

Offer Data

- Product/service name:
- Buyer:
- Problem solved:
- Outcome:
- Setup fee:
- Monthly fee:
- Payment-plan options:
- Refund/cancellation terms:
- Support path:

Checkout and Quote Path

- Can the offer be purchased directly?
- Does it require a quote?
- Who approves custom scope?
- What fields are required before quoting?
- What payment methods are accepted?
- What happens if payment fails?

Agent-Specific Rules

- Can an agent recommend the offer?
- Can an agent request a quote?
- Can an agent place an order?
- Can an agent schedule a call?
- Can an agent open support?
- What must a human confirm?

Operational Readiness

- Receipts:
- Disputes:
- Refunds:
- Subscription changes:
- Support escalation:
- Sales handoff:
- Audit evidence:

DID Recommendation

If the offer requires custom scope, regulated review, or setup fee financing, start with agent-readable quote intake before enabling any checkout automation.