AI SALES: FROM ERP TO THE RIGHT QUOTE IN 5 MINUTES.

WE DON'T CHANGE YOUR ERP — WE MAKE IT SMARTER!
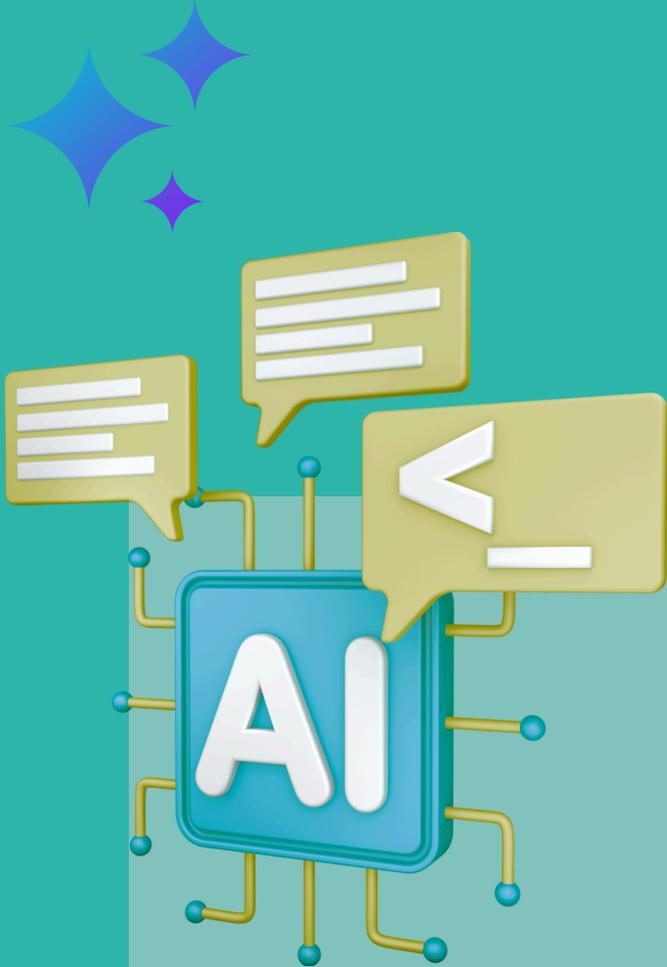
OPTI

Smarter, Safer, Scalable

www.opti.ro/en

OPTI

Smarter, Safer, Scalable

Google Cloud Partner · HubSpot Partner · ISO 9001 · ISO 27001

REVIEWED ON Clutch ★★★★★ 17 REVIEWS

OPTI is a software company that helps you reduce costs and work more efficiently through automation and data migration. We have been active since 2005, with multichannel experience in retail, healthcare, publishing, and gaming.

We are ISO 9001 and ISO 27001 certified, as well as a HubSpot Solution Partner and Google Cloud Partner. You can rely on us for secure, modern, and future-ready projects.

Services:

- **Cloud:** scalable architectures, administration, automation, and monitoring.
- **Data & BI:** advanced solutions that turn data into actionable insights.
- **ERP/CRM Integration:** assessment, integration, and data migration for simplified workflows.
- **Custom Software:** web apps, mobile apps, and platforms built quickly and flexibly.
- **UX/UI Design:** intuitive and user-friendly digital experiences.

Your ERP, smarter than ever

Fast, accurate quoting with AI Sales, powered by your existing systems.

Don't replace your ERP (Senior, Charisma, WinMentor, Pluriva, etc.), make it work harder for you. **Cut quoting time by 70%** and enable e-commerce or internal sales chatbots. Remove catalog filtering, **generate accurate quotes in 5 minutes, and grow your sales.**

-68%
time per quote

The sales team gains more than 25 minutes on every quote. Instead of manually searching for products and cross-checking information, agents can respond to customers almost instantly, keeping interest high and increasing the chances of conversion.

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Sales with AI

Choose client

Optic Dock Ltd

0 orders. Last order: 17.04.2025

Delivery address:

-

OPTI

☐ **Optimized Loop Group**

0 offers. Last order: -
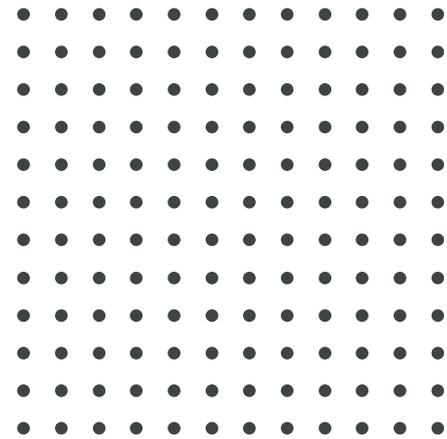0 invoices. Last invoice: -

☑ **Optic Dock Ltd**

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Why AI Sales?

Designed for **companies with more than 100 employees and over 1,000 SKUs**, the system is built on a scalable Google Cloud architecture **(GKE, Cloud Run, Vertex AI, BigQuery).**

Common problems solved:

- **Long quoting times** — each quote takes 30–60 minutes, involving excessive copy-paste, repeated checks, and customers waiting too long.
- **Product/package lookup errors** — confusion between similar items, unnecessary returns, and complicated verification steps.
- **Missed upsell opportunities —** no automated or centralized recommendations at the management level.

Manual Quoting vs. **AI-Driven Sales**

Classic Process	Our Process
Slow search: The agent must search by exact codes. If they type a title and miss a character, the ERP returns nothing.	**Semantic search:** AI understands "screws for concrete" and finds the correct items - even without a code.
Manual stock checking: Open three different windows to check stock across multiple warehouses.	**Total visibility:** Stock from all warehouses and the customer-specific price are displayed instantly.
Missed upsell: In the rush, the agent forgets to suggest accessories (washers, consumables).	**Automatic upsell:** The platform automatically suggests complementary products defined by the manager.
Time: 30–60 minutes for a complex quote.	**Time:** Under 5 minutes for the same quote.

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What we deliver: time, efficiency, sales

OCR and voice transcription

Extracts products from large PDFs, recognizes handwriting/photos for written notes, and supports voice commands.

Semantic and hybrid search

Finds products "by meaning," not just by code. Google Cloud AI technologies infer and complete customer intent.

Complementary products

We define your business rules and machine learning rules for adaptation and upsell (e.g., screw + washer).

Real-time synchronized data

Multiple price lists, product details, sales and customer history, catalog items — refreshed quickly (e.g., every 15 minutes).

Quote-building dashboard

Each sales agent has access to a dedicated dashboard for generating quotes quickly while respecting shared limits and rules.

Sales chatbot

Trained on your catalog, answers anytime (24/7) on your ecommerce site, collects leads, and schedules meetings.

Automated upsell,
measurable impact

-68%
time per quote

From 33 to 7 minutes

<1%
catalog lookup errors

Down from 5%—10% incorrect searches on average

+14%
average order value

AI recommendations generate upsell

<2 mo
delivery time

The platform was delivered in just 7 weeks

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Sales with AI

Choose client

Optic Dock Ltd

0 orders. Last order: 17.04.2025

Delivery address:

-

| Client |
| Transcription |
| Retail/Gemini Search |
| Related |
| Retail Search |

OPTI   Search for

☐ **Optimized Loop Group**

0 offers. Last order: -
0 invoices. Last invoice: -

☑ **Optic Dock Ltd**

0 offers. Last order: -
0 invoices. Last invoice: -

Optimized Holdings Alliance

0 offers. Last order: -
0 invoices. Last invoice: -

Details

Create offer

Preview offer
Optic Dock Ltd

Shipping price: Euro
Observations:

Text

Send as offer   Sen

AI Sales Implementation Phases

Analysis & Data
Objectives, product catalog, attributes

ERP Integration
API / ODBC / CSV / RPA + price, unit, and stock mappings

Gemini AI Pilot (2–3 weeks)
OCR, voice transcription, and semantic search on real data

Testing Period (30 days)
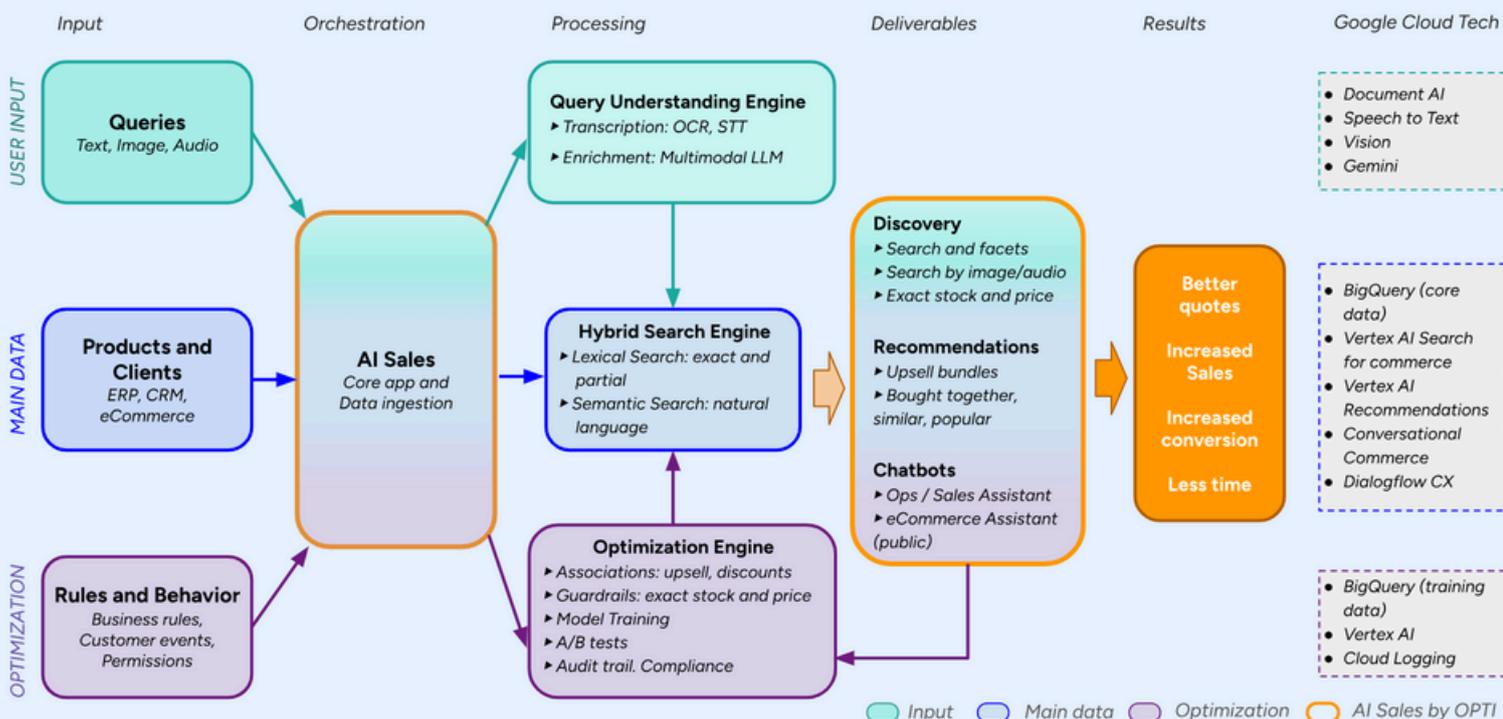Real agents, chatbots, and sales reporting

Stable Operation
Continuous optimization and A/B testing

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AI Sales by OPTI - Architecture and Value Flow Diagram   www.opti.ro/en/ai-sales

Input | Orchestration | Processing | Deliverables | Results | Google Cloud Tech

USER INPUT

Queries
Text, Image, Audio

Query Understanding Engine
▸ Transcription: OCR, STT
▸ Enrichment: Multimodal LLM

- Document AI
- Speech to Text
- Vision
- Gemini

MAIN DATA

Products and Clients
ERP, CRM, eCommerce

AI Sales
Core app and Data ingestion

Hybrid Search Engine
▸ Lexical Search: exact and partial
▸ Semantic Search: natural language

Discovery
▸ Search and facets
▸ Search by image/audio
▸ Exact stock and price

Recommendations
▸ Upsell bundles
▸ Bought together, similar, popular

Chatbots
▸ Ops / Sales Assistant
▸ eCommerce Assistant (public)

Better quotes
Increased Sales
Increased conversion
Less time

- BigQuery (core data)
- Vertex AI Search for commerce
- Vertex AI Recommendations
- Conversational Commerce
- Dialogflow CX

OPTIMIZATION

Rules and Behavior
Business rules, Customer events, Permissions

Optimization Engine
▸ Associations: upsell, discounts
▸ Guardrails: exact stock and price
▸ Model Training
▸ A/B tests
▸ Audit trail. Compliance

- BigQuery (training data)
- Vertex AI
- Cloud Logging

◯ Input   ◯ Main data   ◯ Optimization   ◯ AI Sales by OPTI

Compatible ERPs

Romania: Senior ERP, Charisma, Entersoft, Magister, Pluriva - via API, ODBC, RPA, or scheduled imports (CSV or any other format)

International: Microsoft D365, SAP Business One, and others.

Available Packages

1 INTERNAL SALES

- Quote generation in 5 minutes
- Romanian ERP integration
- 1 upsell per category (max. 7)
- 1 internal search chatbot
- Agent dashboard
- Warranty and technical support

2 ECOMMERCE STARTER

- All features from Internal Sales
- Ecommerce integration: Woo/Magento/Custom
- Multiple upsell rules
- Public website search chatbot
- Sales reports
- SSO or login integration

3 OMNI-CHANNEL SALES

- All features from Ecommerce Starter
- CRM integration: HubSpot etc.
- Chatbots with custom flows
- Continuous optimization
- Search reports (A/B testing)
- International ERP: D365, SAP

We don't replace your ERP; we make it smarter!

REQUEST A DEMO   office@opti.ro

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