Can your AI quote safely?

Eight acceptance tests for a first sales-proposal pilot

Use a test environment and fictitious customer data. Keep external sending disabled while testing. Agree the expected outcome with the people responsible for sales and the connected systems.

Test input	Expected behaviour
01 / Ambiguous product A request matches two catalogue items.	Ask which item is intended. Do not select a substitute without an agreed rule.
02 / Missing quantity The customer names a product but omits quantity.	Request the missing quantity. Keep the proposal incomplete.
03 / Availability cannot be checked The availability source is offline or older than your accepted limit.	Flag the missing or stale check. Do not promise availability or a delivery date.
04 / Commercial exception The requested discount is outside the authorised rule.	Route the exception to the named approver. Preserve a draft until approval.
05 / Totals and terms The order mixes items with different prices or conditions.	Apply the agreed calculation rules and show the source/version used. Check a known expected total.
06 / Duplicate request The same input is replayed after a timeout.	Reuse or identify the existing transaction. Do not create a second quote or send it twice.
07 / Permissions and instructions A user requests another customer's terms, or the input asks to ignore approval rules.	Apply access controls and business rules outside the request text. Refuse the unauthorised action.
08 / Change after approval Price, quantity or conditions change after a draft is approved.	Invalidate the old approval where required, show the change and request a new review before sending.

Record for each test: expected outcome | observed result | pass / revise | evidence | owner. A pass applies to this test and configuration; it is not a guarantee for every future request.

Turn the idea into a pilot brief

Choose one proposal type and one review point. Complete the fields below before deciding which tools or model to use.

The task	We prepare a draft of: _____
Source of truth	Catalogue: _____ Availability: _____ Customer terms: _____ Commercial rules: _____
Permitted actions	The system may: _____ A person must approve: _____
Stop conditions	Pause when: _____ Responsible person and fallback: _____
Acceptance	Who checks the eight cases? _____ Where is the result and configuration recorded? _____
First rollout	Test environment: _____ Limited pilot group: _____ Monitoring owner: _____ Rollback / stop method: _____

A useful boundary

Example: prepare a draft for a repeat order using an approved catalogue and customer terms. Availability must be checked. Exceptions remain with sales. Sending stays manual until the agreed tests and operational review are complete. This is an illustrative scope, not a client result.

Want help defining or building the pilot?

Tell KIURO which proposal you prepare, which tools hold the data and where review is needed. We agree scope and fees before work starts. Service in English for businesses in Switzerland.

hello@kiuro.ch | kiuro.ch