

Agent Advantage™ for Salesforce

The *Field Inspection Agent* streamlines inspection plans in severe weather areas.

BUSINESS CHALLENGE

Traditionally, the Inspection process requires manual data gathering by accessing data on past/upcoming severe weather conditions to identify assets which may need ad-hoc inspections. The Planner spends significant time on manually creating Inspection Plans and assigning them to Ground Inspectors.

AGENTIC SOLUTION

The Field Inspection Agent works alongside the Inspection Planner to transform inspection planning in areas vulnerable to severe weather. The AI agent streamlines Inspection plan creation and assignment to resources which does not only boosts efficiency but also provides ease of planning.

VALUE PROPOSITION



Business Growth:

Enhanced growth as Lucas can spend more time on High Level Strategic Planning.



Enhanced Decision Making

Access to real time data allowing Planner to identify areas that are in critical need of inspections based on weather forecasts.



Improved Planner Experience

for Lucas, who can focus on high impact tasks instead of spending time on manual and repetitive tasks.



Increased Responsiveness :

Agent identifying potential inspection areas and making updates to plans enables shorter response time from identification to asset maintenance.

AGENT CAPABILITIES



Area Suggestions for Inspections

Identify and prioritize areas needing inspections based on adverse weather conditions (e.g., flooding, storms).



Creation of Inspection Plans

Develop inspection Plans for the suggested areas along with detailed work orders outlining the timeline.



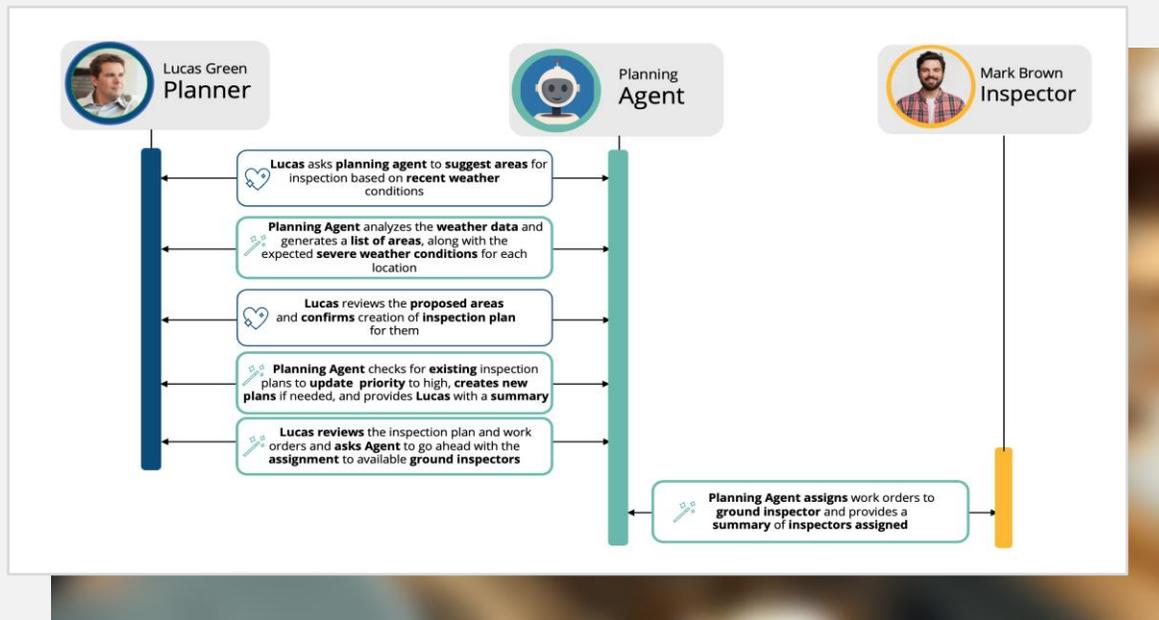
Update Inspection Plans

Make real-time updates to Inspection Plans & Work Orders on behalf of the planner.



Assignment to Ground Inspectors

Assign the Inspection plans to ground inspectors based on resource availability and expertise and notify them.



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Agent Advantage™ for Salesforce

The *Purchasing Assistant Agent* coordinates the order process for manufacturers across front and back office

BUSINESS CHALLENGE

Traditionally, when manufacturers are selling complex orders to their customers, there is a lot of coordination required across both front and back office (e.g. sales and supply chain alignment). Placing the order is dependent on factors such as credit history, shipping & packaging needs and available stock. This information isn't always surfaced early enough, leading to delays in order processing.

AGENTIC SOLUTION

The Purchasing Assistant Agent directly interacts with the customer to capture requirements, using account details to identify long-term agreements (LTAs) and prior orders. It also coordinates with other agents in the background (e.g., Sales and Order Fulfilment) to collect required inputs at the right time, enabling fast, seamless order processing—including creating orders from an LTA or as a standalone order, and providing recommendations.

VALUE PROPOSITION



Improved Order Accuracy

Proactively checking available quantities, credit scores & automating pricing reduces Order blockage and delays



Effective Multi-Agent Co-ordination

Customer interacts with a single agent who is able to contextually understand when to reach out to other human or digital agents to gather data and complete the task.



Faster Agreement Drawdowns

Agent automatically knows customer's details and context, reducing the time taken for order to be placed as the sales process is seamless

AGENT CAPABILITIES



Order Creation

Identify existing LTAs, create order with correct products & quantities and apply eligible rebates.



Multi-Agent Coordination

Automatically coordinate across front and back-office AI agents to gather inventory, shipping, rebates, and credit details.



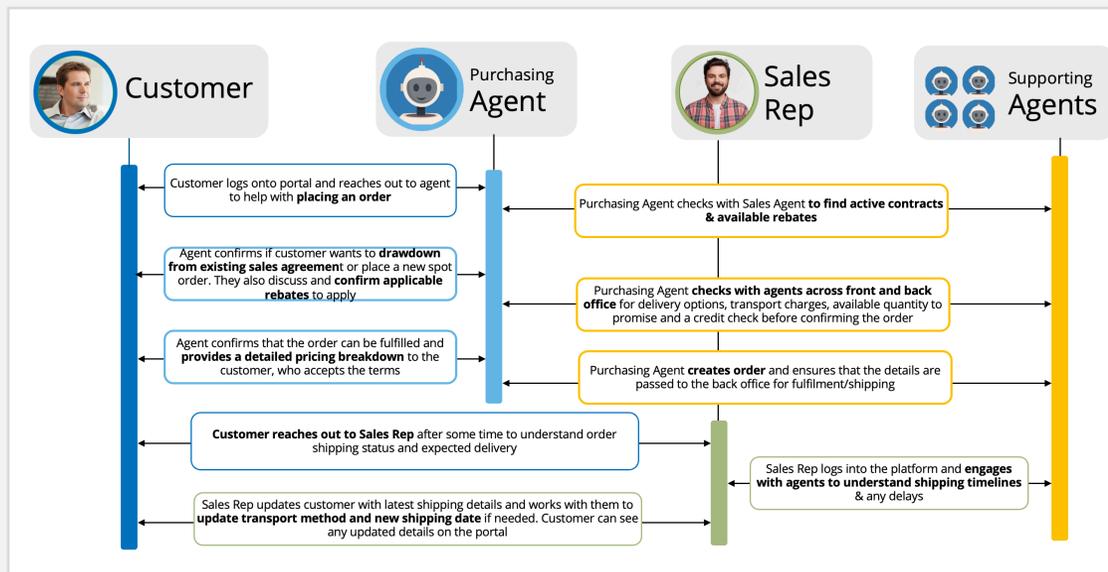
Post Order Support

Respond to customer questions and queries on the portal even outside of business hours



Personalized Recommendations

Provide personalized product recommendations and comparisons based on customer needs



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Agent Advantage™ for Salesforce

The *Sales Agent* supports the Sales Rep in Opportunity Management, greatly reducing their manual efforts.

BUSINESS CHALLENGE

Customers increasingly expect personalized experiences with product recommendations tailored to their needs. Meanwhile, sales reps often spend significant time searching through multiple documents such as contracts and agreements—to determine eligible offers. This manual process across various systems slows down the sales cycle.

AGENTIC SOLUTION

The Sales Agent coordinates between the sales rep, reducing their workload by handling the data creation in the platform, collating all the relevant data points such as existing contracts and sales agreements, and identifying the relevant rebates/offers that the sales rep can provide to the customer based on their customer segment.

VALUE PROPOSITION



Increased Efficiency

Easy and fast collation of various documents such as contracts and sales agreements enables a more efficient sales process



Reduced Manual Effort

Highlighting the key elements of each opportunity helps sales reps minimize time in the system and reduces manual tasks.



Improved Sales Rep Experience

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

AGENT CAPABILITIES



Opportunity Management

Provides a clear summary of the opportunity for sales reps, ultimately helping advance it through its stages.



Provide Customer Summary

Collate and summarize key customer information such as their sales agreement, contract and past orders



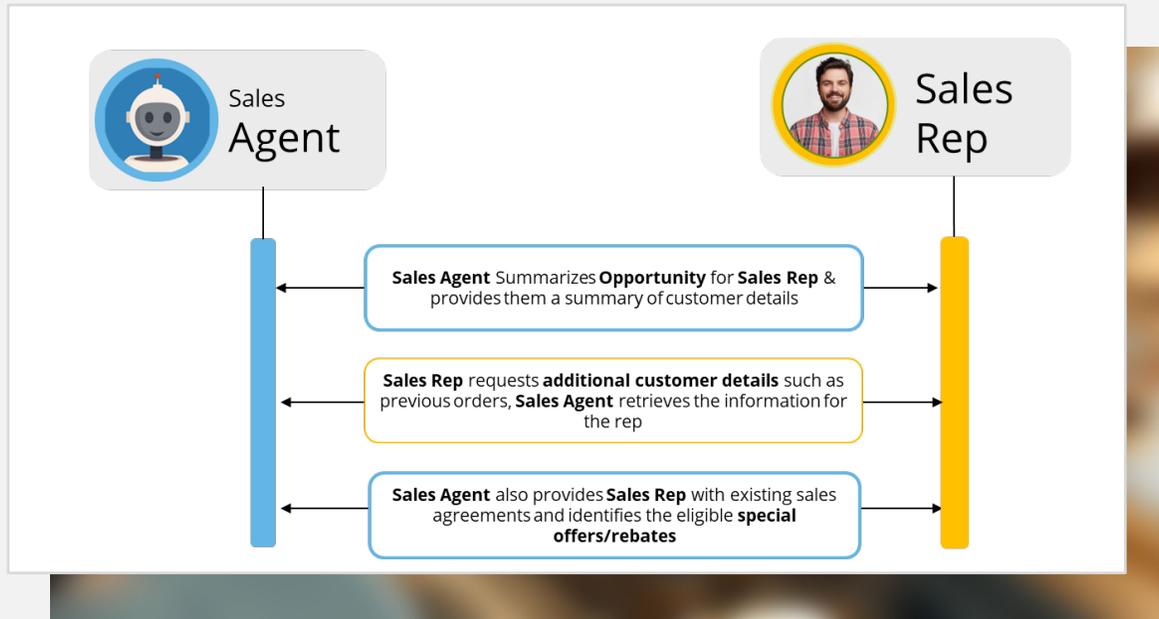
Identify Customer Offers

Provide rep with the available rebates* and special offers for a specific customer based on their segment and service level



Manage Order Updates

Engage with customer to manage Order updates, proactively updating delivery methods to help ensure timely fulfilment



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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.



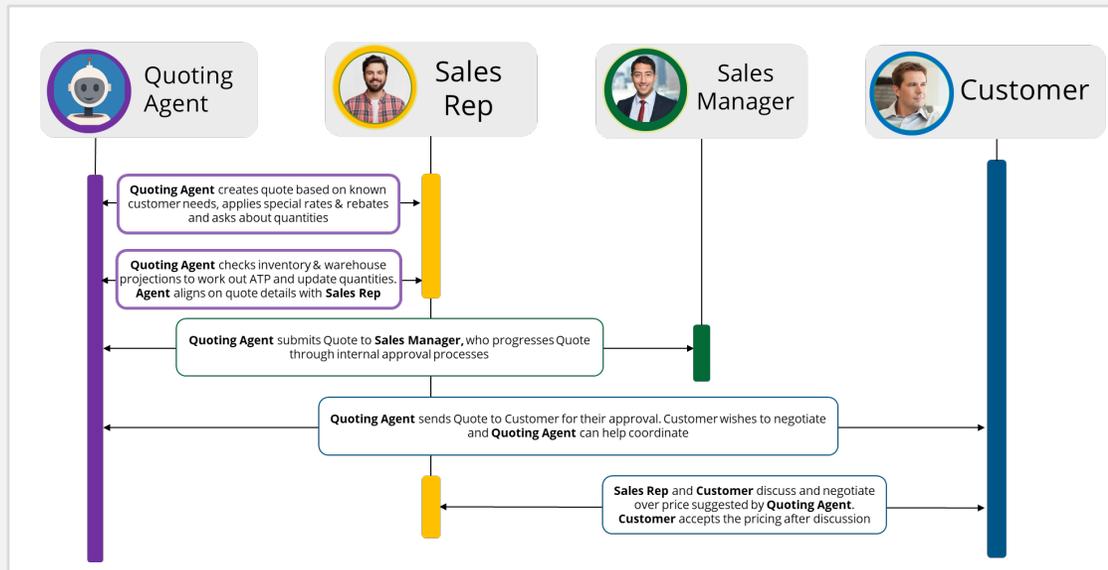
Quote Approvals

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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Agent Advantage™ for Salesforce

The *Contract Agent* assist Contract Admin to streamline the contracting process.

BUSINESS CHALLENGE

Traditionally after the Quote has been accepted, coordinating contract signing becomes a complex task, requiring cross-team collaboration, manual processes, and careful attention to accurate and compliant contract terms.

AGENTIC SOLUTION

The Contract agent streamlines the contracting process by drafting initial agreements and incorporating all necessary clauses. The agent coordinates between the Contract creation team, and the customer to help ensure compliance and secure timely signatures from all stakeholders, driving efficiency and reducing risks.

VALUE PROPOSITION



Quote to Contract Creation

Streamline contracting by converting accepted quotes into accurate draft contracts - validated for products, quantities.



Improved Coordination ★

Agent driving the process among internal and external personas ensures a smoother signature process and less manual work for Sales/Contract team.



Faster Signature ★

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

AGENT CAPABILITIES



Draft Contract Creation

Create draft Contract based on the accepted quote, ensuring correct product, quantities, and all required contract details are accurately captured.



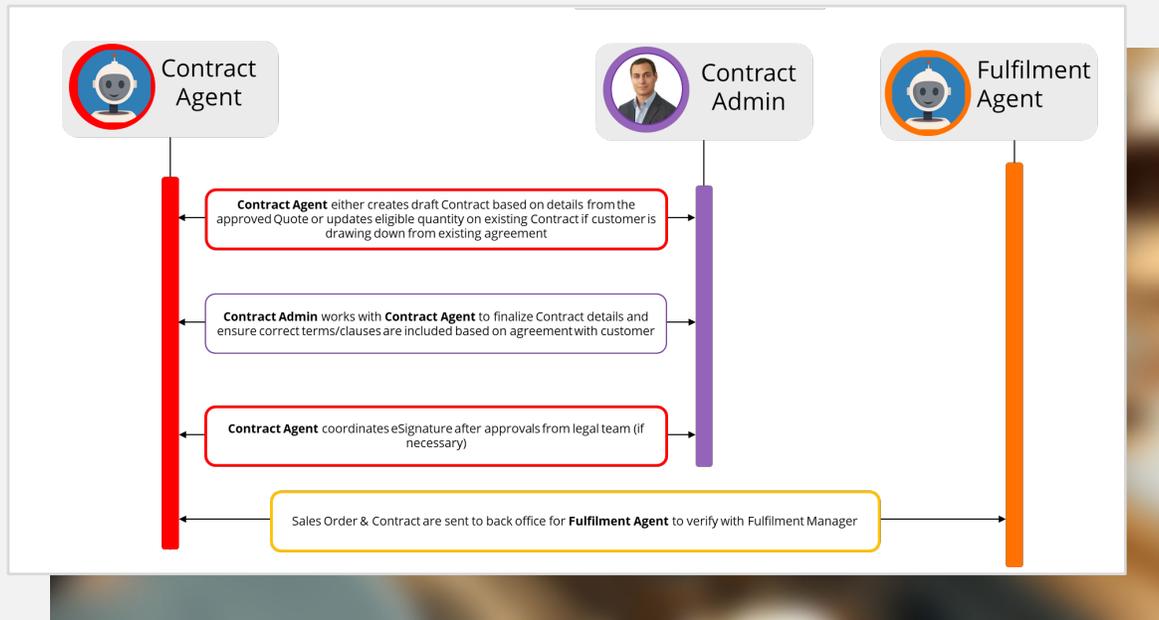
Clause Management ★

Insert recommended clauses into the Contract and liaise with Contract team to ensure compliance.



Coordinate eSignature ★

Send Contract to customer to sign and manage the eSignature process with notifications to relevant parties



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Agent Advantage™ for Salesforce

The *Order Fulfilment Agent* assist the Fulfilment Manager with accurate order creation and verification process.

BUSINESS CHALLENGE

Traditionally the order accuracy and cross-team coordination remain challenging, often leading to delays and errors in capturing order details. Front office teams also struggle with limited visibility into order status, impacting overall efficiency.

AGENTIC SOLUTION

The Order Fulfilment agent helps ensure accurate order creation and verification across front and back-office teams, coordinates shipping for timely delivery, and keeps front office systems updated with real-time order and delivery status.

VALUE PROPOSITION



Improved Accuracy

Creating orders based on the related Quote and associated, reducing the risk of downstream errors.



Enhanced Visibility ★

Automatic update of Order status across front and back office makes it easier for teams across multiple systems to stay aware of progress across order lifecycle.



Efficient Fulfilment ★

Fulfilment processes accelerate when the agent handles documentation and coordinates shipping between teams on behalf of human staff.

AGENT CAPABILITIES



Order Management

The order is automatically generated using information from the Quote and the signed sales agreement or contract with the customer.



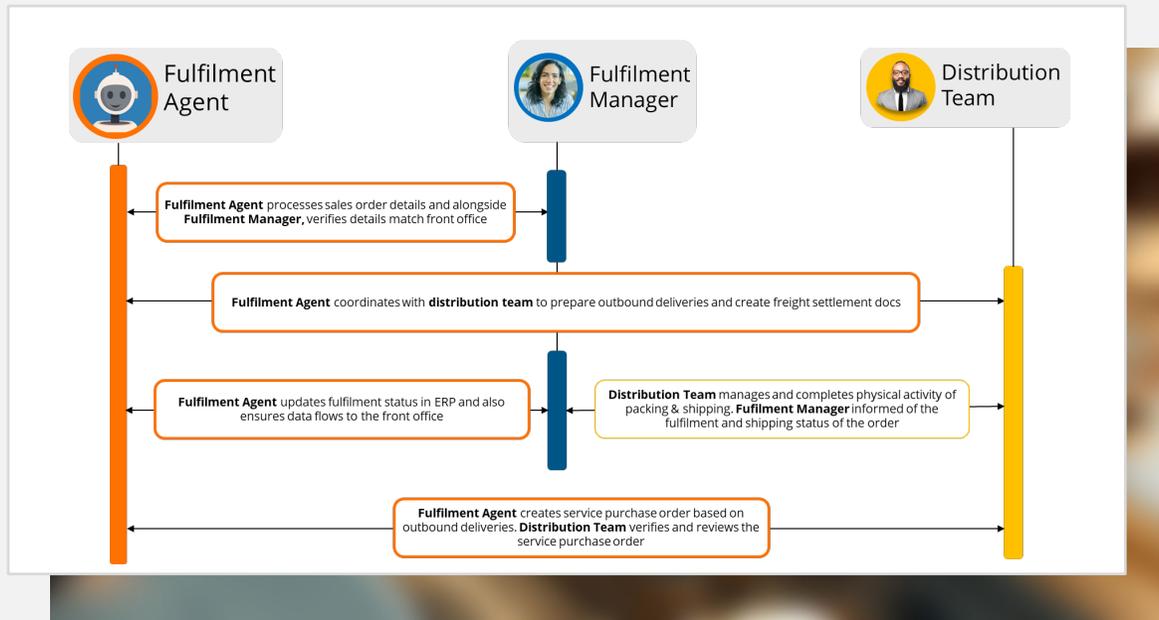
Shipping Coordination ★

Drive coordination of outbound delivery with distribution team and create freight documents & purchase orders on their behalf



Front Office Sync ★

Automatically transmit the order to the back office with accurate details, while continuously updating the front office on fulfillment progress.



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