

SOLUTION PROPOSAL

SOLUTION PROPOSAL & QUOTATION

26 SEPTEMBER 2026



AI Order Intake and Routing System

A packaging company processing about 600 orders a month, with sales, finance, production and customer service teams working across Excel, Express accounting, a whiteboard and LINE.

SAMPLE PROPOSAL



PROJECT
AI Order Intake and Routing System

DRAWN BY
**DNA Maker AI
Engineer**

CHECKED BY
DNA Maker engineering team

DATE
26 September 2026

SHEET
01 / 09

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Executive Summary

Orders currently travel from sales to finance to production to customer service through email and LINE, so information is lost and the same data is typed four times. We will build an AI intake and routing system that reads every incoming email and PDF purchase order, extracts the order data once, and creates the tasks each team needs according to your business rules. Every team then works from one order record instead of four separate copies. The result is faster intake, fewer re-keying errors, and a status that customer service can answer without chasing anyone.

SPECIFICATIONS

CLIENT

A packaging company processing about 600 orders a month, with sales, finance, production and customer service teams working across Excel, Express accounting, a whiteboard and LINE.

PROJECT

AI Order Intake and Routing System

OVERALL TIMELINE

5 weeks

DELIVERY PHASES · SYSTEM COMPONENTS

4 · 6

600/month

orders processed

4 times

times the same order data is typed

OUR DIRECTION

AI reads every incoming email and PDF purchase order, extracts the order data once, and creates a single shared order record. A rules engine then decides which team receives which task and routes it to finance and production automatically. Every team works from the same record, so the data is entered once and the status is always current.



Problem Analysis

Four distinct problems were found in the order flow.

1

FINDING 01

Orders Lost in Handoff

Orders pass from sales to finance to production to customer service through email and LINE threads, so ownership at each step is unclear. When a message is missed, the order stalls without anyone noticing, which delays delivery and forces customer service to chase status manually.

2

FINDING 02

Fourfold Data Entry

The same order details are typed four times, into sales Excel, Express accounting, the production whiteboard and LINE. Beyond the hours consumed, each re-typing is a chance to introduce an error that then propagates into invoicing and production.

3

FINDING 03

Manual PDF Reading

Most orders arrive as PDF purchase orders attached to email and are read and re-keyed by hand. This is the slowest point in intake and the one most exposed to misread quantities, item details or delivery dates.

4

FINDING 04

No Single Order View

Because each team keeps its own record, nobody holds the current state of an order. Customer service cannot answer a status question without asking finance and production, and management has no reliable count of what is in progress.



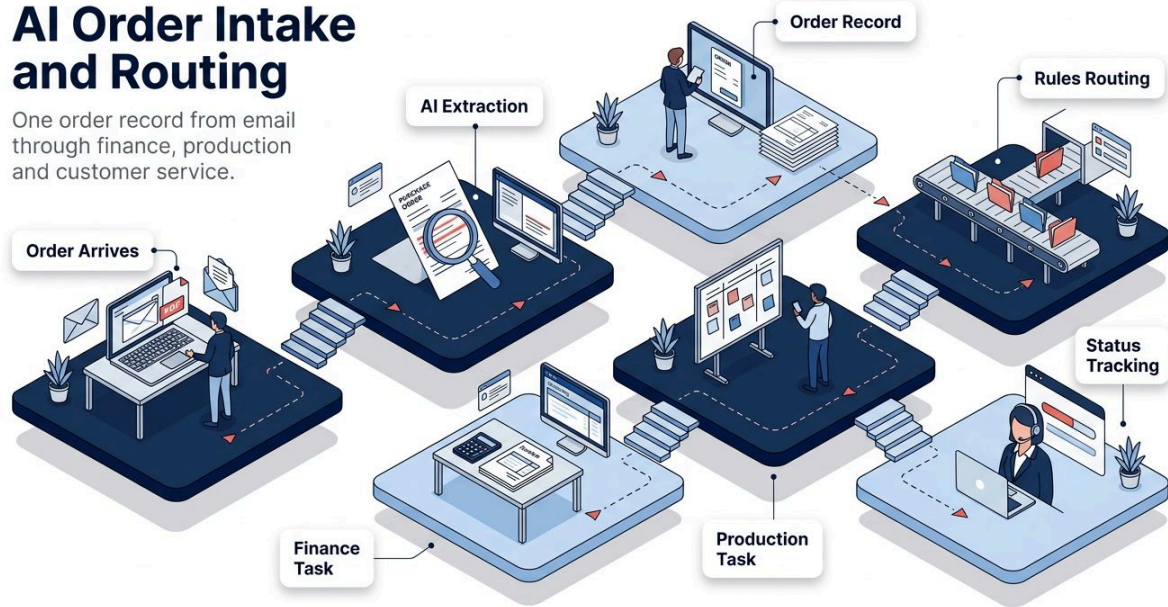
Solution Architecture

AI Order Intake and Routing System

DETAIL A – HOW THE SYSTEM WORKS

AI Order Intake and Routing

One order record from email through finance, production and customer service.

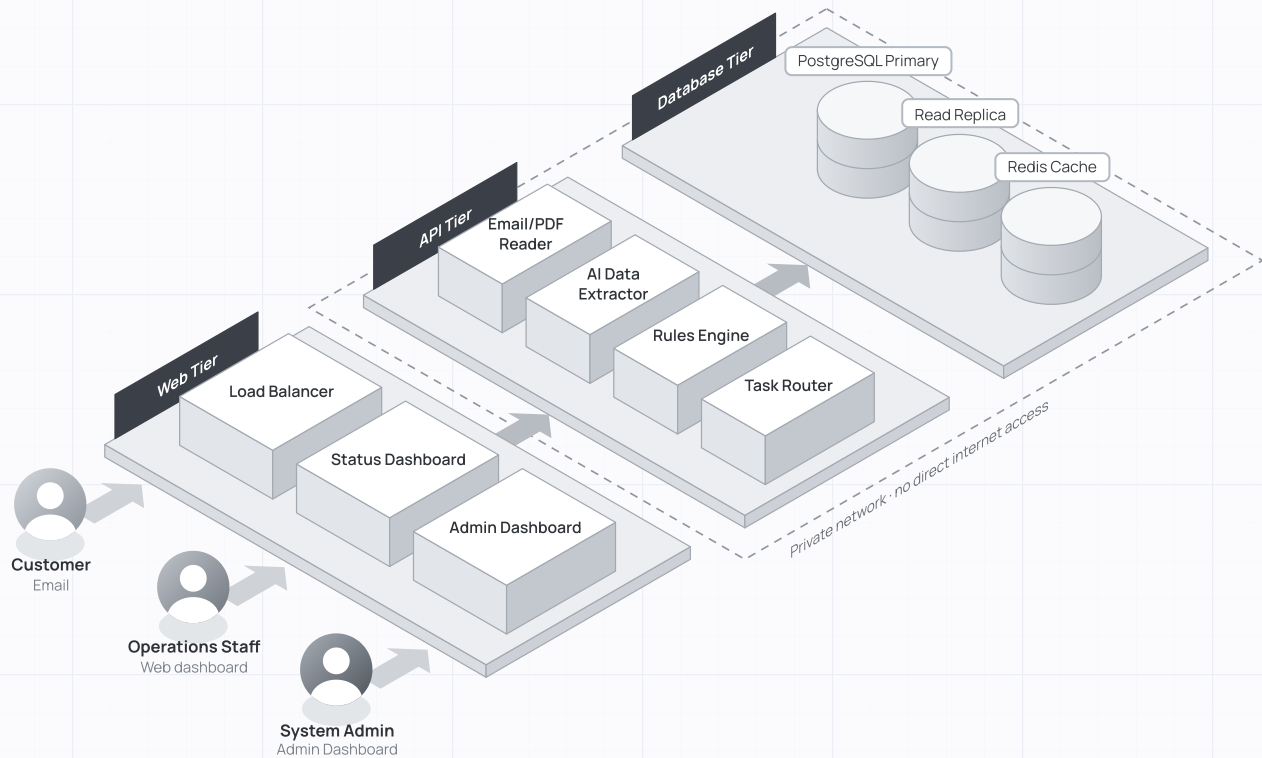


AI Order Intake and Routing – One order record from email through finance, production and customer service.



Deployment Architecture

A true 3-tier deployment — web, API and database on separate tiers, with the database in a private network, never exposed to the internet.



Who uses the system



Customer

Email

Sends PDF purchase orders



Operations Staff

Web dashboard

Review routed tasks and update order status



System Admin

Admin Dashboard

Monitors rules and system health

Traffic estimate

Daily volume

~27 orders/day

Peak load

**~0.05 req/s,
business-hours peak**

Concurrent users

~20 users

Capacity plan

2 app servers behind load balancer, auto-scaling to 4; PostgreSQL primary + replica, Redis cache

600 orders/month ÷ 22 working days ≈ 27/day; 30% peak-hour × 20 API calls/order ≈ 0.05 req/s; 2 app servers sustain >3×.

Server and cloud hosting costs are not included in this proposal; they are billed by the provider directly to you.



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Scope of Work

BILL OF MATERIALS

NO.	KEY COMPONENTS	ROLE
1	Email and PDF Reader	Watches the order inbox and picks up every incoming message and attached purchase order.
2	AI Data Extractor	Pulls customer, item, quantity and delivery details out of each PDF into structured fields.
3	Order Record	Holds one shared record per order with the extracted data and its current status.
4	Rules Engine	Applies your business rules to decide which team gets which task and in what order.
5	Task Router	Creates and sends the tasks to finance and production, with LINE notifications.
6	Status Dashboard	Gives customer service and management a live view of every order in progress.

INCLUDED

- ☒ AI extraction from email and PDF purchase orders
- ☒ Single shared order record with status tracking
- ☒ Business-rule routing engine
- ☒ Automatic task creation for finance and production
- ☒ LINE notifications and status dashboard
- ☒ Integration with sales Excel and Express accounting

NOT INCLUDED IN THIS SCOPE

- ☐ Redesign of the production whiteboard process itself
- ☐ Migration of historical order archives
- ☐ Custom mobile app development
- ☐ Server and cloud hosting costs

RISKS & MITIGATION

PDF purchase order formats vary across suppliers, which can reduce extraction accuracy.	Start with the highest-volume formats and add a validation queue for exceptions.
Express accounting may not expose a ready API for integration.	Confirm access in discovery and use a structured export/import fallback if needed.
Delayed feedback or UAT availability can push go-live.	Schedule UAT windows early and assign named owners for each team.



Delivery Plan



Estimated Investment

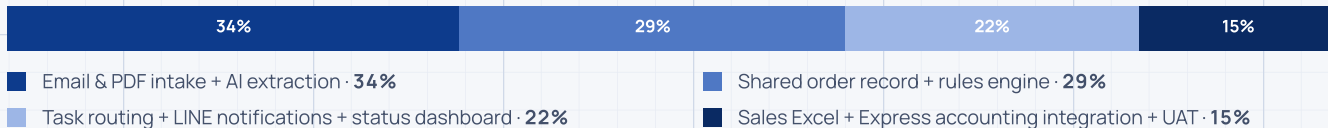
ESTIMATED TOTAL

฿90,000–250,000

Overall timeline

5 weeks

BUDGET BREAKDOWN



ITEM	PRICE RANGE (THB)	DURATION
Email & PDF intake + AI extraction Reads incoming email and PDF purchase orders and extracts order data once.	฿30,000–85,000	2 weeks
Shared order record + rules engine Creates the single shared order record and applies business rules for routing.	฿25,000–75,000	2 weeks
Task routing + LINE notifications + status dashboard Creates finance and production tasks, sends LINE alerts, and shows live status.	฿20,000–55,000	2 weeks
Sales Excel + Express accounting integration + UAT Connects sales Excel and Express accounting, then supports UAT and go-live.	฿15,000–35,000	1–2 weeks
Estimated total	฿90,000–250,000	5 weeks

PAYMENT TERMS



ESTIMATE ASSUMPTIONS

- Client provides sample emails, PDF purchase orders, sales Excel files, and Express accounting access or exports.
- Client confirms order fields, routing rules, and approval thresholds during discovery.
- Client team is available for weekly reviews and UAT within the 5-week timeline.
- Monthly volume is around 600 orders; no custom ERP replacement or hardware is included.

NOTE Every figure in this document is a preliminary estimate based solely on the information shared in conversation. Final pricing and timing are confirmed after a detailed requirements and systems review. Server and cloud hosting costs are not included in this proposal; they are billed by the provider directly to you.



Why DNA Maker

Thailand's leading banks, enterprises and government agencies trust us with systems that have to go live — and stay live.

500+
projects delivered since 2012

01 Chosen by Thailand's leaders

SCB, KBank, Krungsri, AIS, SCG, BDMS, the Treasury Department (Ministry of Finance) and Sony Device Thailand chose DNA Maker for systems where failure is not an option.

02 Bank-grade security, proven

A true 3-tier architecture (Web · API · Database) keeps your database off the public internet, validated by penetration and stress testing. Our Bluweo Engine is security-certified and runs at multiple bank groups.

03 You own 100% of it

Full source code and IP are handed to you — no plugin lock-in, no surprise licence fees, no limits on future changes.

04 Clears every go-live gate

We know bank and enterprise IT governance from the inside: every requirement in your TOR is covered, with no gaps and no surprises at acceptance.

05 Ready for the AI era

Content, search and data are structured for AI search engines and ChatGPT-style assistants, so the system grows with you instead of being rebuilt.

06 A partner long after launch

Multi-year client relationships, and a Bangkok team that stays on to improve the system and solve problems after go-live.

TRUSTED BY

SCB

Banking

KBank

Banking

Krungsri

Banking

AIS

Telecom

SCG

Industry

BDMS

Healthcare

Treasury Department

Ministry of Finance

Sony Device Thailand

Electronics

NEXT STEPS

- 1 Schedule a scoping session with the engineering team to confirm requirements, fields, and integration access.
- 2 Review and approve the proposed phases, quote, and payment milestones.
- 3 Sign the contract and start discovery; the 40% signing payment is due on contract signing.



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