

Queue

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RFQ Broadcast AI Agent Complete

Vertexa RFQ 2025

REQUEST FOR QUOTATION

ANNUAL MAINTENANCE CONTRACT (AMC) FOR HPLC SYSTEMS

RFQ Reference: AMC-2025-VTX-001

Issue Date: May 14, 2025

Proposal Due Date: June 21, 2025

Document Version: 1.2

Classification: CONFIDENTIAL

1. DOCUMENT PURPOSE

This RFQ invites qualified vendors to submit quotations for an Annual Maintenance Contract (AMC) covering High-Performance Liquid Chromatography (HPLC) systems at Vertexa Scientific's main facility in Cedar Grove, Wisconsin. The goal is to secure reliable technical maintenance aligned with regulatory and operational standards.

2. BACKGROUND & CONTEXT

Vertexa Scientific is a U.S.-based manufacturer of analytical reagents and fine chemicals serving pharmaceutical, diagnostics, and food industries. Our Quality Control and Research (QC&R) lab operates in accordance with ISO 17025 and FDA regulations. Timely maintenance of HPLC systems is essential for lab performance and compliance.

3. EQUIPMENT DETAILS

Systems Covered:

- 5 x Agilent 1260 Infinity II HPLC Systems
- Includes: Quaternary Pump, Autosampler, Column Compartment, Diode Array Detector
- Integrated with OpenLab CDS
- Location: QC&R Laboratory, Cedar Grove, WI

Equipment Inventory:

Asset ID	Model	Serial Number	Installation Date	Warranty Status
HPLC-W0-01	Agilent 1260 Infinity II	VX2603421	June 13, 2023	Expired
HPLC-W0-02	Agilent 1260 Infinity II	VX2603422	June 13, 2023	Expired
HPLC-W0-03	Agilent 1260 Infinity II	VX2603674	August 21, 2022	Expired
HPLC-W0-04	Agilent 1260 Infinity II	VX2607965	January 05, 2023	Expired
HPLC-W0-05	Agilent 1260 Infinity II	VX2608732	February 08, 2023	Expired

4. MAINTENANCE SERVICE REQUIREMENTS

4.1 Preventive Maintenance (PM):

- Frequency: Twice annually per unit
- Tasks: Degassing, calibration, system cleaning, PQ, minor part replacement
- Reporting: Electronic format with calibration data
- Timing: Scheduled to avoid production downtime

4.2 Corrective Maintenance (CM):

- Onsite Response: Within 1-2 business days
- Issue Resolution: Within 7 business days
- Remote Triaging: Response within 4 hours
- Coverage: Labor included, parts as per agreement
- Escalation Protocol: Clearly defined escalation ladder

Output

AMC for HPLC Systems

Vertexa Scientific Inc.
Contract Start: August 1, 2025
Contact: alex.morgan@vertexascientific.com

Pre-Bid Conference
June 9, 2025 (Virtual)

Vendor Selection

VENDOR NAME	REGION	AGILENT CERTIFIED	DOMAIN EXPERTISE	PAST AMC PERFORMANCE	SELECTED
PrecisionLab Services	Midwest (W)	✓	Analytical Instrumentation	Excellent	✓
ChromaTech Solutions	Illinois	✓	Analytical Instrumentation	Good	✓
Apex Instrument Care	Minnesota	✓	Analytical Instrumentation	Excellent	✓

Email Draft to PrecisionLab Services

To: PrecisionLab Services (rfqs@precisionlabservices.com)

Subject: Request for Quotation – HPLC AMC at Vertexa Scientific (RFQ Ref: AMC-2025-VTX-001)

Dear PrecisionLab Services Team,

We are pleased to invite your organization to submit a quotation for our Annual Maintenance Contract (AMC) covering Agilent 1260 Infinity II HPLC systems at our Cedar Grove, Wisconsin facility.

As a trusted provider with a strong track record in analytical instrument maintenance and an Agilent-certified service team in the Midwest, your firm has been identified as a strong fit for this opportunity.

Key Details:

Agent Activity

Catch Webhook

Trigger Inputs

Router

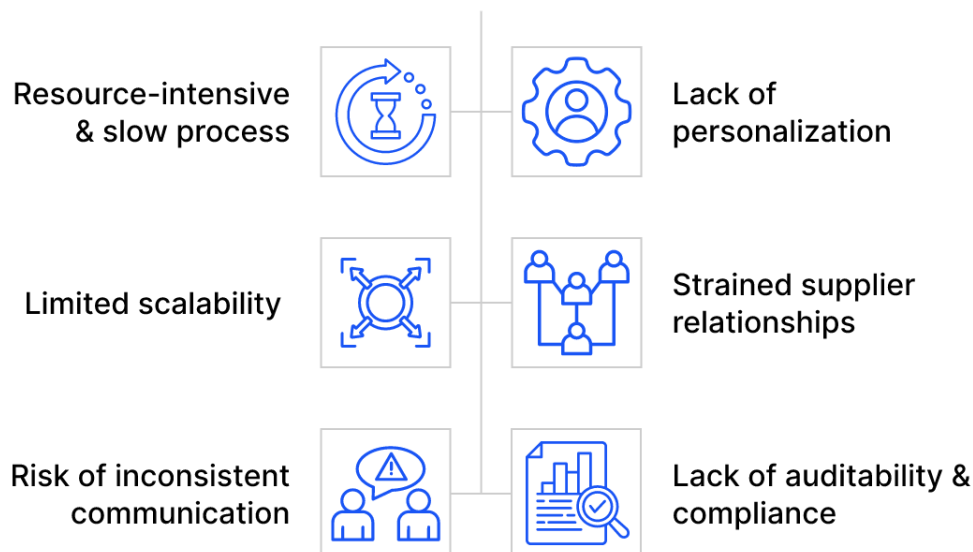
RFQ Broadcast Agent Solution Document

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| Problem Statement

Organizations managing procurement at scale face significant challenges in distributing Request for Quotation (RFQ) invitations to a wide and diverse vendor base. The manual process involves extracting essential details from RFQ documents, tailoring communication for each RFQ type, and ensuring that critical information, such as reference IDs, requirements, deadlines, and contact points, is consistently included. These steps are slow and resource-intensive, often resulting in inconsistencies or omissions that lead to delayed broadcasts, missed notifications, and a lack of personalization in vendor outreach. Errors in subject lines or message content can lead to confusion and reduce vendor engagement, particularly when handling high volumes of RFQs or when formats frequently change. Manual workflows lack audit trails and standardization, making it difficult to track which vendors were notified, maintain compliance, or enforce best practices across teams. As procurement cycles accelerate and expectations for timely, accurate communication grow, these gaps can result in missed opportunities, compliance risks, and strained supplier relationships. To address these issues, organizations need an automated solution that ensures consistent, efficient, and reliable RFQ invitation distribution at scale.

Challenges Associated with Traditional RFQ Broadcasting

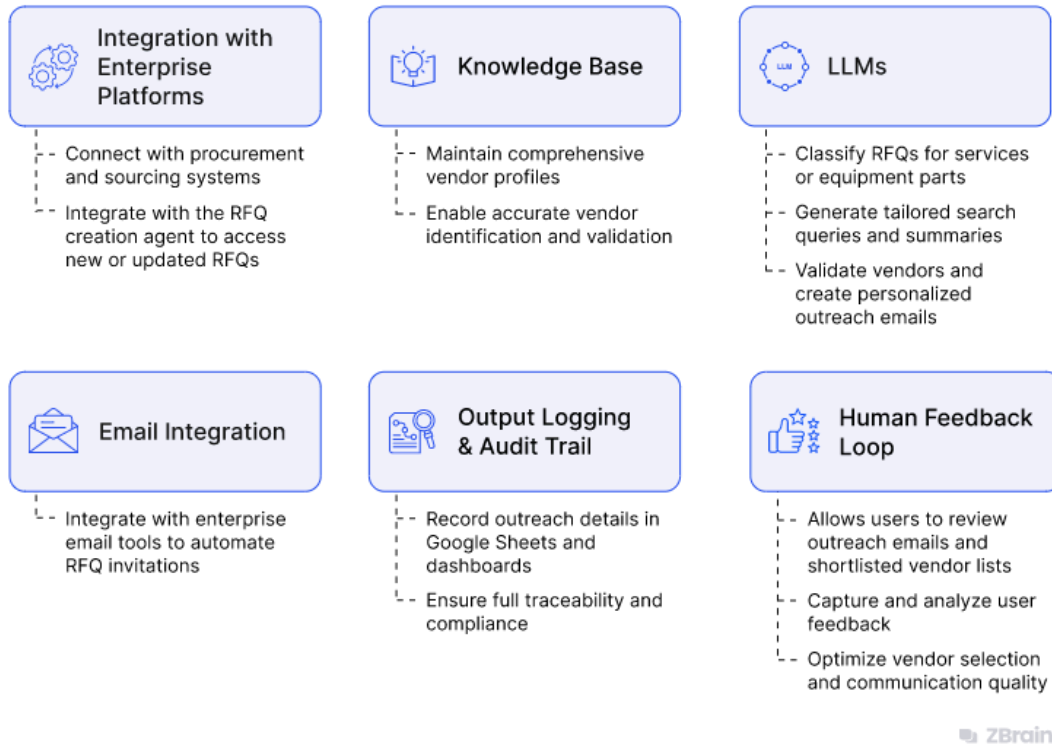


| **Solution Statement**

ZBrain RFQ broadcast agent automates the entire RFQ invitation process by analyzing structured RFQ documents, classifying requirements as services or equipment parts, and selecting the appropriate vendor list. Leveraging Large Language Models (LLMs), the agent generates tailored queries and concise summaries from each RFQ, extracts vendor data from organizational knowledge bases, and validates vendor eligibility and compliance against mandatory criteria. For every RFQ, it creates and dispatches context-specific, personalized emails to each validated vendor, ensuring that all communications are both standardized and targeted. Distribution activity, including email content and vendor information, is automatically logged, creating a transparent and auditable record of every RFQ broadcast. The agent integrates with enterprise tools, eliminates manual drafting and distribution, and enables rapid, accurate, and trackable RFQ broadcasts at scale. This approach reduces operational delays, minimizes errors, and enables procurement teams to efficiently reach the right vendors while maintaining compliance and audit readiness.

Agent Setup

ZBrain RFQ broadcast agent is equipped with the following components to automate the process of generating and distributing RFQ invites across the vendor pool.



1. Integration with Enterprise Systems

This agent seamlessly integrates with various enterprise platforms, including procurement systems and sourcing platforms, enabling seamless communication across RFQ workflows. It also connects with the RFQ creation agent to access new or updated RFQs as they become available.

2. Email Integration

Integrates with enterprise email platforms (such as Gmail) to automate the broadcasting of RFQ invitations at scale.

| Agent Setup

3. Knowledge Base

The agent uses a vendor knowledge base that contains comprehensive profiles for each vendor, including company information, contact details, region coverage, services offered, equipment supported, certifications, and years of experience. This enables accurate and efficient vendor identification and validation based on RFQ-specific criteria.

4. LLMs

The agent uses LLMs to perform RFQ classification (services vs. equipment parts), generate tailored queries and high-level summaries, validate relevant vendors, and create personalized email content and outreach summaries.

5. Output Logging & Audit Trail

Automatically records all outreach activities, including vendor identifiers, names, email subjects, and email bodies in Google Sheets and the agent dashboard for full traceability and compliance.

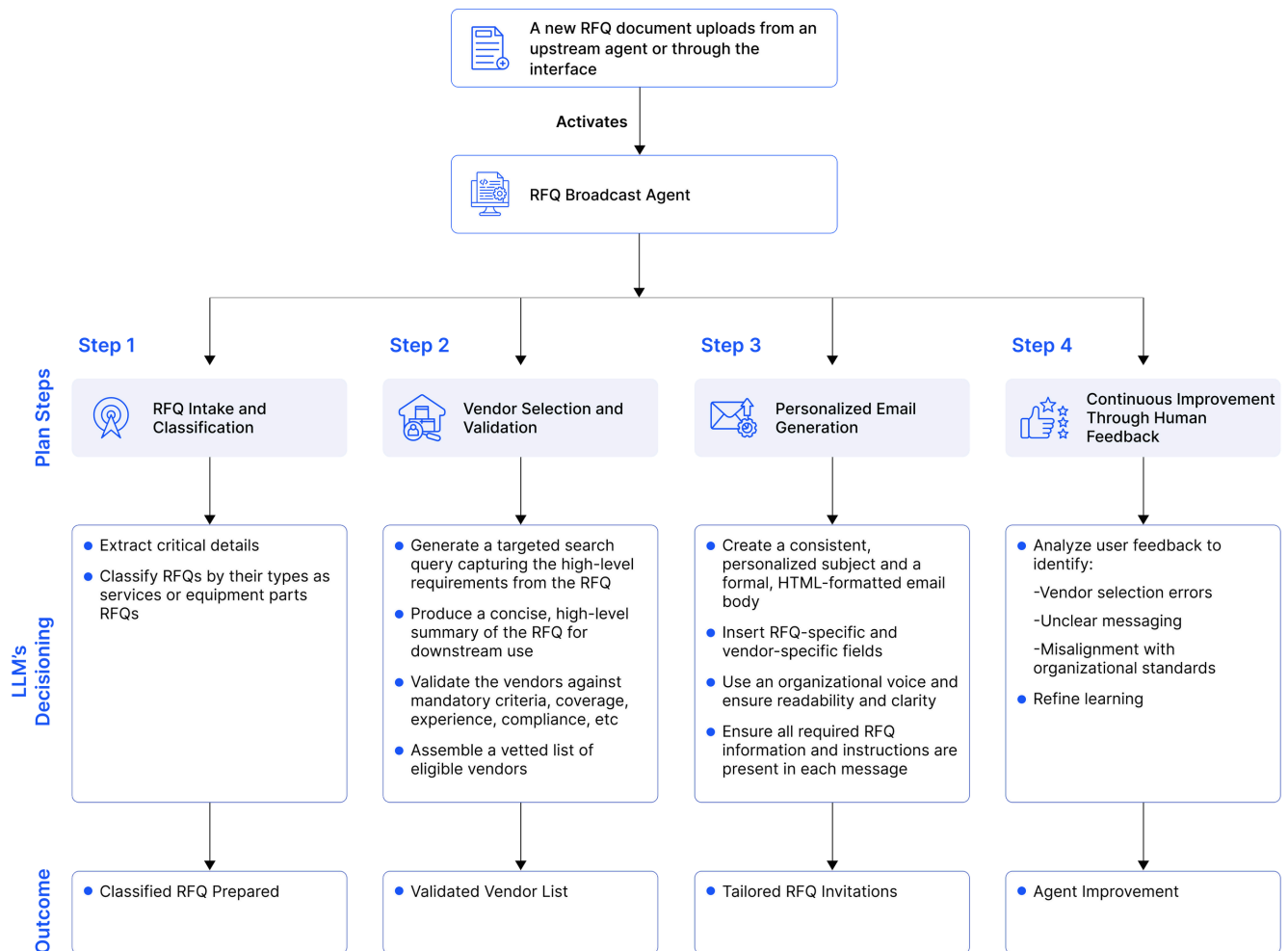
6. Human Feedback Loop

Captures user feedback on the relevance of vendor selection, communication accuracy, and adherence to organizational guidelines. By systematically analyzing this feedback, the agent identifies recurring issues and opportunities for process improvement, enabling ongoing optimization of both vendor outreach accuracy and communication quality.

This structured setup enables the RFQ broadcast agent to automate and personalize the RFQ invitation process, driving faster, more accurate, and fully traceable vendor engagement across procurement cycles.

How the Agent Works

ZBrain RFQ broadcast agent is designed to automate the entire process of distributing RFQ invitations to relevant vendors. Leveraging LLM capabilities, the agent analyzes each RFQ document, classifies the requirements, validates eligible vendors, and generates personalized communications tailored to each vendor. Below, we outline the detailed steps that define the agent's workflow:



| How the Agent Works

Step 1: RFQ Intake and Classification

The workflow begins when the agent receives a new RFQ document and prepares it for downstream processing.

Key Tasks:

- **Document Ingestion:** Accepts structured or semi-structured RFQ files (PDF, DOCX, etc.) from the RFQ creation agent or directly through the agent interface.
- **Data Extraction:** Extracts critical details, including RFQ ID, requirements, submission deadlines, and contact information.
- **RFQ Type Classification:** Utilizes an LLM to determine if the RFQ pertains to services or equipment parts. This classification guides the selection of the appropriate processing path based on RFQ type.

Outcome:

- **Classified RFQ Prepared:** The RFQ is accurately classified by type, and all essential details are extracted and structured for further processing in downstream steps.

Step 2: Vendor Selection and Validation

The agent dynamically identifies, filters, and validates vendors to ensure only qualified suppliers are targeted.

Key Tasks:

- **Vendor Search Query Generation:** Leverages an LLM to generate a targeted search query capturing the high-level vendor requirements from the RFQ. This structured query guides the downstream vendor filtering process.
- **RFQ Summary Preparation:** Uses an LLM to produce a concise, high-level summary of the RFQ for downstream use. The summary mainly includes the RFQ's purpose, scope, submission deadlines, reference number, critical compliance requirements, and the most relevant contact point.
- **Knowledge Base Search:** Performs a hybrid search in the vendor knowledge base using the generated search query to accurately identify potential vendor matches based on RFQ requirements.
- **Vendor Validation:** Upon identifying potential matches, the agent utilizes an LLM to comprehensively validate the vendors against mandatory criteria, regional coverage, experience, compliance, and certifications. This validation step also excludes vendors that lack the required details or have incomplete profiles.
- **Final Vendor List Compilation:** Assembles a vetted list of eligible vendors for distribution of the RFQ. The list includes structured details such as vendor ID, name, contact person, contact email, location, region coverage, services offered, equipment supported, certifications, and years of experience.

Outcome

- **Validated Vendor List:** A compliant, relevant, and ready-to-engage vendor list is generated for efficient RFQ broadcast.

| How the Agent Works

Step 3: Personalized Email Generation

The agent generates and customizes RFQ invitations for each validated vendor, ensuring every communication is relevant, context-aware, and ready for review or dispatch.

Key Tasks:

- **Subject & Content Generation:** Creates a consistent, personalized email subject and a formal, HTML-formatted email body for each vendor, incorporating the RFQ title, reference number, submission deadline, location, and all requirements.
- **Contextual Personalization:** Automatically inserts RFQ-specific details (such as requirements, deadlines, and contact points) and vendor-specific fields (name, location, contact person) to ensure clarity and a personalized experience. Uses an organizational voice and applies formatting for readability and clarity.
- **Drafting Mode:** Offers the option to generate email drafts for human review before sending, reducing the risk of miscommunication.
- **Content Validation:** Ensures all required RFQ information and instructions are present in each message.

Outcome

- **Tailored RFQ Invitations:** Vendors receive clear, customized invitations that drive higher engagement and timely responses.

Step 4: Audit Logging and Reporting

The agent logs each RFQ broadcast in a structured reporting system, such as Google Sheets, providing a clear and auditable record of all vendor communications.

Key Tasks:

- **Tabular Output Generation:** The agent dashboard displays matched vendor details in a concise table, including Vendor ID, Vendor Name, Email Subject, and Email Body, with a direct link to the corresponding report for review.
- **Flexible Output Logging:** All RFQ distribution details and vendor communications are systematically recorded in a Google sheet for transparency and auditability. The agent supports logging each new RFQ in a separate Google sheet or a dedicated tab, ensuring organized and easily retrievable records.

Outcome

- **Transparent Audit Trail:** A structured, readable table is displayed on the dashboard, and all RFQ broadcast details are accurately recorded in Google Sheets, supporting compliance, transparency, and streamlined reporting.

| How the Agent Works

Step 5: Continuous Improvement Through Human Feedback

The agent incorporates user feedback to refine vendor validation and enhance the quality of RFQ communications.

Key Tasks:

- **Feedback Collection:** Enables users to review vendor lists and outreach emails for relevance, accuracy, tone, and completeness, helping flag vendor selection errors or unclear messaging.
- **Feedback Analysis and Learning:** The agent processes this feedback to identify recurring issues, such as gaps in vendor selection, inconsistent communication, or misalignment with organizational standards.

Outcome:

- **Agent Improvement:** The agent continually evolves by incorporating user feedback, ensuring that outreach and vendor selection remain accurate, effective, and aligned with business requirements over time.

| Key Benefits



Accelerated RFQ Distribution

Automates the preparation and broadcasting of RFQ invitations, significantly reducing turnaround time compared to manual processes.



Targeted Vendor Communication

Selects and validates relevant vendors for each RFQ type, ensuring invitations reach only qualified recipients.



Personalized and Consistent Messaging

Generates context-specific and personalized emails, maintaining a professional and standardized approach across all vendor communications.



Reduced Manual Workload

Eliminates the need for procurement teams to draft, personalize, and track individual RFQ emails, freeing resources for higher-value tasks.



Scalable Operations

Handles large volumes of RFQs and vendor lists without delays, supporting the demands of growing procurement teams.



Enhanced Response Rates

Ensures that invitations are timely, relevant, and clear, increasing the likelihood of vendor participation and response quality.

| Conclusion

ZBrain RFQ broadcast agent transforms manual, error-prone RFQ invitation distribution into an automated, scalable workflow that accelerates vendor outreach and ensures messaging consistency. Leveraging LLM-driven RFQ requirement analysis, vendor validation, and dynamic email content generation, the agent removes communication bottlenecks and significantly reduces procurement workload. Teams benefit from improved engagement rates, reduced overhead, and greater consistency in outreach. With capabilities for personalized messaging, rapid distribution, and ongoing optimization, the agent enables organizations to engage with vendors more efficiently and maintain high procurement standards. Its robust auditability and adaptability ensure scalable, compliant, and future-ready procurement operations.