



Automation Agent Email on Error

Jacob Beimers - 2024-12-03 - Miscellaneous

Overview

Starting with version 5.2.30 of SalesPad, Automation Agent can send an email whenever an error occurs in an automation. This feature makes it easier to spot errors in the automation process and gives users a better chance to correct the errors while they're still merely a minor inconvenience.

SMTP Setup

In order to send email, the SalesPad user who is running Automation Agent must have a Simple Mail Transfer Protocol (SMTP) configuration setup within SalesPad. There are two ways to configure this.

The first way is via the SMTP Setup screen. When Automation Agent sends an error, it first looks for a SMTP row with the following data:

- Business Object = SystemUser
- Column Name = User_Name
- Column Value = (the SalesPad user who is running Automation Agent)

If there is a matching row, Automation Agent will use that SMTP information. If Automation Agent is running via the Automation Agent Service, the Column Value field must match the Automation Agent User Name setting's value. Otherwise, the Column Value must match the currently logged in SalesPad user.

Email Server hostname or IP address.	SMTP Port	Business Object	Column Name	Column Value
smtp.gmail.com	587	SystemUser	User_Name	Automation Agent

For more information on how to use the SMTP Setup screen, please refer to [this documentation](#).

If the SalesPad user doesn't have a matching row on the SMTP Setup screen, Automation Agent will try to use the Sales Email Confirmation settings instead. Unlike configurations on the SMTP Setup screen, any SalesPad user can use this SMTP information.

Sales Email Confirmation	
1) Email Server hostname or IP address.	smtp.gmail.com
2) SMTP User	jonathon.minard@cavallo.com
3a) SMTP Password --or--	*****
3b) SMTP OAuth Service Provider	
4) SMTP Port	587
5) Enable SMTP over SSL or TLS	True
6) SMTP over SSL or TLS Startup Method	Auto

Settings

Once SMTP is configured, users can configure automations to send emails when errors occur. This configuration is per automation and is done on the automation's Settings tab.

Send Email	
Send Email On Error	
Email Errors	True
Email Errors From	jonathon.minard@cavallo.com
Email Errors To	android@salespadsolutions.com
Error Email Outgoing Name	Automation Agent

Email Errors - If set to 'True' and the 'Email Errors From' and 'Email Errors To' settings are correctly filled out, Automation Agent will send an email for each error that reaches the Action Center. Defaults to 'False'.

Email Errors From - The email address which Automation Agent will use to send automation errors. The email address must be accessible by the SMTP Setup screen row which belongs to the system user who's running Automation Agent. If that system user doesn't have a SMTP Setup row, the email address must be accessible by the Sales Email Confirmation settings instead. Defaults to nothing.

Email Errors To - The email address which Automation Agent will send automation errors to. Defaults to nothing.

Error Email Outgoing Name - The outgoing name which Automation Agent will use when sending automation errors. If blank, the mail server will use a default value based on the sender's email address. Defaults to 'Automation Agent'.

Example

SalesPad's Shopify integration has an order import. Automation Agent can encounter an

eConnect error when it tries to import an order. If that integration has Email Errors set to 'True' and Email Errors From set to a properly configured email address, the email address specified in the Shopify integration's Email Errors To setting will receive an email like the following:

Shopify Order Import Component Error External Inbox x



Automation Agent

to jonathon.minard ▾

Error Type: Component Exception

External ID: 4452016881724

Error Message:

Import Error

ERROR: Inventory item ZZ-ANONYMOUS_ITEM does not exist

SUGGESTION: One of the items on the sales document does not exist in Dynamics GP. Contact your Dynamics GP administrator or support person to fix.