SALES AND REVENUE · AGENTFORCE EMPLOYEE AGENT

Quote Request Agent

Builds a quote from a rep's Slack request, checks the discount against policy and routes it for approval.

An Agentforce Employee Agent that lets a rep request a quote in Slack. The agent finds products, builds the Quote with line items, checks the discount against a policy table and submits it for approval when the discount is above the rep's limit. Quotes no longer wait on sales operations.



3	2	5	2	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Product search
Matches names to price book entries.

Quote build
Creates the Quote and lines.

Discount and approval
Checks policy and submits.

THE RULES IT FOLLOWS

- Discount of 10 percent or less saves with no approval; above 10 up to 20 needs manager approval; above 20 up to 30 needs Finance approval; above 30 is blocked with a message to contact Sales Operations.
- The agent never edits list prices or creates products.
- Quotes are created only on opportunities the user can edit.
- Always show total, discount and approver before submitting.

NOT INCLUDED

- PDF generation, contracts and e-signature.
- Multi-currency, tiered pricing, CPQ bundles.
- Editing quotes after approval.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Sales Cloud with Quotes enabled; Revenue Cloud or CPQ optional; Agentforce

BEST FOR
Account executives, sales operations, inside sales teams, deal desk teams and sales managers

INDUSTRIES
B2B software with a price book · Business services · Manufacturing · Distribution · Industrial supplies · Telecommunications · Medical supplies · Wholesale

WHAT YOU NEED

- ✓ Quotes enabled and a maintained price book.
- ✓ Your discount policy and approvers.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER