



HaiBOT

Sales Knowledge Agent

Module Marketplace Blueprint (MMB)



Table of Contents

1. Module Overview.....	1
2. Module Purpose & Benefits.....	1
3. Module Components.....	2
4. Setup Requirements.....	3
5. System Compatibility	4



1. Module Overview

The Sales Knowledge Agent gives your sales team instant answers, right inside Microsoft Teams. Account Managers and Executives simply ask a question in plain language and get accurate, role-appropriate responses without switching systems or chasing colleagues.

The agent is powered by a continuously updated knowledge base that combines two rich data sources. From Bitrix24, the agent captures live deal data, including deal status, values, stages, and history, enabling your team to query pipeline activity, track deal progress, and surface key metrics on demand. From SharePoint, administrators can upload and maintain supporting resources such as product and service offerings, pricing structures, SLA terms, company information, and FAQs, giving the agent the depth to handle queries that go beyond deal data. Together, these sources deliver a single, consolidated knowledge base, always current, always available.

Where the Sales Dashboard module is active, built-in role-based access ensures Account Managers see only their own targets, while Executives get full visibility, all applied automatically, no manual setup required.

2. Module Purpose & Benefits

This module eliminates the time your sales team spends hunting for information. Instead of digging through multiple systems, documents, or chasing colleagues, Account Managers and Executives simply ask a question in Microsoft Teams and get the answer they need — instantly, accurately, and tailored to their role.

Key benefits:

- Instant answers, zero friction: Ask a question in Teams, get an immediate response — no portals, no searching, no waiting.
- Always current: The knowledge base updates automatically from Bitrix24 deal data, so your team is never working with outdated information.
- Comprehensive coverage: Administrators can upload additional resources like pricing, SLAs, and product details, giving the agent the depth to handle virtually any sales query.
- More time selling: With information consolidated in one place, your team spends less time searching and more time closing deals.



- Consistent and governed: Every response is drawn from a single, centralised knowledge base with role-based access controls — so everyone gets the right information, every time.

3. Module Components

The Sales Knowledge Agent automates information retrieval and query resolution by capturing user input through Microsoft Teams, interpreting natural language queries, and delivering contextually relevant responses from a centralised knowledge base. The module ensures reliability and consistency through built-in logging, exception handling, and role-based access controls.

Table 1: Main capabilities of the module.

No.	Component	Description
1	User Access Validation	Validates the user's email address upon each interaction to confirm they are an authorised user of the Sales Knowledge Agent.
2	Natural Language Querying	Enables users to ask questions in plain language through Microsoft Teams and receive clear, accurate responses.
3	Data Access Validation	Determines the user's assigned role (Account Manager or Executive) and applies the appropriate data access permissions, ensuring Account Managers can only access their own targets while Executives have full visibility across all Account Manager targets. Note: Only applicable where the organisation is subscribed to the Sales Dashboard module.
4	Contextual Response Generation	Delivers contextually relevant and reliable responses by referencing both Bitrix24 deal data and administrator-uploaded content in SharePoint.



No.	Component	Description
5	Knowledge Base Integration	Consolidates deal data from Bitrix24 and administrator-uploaded resources from SharePoint into a central knowledge base for comprehensive query resolution.
6	Administrator Content Management	Allows administrators to enrich the knowledge base by uploading external resources to the designated SharePoint document library.
7	Transaction Logging	Records all actions and system events to support auditing, traceability, and compliance requirements.
8	Exception Handling	Integrates with Freshservice to detect, track, and manage errors or anomalies, ensuring smooth processing and quick resolution of issues.

4. Setup Requirements

The module requires a set of key prerequisites to ensure proper functionality and seamless integration within the environment. These setup requirements include essential system configurations, necessary permissions, and any dependent services or components that must be in place before deployment.

Table 2: Setup requirements of the module.

No.	Requirement	Description
1	Communication Application	A configured and active communication application is required to enable user messaging and support the conversational interaction with the Sales Knowledge Agent.
2	Aligned CRM Datapoints	The CRM system must have the necessary data fields configured and aligned to receive deal information,



No.	Requirement	Description
		ensuring the knowledge base captures deal data accurately and consistently.
3	Provisioned Document Repository	A designated document repository must be provisioned and accessible for administrators to upload and manage supporting resources used by the knowledge base.

5. System Compatibility

The systems listed in Table 3 are supported and have been fully integrated with the module.

Table 3: System compatibility.

No.	System Category	System Name/(s)
1	Communication Platform	Microsoft Teams
2	CRM System	Bitrix24
3	Document Repository	Microsoft SharePoint

6. Module Compatibility

Certain modules can be used alongside the Sales Knowledge Agent to unlock additional capabilities. Table 4 outlines compatible modules and the functionality they enable when active.

Table 4: Module compatibility.

No.	Module	Functionality
1	Sales Dashboard	Enables role-based access control and target querying, allowing the agent to validate user roles (Account Manager or Executive) and apply data access permissions scoped to individual targets. Without this module, users cannot query targets through the agent.

