



Smarter, Safer, Scalable

Upgrading Entersoft ERP Sales Work with AI: Cutting Quoting Time by 68% for an Industrial Distributor

CASE STUDY

Industry: Wholesale Distribution

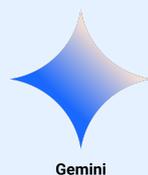
Client: Distributor (confidential)

Year: 2025



The client was a B2B company operating in the industrial wholesale distribution sector, with a catalog of over 20,000 SKUs. As a key supplier for businesses in manufacturing and light industry, they relied on **Entersoft ERP to manage stock and orders**. However, their sales team spent **up to 45 minutes preparing each quote**, frequently dealing with time-consuming manual searches and difficulties in identifying the correct product codes, with a zero-result rate estimated at 15%. Returns were also present due to the difficulty of the salespeople who worked in the office to identify the items inferred from the clients by the agents in the field.

To address these inefficiencies, OPTI developed an **AI-powered quoting platform** without modifying Entersoft ERP. The solution included a responsive web app available from afar, advanced search features, and a **RAG-enabled (Google Gemini) chatbot** embedded in the platform. This dramatically streamlined offer creation, eliminated zero-results when searching, and enabled **upsell recommendations** based on the past-year import of all orders processed by the company.





CHALLENGES

The sales team faced a quoting process that was slow, error-prone, and lacked the intelligence needed to support upselling. The following goals were set:

1. Reduce Quote Preparation Time



Sales reps were spending **up to 45 minutes per quote** due to manual ERP searches, highlighting the need to streamline the offer creation process.

2. Eliminate Product Selection Errors



Frequent errors in selecting the correct SKU or price, caused by similar product names and multiple pricing tiers, highlighted the need for smarter search and data integration to ensure accuracy.

3. Enable Smart Upselling



The **lack of complementary product recommendations** limited order value, especially for juniors not accustomed with the large product catalog, prompting the need for automated upsell suggestions.



SOLUTION

OPTI developed and implemented the [AI Sales](#) quoting platform fully integrated with Entersoft ERP holding the 20.000+ items. Key components:

1. Web-Based Quoting App with ERP Sync

- ✓ A responsive, JavaScript frontend application with user authentication, connected to Entersoft ERP via API with automatic stock and price refresh every 15 minutes.

2. Smart Quoting Interface

- ✓ Fast SKU search, visibility of four price types (minimum per specific client, average per specific client, general minimum, general average), manual discounts, and user x client specific permissions, with the ability to save drafts.

3. AI Features Powered by Google Gemini

- ✓ OCR for handwritten notes and PDFs, Voice transcription for Romanian, hybrid product search, automated suggestions for complementary items, and a RAG-enabled (Google Gemini) chatbot embedded in the platform.

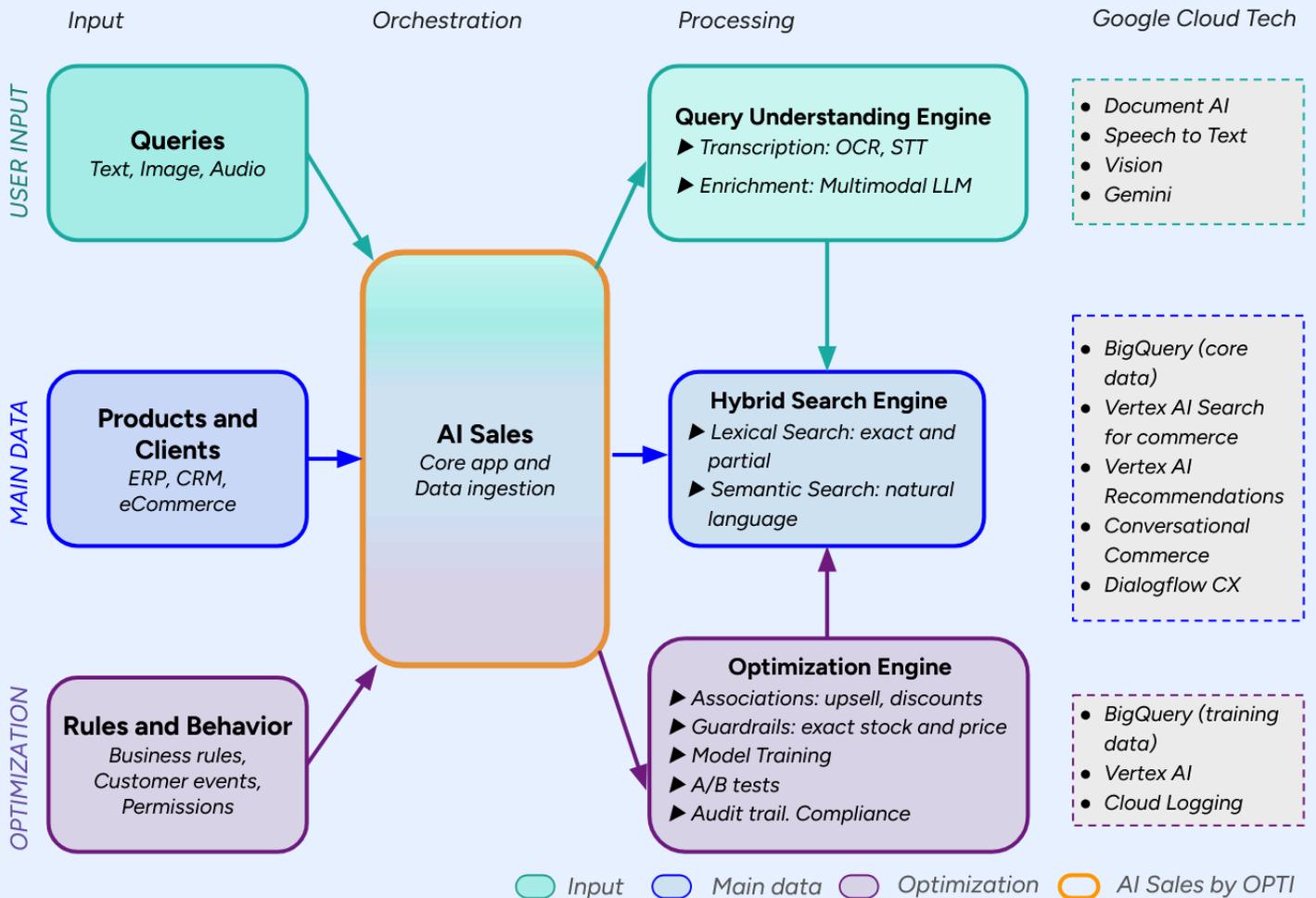
4. Security and Data Cleaning

- ✓ Security is achieved via 2FA and Role-Based Permissions (ISO 27001 standard). Data cleaning was in-house.



ARCHITECTURE – FROM ERP TO AI

AI Sales Quoting Software orchestrates Google Cloud Tech on three pillars: *User Input*, *Main Data* (ERP, but also CRM or website) and *Optimization*, all three originating on the client business side.



A WORD FROM THE TEAM



“Building a smart middleware with a single business function is an attractive challenge. We use Google Cloud tools mostly via API to search transactional data extracted from the original ERP”

– Daniel Curculescu, Software Engineer



RESULTS (2 MONTHS LATER)

200 Hours of Development Planned, Delivered in 7 Weeks



-68% Average Quote Preparation Time

Reduced from 23 minutes to just 7 minutes per offer.



< 1% Product Code Errors

Improved accuracy in quotes and orders, eliminating costly returns.



+14% Increase in Average Order Value

Thanks to AI-driven recommendations for complementary items like fittings and gaskets.



Field Mobility Unlocked

Transformed a desktop-only ERP workflow into a mobile-first experience, allowing agents to note deals on-site.



Permission Integration

Salespeople only see the clients they are attributed in Entersoft ERP



15 Minute Sync Interval

Prices, stocks and other product details sync automatically at max. 15 minutes.

Want to see it in action? Schedule a **free demo** on the dedicated product page. [Let's talk](#)

Apex Services Corporation

Customer details

Customer code: SYLA-7995
 VAT number: DE0028846
 Company type: State
 Phone: +34 832-9901
 Country: Romania

Previous offers | Previous invoices

BID-2022-4E1C8 (16.06.2025)

Order total: 188535.54 Currency: LEU

SKUs	Title	Description	Price	Amount
PROD-FILP-OTG-DN800-PN25-L1500-4	Duplex stainless steel Containerized osmosis station	Modular internal compartments for flow segregation. Intended for HVAC applications in industrial halls. Calibration tables preloaded in the equipment memory. Traceable materials 3.1 according to EN 10204.	756.03	2
PROD-MANP-FNT-DN400-PN10-L3000-N	3-way mixing valve Tank [volume] L	Replaceable neoprene perimeter seals. Optimizes the transition between liquid and gas phases in multi-media installations. Compatibility with IO-Link sensors for advanced diagnostics. Supports electronic audit trail according to CFR21 Part 11.	7.93	40
PROD-ILUM-PPH-DN315-PN25-L1200-H	Duplex stainless steel Containerized osmosis station	Galvanized HEA profile sleepers for equipment support. Stabilizes downstream pressure through adaptive algorithms. Predictive notifications through REST API.	455.52	2

Intuitive tabs allow users to switch between past offers and invoices.

Nordic Jacket (Selected) | Details | Orders (2)

Amount: 3 | Price: 26.82€ (Selected), 62.49€ (Manual), 6.49€ (Discount %)

26.82€ 62.49€ 6.49€

Men winterjacket Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud

SEE THE PRODUCT

Nordic winter jacket - black | Details | Orders (45)

221.25€ (List price) | 221.25€ (Selected price) | Code: SKU-321-DRE | Stock: 33

Men winterjacket Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud

SEE THE PRODUCT

Show less

Add

Preview offer
 Apex Services Corporation

Shipping price: Euro price

Irvine winter jacket | Details | Orders (2)

26.82 EUR × 3 m **80.46 EUR**

Code: SKU-30808-RHINO Stock: 30

Men's 2-in-1 winter jacket with detachable hood. Made of 100% polyester, offers a water resistance of 3.000 mm, vapor permeability 3.000 g/m2/24h, Padded interior, fleece collar, sleeves with adjustable cuffs, intar seams

SEE THE PRODUCT

Observations:

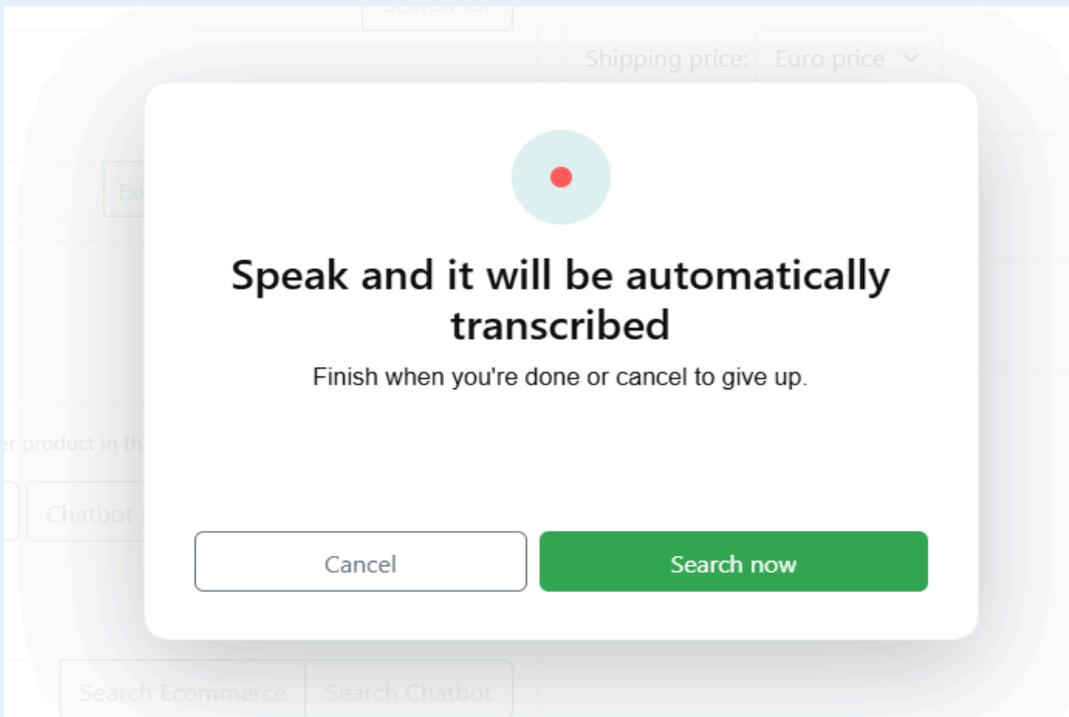
Text

Send as offer | Send as order | Save

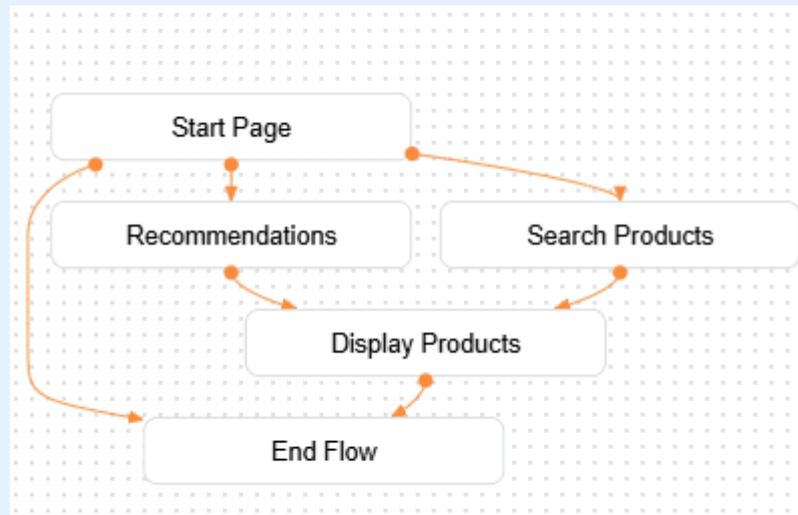
The system provides automatic product matches with details like catalog price, minimum and maximum prices, code, stock, pic, website link, full details.

Create offer My offers Your profile		
#69. LUBA-1586	Number of products: 1	2025-11-21 09:54:23 Edit
#55. CL-06494	Number of products: 1	2025-09-26 10:15:06 Edit
#53. CL-06494	Number of products: 1	2025-09-26 10:10:24 Edit
#51. CL-06494	Number of products: 1	2025-09-26 09:55:47 Edit
#50. CL-06494	Number of products: 1	2025-09-26 09:54:16 Edit
#49. CL-06494	Number of products: 1	2025-09-26 09:53:34 Edit
#48. CL-06494	Number of products: 1	2025-09-26 09:22:50 Edit
#47. CL-06494	Number of products: 1	2025-09-26 09:11:40 Edit
#46. CL-06494	Number of products: 1	2025-09-26 09:10:06 Edit
#34. CL-06494	Number of products: 1	2025-09-26 08:32:40 Edit

See your past orders



AI finds products for you, even recognizes handwriting with Google Vision and speech from any microphone with Google Speech to Text.



The platform includes a Gemini-powered search assistant which speaks any language. Custom chatbot flows adapted to the business logic of the client can also be implemented, such as for support desks.

****all pics are from the available demo platform. Please contact us for details.***

TECH AND METHODOLOGY

Services: Software development, AI Sales Enablement

Google Cloud Tech: Google Cloud, Google Gemini, Document AI, Speech to Text, Vision, BigQuery, Vertex AI Search, Vertex AI Recommendations, Dialogflow CX, Cloud Logging, ERP systems

Methodologies: OCR, Speech-to-text, Semantical search, Lexical search, Upsell rules, Model Training, A/B tests, Audit & Compliance, Integration via API, SQL, CSV, RPA.

Standards: ISO 9001 (quality), ISO 27001 (information security).

CONTACT US

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READ MORE

- ⇒ Read a case study on [Financial Sentiment Analysis with GenAI and Google Cloud](#) - for document processing use cases of AI
- ⇒ Discover the [AI Sales Platform](#) → for large ERP catalogs and multi-channel sales
- ⇒ See our [Guides for Integrating AI in B2B Flows in 2026](#) →
- ⇒ See our [Software Development Hub](#) →

OPTI Software

Intelligent Business Processes. Scalable Results.

OPTI builds software, AI agents, and HubSpot integrations on Google Cloud - with DevOps and ISO 27001 certifications.

Founded in 2005, OPTI has a team of senior analysts and programmers, is a HubSpot Solution Partner, Google Cloud Partner and certified in more technological stacks.

CERTIFICATIONS



KNOW-HOW

