

AUTOMATION AGENT

Next-level efficiency

Get More Done Without Adding to Your Headcount

Leverage SalesPad® Automation Agent to streamline manual tasks without lifting a finger, and allow them to run in the background while you focus on growing your business. Create workflows tailored to the unique needs of your business, take human error out of the equation, and get hours back in your day with this powerful tool.



Automate manual tasks



Minimize human intervention



Increase order throughput



Create steady company growth

Automation Component H...	Automation Instance ID	Component ID	Component Name	Automation Began	Automation Finished	Automation Direction	Updated On	Created On	Integrated Data	Unresolved Error Count
117	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	5/3/2022 10:30:00 AM	5/3/2022 10:30:17 AM	IMPORT	5/3/2022 10:30:17 AM	5/3/2022 10:30:00 AM		0
121	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	5/4/2022 2:36:04 PM	5/4/2022 2:36:14 PM	IMPORT	5/4/2022 2:36:14 PM	5/4/2022 2:36:04 PM		0
123	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	5/10/2022 11:03:33 AM	5/10/2022 11:03:40 AM	IMPORT	5/10/2022 11:03:40 AM	5/10/2022 11:03:33 AM		0
129	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	5/12/2022 3:40:38 PM	5/12/2022 3:40:46 PM	IMPORT	5/12/2022 3:40:46 PM	5/12/2022 3:40:38 PM		0
178	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	6/22/2022 11:33:07 AM	6/22/2022 11:33:09 AM	IMPORT	6/22/2022 11:33:09 AM	6/22/2022 11:33:07 AM		0
179	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	6/22/2022 11:33:18 AM	6/22/2022 11:33:18 AM	IMPORT	6/22/2022 11:33:18 AM	6/22/2022 11:33:18 AM		0
180	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	6/22/2022 11:39:42 AM	6/22/2022 11:39:43 AM	IMPORT	6/22/2022 11:39:43 AM	6/22/2022 11:39:42 AM		0
181	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	6/22/2022 11:39:50 AM	6/22/2022 11:39:50 AM	IMPORT	6/22/2022 11:39:50 AM	6/22/2022 11:39:50 AM		0
207	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	9/9/2022 9:28:31 AM	9/9/2022 9:28:32 AM	IMPORT	9/9/2022 9:28:32 AM	9/9/2022 9:28:31 AM		1
208	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	9/9/2022 9:29:05 AM	9/9/2022 9:29:09 AM	IMPORT	9/9/2022 9:29:09 AM	9/9/2022 9:29:05 AM		0
213	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	9/15/2022 10:55:51 AM	9/15/2022 10:56:06 AM	IMPORT	9/15/2022 10:56:06 AM	9/15/2022 10:55:51 AM		1
288	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	12/16/2022 11:28:29 AM	12/16/2022 11:28:33 AM	IMPORT	12/16/2022 11:28:33 AM	12/16/2022 11:28:29 AM	DOWNLOAD	0
289	CAF56481-21B6-4CB0-AD...	Transfer To Invoice Task	Transfer To Invoice Task	12/16/2022 2:47:23 PM	12/16/2022 2:47:30 PM	IMPORT	12/16/2022 2:47:30 PM	12/16/2022 2:47:23 PM	DOWNLOAD	0

"We have a leaner staff because of SalesPad®. We're able to do more work in less time. Just grabbing your orders and doing a mass update is something that we do in SalesPad that we couldn't do in Dynamics GP, and the time savings is huge. I mean huge—you don't really realize it until you actually see it be done. And once you actually see it, it's... 'How did we live without it?'"

- Gail Perry, Office Manager at Handi-Craft Co.



Automation Agent in Action

From automatically generating invoices and daily reports and emailing them to customers, to moving sales orders and quotes from queue to queue, Automation Agent takes the hassle out of running a tight operation. Keep orders flowing and critical information at hand with no extra effort on your part.

Take this efficiency a step further by combining Automation Agent with other SalesPad features like workflow, with which users can automatically import online orders and export inventory.

Key Features

Create and schedule jobs that will automatically:

- Email AR statements to customers
- Email reports or attachments to internal users or customers
- Forward all sales documents in a specific workflow queue
- Remove holds from sales documents in a specific workflow queue
- Transfer sales orders to invoices
- Trigger any functionality that can be scripted

“We’ve had 80% growth in the last two years without having to add employees to handle it...we’re able to do it with workflow modifications and Automation Agent.”

- Jim Bennett, CFO of C. Bennett

