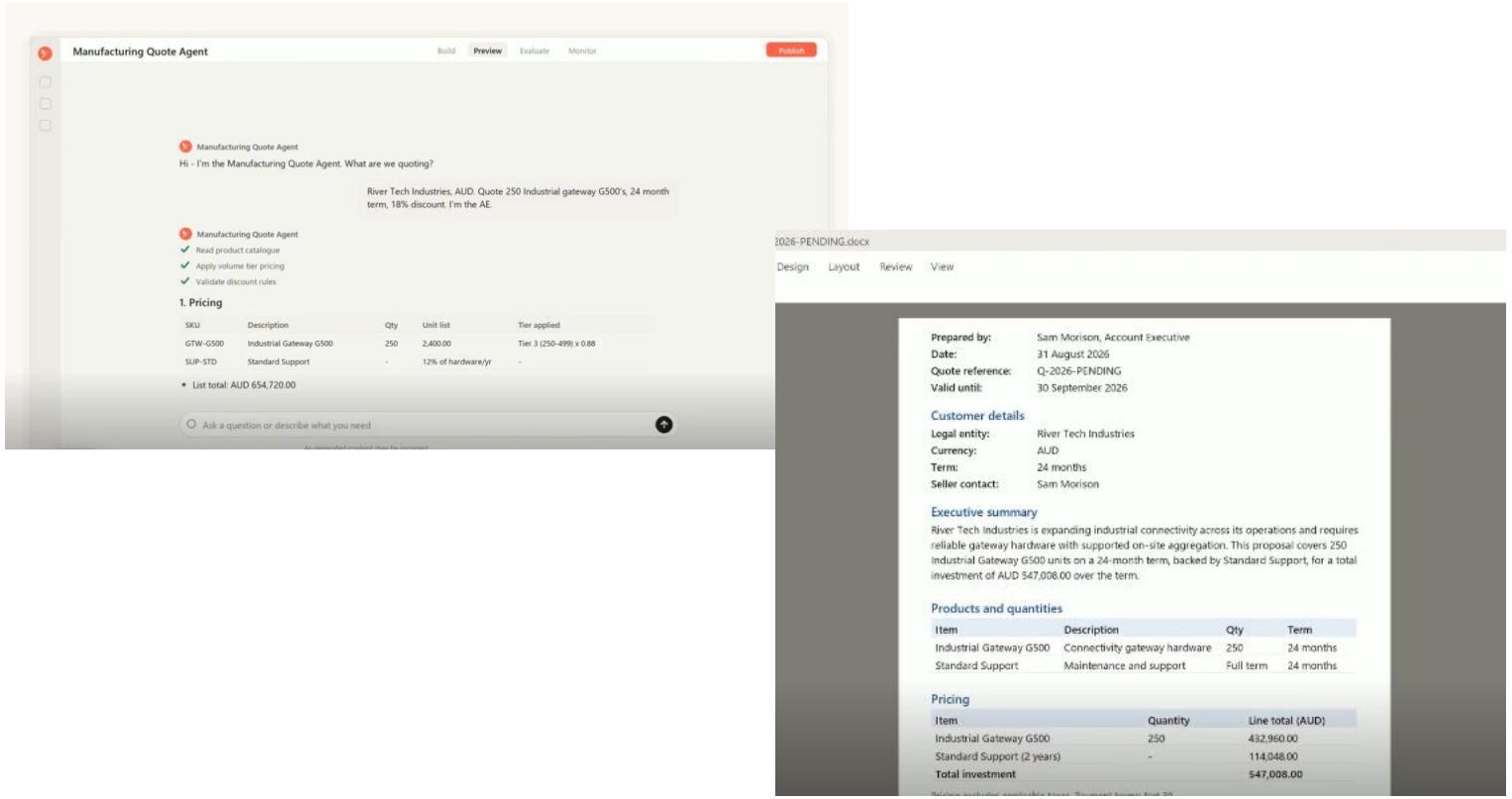
GENERATIVE AI | ACCELERATOR

Manufacturing Quote Agent

Quotes priced from the catalogue, discounts checked against policy, and approval routed before anything reaches the customer.

Copilot Studio
Build low-code agents

Microsoft 365
Outlook · Word · Excel



PURPOSE
Turns a seller's plain-language request into a compliant quote — real SKUs, volume tiers, validated discounts, a customer-ready Word proposal and an Excel workbook with live formulas.

PROBLEM
Quoting lives in spreadsheets and inboxes. Sellers don't reliably know the current catalogue, tier multipliers, family discount caps or who signs off — so a confident wrong price goes out and approval gets skipped.

IMPACT
Every price cites the rule and row that produced it. A discount above the seller's authority is named, banded and routed — the agent drafts the approval, never grants one, and never emails without an explicit yes.

PLATFORM
Copilot Studio agent · six skills · six policy documents as knowledge · Office 365 Outlook · Word and Excel generation

CAPABILITIES

Catalogue Pricing | Volume Tier Logic | Discount Validation | Approval Routing | Word Proposals | Live Excel Workbooks

INDUSTRIES

Manufacturing | Industrial Equipment | Wholesale & Distribution | Energy & Utilities | Construction | Automotive

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Solution architecture

01 EXPERIENCE

Seller conversation

Build a quote
Plain-language ask in, priced line items out

Validate a discount
Checked against family caps and authority bands

Route for approval
Approval email drafted, held until confirmed

02 APPLICATION

Copilot Studio agent

Six skills, one agent
Each skill carries its own activation rules, so the agent picks the path.

Pricing
configure-and-price · renewal-quotes

Policy
discount-rules · approval-routing

Output
proposal-drafting · quote-workbook

Tool: Send an email (V2) via Outlook

03 INTELLIGENCE

Grounded reasoning

The model reads whole policy documents, never snippets — a truncated pricing table produces a confident wrong number.

Cites every rule | **Invents no number**

Anthropic Sonnet 5
Reasons over the catalogue and writes the prose. It never sets a price the rules did not produce.

Pricing lives in the knowledge base, not in the model.

Knowledge documents
Catalogue, pricing rules, discount policy, approval matrix, renewal policy, quote standards

Office 365 Outlook
Approval email sent from the seller's mailbox — only on an explicit yes

Word & Excel output
Customer proposal at net prices; internal workbook with live formulas

Microsoft Entra ID
Group-membership access control on the agent; authenticated users only