

Agent Advantage™ for Salesforce

The *Quoting Agent* assist the Sales Rep to drives the quoting aspect of the sales process.

BUSINESS CHALLENGE

Coordinating sales is complex, especially as customers expect more personalization and efficiency. It becomes challenging for the Sales teams to balance out the tailored experiences for customer's along with managing tasks like quote approvals and inventory tracking.

AGENTIC SOLUTION

The Quoting Agent drives the quoting aspect of the sales process, coordinating approvals and while also checking inventory to ensure the customer's chosen products are available. The agent also helps ensure that the correct sale agreements and rebates* are associated to the Quote, enabling a smooth and frictionless quoting experience.

VALUE PROPOSITION



Higher Accuracy

Enabling the correct sales agreements and verifying available stock ahead of time ensures accurate quoting tied to the right agreements



Increased Efficiency

Agent driving the quote management/approvals enables a more efficient process and a shorter overall quote lifecycle



Improved Sales Rep Experience

Less time spent on data entry and collating allows reps to spend more time selling to potential customers

AGENT CAPABILITIES



Quote Creation

Create Quote and Quote Lines based on the customer requirements, and prices based on the sales agreement and available rebates.



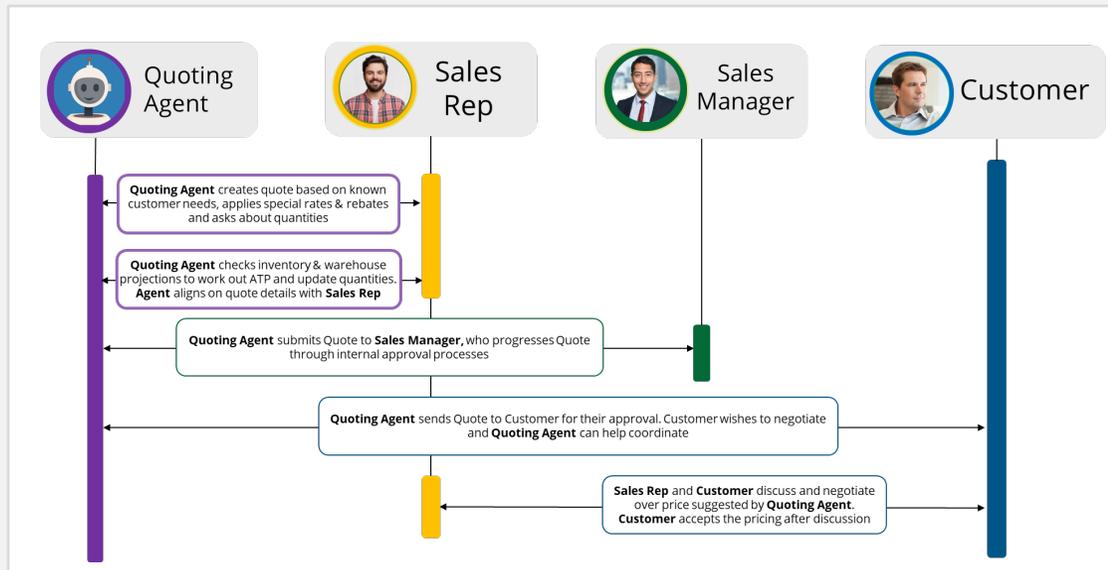
Quote Approvals

Manage approval processes with relevant managers and send notifications based on approval outcomes



Perform Inventory Check

Perform Inventory Check for quantity of product that is available to promise to ensure Quote can be fulfilled



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