

ACT / TRIDENT AUTOMATION

Turn approved requests into real JobBOSS work.

Put AI to work on supported JobBOSS tasks, combining investigation, business documents and transactions through a configured approval workflow.

BUILT FOR

For teams with recurring JobBOSS work, a clear process owner and a defined point for reviewing requests and results.

REVIEW THE ACTION. VERIFY THE RESULT.

With approval enabled, an authorized JobBOSS operator reviews the proposed AI write before Trident executes it. JobBOSS remains the system of record.

MOVE FROM A REQUEST TO COMPLETED WORK

01 Prepare a customer quote

Create a JobBOSS quote from supplied request details, then generate its supported PDF.

02 Turn an accepted quote into an order

Request quote-to-order conversion using existing quote details and configured approval.

03 Move packing lists into invoicing

Create one unposted invoice from eligible packing lists for the same customer. Posting remains a separate step.

04 Correct a verified data-entry error

Investigate and correct an entry such as an overtime factor of 1500 instead of 1.5, then verify the result.

INCLUDED IN THE PACKAGE

- Everything in Trident Insights
- Integration API
- Transactional AI access
- JobBOSS context and configurable approval

START WITH ONE REPEATABLE WORKFLOW

Define its trigger, inputs, owner and approval point. Test the supported operations and resulting records before expanding into additional work.

Which recurring task would you put to work?

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Customer-specific workflow design, installation, onboarding and third-party services are separately scoped. AI-generated outputs and consequential actions require customer review.