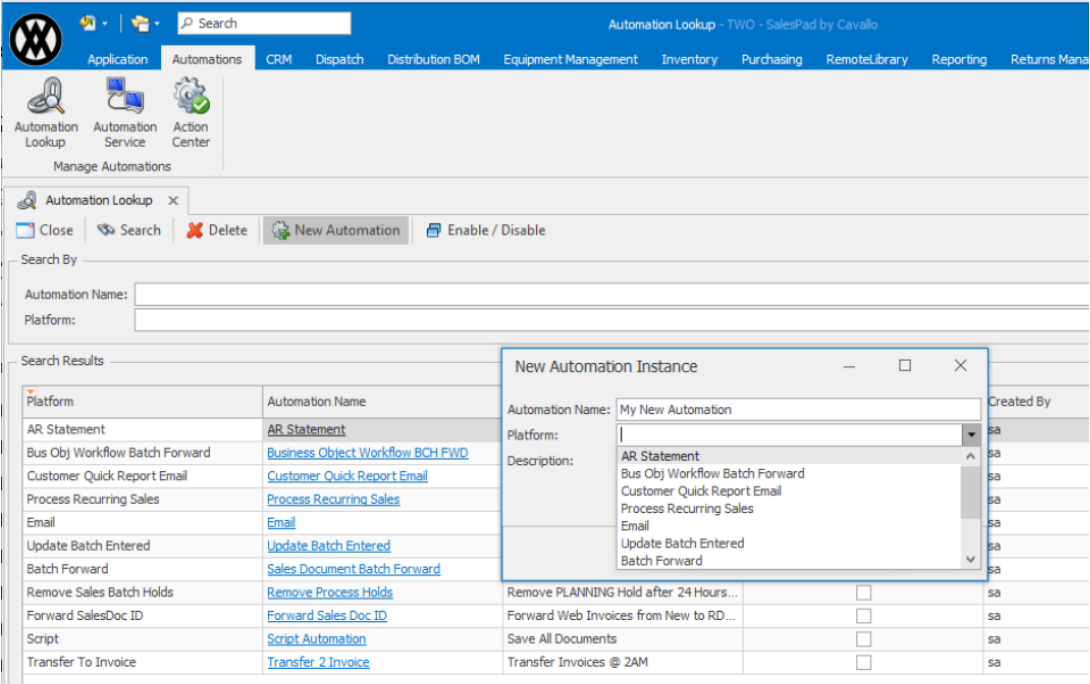




Automation Agent - Platform Fact Sheet

Professional Services - 2025-06-12 - 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 Name 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.

Table of Contents

- [A/R Statement](#)
- [Business Object Workflow Batch Forward](#)
- [Customer Quick Report Email](#)
- [System User Quick Report Email](#)

- [Process Recurring Sales](#)
- [Email](#)
- [Update Batch Entered](#)
- [Sales Batch Forward](#)
- [Remove Sales Batch Process Holds](#)
- [Forward Sales Doc ID](#)
- [Script](#)
- [Transfer Quote to Order](#)
- [Transfer to Invoice](#)
- [Pacejet](#)
- [Magento](#)
- [Shopify](#)
- [WooCommerce](#)

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.

Action Center Settings Audit A/R Statement	
<div> <div>Export</div> <div>Import</div> </div> <div>Filter:</div> <div> <div>Expand</div> <div>Collapse</div> </div>	
Emailing	
Copy AR Statement To Resources	True
Email Primary Address Type	PrimaryStatementTo
Email Secondary Address Type	PrimaryBillTo
Email Sender Address	
Email Template	
Include Bcc Email Address	False
Include Cc Email Address	False
Test Email To Address	
Misc	
Customer Payment Terms	
Outstanding Balance	0
Report	
Customer AR Statement Report	
Include Invoice Reports	True
Include Return Reports	False
Copy AR Statement To Resources True/false value that determines if the AR Statement report that's generated is copied to the Resources on the Customer Card. Defaults to 'True'.	

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

Action Center

Settings

Audit

Batch Forward

Export

Import

Filter:

Expand

Collapse

Misc

Order By Field

Order By Sort

Use Workflow Plugins

Send Email On Error

Email Errors

Email Errors From

Email Errors To

Error Email Outgoing Name

Serialization

Serialize Errors

Serialize Internal and External Pairs

Successful Automation History

Days to Keep Successful Automation History Logs

Unsuccessful Automation History

Days to Keep Unsuccessful Automation History Logs

Workflow

Batches

Business Object Type

Workflow

Asc

True

False

Automation Agent

True

True

30

30

Assembly

CaseTrackerCase

Customer

CustomerEquipment

Equipment

EquipmentSearch

EquipmentSoldSearch

InventoryTransaction

ItemMaster

MO

Opportunity

Product

Business Object Type

Select the Business Object Type that should be forwarded.

This item has no default value.

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.

Action Center

Settings

Audit

Customer Quick Report Email

Export

Import

Filter:

Expand

Collapse

Body Options

Send As HTML

False

Email Options

Email Attachment Name

Email BCC Field

Email CC Field

From Name

Filters

Contact Email Address Type

Primary

Contact Matching

Misc

Action Center Result Group Count

1

Required

Email Field

Email

Email Template

From Email

Quick Report

Send Email On Error

Email Errors

Email Errors From

Email Errors To

Error Email Outgoing Name

Credit Card Daily Trx Summary

Credit Card Summary

End of Day Trxs

PayLink

purchase orders

Sales Commissions Report

Tesdt

Serialization

Serialize Errors

Serialize Internal and External Pairs

Successful Automation History

Days to Keep Successful Automation History Logs

Unsuccessful Automation History

Quick Report

The quick report this email platform will utilize when ran.
This item has no default value.

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](#).

Action Center

Settings

Audit

System User Quick Report Email

Export

Import

Filter:

Expand

Collapse

Email Options

Email Field

Email

Email From Name

Email Template

Get Email Lists Script

List of Bcc Emails

List of Cc Emails

List of To Emails

Quick Report User Name Search Fields

Security Groups or System Users to Email

Send As HTML

False

Send Individual System User Emails

True

Misc

Action Center Result Group Count

1

Required

From Email

Quick Reports

Send Email On Error

Email Errors

False

Email Errors From

Email Errors To

Error Email Outgoing Name

Automation Agent

Serialization

Serialize Errors

True

Serialize Internal and External Pairs

True

Successful Automation History

Days to Keep Successful Automation History Logs

30

Unsuccessful Automation History

Days to Keep Unsuccessful Automation History Logs

30

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.

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.

Action Center	Settings	Audit	Process Recurring Sales
<div>Export Import</div> <div>Filter:</div> <div>Expand Collapse</div>			
Misc			
Action Center Result Group Count			1
Comment			
Required			
Combine Recurring Sales Definitions			False
Frequency			1
Frequency Type			Days
Recurring Sales Definition Names			
Use All Recurring Sales Definition Names			False
Send Email On Error			
Email Errors			False
Email Errors From			
Email Errors To			
Error Email Outgoing Name			Automation Agent
Serialization			
Serialize Errors			True
Serialize Internal and External Pairs			True
Successful Automation History			
Days to Keep Successful Automation History Logs			30
Unsuccessful Automation History			
Days to Keep Unsuccessful Automation History Logs			30
Recurring Sales Definition Names Semicolon delimited list of Recurring Sales Definitions to be processed. This item has no default value.			

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.

Action Center		Settings	Audit	Email
Export Import				
Filter:				
Expand Collapse				
Body Options				
File	Sales_Promotion.PDF			
Send As Attachment	True			
Send As HTML	False			
Header Options				
BCC				
Body Text				
CC				
From Name	Fabrikam, Inc.			
Subject	New Spring 2023 Sales Promotion			
Misc				
Action Center Result Group Count	1			
Required Fields				
From Email	sales@fabrikam.com			
Send To				
Send Email On Error				
Email Errors	False			
Email Errors From				
Email Errors To				
Error Email Outgoing Name	Automation Agent			
Serialization				
Serialize Errors	True			
Serialize Internal and External Pairs	True			
Successful Automation History				
Days to Keep Successful Automation History Logs	30			
Unsuccessful Automation History				
Days to Keep Unsuccessful Automation History Logs	30			
Send To Required Email Address to which the email will be sent. This item has no default value.				

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.

Action Center
Settings
Audit
Update Batch Entered

Export
Import

Filter:

Expand
Collapse

Misc	
Action Center Result Group Count	1
Required	
Batch	IMPRT ORDERS
Sales Document ID	IMPORD
Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
Successful Automation History	
Days to Keep Successful Automation History Logs	30
Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Sales Document ID
Sales Document ID that this task will apply to.
This item has no default value.

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.

Action Center

Settings

Audit

Batch Forward

Export

Import

Filter:

Expand

Collapse

▼ Misc	
Action Center Result Group Count	1
Hours In Batch	0
Order By Field	
Order By Sort	Asc
Sales Document Audit Message	Automation Agent Forwarding
Use Workflow Plugins	True
Verbose Logging	False
▼ Required	
Batches	ORDER STDORDER BACKORDER
▼ Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
▼ Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
▼ Successful Automation History	
Days to Keep Successful Automation History Logs	30
▼ Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Order By Field

The field which will be used to determine the order the documents will be forwarded in.
Requires the 'Order By Sort' setting to be set as well.
This item has no default value.

Remove Sales Batch Holds

Triggers the removal of [Sales Document 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.

Action Center
Settings
Audit
Remove Sales Batch Holds

Export
Import

Filter:

Expand
Collapse

▼ Misc	
Action Center Result Group Count	1
▼ Required	
Batch	24HOLD
Holds	PLANNING
Sales Document ID	STDORD
▼ Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
▼ Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
▼ Successful Automation History	
Days to Keep Successful Automation History Logs	30
▼ Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Sales Document ID
Sales Document ID that this task will apply to.
This item has no default value.

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.

Action Center
Settings
Audit
Forward SalesDoc ID

Export
Import

Filter:

Expand
Collapse

Misc	
Action Center Result Group Count	1
Order By Field	
Order By Sort	Asc
Sales Document Audit Message	AA - Forwarding Web Invoices
Use Workflow Plugins	True
Required	
Sales Document ID	WEBINV
Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
Successful Automation History	
Days to Keep Successful Automation History Logs	30
Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Sales Document Audit Message
The message audited on each individual document forwarded through workflow.
Defaults to 'Automation Agent Forwarding'.

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.

Action Center
Settings
Audit
Script Component

Export
Import

Filter:

Expand
Collapse

▼ Script	
Script	//REFERENCE//
▼ Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
▼ Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
▼ Successful Automation History	
Days to Keep Successful Automation History Logs	30
▼ Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Script
Script that executes when the component runs.
This item has no default value.
Parameters: SalesPad.Module.AutomationAgent.Component.ScriptComponent component

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.

Automation Lookup
Transfer Quote To Order

Refresh
Save
Set Automation Schedule
Enable Automation

Automation

Automation Name: Transfer Quote To Order
Created By: alyssa.strand
Platform: Transfer Quote To Order
Created On: Wednesday, April 10, 2024
Description: Transfers STDQTEs in the READY FOR ORDER queue into orders, sends to FAIL batch for failures

Action Center
Settings
Audit
Transfer Quote To Order

Export
Import

Filter:

Expand
Collapse

Misc	
Action Center Result Group Count	1
Send To Batch On Fail	FAIL
Required	
Batches	QUOTE STDQTE READY FOR ORDER
Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
Successful Automation History	
Days to Keep Successful Automation History Logs	30
Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

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.

Action Center
Settings
Audit
Transfer To Invoice

Export
Import

Filter:

Expand
Collapse

Misc	
Action Center Result Group Count	1
Allow Partial Invoicing	False
Send To Batch On Fail	INVOICE FAIL
Use Order Number As Invoice Number	False
Required	
Batches	RDY TO INVOICE
Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
Successful Automation History	
Days to Keep Successful Automation History Logs	30
Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30

Batches
Semicolon delimited list of batches that this task will apply to. Use the dropdown to select the batch(es) to be transfered.
This item has no default value.

Pacejet

Triggers the scheduled quoting of shipments, import of completed shipment details, or voiding of shipments on Sales documents and In-Transit Transfer documents. [Pacejet](#).

Action Center
Settings
Audit
ITT Quote Confirms Sync
Quote Confirms Sync
ITT Shipment Confirms Sync
Shipment Confirms Sync
ITT Void Confirms Sync
Void Confirms Sync

Export
Import

Filter:

Expand
Collapse

ITT Void Confirms	
ITT Shipping Information To Delete On Void	Carrier Details; Shipping Header; Packages; Tracking Numbers; Freight
Send Email On Error	
Email Errors	False
Email Errors From	
Email Errors To	
Error Email Outgoing Name	Automation Agent
Serialization	
Serialize Errors	True
Serialize Internal and External Pairs	True
Shipment Confirms	
Use Strong Transaction Matching	True
Successful Automation History	
Days to Keep Successful Automation History Logs	30
Unsuccessful Automation History	
Days to Keep Unsuccessful Automation History Logs	30
Void Confirms	
Forward Document On Void	False
Shipping Information To Delete On Void	Carrier Details; Shipping Header; Packages; Tracking Numbers; Freight

Days to Keep Successful Automation History Logs
Any Successful Automation History Logs older than indicated by this setting will be deleted
Defaults to '30'.

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.

Magento*

Triggers the Import and Export of order and inventory details to and from the Magento ecommerce site. [Adobe Commerce \(Magento 2\) Integration](#)

Action Center	Settings	Audit	Inventory Level Export	Inventory Image Export	Invoice Export	Order Export	Inventory Export	Order Import
<div>Export Import</div> <div>Filter:</div> <div>Expand Collapse</div> <div><div>Authentication</div><div>Disable Magento site SSL/TLS certification validationFalse</div><div>Magento Integration Access Token</div><div>Magento Server API URL</div><div>Inventory Export</div><div>Export Images During Inventory ExportTrue</div><div>Inventory Export - Assignment</div><div>Item Image UDF</div><div>Item Price Level Mapping---</div><div>Product Assignment Custom Field Mapping</div><div>Product Mapping---</div><div>Inventory Export - Lookup</div><div>Item Price Lists Export Filter</div><div>Product Export Filter</div><div>Inventory Export - Matching</div><div>Product Item Master Matching---</div><div>Inventory Level Export</div><div>Inventory Export Location Matching---</div><div>Number Of Source Levels Per Export Page20</div><div>Source Export Mapping---</div><div>Invoice Export</div><div>Capture PaymentFalse</div><div>Invoice Export Failure Queue</div><div>Invoice Export Queue</div><div>Invoice NotifyFalse</div><div>Number Of Invoices Per Export Page50</div><div>Order Export</div><div>Export Failure Queue</div><div>Export Queue</div><div>Number Of Orders Per Export Page50</div></div> <div><div>Capture Payment</div><div>Capture payment authorization if one exists on the Magento order. Defaults to 'False'.</div></div>								

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.

Shopify*

Triggers the Import and Export of order and inventory details to and from the Shopify

ecommerce site. [Shopify Integration](#)

Action Center	Settings	Audit	Inventory Export	Order Export	Order Import	Product Export
Export Import						
Filter:						
Expand Collapse						
Account Details						
Shopify Private App Password						
Shopify Shop URL						
Inventory Export - Assignment						
Inventory Assignment Mapping						
Inventory Export - Matching						
Inventory Item Matching						
Inventory Export - Shopify/GP Location Matching						
Inventory Export Location Matching						
Order Export						
Export Failure Queue						
Export Queue						
Notify Customers						
Number Of Orders Per Export Page						
Roll Back Order Export Transaction On Error						
Sales Line Matching						
Order Export - Shopify/GP Location Matching						
Order Export Location Matching						
Order Import						
Enable Order Import Trace						
Financial Status Filter						
Forward Document After Import						
Fulfillment Status Filter						
Multiple Potential Customers Scenario - Review Queue						
Named Notes Tab for Shopify Order Comments						
Number of Days to Look Back						
Number Of Orders To Import Per Page						
Processed Order Tag						
Roll Back Order Import Transaction On Error						
Order Import - Assignment						
Customer And Address Matching Script						
A C# Script that runs after the customer and addresses have been matched, and can be used to load a different customer, ship-to address, or bill-to address. This item has no default value.						
Parameters: System.ComponentModel.CancelEventArgs ce, Object sourceDoc, SalesPad.Bus.Customer customer, SalesPad.Bus.CustomerAddr shipToAddr, SalesPad						

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.

WooCommerce*

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

[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.

Action Center

Settings

Audit

Product Export

Inventory Level Export

Order Export

Order Import

Export

Import

Filter:

Expand

Collapse

▼

Authentication

Disable WooCommerce site SSL/TLS certification validation

False

WooCommerce API Key

WooCommerce API Secret

WooCommerce Server API URL

▼

Inventory Export - Assignment

Inventory Level Mapping

▼

Inventory Export - Lookup

Inventory Level Lookup

▼

Inventory Level Export

Log WooCommerce Inventory Levels Not Updated

False

Number Of Records Per Export Page

10

▼

Order Export

Export Failure Queue

Export Queue

Roll Back Order Export Transaction On Error

When enabled, the transaction encompassing the order export will be rolled back when an error occurs. This prevents data from a partially completed export from being saved to the database. Defaults to 'True'.