

# Interview Summary

Aniia	facilitator
Samat	clarification on the technical block question
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## 1. Stakeholders

- Aitmukhamed (Sales Manager): The main user of the bot, responsible for working with commercial offers in Excel daily. He will conduct usability testing and provide feedback.
- Nursultan (Technical Stakeholder): Author of the project and responsible for technical decisions. Nursultan will make key decisions and guide the development direction of the bot.

## 2. What problem we are solving (AS IS)

- Manual. The current process of creating Commercial offers is manual, relying heavily on Excel, which is inefficient, especially when working in the field.
- Limitations of previous solutions. The previous bot developed by the BA team failed to deliver value due to lack of artificial intelligence (LLM), requiring manual validation at every step.

## 3. Goals for the chatbot

- The chatbot should speed up the procurement process, improve accuracy, and reduce costs.
- The bot will automatically process customer requests, match them to the SATU database and generate Commercial offers in Excel and PDF.
- Sales managers should be able to create Commercial offers with minimal manual effort, even while away from their laptops and without access to Excel.

## 4. Future Process (TO BE).

- The bot will process incoming requests, analyze the information and suggest products. The sales manager will confirm the selection and form a Commercial offer. The bot will reduce the number of clicks in the interaction using a simple Telegram interface with buttons and menu items.

## 5. Limitations

- Product Limit: In the first version (MVP), the bot will process no more than 15 products per request. Processing large lists of products will make the process more complicated and will be considered in the future.
- Input formats: The initial version (MVP) will only support text queries. Screenshots and audio messages will be considered in future iterations.
- Currency support: While multicurrency is not required, the bot should automatically update currency rates for items purchased in other currencies (e.g. rubles, euros).

Manual value-added adjustments (e.g., to mitigate exchange rate fluctuations) will be done through the bot interface.

- Basic functionality first: While features such as editing offers and saving them for later use are necessary, the initial release will focus on creating basic functionality for

#### 7. Key Features for MVP

- Product recognition by name and article code.
- Support for processing up to 15 products per request.
- Interface based on Telegram with basic validation before generating Excel and PDF files. creating Commercial offers.

#### 8. Monitoring progress

- Weekly meetings with Aitmuhammed and Nursultan will allow progress to be monitored. Regular validation of requirements through MVPs is expected, with a focus on quick feedback rather than in-depth technical specifications.

## Full list of Q&A

group of questions	questions	answer
<b>Stakeholders</b>	Can you name the key stakeholders on your side who will be involved in the design and make key decisions?	<p><i>Sales Manager - Aitmukhamed</i>  <i>The main user of the bot, works daily with the process of creating a commercial offers through Excel.</i></p> <p><i>Nursultan is the main stakeholder (responsible for the technical part of the implementation, author of the idea, understands the process and steps of creating a commercial offers).</i></p>
	What roles, functions and responsibilities will each of these stakeholders have?	<i>Aitmukhamed - to conduct demonstrations with this stakeholder, not just to show opportunities, but to conduct usability test, acceptance of works for Nursultan - as well as making key decisions, to determine the vector of development..</i>
	Are any other contractors in related areas related to this project present on the project?	<i>is not required, all necessary technical documentation and assistance can be obtained from Nursultan</i>
	Who will be the primary users of the system?	<i>Main user - Aitmukhamed</i> <i>In the future ONLY sales managers</i>
	Are there different categories of users with	<i>no category for users</i>

	different requirements?	
	Is there a plan to monitor the performance of the work? For example, through regular meetings, use of project management systems ?	<p><i>1 time a week status meeting with Aitmukhamed and Nursultan</i></p> <p><i>2nd meeting validation of req, discuss backlog</i></p> <p><i>Request: validation of requirements through MVP, not to go deep into staging, more frequent demonstrations and getting feedback</i></p>
	What is your preferred communication format ?	<i>Telegram</i>
<b>Analogues</b>	Can you tell me about the products you like or dislike? What do you dislike or like about them?	<p><i>No analogs were found by Steakholder, Excel has been used throughout the entire time and existing sales processes have been in place. The existing template with formulas in Excel is not convenient as a tool that could be used in the "fields".</i></p> <p><i>It was also noted that the Bachelors team had previously developed a bot, but did not bring value as it was just an integration with SATU without ChatGPT, a lot of actions had to be done manually, the bot literally asked for validation and verification of each step. To summarize, the reason for not accepting work from the Bachelors team: very much manual work, there was no LLM</i></p> <p><i>*Agreements: (the previous bot from the Bachelors team will be able to provide Nursultan for analysis and further re-use, Nursultan hopes it is possible to improve this bot with AI)</i></p>
	Is there a preference for design and structure? (screenshots)	<p><i>Get rid of a lot of clicks and user interaction. Use the TelegramBot interface - buttons and menu items. The bot should match article titles from the query with what is on the SATU site, this functionality should eliminate a large number of clicks and interface elements.</i></p> <p><i>The stakeholder notes the advantages of the selected technologies:</i></p>

		<ul style="list-style-type: none"> <li>+ AI understands which endpoint to use, recognizing the request is most important.</li> <li>+ GPT as a client application, but GPT does not know how to send back files, so use AI AGENT - e.g. LangChain Agent understands what action to perform and with what parameters</li> </ul>
<b>Business goals</b>	What challenges do you face with your current solutions?	<p>Stakeholder quote, "The bot helps speed up the procurement process, increase its accuracy and transparency, and reduce data processing and decision-making costs."</p> <p>Stakeholder Quote: "Handle incoming requests with minimal effort."</p> <p>Most often the request from the customer (consumer of goods) is unspecified and the sales manager selects goods based on knowledge of catalogs and years of experience, manually selects and changes quantities and volumes based on the specified limit of the supplier. If the product is not available on SATU's website, the sales manager selects analogs through other trusted suppliers by literally typing the product into the Internet search.</p> <ul style="list-style-type: none"> <li>• <b>Process steps:</b> Request from the client - Processing of the request by the manager, namely selection of goods in Excel - Creation of a commercial offer in Excel and PDF.</li> <li>• <b>Process steps in the future (Customer's expectations):</b> Request from the customer - Manager sends this request to the Bot - Processing of the request by the Bot, suggestion of specific products - Confirmation from the manager of the generated CP (in preview format) or comments on what to</li> </ul>

		<i>fix - Creation of the Commercial offer in Excel and PDF.</i>
	What specific goals do you have for the new Chatbot?	<i>labor reduction work in fields without access to Excel. Fast and non labor-intensive processing of request from companies, recognizing and matching products.</i>  <i>Stakeholder quote: "Do less work and earn more".</i>
	What exactly should the new application contribute to?	<i>Ускоренная обработка заказов и создание коммерческих предложений</i>  <i>Quote from a stakeholder: "I want to be able to create a Commercial offer based on a request with minimal effort on my part. This is especially relevant when I'm not near a laptop and can't use standard tools like excel."</i>
<b>Business process</b>	What does the process look like without the Chatbot? <b>AS IS</b>	<i>Quote from a stakeholder: "We get a request, then find the equipment in the catalog, then check the current prices and enter the items and prices into an excel template. This is then all calculated and we export to pdf. This is a rough un-detailed standard scenario for creating a Commercial offer. "</i>  <b><i>The detailed steps of the AS IS process that Aitmuhammed was able to demonstrate at the meeting:</i></b> <ol style="list-style-type: none"> <li><i>1) The request from the client comes in the form of a table with the names of goods and the required quantity</i></li> <li><i>2) The manager updates the Excel template, i.e. systematically once a week uploads currency rates (tenge, ruble, euro), determining the additional markup to the rate. Adds a separate tab with a table on the availability of goods.</i></li> <li><i>3) In the Excel template should be loaded tables with goods - article, cost, unit of</i></li> </ol>

		<p>measurement.</p> <ol style="list-style-type: none"> <li>4) Then, having compared the request from the client with what is on the tabs, i.e. with the information unloaded from SATU, the manager starts to create a Commercial offer from the rows.</li> <li>5) The exact names of goods and other attributes of the goods (pictures, unit of measurement, etc.), which are located on the neighboring tabs, are pulled up by articles. (via Excel formulas).</li> <li>6) Next, the number of products, total markup, delivery markup are manually adjusted based on the final amount and margin information.</li> <li>7) Final validation of the sums is carried out and the file is saved in PDF format.</li> <li>8) Commercial offer file in PDF format is sent to the Customer..</li> </ol>
Functional and System Requirements	<p>What should be the logic for generating commercial offers in Chatbot?</p> <p><b>TO BE</b></p>	<p>Stakeholder quotes, "The client sends a query in the format they prefer. Then we need to search our database."</p> <p>Stakeholder quotes: "To replace Aitmuhamed's smart assistant."</p> <p><b>*Limitations agreed with Aitmukhamet for the TO BE process:</b></p> <ol style="list-style-type: none"> <li>1) A moderate number of items (requests from the customer) that is possible to fulfill with the bot = 15 items has been defined, a large number of items will make it difficult to work with the bot.</li> <li>2) The incoming request from the customer that the sales manager passes to the bot will be in text format for MVP 1. Screenshots and audio messages will be in further development.</li> </ol>

		<p>3) <i>Multicurrency is not required</i>  4) <i>One supplier of items</i></p> <p><b>TO BE Process:</b></p> <ul style="list-style-type: none"> <li>• <i>A request is received by the manager from the Customer</i></li> <li>• <i>The manager redirects the request from the client to the bot without processing it</i></li> <li>• <i>The bot analyzes the request -&gt;</i></li> <li>• <i>understands whether clarifying questions are needed or not-&gt;</i>  <i>(example: there is not enough information, the request is not clear)</i></li> <li>• <i>asks a clarifying question</i></li> <li>• <i>manager writes an answer</i></li> <li>• <i>the bot recognizes the answer and a query in the database takes place</i></li> <li>• <i>Table generation for validation - Preview table with all products and main attributes.</i></li> <li>• <i>If the Bot realizes that the request is accurate (full match by article and no ambiguity) and clarifying questions are not required, a query in the database takes place.</i></li> <li>• <i>Receiving a confirmation from the manager that all found items from the query are correct, quantity and markups satisfy the query. Or at this stage the Manager writes what needs to be corrected.</i></li> <li>• <i>generation of a table for validation, first in Excel, then in PDF.</i></li> <li>• <i>obtained files can be saved on the phone and sent to the client.</i></li> </ul>
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	Should the Chatbot engage in dialogue, answer questions, or just accept commands?	<i>In answering this question, the following restriction was approved: Check the context of the message. so that people don't use the tool as a free chatgpt for any requests</i>
	The format of the input data?	<p><i>The incoming request from the Customer, which the Sales Manager then forwards to the bot will be in text format for MVP 1. Screenshots and audio messages will be in further development.</i></p> <p><i>To summarize: text message</i></p>
	What inputs are needed to create a sales CO (Commercial offer)?	<ul style="list-style-type: none"> <li>• Name,</li> <li>• item number</li> <li>• quantity,</li> <li>• unit of measurement</li> <li>• price per unit</li> <li>• <math>\text{quantity per unit} = \text{price} * \text{quantity}</math></li> <li>• total amount</li> <li>• shipping cost</li> <li>• stock confirmation</li> <li>• delivery terms</li> </ul>
	Which operation in ChatBot results in the creation of a Commercial Offer ? Can you give examples?	<ol style="list-style-type: none"> <li>1) Found goods from SATU catalog</li> <li>2) Added quantity information</li> <li>3) Calculated discount</li> <li>4) Calculated shipping cost</li> <li>5) Button "Form CO" - received approval from the user for Excel and PDF formation</li> </ol>
	Is it required to search for a product by category ? (YES/NO)	<i>Resolved to postpone for further development</i>
	What should be included in each commercial offer ? Is there a CO template ? Can you provide samples or style preferences ? What is	<p><i>A quote: "Yes, in excel and pdf. The primary is pdf."</i></p> <p><i>PDF (primary) and excel (secondary)</i></p>



	the file format?	
	How should a Chatbot respond to different requests or situations?	<ol style="list-style-type: none"> <li>1) <i>Sent a screenshot, audio message</i></li> <li>2) <i>The goods are not from catalogs of SATU site</i></li> <li>3) <i>Item is not in the database</i></li> <li>4) <i>Specified quantity is more than stock</i></li> <li>5) <i>Specified quantity is not complete (package limit 3 meters, request for 0.3)</i></li> </ol>
	How should the Chatbot respond to insufficient information from the user?	<i>On insufficient data the bot enters into a dialog with the Sales Manager, specifies what to correct and add in the Commercial offer.</i>
	Should Chatbot be able to offer alternative solutions or suggestions?	<p><i>If there was an unspecified product name in the query, for which it is impossible to find a 100% match, it is required to specify output variations based on the results of the database search.</i></p> <ul style="list-style-type: none"> <li>- <i>Example of actions:</i></li> <li>- <i>“Need a nail” (query)</i></li> <li>- <i>“There are 10 such variations found, please specify the size and material.”</i></li> </ul>
	How will the information be kept up to date?	<i>Product availability is checked at the step before the final preview table is created, when all products are found, and no more clarifying questions about whether it is the same product are required.</i>
	Will there be an option for users to edit the offer or save it for future use?	<i>“It is necessary, but given the time constraints, it is better to focus on the core function”</i>
	Do prices in different currencies need to be taken into account? (YES/NO)	<p><i>No, only Kazakhstani tenge.</i></p> <p><i>But the exchange rate needs to be updated in the bot, as the goods purchased from the supplier can be in rubles and euros. At the moment, the Manager loads the actual exchange</i></p>

		<i>rate into the Excel template, then adds to the ruble rate an added value of 10 kopecks to level out the exchange rate fluctuations. The same process will be required in Bot, only the work with the actual exchange rate should be automated through integration. The added value will be adjusted by a button in the menu.</i>
	Is it necessary to store offers in a database and have a dashboard to view offers, their current status (paid/rejected/postponed) and analytics?	<i>It's necessary, but given the time constraints, it's better to focus on the main function</i>
	What are the key features that should be in the first version of the product (MVP)?	<ol style="list-style-type: none"> <li>1) Customer's (main stakeholder's) wish:</li> <li>2) recognition of goods by name and article code</li> <li>3) user-friendly bot interface for 15 products (working with a list)</li> <li>4) validation of the list of goods before creating Excel</li> </ol>
<b>Integration with other systems</b>	Do you need integration with existing systems?	<i>"satu.kz, telegram u chatgpt"</i> <i>Интерфейс: telegram u chatgpt</i>
	What data formats or APIs are used by existing systems for integration?	<i>API (<a href="https://public-api.docs.satu.kz/">https://public-api.docs.satu.kz/</a>)</i>
<b>Technical unit</b>	Should any specific technologies be used for a Chatbot?	<i>chatgpt</i>
	How fast should a Chatbot respond to queries ? Response time ?	<i>API dependency</i>
	How should ChatGPT be used?	<i>Process the initial request, search for the product in the database, and clarify whether it is the right product.</i>
	What is the structure of the product database and how will it be accessed?	<i>"API satu.kz, we will give you an access token to the actual API or its clone."</i>
	How does api satu work and how will we access it?	<i>Search: by name by item ID</i>
	Probable problems accessing satu and asb -	<i>"API satu.kz, we will give you an access token to the actual API or its clone."</i>

	documentation ?	
	Are specific chatbot settings required via telegram settings: inability to forward messages, take a screenshot ?	<i>MVP 1 is not required</i>
<b>KPI Success indicators</b>	What key performance indicators (KPIs) will be used to measure the success of the Chatbot?	<i>eduction of order processing time by Manager by 50%</i>