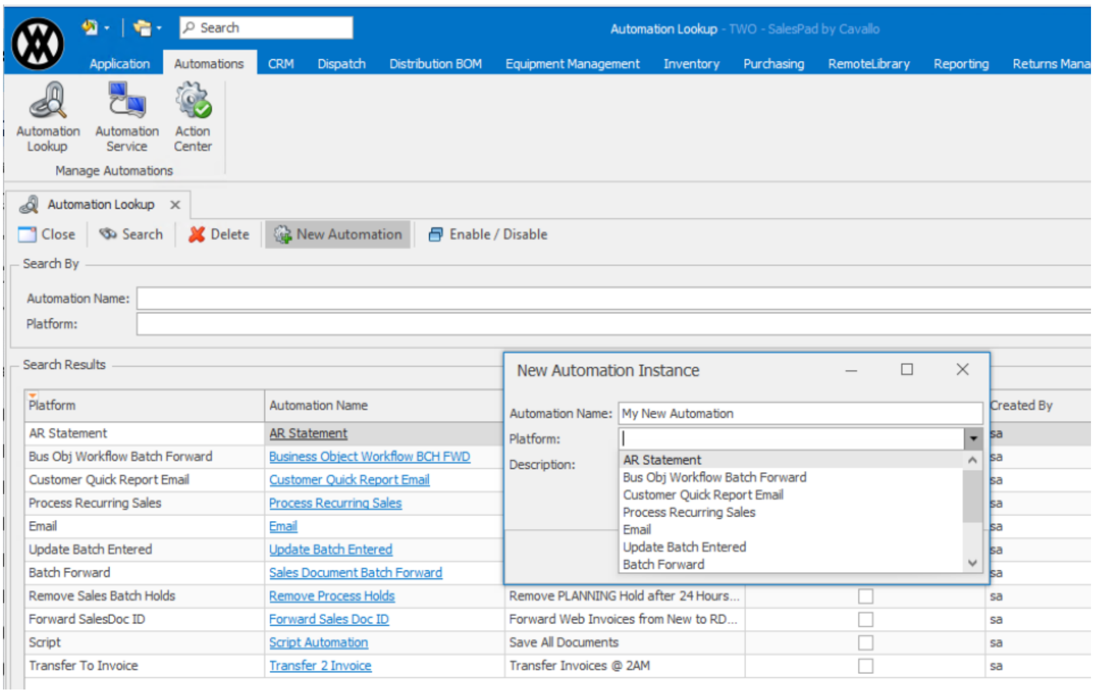
Automation Agent - Platform Fact Sheet

Professional Services - 2024-12-05 - Miscellaneous

Automations created in SalesPad Desktop's Automation Lookup must choose a **Platform** when creating and scheduling an automated process in Automation Agent.



This article contains a list of all currently-supported platform types, sample use cases and platform-specific features and benefits. It is not intended to be a comprehensive setup guide for all Platforms, as each Platform contains integration-specific settings covered in individual support articles, linked with each Platform Description.

Please note that some Platforms, such as our **Pacejet, Magento, Shopify, and WooCommerce platforms** require additional Licensing. *

*Contact your Cavallo Account Manager to discuss Platform requirements and licensing.

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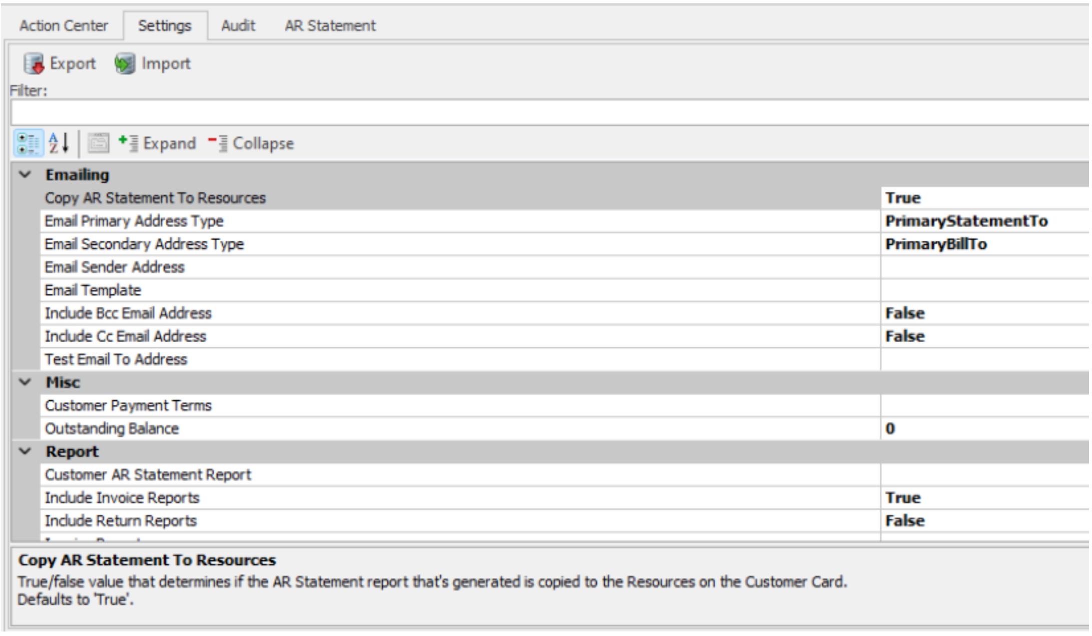
A/R Statement

Triggers an Accounts Receivable Statement to be emailed to a customer based on the Payment Terms of customer(s).

On a scheduled basis, an A/R Statement may be sent to the customer(s) via email. In the most recent version of SalesPad Desktop, 5.2.38 and higher, users can assign specific layouts for invoices & returns that need to be attached to the Customer A/R Statement, which email address to include (CC & BCC) as well as C# scripting that can create a custom list of customers to search/use for sending the A/R Statement to.



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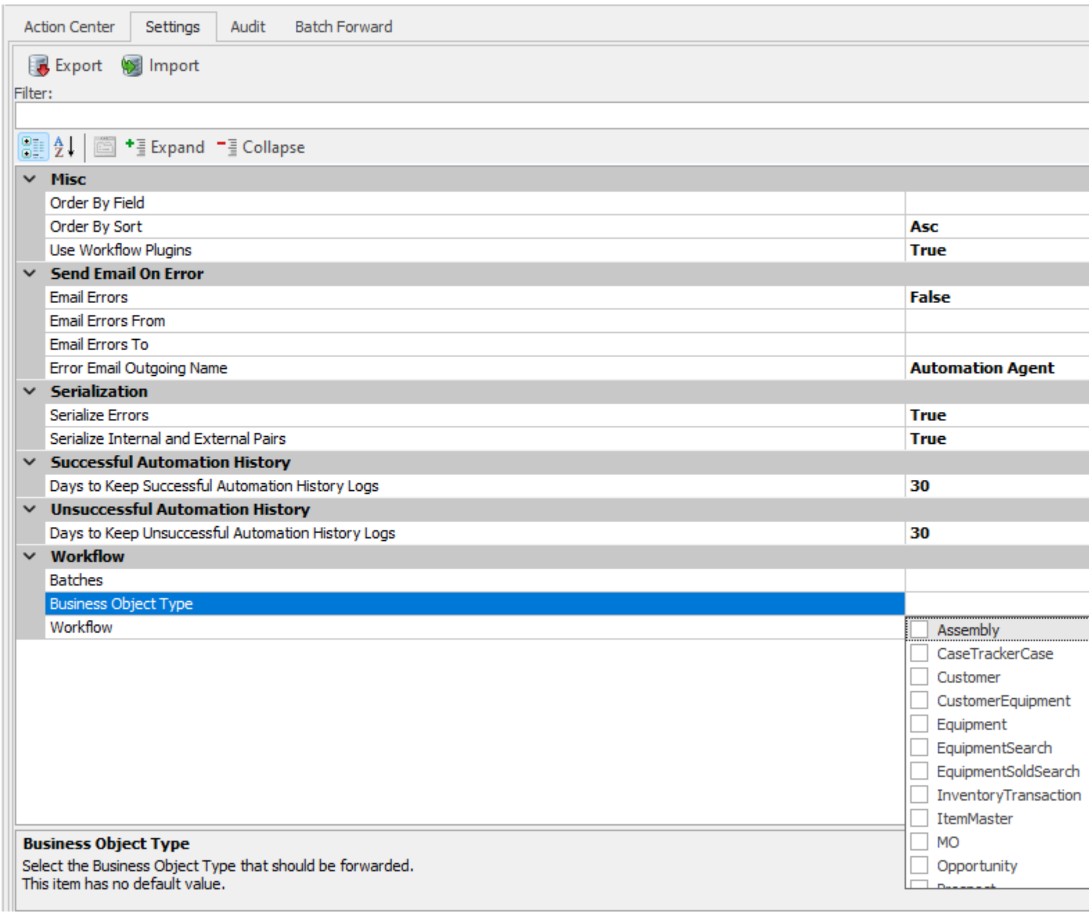
Business Object Workflow Batch Forward

Will trigger the release of documents from a batch rather than manually clicking a button to trigger the action to forward through workflow. This *excludes* Sales Documents as that can be triggered using the **Batch Forward** automation. This will apply to any Business Object Workflow specified in the automation settings.



This may be used to auto-forward Assemblies when certain conditions are met, or Case Tracker Cases at certain times during the day to ensure users are updating/closing cases.

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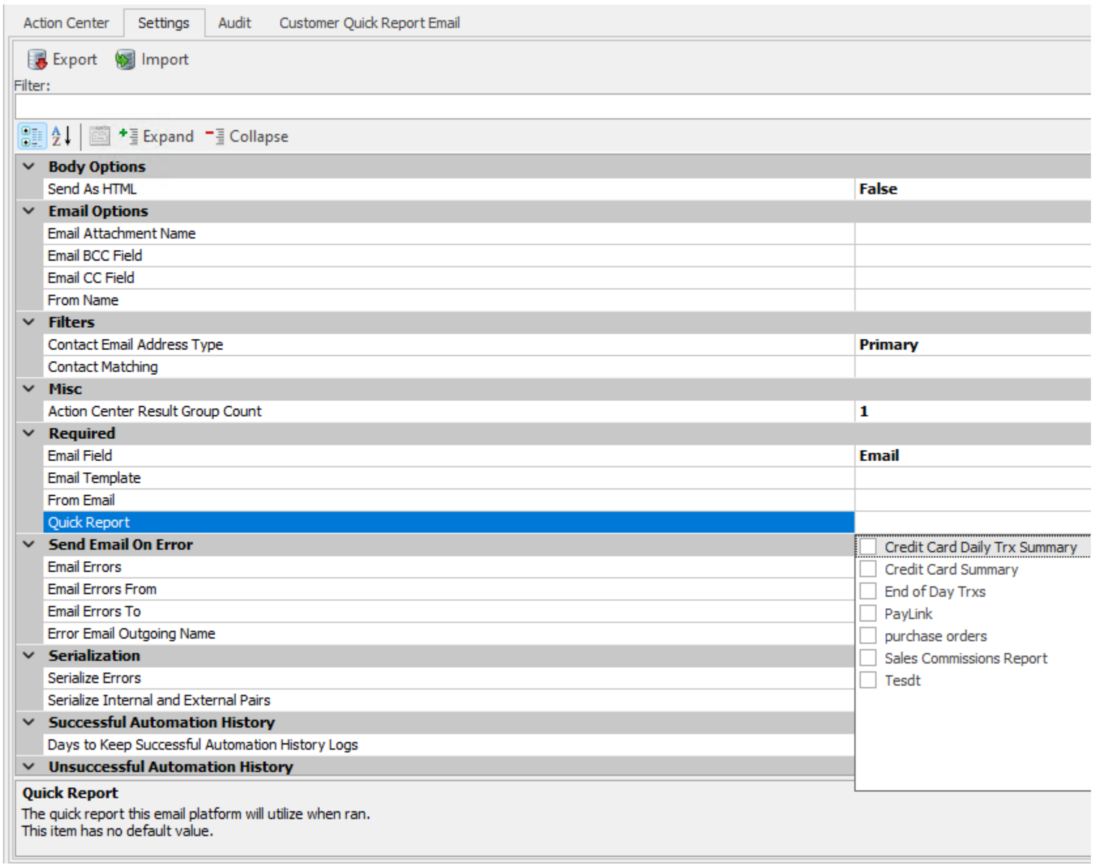
Customer Quick Report Email

Triggers a Quick Report to be emailed to a customer.

If some customers would like a report of their open documents and when they may expect to ship, and/or the status of the line items, or AR/Invoice details, a Quick Report created using the Quick Report Designer can be sent to the customer with such information on a recurring basis.



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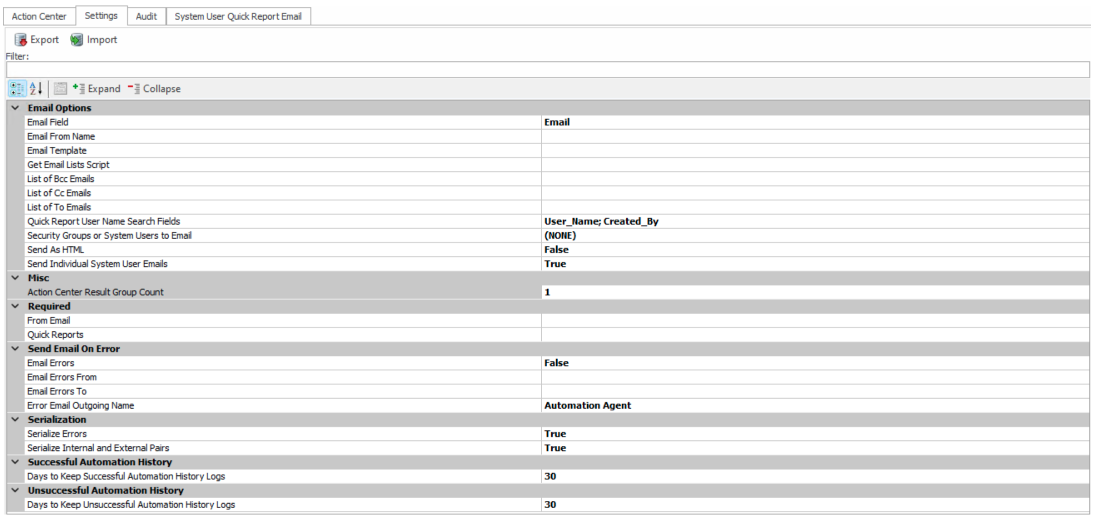
System User Quick Report Email

Triggers an email containing a pre-defined Quick Report to one or more SalesPad Desktop Users. Complete information can be found in the System User Quick Report Email support page.



In addition to System Users, a job-specific list of email addresses can be sourced from a System User Email Template, 'hard-coded' or dynamically-generated through the use of the *Get Email Lists* script.

Quick Reports designed to filter based on a User ID, such as by Created_By user, can be configured so that individual System Users will only receive Quick Report data relevant for their login.

Use cases include automating the email of

- Internal Daily / Weekly / Monthly Sales Reports
- Internal "Open Purchase Orders" List
- Internal "Backordered Products" List
- Internal "Expiring Quotes" List

to Sales Reps, CSRs, Purchasing Managers, and more.

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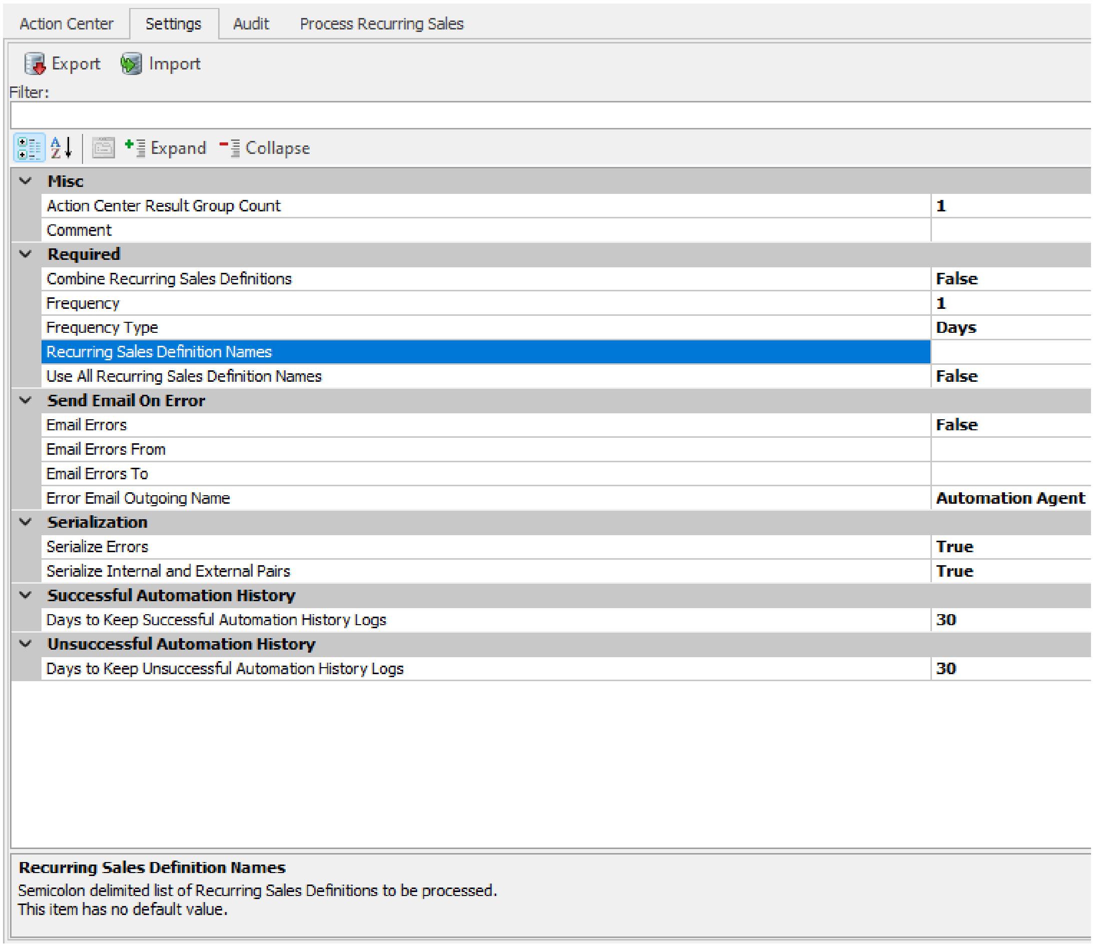
Process Recurring Sales

Triggers the scheduled generation of sales documents based on the setup in Recurring Sales.

If a list of documents has been built for recurring sales in the Recurring Sales Generator within SalesPad Desktop, this will trigger the generation of those documents on a scheduled basis without user interaction. Most customers would trigger this once daily so that documents that need to be created for recurring sales will be created on the day needed.



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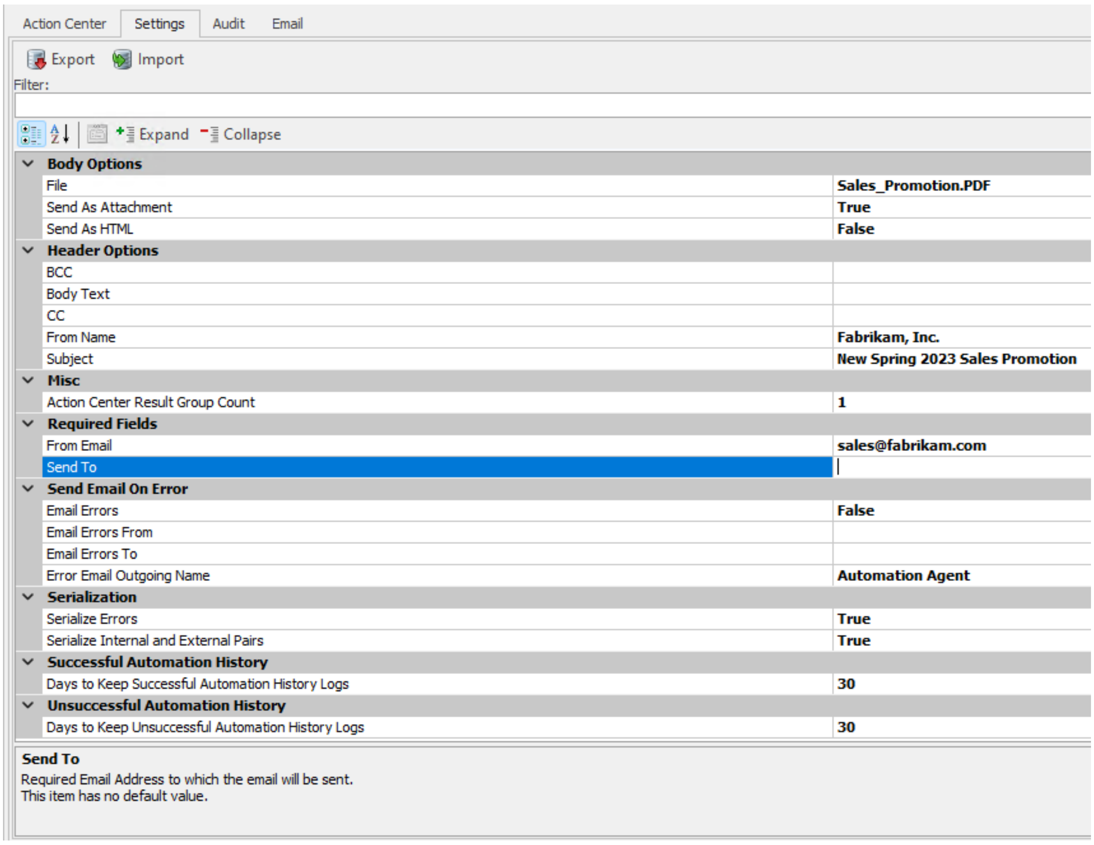
Email

Triggers an email to be sent on a scheduled basis

Some customers want to send an email blast on a regular basis. This may be a promotion, an email to prospective customers, or an announcement. The drafted email is stored in a file location and indicated in the setup of the automation to send to the customer on a schedule.



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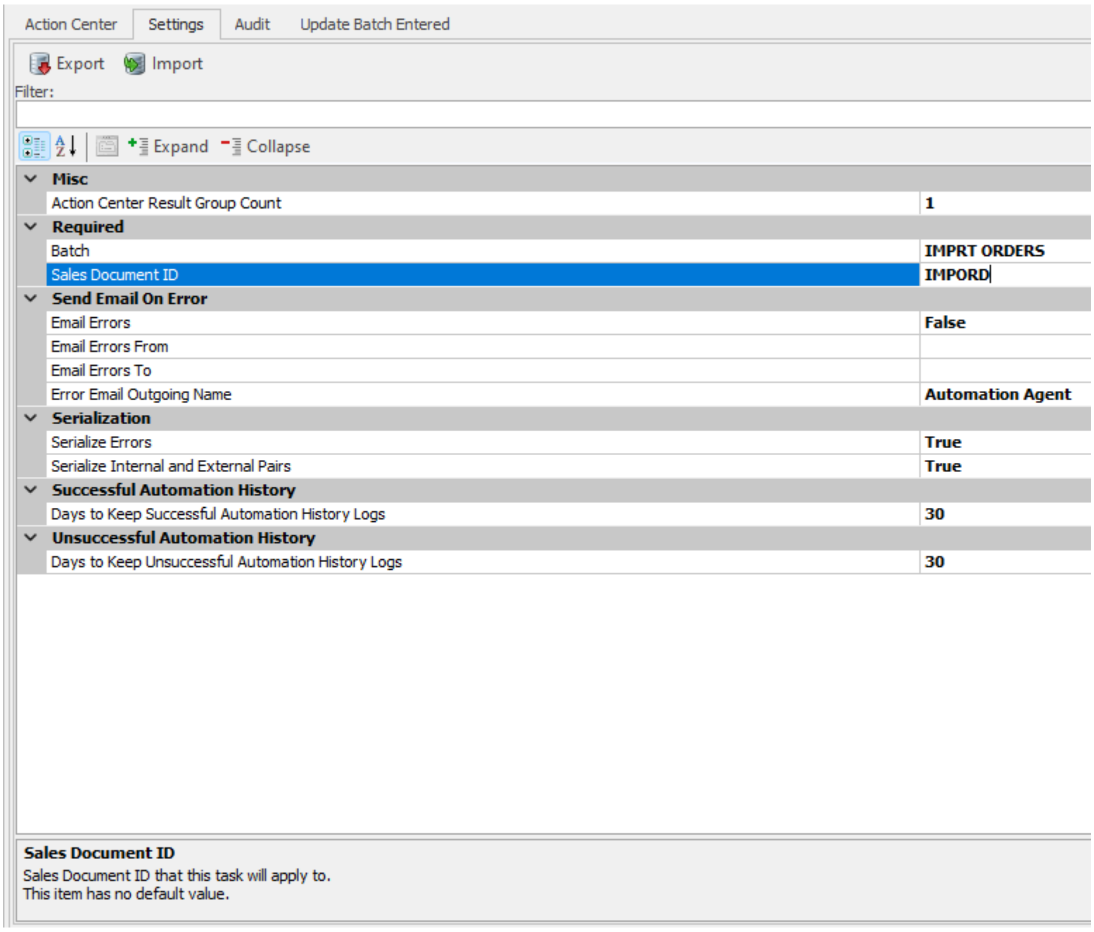
Update Batch Entered

Updates the **Entered Batch** field of sales documents.

If the security sub setting *Update Batch On Forward* under **Sales Document Entry*** is not enabled, **or** a document was entered in Dynamics GP's Sales Transaction Entry window, this automation will update the date/time that the document entered the batch specified in the settings of the automation. It's often beneficial to know when the document entered the batch to ensure that documents do not remain in a batch for extended periods of time in conjunction with Workflow Rules or Sales Monitor.



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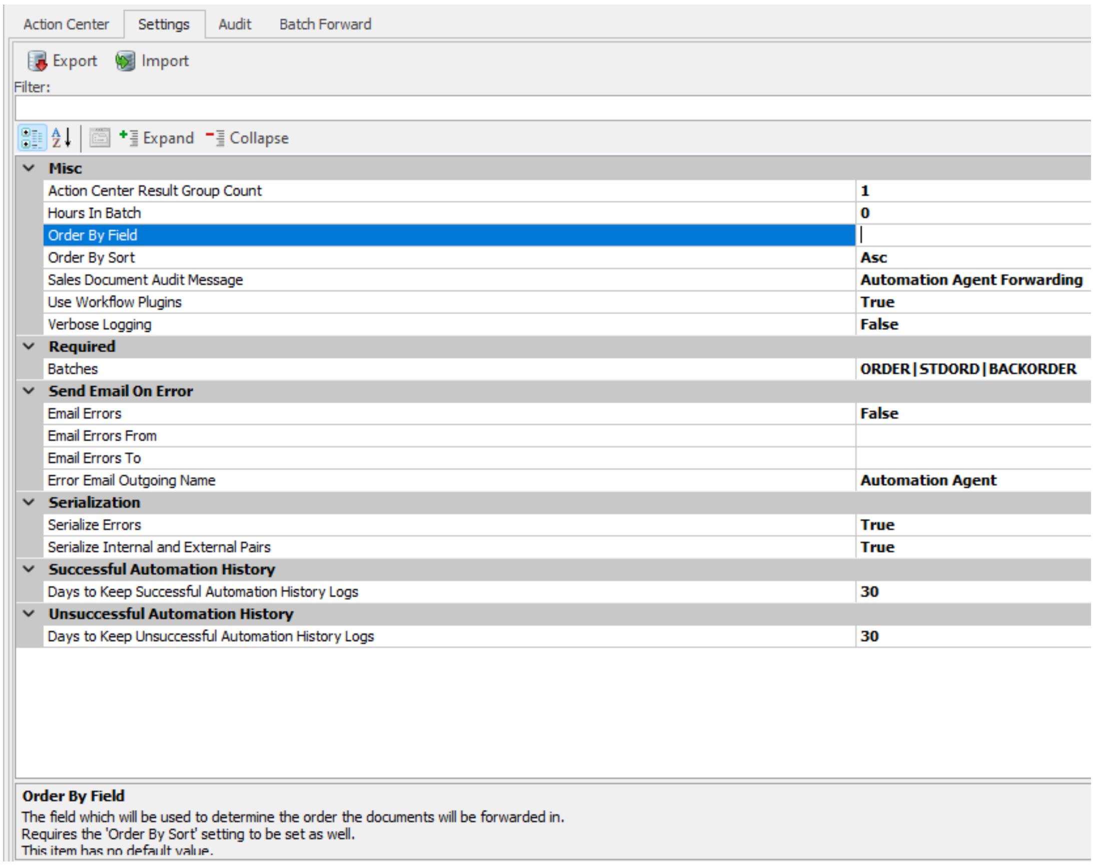
Batch Forward

Triggers the forward of documents from any specified Sales Document Batch. Many customers like this for batches like BACKORDER so that users do not have to monitor the batch for items where the allocation has been updated by SOP-POP linked Purchase Order lines on posted receipts. As receipts are posted and quantities are fulfilled on the linked sales lines, the Batch Forward can act like a sieve, "shaking out"/releasing orders downstream into workflow with fulfilled lines and retaining still-backordered sales documents in the BACKORDER queue.



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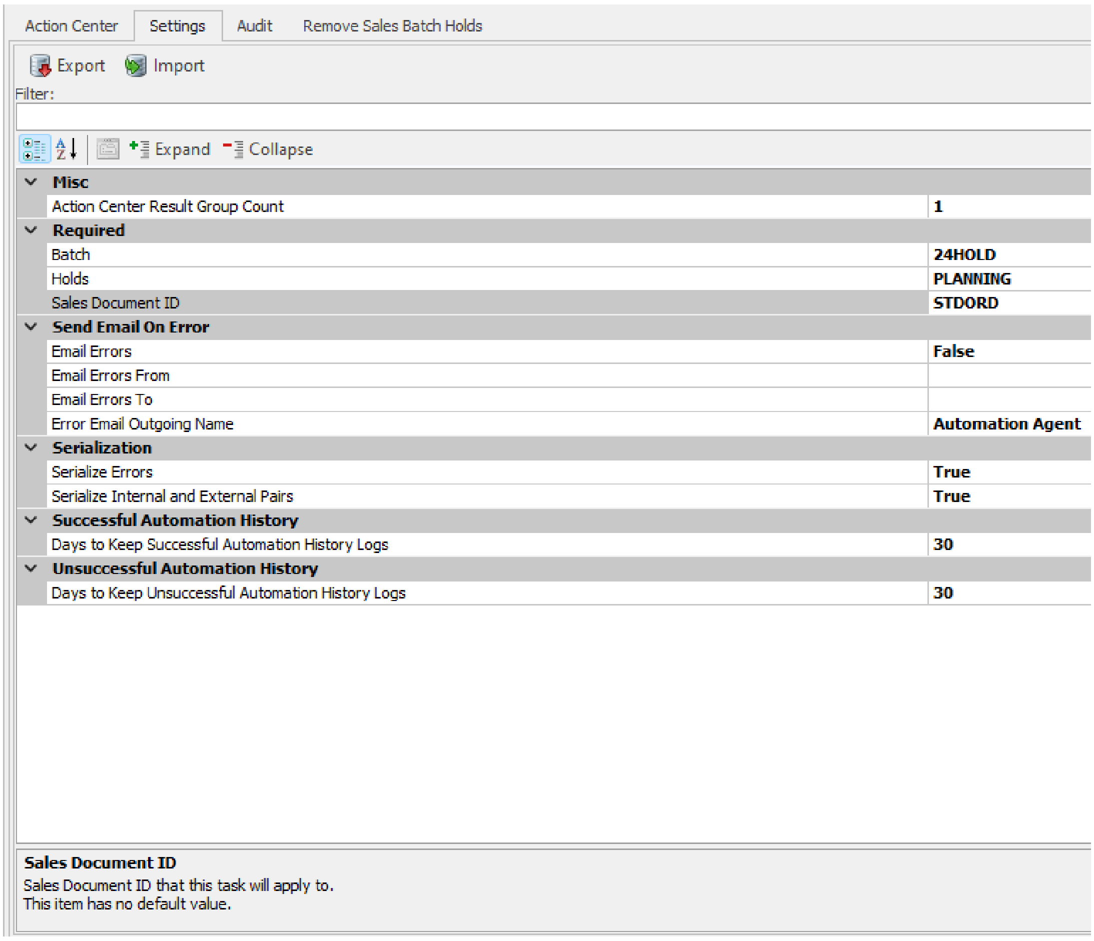
Remove Sales Batch Holds

Triggers the removal of sales batch process holds.

If a hold has been placed on an order to keep the document in a batch based on evaluations set in workflow, this automation will remove the hold based on the schedule setup in the automation settings.



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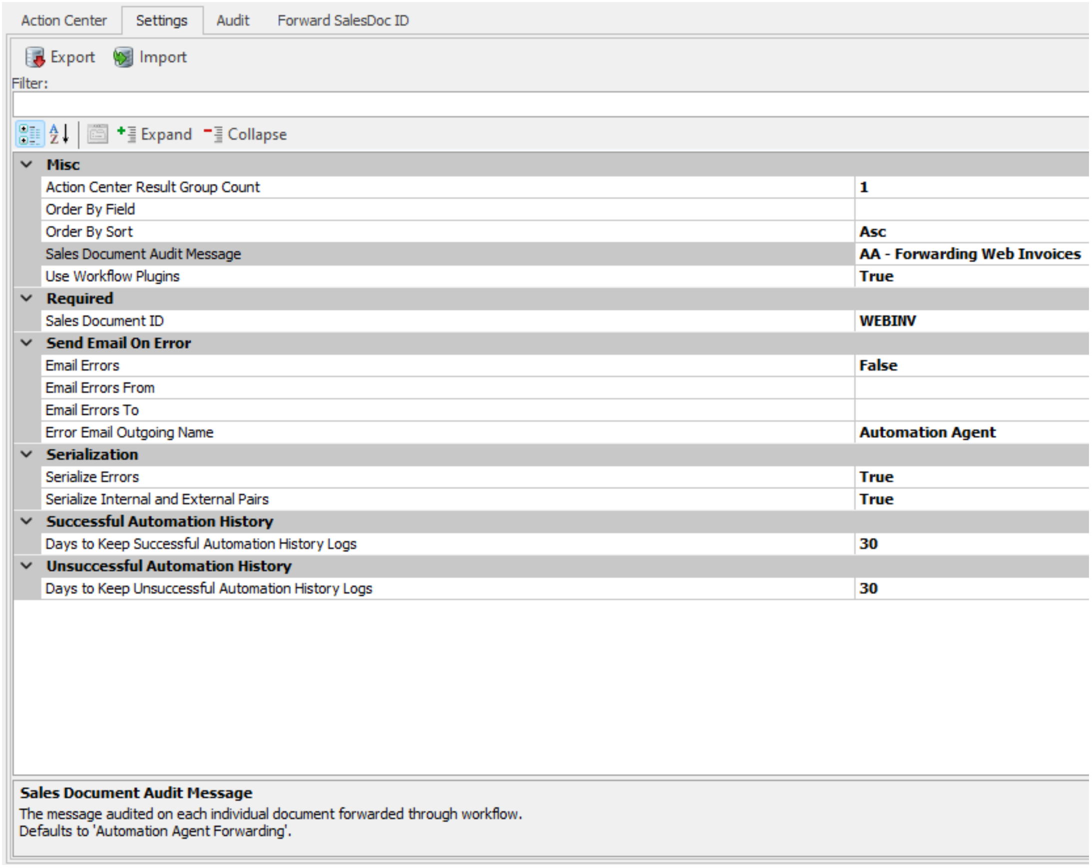
Forward Sales Doc ID

Triggers *all documents* in any batch of a *specified Sales Doc ID* to forward through workflow.

There are some sales document workflows that require *less* complexity, and it may make sense to forward all *documents* with the same the Doc ID rather than one batch within the Doc ID, like an Invoice workflow or Quote workflow with only one starting batch and one batch to transfer or post from. Perhaps these batches are named differently for each Doc ID, so it may be easier to forward the documents in the Doc ID rather than a batch for simplicity.
For instance, a setup with "standard invoices" (STDINV) and "online invoices" (WEBINV) share a very simple workflow, including Batch Names (NEW INVOICE → RDY TO POST). This platform could be configured to forward *only the WEBINV Invoices* on a scheduled basis, apart from STDINV Invoices.



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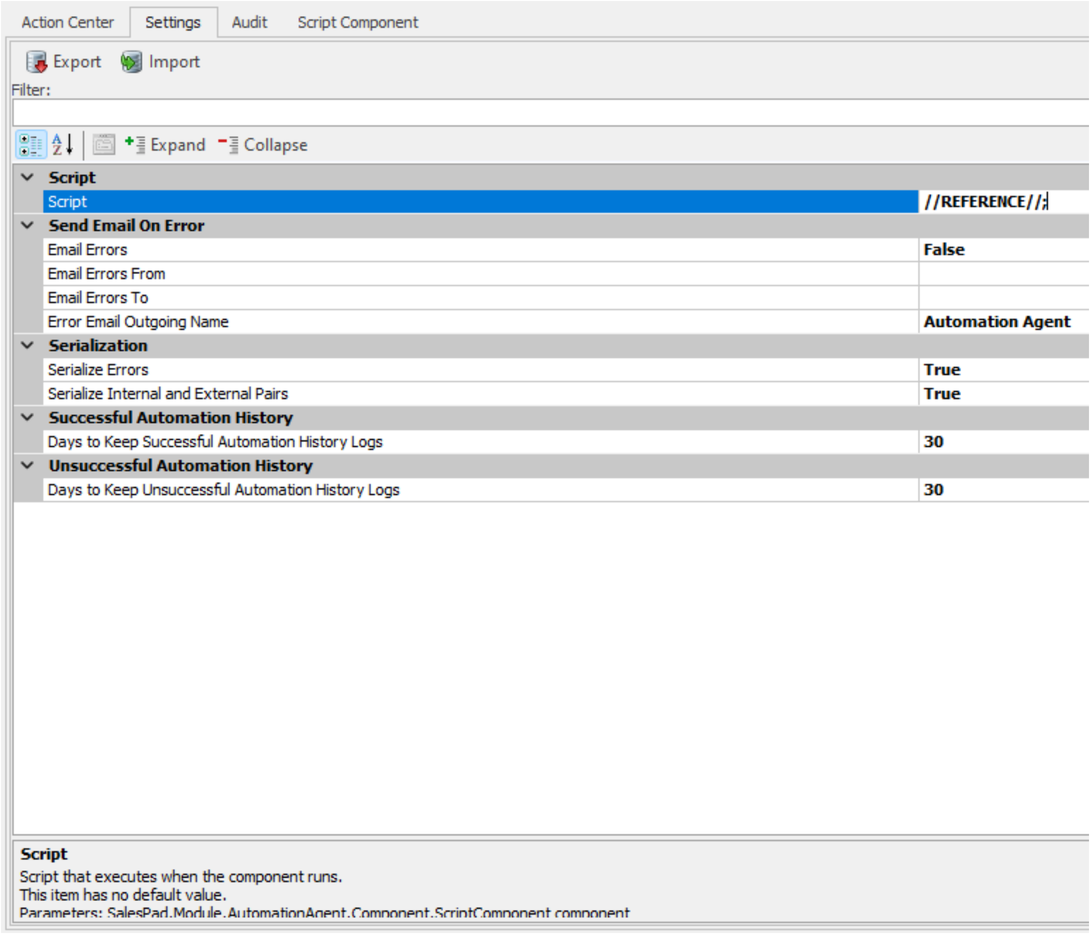
Script

Triggers a C# script to run on a scheduled basis.

This platform will often require assistance from our Custom team, but a C# script can be triggered to run on a scheduled basis, for example to **Save** all documents under certain business-specific conditions, or to update specific fields or update data on the header based on certain factors. Contact your Account Manager for more information on the Script platform's capabilities.



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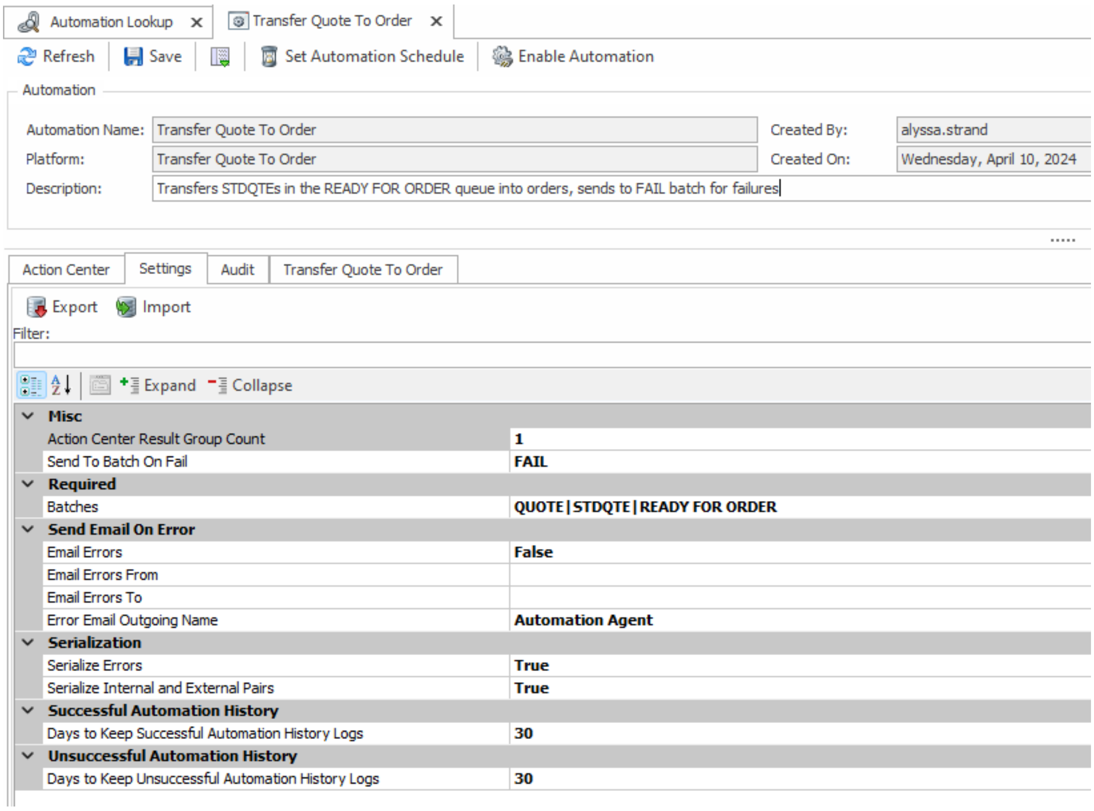
Transfer Quote To Order

Triggers the transfer of quotes to orders.

Configure which queues contain quotes that are ready for transferring, and optionally choose to send quotes that fail transferring to a specific failure queue for review.



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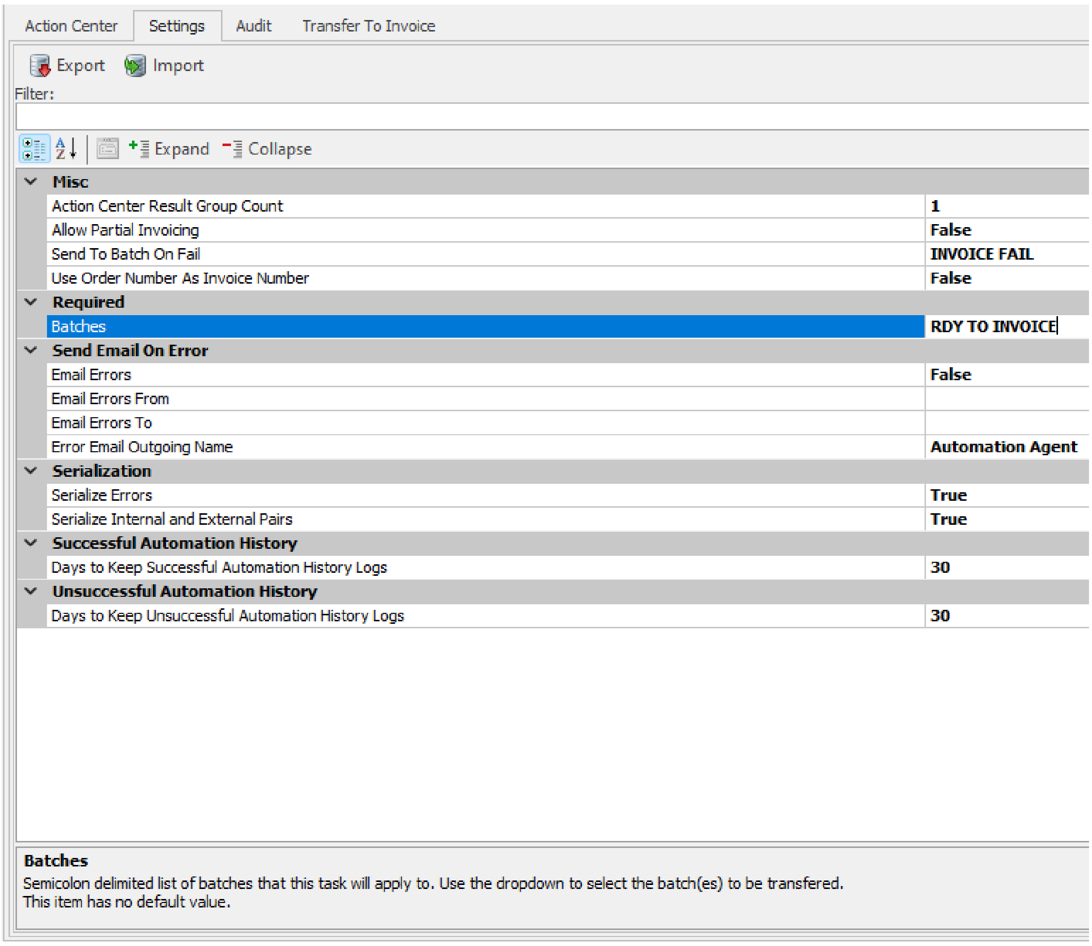
Transfer To Invoice

Triggers the transfer of orders to invoices.

If the customer only transfers documents twice a day, the automation can be set for certain times to transfer invoices so users do not have to monitor the batch and manually transfer orders to invoices. Invoices transferred in this manner can automatically move through configured invoice workflows to streamline printing/email of invoices prior to posting.



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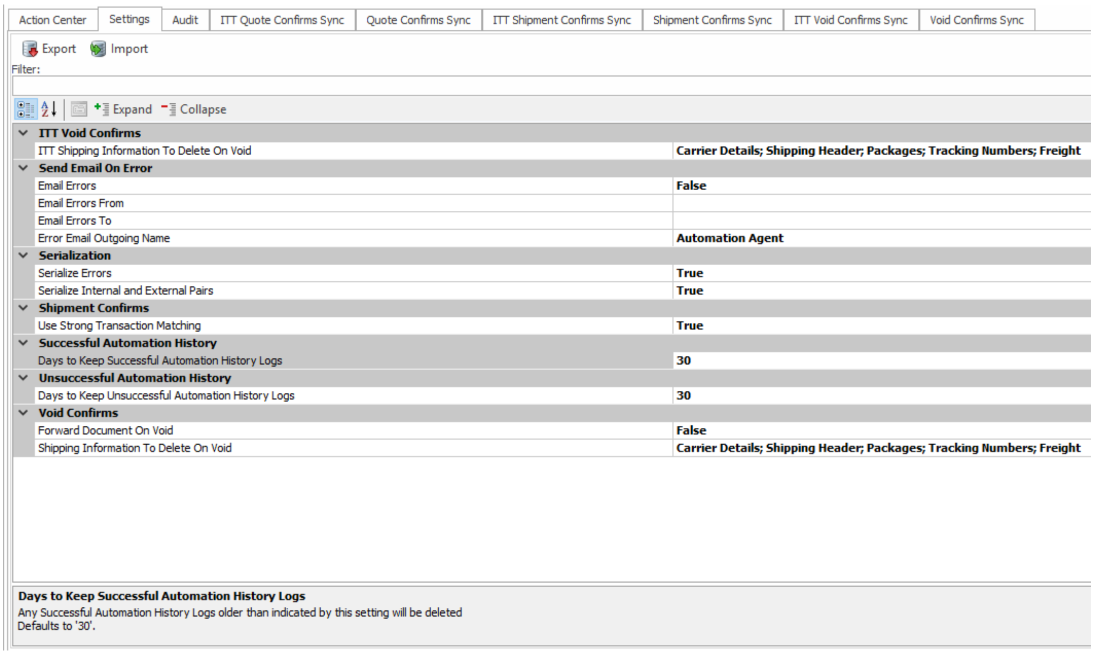
Pacejet

Triggers the scheduled quoting of shipments, import of completed shipment details, or voiding of shipments on Sales documents and In-Transit Transfer documents. [Click here for more information on our Pacejet Integration].



Once the **Process Shipment** plugin has been triggered on orders, the shipment is completed in Pacejet. In order to retrieve the details of that shipment, including the tracking number and freight amount, the automation connects with Pacejet via the API and retrieves these shipment details.

The quoting functionality is similar in that the automation will reach out to Pacejet via the API to provide a rate quote based on the details of the sales document. In order to void a shipment in SalesPad, the *Pacejet Confirms Sync automation* must be setup and enabled to run or the details will not be updated in SalesPad or GP.

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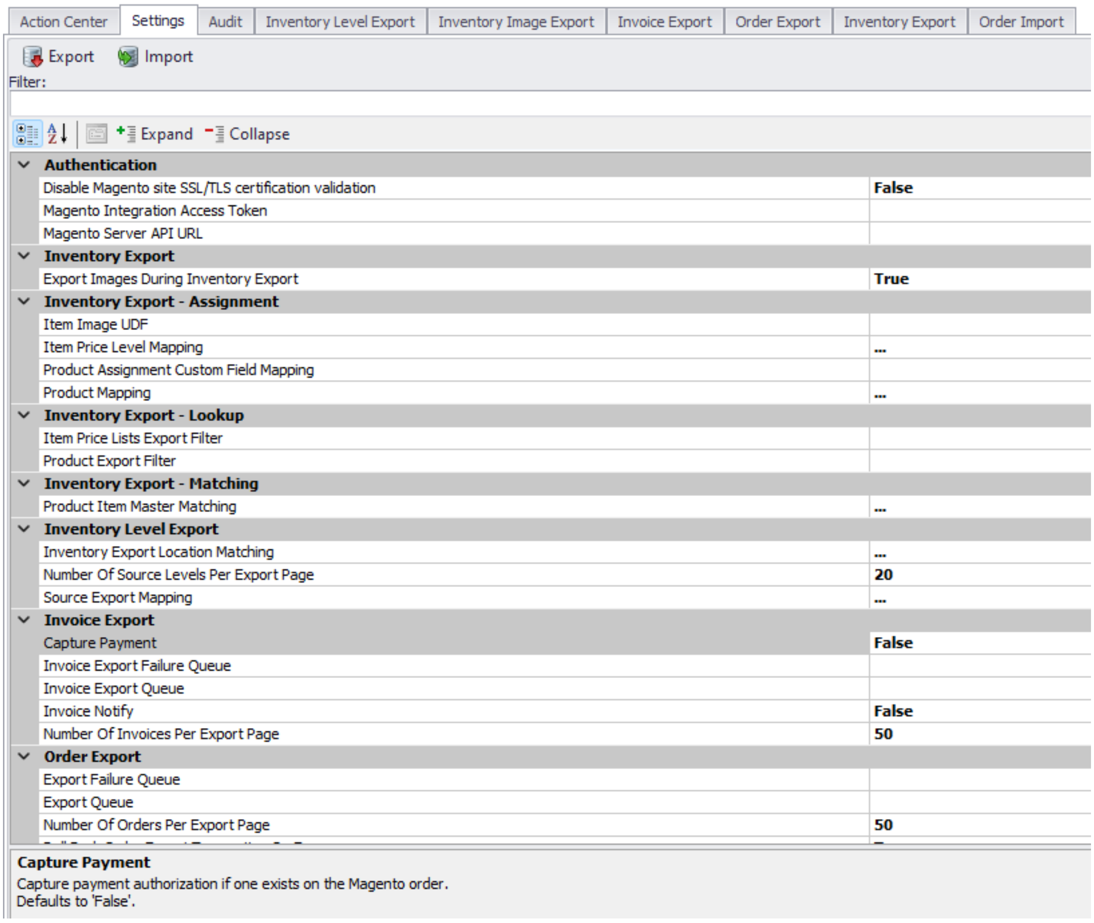
Magento*

Triggers the Import and Export of order and inventory details to and from the Magento ecommerce site. [Click here for more information on our Magento integration.]



Orders placed through a customer's website created with Magento can be imported to SalesPad so that users do not have to manually enter the data to SalesPad Desktop/GP. Inventory levels and item details can also be exported to their Magento site via the API and AutomationAgent service making it easier to update items and maintain inventory levels on the website.

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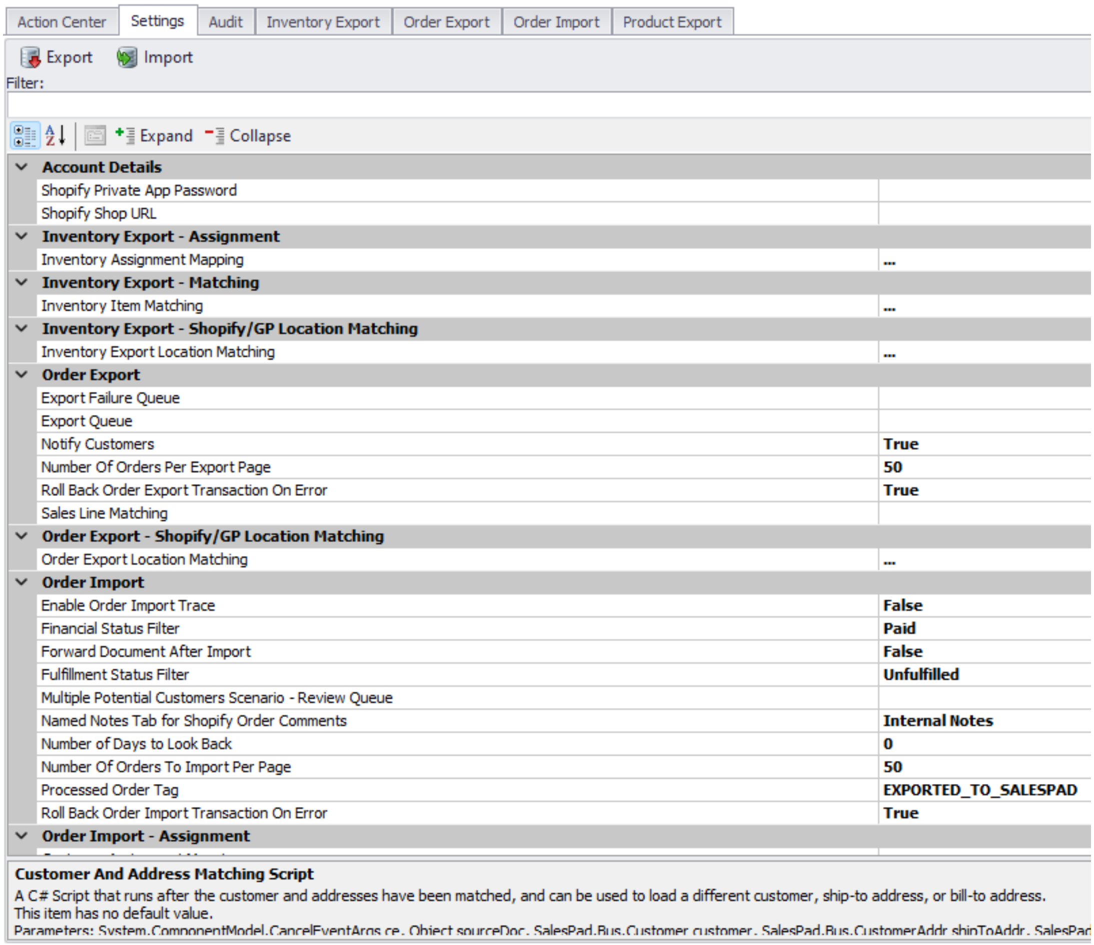
Shopify*

Triggers the Import and Export of order and inventory details to and from the Shopify ecommerce site. [Click here to find out more about our Shopify integration.]



Orders placed through a customer's website created with Shopify can be imported to SalesPad so that users do not have to manually enter the data to SalesPad Desktop/GP. Inventory levels and item details can also be exported to their Shopify site via the API and AutomationAgent service making it easier to update items and maintain inventory levels on the website.

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WooCommerce*

Triggers the Import and Export of order and inventory details to and from the WooCommerce site.

[Find our more about our Cavallo-WooCommerce Integration.]

Orders placed through a customer's website created with WooCommerce can be imported to SalesPad so that users do not have to manually enter the data to SalesPad Desktop/GP. Inventory levels and item details can also be exported to their WooCommerce site via the API and AutomationAgent service making it easier to update items and maintain inventory levels on the website.

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