

AUTOMATION AGENT™

All the advantages of workflow, cranked to eleven.

SAVE TIME WITH SOFTWARE THAT HITS THE START BUTTON FOR YOU.

What is AutomationAgent™?

It's right in the name — AutomationAgent™ is a SalesPad module that automates processes that would normally require manual input to operate. This feature is designed to minimize the number of clicks and, by extension, the amount of time it takes to complete tasks throughout your entire workflow.

AutomationAgent should be used if:

- Daily, repetitive tasks take too much time out of your day
- Workflow has streamlined your productivity, but it could use another boost
- Manual labor bottlenecks leave you waiting on other team members

What does AutomationAgent look like in action?

AutomationAgent accelerates your company's growth by automating the tedious and time-consuming aspects across your order-to-cash cycle. Establish your order-to-cash workflow, then decide which tasks within that workflow should trigger automated actions.

AutomationAgent actions can apply to tasks like:

- Forwarding documents
- Importing data
- Emailing documents
- Invoicing batches
- Removing document holds
- Running Scripts

How do I use Integrations with AutomationAgent?

If you've got third party tools that you need integrated into your workflow, AutomationAgent is just what you've been looking for. With AutomationAgent, third-party apps can be incorporated into automation schedules for greater business acceleration.