alternative)

**Purpose:** Complex product search with filtering

#### Required search capabilities:

- Wildcard search on: product\_code, product\_name, product\_description, search\_code
- Filter: active products only (product\_nonactive\_bit = 0)

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- Filter: stock products only (product\_nonstock\_bit = 0)
- Filter: exclude specific product groups (e.g., group\_code != 0)
- Include: yearly sales quantity (for popularity ranking)

## 3. OFFER/QUOTE API REQUIREMENTS

### 3.1 POST Create Offer

**Purpose:** Create a new offer/quote in ERP

#### Minimum Required Request Fields:

Field	Type	Required	Description
customer_id / customer_number	string	YES	Customer identifier

#### Full Offer Header Fields (for update):

Field	Type	Required	Description
offer_date	datetime	YES	Offer creation date
valid_until / offer_valid_date	datetime	YES	Offer validity date
our_reference	string	YES	Internal reference (auto: "AUTO-{timestamp}")
customer_reference	string	NO	Customer PO/reference
customer_name	string	YES	Customer name
customer_contact	string	NO	Customer contact person
customer_address	object	YES	Invoicing address (street, postal, city)
delivery_address	object	NO	Delivery address if different
payment_term	integer	YES	Payment term code
delivery_method	integer	YES	Delivery method code (6=invoice, 33=prepay)
delivery_term	integer	NO	Delivery term code
notes	string	NO	Offer notes/comments
language_code	string	NO	Language (default: "FIN")
currency	string	NO	Currency (default: "EUR")
responsible_person_number	string	NO	Salesperson number

#### Minimum Required Response:

Field	Type	Required	Description
offer_id	string	YES	Internal offer ID
offer_number	string	YES	Human-readable offer number

### 3.2 POST Add Offer Line

**Purpose:** Add product line to existing offer

**Endpoint pattern:** POST /offers/{offer\_number}/lines

#### Minimum Required Request Fields:

Field	Type	Required	Description
product_code	string	YES	Product SKU
quantity	float	YES	Quantity
unit	string	YES	Unit of measure
unit_price	float	YES	Unit price
position	integer	YES	Line order position

#### Additional Line Fields:

Field	Type	Required	Description
description	string	NO	Line description
discount_percent	float	NO	Discount percentage
account	string	NO	GL account code
cost_center	string	NO	Cost center code
tax_rate	float	NO	VAT rate

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## 3.3 GET Offer

**Purpose:** Retrieve offer details (for verification)

**Endpoint pattern:** GET /offers/{offer\_number}

### Minimum Required Response Fields:

Field	Type	Required	Description
offer_id	string	YES	Internal ID
offer_number	string	YES	Offer number
customer_id	string	YES	Customer ID
customer_name	string	YES	Customer name
offer_date	datetime	YES	Offer date
valid_until	datetime	YES	Validity date
status	string	YES	Status (draft/sent/accepted/rejected)
lines	array	YES	Array of offer lines
subtotal	float	YES	Subtotal before VAT
vat_amount	float	YES	Total VAT amount
total_amount	float	YES	Grand total

### Line item fields in response:

Field	Type	Required	Description
line_id	string	YES	Line identifier
product_code	string	YES	Product SKU
product_name	string	YES	Product name
quantity	float	YES	Quantity
unit	string	YES	Unit
unit_price	float	YES	Unit price
line_total	float	YES	Line total
discount_percent	float	NO	Discount %
vat_rate	float	YES	VAT rate

## 3.4 PUT Update Offer

**Purpose:** Update offer header data

**Endpoint pattern:** PUT /offers or PUT /offers/{offer\_id}

**Payload:** Complete offer object (same fields as POST)

## 3.5 DELETE Offer

**Purpose:** Delete failed/cancelled offer (cleanup)

**Endpoint pattern:** DELETE /offers/{offer\_id}

# 4. PAYMENT TERMS API

## 4.1 GET Payment Terms

**Purpose:** Lookup payment term details

**Endpoint pattern:** GET /payment-terms/{term\_id} or included in customer data

### Minimum Required Response Fields:

Field	Type	Required	Description
id / number	integer	YES	Payment term code
name / description	string	NO	Term description
days	integer	NO	Payment days

# 5. PERSON/SALESPERSON API

## 5.1 GET Person/Salesperson

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**Purpose:** Lookup salesperson by email (for auto-assignment)

## Search capabilities needed:

- Search by email address
- Get person number/ID

## Minimum Required Response Fields:

Field	Type	Required	Description
id	string	YES	Person ID
number	string	YES	Person number (external ref)
name	string	YES	Person name
email	string	YES	Email address

## 6. SUMMARY: MINIMUM VIABLE ERP API

### READ Operations (GET)

Endpoint	Search Params	Critical Response Fields
GET /customers	search, email, customerNumber	id, number, name, street, postal_code, city, contact_person, email, credit_allowed, payment_term_number, person_responsible_number, invoicing address fields
GET /customers/{id}	-	Same as above
GET /products	sku, search	id, sku, name, extra_name(s), unit, unit_price, vat_rate, group_code
GET /products/{code}/pricing	customerId, quantity	price, discount_percent, list_price
GET /offers/{number}	-	offer_id, offer_number, customer_id, status, lines[], totals
GET /payment-terms/{id}	-	id, description
GET /persons	email	id, number, name, email

### WRITE Operations (POST/PUT/DELETE)

Endpoint	Method	Critical Payload Fields
POST /offers	POST	customer_id
PUT /offers	PUT	Full offer header (dates, customer info, addresses, terms)
POST /offers/{number}/lines	POST	product_code, quantity, unit, unit_price, position
DELETE /offers/{id}	DELETE	-

### Authentication

- Session-based or token-based authentication
- Session should support at least 24-hour validity

## 7. OPTIONAL BUT RECOMMENDED

These endpoints/features enhance functionality but are not strictly required:

- **Customer Creation** - POST /customers - For creating new customers
- **Send Offer Email** - POST /offers/{id}/send - ERP-integrated email
- **Update Offer Status** - PUT /offers/{id}/status - Status tracking
- **Stock Balance Query** - Real-time stock availability
- **Yearly Sales Data** - Product popularity for search ranking